Workforce Management Web for Supervisors Help

Workforce Management 8.5.2

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Workforce Management 8.5 Web for Supervisors (Classic) Help

Welcome to Workforce Management (WFM) Web for Supervisors (Classic) Help. Use this page to go directly to the information you need, or use the Table of Contents to take a step-by-step tour of all the features and functions in WFM Web for Supervisors.

Tip

WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see *Workforce Management Supervisor Help*, which describes the new Forecast module.

Getting Started

Learn about WFM controls, setting the date, and finding agents in large tables.

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Overview

This Help provides a comprehensive guide to the features and functions of the Workforce Management (WFM) Web for Supervisors (Classic) interface. In addition, it offers some general guidance on using web browsers. If you require more assistance on using your web browser, refer to the browser's help system.

> **Tip**
> WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see *Workforce Management Supervisor Help*, which describes the new Forecast module.

Supervisors Help Options

The red underlined links below will take you directly to a topic. Links are available throughout Supervisors Help to give you easy access to information.

Getting Started	Explains how to perform WFM Web basics such as logging in and out, choosing dates, and navigating through WFM Web.
Policies Module	Explains how to configure the following Policy objects (rules that WFM considers when making forecasts and setting up schedules): **Exception Types**, **Time-Off Types**, **Time-Off Rules**, **Meetings**, **Marked Time**, **Shifts**, **Contracts**, and **Rotating Patterns**.
Configuration Module	Explains how to: • Configure WFM to send email notifications when the following types of events occur: Schedule modifications (agent notifications), changes in the status of schedule trade requests (user and agent notifications), and changes in the status of time-off requests (user and agent notifications). • Use the **Colors** module to configure the colors that WFM uses in the Supervisor schedule views. You can configure default values for these schedule items: **Work**, **Days Off**, **Meals**, **Breaks**, **Activity Sets**, **Exceptions**, **Time Off**, and **Marked Time**. You can also configure specific colors, by site, for different types of: **Activity Sets**, **Exceptions**, **Time Off**, and

	Marked Time. • View, create, update, delete, and manage **Shared Transport Groups**. • Configure Agent properties **Activities**, **Time Off**, **Time-Off Bonuses**, and assign **Time-Off Rules**, **Time-Off Types**, **Contracts** or **Rotating Patterns** to them. • Configure **Business Units** and **Sites**. • Configure **Time-Off Bidding Periods**. • Configure **Schedule State Groups** and **Adherence Rules** • Configure **Activities** • Configure **Users** (supervisors and other persons who are not agents) • Configure **Roles** (security roles and privileges)
Calendar Module	Explains how to view, add, edit, and delete preplanned items, such as exceptions and preferences; how to grant or decline these items; and how to set time-off limits.
Forecast Module	Explains how to make workload and staffing predictions for one or more sites.
Schedule Module	Explains the schedule views and how to make real-time adjustments to the schedule. Includes these bidding views: • Overtime Bidding View—Explains the overtime bidding process, including: creating an overtime offer, bidding by agents, bid resolution and publishing to the **Master Schedule**. • Schedule Bidding View—Explains the schedule bidding process, including: creating a scenario, bidding by agents, bid resolution and publishing to the **Master Schedule**.
Trading Module	Explains how to review, and approve or decline, agents' proposed schedule trades.
Performance Module	Explains how to view actual site performance compared with planned performance, using such key indicators as Service Level and Average Speed of Answer (ASA).
Adherence Module	Explains the real-time agent adherence views, which include both table and graph options.
Reports Module	Lists all of the reports available in WFM Web for Supervisors, and details the information included in each report.
About Window	Displays the release number and copyright

	information for this release of WFM Web.

Printing This Online Help

If you prefer to print the Help rather than use it online, complete the following steps:

1. In the **Navigation** pane on this page, at the bottom of the **Table of Contents**, click **PDF Version**.
2. When the dialog opens, select:
   - **Open with** to select the application, with which you want to view and print the Help.
     Adobe Acrobat v9 is recommended.
   - **Save File** to save the Help to a folder on your computer.
     When the download is complete, navigate to the folder that contains the saved .pdf file, open and view the file on your computer offline.
3. Use the Print function in your application to print the document.

About WFM Web

The About window displays when you select the **About** button, which is found in the top right corner of WFM Web window, near the **Log out** button. The About window displays the copyright information, Settings... button, and the Workforce Management (WFM) Web Server version.

Java Plug-In Support in Browsers

Since Oracle deprecated Java Web Start in Java SE 9 and discontinued support in Java SE 11, WFM introduces its UI Launcher, enabling users to run Web for Supervisors Java-based views in the same browser session, as they always have. To use the UI Launcher, you must install Java on the computer that is running WFM Web. The Java folder must be set to either the `PATH` or `JAVA_HOME` environment variable. If it is set to both, the value is taken from `JAVA_HOME`.

> **Tip**
>
> The UI Launcher is also compatible with OpenJDK. If OpenJDK is set up simply by unzipping the Java files, neither of these variables are set automatically and you must set the Java folder to `PATH` or `JAVA_HOME` manually.

Deploying the WFM UI Launcher

To use the WFM UI Launcher:

1. Log in to the Web for Supervisors application.
2. At the **Home** view, click **About**.
3. Below **Settings...**, click **Download UI Launcher**.
4. When the download dialog opens, click **Save File**.
5. Save the file in a folder on the local computer.
6. After unzipping the files, run `assoc-add.bat`.
   This associates the *.wfm files with the launcher.
   The WFM UI Launcher is now ready to use.
7. At the **Home** view, click **About** > **Settings...**
8. Click the **Type** column header to sort the column until the **ENUM** type setting appears at the top.
   This enables you to find RUN_JAVA_STANDALONE quickly.
9. In the **Value** column, click to open the drop-down list and select **UI Launcher**.
   WFM uses the UI Launcher as the default application to open `.wfm` files in the same session.

You can select one of three values for **RUN_JAVA_STANDALONE**:

- **Off (Plug-in used)**—If selected, WFM uses the Java plug-in inside the browser to open the Web for Supervisor Java-based views.
- **Java Web Start**—If selected, WFM Web does not attempt to start the Java applet, but generates and downloads the `wfm.jnlp` file, which launches automatically. However, you might have to save it to your hard drive and start it as you would any other application. It then starts as a standalone Java Web Start application, containing Java-based supervisor views.
- **UI Launcher**—If selected, WFM Web does not attempt to start the Java applet, but generates and downloads the `start.wfm` file, which launches automatically. However, you might have to save it to your hard drive and start it as you would any other application. It then starts as a standalone application, containing Java-based supervisor views.

If you select either **Java Web Start** or **UI Launcher**, see the limitations below.

Limitations: Browsers That Do Not Support Java Plug-Ins

If you enable the **RUN_JAVA_STANDALONE** setting to use a standalone Java Web Start or the UI Launcher, take note of the following limitations:

- You cannot use the `wfm.jnlp` or `start.wfm` file to start the Web for Supervisors views at any time. The file is valid and launches the application only if the user's session, from which the file was downloaded, is active. After the user logs off or the session expires, the (separate) Java and Launcher applications stop working too. Therefore, you must keep the browser window (from which the `wfm.jnlp` or `start.wfm` file was downloaded) open for the duration of work and remain logged in.
- If the local settings in **About** > **Settings**... are changed, you must download the `wfm.jnlp` or `start.wfm` file again and restart before the changes take effect.

Changing GUI colors and font size

WFM Web for Supervisors uses other indicators besides color to highlight a change or status, but you can customize many elements in the GUI by changing the color.

1. Click **About** > **Settings...** to display the **Settings** page.
   The Settings page has one setting displayed on each row and can be scrolled up or down.
2. Optional: Click **Sort** to open a drop-down list and choose one of four sort options: **Setting**, **Description**, **Type**, or **Value**; or click any column heading to sort by the list in ascending or descending order.
3. Click any row in **Settings...** that is of type **COLOR** to display the **Color Palette** pane.
4. The **Color Palette** pane has five fields: **RED**, **GREEN**, **BLUE**, **HUE**, and **COLOR (#)**, which show the numerical values for the chosen color in the palette.
   The palette corresponds to the standard Windows-style color picker.
5. Click **Apply** after you have made your changes, and then **Close** to close the color picker.
6. Optional: To change the **Text Size Settings**, select one of four radio buttons; **None**, **+1**, **+2**, or **+3**.
7. Optional: Select the **Use High Contrast Theme** check box to display all color choices in high contrast, the next time that you log in to WFM Web.
8. Click **Save Changes** and exit the **Settings...** page.
9. Optional: Click **Restore default value** to abandon your changes.

More WFM Web Application Settings

In addition to GUI color settings, there are other settings in **About** > **Settings....** that affect allow you to customize WFM Web application functionality:

- **ACCESSIBILITY_COMPATIBLE**—If checked, WFM Web runs in accessibility mode. If the check box is cleared (default), WFM Web does not run in accessibility mode.
- **CFG_SHOW_TERMINATED_AGENTS**—If checked, WFM Web shows terminated agents and agents with hire dates set in the future in lists or tables. If the check box is cleared (default), WFM Web hides terminated agents and agents with hire dates set in the future, and they cannot be viewed in lists or tables.
- **FRC_STAFFING_USE_MANHOURS**—If checked, WFM Web shows staffing totals in person-hours instead of full-time equivalents. If the check box is cleared (default), WFM Web shows staffing totals in full-time equivalents.

WFM Agent Mobile Client Support

In addition to the WFM Web for Agents desktop interface, WFM Web includes the Agent Mobile Client web interface, which is optimized for mobile devices. To access WFM Web for Agents on their mobile devices, agents can use the same URL that they use to gain access to the Agent UI on their desktop.

Agents can use the latest supported version of Safari on their iOS devices and the latest supported version of Google Chrome on their Android devices.

Advise agents that their browser screen's *actual* resolution must be at least 320 by 550. WFM does not support anything less than either dimension.

Screen Reader Support

WFM Web for Supervisors supports screen readers for vision-impaired users, with keyboard, focus and screen reader ToolTip support throughout the WFM Web for Supervisors interface. Every menu item and on-screen command can be reached by using the keyboard (and so, can also be reached using a screen reader).

In addition, the Accessible Schedule Details dialog box simplifies and organizes commands for vision-impaired users and the screen readers that they use, in these views:

Schedule > Schedule Scenarios > Scenario Agent-Extended view

Schedule > Schedule Scenarios > Scenario Intra-Day view

Schedule > Master Schedule > Master Schedule Intra-Day view

Schedule > Master Schedule > Master Schedule Agent-Extended view

> **Tip**
> WFM Web was improved to allow supervisors to use Java-based views on browsers that do not support Java plug-in, like Chrome. See the RUN_JAVA_STANDALONE Web Application setting below.

Glossary of Abbreviations

The acronyms and abbreviations that appear on Workforce Management screens and throughout the document appear as links that reference a glossary containing definitions for these terms. You can view definitions by clicking the link (in bold red) and it will open in a pop-up window on the page you are viewing. For example, average handle time.

Also, see the entire Genesys Glossary.

Getting Started

> **Tip**
> WFM has a new interface for the Forecast module. If you are using the new Supervisors interface and have landed on this page by accident, see the "Getting started" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

Site supervisors can use a web browser to log in to Workforce Management Web for Supervisors (WFM Web) and perform the following tasks:

- View, add, edit, and delete agent preferences and exceptions.
- Set time-off limits.
- Forecast staffing requirements, based on service objectives and historical data.
- Schedule agents and teams for multiple activities, and make real-time schedule changes.
- Create a bidding scenario with profile agents, which real agents can use to bid on their favorite schedules.
- View, and approve or decline, agents' proposed schedule trades.
- Configure **Schedule State Groups** and **Organization** objects, such as **Business Units** and **Sites**,
- Configure **Activities** properties.
- Configure policies for **Exception Types**, **Time-Off Types**, **Time-Off Rules**, **Meetings**, **Marked Time**, **Shifts**, **Contracts**, and **Rotating Patterns**.
- Monitor real-time site performance.
- Review agents' real-time adherence to their scheduled status.
- Generate reports that show schedule and performance information.
- Configure email notifications.

Screen Resolution and Multiple Browser Windows

- WFM Web is optimized for a screen resolution of at least 1024 x 768. At lower resolutions, some elements (such as table headers) might not display correctly.
- If you are using Mozilla Firefox, Genesys recommends that you not run WFM Web in more than one browser window on the same workstation, because doing so can cause the application to behave in unexpected ways.
- If you are using Internet Explorer, Genesys recommends (for the same reason) that you not open a second browser window on the same WFM Web session by selecting **File** > **New** or pressing **Ctrl+N**.

However, starting a separate WFM Web session by launching a separate Internet Explorer browser thread does not appear to cause this problem.

Security Features

WFM Web includes security features that prevent unauthorized access to information:

- You can view and make changes only to those modules (such as **Calendar** or **Schedule**) and objects (such as sites) for which you have security access. You cannot access other modules or objects.
- Configuration and security options enable you to restrict access to agents' personal information, such as wages.
- Agents use a separate application (WFM Web for Agents), which enables them to view and change their own information. They have limited access to other agents' schedule information, but only if schedule trading is enabled at your site. Agents can also access this application on their Android, smartphone, or other mobile device if the supervisor provides the URL.

Accessibility

To run Web for Supervisors with accessibility tools like JAWS, set the ACCESSIBILITY_COMPATIBLE Web Application setting to `true` in the **About** > **Settings..** dialog. Otherwise, WFM Web for Supervisors could freeze, or display adverse or unexpected behavior while screen readers like JAWS are being used.

Setting the Clock

WFM Web for Supervisors picks up the regional settings from the local computer. You may wish to change this if, for example, WFM Web appears in a 12-hour format and you want to view a 24-hour format.

> **Tip**
> WFM Web for Agents picks up the regional setting from the server where the WFM Web application is running—not from the agent's computer.

Links to Further Information

Log In	Explains how to start your WFM Web session.
The Supervisors Window	Explains the layout and functions of the WFM Web controls.

Policies	Explains how to configure the following policies: Exception Types, Meetings, Time-Off Types, Time-Off Rules, Marked Time, Shifts, Contracts, and Rotating Patterns.
Configuration	Explains how to configure Shared Transport, Agents, Organization objects, such as Business Units, Sites, and Time Zones, Schedule State Groups and Activities. Notifications explains how to configure email notifications. Colors explains how to configure the colors that WFM uses in the Supervisor schedule views.
Calendar	Explains how to view, add, edit, and delete preplanned items, such as exceptions and preferences; how to grant or decline these items; and how to set time-off limits.
Forecast	Explains how to forecast staffing requirements based on projected interaction volumes and service objectives.
Schedule	Explains how to build, view, share, edit, and delete published and unpublished schedule scenarios.
Schedule Bidding	Explains the schedule bidding process, including: creating a scenario, bidding, bid resolution and publishing to the Master Schedule.
Trading	Explains how to view, and approve or decline, agents' desired schedule trades.
Performance	Explains how to view actual contact center performance compared with planned performance based on key indicators such as Service Level, Average Speed of Answer (ASA), and Abandonment.
Adherence	Explains how to view agents' real-time adherence to their schedules in both tabular and graph formats.
Reports	Explains how to generate, view, print, and export predefined WFM reports.
Log Off	Explains how to end your WFM Web session.

Logging In

Before you can log in to Workforce Management (WFM), you must have the WFM Web URL (address). In some contact centers, the Log in page might already be set up for you and you can simply enter your username and password. If this is not the case, ask your administrator for the WFM Web URL. After typing it into your browser, WFM displays the splash screen for the Log in interface.

> **Tip**
> WFM has a new interface for the Forecast module that you can access after logging in to Web for Supervisors (if you have the appropriate access rights). To use the new interface, see Opening the new Forecast UI Also, see *Workforce Management Supervisor Help*, which describes the new Forecast module.

Logging in to Web for Supervisors

To start using WFM Web:

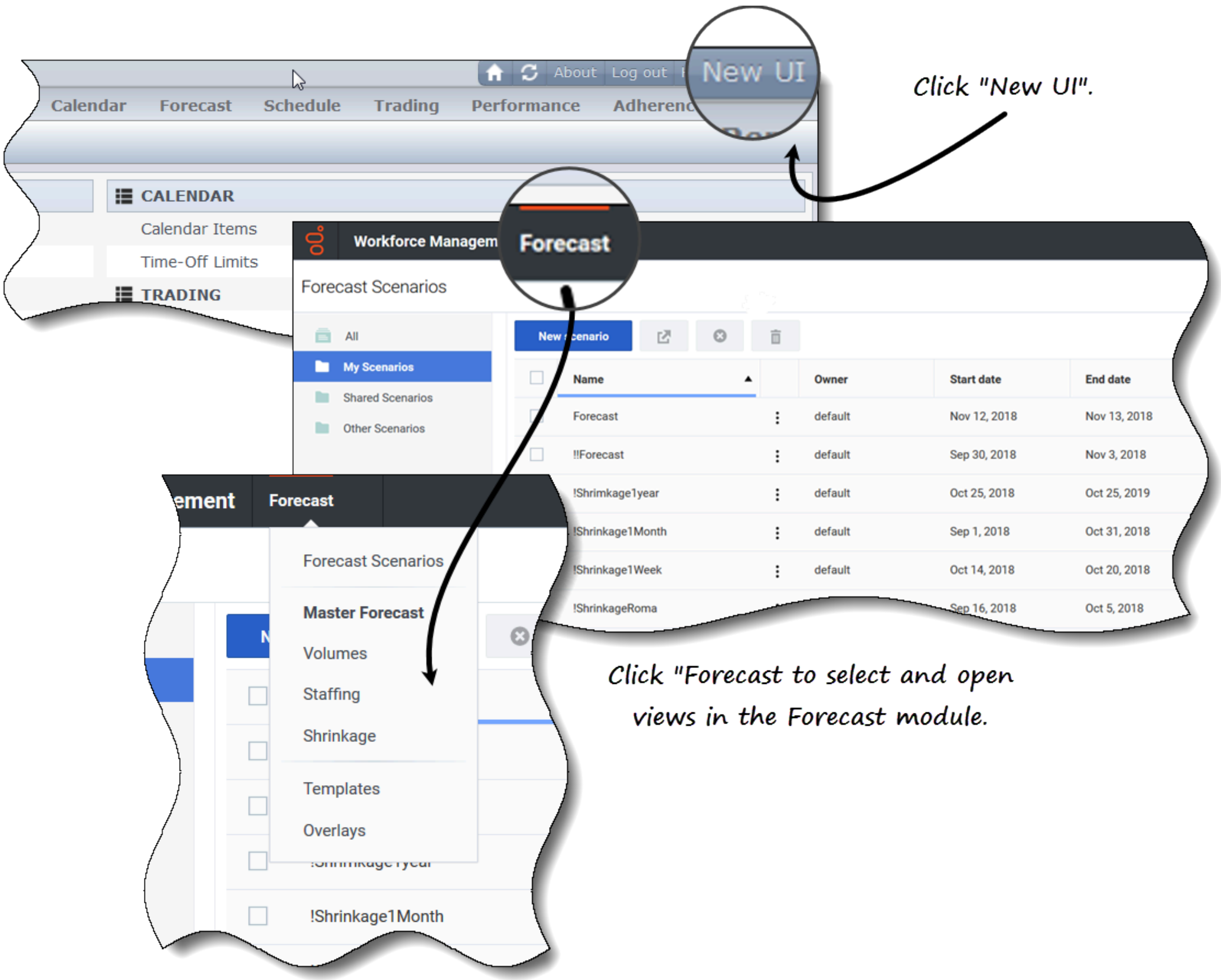
1. Obtain the WFM Web URL (address) from your administrator.
2. Open a web browser.
3. Type the WFM Web URL into your browser's address bar and press **Enter**.
   The Log in window appears.
4. Enter your user name and password.
5. Click **OK**.

If WFM Web validates your user name and password, he Web for Supervisors (Classic) Home view opens. If WFM Web cannot log you in, it displays an error message indicating the problem. Either click **Login** to try again (for example, if you think that you misspelled your user name or password), or click **Show error details**.

> **Important**
> Multiple Supervisors using the Firefox web browser cannot be logged in to the same host at the same time.

Opening the new Forecast UI

Depending on how WFM Web is set up in your contact center, you might or might not see the option to open the new Forecast module. If you require access and do not see this option, contact your administrator.



To open the new Forecast user interface:

1. First, log in to the Supervisor (Classic) interface. See the procedure above.
2. In the top-right corner of the classic **Home** view (or any other view), click **New UI**.
   The new Forecast UI opens.
3. Click **Forecast** to open the drop-down menu containing a list of views in the Forecast module.
4. Select a view from the list to open it.

The new Forecast UI is described in the *Workforce Management Supervisor Help*.

System Login Timestamp

The timestamp information from the previous login is displayed in the WFM Web GUI the next time you log in through the Supervisor interface, alerting you to any unauthorized use of your login credentials.

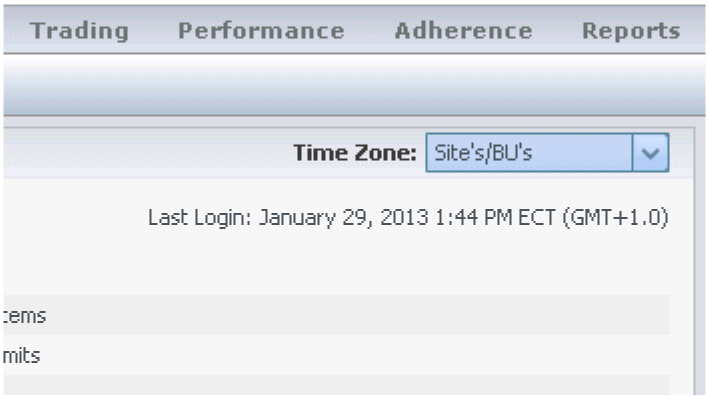


Figure: Web for Supervisors Login Timestamp

If you do not set the timestamp to the browser time zone, the time zone for the location at which you log in is used in the timestamp. The timestamp is displayed in the top-right corner of the **Home** page, below the list of modules and breadcrumbs bar.

Date Selectors

Many WFM Web modules and views have common date-selection controls to modify the date(s) displayed in them. The following sections cover:

- Selecting a start date.
- Jumping to other dates by opening the monthly calendar.
- How WFM Web automatically selects the first workday in weekly views.

Selecting the Start Date

Where available, the date-selection controls appear at the right edge of the toolbar. These controls function as follows:

<	Click this button to move the start date back one interval (day, week, or schedule planning period—depending on the context).
Date:	Type a date into this date box to directly edit the start date. (The sequence of month, day, and year digits depends on your operating system's regional settings.) You can also use the up or down arrow to modify the displayed date.
...	Click this button to open the monthly calendar.
- [End Date]	For views that display more than one day's information, the end date appears (but cannot be edited) here.
>	Click this button to move the start date forward one interval (day, week, or schedule planning period—depending on the context).

Selecting the Month

The calendar shows one calendar month. You can use the calendar's controls to:

Select a new start date:	Click a date. (The calendar closes, adjusting the current module or view to your selected start date.)
Jump forward or backward one year:	Click the small up or down arrow to the right of the year text box.
Jump to a specific year:	In the year text box, select and retype the digits that you want to replace. (Green digits remain

	editable; press Enter to lock the new year, which turns the digits black.)
Jump forward or backward one month:	Click the small up or down arrow to the right of the month name.
Jump to a specific month:	Click the month name, and then click a different month in the drop-down list that appears.

Colors in the calendar have the following meanings:

Dark gray square:	Currently-selected start date.

Weekly Views: Automatic Start Day Selection

In weekly views, if you enter a date other than the first weekday, the view automatically adjusts to start with the first weekday.

If the `WeekStartDay` setting has been specified (in the Business Units > Properties tab), the first weekday is the one specified in `WeekStartDay`. Otherwise, the first weekday is the one specified in your operating system's regional settings.

Finding Agents in Tables

In a number of Workforce Management (WFM) Web windows, you can search for particular agents by using the **Find Agent** dialog box. To open it, select the table you want to search and then either:

- Select **Find** from the **Edit** menu.
- Press **[Ctrl] + F**.

You can search for agents in these windows:

- The **Calendar** main window.
- The table in the **Schedule Scenario Weekly View** and **Master Schedule Weekly View**. Select a cell in the **Agent Name** column to activate the **Find** command.
- The table in these views:
    - Schedule Scenario Agent Extended
    - Schedule Scenario Intra-Day
    - Master Schedule Agent Extended
    - Master Schedule Intra-Day

To search for one or more agents:

1. In the **Find Agents** dialog box, type either the full name for which you are searching or its first few letters.
2. Select the **Last Name** or **First Name** radio button.
3. Click **Find**.
   The table that you are searching now shows the first agent listed whose name matches the search string that you entered. A message box informs you if there are no agent names that match your search criteria.
4. Click **Find** again to find the next agent whose names matches the string you entered. You can search as many times as you want.
5. When you have finished searching, click **Close**.

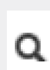
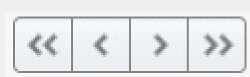
Displaying Terminated Agents in Tables

You can enable WFM to display terminated agents wherever agents are displayed in lists or tables in the **Schedule**, **Calendar**, **Trading**, **Adherence**, **Policies**, **Configuration**, **Reports** views. By default, WFM does not display terminated agents.

To change the default, see the `CFG_SHOW_TERMINATED_AGENTS` setting in **About** > **Settings...**

The Supervisor's Window

The panes in WFM Web for Supervisors display some combination of the controls described below, depending upon selections that you make in the Object pane. For more information, see the description of the Get Data button in the table below.

Generic buttons	The following buttons appear at the top right of every WFM Web window:
	**Home** displays the Home view, which is a list of all View menu options that is organized by tab.
	**Refresh** applies to the current view.
About button	**About** displays information about copyright and the current version information.
Logout button	**Logout** closes WFM Web, without confirming your choice if there are no changes to save.
	**New Page** displays a new web page of WFM Web. Default view is Home.
Help button	**General Help** displays WFM Web help at the Overview topic.
	**Contextual Help** displays WFM help at the current topic.
	**Search** enables you to enter search criteria to quickly find the object you are looking for. The criteria you enter will depend on which pane you have open.
	**Sort** enables you to sort lists to easily find the items you are looking for. The sorting criteria will vary, depending on which pane you have open.
	**Paging controls** enable you to browse the previous and next pages or navigate to the first and last items in the data set (start and end of the list), by clicking the appropriate arrow button in the view. To navigate between pages, you can use the **Up**, **Down**, **Page Up**, and **Page Down** keys on the keyboard.
Modules	Click to open each WFM module: **Configuration**, **Policies**, **Calendar**, **Forecast**, **Schedule**, **Trading**, **Performance**, **Adherence**, and **Reports**.
Breadcrumb navigation	WFM for Supervisors uses the same type of "breadcrumb navigation" as you see in Windows 7 directories and across the top of some web browser windows. Click any link in this display to choose from a drop-down menu and make a selection within that branch of the currently selected module. For example, the following breadcrumb navigation path will display a specific schedule

	scenario for the currently selected date: **Home > Schedule > Scenarios > Q4-2010 > Q4-2010 Intra-day**
Edit Menu (**Copy**, **Cut**, **Paste**, **Find**)	Each of these commands becomes enabled when it can be performed on the currently selected object.
Actions Menu	Select from a list of view-specific commands. This menu's contents change as you move among modules and views, and they match the command icons that appear on the toolbar.)
Actions Toolbar	These buttons correspond to the commands on the **Actions** menu. Hover your mouse pointer over a toolbar button to see a tool tip that displays the button's name.
Objects Pane	This pane offers several different display schemes, depending on the current selection of tab and menu item: **Tabs:** module-specific item trees under separate tabs One tree: **Business Units (BUs) > Sites** One tree: **BUs > Sites> Activities** Upper tree: **BUs > Sites> Teams > Agents** Lower tree: **BUs > Multi-site Activities > Activity Groups > Sites > Activities** When there are two selecting items in either of these two trees, it triggers an automatic selection of corresponding items in the other tree. At the site level, you may see a team in the tree labeled <None>. This node lists any agents that are assigned to the site, but not assigned to a team. If all agents in that site are assigned to a team, then the <None> team is empty. The only exceptions to this hierarchy are when **Scenarios** is selected or when you use the **Configuration** or **Reports** modules. Clicking an object in a tree (or clicking its expand/collapse control) displays the object's contents below it, indented slightly. When you have displayed the desired object, double-click it (or click it once, and then click **Get data**) to open the selected view for that object. Where the Objects tree displays check boxes, you can usually select / deselect multiple objects by selecting ( ) / clearing ( ) their check boxes, respectively. Certain views do not display check boxes; in this case, you can select multiple objects by clicking the group of objects while pressing the **SHIFT** or **CTRL** key. Some views and windows allow you to select only a single object.
Expand/Collapse Controls	Wherever you see the icon in a tree or other control, you can click it to see an expanded view of the adjacent item's contents or details. The icon indicates an expanded item. Click it once to collapse the item's contents and see more parallel items.
Working Pane (or **Data Pane**)	The right pane of the window displays data and controls that correspond to your selected module and view. Some views display graphs with an explanatory legend below them.

Action Buttons	View-level action buttons within the working pane provide controls that are specific to particular views (for example, apply or cancel). The **Get data** button  , when present at the lower left below the Objects tree, refreshes the display with current data from the database. Tip Not all modules use the **Get data** button. If there is no **Get data** button, the view is automatically updated with the new data every time that you change your date or object selection.
Status Bar	The status bar, at the very bottom of the window, displays messages about WFM Web's current state. (In some views, it displays the most recently generated warning or error message.)

Retrieving Lists of Items in Segments

The list of items or objects (such as **Agents**, **Shifts**, **Profiles**, **Activities**, **Schedule States**, **Contracts**, and **Rotating Patterns**) in a pane is displayed in segments or sequential pages. When large amounts of data are being retrieved, the list of items in the pane is displayed in smaller segments sequentially, with 50 items per page. This limits the number of items that are retrieved from WFM at any given time, maintaining optimal performance during retrieval. See Paging controls.

Changing the Font Size in the Browser

There are two ways to change the font size in the browser:

1. On the keyboard, hold the down the **Ctrl** button and scroll up to make the font larger or down to make it smaller.
   Use this method to change the font size of the breadcrumbs and modules in WFM Web for Supervisors, such as **Rotating Patterns**, **Contracts**, **Organization**, **Schedule State Groups**, **Shifts**, and **Activities**.
2. Select **About > Settings** and use the **Text Size** slide bar to adjust the text.
   Use this method to change the font size of the all modules, except the new modules (see the list above).

Customizing Table Views

Many WFM Web views include on-screen tables. You can typically customize the display of these tables in one or both of the following ways:

Resize Columns	In the table's header row, place your mouse pointer over the separator between two column headers. When you see a two-headed arrow, click and drag the column separator to adjust the column widths.
Sort by Column	In some tables, you can sort the data according to one of the displayed columns. Specify the column by clicking its header. You can change the sort order by clicking the header again. An upward-pointing arrowhead in the header indicates ascending order. A downward-pointing arrowhead indicates descending order.

If the **Agent** column is specified as the sort key, in ascending order, it will read: **Agent ^**

Logging Off

You should always log off when you have finished using WFM Web.

Important

If you do not log off, other users of your workstation might be able to view your account information.

To log off from any WFM Web view:

1. Pull down the **File** menu.
2. Select **Logoff/Login**.

WFM Web logs you off and the login screen appears. Another user can log in or you can now close the browser.

Policies

Policy objects are the rules that govern the work schedules of contact center agents. These rules are defined as policy objects for each site; WFM considers them when making forecasts and setting up schedules.

> **Important**
> To configure objects and change settings in the **Policies** module, you must have the appropriate role privileges. See Policies Role Privileges.

WFM Web for Supervisors includes the following policy objects:

- Exception Types—Defined periods of time when agents are engaged in noncontact work or are absent, such as during meetings or on days off.
- Time Off Types—Various types of time off, such as vacation, sick leave, and holiday. This module enables you to configure various time-off types and associate them with time-off rules.
- Time-Off Rules—The rules that govern accrued time off, and how awarded time off is granted. This module enables you to configure time-off rules for multiple time-off types or a single time-off type.
- Meetings—A period set aside for a specific activity, such as a meeting or training, attended by multiple agents.
- Marked Times—Periods that you can designate as requiring special tracking. For example, you might have an agent who works extra hours on a particular day, but the extra hours do not count as overtime. You can mark those hours to track and report on them.
- Shifts—Defined periods of time when agents are assigned to work activites. Shifts define workday parameters by time of day, duration, and days of the week.
- Contracts—Settings for agent availability times and days off that might be union or contractual requirements. WFM automatically takes these settings into consideration during scheduling to produce legal schedules for every agent.
- Rotating Patterns—Rotating work weeks of shifts, working days, working hours, and/or work activities. A rotating pattern can be assigned to an agent.

Watch the Video

- Creating Exception Types
- Creating Time-Off Types
- Creating Time-Off Rules
- Creating Meetings
- Filtering Agents by Activities

- Creating Marked Time

Exception Types

Exception types define periods of time when agents are engaged in non-work activities, such as training or meetings. Each site configures its own set of exception types, based on its business requirements.

Creating Partial-Day Exceptions

Scheduler evaluates partial-day exceptions to see whether they are **Valid** or **Invalid**. Valid partial-day exceptions comply with the criteria that are listed in **Exception Type Properties** (below).

Partial-day exceptions must:

- Not conflict with a full-day exception or granted preference.
- Fall entirely within the agent's availability pattern as specified in the **Contract** module and (if applicable) within granted availability preference hours.
- Fall entirely within activity hours of operation for activities the agent can perform.
- Fall entirely within at least one compatible shift's start and end times and be compatible with the meal settings for that shift.
- Not overlap the start or end time for another partial-day exception.

Exceptions with Payback

WFM supports exceptions with payback to enable agents to make up for work time lost due to lateness events or personal appointments. If agents in your contact center are given appropriate permission to use this feature, they (and you) can insert payback exceptions into an existing schedule.

You can insert these exception types when modifying individual agent schedules. See the Insert Exception with Payback Wizard in the **Schedule** > **Intra-Day** view. Agents can insert payback exceptions in the **My Schedule** or **My Schedule Details** view. See Adding Exceptions To Your Schedule in the *Workforce Management Agent Help*.

Using Time-Off Types Instead of Exception Types

The standard exception types that WFM creates when you choose the **Generate Default Schedule State Groups and exception types** while importing a site include several that represent various types of time off. These exception types, and the **Exception is Used as Time Off** setting, are included for backward compatibility only.

For example, the standard exception types include **Time Off**, **Holiday**, **Sick Day**, and **Personal Day**. These time-off exception types are comparatively inflexible and cannot be associated with time-off accrual rules. For this reason, time-off types are the preferred way to configure the various kinds of time-off periods you use.

Genesys recommends that you configure all types of time off using the **Time-Off Types** module instead of configuring them as exception types.

> **Tip**
> Supervisors can also enter time off as preferences in WFM Web's **Calendar** module.

Trade Rules Associated with Exception Types

You can change which trade rule is associated with a specific **Exception Type**, but you cannot edit or delete a **Trade Rule**.

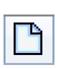
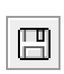
Creating Exception Types

Link to video

To create exception types, watch the video and/or follow this procedure:

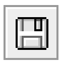
1. In the **Policies** module, select **Exception Types**.
2. In the **Objects** pane, select the site(s) or business unit with which the new object will be associated.

   > **Tip**
   > You can select multiple sites (just keep clicking on them) but only one business unit.

3. Click **New**  .
4. Configure the new object on each of the **Properties** and **Associated Sites** tabs.
5. When you are finished, click **Save**  .

Editing Exception Types

To edit exception types:

1. Select the exception type in the **Exception Types** pane.
2. Make the necessary changes. See Exception Types **Properties** tab to find out how to configure these settings.
3. Click **Save**  .

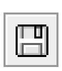
Deleting Exception Types

To delete exception types:

1. Select the exception type in the **Exception Types** pane.
2. Click **Delete**  .

Copying Exception Types

To copy existing exception types:

1. In the **Exception Types** pane, select the exception type you want to copy.
2. Click **Copy**  .
3. When the **Copy Exception Type** pane opens, enter a name for the exception type.
4. In the bottom half of the pane, click the **Enterprise** list and select the business unit, to which you want to associate this exception type.
5. Click **Save**  .

   Alternatively, click Close  to close this pane and cancel the action. If you do this, the exception type is not copied.

Exception Types Settings

You can configure settings in two tabs in the **Exception Types** view (after clicking **New**  or selecting an existing exception type):

- Properties Tab
- Associated Sites Tab

Properties Tab

- **Exception Type Name**—Each exception type should have a descriptive name. The name must be unique within all sites associated with the exception.
- **Short Name of Exception Type**—To be used in graphical representations of the exception in **Calendar** and **Scheduler**, and can be up to three characters.
- **Exception Usage**—Select one of the following radio buttons:
    - **Regular**—An ordinary exception.
    - **in Meeting Planner/Scheduler**—This exception will be used to configure a meeting and will be inserted into the schedule when the meeting is scheduled.
    - **as Time Off**—The exception duration is counted against the Time-Off balance.

> **Important**
> The **Exception Used as Time Off** property does not use any other time-off rules or settings (including time-off limits). The ability to use an exception as time off is intended for legacy purposes only, for customers who have previously created exceptions to use as partial-day time off. Genesys recommends that users set up time-off types that they can use for both full-day and partial-day time off, and that they no longer use exceptions to represent partial-day time off.

    - **Convertible to Day Off**—Select this check box to instruct **Scheduler** to convert a full-day exception to a day off, if that is necessary for consistent scheduling. The day off is counted towards **Preference Fulfillment**.

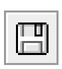
> **Important**
> Selecting this check box disables and checks the property **Exception Is Exclusive for the Whole Day**.

- **Exception Type Is Paid**—If the check box is selected, the exception is paid. If cleared, it is unpaid.
    - **Allow Breaks and Meals during Exception**—Select this check box to allow breaks and meals

during the currently selected exception. Default setting: cleared. Disabled if the current combination of selected exception properties does not allow breaks. (Enabled only if **Exception Type is Paid** is selected.)

- **Exception Is Exclusive for the Whole Day**—This exception occupies the entire day.
- **Trade Rule**—Indicates how this exception should be treated if an agent who is assigned this exception is involved in a schedule trade. From this drop-down list, select possible values are **Delete**, **Do Not Trade**, **Keep with Agent**, and **Keep with Schedule** (default).
- **Agent Initiated**—Select this check box to allow an Agent to initiate this **Exception type**. Default: cleared.
    - **Specify Dates**—Select this check box to set the start and end date for the exception. This check box is enabled only when the **Agent Initiated** check box is selected.
    - **Start Date**—Select to specify the start date of an allowed range for this exception type. Then enter the month, day, and year manually, or click the down arrow to select the date from a drop-down calendar. The default is the current date.
    - **End Date**—Select to specify the end date of an allowed range for this exception type. Then enter the month, day, and year manually, or click the down arrow to select a date from the drop-down calendar. The default is the current date.

Associated Sites Tab

1. Select the check box of each site to associate with the current exception type.
2. Clear the check box of each site to disassociate with the current exception type.
3. Click **Save**  .

On this tab you can associate an exception type with a Schedule State Group. The site's **Schedule State Groups** drop-down list is enabled when you check the site. It contains all of the Schedule State Groups under that site.

If a Schedule State Group with an associated **Fixed State Exception** exists for the selected site, this Schedule State Group is selected by default in the **Schedule State Group** drop-down list when you check this site. See the figure below.

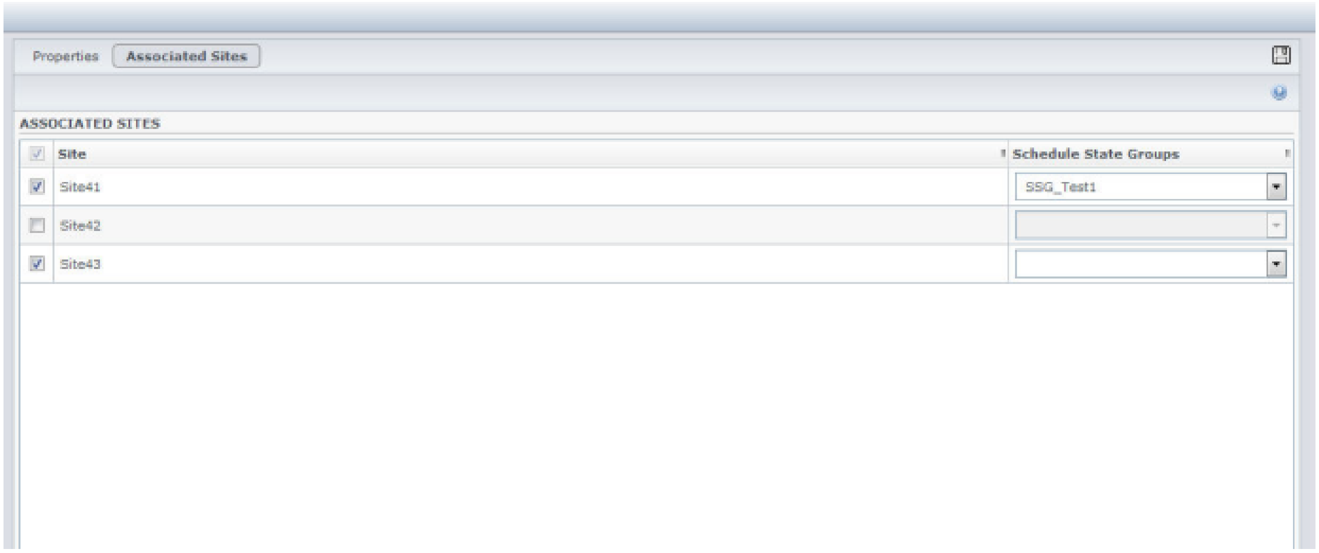


Figure: Schedule State Group drop-down list—Associated Sites tab

Time-Off Types

WFM enables you to configure multiple types of time off. Examples of time-off types include vacation, sick leave, paid time off, holiday, and maternity leave.

By default, WFM creates the **Vacation** time-off type. This time-off type cannot be deleted and does not belong exclusively to any site.

You can configure a time-off rule for a one or multiple time-off types. When you configure multiple time-off types for the same rule, the time-off balance is calculated and accrued for all time-off types associated with that rule.

Use the procedures in this topic to create, copy, edit, and delete time-off types, and associate/disassociate time-off types with sites.

You assign time-off type/time-off rule combinations to agents by using the **Configuration** > **Agents** > Time Off pane.

Creating Time-Off Types

Link to video

To create a time-off type, watch the video and/or follow the steps in this procedure:

1. In the **Policies** module, select **Time-Off Types**.
2. In the **Objects** pane, select the site(s) or business unit with which the new object will be associated.

> **Tip**
> You can select multiple sites (just keep clicking on them) but only one business unit.

3. Select **New** () from the toolbar.
4. Configure the new object on the Properties tab and the Associated Sites tab.
5. Click **Save** when you are finished.

Editing Time-Off Types

To edit a time-off type:

1. In the **Time-Off Type** pane, select a time-off type.
2. Select the Properties tab and/or the Associated Sites tab and make the changes.
3. Click **Save**.

> **Tip**
> You cannot edit a time-off type that is used in the **Calendar** or **Meeting Planner**.

Deleting Time-Off Types

To delete a time-off type:

1. In the **Time-Off Type** pane, select a time-off type.
2. Select **Delete**  from the toolbar.

> **Tip**
> You cannot delete a time-off type that is used in the **Calendar** or **Meeting Planner**.

Copying Time-Off Types

To copy a time-off type:

1. Select an existing time-off type from the list.
2. Click **Copy**  from the toolbar.
3. Rename and associate the time-off type with a Business Unit.
4. Click **Save** when you are finished.

Properties Tab

- **Name**—This name should be descriptive and must be unique within the site.
- **Short Name**—The short name of the time-off type can be up to three characters.
- **Time-Off Type is Paid**—Select this check box if the time-off type is paid.
- **Counts Toward Time-Off Limits**—Select this check box if WFM should apply time-off hours of this type to the time-off limits that you set in the WFM Web for Supervisors **Calendar** module. If you clear this check box, no time-off limits are applied to this time-off type.
- **Trade Rule**—This controls whether agents can trade schedule periods that include time off of this type. For example, a paid-time-off day normally stays with the agent, whereas training may stay with the schedule (any agent who is working that shift would attend that training). The selections are:
  - **Delete** (deletes the trade proposal)
  - **Do not trade** (denies the trade proposal)
  - **Keep with agent**
  - **Keep with schedule** (default).

Associating and Disassociating Sites

1. Select a site's check box to associate it with the current time-off type.
   - In the **Schedule State Group** drop-down list, select the group that will be associated with this time-off type.
2. Clear a site's check box to disassociate with the current time-off type.
3. Click **Save**.

When associating sites, on the **Associated Sites** tab you can associate a time-off type with a Schedule State Group. The site's **Schedule State Groups** drop-down list is enabled when you check a site. It contains all Schedule State Groups under the selected site.

If a Schedule State Group with an associated **Fixed State Exception** exists for the selected site, this Schedule State Group is selected by default in the **Schedule State Group** drop-down list when you check this site.

Time-Off Rules

Time-off rules control how the agent's time-off hours are accrued/awarded and define the options for time-off requests. For example, you might set different accrual rates for paid time off depending on how long an agent has been employed.

Use the Time-Off Rules panes to:

- Create and edit time-off rules includes setting Properties and Rules for Requests
- Delete time-off rules
- Copy time-off rules
- Associate agents and time-off types with a time-off rule

You can configure:

- Multiple time-off rules for each time-off type
- A single time-off rule for multiple time-off types
- A single time-off rule for one time-off type

How Time-Off Rules Work

The following points explain how time-off rules work:

- Time off can be either accrued or awarded.
- If you change a time-off rule, the agent's carry-over time-off hours for that time-off type are calculated immediately, and the new rule applies from the time of the change. Time-off rules can change during configuration of the site, the agent, or the time-off rule.
- If agents with time-off rules for one or more time-off types are transferred to a different site during synchronization, the time-off rules associated with the agents remain, but they are no longer active. To enable agents to continue to accumulate time off, you must manually assign agents time-off rules for the new site. When WFM calculates carry-over for these agent, it calculates the time off at the old rate until the End Date and at the new rate from the End Date until the Carry-Over date.

> **Tip**
>
> Time-Off carry-over occurs automatically by default. You can turned it off in the WFM Server Application Options.

- If an agent becomes unassigned (is no longer associated with a site) he or she keeps the assigned time-off rules. However, WFM sets the date, on which the agent was removed from the site as the End Date, and time off is accrued, based on the rules from the former site only up to that date. The agent can continue to accrue time off, only if you assign the him/her to a site and assign another time-off rule.

- If an agent is unassigned from a time-off rule for any time-off type (by setting the End Date for this time-off rule) and is not assigned this time-off type by any other time-off rule (no other record exists with a Start Date for this time-off type) then the agent can request time off for this time-off type but the balance is no longer accrued.

Tip

To understand how time-off rules or constraints affect agent preferences, see Preference Statuses.

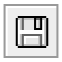
Configuring Time-Off Rules

The Time-Off Rules panes, which include Properties, Rules for Requests, and Assignments, enable you to create, edit, delete, and copy time-off rules, configure rules for requests, and assign time-off rules.

Creating Time-Off Rules

Link to video

To create a time-off rule, watch the video and/or follow this procedure:

1. In the **Time-Off Rules** pane, click **New**  .
   The Properties pane opens.
2. Configure the Time-Off Rules Properties, as required.
3. Click **Save Now**  .

Next Steps:

- Configure rules for time-off requests. See Rules for Requests and part 2 of this video series.
- Assign agents and time-off types to this rule. See Assigning Time-Off Rules and part 3 of this video series.

Time-Off Rules Properties

You can configure the following properties for Time-Off Rules:

- **Name**—Accept the default name or enter a different name. The name must be unique within the site.
- **Type**—Select one of two types:
  - **Accrued**—A certain number of time-off hours accumulate for each period worked.
  - **Awarded**—A set amount of time off given for the year.

  For example, paid time off is usually accrued, whereas holidays are awarded.

> ## Tip
> The Type field is enable only when the time-off rule is created. Thereafter, it is read-only.

- **Ignore accrual settings (resulting in unlimited balances, if this rule is used)**—Select this check box to disable:
  - All other controls in the **Properties** pane.
  - The Estimated daily paid hours and Estimated weekly paid hours in the **Rules for Requests** pane. Default setting: cleared (disabled).
    Use the default setting for special circumstances, such as sick days, that are subject to time-off limits but do not count against an agent's time-off balance.

> ## Tip
> The **Limit the total number of requested time-off hours, if** setting is related to time-off balances. It works for both awarded and accrued rules when WFM calculates the balance. When the **Ignore accrual settings (resulting in unlimited balances, if this rule is used)** setting is checked, WFM does not calculate the balance. Therefore, there's no limitation for the affected period. When both of these settings are checked, you might see the error message: *Agent has accrual rule but ignore balance check is selected.* To avoid this error, uncheck the **Ignore accrual settings (resulting in unlimited balances, if this rule is used)** setting and set a higher number of hours for the rule, instead of an unlimited balance.

- **Number of hours earned**—Enter the number of hours that can be accrued every period in the `hh:mm` format.
- **For every**—Enter a number for how often the specified hours are accrued and then select the unit for the number (hours, days, weeks, months, or years) from the drop-down list.

> ## Tip
> Awarded time off must be entered as x hours per `1 Year`. You cannot select any other period. Synchronization can affect an agent's time-off accrual. If agents with time-off rules for one or more types of time off are transferred to a different site during synchronization, the time-off rules remain associated with the agents, but they are no

> longer active. You must manually assign time-off rules that are configured for the new site to the agents.

- **Limit the time-off balance to the following value**—Select this check box to set a limit to the total number of time-off hours an agent can accumulate.
- **Hours that can be carried over to the next year**—Enter the number of time-off hours that can be carried over into the next yearly period. At carry-over, bonus and accrued time-off hours are combined and the allowed number of hours is carried over to the next year. Hours above the allowed carry-over number are deleted. The default number of carried-over hours is 0.

> ## Tip
> The current time-off period is determined either by the most recent carry-over date or, if no prior carry-over date exists, by the agent's date of hire. In cases where an agent has worked for several years with no carry-over calculation, time-off balances are calculated by taking into consideration each year the agent has worked. To apply bonus time-off hours to the current year, the agent must have had time-off carry-over calculated at the most recent carry-over date. If you have already applied bonus hours and the carry-over date is not current, you can perform a carry-over calculation, at which time the bonus hours will be converted to carry-over hours. When performing this update, make sure that the number of carried-over hours allowed is large enough to accommodate all bonus hours to be carried over.

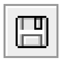
- **Hours that can be taken in advance per year**—Enter the number of time-off hours the agent can take in advance each year. These hours are offset by the hours accrued. This setting is disabled for awarded time-off rules.
- **Apply rule on hire date** (if not checked, rule becomes applicable after the period below, starting on the hire date)—Select this check box to specify that the agent accrues time off from the date of hire. If disabled, time off is accrued beginning on the date when time off can be requested as set in the **Time off can be requested after this period expires (after the hire date)** field.
- **Time off can be requested after this period expires (after the hire date)**—Enter the number of weeks or months the agent has to work after the hiring date before he or she can enter a time-off request.
- **Carry-over day**—Enter a date that signifies the end of a period when carry-over days become applicable and a new time-off accrual period starts. It can be any day and month.

> ## Tip
> - The **Carry-Over Day** is applied to all agents who are assigned this time-off rule. The last carry-over date for all agents is updated to the date you select in the **Carry-Over Day** field.
> - Time-off days can be requested or granted only if they are after the last carry-over date.

- Calculations of carry-over cannot be reversed.
- Carry-over calculations apply from the last carry-over date or the agent’s date of hire, whichever is more recent.

Editing Time-Off Rules

To edit a time-off rule:

1. In the **Time-Off Rules** pane, select the rule you want to edit.
2. Make the appropriate changes to the **Properties** and **Rules for Requests** pane settings.
3. Click Save Now  .

Tip

Editing time-off rules changes the way accrued hours are calculated by WFM. Changes affect time-off balances of all agents associated with the rule, but not the historical records of agents’ time-off balance calculated by the carry-over process.

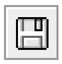
Deleting Time-Off Rules

To delete a time-off rule:

1. In the **Time-Off Rules** pane, select the rule you want to delete.
2. Click **Delete**  .
3. When the **Confirmation** dialog appears, click **Yes** to proceed or **No** to cancel the action.

Copying Time-Off Rules to Sites

To copy a time-off rule:

1. In the **Time-Off Rules** pane, select the rule you want to copy.
2. Click **Copy**  .
3. In the **Copy Time-Off Rule** pane, enter a new name for the rule.
4. Remove the check mark from the **Copy to the same Site** check box if you want to copy the rule to site, other than the selected one. Otherwise, leave it checked.
5. If you removed the check mark, select the site to which you want to copy this rule.
6. Click **Save Now**  .

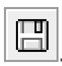
Rules For Requests

The **Rules for Requests** pane, enables you to configure rules for time-off requests.

Configuring Rules for Requests

Link to video

To configure rules for time-off requests, watch the video and/or follow this procedure:

1. In the **Time-Off Rules Properties** pane, click **Rules for Requests**.
2. Configure the rule settings below.
3. Click **Save Now** .

Next Step:

- Assign agents and time-off types to this rule. See Assigning Time-Off Rules and part 3 of this video series.

Rules for Requests Settings

- **Paid hours in full-day time off**—Enter the number of paid hours in a full day time-off period. (If you enter `0`, paid hours for full-day time off items are not defined.)
- **Estimated daily paid hours**—This value is enabled only if you left the Ignore accrual settings check box in the Properties pane unchecked. It is used only if you selected Hours or Days in the For every drop-down list for Number of hours earned. WFM Server uses this value when estimating an agent's time-off balance for dates when no schedule is available. Therefore, under normal circumstances, it should match the contract Standard Daily Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours.
- **Estimated weekly paid hours**—This value is enabled only if you left the Ignore accrual settings check box in the Properties pane unchecked. It is used only if you selected Hours or Days in the For every drop-down list for Number of hours earned. WFM Server uses this value when estimating an agent's time-off balance for dates when no schedule is available. Therefore, under normal circumstances, it should match the contract Standard Weekly Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours. You can configure this text box down to a one-minute time unit.
- **Automatically approve time-off requests if**:
  - **Request is made by the following number of weeks in advance**—Select and complete to enable WFM to automatically grant time off that an Agent requests through WFM Web, provided the request meets the Week(s) and Hours specifications in Minimum requested time off.

    - **Minimum requested time off is**—Enter minimum hours and minutes for time-off requests. **(Automatic Approval is also known as *auto-granting*.)**

- **Prevent agent time-off request if:**
    - **Request is made by the following number of days in advance**—Enter the number of days that an Agent can request time off in advance.
- **Issue warnings for time-off requests if:** (Checking this box effective prevents agents from making these requests.)
    - **Request is made by the following number of days in advance**—Enter the number of days an agent can request time off in advance before a warning is issued.
    - **Requested number of continuous time-off days in this request is less than the following value**—Enter a number for the minimum continuous time-off days an agent is allowed before a warning is issued.
- **Limit the total number of requested time-off hours, if:**
    - **Maximum number of hours that can be requested are**—Specify the number of days in advance that can be requested.
    - **Applicable time period for this limitation is**—Enter a time period for this limitation. Use this rule to ensure fairness, for example in vacation usage by restricting requests until every agent has reserved at least some vacation time. Also:
        - You can modify these rules at any time. Your change does not affect existing items, but it does affect all subsequent agent or supervisor actions.
        - You are restricting time-off usage, not time-off accrual.
        - Agents cannot request more time off than is allowed during the restricted period. But a supervisor requesting more time off than is allowed will receive a warning and will be able to override the restriction.

Assigning Time-Off Rules

Use the **Time-Off Rules Assignment** pane to assign agents and time-off types to a time-off rule.

Associating Agents and Time-Off Types to Rules

To associate agents and time-off types to time-off rules, watch the video and/or complete this procedure:

Link to video

1. In the time-off rules **Assignments** pane, click **Associate Agents and Time-Off Types with this rule** .
2. Enter a **Start Date** and **End Date** for this rule assignment.
3. Click **Add Agent(s) to a Time-Off Rule** .
   A pane containing a list of available agents opens.
4. Select one or more agents to associate with this rule and then, click **Apply** .
   The selected available agents are moved to a list of assigned agents.
5. In the **Time-Off Types** section, click **Add Time-Off Types to a Time-Off Rule** .
   Another pane opens, enabling you to select from a list of time-off types.
6. Select one or more time-off types and click **Apply** .
   The selected time-off types are moved to a list of assigned time-off types.
7. In the **Associate following agents and time-off types with rule** pane, click **Apply** again.

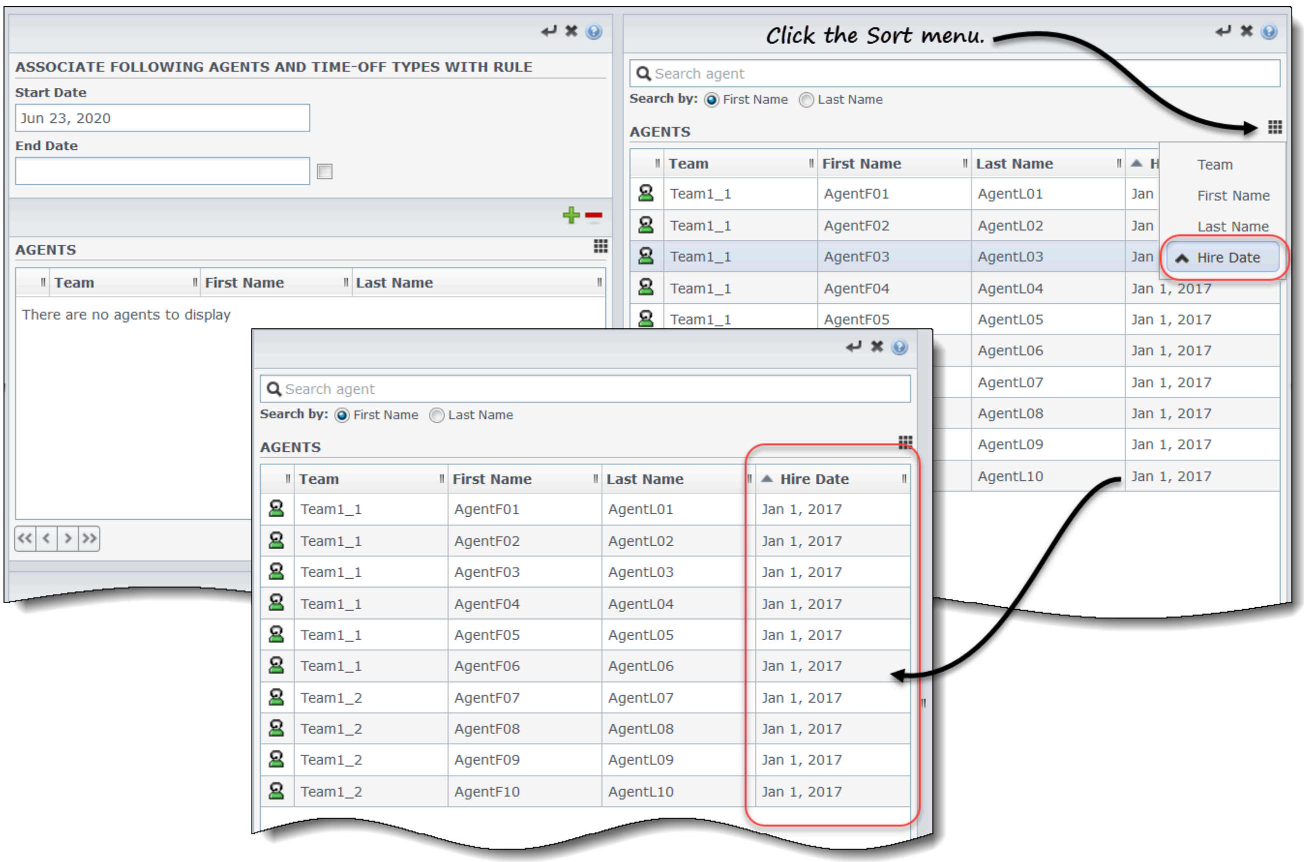
Disassociating Agents and Time-Off Types

To disassociate agents and time-off types to time-off rules:

1. In the assigned agents and time-off types lists, select the items you want to disassociate from this rule.
2. Click **Remove Agents and Time-Off Types association from this rule** .
3. When the confirmation dialog appears, click **Yes** to proceed or **No** to cancel the action.

Associating Agents Based on Hire Dates

Use the following procedure to perform bulk assignments of time-off rules, based on the agents' hire date.



1. In the time-off rules **Assignments** pane, click **Associate Agents and Time-Off Types with this rule**  .
2. Enter a **Start Date** and **End Date** for this rule assignment.
3. Click **Add Agent(s) to a Time-Off Rule**  .
   A pane containing a list of available agents opens.
4. Click **Sort** and choose **Hire Date**.
5. Select one or more agents to associate with this rule, based on the hire date and then, click **Apply**  .

The selected available agents are moved to a list of assigned agents.

6. To assign time-off types, complete steps 5-7 in the procedure above.

When selecting **Hire Date** in the **Sort** menu, you can toggle it to display in ascending or descending order, or toggle it in the column header.

To select multiple rows in lists, use the Shift+Space keys on the keyboard, or hold down the Shift key and use your mouse. Simply hold down the Shift key and either click the first and last row you want to select or click each row, one after the other.

Meetings

Use the **Meetings** view to create, edit, copy, or delete meetings, or to assign attendees to meetings.

> **Important**
> To configure objects and change settings in the **Meetings** view, you must have the appropriate role privileges. See Policies Role Privileges.

Planner vs. Scheduler

Use the **Meeting Planner** (described here) to create and configure meetings that you know about in advance. It is especially useful for recurring team meetings or coaching sessions. Meetings that are created in the **Meeting Planner** are taken as inputs during schedule building.

Use the Meeting Scheduler to create ad hoc meetings and insert them into a schedule that has already been built. Access the **Meeting Scheduler** feature in WFM Web Supervisor from within the **Intra-Day Schedule** view or **Agent-Extended Schedule** view.

Meetings Pane

The toolbar above the **Meetings** pane contains the following controls:

New	Creates a new meeting, which begins by opening the Properties tab.
Delete	Removes the selected meeting. This command cannot be undone. A **Confirmation** dialog enables you to cancel or continue. This command is not enabled if the meeting contains one or more agents who are not visible to the current user (because of a lack of permissions).
Copy	Enables you to copy the selected meeting to create a new one.
Filter	Filters the **Meetings** list by agent or team. See Filtering Agents and Teams.
Sort	Sorts the **Meetings** list in ascending or descending order. (You can also click the **Meetings** column header to sort the list.)

This pane also includes a Search field and Help icon.

Meetings View Settings

You can configure settings in three tabs in the Meetings view (after clicking **New** or selecting an existing Meeting):

- Properties Tab
- Participants Tab
- Associated Sites Tab

At the top of all three tabs you will find the **Save** icon, which enables you to save the meetings settings in a particular tab, and the **Help** icon.

Properties Tab

- **Name**—The name of this meeting, for example, Sales Meeting or Monthly Review. The name must be unique within all sites associated with the meeting. You can also add a memo in this field, Memos in Meeting Exceptions in the *Workforce Management Administrator's Guide*.
- **Exception Type**—You can base a meeting on any exception type that is configured for the current site if you selected the Exception Usage: in Meeting Planner option when creating exception types.
- **Earliest Date and Time**—A proposed time at which Scheduler can assign the meeting to start.
- **Latest Date and Time**—A proposed time at which **Scheduler** can assign the meeting to end.
- **Meeting Duration**—The length of time that **Scheduler** should allot for the meeting.
- **Days of the week**—The days of the week on which **Scheduler** can assign this meeting.
- **Time Zone**—The time zone to use when displaying any time-related information. Set by default to `local` (current user's time zone.)

Meeting Type section: Select one of the following three radio buttons to enable the properties that are associated with them:

- **Single Agent**—A common activity, such as a webinar, that can occur at the most convenient time for each agent.
- **Single Group**—The default meeting type. Represents a single meeting for all agents who are specified on the Participants tab.
  - Enter or select the meeting's minimum number of attendees requirement in the **Required Percentage of attendees** box. Set this value to 1% to schedule a meeting for as many attendees as possible. Using 1% does not require a minimum number of attendees. The default value is `100` percent.
- **Multiple Groups**—A common time, but for multiple groups. Enter or select a number in each of the

following fields to specify the group sizes:

- **Min. Number of Groups**
- **Minimum Group Size**
- **Max. Number of Groups**
- **Maximum Group Size**

Recurrence: section: Select one of the following five radio buttons to enable the properties that are associated with them:

- **Use Total Hours**—The total meeting hours. When you specify this optional parameter, Scheduler creates as many meetings with the defined duration as necessary, to satisfy the Total Hours requirement. For example, if the meeting duration is set to two hours, and **Use Total Hours** is set to six hours, Scheduler generates three two-hour meetings. Scheduler can assign these meetings consecutively.

> **Tip**
>
> The value of **Use Total Hours** is not used for Multiple Groups meetings.

- **Daily**—Occurs once a day.
- **Weekly**—Occurs once a week (unless a value other than 1 is entered in the **Recurs Every** setting).
  - **Recurs Every**—Defines how often the meeting should recur. Examples: 1 (every week), 2 (every other week), 3 (every third week).
- **Monthly**—Occurs once a month.
- **Set Number of Times instead of Latest Date**—If you select Daily or Weekly for the Recurrence type, set a value for the number of consecutive days or weeks during which this meeting should be scheduled. If you check this box and enter a value, a red asterisk and comment appears below the **Latest Date and Time** option, indicating that latest date is being overwritten by the **Number of Times** setting.

> **Tip**
>
> WFM requires that either Number of Times or Latest Date be set, not both.
>
> The current date will be displayed in the **Latest Date** field but this value will not be used to schedule meetings. The **Latest Time** value will be used for scheduling meetings when either **Latest Date** or **Number of Times** is set.
>
> Even though values can be set in all fields, only values for the appropriate meeting type are used for scheduling. For example, **Required Percentage of attendees** will be used only for Single Group meetings.

Participants Tab

Use these controls when you are adding participants to the meetings:

Search *field*	Enables you to enter criteria, used to search for available agents.
Search by: *radio buttons*	Enables you to search for available agents by **First Name** or **Last Name**.
Add Agents	Enables you to add agents to the **Participants** list, by opening a list of Available Agents.
Remove Agents	Removes selected agents from the **Participants** list. This action cannot be undone.
Sort	Sorts the participants list by **First Name**, **Last Name**, **Site**, or **Team**.

The **Participants** tab also displays four columns: **First Name**, **Last Name**, **Site**, and **Team** name of the participants in the selected shared transport.

List of Available Agents

The **Available Agents** pane contains the following fields and controls:

Search *field*	Enables you to enter criteria, used to search for available agents.
Search by: *radio buttons*	Enables you to search for available agents by **First Name** or **Last Name**.
Apply	Applies the agents you select from the **Available Agents** list to the **Participants** list.
Filter	Enables you to filter the **Available Agents** list by **Activities**, **Multi-Site Activities**, or **Contracts**.
Close	Closes the **Available Agents** pane without applying any selections.
Sort	Sort the available agents by **First Name**, **Last Name**, or **Team**.

Associated Sites Tab

1. Select the check box of each site to associate with the current meeting.
2. Clear the check box of each site to disassociate from the current meeting.
3. Click **Save**.

Managing Meetings

Use the procedures in this topic to create, edits, delete, copy, and add participants to meetings.

Creating Meetings

Link to video

To create a meeting:

1. In the **Policies** module, select **Meetings**.
2. Select a site or business unit (this action selects all indented sites beneath it) on the **Objects** pane.
3. Click **New** .
   The Properties tab opens, by default.
4. Configure the settings, as described in the **Properties**, **Participants**, and **Associated Sites** tabs, as required.
5. Click **Save** .
   The new meeting appears in the Meetings pane.

Adding Participants to Meetings

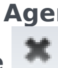
To add participants to a meeting:

1. In the **Meetings** pane, select a meeting and then, click the **Participants** tab.
2. Click **Add** .
3. In the **Available Agents** pane, select one or more agents.

> **Tip**
> You can also filter, sort, or search agents in the list of available agents.

4. Click **Apply** .

The selected agents move to the **Agents** list in the **Participants** pane.

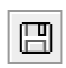
Alternatively, you can click **Close**  to close the pane without saving your selections.

Important

- Agents can appear in only one pane at a time.
- Only agents from the meeting site are available for selection.
- When a schedule that includes the meeting time is generated, Scheduler verifies that enough agents are available to satisfy the **Minimum Percentage** requirement and then assigns the meeting exception to the available agents. If too few agents are available, **Scheduler** generates an error message and does not schedule the meeting.

Editing Meetings

To edit a meeting:

1. In the **Meetings** pane, select the meeting you want to edit.
2. Click any one of the three tabs (**Properties**, **Participants**, or **Associated Sites**) to change its settings.
3. When you are finished making changes, click **Save**  .

Deleting Meetings

To delete a meeting:

1. In the **Meetings** pane, select the meeting you want to delete.
2. Click Delete  .
3. When the **Confirmation** dialog opens, select **Yes** to proceed or **No** to cancel the action. **If you select Yes, the meeting is deleted and the action cannot be undone.**

Copying Meetings

To copy a meeting:

1. In the **Meetings** pane, select the meeting you want to copy.
2. Click **Copy** .
3. When the **Copy Meeting** pane opens, enter a name for the meeting.
4. In the bottom half of the pane, click the **Enterprise** list and select the business unit and site, to which you want to associate this meeting.
5. Click **Apply** .

   Alternatively, you can click Close to close this pane and cancel the action. If you do this, the meeting is not copied.

Filtering the Available Agents List

When you are adding participants to a meeting and there is a large number of agents to select from, you might want to use the **Filter** (found at the top of the **Available Agents** pane) to easily group them by **Activities**, **Multi-Site Activities**, or **Contracts**.

After you create one or more filters, they appear as bullets above the **Available Agents** list. If only one item is selected for the filter, the bullet shows the selected item's name. If more than one item is selected, the bullet shows the number of items in the filter.

When you click **Filter** in the **Available Agents** pane, you will see three tabs, all of which have the following controls:

Common Controls

Apply	Applies the selected items in a list (activities, multi-site activities, or contracts).
Close	Closes the **Filter** pane without applying the selected filter conditions.
Add	Opens a pane containing a list of items for selection (depending on the tab you selected: **Activities**, **Multi-Site Activities**, or **Contracts**).
Remove	Removes any previously selected items from the **Filter by..** list.
Search *field*	Uses search criteria to quickly find items in long lists.
Sort	Enables various sort options, depending on the list of items you are sorting: • For activities, sort by **Activities** or **Type** • For multi-site activities, sort by **Multi-Site Activities** or **Type** • For contracts, sort by ascending or descending order

Filtering Agents by Activities

Link to video

1. In the **Available Agents** pane, click **Filter** .
   The Filter by.. pane opens with the Activities tab selected by default.
2. In the **Filter by Activities** pane, click **Add** .
3. When the list of activities opens, select one or more activities, and click **Apply** .
4. In the **Activities** tab, if the filter contains all selected activities, click **Apply** again.
5. To remove an activity from the filter, click **Remove** before applying the filter.
6. To close this pane without applying any of the selected items, click **Close** .
   The filter now appears at the top of the Available Agents pane.

Filtering Agents by Multi-Site Activities

1. In the **Available Agents** pane, click **Filter** .
   The **Filter by..** pane opens with the **Activities** tab selected by default.
2. Click **Multi-Site Activities**.
3. In the **Filter by Multi-Site Activities** pane, click **Add** .
4. When the list of multi-site activities opens, select one or more activities, and click **Apply** .
5. In the **Multi-Site Activities** tab, if the filter contains all selected activities, click **Apply** again.
6. To remove an activity from the filter, click **Remove** before applying the filter.
7. To close this pane without applying any of the selected items, click **Close** .
   The filter now appears at the top of the Available Agents pane.

Filtering Agents by Contracts

1. In the **Available Agents** pane, click **Filter** .
   The Filter by.. pane opens with the Activities tab selected by default.
2. Click **Contracts**.
3. In the **Filter by Contracts** pane, click **Add** .

When the list of contracts opens, select one or more contracts, and click **Apply** .

5. In the **Contracts** tab, if the filter contains all selected contracts, click **Apply** again.
6. To remove a contract from the filter, click **Remove** before applying the filter.
7. To close this pane without applying any of the selected items, click **Close** .
   The filter now appears at the top of the Available Agents pane.

Viewing and Removing Filters

Filters appear at the top of the **Available Agents** list, which now contain only the filtered items. You can see the contents of a filter in two ways:

- Click the filter to open a list of them.
- Hover your cursor over the filter to see a pop-up that displays them.

For example, in the figure below the user clicked the **Activities (2)** filter, which opened the **Filter by Activities** pane listing the items in that filter.

To remove a filter without opening it, click the **X** in the bullet itself.

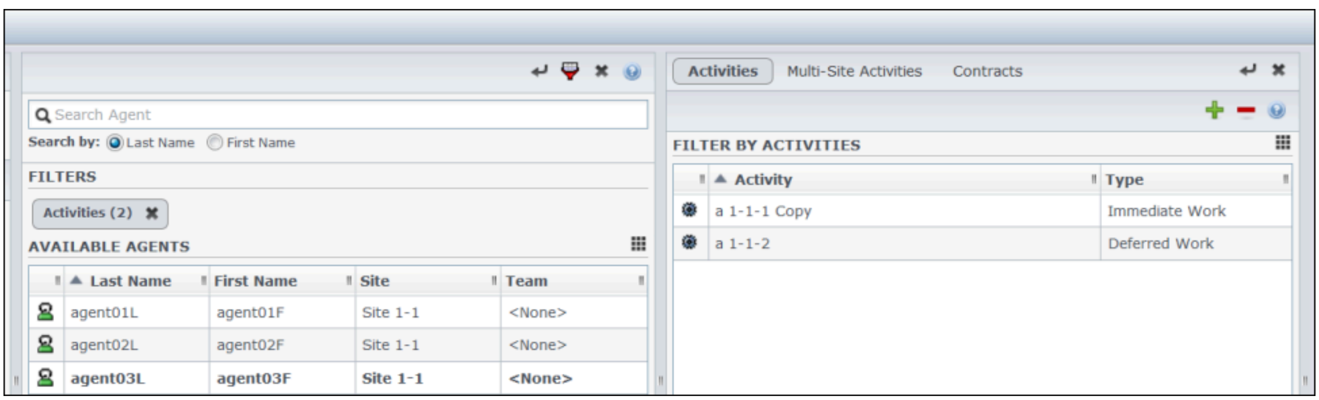


Figure: Filter Bullets in Meetings View

Marked Time

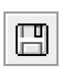
Use Marked Time to identify periods that WFM should track and display that are not already accounted for. For example, some agents might each work a number of hours on an issue involving one account. By using marked times, you can designate that those hours spent working on that issue be displayed in the Schedules module and reported on, using the Schedule Marked Time Report and Schedule Marked Time Totals Report that are generated in WFM Web's Reports module.

Use the procedures in this topic to create, edit, delete, and copy Marked Time.

Creating Marked Time

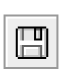
Link to video

To create new Marked Time:

1. In the **Policies** module, select **Marked Times**.
2. In the **Objects** pane, select the site(s) or business unit with which the new object will be associated.
   You can select multiple sites (just keep clicking on them) but only one business unit.
3. Select **New** .
   The Properties tab opens by default.
4. Configure the Properties tab.
5. Click the Associated Sites tab and select the sites you want to associate with this Marked Time.
6. Click **Save**  .

Editing Marked Time

To edit Marked Time:

1. In the **Marked Times** pane, select a marked time.
2. Select the Properties tab and/or the Associated Sites tab, and make the changes.
3. Click **Save**  .

Deleting Marked Times

To delete Marked Time:

1. In the **Marked Times** pane, select a marked time.
2. Click **Delete**  .

Copying Marked Times

To copy an existing Marked Time:

1. In the **Marked Times** pane, select an existing Marked Time.
2. Click **Copy**  .
3. When the **Copy Marked Time** pane opens, type a name for the Marked Time.
4. Expand the **Enterprise** list and select the site, to which you want to associate this Marked Time.
5. Click **Apply**  .

Properties Tab

- **Name**—Each Marked Time should have a descriptive name that is unique within the site.
- **Short Name**—The name to be used in graphical representations of the Marked Time and Scheduler. It can be up to three characters.
- **Special Uses**—Select one of three radio buttons:
  - **None**—This marked time has no special uses (default).
  - **Use for overtime**—This marked time is to be used to mark overtime schedule states.
  - **Use for payback**—This marked time is to be used to pay back work time that was missed, due to (agent's) lateness or a personal appointment.

Associated Sites Tab

1. Select the check box of each site to associate with the current **Marked Time**.
2. Clear the check box of each site to disassociate with the current **Marked Time**.

3. Click **Save**.

Shifts

A *shift* defines basic workday parameters. Shifts are defined by time of day, duration, and days of the week. Create, copy, edit, and delete shifts by clicking **Policies > Shifts** and selecting the appropriate business unit and site on the **Objects** pane.

Creating New Shifts

Link to video

You can create a new shift or copy an existing shift to create a new one. To create a new shift:

1. Go to **Policies > Shifts**.
2. In the **Objects** pane, select the **Business Unit** and then, the **Site**, in which you want to create the shift.
3. Click **New**  .
   The new shift appears on the Shifts pane. with the default name.
   The default name includes a number to ensure that each shift has a unique name in the Configuration database. You can change this name, but it must remain unique to prevent duplicate name errors from occurring.
4. Configure the shift properties.

Copying Shifts

To copy an existing shift:

1. Select a shift.
2. Click **Copy**  .
   The Copy Shift <shift_name> pane opens.
3. In the Name field, enter a name for the shift.
   The Copy to the same Site check box is checked, by default.
4. If you choose to uncheck the **Copy to the same Site** check box, select the **BU** and then, the **Site**, in which you want to create the shift (see the figure below).

Figure: Copy Shift

5. Click **Save Now** .
   The new shift appears on the Shifts pane under the selected Site.
6. Change the shift properties, if necessary.

Use the following panes to configure the new shift:

- Shift Properties
- Shift Contracts
- Task Sequences
- Shift Sequences

Editing Shifts

To edit a shift:

1. On the **Shifts** pane, select the shift you want to edit.
2. Make the necessary changes in each pane.
3. Click **Save Now** .

Deleting Shifts

To delete a shift:

1. On the **Shifts** pane, select the shift you want to delete.

2. Click **Delete** .

Shift Number Limitation During Building

The maximum number of shifts that can be configured when building schedules is 100 shifts.

Count all the agents configured for your schedule scenario, all their different contracts, and all the different shifts associated with those contracts. The total number of shifts cannot exceed 100. If it does, your build will fail, and WFM will display `Error 43: Too many shifts: the maximum number is 100, but more than 100 were requested`.

> **Tip**
>
> You can configure more than 100 shifts in your WFM database; the limitation is that you cannot associate more than 100 shifts with a single schedule.

Use Rotating Patterns to Solve a "Too Many Shifts" Problem

A contact center might configure a very large number of shifts, because the managers believe that multiple shifts are the only way to create *fixed* schedules. However, rotating patterns can accommodate many different types of schedules, including both fixed and flexible schedules, using very few shifts. For example, you could create weekly rotating patterns to configure a fixed schedule that uses just one shift. For more information see Rotating Patterns.

Shift Properties

Use the **Shifts Properties** pane to define the general shift parameters. By default, this pane opens when you select a shift in the **Shifts** pane.

Name Field

The name for this shift. Use names, such as First Shift, Swing Shift, or Second Shift, that identify the shift type. The name must be unique within the site.

Time and Duration

- **Min. Paid Hours**—The minimum number of hours defined for this shift, entered in hh:mm format. All contracts assigned to the shift must be available to work at least this number of hours. Valid values are `00:01` to `23:45`. This value must be less than or equal to the **Maximum Daily Paid Hours** setting in the associated contract. Must include all paid breaks and meals.
- **Max. Paid Hours**—The maximum number of hours defined for this shift, entered in `hh:mm` format. Valid values are `00:01` to `23:45`. This value must be greater than or equal to the **Minimum Daily Paid Hours** setting in the associated contract. Must include all paid breaks and meals.
- **Earliest Start Time**—The earliest time that this shift can start. Some sites stagger shifts so that, for example, all third-shift agents arrive between 7:15 and 8:15. The earliest start time for this shift would then be 7:15.
- **Latest End Time**—The latest time that this shift can end. Shift agents can end their shift at staggered intervals that correspond to the stagger at the beginning of the shift. For example, a shift that starts between 7:15 and 8:15 can end between 3:15 and 4:15. The latest end time for this shift would then be 4:15.
- **Next Day**—When this check box is checked, indicates that this shift can end during the next day.
- **Start Step**—If using staggered start times for various agents working a shift, the **Start Step** is the increment of time between possible shift start times. **Scheduler** uses this **Start Step** to configure agent schedules. The start step can be any number of minutes between 1-120.

Important

The Earliest Start Time's last two digits must be either `:00` or an even multiple of the **Start Step** entry; otherwise, **Scheduler** disregards the Start Step entry and defaults to a **Start Step** of 15 min. For example: If you set an **Earliest Start Time** of 9:15 and a **Start Step** option of 30 minutes, the **Scheduler** disregards the **Start Step** entry (because 15 is neither equal to nor a multiple of 30), and starts shifts at 9:15, 9:30, 9:45, 10:00, and so on.

Use the following optional time settings to narrow the range of time during which the start or end of the shift can be scheduled. You can create a fixed start or end time for the shift. For example, to set a fixed start time, set the **Latest Start Time** field to the same time as the **Earliest Start Time** field. The total shift duration then remains flexible.

> **Important**
> If you set fixed start and end times for your shift, the shift will be too inflexible to create optimal schedules.

- **Latest Start Time**—The latest time that this shift can start. Some sites stagger shifts so that, for example, all third-shift agents arrive between 7:15 and 8:15. The latest start time for this shift would then be 8:15.
- **Earliest End Time**—The earliest time that this shift can end. Shift agents can end their shift at staggered intervals that correspond to the stagger at the beginning of the shift. For example, a shift that starts between 7:15 and 8:15 might end between 3:15 and 4:15. The earliest end time for this shift would then be 3:15.

Available Days of Week

The days of the week for which this shift can be assigned by the scheduling algorithm. By default, all days are selected.

Distribution:

- **Min.**—The minimum number of occurrences of the shift for each agent whose contract is associated with the shift.
- **Max.**—The maximum number of occurrences of the shift for each agent whose contract is associated with the shift.
- **Applies To**—The period of time for which Scheduler should apply the distribution minimum and maximum.
    - **Disregard**—Distribution properties are not applied.
    - **Every Week**—The Min./Max. are considered on a weekly basis. Amounts entered should equal the numbers required for one week.
    - **Schedule Planning Period**—Distribution properties are applied to the schedule planning period. Distribution amounts entered should equal the numbers required for the entire schedule planning period.

Days-Off Rule

The rules that can be defined for the days off that are associated with the shift:

- **No Rule** means there are no rules about days off.
- There are three possible day-off rules:
    - **Next day**—If agents work this shift, they get the next day off.
    - **Previous day**—If agents work this shift, they get the previous day off.
    - **Next day is not off**—If agents work this shift, they cannot get the next day off.

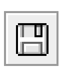
Shift Contracts

Use the **Shifts > Contracts** pane to assign contracts to a shift. You opened this pane, by clicking **Contracts** at the top of the **Shift Properties** pane.

> **Important**
> Assigning contracts to a shift is optional. You can save a shift without associating it with a contract.

Assigning a Contract to a Shift

To assign a contract to a shift:

1. In the **Shifts** pane, select a shift.
2. In the right-side pane, select **Contracts**.
3. Click **Assign a Contract to a Shift**  .
4. In the **Use This State for Assignments** drop-down list, select the appropriate state.
5. Select one or more contracts from the list on the **Contract Associations** pane. You can assign multiple contracts to a single shift.
6. Click **Apply**  to move the selected contracts into the **Contracts** pane.
7. Click **Save Now**  .

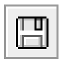
Removing a Contract from a Shift

To unassign or remove a contract from a shift:

1. In the right-side pane, select **Contracts**.
2. In the **Contracts** list, select the contract you want to remove.
3. Click **Remove Contract from Shift**  .
4. When the **Confirmation** dialog appears, click **Yes**.

Changing the State of an Assigned Contract

To change the state of an assigned contract:

1. In the **Contracts** pane, use the **State** drop-down menu for the **Contract** you want to change and select **Primary** (default) or **Secondary**.
2. Click **Save Now**  .

Tip

- Assigned contracts appear only in the **Contracts** pane.
- To select multiple contracts, hold down **SHIFT** or **CTRL** and click each additional contract.
- Each assigned contract has a state: **Primary** or **Secondary**. The default state after being moved is **Primary**.

Task Sequences

Task sequences define periods of time during which agents can work only on a specified set of tasks that are then configured as one or more **Activity Sets**. Time that is not included in a task sequence can include any work that the agent has the skills to perform and which is not part of any configured **Activity Set**. For examples and more detailed information about task sequences, see the *Workforce Management Administrator's Guide*.

Use the **Shift > Task Sequences** pane to create, edit, or delete task sequences or to assign task sequences to the shift, but note the following:

- Although you create task sequences during configuration of a particular shift, after they have been created you can assign task sequences to any compatible shift within the same site.
- To be compatible, task sequence settings must not conflict with meal settings.
- Task sequences are optional. However, if any task sequences are defined for a shift, the shift must include at least one task sequence. Make one of three selections in the **Task Sequences Usage** drop-down list, as shown in the figure below.

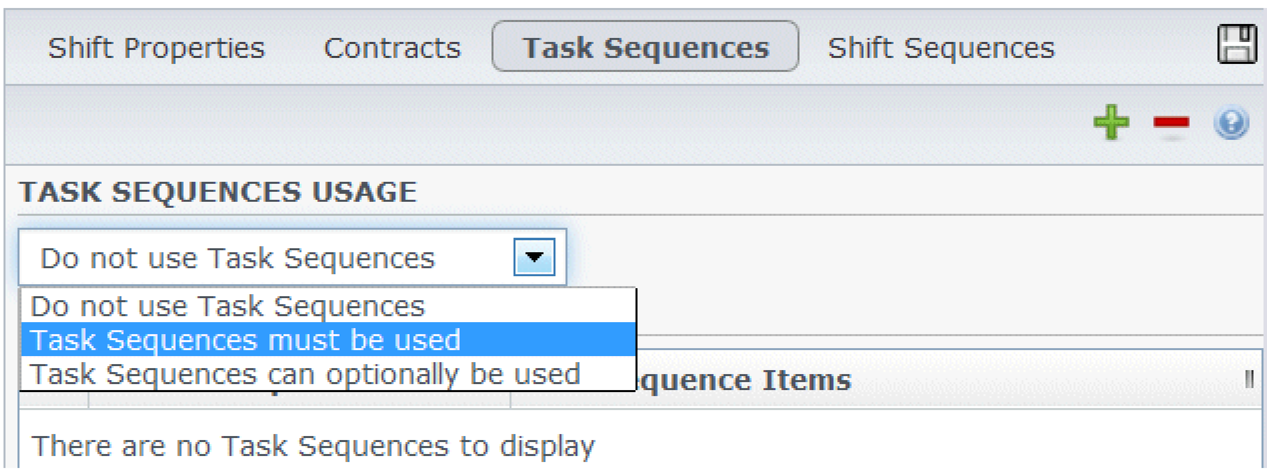


Figure: Task Sequences Usage Settings

Creating a Task Sequence

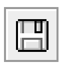
To create a task sequence:

1. At the top of the **Shift Properties** pane, select **Task Sequences**.
   The **Task Sequences** pane opens.
2. Select a setting from the **Task Sequences Usage** drop-down list (see figure above).

3. Click **Add**  to open the **Task Sequence Items** window. See Adding and Editing Task Sequences for information about configuring the new task sequence.

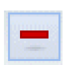
Assigning Task Sequences to a Shift

After you have created and saved your task sequences, you can assign them to a shift. To assign a task sequence to the shift:

1. In the **Shifts** pane, select the shift for which you want to apply a task sequence.
2. In the **Task Sequences Usage** drop-down list, choose either **Task Sequences** must be used or **Task Sequences** can optionally be used.
   If you choose to retain the default setting Do not use Task Sequences, none are assigned.
3. In the **Task Sequences** pane, select a task sequence.
4. Click **Save Now**  .

Removing a Task Sequence from a Shift

To remove a task sequence from a shift:

1. In the **Shifts** pane, select the shift for which you want to delete a task sequence.
2. In the **Task Sequences** list, select the task sequence.
3. Click **Delete**  .

Adding and Editing Task Sequences

Use the **Task Sequences** pane controls to create and edit task sequences.

Search *field*	Enter the search criteria. For example, the name of the task sequence.
Apply	Click to apply an this task sequence to a shift.
New	Click to create a new task sequence
Delete	Click to delete an existing task sequence.
Close	Click to close the **Task Sequences** pane.
Help	Click to view a Help topic about the **Task Sequences** pane.

Use the following controls in the **Task Sequence Items** pane:

Save Changes	Click to save changes you have made in this pane.
Add Activity Set	Click to add an Activity Set to the task sequence.
Add Work Item	Click to add a Work item to the task sequence
Delete Row	Click to delete an existing row.
Move Up	Click to move a selected row up one row.
Move Down	Click to move a selected row down one row.
Close	Click to close the **Task Sequence Items** pane.
Help	Click to view a Help topic about the **Task Sequence Items** pane.

What is a Work Item?

A Work item is work that can be done in between tasks in Task Sequence or in between the task and the start/end of the shift. Add work items to task sequences only if tasks are *not* anchored to one another. Use the following guidelines:

- If a Work item is added before the task, it means the task is not anchored to the start of the shift or the previous task.
- If a Work item is added after the task, it means the task is not anchored to the end of the shift or the following task.
- If a Work item is not added before the task, it means the task is anchored to the start of the shift or the previous task.
- If a Work item is not added after the task, it means the task is anchored to the end of the shift or the following task.

Adding a Task Sequence

1. In the **Task Sequence Usage** pane, click **Add Task Sequence Association With Shift**.
2. In the **Task Sequence** pane, do one of the following:
    - Select an existing task sequence and then proceed to step 7.
    - Click **New Task Sequence**.
      The Create New Task Sequence pane opens.
3. In the **Task Sequence Name** field, enter a name to replace the default name.
   The name must be unique within the site.
4. Click **Add Activity Set** or **Add Work Item** to create a new row in the task sequence list.
5. Configure the settings as described in Task Sequence Settings. You can add as many rows as you need.
6. When task sequence configuration is complete, click **Save Changes** and select it in the list.
7. To assign the selected task sequence to the shift, click **Apply** .
8. Click **Save Now** .

Editing a Task Sequence

1. In the **Task Sequence Usage** pane, click the task sequence that is displayed in the **Task Sequence** table.
   The Edit Task Sequence pane opens.
2. Make your changes. If you need to add more rows to your task sequence list, click **Add Activity Set** or **Add Work Item** .
3. When you have finished, click **Apply**.

Important

The duration of the task sequence must be greater than, or equal to, the duration of the selected activity set.

Deleting Task Sequences

1. In the **Task Sequences** pane, select a task sequence in the list.
2. Click **Delete** .

Task Sequences Settings

- **Activity Set**—You can use any activity set that is configured for the current site. You can use the same activity set in any number of task sequences. For more information about activity sets, see Creating and Deleting Activity Sets.
- **Min Duration**—The minimum duration, in hh:mm format, for this task sequence.
- **Max Duration**—The maximum duration, in hh:mm format, for this task sequence.

Important

The minimum duration of an activity set that is configured as part of a task sequence must be less than or equal to the maximum possible duration of the shift for which that task sequence has been configured.

Shift Sequences

Shift items are breaks and meals. Use the Shift Items controls to create, edit, and delete breaks and meals and to arrange them into patterns called *shift items sequences*.

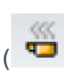
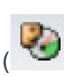
To open the **Shift Sequences** pane, select a shift in the **Shifts** pane and in the right-side pane, select **Shift Sequences**. The **Shift Sequences** pane has three sections: **Distance Between Shift Items**, **Meals and Breaks Associated with Shifts**, and **Shift Sequences**, which are described in the following topics:

- Configuring Shift Items
- Using Shift Sequences
- Adding and Editing Shift Sequences
- Configuring Shift Sequences

Configuring Shift Items

1. To configure **Minimum Distance Between Shift Items**, uncheck the **Unlimited** check box and enter the time, in minutes, that must elapse between one shift item and the next.
   This parameter sets the minimum required distance between meals and breaks.
2. To configure **Maximum Distance Between Shift Items**, uncheck the **Unlimited** check box and enter the time, in minutes, that represents the maximum that can elapse between one shift item and the next. This parameter sets the maximum allowed distance between meals and breaks, between shift start and first shift item, and between last shift item and shift end. The initial display is `0:00`; but the control is actually disabled until you clear the **Unlimited** check box. Range: `00:00–36:00`

   > **Important**
   > In the settings above, using a value of `0:00` means: Do not use this constraint.

3. To create a new meal, click **Add Meal association with shift** ().
4. To change settings for a meal, select it and then click **Edit**.
   See Adding and Editing Meals for information about configuring meals.
5. To create a new break, click **Add Break associate with shift** (). To change settings for a break, select it and then click **Edit**. See Adding and Editing Breaks for information about configuring breaks.

> **Important**
> When you edit, delete, or change the order of meals or breaks in a shift item sequence, that sequence is deleted.

6. Click **Move Up** () or **Move Down** () to arrange the breaks in the order in which you want them to occur if more than one is included in a shift sequence.
   The order of meals is fixed. You can only modify the order by changing the position of breaks around them, using **Move Up** and **Move Down**. To change the order in which meals occur, you must return to the **Meals** pane and make changes there.

> **Warning**
> Changing the order of meals on the **Meals** pane automatically deletes all shift sequences that include those meals.

7. Create a **Shift Sequence** if you want to create a pattern of breaks and meals to apply to a shift. See Using Shift Sequences for information on configuring new sequences or editing existing ones.
8. When you have finished configuring the shift items, click **Save** to save the settings or **Cancel** to discard them.

Using Shift Sequences

A shift sequence enables you to arrange meals and breaks so that they occur in a specific order during the shift.

When you create multiple shift sequences for the same shift, **Scheduler** first sets the shift and then checks for compatible shift item sequences for that shift. **Scheduler** checks shift work duration and meal constraints to select the optimal shift item sequence.

> **Important**
> When you edit, delete, or change the order of meals or breaks in a shift sequence, that sequence is deleted.

Shift sequences appear in the list pane at the bottom of the **Shift Sequences** pane. This list shows these shift sequence properties:

- **Allowed** check box:
  - If checked, this shift item sequence is enabled and can be used in schedules.

    - If cleared, this shift item sequence is disabled and cannot be used in schedules.
- **Min Paid Hours**—The shortest period of time that can be scheduled for this shift item sequence.
- **Shift Items Names**—The names of the shift items that are included in the sequence and listed in the correct order.

Adding and Editing Shift Sequences

- To create a new shift sequence, click **New** in the **Shift Sequences** section.
- To edit a shift sequence, select it in list of shift sequences.
  The **Shift Sequences Properties** pane opens, enabling you to make changes to the meals and breaks **Shift Items** list.

Configuring Shift Sequences

To configure the shift sequence:

1. After you have associated meals and breaks with a shift and saved the settings, click **New** in the **Shift Sequences** section.
   The **Shift Properties** pane opens.
2. Select the **Allowed** check box to activate this shift item sequence.
   If you do not want to use the shift item sequence in schedules for a certain period of time, you can clear this check box rather than deleting the shift item sequence. This keeps the sequence available for when you want to use it again.
3. Enter a value in the **Minimum Paid Hours** field.
4. Click **Add Break**.
   The **Breaks To Be Added To The Shift Sequence** pane opens.
5. In this pane, do one of the following:
    - Select a break in the list and click **Apply**.
    - Select a break in the list and click **Copy**. You can copy the break to the same site, by checking the **Copy** to the **Same Site** check box, or copy it to another business unit and site within the enterprise.
    - Enter search criteria in the **Search** field (for example, the name of the break) to quickly find the break you want to apply or copy.
6. Click **Move Up** and **Move Down** to change the placement of a selected item.

> **Important**
> You cannot use **Move Up** and **Move Down** to change the order of the meals. If

> moving the selected item up or down would change the meal order, then clicking the button has no effect. To change the meal order, return to the **Shift Sequence Properties** pane and make the change there. If you do so, your all shift item sequences are deleted and you must recreate them.

7. When you have finished, click **OK**. To discard all changes, click **Cancel**.
   The new or edited shift sequence appears on the **Shift Sequence** pane. This list is always sorted by the value in the **Minimum Paid Hours** column.

Adding and Editing Breaks

Use the **Break Properties** pane to define the rules for assigning breaks during a shift.

A shift can contain up to eight breaks.

Configuring Breaks

To configure a break:

1. In the **Shifts** pane, select the shift with which you want to associate this break.
2. In the right-side pane, select **Shift Sequences**.
3. In the upper-right corner of the **Shift Sequences** pane, click **Add Break association with shift** ( ).
   The **Breaks To Be Associated With Shifts** pane opens.
4. In this pane, do one of the following:
   - Add a new break by selecting **New** . The new break is added to the list and can be assigned to a shift.
   - Create a copy of break by selecting it in the list and clicking **Copy** .
     You can copy the break to the same site, by checking the **Copy to the Same Site** check box, or copy it to another business unit and site within the enterprise.
   - Delete a break by selecting it in the list and clicking **Delete** . The break is no longer associated with any shift.
   - Enter search criteria in the **Search** field (for example, the name of the break) to quickly find the break you want to apply or copy.
5. To assign a break to a shift, select it and click **Apply** .
   The break appears in the **Meals and Breaks Associated with this Shift** list.

Break Rules Properties

- **Break Name**—The name of the break. Use names that clearly identify the break type. The break name must be unique within the site.
- **Break Short Name**—Enter a short name of up to 3 characters to identify this break. The short name

appears in the Intra-Day and Agent Extended Schedule views.

- **Schedule State Group**—Select a **Schedule State Group** in the drop-down list.
- **Duration of the Break**—The duration of this break in one-minute increments, entered in `hh:mm` format.
- **Minimum Length from Shift Start**—The minimum amount of time that must pass before an agent can start this break. Enter the duration in the format hours:minutes.
- **Maximum Length from Shift Start**—The maximum amount of time that can pass before an agent starts this break. Enter the duration in the format hours:minutes.
- **Minimum Length from Shift End**—The minimum amount of time that must pass after an agent returns to work from this break until the end of the shift. Enter the duration in the format hours:minutes.
- **Fixed Position**—Determines whether the break has to occur at a specific point in the shift. Possible values are **None**, **Start of Shift**, and **End of Shift**.
- **Start Step**—The increments between break start times. For example, with a start step of 15 minutes, agents leave for the break 15 minutes apart.
- **Start Offset**—Sets how many minutes past the hour in the interval in which a break may occur that the start step calculation should begin. Use **Start Offset** to adjust the break start to a finer granularity than using only the start step alone. For example, if your **Start Step** is set to 15 and the **Start Offset** to 1, then breaks could start at 12:01AM, 12:16AM, 12:31AM, and so on. Enter values in hh:mm format.
- **Paid Time**—When selected, the break is paid.

Adding and Editing Meals

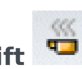
Create a new meal for each shift that is included in the schedule. For example, if your site operates 24 hours a day, you might need to create meals called *Breakfast*, *Lunch*, *Dinner*, and *Swing*.

Meals are always linked to a shift. These meals apply to all contracts associated with the shift. If a conflict arises that prevents a meal from being scheduled for an agent, the shift containing the meal cannot be assigned to the agent.

> **Tip**
> If no restrictions are involved (for example, a cafeteria with limited hours of operation), then configure regular breaks instead of meals for each shift.

Configuring Meals

To configure a meal:

1. In the **Shifts** pane, select the shift with which you want to associate this meal.
2. In the right-side pane, select **Shift Sequences**.
3. In the upper-right corner of the **Shift Sequences** pane, click **Add Meal association with shift** .
4. When the **Meals To Be Associated With Shifts** pane opens, do one of the following:
   - Add a new meal by selecting **New** . The new meal is added to the list and can be assigned to a shift.
   - Create a copy of meal by selecting it in the list and clicking **Copy** .
     You can copy the meal to the same site, by checking the **Copy** to the **Same Site** check box, or copy it to another business unit and site within the enterprise.
   - Delete a meal by selecting it in the list and clicking **Delete** . The meal is no longer associated with any shift.
   - Enter search criteria in the **Search** field (for example, the name of the meal) to quickly find the meal you want to apply or copy.
5. To assign a meal to a shift, select it and click **Apply**.
   The meal appears in the **Meals and Breaks Associated with this Shift** list.

Meals Properties

- **Meal Name**—The name of the meal. Use names, such as Lunch, Dinner, or Mid-afternoon break, that identify the meal type. The meal name must be unique within the site.
- **Meal Short Name**—Enter a short name of up to 3 characters to identify this meal. The short name appears in the Intra-Day and Agent Extended Schedule views.
- **Schedule State Group**—Select a **Schedule State Group** in the drop-down list.
- **Duration of the Meal**—The duration of this meal in one-minute increments, entered in `hh:mm` format.
- **Minimum allowed duration of the Meal**—The minimum allowed duration of this meal in one-minute increments, entered in minutes. Unchecking **Allow to change meal duration** indicates that this setting is not being used. The value must be less than the meal duration. Checking **Allow to change meal duration** and leaving the field value at `0:00` causes an error to display.
- **Earliest Start Time**—The earliest time that agents can begin to take this meal. This value plus the **Duration** cannot extend past the **Latest End Time** value.
- **Latest End Time**—The latest time that agents can complete this meal.
- **Start Step**—The increments between meal start times. For example, with a start step of 15 minutes, agents leave for lunch 15 minutes apart.
- **Paid Time**—If selected, this meal is paid. If cleared, this meal is unpaid.

Qualification

- **Min Time Before This Meal**—The minimum amount of time after the shift start time before agents are allowed to take this meal. For example, agents might be required to work for at least two hours before the meal. Enter the duration in the `hh:mm` format. The time before a meal can include breaks or other meals.
- **Min Time After This Meal**—The minimum amount of time between the meal and the shift end time. For example, agents might be required to work for at least four hours after the meal. Enter the duration in the `hh:mm` format hours:minutes. The time after a meal can include breaks or other meals.

Contracts

Contracts settings are similar to employment contracts, in that they are used to configure settings for agent availability times and days off that might be union or contractual requirements. In the same way, WFM automatically takes the **Contract** settings into consideration to produce legal schedules for every agent.

At the top of the **Contracts List** pane, use the Site Settings pane to configure settings for the selected site, such as the minimum duration for start and end of working days, start times between consecutive working days, schedule planning period type, and planning period start date.

At the top of the **Constraints** pane, click each one of the following panes to configure additional properties and define scheduling parameters:

- Constraints—Defines the basic scheduling parameters for each contract, including constraints on working hours, working days, and the duration between working days.
- Availability Patterns—Defines the default settings for the days and hours that each contract can be scheduled.
- Day-Off and Weekend Rules—Defines the default settings for the days off per planning period, weekend rules, specified days off, and consecutive days off rules.
- Synchronization—Ensures that an agent starts each workday within a user-defined time threshold.
- Shifts—Displays a list of shifts that are assigned to the selected **Contract**.
- Agents—Displays a list of agents that are associated with the selected **Contract**.
- Profiles—Displays a list of profiles that are associated with the selected **Contract**.
- Advanced Hours—Displays the **Contract** minimum and maximum hours.

In the **Shifts**, **Agents**, and **Profile** views, use the following panes to further configure **Contracts**:

Shifts:

- **Available Shifts** pane—Used to set the state of the shift assignment (**Primary** or **Secondary**) and, from a list of available shifts, select one or more to assign to (or remove from) the selected **Contract**.

Agents:

- **Associate Agents** pane—Used to assign an effective date for the selected Contract and, from a list of available agents, select one or more to associate with the selected **Contract**.

Profiles:

- **Profile Properties** pane—Used to create a new Profile, add and delete skills to/from a **Profile**, and save any changes.
- **Associate Skills** pane—Used to assign a skills level and, from a list of available skills, select one or more to associate with a **Profile**.

Contracts List Pane

Use the Contracts List pane to create new contracts or view, edit, delete, or copy existing contracts. Use the controls in the top-right corner of this pane to complete the following tasks:

Search *field*	Enter the search criteria. For example, enter the name of the contract.
New	Click this icon to create a new contract.
Delete	Click this icon to delete and existing contract.
Copy	Click this icon to copy and rename an existing contract.
Help	Click this icon to view a Help topic about the Contracts pane.
Sort	Click this icon to sort the Contracts list in ascending or descending order.

Viewing an Existing Contract

To view a list of existing contracts that are configured for the site you selected on the **Objects** pane:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select an existing site.
   All available contracts for this site are displayed in a list in the Contracts pane.

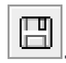
Creating a Contract

Link to video

To create a new contract:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select the site for which you want to create a contract.
3. In the upper-right corner of the **Contracts** pane, click **New** .
   The Constraints pane is displayed.
4. By default, the **Name** field is already populated with a unique name when you select **New**. The name includes a number to ensure that each newly created **Contract** has a unique name in the Configuration

database. You can change this name, but it must remain unique to prevent duplicate name errors from occurring.

5. In the **Constraints** pane, set the parameters in the **Properties** section, as required.
6. Continue to configure the additional contract properties, by selecting each tab at the top of the **Constraints** pane, as required.
   For detailed information about each pane, see Constraints, Availability Patterns, Days Off and Weekend Rules, Synchronization, Shifts, Agents, and Profiles.
7. To save the changes in each pane, click **Save** .

Deleting a Contract

To delete a contract:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select the site from which you want to delete a contract.
3. In the **Contracts** pane, select the contract that you want to delete.
4. In the upper right corner of the pane, click **Delete**  .

Copying a Contract

To copy and paste an existing contract (to create a new one):

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select the site from which you want to copy a contract.
3. From the **Contracts** list, select an existing contract.
4. In the upper right corner of the **Contracts** pane, select **Copy**  .
   The **Copy Selected Contract** pane is displayed.
5. In the **Name** field, enter the name of the contract.
6. In the **Associate Copied Contract with the Following Site** section, select the site, to which you want to associate this contract.

> **Important**
> If a **Contract** is copied to a site with different planning period than the original site, all of the contract's

planning-period-related values are reset to the default values.

7. In the upper right corner of the **Copy Contract** pane, click **Save Now**.
   The contract is displayed in **Contracts** pane with the new name.
8. To configure the contract properties, select each tab at the top of the **Constraints** pane, as required.
   For detailed information about each pane, see Constraints, Availability Patterns, Days Off and Weekend Rules, Synchronization, Shifts, Agents, and Profiles.
9. To save the changes in each pane, click **Save** .

Editing a Contract

To edit an existing contract:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select the site in which you want to edit a contract.
3. In the **Contracts** pane, select the contract that you want to edit.
   The **Constraints** pane is displayed,
4. In the drop-down list, select each properties pane that you want to edit.
5. After editing the selected pane, click **Save** .

Site Settings

At the top of the **Contracts** pane, click **Site Settings** to open the pane and configure the following settings for a selected site:

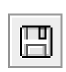
Minimum Duration Section

- **Minimum Duration Between the End of the Day and Start of Next Working Day**—Enter a time period in hours and minutes for the duration between the end of the current day and start of the next working day, or specify an unlimited duration by checking the **Unlimited** check box.
- **Minimum Duration Between the Start Times of Two Consecutive Working Days**—Enter a time period in hours and minutes for the duration between the start times of two consecutive working days, or specify an unlimited duration by checking the **Unlimited** check box.

Schedule Planning Period Section

- **Schedule Planning Period Type**—Enables you to define a period of longer than a week that can be used to set up **Contract** constraints, such as number of paid hours and number of days off. The Schedule Planning Period options are: **None**, **Monthly**, **Two Weeks**, **Three Weeks**, **Four Weeks**, **Five Weeks**, and **Six Weeks**.
- **Start Date**—Enter the date, on which the selected planning period begins.

> **Important**
>
> The start date must correspond to the **Week Start Day** value that is configured for the business unit, to which the site is assigned. Future iterations of the Schedule Planning Period will start on the same day of the week. If you selected the **Monthly** option, this field will be unavailable, and future iterations of the Schedule Planning Period will start on the first day of each calendar month.

After you have configured these settings, click **Save**  .

To reconfigure these settings, you can click the **Reset** button. Doing so, will reinstate the default settings and the Review Validation Messages pane opens, displaying the following warning message:

```
If you click Reset, all settings for Schedule Planning Period work hours and time off
for all Contracts at this location will be deleted. New Schedule Planning Period
settings will have to be entered manually. Do you want to continue?
```

Warning

If you click **Reset**, all previously entered Schedule Planning Period settings in the **Contract Constraints** and **Day off and Weekend Rules** panes are deleted, and you must reenter them for all **Contracts** in the affected site.

Click **Close** if you want to ignore the message or **Apply** in the **Review Validation Messages** pane, if you want to reset the settings.

Contract Constraints

The **Contract Constraints** pane defines the basic scheduling parameters for each contract. Use the **Constraints** pane when you create a new contract or when you edit an existing contract.

To view the **Constraints** pane for an existing contract:

1. Select **Policies > Contracts**.
2. Select an existing site in the **Objects** pane.
3. Highlight an existing contract in the existing **Contracts** list.
4. In the right-side pane, select **Constraints**.
5. After you have set the parameters in the Working Hours, Working Days, and Scheduling sections as required, in the upper right-hand corner, click **Save**.

Among other properties, you can set synchronization, which ensures that an agent starts each workday within a user-defined time threshold.

> **Important**
> You cannot create optimal schedules if you have not configured the constraints properly. Workforce Manager runs a consistency check to ensure that the minimum and maximum days off per week are compatible with the minimum and maximum days off per schedule planning period.

If you receive an error message when you are configuring **Contract** constraints, review the rules for each constraint (described in the **Working Hours** and **Working Days** tables below).

List of Contracts Retrieved in Segments

The list of **Contracts** is displayed in segments or sequential pages. When large amounts of data are being retrieved, the list of items in **Contracts** pane is displayed in smaller segments sequentially, with 50 items per page. This limits the number of items that are retrieved from WFM at any given time, maintaining optimal performance during retrieval. You can browse the previous and next pages or navigate to the first and last items in the data set (start and end of the list), by clicking the appropriate button in the view. To navigate between pages, you can use the **Up**, **Down**, **Page Up**, and **Page Down** keys on the keyboard.

Contract Constraints Properties

Contract Name—The name of the **Contract**, which must be unique within the site.

 **Icon**—The icon you want displayed for this Contract. Choose a background color that will make identification easy. Clicking the down arrow displays all available icons.

> **Tip**
>
> If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which shows a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Working Hours section

<table>
<tr><th>Setting Name</th><th>Definition</th><th>Daily Valid Values</th><th>Weekly Valid Values</th><th>Schedule Planning Period Valid Values</th></tr>
<tr><td rowspan="2">Standard Paid Hours</td><td>The paid time, in hours and minutes, that agents assigned to this contract work in a standard day, week, and (if applicable) schedule planning period.</td><td>less than 24 hours</td><td>less than 168 hours

can configure with a 1-minute time unit</td><td>less than 1008 hours (or fewer, depends on the planning period length)
can configure with a 1-minute time unit</td></tr>
<tr><td colspan="4">Rules:
• Should exclude overtime.
• Values must be greater than or equal to the Minimum Paid Hours for the same period.
• Values must be less than or equal to the Maximum Paid Hours for the same period.</td></tr>
<tr><td rowspan="2">Minimum Paid Hours</td><td>The minimum paid time, in hours and minutes, that agents assigned to this contract are required to work per day, week, and (if applicable) schedule planning period according to contractual requirements.</td><td>less than 24 hours</td><td>less than 168 hours

can configure with a 1-minute time unit</td><td>less than 1008 hours (or fewer, depends on the planning period length)
can configure with a 1-minute time unit</td></tr>
<tr><td colspan="4">Rules:
• The daily value must be more than 0.</td></tr>
</table>

<table>
<tr><th>Setting Name</th><th>Definition</th><th>Daily Valid Values</th><th>Weekly Valid Values</th><th>Schedule Planning Period Valid Values</th></tr>
<tr><td></td><td colspan="4">
This value must be less than or equal to the Standard Paid Hours value for the same period.
The daily value x Minimum Working Days per Week must be less than or equal to the weekly value.
The daily value x Minimum Working Days per Week must be less than or equal to the Maximum Paid Hours (weekly).
If you are using a schedule planning period, the weekly value x the number of weeks in the schedule period must be equal to or less than the schedule planning period value.
If the period is a month, then the number of weeks is assumed to be equal to 4.
The weekly value divided by the Maximum Daily Paid Hours value must be less than or equal to the Minimum Working Days per Week.
The weekly value can be equal to <code>0</code> if Minimum Working Days per Week is equal to <code>0</code>.
</td></tr>
<tr><td rowspan="2">Maximum Paid Hours</td><td>The maximum paid time, in hours and minutes, that agents assigned to this contract are required to work per day, week, and (if applicable) schedule planning period according to contractual requirements.</td><td>less than 24 hours</td><td>less than 168 hours

can configure with a 1-minute time unit</td><td>less than 1008 hours (depends on the planning period length)
can configure with a 1-minute time unit</td></tr>
<tr><td colspan="4">Rules
Includes all overtime and paid exceptions.
Must be greater than or equal to the Standard Paid Hours value for the same period.
The daily value x Minimum Working Days per Week must be equal to or greater than the Weekly Minimum Paid Hours value.
If you are using a schedule planning period, the weekly value x the number of weeks in the schedule planning period must be greater than or equal to the schedule planning period value.
If the period is a month, then the number of weeks is assumed to be equal to 5.
The weekly value must be equal to or greater than the Daily Minimum Paid Hours x Minimum Working Days per Week
The weekly value divided by Daily Minimum Paid Hours must be greater than or equal to the Maximum Working Days per Week.
</td></tr>
</table>

<table>
<tr><th>Setting Name</th><th>Definition</th><th>Daily Valid Values</th><th>Weekly Valid Values</th><th>Schedule Planning Period Valid Values</th></tr>
<tr><td></td><td colspan="4">The weekly period must be greater than 0.
If the period is a month, it must be less than 31 x 24 hours.</td></tr>
</table>

Working Days section

<table>
<tr><th>Setting Name</th><th>Definition</th><th>Daily Valid Values</th><th>Weekly Valid Values</th><th>Schedule Planning Period Valid Values</th></tr>
<tr><td rowspan="2">Maximum Consecutive Working Days</td><td>The maximum number of consecutive days that agents assigned to this contract type are allowed to work.</td><td>1–365 days</td><td>Not Applicable</td><td>Not Applicable</td></tr>
<tr><td colspan="4">Rules:
Must be equal to or greater than the Minimum Working Days per Week.
If Maximum Working Days per Week is less than 7, must be less than or equal to the Maximum Working Days per Week x 2.
This value can exceed the Maximum Working days per Week x 2 only when the Maximum Working days per Week is 7 and must be less than or equal to 365.
If agents have multiple assigned contracts, WFM uses the Maximum Consecutive Workdays setting from the contract on the first day of the schedule for the entire schedule. If the contract is assigned to the agent after the first day of the schedule and that contract's Maximum Consecutive Working Days setting has a different value, WFM ignores the that value.</td></tr>
<tr><td rowspan="2">Minimum Consecutive Working Days</td><td>The minimum number of consecutive days that agents assigned to this contract type must work before a scheduled day off.</td><td>2–365 days</td><td>Not Applicable</td><td>Not Applicable</td></tr>
<tr><td colspan="4">Rules:
Effective only when value is set to 2 or more days. Any value below 2 is considered not specified.
Must be equal to or greater than the Minimum Working Days per Week.
If Maximum Working Days per Week is less than 7, must be less than or</td></tr>
</table>

<table>
<tr><th>Setting Name</th><th>Definition</th><th>Daily Valid Values</th><th>Weekly Valid Values</th><th>Schedule Planning Period Valid Values</th></tr>
<tr><td></td><td colspan="4">equal to the Maximum Working Days per Week x 2.
This value can exceed the Maximum Working days per Week x 2 only when the Maximum Working days per Week is 7 and must be less than or equal to 365.
If agents have multiple assigned contracts, WFM uses the Minimum Consecutive Workdays setting from the contract on the first day of the schedule for the entire schedule. If the contract is assigned to the agent after the first day of the schedule and that contract's Minimum Consecutive Working Days setting has a different value, WFM ignores the that value.
WFM considers only days that have shifts or Granted work time ("overwrite" shift) as work days. Paid full-day exceptions and time-off are considered days off and are not counted as part of the Minimum Consecutive Working Days.</td></tr>
<tr><td rowspan="2">Minimum Working Days per Week</td><td>The minimum number of days that agents assigned to this contract must work per week.</td><td>Not Applicable</td><td>0–7 days</td><td>Not Applicable</td></tr>
<tr><td colspan="4">Rules:
Must be less than or equal to the Maximum Working Days per Week.
This value x Daily Minimum Paid Hours must less than or equal to the Weekly Maximum Paid Hours.
This value must be less than or equal to the number of available days per week set on the Availability Pattern pane.</td></tr>
<tr><td rowspan="2">Maximum Working Days per Week</td><td>The maximum number of days that agents assigned to this contract are allowed to work per week.</td><td>Not Applicable</td><td>0–7 days</td><td>Not Applicable</td></tr>
<tr><td colspan="4">Rules:
Must be greater than or equal to the Minimum Working Days per Week.
Must be less than or equal to the Weekly Maximum Paid Hours divided by Daily Minimum Paid Hours.</td></tr>
</table>

Scheduling section

The Scheduling section in the **Constraints** pane has only one parameter. The **Schedule activity sets instead of task sequences** check box, sets the scheduling mode, based on site and contract configuration before scheduling. By default, this check box is not checked.

WFM uses the following algorithm to determine the scheduling mode:

- If task sequences do not exist at the site, contracts are scheduled in Activity Set mode.
- If task sequences exist at the site, contracts are scheduled in Task Sequence mode.
- If task sequences exist at the site and the **Schedule activity sets instead of task sequences** check box is checked in a particular contract, this contract is scheduled in Activity Set mode. In this case, any shifts that have mandatory task sequences are ignored (as if they were not assigned to this contract) and shifts that have optional task sequences are scheduled without task sequences.

Web for Supervisors Views in Previous Versions

If the WFM 8.5.2 back end deployed in your environment is a version earlier than 8.5.204, the **Constraints** pane will not include the **Scheduling** section with the **Schedule activity sets instead of task sequences** check box.

> **Tip**
>
> Some constraints are common for all contracts under a site. They are set in the Contracts > Site Settings pane in WFM Web.

Availability Patterns

You use the **Contract Availability** pane when you create a new contract or when you edit an existing contract.

To view the **Availability Pattern** pane for an existing contract:

1. Select **Policies > Contracts**.
2. Select an existing site in the **Objects** pane.
3. Select an existing contract in the **Contracts** pane.
4. In the right-side pane, select **Availability Pattern**.

Use the **Availability Pattern** pane to define the days and hours that each contract can be scheduled.

You can schedule a contract only within the parameters that are set here, but you can change these hours at any time.

> **Important**
> Availability Pattern settings are not the same as Availability Preferences settings that you configured in the Calendar. Availability preferences that are requested in the Calendar apply to single agents, as do the daily availabilities that the preferences are based upon. The **Contract > Availability Pattern** tab sets the default daily availability for the entire contract type.

Overnight Availability on Last Day of Contract

The availability of the contract on the last day is not cut off at 24:00 hours, but allows overnight shifts.

Defining Availability-Pattern Hours

To define Availability Pattern hours:

1. Enter the start time and end time, in hours and minutes, that this contract must be available for work for each day of the week.
2. If the availability extends past midnight, select the **Next Day** check box.

   The maximum availability duration is 36 hours, which can occur only when the shift start time is midnight. If you use a different shift start time, you must adjust the end time to ensure that it does not violate the 36-hour maximum.

For example, if the shift start time is 1:00 AM, the maximum duration is 36 hours minus the number of hours between midnight and the start time. In this case, you must set the end time to 12:00 PM, so that the maximum duration is 35 hours.

This rule—that the duration that is set by the start time and end time must be less than or equal to 36 hours—applies to each 15–minute timestep. So, if your shift start time is 8:30 AM, the maximum duration is 36 – 8.5 = 27.5 hours. Therefore, the latest end time that you can enter by using this example is 12:00 PM.

The duration must be greater than or equal to the **Minimum Daily Working Hours**.

3. Click **Apply**.

Editing Availability Patterns

To modify the Availability Pattern:

- Select the contract, and redefine the hours on the **Availability Pattern** pane.

> **Important**
> If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which includes a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Copying and Pasting Availability Patterns

To copy and paste an Availability Pattern:

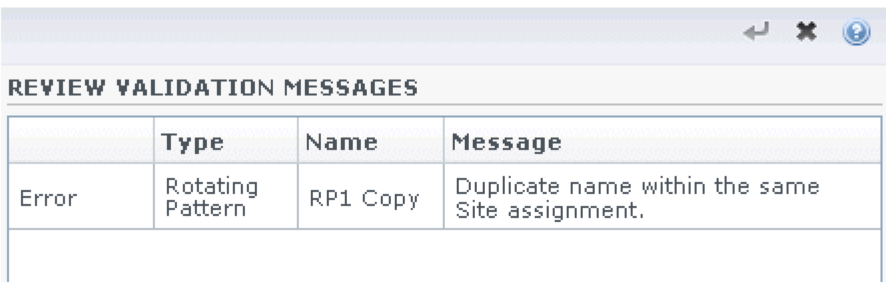
1. In the **Availability Patterns** pane, click **Copy**  for the week day you want to copy.
2. Navigate to the weekday to which you want paste the weekday, and click **Paste** .
   The **Start** and **End time** are copied to the selected week day.

Review Validation Messages

If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which includes a list of error and warning messages. These messages provide information about each constraint that is not compatible with this change or assignment. See the figures below.

The Review Messages dialog provides three options (buttons):

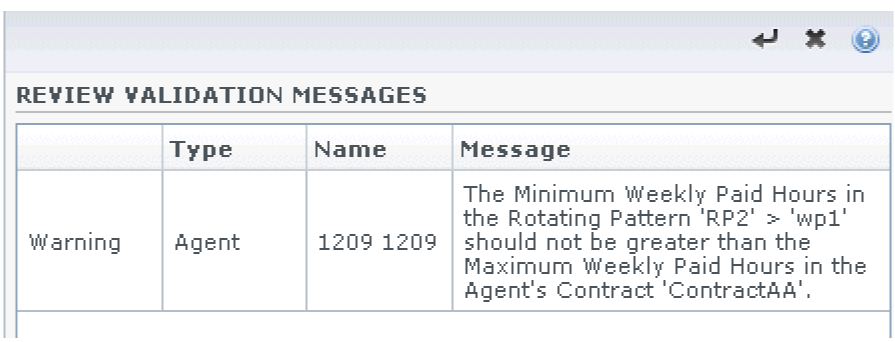
1. **Proceed**—Click to proceed with the change or assignment. (This button is disabled if the validation message is of type `Error`.)
2. **Cancel**—Click to cancel the change or assignment.
3. **Help**—Click to open a Help dialog for this topic.



REVIEW VALIDATION MESSAGES

	Type	Name	Message
Error	Rotating Pattern	RP1 Copy	Duplicate name within the same Site assignment.

Figure: Rotating Patterns Error Message



REVIEW VALIDATION MESSAGES

	Type	Name	Message
Warning	Agent	1209 1209	The Minimum Weekly Paid Hours in the Rotating Pattern 'RP2' > 'wp1' should not be greater than the Maximum Weekly Paid Hours in the Agent's Contract 'ContractAA'.

Figure: Assigning Contracts or Rotating Patterns Warning Messages

Day Off and Weekend Rules

You use the **Day Off and Weekend Rules** pane when you create a new contract or when you edit an existing contract.

To view the **Day Off and Weekend Rules** pane for an existing contract:

1. Click **Policies > Contracts**.
2. In the **Objects** pane, select the a site.
3. In the **Contracts** pane, select an existing contract.
   The **Constraints** pane is displayed by default.
4. In the right-side pane, select **Day Off and Weekend Rules**.
   The **Day Off and Weekend Rules** pane is displayed.
5. Check the **Days off per schedule planning period** check box and enter the **Minimum days off per schedule planning period** and **Maximum days off per schedule planning period**, if required.

Use the **Day Off and Weekend Rules** pane to ensure that each contract receives a set number of days off per scheduling period. You can also use this pane to configure specific rules for weekend days off and consecutive days off.

Contract Day Off and Weekend Rules Properties

Weekend Rules section

Defines the minimum and maximum number of times per user-defined schedule planning period (none, two to six weeks, or one month) that agents who are assigned to this contract must have a specified day or days off. The schedule planning period is set in **Policies > Contracts > Site Settings**.

> **Important**
> If you are making changes in **Contract** properties, **Day Off and Weekend Rules** tab or assigning agents to a **Contract**, be sure to read the topic Review Validation Messages.

A Note About Terminology

Many of the world's workers take their weekends on Saturday and Sunday, but not all. To assign a different weekend, select the first day of the weekend from the **Weekend First Day** drop-down list. Thus, you can alter a contract's settings for weekends quickly and easily with a single adjustment.

If your schedule planning period is one month, you can enter up to five **First Weekend Days**,

Second Weekend Days, and weekends off.

- **Weekend First Day**—If Saturday is the first day of this contract's weekend, keep the default setting (`Saturday`). If this contract's weekend starts on a different day, select that day from the drop-down list.

> **Tip**
>
> The value that you select here is displayed instead of **First Weekend Day in the Days Off** section.

- **Maximum Consecutive Working Weekends**—The maximum number of consecutive weekends that agents who are assigned to this contract type are allowed to work.

> **Tip**
>
> A *working weekend* is when at least one of the weekend's days is scheduled for work.

Turn the constraint `OFF` in one of two ways:

  - Set the value of value **Maximum Consecutive Working Weekends** to `0`. This is the default setting.
  - Select the **Unlimited** check box, which is located on the right side of the same line. This is the default setting.

- **Maximum Consecutive Working "Saturday"** (2nd day of the weekend)—The maximum number of consecutive 2nd day of the weekend that agents who are assigned to this contract type are allowed to work. The actual day of the week is determined by your selection in the **Weekend First Day** field.

Days Off section

- ***Friday* (or first weekend days) Are Off**—When enabled, this feature guarantees that an agent has a specified number of **First Weekend Days** off per schedule planning period. Select the minimum and maximum number of times per schedule planning period that the contract must be excluded from the **First Weekend Days** schedule.

> **Tip**
>
> The actual day of the week is listed in the label (for example, **Mondays Are Off**), and is determined by your selection in the **Weekend First Day** field.

- ***Saturday* (or second weekend days) Are Off**—When enabled, this feature guarantees that an agent has a specified number of **Second Weekend Days** off per schedule planning period. Select the minimum and maximum number of times per schedule planning period that the contract must be excluded from the **Second Weekend Days** schedule.

> ### Tip
> The actual day of the week is listed in the label (for example, **Tuesdays Are Off**), and is determined by your selection in the field **Weekend First Day** field.

- **Both Weekend Days Are Off**—When enabled, this feature guarantees that agents of the contract are scheduled with the entire weekend off. Select the minimum and maximum number of times per schedule planning period that the contract must be excluded from the weekend schedule.

> ### Tip
> If you select **Both Weekend Days Are Off**, you should still set the properties for the individual weekend days off. **Both Weekend Days Are Off** does not replace **First Weekend Days Are Off** and **Second Weekend Days Are Off**.

Consecutive Days Off Rules section

- **Minimum consecutive days off hours per week**—This setting enables you to ensure adherence with legal or company-set requirements for minimum consecutive hours off per week.

> ### Tip
> If the value is more than `24:00`, then the **Minimum Working Days per Week** constraint should not exceed 6 days, which leaves room for at least one day off to satisfy this constraint, and this constraint is satisfied if it is obeyed at least once a week.

- **Minimum number of consecutive days off per planning period**—Enter or select the minimum number of consecutive days off that agents must receive at some point during the schedule planning period.

Notes About Days Off and Weekend

The information in this section about days off and weekends is important to note when planning agent schedules.

Number of Days Off Per Period

The minimum number of days off per period is based on the lowest number of minimum days off for all contracts in that period. The maximum number of days off per period is the highest number of maximum days off for all contracts in that period.

Consecutive Days Off Per Period

The following conditions apply for consecutive days of per period when the effective start date is specified for contract assignment:

1. If the period is covered by more than one contract and all contracts have the same consecutive time off value, the constraint is retained for the entire period as if covered by only one contract.
2. If the period is covered by more than one contract and the number of days contract that is available is less than the required consecutive time off, that contract is ignored while the maximum consecutive time off constraint for the period is evaluated.
3. If the consecutive time off constraint is present in all contracts (satisfying only condition 2. above, the average consecutive time off value is calculated, based on the average total requested time off for each contract or number of contracts per period.
4. If at least one contract during the period has a consecutive time off value or `0`, that value is used for entire period.

Consecutive Working Sundays and Weekends Per Period

The consecutive working **Sundays and Weekends** per period function uses the maximum consecutive setting that is specified in the contract that is assigned on the first day of the schedule. Constraints are not violated during the contract date intervals and are handled properly on date boundaries so that the maximum value of both contracts is not exceeded.

Minimum and Maximum Saturdays, Sundays, and Weekends Per Scheduling Period

The min/max Saturdays, Sundays, and weekends per scheduling period function uses the setting that is specified in the contract that is assigned on the first day of the schedule.

If certain rules must be applied to the transitional period, a special transitional contract must be created. Therefore, if the agent needs to change his/her contract from A to B on a certain date (d0) and it is in the middle of the week or in the middle of long period, the user must create the transitional contract to start at day d1, which is the start of the week or the period. Contract B must start at the date d2, which is the start of the full week or period after d0. The application does not provide additional automation to create transitional contracts or rotating patterns.

Synchronization

You opened this pane by selecting **Synchronization** in the right-side pane in the **Contracts** view. Enable the settings on the **Synchronization** pane by selecting the **Use Synchronization of Daily Schedules** check box.

Using synchronization ensures that an agent starts each workday within a user-defined time threshold.

Synchronization includes the **Shift Start Time Flexibility** option. This option allows the schedule start/end times to vary within a specified range. Allowing some flexibility enables you to create a more optimal schedule.

Synchronization and the Schedule Planning Period

The synchronization setting and the schedule planning period affect how Workforce Management aligns agent start times:

- If the synchronization period is shorter, but fits exactly into the schedule planning period, synchronization will be complete. For example, if the synchronization period is two weeks and the schedule is six weeks, three synchronization periods exactly fit the schedule.
- If the synchronization period is shorter than the schedule planning period, only the time covered by the synchronization period will be synchronized. The rest of the schedule will not be synchronized. For example, if the synchronization period is four weeks and the schedule is six weeks, the first four weeks will be synchronized, but the final two weeks will not be.
- If the synchronization setting is longer than the schedule planning period, no synchronization will occur. For example, if synchronization is set to four weeks, but a schedule is built for three weeks, synchronization is disabled for the entire schedule.

Using Synchronization

To use synchronization:

1. Select the **Use Synchronization of Daily Schedules** check box, and then select either **Synchronize Shifts between Days Off**, **[X] Week(s) Period**, or the **Schedule Planning Period** radio button.

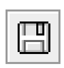
   > **Tip**
   >
   > If a **Contract** is copied to a site with different planning period than the original site, the **Use Synchronization of Daily Schedules** check box will be unchecked.

2. If you selected **[X] Week(s) Period**, enter the required number of weeks in the text box, or use the

arrows to navigate to the correct number.

3. If necessary, change the **Shift Start Time Flexibility** settings:
   - For strict start time synchronization, leave **Shift Start Time Flexibility** set to the default `00:00`.
   - To change **Shift Start Time Flexibility** settings, enter the number of minutes or hours by which the Scheduler can adjust the synchronized schedule, or highlight the hour or minute in the text box and use the arrows to adjust the selected time.
4. If necessary, change the **Synchronization Type** setting. Select one of these choices from the drop-down menu:
   - **Shift Start** (default)
   - **Shift Start and Duration**
   - **Shift Start, Duration, and Meals Status**
   - S**hift Start, Start of Meal, and Breaks**

> Tip
> **Scheduler** will attempt to synchronize by all parameters in your selection.

5. If necessary, change the **Applicable Days** setting. By default, all check boxes (**Sun**, **Mon**, **Tue**, **Wed**, **Thu**, **Fri**, **Sat**) are selected. To specify a day of the week to which synchronization does not apply, clear that day's check box. For example, to exclude the standard weekend, clear the check boxes for Saturday and Sunday.
6. To disable synchronization, clear the **Use Synchronization of Daily Schedules** check box.
7. To save the setting, click **Save**  .

Shift Synchronization For Weeks or Scheduling Periods

If synchronization is different between two contracts, the synchronization is considered separately for each contract. Synchronization between contracts with identical configuration can continue to be used, even when contracts change. For example, shift start times can be synchronized for the entire week, even if the contract changes mid-week.

Contracts are considered to have identical synchronization constraint under the following conditions:

- Contracts have the same synchronization period, week days, and start window.
- Contracts have the same synchronization type (start, start + duration) and the same list of available shifts
- Contracts have a simple configuration check that indicates that synchronization is possible.

A configuration check verifies that for the start time synchronization type, there are shifts that can start within the synchronization start time window.

In addition, the paid duration of shifts check box must be checked, for the start time and duration to synchronize, and the set of common shifts must be present in all contracts, for start, duration, and meal to synchronize.

Shift Synchronization Between Days Off

If synchronization is identical between contracts as in synchronization for weeks or scheduling periods, the contract change has no effect on synchronization. The Scheduler works as if only one contract is configured.

For non-identical synchronization configuration, synchronization does not extend outside of the contract date interval.

Team Synchronization by Contract

Before contract assignment changes, teams could easily be split into groups by contract. The groups were then synchronized as teams. When contract assignments include effective start dates, these contract groups might change during schedule scenarios. Therefore, team synchronization constraints are not longer applied to the entire scenario, but are split into smaller intervals so that agent contract assignments do not change.

Contract Shifts

The **Shifts** pane displays all available shifts that can be associated with this contract. All shifts configured for the contract site are listed. The shifts you select must have settings compatible with the contract settings. An error message appears if the settings are not compatible. If the settings for at least one day are compatible, the association is accepted. Use the **Contracts > Shifts** pane when you create a new contract or when you edit an existing contract.

To view the **Shifts** pane for an existing contract:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select a site
3. In the **Contracts** pane, select an existing contract.
   The Constraints pane is displayed by default.
4. In the right-side pane,select **Shifts**.
   The Shifts pane is displayed containing a list of shifts that are associated with this contract.

The Shifts pane displays the details for assigned shifts in the following columns:

Name	The name of the assigned shift.
Earliest Start	The earliest start time for this shift.
Latest End	The latest end time for this shift.
State	The state of the shift, either Primary or Secondary.

Use the **Shifts** pane to assign shifts to the **Contract** or change the state of an assignment.

> **Important**
> If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which includes a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Assigning a Shift To a Contract

1. In the **Contracts** pane, select a contract from the list of existing contracts.

2. Click **Assign Shifts** .
   The Available Shifts pane opens with details in the Name, Earliest Start, and Latest End columns. Alternatively, if you want to unassign a shift, click Unassign Shifts .
3. In the **Use This State for Assignments** drop-down list, select **Primary** or **Secondary**.
4. In the **Available Shifts to be Associated with Contract** section, select one or more shifts.
   Search for a specific shift by typing the shift name in the Search field, if desired.
5. To associate the shift(s) with this contract, click **Apply** .
   The selected shifts are displayed in the Shifts pane.
6. Close the **Available Shifts** pane, and on the **Shifts** pane, click **Save Changes** .
   You can configure shifts for a selected site in the Policies > Shifts view.

Removing an Assigned Shift From a Contract

1. In the **Contracts** pane, select a contract from the list of existing contracts.
2. In the **Associating Shifts for <*shift name*>** list, select the shift you want to remove and click **Unassign Shifts** .
   The shift if removed from the list.
3. In the **Shifts** pane, click **Save Changes** .

Changing the State of an Assigned Shift

1. In the **Contracts** pane, select the contract to which the shift you want to change is assigned.
2. In the **Associated Shifts for <*contract name*>** section, from the drop-down list in the **State** column, change the state to either **Primary** (default) or **Secondary**.
3. To save the changes, click **Save Changes** .
   To select multiple shifts, hold down SHIFT or CTRL and click each additional shift.

Contract Agents

You use the **Agents** pane in the **Contracts** view when you create a contract or when you edit an existing contract.

To view the agents associated with an existing contract:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select a site
3. In the **Contracts** pane, select an existing contract
   The **Constraints** pane displays by default.
4. In the right-side pane, select the **Agents**.
   The Agents pane displays containing a list of agents that are associated with this contract on the selected date.

To change the date field in the **Agents** or **Available Agents** pane, click inside the field and a calendar is displayed. Select the date, as required. If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which contains a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Use the **Contracts > Agents** pane to specify an effective start date for the selected contract and assign agents to the contract. You can also assign effective dates for contracts in the **Configuration > Agents > Contracts and Rotating Patterns** pane.

Contract Effective Dates

Contracts that are assigned to an agent have a start date that specifies when the assigned contract becomes effective. Agents can have multiple contracts with different start dates assigned to them, but all assigned contracts must have different start dates. In this way, an agent can have only one effective contract on any given day.

> **Important**
> You can specify an effective start date for an assigned contract that has daily granularity, but you cannot specify an effective start time.

Contract assignments might not always have an effective start date. If an effective start date is not specified, the contract is considered to be assigned to the agent from the *beginning of time*. The agent will have only one contract assigned from the *beginning of time*. All other assignments to that agent, must have specific effective start dates that are unique for each contract assigned.

If the agent does not have a contract assigned with no start date, it is assumed that the agent had no contract between the *beginning of time* and the earliest contract assignment.

There is no explicit end date for contract assignments. The agent has only one effective contract at the time, because an assigned contract ceases to be effective on the start date of another. The assigned contract with the latest effective start date is assumed to be effective until the *end of time*. This approach simplifies contract assignment and guarantees that contracts that are assigned to agents have no gaps in the effective intervals.

You can specify an effective start date for an assigned contract in **Contracts** on the **Agent** assignment tab, see the procedure below.

Associating an Agent With a Contract

1. In the **Contracts** pane, select a contract from the list of existing contracts.
2. Click **Show Available Agents** .
3. In the **Effective Date** field, enter the effective start date for this contact assignment.
4. Select one or more agents from the **Agents to be Associate with <*contract name*>** section.

> **Tip**
> Enter search criteria into the **Search** field and use the radio buttons to filter on **First** or **Last Name**, if the list of agents is long.

5. To associate the agent(s) with this contract, click **Apply** .
6. Close the **Available Agents** pane, and on the **Agents** pane, click **Save Changes** .

Agents—The agents that can be associated with this contract. All agents from the current site are listed.

Effective Date—The effective start date that is specified for this contract assignment.

Configuring Profiles

Profiles are descriptions of virtual agents.

You can configure multiple profiles for each contract by selecting typical sets of skills. The WFM Scheduler uses contract parameters, combined with the profiles' skill sets, to produce blank schedule scenarios that are based on profile characteristics rather than on the actual agent pool. This is especially useful if you have not yet hired agents.

These blank schedule scenarios provide you with an unlimited number of "what-if" assessments of the number of agents of each contract and skill set that might be required. You can manually assign agents into the schedule after it is built.

You can create a new profile or copy an existing profile and rename it to create a new one, or you can delete a profile.

Creating a Profile

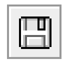
To create a new profile:

1. Click **Policies > Contracts** and then, in the **Objects** pane, select a site.
2. In the **Contracts** pane, select a specific contract.
   The **Constraints** pane displays, by default.
3. At the top of the pane, select **Profiles**.
   A list of profiles that have been created for this contract displays.
4. In the **Profiles** pane, to create a new profile, click **Add Profile**  .
5. When the **Profile Properties** opens, enter a name for the profile.
   The name should be descriptive and different from any other profile name within the contract.
6. To add skills to the profile, click **Add Skill**  .
   A list of available skills is displayed in the **Selected Skills to be Associated With Profiles** section.

   > **Tip**
   >
   > Alternatively, if you want to remove a skill, click **Delete Skill**  .

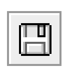
7. Select the skills you want to associate with this profile, and then, click **Add Skill**  .
8. In the **Use this Level for Assignments** field of the **Available Skills** pane, enter the correct skill level.

> ## Important
> The value that you enter will affect the profile's availability on the **Select Profiles** page of the **Schedule Scenario Wizard**. That page displays only profiles with a skill level that falls within the required range of the **Activities** that you are scheduling. For example, if you define a profile here with a Stocks & Bonds skill level of 5, and then use the wizard to create a scenario that requires a Stocks & Bonds skill level of 8–30, your profile will not appear as a choice, because 5 is not between 8 and 30.

9. Continue to add skills and set skill levels until you have fully configured the profile.
10. To save the profile setting, click **Save Changes**  .

Deleting a Profile

To delete an existing profile:

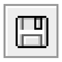
1. Click **Policies > Contracts** and then, in the **Objects** pane, select a site.
2. In the **Contracts** pane, select a specific contract.
   The **Constraints** pane displays, by default.
3. In this pane, select **Profiles**.
   A list of profiles that have been created for this contract displays.
4. In the **Associated Profiles** section, select the profile you want to delete and click **Delete Profile**  .
   The profile is removed from the list.
5. To save the changes, click **Save Changes**  .

Copying an Existing Profile

To create a new profile by copying an existing profile:

1. In the **Policies > Contracts > Profiles** pane, select an existing profile in the **Associated Profiles** section.
2. Click **Copy Selected Profile**  .
   The **Copy Selected Profile To Another Contract** pane displays.
3. In the **Name** field, rename the profile.
4. In the **Copy Selected Profile to Another Contract** section, select a contract from the list.

> **Tip**
>
> Alternatively, if you know the **Contract** name, you can type it in the **Search** field to find it quickly.

5. Click **Save Profile**  .
   The profile is added to the list of **Associated Profiles**.

> **Tip**
>
> If the contract you selected in step 4 is different from the contract selected in step 1, the copied profile is visible only after you navigate to the list of profiles under the appropriate site for this contract. If the contract selected in step 4 is the same, the copied profile is visible in the profile list immediately after it is copied.

6. Configure the profile. The settings are described in steps 7–10 above.

Advanced Hours

The **Advanced Hours** option, which opens the **Advanced Hours** pane, is used only if you are using **Monthly** schedule planning periods. For information about monthly schedule planning periods, see the **Contracts** > Site Settings tab.

The **Advanced Hours** pane defines the Contract's minimum and maximum hours.

The values in this pane override the standard Contract hours. You can use these values if you have to customize monthly workloads to handle seasonal variations in staffing requirements.

> **Tip**
> If you set the value for a month to `0`, the Contract constraints for monthly minimum and maximum working hours are used.

Rotating Patterns

Rotating Patterns are rotating work weeks, work days, work hours, and/or work activities. A Rotating Pattern can be assigned to an agent. See the following examples:

- **Example 1:** A regular Weekly Pattern might be Monday through Friday from 9:00 AM to 5:00 PM followed by a short Weekly Pattern of Tuesday through Thursday from 12:00 PM to 4:00 PM.
- **Example 2:** Agents that work four 10-hour days per week could work Monday through Thursday one week and Tuesday through Friday the next week. The combination of these alternate days off (Fridays or Mondays) comprises a Rotating Pattern.

Rotating Patterns Pane

In this pane you can view, create, delete, and copy Weekly Patterns. After creating Weekly Patterns, you can then combine them to create Rotating Patterns. You configure Rotating Patterns by the week. Therefore, you can have as many weekly rotations as you need.

The **Rotating Patterns** pane displays a list of Rotating Patterns that exist under the selected site within the enterprise.

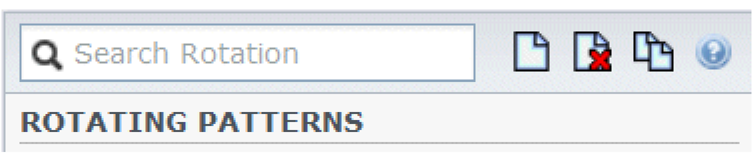


Figure: Rotating Patterns Pane Controls

Use the controls in the top-right corner of this pane to complete the following tasks:

Search *field*	Enter your search criteria. For example, the name of a Rotating Pattern.
New	Click this icon to create a new Rotating Pattern.
Delete	Click this icon to delete an existing Rotating Pattern.
Copy	Click this icon to copy an existing Rotating Pattern.
Help	Click this icon to view a Help topic about the **Rotating Patterns** pane.

You can also use the **Rotating Patterns** module to view and configure Rotating Patterns properties, and associate agents with these patterns. The **Rotating Patterns** module consists of two additional panes:

- Properties

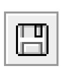
- Associated Agents

Displaying and Retrieving Rotating Patterns

The list of Rotating Patterns is displayed in segments or sequential pages. When large amounts of data are being retrieved, the list of items in **Rotating Patterns** pane is displayed in smaller segments sequentially, with 50 items per page. This limits the number of items that are retrieved from Workforce Management at any given time, maintaining optimal performance during retrieval. You can browse the previous and next pages or navigate to the first and last items in the data set (start and end of the list), by clicking the appropriate button in the view. To navigate between pages, you can use the Up, Down, Page Up, and Page Down keys on the keyboard.

Creating Rotating Patterns

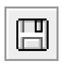
Link to video

1. At the top of the **Rotating Patterns** pane, click **New**  .
2. In the **Properties** pane, click **Add Week**  .
3. Expand the properties pane to view all fields, click **Expand**  .
4. In the **Name** field, enter a name for the Rotating Pattern.
   By default, the Name field is already populated with a unique name when you select New. The name includes a number to ensure that each newly created Rotating Pattern has a unique name in the Configuration database. You can change this name, but it must remain unique to prevent duplicate name errors from occurring.
5. In the **Weekly Patterns** section, populate the fields, as required.
6. In the **Weekly Rules for ..** section, populate the fields as required.
   For a description of the fields in the Weekly Patterns and Weekly Rules for .. sections, see Rotating Patterns Properties.
7. Click **Save Now**  .

Deleting Rotating Patterns

1. In the **Rotating Patterns** pane, select the **Rotating Pattern** that you want to delete.
2. At the top of the **Rotating Patterns** pane, click **Delete**  .
   A Confirmation dialog displays, asking if you want to proceed.
3. Click **Yes** to proceed or click **No** to cancel the deletion.
   If you select Yes to proceed, you cannot undo the deletion of the Rotating Pattern.

Copying Rotating Patterns

1. In the **Rotating Patterns** pane, click to select the Rotating Pattern in the list that you want to copy.
2. At the top of the **Rotating Patterns** pane, click **Copy**  .
   The Copy Rotating Pattern pane displays.
3. In the **Name** field, enter a name for the Rotating Pattern.
4. In the **Associate Copied Rotating Pattern With Following Site** section, click to expand each site and select the site, to which you want to copy the Rotating Pattern.
5. Click Save Now  .
   A copy of the Rotating Pattern displays with the new name in the list for the selected site.

Using Copy and Paste Within Rotating Patterns

While editing or creating Rotating Patterns, you can select, mark, or copy the settings of a single day and then copy, transfer, or distribute these settings to a single or multiple, selected days (in other words, copy once, paste multiple times). When you select a day,and click **Copy**, the **Paste** icon is enabled.

Copying a Week in Rotating Patterns

1. Select a row that displays a **Weekly Pattern** name (for example, **week1**)
2. Click **Copy**.
   The Paste icon is enabled.
3. Select the row, into which you want to paste the **week1** (for example, **week2**) and click **Paste**.
   Information from week1 is copied to week2.

See also, Weeks in Rotating Patterns.

Copying a Day in Rotating Patterns

1. Select a day row (for example, **day1**).
2. Click **Copy**.
   The Paste icon is enabled.
3. Select the row, into which you want to paste **day1** (for example, **day2**) and click **Paste**.
   Information from day1 is copied to day2.

See also, Days in Rotating Patterns.

Rotating Patterns Properties

In the **Rotating Patterns Properties** pane, you can add, copy and paste, or delete Weekly Patterns to/from a Rotating Pattern, move Weekly Patterns up or down within the list, and set various property parameters for each day within the Weekly Pattern.

See control and setting descriptions for the following panes, in addition to the Rotating Pattern Properties pane:

- Weekly Patterns Pane
- Rotating Pattern Activities Pane
- Available Activities Pane
- Shifts Pane
- Weekly Rules Pane

Weeks in Rotating Patterns

Weeks in Rotating Patterns are displayed in separate rows for each week name, with the total number of weeks displayed in the bottom-right corner of the **Properties** pane. Rotating Patterns containing a large number of weeks (for example, more than 30) display quickly on one page. You can review or edit a week, by selecting the row to open the properties for that week, or select the row to copy the entire week and paste it to other weeks. The Search function generates quick and accurate results (even when using partial search criteria).

Days in Rotating Patterns

While editing or creating Rotating Patterns, you can select, mark, or copy the settings of a single day and then copy, transfer, or distribute these settings to a single or multiple, selected days (in other words, copy once, paste multiple times). When you select a day ,and click **Copy**, the **Paste** icon is enabled.

Properties Pane

Use the control in this pane to perform the following tasks:

Expand pane	Expands the **Properties** pane to display all column in one view.
Add Week	Adds a Weekly Pattern to the Rotating Pattern.

Delete Week	Deletes the selected Weekly Pattern from the Rotating Pattern. When you click **Delete**, a **Confirmation** dialog is displayed, asking you to confirm the deletion. Click **Yes** to proceed or **No** to cancel the deletion.
Move Week Down	Moves the selected Weekly Pattern down from its original position in the Weekly Patterns list.
Move Week Up	Moves the selected Weekly Pattern up from its original position in the Weekly Patterns list.
Copy	Copies the selected Weekly Pattern. After the pattern is selected, the **Paste** icon is enabled.
Paste	Pastes the Weekly Pattern (that was selected and copied).
Help	Displays a Help topic that describes the **Properties** pane.
Save Now	Saves any changes made within the **Properties** pane.

The **Properties** pane is divided into three sections. The top section contains two fields:

- **Name**—The name of the Rotating Pattern.
- **Week Days**—The week day on which the Rotating Pattern starts.

The bottom section Weekly Patterns, is described below. Within the **Weekly Patterns** pane you can open the following panes by clicking the related field:

- Click the **Activities** field in any day row to open the Rotating Pattern Activities pane.
- Click the **Shifts** field in any day row to open the Shifts pane.
- Click the **Week <number>** (for example, **Week1**) to open the Weekly Rules pane.

Review Validation Messages

If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which includes a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Weekly Patterns Pane

This pane has the following rows and columns, which can be configured for each day of the week:

Name	The name of the Weekly Pattern for the selected day.
Weekday	The day on which the weekly pattern begins. (Monday to Sunday)
Column Descriptions:	

Day	A day within a weekly pattern.
Day Off Rule	The rules that determine whether a day off can be assigned for that day. The possible rules are: • **Day In**—A granted shift, granted any shift, or granted availability. • **Day Off Possible**—The day can be a working day or a day off depending on which provides the most optimal schedule. • **Day Off**—The day must be a day off.
Shift	The shift that is assigned for the selected day of the week. Click in this field for any day and the **Shifts** pane opens, enabling you to choose from a list of existing shifts. For a description of the controls in this pane, see Shifts pane.
Availability Time	The time that the agent is available during the shift for the selected day. In the drop-down menu, choose **Use Shift Time** or **Start/End Time**. Choosing **Start/End Time** means that the times that are set in the **Start Time** and **Estimated End Time** fields are used on that day.
Start Time	The start time for the shift on the selected day (used only if the **Start/End Time** option is set in the **Availability Time** field for the selected day).
Paid Hours/Duration	The number of hours (or duration) for which the agent is paid.
Estimated End Time	The estimated time of the shift on the selected day (used only if the **Start/End Time** option is set in the **Availability Time** field for the selected day).
Activities	The Activities that are assigned to the agent for this shift or day. Click in the field for any day and the **Rotating Patterns Activities** pane opens, from which you can select **Activities**. For a description of the controls in this pane, see Rotating Pattern Activities pane.
Week <*number*> (<**weekly pattern name**>)	The row displaying the week number (for example, **Week1**) and the name of the weekly pattern. Clicking on this row opens the Weekly Rules pane.

Rotating Pattern Activities Pane

Open this pane by clicking in the **Activities** column and see the following controls, columns, and fields:

¨ **No Activity Limitations** *check box*	When checked, all of the activities listed are assigned. If unchecked, only the selected activities are assigned to the agent for the selected day's shift.

Apply	Moves the selected activities to the **Weekly Patterns** pane.
Add Activity	Opens the Available Activities pane. When an activity is added, it is assigned to the agent for the selected day's shift. If the **No Activity Limitations** check box is checked, all of the activities listed are assigned.
Remove Activity	Removes the selected activities in the **Rotating Pattern Activities** pane.
X Close	Closes the **Rotating Pattern Activities** pane.
Help	Displays a Help topic that describes the **Rotating Pattern Activities** pane.
Search *field*	Enter the search criteria. For example, the name of the activity.
Activity Name	The name of the activity.

Available Activities Pane

Open this pane by clicking **Add Activity** in the **Activities** pane and see the following controls, columns, and fields:

Apply	Moves the selected activities to the **Rotating Patterns Activities** pane.
Close	Closes the **Available Activities** pane
Help	Displays a Help topic that describes the **Available Activities** pane.
Search *field*	Enter the search criteria. For example, the name of the activity.
Activity Name	Name of the activity.

Shifts Pane

Open this pane by clicking **Edit** in the **Shifts** column and see the following controls, columns, and fields:

¨ **Any Available Shift** *check box*	When checked enables the agent to work any available shift on the selected day. If unchecked, the agents must work the assigned shift on the selected day.
Apply	Moves the selected shift to the selected day in the weekly pattern.
Close	Closes the **Shifts** pane.

Help	Opens a Help topic for the **Shifts** pane.
Search *field*	Enables you to enter search criteria. For example, the name of a specific shift.
Name	The name of the shift.

Weekly Rules Pane

Open this pane by clicking the row containing the weekly pattern name in the **Weekly Patterns** section of the **Properties** pane, and see the following controls and fields:

Weekly Pattern Name	The name of the Weekly Pattern.
¨ **Use Weekly Paid Hours** *check box*	When checked, the **Minimum Paid Hours** and **Maximum Paid Hours** fields are enabled and can be defined by entering a minimum and maximum number of hours. When unchecked, these fields are disabled.
Minimum Paid Hours	The minimum number of hours defined for this pattern, entered in `hh:mm` format. If this constraint is set, WFM schedules the agent to work at least this many hours for this particular week of the **Schedule Planning Period**. Valid values are `00:00` to `168:00`. This value must be less than or equal to the **Maximum Weekly Paid Hours** setting in any associated contract. Must include all paid breaks and meals.
Maximum Paid Hours	The maximum number of hours defined for this pattern, entered in `hh:mm` format. If this constraint is set, WFM will schedule the agent to work no more than this many hours for this particular week of the **Schedule Planning Period**. Valid values are `00:01` to `168:00`. This value must be greater than or equal to the **Minimum Weekly Paid Hours** setting in any associated contract. Must include all paid breaks and meals.

Rotation Types

By combining the possible settings in the Weekly Pattern pane, you can create nine different types of rotation days:

1. **Day Off**—The agent must be assigned a day off on this day.
2. **Any Shift**—The agent can receive any compatible shift or a day off. In effect, the rotating pattern does not impose limitations on Scheduler for this day.
3. **Availability**—The agent can receive any shift that falls within the specified earliest start time and has the correct number of paid hours. Scheduler also has the option to assign a day off.

4. **Flexible Shift**—The agent must be assigned the specified shift, but the start time and paid hours are flexible within the limits of the shift configuration. Scheduler also has the option to assign a day off for this day.
5. **Fixed Shift**—The agent must be assigned the specified shift with the exact start time and number of paid hours that are specified. Scheduler also has the option to assign a day off for this day.
6. **Granted Fixed Shift**—The agent must be assigned the specified shift with the exact start time and number of paid hours that are specified. Scheduler cannot assign a day off for this day.
7. **Granted Flexible Shift**—The agent must be assigned the specified shift. The start time and number of paid hours can be adjusted by Scheduler. Scheduler cannot assign a day off for this day.
8. **Granted Availability**—The agent must be assigned a shift that falls within the specified earliest start time and has the correct number of paid hours. Scheduler cannot assign a day off for this day.
9. **Granted Any Shift**—The agent must be assigned a shift on this day. Scheduler cannot assign a day off for this day.

You can create a Weekly Pattern using any combination of these rotation types, as long as the combination does not conflict with paid hours and working days constraints.

Important

For **Fixed Shift** types, Scheduler can assign a shorter shift than specified in the Rotating Pattern configuration if the agent has requested a number of preferences for the scheduling period. This happens because Scheduler treats this rotation type as a preference.

Rotating Patterns Associating Agents

The **Associated Agents** pane contains a list of agents who are associated with this Rotating pattern on the selected date starting from the Rotation Week. Use this pane (within the **Rotating Patterns** pane) to associate one or more agents with a selected pattern.

Save Now	Saves any changes made within the **Associated Agents** pane.
Show Available Agents	Displays a list of available agents that you can associate with the Rotating Pattern.
Help	Displays a Help topic that describes the **Associated Agents** pane.
Show Agents assigned to this rotating pattern on following date *field*	The date that all agents in the list are actually assigned to the Rotating Pattern. Click in this field to display a calendar, from which you can select a date. Important Rotating Pattern assignment to the agent has an effective date, which is the start day when the Rotating Patterns becomes applicable to the agent. It is possible to assign multiple Rotating Patterns for the agent with the different start days. To assign Rotating Patterns to an agent, see Contracts & Rotating Patterns.
Search *field*	Enter search criteria. For example, agent's name or you can use the **Search by** radio buttons to filters the search criteria, by selecting either First name or Last name.

The Associated Agents section has the following columns:

First Name	The agent's first name.
Last Name	The agent's last name.
Current Week	The current week of the rotation on the date specified by the date picker **Show Agents assigned to this Rotating Pattern on following date**.
Contract	The name of the Contract.
Team	The name of the agent's team.

From the **Associated Agents** pane, you can open two other panes; the Available Agents pane and the Distribution pane, which are described below.

Available Agents Pane

This pane displays the following controls and fields:

Assign Agents	When clicked, associates agents with the Rotating Pattern. The agents are then displayed in the Associated Agents pane.
Distribution	When clicked, displays the Distribution pane, in which more weeks can be added to the distribution of weeks for which the Rotating Patterns apply.
X Close	Closes the **Available Agents** pane.
Help	Displays a Help topic that describes the **Available Agents** pane.
Effective Date *field*	The starting date on which the Rotating Pattern is assigned to the agent. Click the date field to display a calendar, from which you can choose a date or retain the default (current date).
Starting Week *field*	The starting week in which the Rotating Pattern starts for the agent. Select one of the existing weeks from the drop-down list.
Available Agents *list*	Lists the available agents that can be associated with Rotating Patterns. The columns in the list display the agents **First name**, **Last name**, the **Rotating Pattern Name**, **Rotation Week**, **Contract**, and **Team name**. Rotating Patterns and Contracts are displayed, based on the effective date that is selected. To view all of the columns in this list, scroll left-to-right or right-to-left, by placing your cursor in any one of the rows and use the right and left arrow keys to scroll to a column that is out of view.

Distribution Pane

This pane displays the following fields and controls:

More	When clicked, adds an additional week to the Rotating Patterns distribution.
X Close	Closes the **Distribution** pane.
Help	Displays a Help topic that describes the **Distribution** pane.
Distribution *list*	Displays the list of weeks, across which the Rotating Pattern is distributed.

Associating Agents with a Rotating Pattern

1. Select **Policies > Rotating Patterns**.
2. In the **Objects** tree, select a site, for which you want to create a Rotating Pattern.
3. In the **Rotating Patterns** pane, select a Rotating Pattern in the list.
4. In the right-side pane, select **Associated Agents**.
   The Associated Agents pane opens.
5. Click the **Show Available Agents** .
   The Available Agents pane opens.
6. In the **Effective Date** field, enter the date on which the Rotating Pattern becomes effective for the agent.
7. From the **Starting Week** drop-down list, select a starting week.
8. In the **Available Agents** list, select one or more agents.
   You can also select the appropriate Search by radio button and enter an Agents first or last name in the search field.
9. To see the distribution of the Rotating Pattern across more weeks, select **Distribution** .
   The Distribution pane is displayed.
10. To add more weeks to the displayed list, click **More** .
11. To close the **Distribution** pane, click **Close X**.
12. In the **Available Agents** pane, click the **Assign Agents** .
    The selected agents are displayed in the Associated Agents pane and are now associated with the selected Rotating Pattern and the starting week.
13. In the **Associated Agents** pane, click **Save Now** .

Review Validation Messages

If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which includes a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Configuration

Within the **Configuration** module you can access the following views, in which you can configure various WFM objects and functionality:

- Notifications
- Colors
- Shared Transport
- Agents
- Organization
- Time-Off Bidding Periods
- Schedule State Groups
- Activities
- Users
- Roles

Notifications

In the **Configuration** module, select **Notifications** to create, edit, delete, and copy emails by site for the four types of notifications listed below. The notification types that you create are listed in the Notifications pane, along with its corresponding subject. You can create the same notification types for many different sites and business units, depending on your requirements.

- Schedule Modifications
- Schedule Trade Status Changes
- Time-Off Bidding
- Time-Off Requests Status Changes

Security Permissions

You must have certain security permissions assigned in WFM Web to configure notifications. See User Security in the *Workforce Management Administrator's Guide* for a description of WFM security roles and associated privileges, and Creating Roles in this Help.

Default Setting

By default, WFM does not generate notifications. To generate notifications you must first create them, then select at least one site in the Associated Sites tab, to which the notifications will be sent and save. Once you have done so, notifications of the selected types are sent.

WFM Daemon

A Genesys server component, WFM Daemon, sends out notifications to agents and supervisors. For more information on this server component, see *Workforce Management Administrator's Guide*.

Managing Notifications

After creating notifications, you might need to edit, delete, or copy them from time to time, or you might want to add or remove certain associated sites. The following procedures describe how to perform these tasks.

Creating Notifications

To create notifications of schedule modifications:

1. In the Configuration module, select **Notifications**.
2. In the Objects tree, select a business unit.
3. In the Notifications pane, click **New**.
   The Properties tab opens by default.
4. From the Type drop-down list, select one of four notification types:
   - **Schedule Modifications**
   - **Schedule Trade Status Changes**
   - **Time-Off Bidding**
   - **Time-Off Request Status Changes**
5. At this step, choose one of two options:
   - Use the prepopulated text in the **Subject** and **Message** fields, adding any additional token variables, as required.
   - Enter new text in the **Subject** and **Messages** fields, adding token variables, as required.
6. Click **Save**.

You can now associate sites with this notification.

Editing Notifications

Tip

You cannot change the notification type when modifying notifications.

To modify the message subject or body text:

1. Delete/type over text.
2. Place the cursor where you wish to insert a token.
3. Click the appropriate token button. The token gets inserted.
4. Click **Save** on the toolbar.
   If you switch to another notification type without saving, a message asks if you wish to save or cancel.

Deleting Notifications

To delete a notification:

1. In the Notifications pane, choose the notification you want to delete.
2. Click **Delete**.
3. In the Confirmation dialog, click **Yes** to delete the notification or **No** to cancel the action.

Copying Notifications

To copy an existing notification to a different business unit:

1. In the Notifications pane, choose the notification you want to copy.
2. Click **Copy**.
3. When the Copy Notification pane opens, select a business unit and then, click **Apply**.
   The notification is now copied and associated with the business unit you selected.

Web for Supervisors Views in Previous Versions of WFM

If the WFM 8.5.2 backend deployed in your environment is prior to 8.5.203, the Notifications view displayed in the interface more closely matches the content below.

Under **Configuration**, use the **Notifications** view to create and edit emails by site for the types of notifications listed below:

- Schedule trade status changes
- Time-off request status changes
- Schedule modifications

Default Setting

By default, WFM does not generate notifications. To generate notifications, you must select at least one site to send notifications of given type in the Targets tab and save. Once you have done so, notifications of the selected types are sent.

Security Permissions

You must have certain security permissions assigned in the WFM Web. See each individual topic above for the type of permission required.

WFM Daemon

A Genesys server component, WFM Daemon, sends out notifications to agents and supervisors. For more information on this server component, see *Workforce Management Administrator's Guide*.

Properties and Site Associations

When you create email notifications, the Properties and Associated Sites panes become available for you to select the type of notification you want to send, compose the subject and body of the message, and select the sites you want to associate with them. In the Properties tab, there is some prepopulated text in the subject and message body, if you wish to use it.

Notification Properties

After selecting a notification type from the drop-down list, you will find that each of the four notifications types has the same sections in the **Properties** tab. However, the information withing these sections vary slightly, depending on which notification type you selected.

Tokens

This section contains buttons for inserting tokens into the message body.

Notification of Schedule Modifications—Available tokens related to agent time-off requests are: *Agent*, *Requested Dates*.

Notification of Schedule Trade Status Changes— Available tokens related to agent schedule trades are: *Proposing Agent*, *Responding Agent*, *Requested Dates*, *Requested Status*, *Submission Date*, *Expiration Date*.

Notification of Time-Off Bidding Changes—Available tokens related to time-off bidding requests are: *Agent*, *Bidding Status*, *Status Expiration*, *Bidding Period*, *Bidding Period Start*, *Bidding Period End*, *Team*, *Site*.

Notification of Time-Off Request Status Changes—Available tokens related to agent time-off requests are: *Agent*, *Requested Dates*, *Requested Status*, *Employee ID*, *Team*, *Site*, *Submit Date*, *Actual Status*.

Subject

This section contains Genesys-supplied subject text, which you can modify by changing text or inserting tokens.

Notification of Schedule Modifications—The supplied text is "*Message from Genesys Workforce Management: Schedule modification occurred.*"

Notification of Schedule Trade Status Changes—The supplied text is "*Message from Genesys Workforce Management: Schedule trading status changed.*"

Notification of Time-Off Bidding Changes—The supplied text is "*Message from Genesys Workforce Management: Time-Off Bidding status changed to <Bidding Status> for <Agent>.*"

Notification of Time-Off Request Status Changes—The supplied text is "*Message from Genesys Workforce Management: Time-Off Request status changed to <Requested Status> <Actual Status>.*"

Message Body

This area also contains Genesys-supplied body text, which you can modify by deleting/typing over text and inserting tokens.

Notification of Schedule Modifications—The supplied text is "*The schedule for <Agent> has been modified for the date(s) <Requested Dates>.*"

Notification of Schedule Trade Status Changes—The supplied text is "*The schedule trade proposal for <Proposing Agent> and <Responding Agent> for the date(s) <Requested Dates> has been updated with the status of <Requested Status>. Trade proposal's submission date is <Submission Date>. It will expire on <Expiration Date>.*"

Notification of Time-Off Bidding Changes—The supplied text is "*Status for agent <Agent> changed to <Bidding Status>. It is applicable to time-off bidding period <Bidding Period> with start <Bidding Period Start> and end <Bidding Period End>.*"

Notification of Time-Off Request Status Changes— The supplied text is "*<Agent> has requested time off for the date(s) <Requested Dates>. The requested time off is currently in <Requested Status> status.*"

Associating Notifications with Sites

Use this tab to select one or more sites to associate with a notification.

To associate a notification with a site:

- Expand a business unit to display its sites and make your initial selection(s) or change them at any time.

Web for Supervisors Views in Previous Versions of WFM

If the WFM 8.5.2 back end in your environment was deployed prior to release 8.5.203, the Notification properties and site associations are displayed and configured in different views. The version of your interface more closely matches the content below.

To configure notifications of schedule trade status changes, you must have the permission assigned in WFM Web. See User Security in the *Workforce Management Administrator's Guide* for a description of WFM security roles and associated privileges, and Creating Roles in this Help.

To bring up the module for notification of schedule trade status changes:

1. Select the **Configuration** tab.

2. Select **Notifications** from the **Views** menu. The Objects tree highlights **Schedule Trades Status Changes**. The Working pane shows the **Messages** tab where you configure the message **Subject**, **Body**, and variables (**Tokens**).

Messages Tab

The Messages tab has three areas: **Tokens**, **Subject**, and **Message Body**. They are described above for each Notification type. Note that some tokens and supplied text might have been added or changed in the latest release.

Modifying the Message

To modify the message subject or body text:

1. Delete/type over text.
2. Place the cursor where you wish to insert a token.
3. Click the appropriate **token** button. The token gets inserted.
4. Click **Save** on the toolbar. If you switch to another notification type without saving, a message asks if you wish to save or cancel.

Targets Tab

Use the **Targets** tab to select business units and/or sites within business units. You can expand business units to display their sites. You can select multiple sites.

Rules for Sending

After a successful save, WFM uses the specified **Subject** and **Body** and the rules listed below when sending notifications to agents and supervisors. The rules for each Notification type are described in Rules for Sending Notifications. Note that the Time-Off Bidding notification is new in 8.5.203.

Rules for Sending Notifications

This topic describes the rules that govern when and to whom WFM sends emails for each notification type. After saving notifications, WFM uses the specified **Subject**, **Body**, and rules listed below when sending them to agents and supervisors.

Schedule Modifications

When a supervisor changes one or more scheduled days, WFM sends a schedule modification notification to the affected agent in the configured site and to supervisors who have the appropriate security rights.

Schedule Trade Status Changes

WFM applies the following rules when sending notifications of trade status changes. The proposing agent is one creating the trade request; the responding agent is the one receiving the proposal:

- Both the proposing and responding agents associated with the selected sites get notified when a trade status is **User-declined**, **User-approved**, **Auto-declined**, **Auto-approved**, or **Cancelled**.
- Supervisors who have appropriate security rights are notified when a trade status is **Pending**, or changes from **Pending** to any other status.
- The responding agent is notified when the status of a trade proposal is **In Review** or **Open**.
- The proposing agent is notified when the response status of a trade proposal is **Accepted**, **In Review**, or **Cancelled**.

Double-Handshake Trade Proposals

A double-handshake trade proposal works as follows: When Agent A creates a trade proposal for Agent B (or for the community), there is a check box that asks whether or not the agent wants to manually approve the response: Check if you want to manually approve response to this trade proposal.

If this box is not checked, the order of events is:

1. Agent A creates proposal.
2. Agent B accepts proposal.
3. Trade is either automatically approved or goes into In Review state for a supervisor to review and approve, depending on the details of the trade.

If the box is checked, a double-handshake proposal is created. The order of events is then:

1. Agent A creates proposal.
2. Agent B accepts proposal.
3. Agent A needs to approve the response from Agent B.
4. Trade is either automatically approved or goes into In Review state for a supervisor to review and approve, depending on the details of the trade.

The extra approval step (3) allows Agent A to re-confirm that he wants the trade to go through.

Time-Off Bidding

WFM applies the following rules when sending notifications of time-off bidding changes:

- When an agent's status in bidding period is changed to **Waiting** or **Timed Out**, WFM sends a time-off bidding notification to the affected agent.

Time-Off Request Status Changes

WFM applies the following rules when sending notifications of time-off request status changes:

- When supervisors manually change agents' time off in the **Calendar** module, affected agents and other supervisors who have the appropriate security rights receive a notification.
- When agents request time off that are not **Auto-declined**, supervisors who have the appropriate security rights are notified.
- When automatic **Time-Off** request status changes occur, the affected agents and supervisors who have the appropriate security rights and are notified.
- When time-off balances change, supervisors who have the appropriate security rights are notified.

For a complete description of the WFM security roles and privileges, see Roles in this Help.

Colors

Within the **Configuration** module, Supervisors can use the **Colors** view to configure the colors that WFM uses in the Supervisor **Schedule** views.

- You can configure default values for these schedule items: **Activity Sets**, **Breaks**, **Days Off**, **Exceptions**, **Marked Times**, **Meals**, **Time Offs**, and **Work**.
- You can configure specific colors for: **Activity Sets**, **Exception Types**, **Marked Times**, or **Time-Off Types**.

To find items in long lists, use Search. To sort the list in ascending or descending order, click **Sort** or the **Item** column header.

Using the drop-down list, you can filter the list by **Default**, **Activity Sets**, **Exception Types**, **Marked Times**, or **Time-Off Types** to view specific items for the selected business unit and sites. If you choose **Default**, the default colors for the business unit are displayed and the **Site** column is empty.

For details about how to configure default and specific colors, see Configuring Colors.

Security Permissions

To configure colors, you must have the **Configuration > Colors in Schedule** security permission, which is assigned in WFM Web. See Configuration Role Privileges.

Configuring Colors

Use the **Colors** view to modify the default colors that appear in any Supervisors view which displays these schedule items: **Activity Sets**, **Breaks**, **Days Off**, **Exceptions**, **Marked Times**, **Meals**, **Time Offs**, and **Work**.

You can also use the **Colors** view to define specific colors for: **Activity Sets**, **Exception Types**, **Marked Times**, or **Time-Off Types**.

Defining Default Colors

To define the default colors:

1. In the **Configuration** module's drop-down menu, select **Colors**.
2. In the Colors pane drop-down menu, select **Default**.
3. In the **Item** column, click any one of the items to redefine the default background and text color for that item.

> **Tip**
>
> Use the Search or Sort controls to easily find items in long lists. Sort the **Item** column in ascending or descending order, by using the icon shown here or by clicking the column header.

4. The palette displays in the **Properties** pane. Use the top half of this pane to select a text color, and the bottom half to select a background color. View your current choices in the **Sample** text strip at the top of the **Properties** pane.
5. Choose text and background colors, by using the gradient color panel, the swatches vertical scale, or the HEX number field to define a specific color.

> **Tip**
>
> The text color is only applicable in the **Intra-Day Schedule** and **Agent-Extended Schedule** views, when you uncheck the **Full view** check box and can see the schedule items' short codes.

6. Save your choices, by clicking **Save** at the top of the window.

Tip

If you select a different item in the **Colors** pane without saving, the **Confirmation** dialog box appears, indicating that there are unsaved changes. Click **Yes** to save changes, **No** to discard them, or **Cancel** to cancel action.

Defining Specific Colors

To define specific colors:

1. In the **Configuration** module drop-down menu, select **Colors**.
2. In the **Objects** pane, select a site.
3. In the **Colors** pane drop-down menu, select **Activity Sets**, **Exception Types**, **Marked Times**, or **Time-Off Types**.
4. Make your text and background color selections in the same way that is described in steps 4-6 in the procedure above.
   Your choices will apply only to the selected items.

Resetting the Color Scheme

Click the **Reset** button in the **Properties** pane at any time to reset the color scheme.

Web for Supervisors Views in Previous Versions

If the WFM 8.5.2 back end deployed in your environment is a version earlier than 8.5.204, the Colors Tool views displayed in the interface more closely matches the controls described in the procedures below.

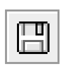
Defining Default Colors

To define the default colors:

1. Select the **Configuration** tab.
2. Select **Colors** from the **Views** menu.
3. Select the **Default** tab in the **Objects** tree.
4. Under the **Default** tab, select an item: **Activity Sets**, **Breaks**, **Days Off**, **Exceptions**, **Marked Time**, **Meals**, **Time Off**, and **Work'**.
   Your choices will redefine the background and text colors of the selected item.

5. The **Colors Tool** appears in the **Working** pane. Use the top half of the tool to select a background color, and the bottom half to select a text color. View your current choices in the sample text SAMPLE TEXT strip across the bottom of the Work pane.
6. Select one of the tabs in the top half of the **Colors Tool** to specify the method you will use to choose a background color.
Each of these color picking methods should be familiar to anyone who has chosen colors on a personal computer:
    - **Swatches** offers a series of squares with specific colors. Click a square to select its color.
    - **HSB** (Hue Saturation Brightness) offers a vertical sliding scale were you define the RGB components and a color square where you select the HSB components. You can also enter numbers in fields on the right side of the tool to define the HSB components.
    - **RGB** (Red Green Blue) offers horizontal sliding scales or number box where you define the RGB components.
    Experiment with any or all of the color picking methods until you find a satisfactory background color.
7. Select one of the tabs in the bottom half of the **Colors Tool** to specify the method you will use to choose a text color.
Experiment with any or all of the color picking methods until you find a satisfactory text color.

> **Tip**
> The text color is only applicable in the **Intra-Day Schedule** and **Agent-Extended Schedule** views, when you uncheck the **Full view** check box and can see the schedule items' short codes.

8. Save your choices, by clicking **Save**  at the top of the window.

> **Important**
> If you select a different item in the **Objects** pane without saving, the **Confirmation** dialog box appears: `There are unsaved changes. Please press Yes to save changes, No to discard changes or Cancel to cancel action.` Click **Yes**, **No**, or **Cancel**.

Defining Specific Colors, by Site

To define specific colors by site:

1. Select the **Configuration** tab.
2. Select **Colors** from the **Views** menu.
3. Select the **Specific** tab in the **Objects** pane.
4. Under the **Specific** tab, expand (▷) one of the **Types** nodes.
5. In the **Object** tree beneath the **Type** node, select one or more objects. An object can be a business unit, a site, or a specific color.
All your **Colors Tool** choices will apply only to the selected object(s).

6. Make your background color and text color selections in the same way that is described in steps 4-8 for default colors, in the default colors procedure above.

Shared Transport

Use the **Shared Transport** view to create, update, copy, delete, and manage shared transport.

> **Important**
> Shared Transport is known by many different names worldwide—bus, carpool, ride share, lift share, and paratransit, for example. See Wikipedia for details.

Accessing the Shared Transport View

Access this view in one of two ways:

- At the opening display of all WFM Web views, beneath **Configuration**, select **Shared Transport**
- Select the **Configuration** tab, click **Configuration**, and then select **Shared Transport** from the drop-down menu.

Shared Transport Pane

The toolbar above the **Shared Transport** pane contains the following controls:

New	Creates a new shared transport, which begins by opening the **Properties** tab.
Delete	Removes the selected shared transport. This command cannot be undone. A confirmation dialog box allows you to cancel or continue. This command is not enabled if the shared transport contains one or more agents who are not visible to the current user (because of a lack of permissions).
Copy	Opens the **Copy Shared Transport** pane.
Filter	Filters the shared transport list by agent or team.
Sort	Sorts the shared transport list in ascending or descending order. (You can also click the **Shared Transport** column header to sort the list.)

This pane also includes a **Search** field and **Help** icon.

Using the Shared Transport View

Use the Shared Transport view in one of two ways:

1. In the **Object** pane, select a site.

   The **Shared Transport** pane lists all shared transport groups that are associated with your selection. The list displays one shared transport group per row, with these columns:

Shared Transport	Name of the shared transport group.
Status	**Open** or **Closed**.
Comments	Descriptive comments (if any) for the shared transport group.
Size	Number of agents who are participating in the shared transport group. This number could be higher than the number of visible participants if you do not have security permissions to view all participants.
Bus	A selected check box indicates that this shared transport group is the company bus. (To designate a shared transport group as the bus, select the **Shared Transport Properties** tab and then select the **This is the Bus** check box.)

2. Select a single existing **Shared Transport** in the list, to highlight its row and open it's **Properties** tab.

Important

- If you change the shift start time or shift end time for an agent who belongs to a shared transport group, a warning message appears, at these views:
  - Master Schedule Intra-Day view
  - Scenario Intra-Day view
  - As well as when you are modifying individual agents' schedules
- You can use the **Options** dialog box to add the **Shared Transport Groups** column to the grid columns table in the **Master Schedule Intra-Day** view. This column displays the shared transport group participation for each agent on the selected day.
- For the **Scenario Intra-Day** view and **Agent Extended** view, you can use the **Options** dialog box to add the following columns: **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, and **Comments**.

Shared Transport Settings

You configure settings on three tabs in the Shared Transport view (after clicking **New** or selecting an existing shared transport):

- Properties Tab
- Participants Tab
- Join Requests Tab

At the top of all three tabs you will find the **Save** icon, which enables you to save the shared transport settings in a particular tab, and the **Help** icon.

Properties Tab

Use these controls when you are creating or updating shared transport:

Shared Transport Name *field*	Edit the name of the shared transport.
Shared Transport Status *radio buttons*	Select **Open** or **Closed**.
This is the bus *check box*	Designate this shared transport as the company bus or clear to remove that designation.
Maximum Size *field*	Enter or select the maximum number of bus riders for this shared transport. Enabled only if the **This is the bus** check box is selected (use only if this shared transport is a bus).
Comments *field*	Enter or edit the comment text.

Participants Tab

Use these controls when you are adding participants to the shared transport:

Add Agents	Enables you to add agents to the **Participants** list, by opening a list of Available Agents.
Remove Agents	Removes selected agents from the **Participants** list. This action cannot be undone.
Sort	Sorts the participants list by **First Name**, **Last Name**, or **Team**.

The **Participants** tab also displays three columns: **First Name**, **Last Name**, and **Team** name of the participants in the selected shared transport.

List of Available Agents

The **Available Agents** pane contains the following fields and controls:

Search *field*	Enables you to enter criteria, used to search for available agents.
Search by: *radio buttons*	Enables you to search for available agents by **First Name** or **Last Name**.
Apply	Applies the agents you select from the **Available Agents** list to the **Participants** list.
Close	Closes the **Available Agents** pane without applying any selections.
Sort	Sort the available agents by **First Name**, **Last Name**, or **Team**.

Join Requests Tab

Use these controls and columns when you are managing join requests:

Approve	When clicked, approves the selected requests.
Decline	When clicked, declines the selected requests.
Description of columns:	
(pending)	Shows the question mark icon (pending) until the request is approved or declined (see above) and then the icon changes accordingly.
Agent	Name of the agent who made this request to join the shared transport.
Site	Site of the agent who made this request to join the shared transport.
Team	Team of the agent who made this request to join the shared transport.
Comments	Shows any comments that relate to the **Join Request**.

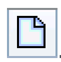
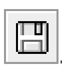
Managing Shared Transport

Use the procedures in this topic to create, delete, copy, and add participants to shared transport, and approve/decline join requests.

Creating Shared Transport

Link to video

To create shared transport:

1. In the **Objects** pane, select the site for the shared transport.
2. In the **Shared Transport** pane, click **New** .
3. When the **Properties** tab opens, enter the shared transport **Name**, **Status**, **Maximum Size**, and **Comments**.
4. If the mode of transport is a bus, check **This is the bus**.
5. Click **Save** .
6. You can now add participants to the shared transport.

Deleting Shared Transport

To delete shared transport:

1. In the **Shared Transport** pane, select the shared transport you want to delete.
2. Click **Delete** .
   When the Confirmation dialog opens click Yes to proceed or No to cancel the action. (Note that this action cannot be undone.)

Adding Participants

Link to video

To add participants to shared transport:

1. In the **Shared Transport** pane, select a shared transport and click the **Participants** tab.
2. Click **Add Agents** .
3. From the **Available Agents** list, select one or more agents.
   You cannot exceed the maximum size that you set in the Properties pane.
4. Click **Apply** .

Copying Shared Transport

Link to video

To copy shared transport:

1. In the **Shared Transport** pane, select the shared transport you want to copy.
2. Click **Copy** .
3. When the **Copy Shared Transport** pane opens, change the name for the new shared transport.
4. If desired, check the **Copy to the same Site** check box.
   Otherwise, associate a different site by expanding the Enterprise list to select a different Site.
5. Click **Apply** , and then **Save** .
   You can also choose to Close the Copy Shared Transport pane without applying your selections.

Managing Join Requests

Link to video

To approve or decline shared transport Join requests:

1. Click a shared transport that you know has pending Join requests.
2. Click the **Join Requests** tab.
3. From the **Join Requests** list, select a request with a pending status .

4. Click either **Approve** or **Decline** .
   The pending column shows a check mark (✔) or an X, depending on your choice.
5. Click **Save** .

Filtering Agents and Teams

When you have large numbers of agents and teams, you might want to use the **Filter** (found at the top of the **Shared Transport** and **Meetings** panes) to easily and conveniently group them. For example, you might want to filter agents associated with a certain team or site, or to filter teams associated with a certain site.

After you have created one or more filters they appear as bullets above the **Shared Transport** or **Meetings** list. If only one item is selected for the filter, the bullet shows the name of that item. If more than one item is selected, the bullet shows the number of items in the filter.

Filtering Agents

To create a filter for selected agents:

1. Select a site.
2. Click **Filter** .
   When the **Agents** and **Teams** tabs appear, the **Agents** tab is selected by default.
3. Click **Add** .
   The **Agents** pane opens, containing a list of available agents and the following controls:

Search *field*	Enables you to enter criteria to quickly find agents in long lists.
Search by: *radio buttons*	Enable you to search for available agents by **First Name**, **Last Name** or **Employee ID**.
Apply	Applies the agents you select from the **Available Agents** list to the **Filtered by Agents** list.
Close	Closes the **Available Agents** pane without applying any selections.
Sort	Sort the available agents by **First Name**, **Last Name**, **Employee ID**, **Site**, or **Team**.

4. Select one of more agents, and click **Apply** .
5. In the **Agents** tab, if the filter contains all selected agents, click **Apply** again.

   To remove an agent from the filter, click **Remove** before applying the filter. To close this pane without applying any of the selected items, click **Close** .

Filtering Teams

Filtering meetings by Team relies on a notion that all team members are also participants of the meeting, otherwise the meeting is filtered out. Most likely, you will filter meetings by Team when you are trying to find a meeting time that is suitable for the entire team (not just a single member of the team).

To create a filter for selected teams:

1. Select a site.
2. Click **Filter** .
   When the **Agents** and **Teams** tabs appear, select **Teams**.
3. Click **Add** .
   The **Teams** pane opens, containing a list of teams and the following controls:

Apply	Applies the selected teams to the filter and adds them to the **Filter by Teams** list.
Close	Closes the **Teams** pane and does not apply any selections.
Search *field*	Enables you to enter criteria to quickly find teams in long lists.
Sort	Sorts the **Teams** list by **Team** or **Site**

4. Select one of more teams, and click **Apply** .
5. In the **Teams** tab, if the filter contains all selected teams, click **Apply** again.

   To remove a team from the filter, click **Remove** before applying the filter. To close the **Teams** tab without applying any of the selected items, click **Close** .

Viewing and Removing Filters

The **Filters** appear at the top of the **Shared Transport** list, which now contain only the filtered items. Click any one of the bullets to see the items contained in that filter. For example, in the figure below the **Teams (2)** filter was clicked, which opened the **Teams** tab displaying the items in that filter.

To remove a filter without opening it, click the **X** in the bullet itself.

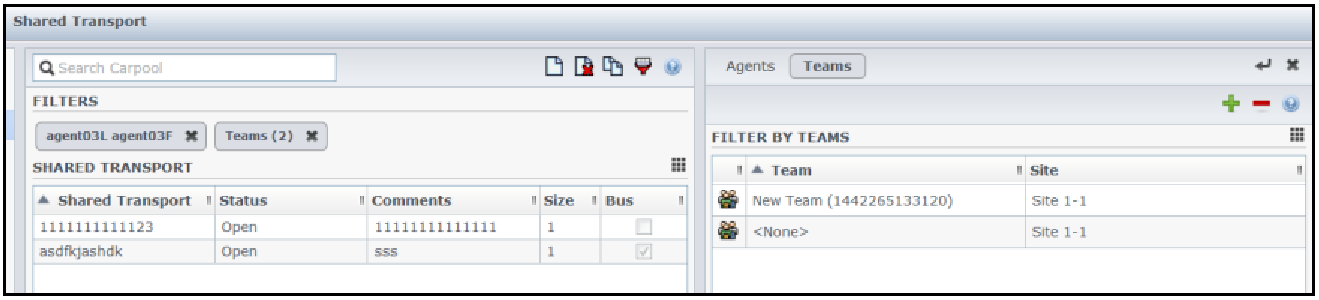


Figure: Filter Bullets in Shared Transport View

Agents

Use the **Agents** module to view and configure agent properties, and assign **Activities**, **Contracts**, or **Rotating Patterns** to agents. The Agents module consists of the two panes described below.

Agents Pane

This pane displays a list of agents in the selected site within the enterprise, with the agent's first name, last name, ID number, and hire date. Use the **Search** function to generate quick and accurate results (even when using partial search criteria).

Properties Pane

This pane enables you to configure various settings in five categories. Click to open the following panes:

1. Properties
2. Activities
3. Contracts and Rotating Patterns
4. Time Off
5. Time-Off Bonuses

Agent Properties

To view the selected agent's properties, select **Properties** at the top of the pane.

This view contains the following agent information:

First name:	The agent's first name.
Last name:	The agent's last name.
Employee ID:	The agent's employee identification number.
Site	The agent's site.
Team	The agent's team.
Email:	The email address that is used to notify agents of schedule change events, schedule trade request status changes, and time-off request status changes.
Hire Date:	The hire date that is set as the date of import when new agents are imported from Genesys Administrator. You can change the date to the agent's actual hire date. The Scheduler does not include agents whose hire date is set as a date in the future.
Termination Date:	The date on which the agent was terminated. To set a termination date for an agent, select the check box and enter a date for termination. Agent properties are maintained in the Workforce Management database, even after agents are deleted from Genesys Administrator. However, you can choose to have deleted agents hidden from view in Workforce Manager by changing the `CFG_SHOW_TERMINATED_AGENTS` setting. Click **About > Setting...** (near the **Log out** button) to open the dialog.
Hourly Wage:	Optional: A parameter that specifies the agent's hourly wage and that is used in budgeting. You can configure this option so that it appears only to users with appropriate security rights in the **Roles** module in Workforce Management Web.
Rank:	Optional: A setting that can be used as the criteria for allocating the agents preferences during scheduling. The value for any agent's ranking can contain up to 5 digits. If you do not use ranking, leave this parameter value at `0` (which is the lower rank value). The rank setting affects Workforce Management only; It is not related to the agent's ranking that is configured in Configuration Manager.
Comments:	Any comments that are related to the agent.

Save Now	To save any changes, click this icon at the top of the pane. Tip If you do not have at least one of the Edit privileges in the **Agents** view, this icon is disabled and you cannot save changes.
Help	To view a Help topic about the **Properties** pane, click this icon at the top of the pane.

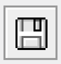
Moving Agents to Other Teams or Sites

To move an agent to another team or site:

1. In the **Agent Properties** pane, select **Move Agent** .
2. In the **Move Agent <*agent_name*> To Following Team** pane, do one of the following:
   - In the list of teams/sites, select the team or site.
   - Enter the team or site name in the **Search** field to quickly find it, and then select it.
3. Click **Apply** .

Agent Activities

To view the selected agent's activities, select **Activities** at the top of the pane. Then, use the controls in the top-right corner of this pane to complete the following tasks:

 **Add Activity**	Click to add an activity for the selected agent.
 **Delete Activity**	Click to delete an activity for the selected agent.
 **Save Now**	Click to save any changes.
 **Help**	Click to view a Help topic about the **Properties** pane.

> **Tip**
> If you do not have the Edit Activities privilege in the **Agents** view, the **Add Activity** and **Delete Activity** icons are disabled.

Activities Pane

This pane displays a list of activities that are assigned to an agent and contains detailed information in two sections (Activities and Agent's Skills) about the activities in the following columns:

Activities Section

Name	The name of the activity that is assigned to the agent (sortable column).
Site	The name of the site at which the agent is configured; It might be a site, other than the one in which the agent currently appears, if the agent was moved to another site.
Status	The agent's status, which determines the activities on which the agent is eligible to work. For example: • **Primary**—Works as if the agent became eligible for an activity, based on his/her primary skills. • **Secondary**—Works as if the agent became eligible for an activity, based on his/her secondary skills.

	• **Disabled**—Specifies explicitly that the agent cannot work on this particular activity, even if his/her skills allows it. • **Auto**—Cancels any previous explicit assignment and returns to determining the activity eligibility, based on the agent's skills.
Effective Date	The start date on which the agent becomes eligible to work on the activity with the specified status. The explicit agent activity assignment does not have an end date. One assignment must be replaced by another one. This assignment has daily granularity and uses shift days, rather than calendar days. Important You cannot specify a time of day that the effective date for activities will begin.
Skilled	Displays the agents eligibility to work on the assigned activity, based on the skill set. This value can be **Primary**, **Secondary**, or **N/A** (if the skill is disabled for agent or is absent altogether). This value is overridden by the value in the **Status** column.

In the **Activities** pane, click **Add Activity**  to open another pane, in which you can add an effective date for the Activity, set the status, and select the **Activity** to assign from a list of available Activities.

Agent's Skills Section

This section displays a list of the selected agent's current skills in three columns, as shown in the table below. To change the skill **Status** in this pane, click the drop-down list to select **Disabled**, **Primary**, or **Secondary**.

Skill	The name of the selected agent's skill.
Level	The selected agent's skill level.
Status	The selected agent's current status. Tip If you do not have the Edit Activities privilege in the **Agents** view, this column is disabled.

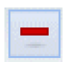
Adding an Activity

To add and activity to the selected agent:

1. Double-click the **Effective Date** field to change the date or keep the current date (default).
2. In the **Status** drop-down list, select **Primary**, **Secondary**, **Auto**, or **Disabled**.
3. In the **Activities to be Assigned to Agents** list, click an activity to assign to highlight it.
4. Click **Assign Activity**  . The activity displays in the **Activities** pane.
5. Click **X** to close the assignment pane.

Deleting an Activity

To delete an activity:

1. Select an activity.
2. Click **Delete Activity**  .
3. When the **Confirmation** dialog opens, click **Yes** to proceed or **No** to cancel the deletion.
 If you select **Yes**, you cannot undo the deletion of the activity.

Agent Contracts and Rotating Patterns

To view, add or delete the selected agent's assigned contracts or rotating patterns, select **Contracts & Rotating Patterns** at the top of the pane.

Use the controls in the top-right corner of this pane to complete the following tasks:

Add Contract or Rotating Pattern	Click to add a contract or rotating pattern for the selected agent.
Delete Contract or Rotating Pattern	Click to delete a contract or rotating pattern for the selected agent.
Save Now	Click to save any changes.
Help	Click to view a Help topic about the **Properties** pane.

> ### Tip
> If you do not have the Edit Contracts & Rotating Patterns privilege in the **Agents** view, the **Add/Delete Contracts** and **Add/Delete Rotating Patterns** icons are disabled.

This view is divided into two sections: Contracts and Rotating Patterns.

To configure contracts, see the Contracts topic in this Help file. To configure rotating patterns, see the Rotating Patterns topic.

Review Validation Messages

If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which includes a list of error and warning messages. For more information about these messages, see Review Validation Messages.

Contracts Section

The **Contracts and Rotating Patterns** pane displays a list of contracts and rotating patterns that are assigned to an agent, containing detailed information in two sections. The details for the assigned contracts are displayed in the following columns:

Name	The name of contract that is assigned to the selected agent (a sortable column).
Effective Date	A start date on which the assigned contract

	becomes effective for the agent. Agents can have multiple contracts assigned to them with different effective dates. All contracts that are assigned to an agent must have different effective dates. Therefore, on any specified day, the agent has only one effective contract. The effective date of assignment for the contract has daily granularity. • You can also assign contracts with an effective date to agents in the Agents pane. • You cannot specify a time of day that the effective date for contracts will begin.

In the **Contracts** pane, click **Add**  to open another pane, in which you can add an effective date for the contract. Then, select the contract to assign from a list of available contracts, configured under the site in the Contracts pane.

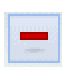
Adding Contracts

To add a contract to the selected agent:

1. Double-click the **Effective Date** field to change the date or keep the current date (default).
2. In the **Contracts to be Assigned to Agents** list, click a **Contract** to assign or highlight it.
3. Click the arrow  to assign the contract. The contract displays in the **Contracts** pane.
4. Click **X** to close the assignment pane.

Deleting Contracts

To delete a contract:

1. Select a contract.
2. Click **Delete** .
3. When the Confirmation dialog opens, click **Yes** to proceed or click **No** to cancel the deletion.
If you select Yes, you cannot undo the deletion of the contract.

Rotating Patterns Section

The detailed for the assigned rotating patterns are displayed in the following columns:

Name	The name of rotating pattern that is assigned to the selected agent (a sortable column).
Effective Date	A start date on which the assigned rotating pattern becomes effective for the agent. The agent can have multiple rotating patterns assigned to him/her with different effective dates. All rotating patterns that are assigned to an agent must have different effective dates. Therefore, on any specified day, the agent has only one effective rotating pattern. The effective date of assignment for the rotating patterns has daily granularity. • You cannot specify a time of day that the effective date for rotating patterns will begin.
Starting Week	Specifies the weekly pattern that is configured in the rotating pattern that on the effective date the agent starts to work. (For example, Week 1, Week 2, Week 3.)

In the **Rotating Patterns** section, click **Add** to open another pane, in which you can add an effective date for the rotating pattern. Then, select a starting week, the rotating pattern to assign from a list of available rotating patterns, which are configured under the site in the Rotating Patterns pane.

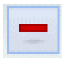
Adding Rotating Patterns

To add and rotating pattern to the selected agent:

1. Double-click the **Effective Date** field to change the date or keep the current date (default).
2. In the **Starting Week** drop-down list, select the week that you want the rotating pattern assignment to begin.
   For example, Week 1, Week 2, Week 3, etc.
3. To distribute the rotating pattern across an increased number of weeks, at the top of the pane, click the **Calendar** .
   The Distribution pane displays, containing a list of rotation weeks.
4. To increase the number of rotation weeks, click **More** .
   The number of rotation weeks in the list increases exponentially.
5. Click **X** to close the **Distribution** pane.
6. In the **Rotating Patterns to be Assigned to Agents** list, click a rotating pattern to assign by highlighting) it.
7. Click the arrow to assign the rotating pattern.
   The rotating pattern displays in the Rotating Patterns pane.
8. Click **X** to close the assignment pane.

Deleting Rotating Patterns

To delete a rotating pattern:

1. Select a rotating pattern.
2. Click **Delete**  .
3. When the Confirmation dialog opens, click **Yes** to proceed or **No** to cancel the deletion.
   If you select Yes, you cannot undo the deletion of the rotating pattern.

Agents Time Off

In the **Time Off** pane, you can add, edit, and delete Time-Off Rules and Time-Off types that are associated with selected agents. Use the controls in the top-right corner of the following panes to complete the described tasks:

Time Off Pane Controls

[[File: WM_851_icon-object_tree_checkbox_cleared.png]|alt=Show historical button] **Show Historical** *check box*	Enter a check mark to display time-off rules that contain historical data (the selected agent's time-off balance).
Associate Time-Off Rule and Time-Off Type with Agent	Click to associate the selected agent with time-off rules and time-off types.
Remove Time-Off Rule and Time-Off Type association from Agent	Click to disassociate the selected agent from time-off rules and time-off types.
Save Now	Click to save any changes.
Help	Click to view a Help topic about the **Time Off** pane.

Tip

If you do not have at least one of the Edit Time Off privilege in the **Agents** view, the **Associate** and **Remove Time-Off Rules** icons are disabled and you cannot make these changes.

Time Off Historical Data

Historical data refers to the calculated balance in time-off rules. When the **Show Historical** check box is checked or enabled, the list of time-off rules (available for selection) will include rules that have calculated balances. If you select a rule, the Time-Off Rule Assignment Properties pane opens, displaying the details of the rule's assignment, calculated carry-over balances, and time-off types. The **Show Historical** check box is cleared by default.

Time-off rules that contain historical data can be deleted, but it is not recommended, because it can affect the agent’s time-off balance.

Assigning Time-Off Rules and Types

Use the **Time-Off Rule Assignment Properties** pane to assign time-off rules and time-off types to agents, using the controls and procedures described in this topic.

Associating Time-Off Rules and Time-Off Types with Agents

To associate a time-off rule and time-off types with the selected agent:

1. In the **Agents Properties** pane, click **Time Off**.
2. Click **Associate Time-Off Rule and Time-Off Types with Agent** .
   The Time-Off Rule Assignment Properties pane opens.
3. Select a **Time-Off Rule** from the drop-down list .
4. Enter a **Start Date** and **End Date**, or click within either field to open a calendar, from which you can select a date.
   The Start Date is pre-populated with the current date, but you can change it, if necessary. If you check the box at end of the End Date field, WFM Web enters the current date automatically.
5. Click **Add Time-Off Types to a Time-Off Rule** .
   The Time-Off Types pane opens.
6. Select one or more time-off types from the list and then, click **Apply** .
   To find a specific types, enter criteria in the Search field. For example, enter the name of the each time-off type you want to find.
7. After the selected time-off types appear in the **Properties** pane, in the **Transfer Balance** column you can:
   - Leave the check box enabled (checked by default) to carry over the balance from the previous rule.
   - Clear the check box to accrue a new balance for this rule.
8. Click **Apply** .
9. In the **Time Off** pane, click **Save Now** .

Editing Time-Off Rules and Time-Off Types Associated with Agents

To edit an existing time-off rule and time-off types associated with an agent:

1. In the **Time Off** pane, select the rule you want to edit.

2. The **Time-Off Rule Assignment Properties** pane opens.
3. Make the necessary changes, following steps 3-9 in Associating Time-Off Rules and Time-Off Types with Agents.

Deleting Time Off

To delete a time-off rule and time-off types currently associated with an agent:

1. In the **Time Off** pane, select the rule you want to delete.
2. Click **Remove Time-Off Rule and Time-Off Types association from Agent** .
3. When the **Confirmation** dialog opens, click **Yes** to proceed or **No** to cancel the action.
4. In the **Time Off** pane, click **Save Now** .

Time-Off Rule Assignment Properties controls

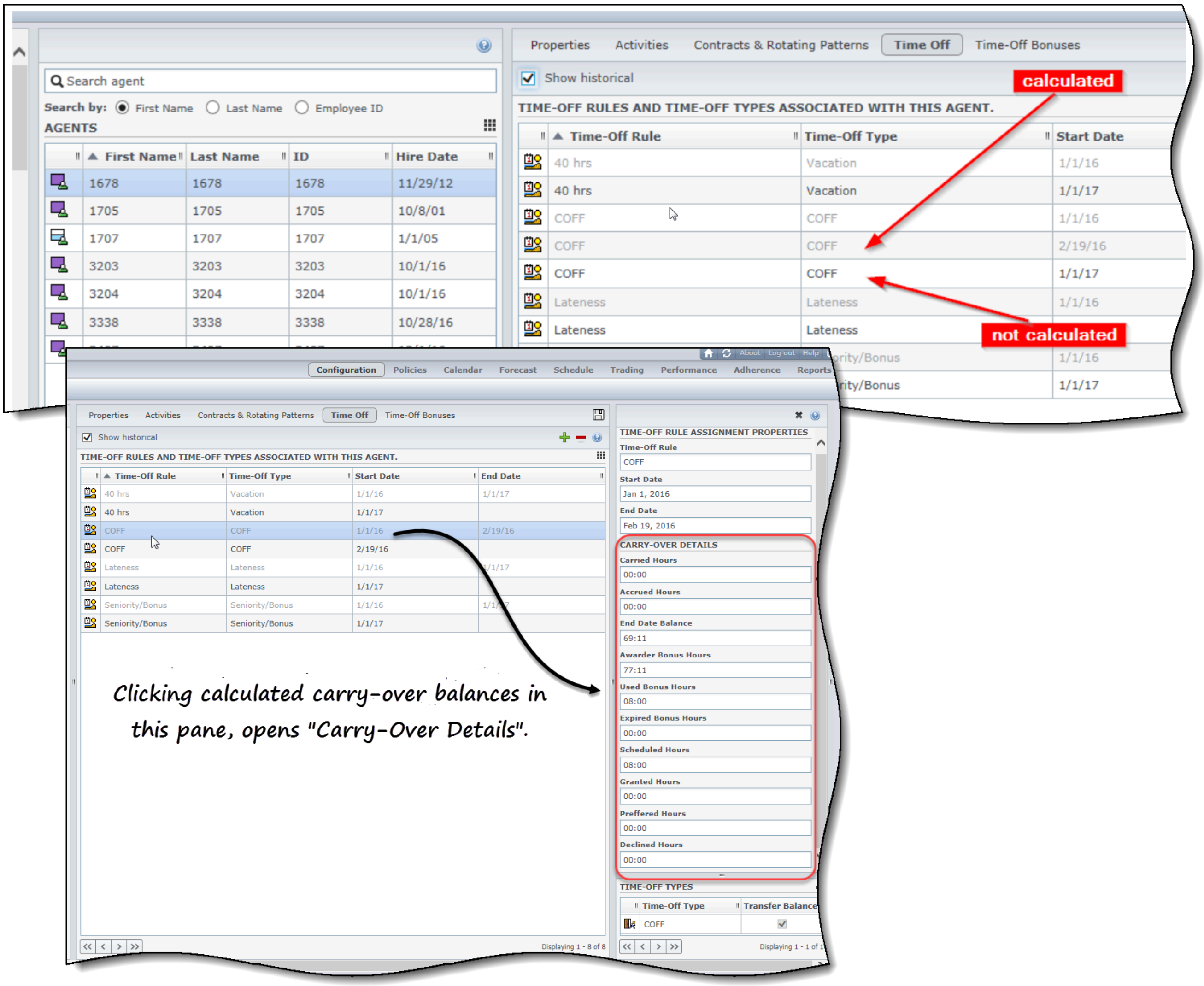
Use the following controls in the Time-Off Rule Assignment Properties pane:

- **Apply**—Click to associate the configured time-off rule and time-off types with the agent.
- **Close**—Click to close the pane.
- **Help**—Click to view a Help topic about the **Agent Time-Off Rules Properties** pane.
- **Time-Off Rules** *drop-down list*—Click to select a time-off rule that controls how the agent's time-off hours are accrued/awarded.
- **Start Date**—Click to open a calendar, from which to choose a start date for the selected time-off rule. The default date is the current day.
- **End Date**—Click to open a calendar, from which to choose an end date for the selected time-off rule.
- **Current Day** *check box*—Click to automatically populate this field with the current date.

Carry-Over Details controls

In the **Time Off** tab, time-off rules that have calculated carry-over balances are colored gray, and when selected, open the **Time-Off Rule Assignment Properties** pane, displaying the **Carry-Over Details** controls.

Time-off rules that have no calculated carry-over balance are colored black and when selected, opens the **Time-Off Rule Assignment Properties** pane without displaying the **Carry-Over Details** controls.



The carry-over details controls are:

- **Carried Hours**—The number of hours that have been carried over for this agent.
- **Accrued Hours**—The number of hours that have accrued for this agent.
- **End Date Balance**—The number of hours that are left at the end date for this rule.
- **Awarded Bonus Hours**—The number of awarded bonus hours accrued for this agent.
- **Used Bonus Hours**—The number of bonus hours that this agent has used.
- **Expired Bonus Hours**—The number of bonus hours that have expired.
- **Scheduled Hours**—The total number of scheduled hours for this agent.
- **Granted Hours**—The total number of hours that have been granted for this agent.

- **Preferred Hours**—The total number of preferred hours for this agent.
- **Declined Hours**—The total number of hours that have been declined for this agent.

Time-Off Types controls

Use the following controls in the Time-Off Types pane:

Add Time-Off Types to a Time-Off Rule	Click to add time-off types to a time-off rule.
Remove Time-Off Types from a Time-Off Rule	Click to delete time-off types from a time-off rule.
Apply	Click to apply the selected time-off types to the time-off rule assignment.
Close	Click to close the pane.
Search	Enter search criteria to find time-off types quickly.

Time-Off Bonuses

When you create time-off rules, you configure time off to be either accrued or awarded. On the other hand, time-off bonuses are awarded. You configure them (add, edit, and delete) as described in the procedures below.

> **Tip**
> If you do not have the Edit Time-Off Bonuses privilege in the **Agents** view, the **Add** and **Delete Time-Off Bonuses** icons are disabled.

Time-Off Bonus End Dates

Time-off bonuses may or may not have a set End Date property, but it's important to understand how the **End Date** property affects the way in which WFM counts unused hours when processing carry-over hours.

If the time-off bonus *has* a specified end date, WFM processes carry-over as follows:

- If the end date of the bonus time is before the carry-over date, the bonus expires and WFM does not carry over any hours.
- If the end date of the bonus is after the carry-over date, the bonus remains assigned after the carry-over date (it doesn't expire on carry-over date) and WFM fixes the used hours in the carry-over record, meaning the unused hours pass to the new carry-over period and they are not subject to the maximum carry-over hours constraint.

If the time-off bonus *does not have* a specified end date, WFM carries over the bonus hours to the next configured carry-over date. The total number of hours carried over is subject to the maximum carry-over hours constraint. The bonus expires after the carry-over date. Any used hours are updated as they were before.

Adding Time-Off Bonuses

To add a time-off bonus for a selected agent:

1. Select an agent and then, in the **Agent Properties** pane, click **Time-Off Bonuses**.
   The Agent Time-Off Bonuses pane opens.
2. Click **Add Agent Time-Off Bonus** .
   The Time-Off Bonuses Properties pane opens.
3. Select a **Time-Off Type** from the drop-down list.
4. Enter a **Start Date** and **End Date**, or click within either field to open a calendar, from which you can select a date.
   The Start Date is pre-populated with the current date, but you can change it, if necessary. If you check the box at end of the End Date field, WFM Web enters the current date automatically.
5. In the **Bonus Hours** field, enter the number of hours you want to award the selected agent.
6. In the **Comments** field, enter any additional relevant information.
7. Click **Apply** .
8. In the **Agent Time-Off Bonuses** pane, click **Save Now** .

Editing Time-Off Bonuses

To edit an existing time-off bonus:

1. In the **Agent Time-Off Bonuses** pane, select the bonus that you want to edit.
2. When the **Time-Off Bonus Properties** pane opens, make the necessary changes following the steps 3-8 in Adding Time-Off Bonuses.

Deleting Time-Off Bonuses

To delete an existing time-off bonus:

1. In the **Agent Time-Off Bonuses** pane, select the bonus you want to delete and click **Delete Agent Time-Off Bonus** .
2. When the **Confirmation** dialog opens, click **Yes** to proceed or **No** to cancel the action.
3. Click **Save Now** .

Organization

You must have security rights to the **Configuration > Organization** module to view it.

In this module, you can configure the following objects:

- Business Units
- Sites
- Time Zones

In the **Organization > Business Units** view, you can associate the following objects with a business unit:

- Sites
- Skills

In the **Organization > Sites** view, you can associate the following objects with a site:

- Teams
- Agents

Business Units

A business unit (BU) consists of a set of sites that may be grouped together because the agents at the sites perform the same activity, or for ease of management. Go to **Configuration > Organization > Business Units** to view this pane.

For monitoring purposes, you can group activity results from the various locations as a single business unit, allowing contact center managers to evaluate activity performance across locations. For display and staffing purposes, Workforce Manager splits the activity load among the sites that compose the business unit.

Use these panes to:

- Create a new business unit or edit an existing one.
- Delete a business unit.
- Copy a business unit.
- Use the Sites pane to link sites to a business unit.

Business Unit Pane Controls

Search *field*	Enter the search criteria. For example, the name of the business unit.
New	Click to create a new business unit.
Delete	Click to delete the selected business unit.
Copy	Click to copy the selected business unit to create a new one.
Help	Click to view a Help topic for the **Business Unit** pane.

When you create a business unit, the **Properties** pane is open for any selected business unit. It is the default selection in this pane. (The other selection is Sites.)

Properties Pane Controls

Save Now	Click to save the properties after you have entered them or made changes.
Help	Click to view a Help topic for the **Properties** pane.

Name *field*	Enter a name for the business unit.
Time Zone *drop-down list*	Click to select a time zone for this business unit.

Creating Business Units

To create a new business unit:

1. In the **Configuration > Organization** module, select **Business Unit**.
2. In the **Business Unit** pane, select **New** .
   By default the **Properties** pane for this business unit is open.
3. In the **Name** field, enter a name for the business unit.

> **Important**
> New Business Units are created with the default name, **New Business Unit (<*number*>)**. The BU name must be unique. Therefore, Genesys recommends that you change it to a unique name, otherwise an error message appears prompting you to edit the name.

4. In the **Time Zone** drop-down list, select a time zone for the new business unit.
5. Click **Save Now** .
   A new business unit appears.

For help with configuration of your new business unit, see Business Unit Properties.

Creating New Business Units Using Copy

To create a new business unit by copying an existing one:

1. In the **Business Unit** pane, select a business unit.
2. Click **Copy** .
   The new business unit appears in the **Business Units** list with the same time zone as the business unit you copied.
3. Do the rest of the configuration as described in Business Unit Properties and Business Unit Sites.
4. Click **Save Now** .

Business Unit Properties

When you click an existing business unit (BU) name in the **Business Units** pane, the **Business Unit Properties** pane opens by default.

Use this pane to edit the business unit:

- **Business Unit Name**—Enter a name that is unique in the WFM environment.
- **Time zone**—This shows the default time zone. To change it, select a different time zone from the drop-down box.
- **Week Start Day**—Use this drop-down menu to set the first day of the week for all Sites under the Business Unit, including the week start day when creating schedules. You can choose from any day of the week.

The week start day is important for proper scheduling and schedule-related weekly totals. WFM Web differentiates between how it displays and uses the week start day. Within the interface, where the week start day is not vital for proper data presentation, WFM uses the browser locale settings. Where the week start day is used for presentation or validation purposes, WFM uses the setting specified in the BU.

Additional Options

In the right-side pane, select Sites for additional business unit configuration options.

Business Unit Sites

The **Business Units Sites** pane enables you to select the sites you want to be included in the business unit. To open it, select a BU and in the right-side pane, click **Sites**.

Sites Pane Controls

Save Now	Click to save the properties after you have entered them or made changes.
Add Site to Business Unit	Click to add a site to a business unit. When clicked, opens a list of available sites from which to choose.
Help	Click to open a Help topic for the **Sites** pane.

Available Sites Pane Controls

Apply	Click to apply this site to the selected business unit.
Close	Click to close the **Available Sites** pane.
Help	Click to open a Help topic for the **Available Sites** pane.

Adding Sites to Business Units

To add a site to your business unit:

1. Select a business unit.
2. In the **Sites** pane, select **Add Sites to Business Unit** .
   The **Available Sites** pane opens.
3. Select a site and click **Apply** .
   The site appears in the **Sites** pane and is assigned to the selected business unit.

> **Tip**
>
> If you select a site that cannot be applied for any reason, the **Review Validation Messages** pane opens with an error description.

Sorting Sites in Lists

To sort the sites in a list, click the header of the column by which you want to sort the sites.

Business Unit Skills

Using the **Business Units > Skills** pane, you can select the skills you want to include in a business unit (BU). To open this pane, select a BU and in the right-side pane, click **Skills**.

Skills are imported into WFM automatically during synchronization, but they are first defined and assigned to agents in Genesys Administrator. In WFM, skills are assigned to business units (not sites). A skill is assigned to one business unit only and can be assigned only to activities and profiles under this business unit.

Read more about skills in the *Workforce Management Administrator's Guide*.

Skills Pane Controls

Save Now	Click to save the properties after you have entered them or made changes.
Add Skills to Business Unit	Click to add a skill to a business unit. When clicked, opens a list of available skills from which to choose.
Remove Skills from Business Unit	Click to remove a skill from a business unit.
Help	Click to open a Help topic for the **Skills** pane.

Available Skills Pane Controls

Apply	Click to apply this skill to the selected business unit.
Close	Click to close the **Available Skills** pane.
Help	Click to open a Help topic for the **Available Skills** pane.

Adding Skills to Business Units

To add a skill to your business unit:

1. Select a business unit.
2. In the **Skills** pane, select **Add Skills to Business Unit** .
   The **Available Skills** pane opens.

Important

The Available Skills pane contains unassigned skills only. To assign this same skill to another BU, you must first unassign it from this BU.

3. Select a skill and click **Apply** .
   The skill appears in the **Skills** pane and is assigned to the selected business unit.

Tip

If you select a skill that cannot be applied, the **Review Validation Messages** pane opens with an error description.

4. Click **Save Now** .

Removing Skills from Business Units

To remove a skill from a business unit:

1. In the **Skills** pane, select the skill you want to remove.
2. Click **Remove Skills from Business Unit** .
3. When the **Confirmation** dialog opens, select **Yes** to proceed or **No** to cancel the action.
4. Click **Save Now** .

Sorting and Searching Skills Lists

To sort the skills in a list:

- Click the header of the column by which you want to sort the skills.

To search for skills in a list:

- Type the skill name in the **Search** field and press **Enter**.

Business Unit Configuration

You must have the Access backend configuration security right to view the **Business Units > Configuration** pane.

Use the **Configuration** pane and the parameters described below to configure the Data Aggregator (DA) setup for the Business Unit.

- **Data Aggregator**—Select the Data Aggregator instance for this business unit. If the application selected is not validated by Genesys Configuration Server or if no application is selected, WFM uses the default value **<none>**.
    -  **Restart Data Aggregator** *icon*—Click to restart DA. (WFM Web prompts you to save any outstanding changes before restarting.)
- **Stat Server**—A read only field, containing the name of Stat Server Application that is specified in the selected Data Aggregator Application's connection properties. If there is no selected DA, or if DA Application or the Stat Server ID is invalid, this field is empty.
- **Tenant**—Enter the name of the tenant. The default value is **Environment**.
- **Tenant Password**—Enter the tenant password that was set in Genesys Administrator. If not set in Genesys Administrator, the password is blank. This value does not display in plain text.
- **Time Profile**—From the drop-down list, select a time profile. This list is populated with data from Stat Server Application's **Options\TimeProfiles** section. The default value is **<none>**.

Sites

Sites can be equivalent to switches, which are defined in Genesys Configuration Manager and imported into WFM.

You can 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.

Go to **Configuration > Organization** and select **Sites**. Now you can:

- Create new sites
- Edit sites
- Delete sites
- Associate agents with sites
- Distribute agents between teams.

Site Properties

When you create a site or select an existing one, the properties for that site are displayed in the **Site Properties** pane. At the top of this pane, you can view additional configuration settings for the site, by selecting Teams or Agents.

The fields in the **Properties** pane are:

- **Name**—Enter a name for a new site or edit the existing one. The name must be unique in the WFM environment.
- **Associated Switch**—A read-only field that shows the switch associated with the site as configured in Genesys Administrator.
- **Maximum Number of Seats**—The maximum number of seats in the center. This places a limit on the number of agents that Workforce Manager can schedule at any given time. Some combinations of activity sets and task sequences might conflict with this constraint. In cases of conflict, Scheduler gives priority to the activity set.
- **Time Zone**—The default time zone. To change it, select the desired time zone from the drop-down list.
- **Business Unit**—The business unit, with which the site is associated.
- **Alarm Threshold**—The number of minutes before or after a Schedule State Group is scheduled to occur before an agent is considered severely non-adherent. Can be set to any integer between `0-1440` (24 hours). The default value is 5 minutes.
- **Allow auto-approval of schedule trades**—Check this box to enable auto-approval of this trade type. Clear it to require manual approval of all agent schedule trades.
- **Allow Agents to create Shared Transport**—Check this box to enable agents on this site to create and modify shared transport groups.
- **Paid Breaks are mandatory**—Check this box to make paid breaks mandatory during scheduling. By default, the check box is cleared. (See Tip below.)
- **Suppress Break-related warnings while scheduling**—Check this box to suppress break-related warnings during scheduling. By default, the check box is cleared. (See Tip below.)

> **Tip**
> There's more information about mandatory paid breaks, suppressing break-related warnings, and scheduling breaks and meals in conjunction with exceptions in the *Workforce Management Administrator's Guide*.

The following check boxes exist while you are creating a new site. After the site is saved these check boxes are no longer visible:

- **Generate default Schedule State Groups and Exception Types**—Check this box to enable WFM to create default schedule state groups and exception types.

- **Associate existing exceptions with site**—Check this box to enable WFM to verify that none of the newly created exception types for the site's BU have the same name as an existing exception type. If there is duplication, WFM adds a new site to its associated sites. If no duplication exists, a new exception type is created.

Creating, Editing, and Deleting Sites

Use the following **Site** pane controls to create, edit, and delete sites:

Search *field*	Enter the search criteria. For example, the name of a site.
New	Click to add a new site.
Delete	Click to delete an existing site.
Copy	Click to copy the selected site.
Help	Click to open a Help topic for the **Sites** pane.

Creating New Sites

1. In the **Configuration** module, select **Organization > Sites**.
2. In the **Sites** pane, click **New** .
3. On the **Properties** pane, in the **Name** field, enter a name for the site.
   The name must be unique in the WFM environment.
4. In the **Maximum Number of Seats** field, enter the maximum number of seats in this site.
5. From the **Time Zone** drop-down list, select a time zone for the site.
6. From the **Business Units** drop-down list, select the business unit, with which you want to associate this site.
7. In the **Alarm Threshold** field, enter a value for the alarm.
   See Alarm Threshold, for information about this parameter.
8. Check the **Allow auto-approval of schedule trades** if you want the agents in this site to have automatic approval for any schedule trade requests. If not, leave the check box empty.
9. Check the **Allow Agents to Create Shared Transport** if you want the agents in this site to be able to make shared transport requests. If not, leave the check box empty.
10. Check the **Generate default Schedule State Groups and Exception Types** if you want WFM to create default schedule state groups and exception types. If not, leave the check box empty.
11. Check the **Associate existing exceptions with site** if you want WFM to verify that none of the newly created exception types for the site's BU have the same name as an existing exception type. If not, leave the check box empty.
12. Click **Save Now** .

For help with configuration of your new site, see Site Properties.

Creating Sites Using Copy

To create a new site by copying an existing one:

1. In the **Sites** pane, select a site and click **Copy** .
2. In the **Properties** pane, rename the new site and configure the properties, if required.

Although some of the configuration settings transfer from the original to the copy, you must do the rest of the configuration as described in Site Properties and Associating Agents with a Site.

Editing Sites

To configure a site or edit its configuration:

1. In the **Sites** pane, select it.
2. Enter the appropriate settings as described in Site Properties.
   Settings on the **Agents** pane are described in Associating Agents with a Site.

Deleting Sites

To delete an existing site:

1. In the **Sites** pane, select the site you want to delete.
2. Select **Delete** .
3. When the **Confirmation** dialog opens, click **Yes** to continue or **No** to retain the selected site and it's properties.

Associating Teams with a Site

You can associate teams with an existing site or with a newly created site, by selecting **Teams** at the top of the **Properties** pane.

The **Teams** pane controls are described below.

Teams Pane Controls

Save Now	Click to save the configuration in the **Teams** pane.
Create Team	Click to create a new team within the site.
Delete Team	Click to delete the selected team from the site.
Help	Click to open a Help topic for the **Teams** pane.

You can sort the **Team** list, by clicking the **Team Name** column header.

When you create a new team, the **Team Properties** pane opens. Agents who are associated with the selected team appear in the **Team Properties** pane.

When you click **Add Agent to Team** ( ), agents appear in the **Available Agents** pane and can be filtered by **Last Name**, **First Name**, or **Employee ID**. By default, all agents to which you have access appear in this pane. You can edit the team name, add or remove agents from the team, and remove agents from the site

Team Properties Pane Controls

Save Now	Click to save the configuration in the **Team Properties** pane.
Close	Click to close the **Team Properties** pane.
Help	Click to open a Help topic for the **Team Properties** pane.
Name *field*	Enter a name for the team.
Add Agent to Team	Click to add agents to the team.

Remove Agent from Team	Click to remove agents from the team.
Remove Agent from Site	Click to remove agents from the site.

When you add agents to a team, the **Available Agents** pane opens. See the Available Agents Pane Controls. You can filter this list to display only agents from certain business unit(s) or the entire enterprise, and to include unassigned agents in the enterprise or business unit. See Agent Filter.

To sort agents in the **Available Agents** pane, click any one of the column headers.

Adding and Removing Agents from a Team

To add an agent to a team:

1. In the **Teams** pane, click **Add Agents to Team** .
   The **Available Agents** pane opens.
2. Select an agent from the list and click **Apply** . (Use CRTL or SHIFT to select several agents at a time.)
3. After you have finished assigning agents, click **Close** in the **Available Agents** pane.

To remove an agent from a team:

1. In the **Teams** pane, select the agent you want to remove. (Use CNTRL or SHIFT to select several agents at a time.)
2. Click **Remove Agent from Team** .

To remove an agent from a site:

1. In the **Teams** pane, select the agent you want to remove.
2. Click **Remove Agent from Site** .
3. Click **Save Now** .

> **Warning**
> When you move an agent from one site to another site, the agent's historical schedules are still available to be viewed and reported. However, any Calendar items

related to that agent will not be available when building future schedules for the new site. This is because items, such as Time-Off Types, Exception Types, Contracts, and Shifts, are configured separately for each site.

Associating Agents with a Site

You can associate agents with an existing site or with a newly created site, by selecting **Agents** at the top of the **Properties** pane.

The **Agents** pane has the following controls:

Agents Pane Controls

Save Now	Click to save the configuration in the **Agents** pane.
Search By *radio buttons*	Select one of three radio button to find an agent in the list: **Last Name**, **First Name**, **Employee ID**.
Search *field*	Enter the search criteria. For example, the agents first name.
Add Agent to Site	Click to add agents to the site.
Remove Agent from Site	Click to remove agents from the site.
Help	Click to open a Help topic for the **Agents** pane.

Agents who are associated with that site appear in the **Available Agents** pane and can be filtered. By default, all agents to which you have access appear in this pane.

Available Agents Pane Controls

Apply	Click to assign an agent to a site.
Close	Click to close the **Available Agents** pane.
Help	Click to open a Help topic for the **Available Agents** pane.
Search By *radio buttons*	Select one of three radio buttons to find an agent in the list: **Last Name**, **First Name**, **Employee ID**.
Search *field*	Enter the search criteria. For example, the agents first name.
	Click to filter the list of available agents, by

Filter	opening the **Agent Filter** pane. You can filter this list to display only agents from certain business unit(s) or the entire enterprise, and to include unassigned agents in the enterprise or business unit. See the figure below.

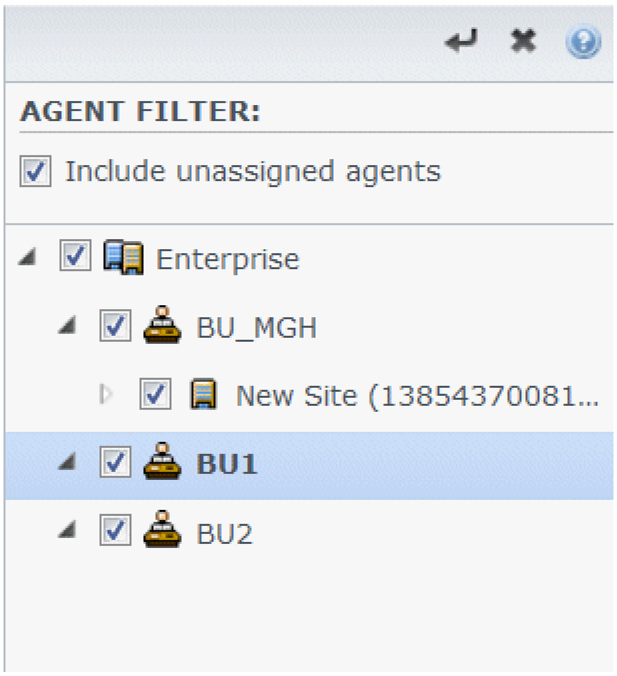


Figure: Agents Pane—Filtering

Sorting Agents in Lists

To sort agents in either the **Agents** or **Available Agents** pane, click the header of the column in which you want to sort the agents.

Adding and Removing Agents from a Site

To add an agent to a site:

1. In the **Agents** pane, click **Add Agent to Site** .
   The Available Agents pane opens.
2. Select an agent from the list and click **Apply** . (Use the CTRL or SHIFT keys to select several agents at a time.)
3. After you have finished assigning agents, click **Close** in the **Available Agents** pane.

To remove an agent from a site:

1. In the **Agents** pane, select the agent you want to remove. (Use the CTRL or SHIFT keys to select several agents at a time.)
2. Click **Remove Agent from Site**  .

Warning

When you move an agent from one site to another site, the agent's historical schedules are still available to be viewed and reported. However, any Calendar items related to that agent will not be available when building future schedules for the new site. This is because items, such as Time-Off Types, Exception Types, Contracts, and Shifts, are configured separately for each site.

Site Configuration

You must have the Access backend configuration security right to view the **Sites > Configuration** pane.

Use the **Configuration** pane and the parameters described below to configure the Data Aggregator (DA) setup for the site.

- **Data Aggregator**—Select the Data Aggregator instance for this site. If the application selected is not validated by Genesys Configuration Server or if no application is selected, WFM uses the default value <none>.
    -  **Restart Data Aggregator** *button*—Click to restart DA. (WFM Web prompts you to save any outstanding changes before restarting.)
- **Stat Server**—A read only field, containing the name of Stat Server Application that is specified in the selected Data Aggregator Application's connection properties. If there is no selected DA, or if the DA Application or Stat Server ID is invalid, this field is empty.
- **Tenant**—Enter the name of the tenant. The default value is `Environment`.
- **Tenant Password**—Enter the tenant password that was set in Genesys Administrator. If not set in Genesys Administrator, the password is blank. This value does not display in plain text.
- **Time Profile**—From the drop-down list, select a time profile. This list is populated with data from Stat Server Application's **Options\TimeProfiles** section. The default value is <none>.
- **Switch Used for Statistics**—Select the switch that will be used for handling statistics. The default value is <none>.
- **Associated Switch**—Select the switch that is associated with the site that will be used to synchronize Genesys configuration objects.
    - **Unassign Agents in case Genesys login is deleted** *check box*—Enter a check mark in this box if you want WFM to automatically unassign from this site, any agent whose login is deleted from this site.
    - **Assign agents if logins are for this Site only** *check box*—Enter a check mark in this box if you want WFM to automatically assign to this site, any agent whose login is only valid for this site.
- **Dedicated WFM Server**—Select the WFM Server instance that will be used for forecasting, scheduling, trading, and performance and adherence measurements. If the WFM Server Application option **SynchronizationLevel** is set to 1, it synchronizes agents under the **Associated Switch** selected in this pane. The default value is <none>.

Time Zones

Time zones are initially set up in Genesys Administrator and then imported into Workforce Management automatically during synchronization.

Time Zones List

The **Time Zones** list displays all time zones that were imported during synchronization. You can only apply time zones that are in this list to WFM objects, such as sites or business units.

Use the scroll bar or enter criteria into the **Search** field to find the a time zone.

Daylight Saving Information

Each seasonal daylight saving time change must be configured in advance to record historical data using the correct local time.

Synchronizing Time Zones

WFM Server transfers all time zones configured in Genesys Administrator into Workforce Management through automatic synchronization.

Synchronization overrides the daylight saving settings you have configured for time zones unless you select **Do Not Synchronize** when you configure your daylight saving offset. See Time Zone Settings for this procedure.

Time Zone Settings

You configure Time Zones by specifying new seasonal time change settings or editing the existing settings for a time zone.

Specifying Daylight Savings Information

To specify new Daylight Savings information:

1. Use the scroll bar or enter criteria into the **Search** field to find the time zone you want to edit.
2. In the **Settings** pane, **Add Daylight Saving information** to the time zone, by clicking  .
   The **Daylight Saving Information** pane opens.
3. Enter the **Start Date and Time** and the **End Date and Time** for which the offset is to be effective.

> **Important**
> You cannot enter two different time offsets for the same period. If a site and a business unit share the same time zone, the settings for both are changed when you edit information for one.

4. In the **Offset** field, enter the number of minutes that the daylight saving time differs from the standard time or click the up or down arrow button until the correct number of minutes appears.
   The offset can be negative (the clock resets to an earlier time) or positive (the clock resets to a later time). The time offset cannot be zero (`0`).

   For example, to make the change from U.S. daylight savings time to standard time (*fall back*), enter `60` as the time offset value. At the end of the time period you select, the offset is automatically reversed. In the example of U.S. daylight savings time, your system time will reset (*spring forward*) `60` minutes at the beginning of the next daylight savings time period.

> **Important**
> This offset must be a number divisible by 30.

5. Click **Apply**  to save your changes.
6. Select the **Do Not Synchronize** check box in the **Settings** pane, if you do not want the Genesys Administrator settings to override the settings that you configure in the Workforce Management Web when automatic synchronization occurs.

> **Important**
>
> If you leave **Do Not Synchronize** unselected, automatic synchronization will affect the current year settings. For example, 2 a.m. GMT will be changed to the equivalent of that time in the PST time zone (which is GMT-8).

Editing Daylight Savings Information

To edit the Daylight Savings information:

1. In the **Time Zones** list, select the time zone that has the Daylight Saving information you want to change .
2. In the **Settings** pane, click **Daylight Savings Information** to open that pane.
3. To configure the settings, see steps in Specifying Daylight Savings Information.
4. When you are done editing, click **Apply**  to save your changes.

Deleting Daylight Savings Information

To delete Daylight Saving settings for a time zone:

1. In the **Daylight Savings Information** pane, select the click **Remove Daylight Saving Information** from time zone  .
2. When the **Confirmation** dialog opens, click **Yes** to proceed or **No** to cancel the action. Proceed with caution. If you select **Yes**, the action cannot be undone.

Time-Off Bidding

You enable WFM's time-off bidding feature by creating and configuring *bidding periods* and associating them with a site and multi-site activity (MSA). Once configured, agents who are within the site and assigned the MSA can submit multiple, concurrent time-off requests within the bidding period, which WFM processes between the specified Processing Start date/time and Closing date/time.

WFM grants these time-off requests, based on seniority and/or rank. Time-off requests that WFM cannot grant are processed after the bidding period Closing date/time if there are available slots in the time-off limits. After the Closing date/time, WFM continues to process requests, but does not wait for the agent to make changes to preferred, wait-listed requests that cannot be granted, nor does it update the agent's bidding status.

Important

To configure objects and change settings in the **Time-Off Bidding Periods** view, you must have the appropriate role privileges. See Configuration Role Privileges.

To enable the time-off (vacation) bidding feature:

1. Create the bidding period.
2. Configure its properties by entering the dates and times that you want the period to cover and the bidding period constraints.
3. Associate sites and a multi-site activity with the bidding period.

Important

Time-off requests can be granted during the bidding process only if the time-off types are associated with time-off rules that have auto-granting enabled. If auto-granting for a time-off rule is disabled or the time-off rule is not assigned to a time-off type, the request will not be processed within the bidding process. Also, if the **Allowed Agent Timeout** setting is configured for the bidding period, the time period that it represents will be wasted on these types of requests, because they can never be auto-granted. However, WFM still waits for agent to change their request to make auto-granting possible.

Entering and Changing Time-Off Requests

In the **Calendar** view, you can change the agents' time-off requests, enter new requests, or manually grant existing requests at any time, even after the bidding process has started.

In the **Time-Off Bidding** views, when the bid assignment process is in the Timed Out state, you can manually *skip* the agent. Adjust the order of processing at any time by setting agent's status to Skipped or Ready, indicating that the automatic bid process should not consider the agent's requests. When you set the agent's status to **Skipped**, the bid assignment process moves on to the next agent's request.

When Can Agents Submit or Change Requests?

Agents can enter new time-off requests at any time, even if bid assignment process has been started and their existing requests have already been processed. The new requests will be given **Preferred Wait-Listed** status, like all other requests being pooled for bidding. After entering the new requests, agents must change the request status to **Ready**.

Agents must enter time-off requests that cross the bidding period boundaries as two or more separate requests, with all of the items in each request being either fully within or fully outside of the boundaries. WFM rejects requests that straddle the boundaries. If there are existing requests of this type (due to data migration), the bid assignment process considers only that part of the request that is inside the boundaries, even if it means that only the part of request is granted.

Agent cannot delete or recall a single item in a batch request that contains multiple items; the same action is performed on all items in the request. The same rule applies if the status of time-off items in the batch changes (to Granted, Preferred, or Declined), but a supervisor can override it.

Resolution of Requests

When WFM process the bids, it uses the resolution rule that was configured for the bidding period (see Bidding Period Properties rows 10-13) and automatically resolves time-off preferences by either granting them or performing some other action, such as wait-listing. After the Closing date/time, WFM continues processing any time-off requests that were not previously processed, using resolution rules. Time-off requests submitted after the Closing date/time are processed on a FIFO basis.

How Automatic Bid Assignment Works

The automatic bid assignment process runs multiple times between the Processing Start date/time and the Closing date/time with a preset frequency using the following algorithm:

1. For each agent in status Waiting:
    - Check if agent's timeout has expired:
        - If expired, set agent to Timed Out

2. If there are still agents in status **Waiting**, which were *skipped* (above):
    - DONE. Wait until the next run.
3. Process the agent list in the predefined order and look for agents in status Entering and Ready.
    - If **Ready** or **Entering**, but the bidding period Allowed Agent Timeout = `0` (which means no waiting for the agent to change requests):
        - Attempt to grant all pending (Preferred/Wait-Listed) time-off requests within this bidding period.
        - If all pending requests have been successfully granted:
            - Set agent's status to Processed then, moves on to the next agent.
    - Some pending requests could not be granted or agent's status is **Entering**, (meaning the bidding period **Allowed Agent Timeout** value is > `0`:
        - Set agent status to Waiting.
        - Calculate waiting time, by adding the time-out duration to the next agent's availability interval.
        - DONE. Wait until the next run.
    - Continue with the next agent.

Waiting:

The time interval that the system will wait for the agent or <*wait for the agent until*> is calculated as followings:

1. Convert the current time to the agent's time zone and calculate the agent's current time.
2. If the agent is currently within the scheduled shift from the Master Schedule.
    - Calculate <*remaining shift time*> = <*shift end time*> - <*current time*>.
    - If <*bidding period configured timeout*> is less than <*remaining shift time*>, then:
        - <*wait for the agent until*> is <*current time*> + <*bidding period configured timeout*>.
        - DONE.
    - Otherwise:
        - <*remaining timeout*> = <*bidding period configured timeout*> - <*remaining shift time*>.
        - Agent's current time moves to midnight next day.
        - Calculate Next Day.
3. Or else check to see if the agent has the schedule (other than the shift including, but not limited to Day Off and/or Full-Day Exception) for the calendar day of the agent's current time.
    - <*remaining timeout*> = <*bidding period configured timeout*>
    - Agent's current time moves to midnight next day.
    - Calculate Next Day.
4. Or else use agent's Contract and check to see if the agent is currently within Contract availability.

- Proceed as with the shift above, but with <*availability end time*> instead of <*shift end time*>.

Next Day:

1. Check if there is a schedule for the day of the agent’s current time.
    - Check if it is a shift that starts at the current time or later than the current time.
        - If <*remaining timeout*> is less than <*shift duration*>:
            - <*wait for the agent until*> is <*shift start time*> + <*remaining timeout*>
            - DONE
        - Otherwise:
        - <*remaining timeout*> = <*remaining timeout*> - <*shift duration*>.
2. Or else, check if there is a Contract availability window for the day of the agent’s current time.
    - Proceed as with the shift above, but use <*availability duration*> instead of <*shift duration*>.
3. Agent's current time moves to midnight next day.
4. If Agent's current time is beyond the bidding period processing interval:
    - <*wait for the agent until*> = bidding period Closing Date and Time.
    - DONE
5. Calculate Next Day.

Web for Supervisors Views in Previous Versions

If the WFM 8.5.2 backend deployed in your environment is a version earlier than 8.5.203, the Time-Off Bidding views displayed in the interface closely matches the content in this topic with the exception of the topics Entering and Changing Time-Off Requests and Automatic Bid Assignment Algorithm, which are not applicable in versions prior to 8.5.203.

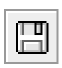
Also, agents can submit time-off requests in the same way that they always did, but WFM does not auto-grant or take any other action if they are within a configured time-off request window (even partially). WFM processes these requests on the bidding process date and time (resolution date/time).

Creating and Configuring Bidding Periods

Use the procedures and information in this topic to create, copy, delete, and suspend bidding periods.

Creating Bidding Periods

To create and configure a bidding period:

1. Select **Configuration > Time-Off Bidding Periods**.
2. Select a site within a business unit and click **New**  .
   The Properties pane opens.
3. Set the bidding period Properties.
4. Associate sites with this bidding period.
5. Click **Save Now**  .

> **Tip**
> You can create bidding periods for the same site that overlap within the Start date/time and End date/time, but the time period between the Opening date/time and Closing date/time must not overlap or intersect.

Copying Bidding Periods

If you want to create another bidding period, using the properties similar to an existing one, create a new bidding period by copying an existing one and then, make the necessary changes.

To copy a bidding period:

1. Select a bidding period in the list and click **Copy**  .
   The hierarchy of business units and sites within the enterprise is displayed.
2. In the **Name** field, enter a name for this bidding period.
3. Change the opening, processing, start, and end date/time settings, as necessary.

4. Select the site(s) that you want to associate with this bidding period and click **Save Now** .

Deleting Bidding Periods

To delete a bidding period:

1. In the **Time-Off Bidding Periods** pane, select the bidding period that you want to delete.
2. Click **Delete** .
3. When the **Confirmation** dialog opens, select **Yes** to delete the selected bidding period or **No** to cancel the action.

Suspending a Bidding Period

You can temporarily suspend the bid assignment process for the bidding period by checking **Do not process this bidding period** check box in the Properties pane. When checked, time-off requests for the bidding period are not processed. When the check box is cleared, the bid processing resumes processing where it stopped.

If the current date and time is before the Processing Start date/time or past the End date/time, processing is not resumed.

Bidding Period Properties

When you create new bidding periods you must then configure the properties. It is important that you understand the impact of these settings on the bid assignment process, especially when setting the various date and time properties for multiple bidding periods.

Properties Pane Controls

Control	Description
Name	The name of the bidding period.
Multi-Site Activity	Opens a list of multi-site activities (MSA), enabling you to associate one with a time-off bidding period. After the MSA is associated with a bidding period, agents who can perform the MSA are able to bid for time-off within that bidding period.
Opening Date and Time	The date and time that the bidding period rules

Control	Description
	begin to apply to the agent's time-off requests, and the process begins pooling the requests. Agents cannot submit requests for the bidding period before the Opening date/time. However, they can submit requests for any other bidding period configured for the same interval, if it is submitted after the Opening date/time and before the Closing date/time.
Processing Start Date and Time	The date and time that this bidding period will start process time-off requests.
Closing Date and Time	The date and time that this bidding period will finish processing time-off requests. The bid assignment process runs multiple times between the Processing Start date/time and the Closing date/time, processing the time-off requests begin pooling on the Opening date/time.
Start date and time	The date and time that this bidding period interval for time-off requests starts.
End date and time	The date and time that this bidding period interval for time-off requests ends. The Start date/time and End date/time properties dictate the interval for time-off requests that are affected by the rules of this bidding period. When setting these dates/time, there are a couple of scenarios, of which you should be aware: • **Multiple bidding periods configured for the same interval**—If you are configuring multiple bidding periods with the same Start dates/times and End dates/times, ensure that the interval between the Opening date/time and the Closing date/time do not intersect or overlap. • **Crossing boundaries of the interval**—The dates of all concurrent time-off requests must be either inside or outside of the Start date/time and End date/time interval. If agents request time off for dates that cross the bidding period boundary, they must submit separate requests, with each request inside or outside of the Start date/time and End date/time interval. When agents submit cross-interval requests, WFM rejects them.
Time zone *drop-down list*	The time zone that will be used for the dates and times set for this bidding period. You can choose the business unit time zone, if desired.
Allowed Agent Timeout	When the agent is in **Waiting** status, the time interval (in hours and minutes) in which the agent will be allowed to change their time-off requests to

Control	Description
	comply with time-off limits. If the bid assignment process finds an agent whose time-off preferences it cannot grant, it waits for the time interval specified in this property before moving on to the next agent. However, if an agent is unavailable for the entire waiting period, the bid assignment process does not count the unavailable time. The available time is determined by the agent's schedule or if the schedule is not available, his/her Contract.
Maximum number of weeks that can be requested	The maximum number of weeks that the agent can request for the entire bidding period within multiple requests.
Maximum number of days that can be requested	The maximum number of days that the agent can request for the entire bidding period within multiple requests.
Maximum number of hours that can be requested	The maximum number of hours that the agent can request for the entire bidding period within multiple requests. The default value is `0` for the **Maximum number of <*weeks, days, hours*> that can be requested**, indicating that this constraint is not observed for this bidding period. Only time-off requests made after the bidding period opening date/time are counted against the **Maximum number of <*weeks, days, hours*> settings.**
Minimum consecutive days	The minimum number of consecutive days that the agent can include in a single request. This property defines the required number of combined day-off and time-off requests for a single request. If agents have days off defined by their Contract, granted Calendar days off, or Rotating Pattern days off, then they are counted in the Minimum consecutive days parameter. In other words, agents do not have to request time off for known days off.
Allow full-day time-off requests only *check box*	When checked, agents can request only full-day time off (cannot request part-day time off).
Criteria *radio buttons*	The 4 available priorities for this bidding period; **Rank**, **Seniority**, **Seniority and Rank**, or **First come, first serve**. Requests will be granted, declined, or wait-listed, based on the selected priority. If the sorting criteria is set to **First come, first serve**, the timestamp is taken from the last date/time that the agent changed his/her bidding status to **Ready**, (not the date/time that the request was

Control	Description
	submitted).
Do not process this time-off bidding period. (It will be automatically checked by system after it was processed) *check box*	Enables you to suspend the bid assignment process if, for any reason, you need to temporarily suspend it, or if you do not want the bidding period to be processed for any reason. Be sure to save the **Properties** settings if you check this box for an existing bidding period.
Message to agents	Enables you to add any message that you feel is relevant to the agent about this bidding period.

Web for Supervisors Views in Previous Versions

If the WFM 8.5.2 backend deployed in your environment is a version earlier than 8.5.203, the Time-Off Bidding views displayed in the interface more closely matches the procedures below. The only other topic on this page applicable to versions prior to 8.5.203, is Deleting Bidding Periods.

Configuring Time-Off Bidding Periods

To configure a bidding period:

1. In the **Configuration** module, select **Configuration > Time-Off Bidding Periods**.
2. Select a site within a business unit and click **New**  .
   The Time-Off Bidding Period Properties pane opens.
3. Enter the bidding period parameters in the following fields:
   - **Name**—Enter a name for the bidding period.
   - **Processing date and time**—Enter the date and time that the requests within this bidding period will be processed.
   - **Start date and time**—Enter the date and time that this bidding period starts.
   - **End date and time**—Enter the date and time that this bidding period ends.
4. From the drop-down list, select a Time zone. (You can choose the business unit time zone, if desired.)
5. Enter a value for the **Minimum days per request**.
6. Select one of four priorities for this bidding period; **Rank**, **Seniority**, **Seniority and Rank**, or **First come, first serve**.
   Requests will be granted, declined, or wait-listed, based on the priority.
7. Check the **Do not process this time-off bidding period. (It will be automatically checked by system after it was processed)** check box if you do not want the bidding period to be processed for any reason.
8. In the **Message to agents** field, add any message that you feel is relevant to this bidding period.
9. Associate sites with this bidding period.

10. Click **Save Now** .

> ### Tip
> When saving bidding periods, if the dates for any two periods for the same site overlap, WFM displays an error message.

Copying a Bidding Period

To copy a bidding period and change the sites associated with it:

1. Select a bidding period in the list and click **Copy** .
   The hierarchy of business units and sites within the enterprise is displayed.
2. In the **Name** field, enter a name for this bidding period.
3. Select the site that you want to associate with this bidding period and click **Save Now** .

Agent Statuses in the Bidding Process

The **Status** pane in the **Time-Off Bidding** view lists agents that have submitted requests within the bidding period and sorts them in the order that they will be processed for bid assignment. You can use the **Status** pane to manually change an agent's status when managing agent time-off requests within bidding periods.

Information about agent statuses is displayed in the following columns:

- **Actions** —Clicking this icon opens the agent's time-off details in a separate window.
- **Order**—Indicates the agent's place in the bid assignment processing queue.
- **Agents**—The agent's first and last name.
- **Status**—The agent's status; Entering, Skipped, Ready, Waiting, Processed, or Timed Out.
- **Modified**—The date and time that the agent's current status was changed.
- **Waiting End Date**—The date that waiting period ends for this agent's request changes, and when the bid assignment moves on to the next agent in the queue.
- **Site**—The agent's site name.
- **Team**—The agent's team name.

How Statuses Affect Request Processing

The agent's status determines when and how their time-off requests are processed for bid assignment. For example, these statuses can be selected in the Status drop-down list:

- **Entering**—The initial (default) status assigned to the agent, indicating that the agent can enter time-off requests to be added to the bidding period queue. Agents and supervisors can set this status any time agents want to change their requests. During bid processing, WFM sets the bid assignment status to **Waiting** and sends the agent an email notification.
- **Ready**—Usually set by agent, indicating that time-off requests were submitted and are ready for processing. Agents and supervisors can set this status at any time. WFM processes the requests and sets the request status either **Processed** or **Waiting**, depending on the bid assignment rules or constraints.
- **Skipped**—Supervisors can manually set this status at any time, indicating that bid assignment process should not consider the agent's requests. WFM ignores the agent's requests during the bid assignment process.

The following statuses are set by the bid assignment process; neither supervisors nor agents can set them:

- **Waiting**—Set when the bid assignment process cannot grant all requests. It indicates that the process is waiting for the agent to enter or change his/her time-off requests. Once the waiting period is over (the date is displayed in the **Waiting End Date** column) or the process finds that all changed requests can be granted, it resumes processing.

- **Processed**—Set when all of the agent's requests have been successfully granted, or the agent has not submitted any requests. The process also checks for items that might have already been granted.
- **Timed Out**—Set when the time allotted to the agent to edit or enter time-off requests has expired. At this point, the process moves on to the next agent.

Tip

Bidding periods created before migration to the latest 8.5.2 release, will have no saved agent status records, Therefore, agents statuses will default to **Entering**, but you can change them after migration to conform to the new rules. If you make no changes to the bidding period properties after migration, the *old* bidding period functions.

Changing an Agent's Status

To change an agent's status:

1. Click the **Status** tab.
2. In the **Status** column (of the agent whose status you want to change), click the drop-down list to select **Entering**, **Ready**,**Processed**, or **Skipped**.
3. Click **Save** .

The **Modified** column displays the date and time of the change.

Viewing Time-Off Details for an Agent

1. Click the **Status** tab
2. Find the agent whose details you want to view and in the first column, click **Actions** .
The agent's time-off details open in a separate window.
3. Optionally, click **Sort** and select **Date**, **Item**, **Start Time**, **End Time**, **Paid Hours**, Status Requested, Status Actual.

What's in the Details?

The **Time-Off Details** window includes:

- The agent's name
- The period or date range within which time-off requests were made (matches the Start and End dates that you entered in Bidding Period Properties)
- A table containing detailed information in the following columns: **Date**, **Item**, **Start Time**, **End Time**, **Paid Hours**, **Status Requested**, **Status Actual**
- A **Sort**  icon, enabling you to sort by date, item, start time, end time, paid hours, status requested, or status actual.

Associating Sites and Multi-Site Activities

Workforce Management enables you to choose the way in which you associate agents with bidding periods. In most cases, associating agents by using sites is acceptable. However, you might want to achieve a more granular approach to time-off bidding by associating agents using multi-site activities (MSA).

Associating Sites with Bidding Periods

To associate one or more sites with a bidding period:

1. In the **Time-Off Bidding Periods** pane, select the bidding period that you want to associate with a site.
2. Click **Sites** and then, enter a check mark beside one or more sites.
3. Click **Save Now** .

Removing a Site from a Bidding Period

To remove a site from a bidding period:

1. Remove the check mark beside the site that you want to remove.
2. Click **Save Now** .

Associating a Multi-Site Activity with a Bidding Period

When associating a multi-site activity with a bidding period, it's best to use an MSA with configured time-off limits on which agents can bid. However, you can use multi-site activities only for agent association, if you wish.

Tip

To ensure all agents associated with the MSA are assigned to the bidding period, select all sites (in the procedure above).

To associate a multi-site activity with a bidding period:

1. In the **Time-Off Bidding Periods** pane, select the bidding period that you want to associate with a multi-site activity.
2. In the Properties pane, beside the Multi-Site Activity field, click **Edit** .
   A list of Multi-Site Activities opens in a separate pane.
3. Select an MSA and then, click **Apply** .
   The MSA appears in the MSA field in the Properties pane.

Removing a Multi-Site Activity from a Bidding Period

To remove a a multi-site activity from a bidding period:

1. In the Properties pane, click the **x** in the Multi-Site Activity field.
   The MSA is removed and the field is empty.
2. If you want to choose another MSA without removing the existing one, simply select another MSA from the list and click **Apply** .
   Your latest selection replaces the existing one in the MSA field.

If there is a long list of MSAs, use **Sort** to switch between ascending descending order, or enter the name of the MSA you want to use into the **Search** field.

Schedule State Groups

A *Schedule State Group* is a collection of schedule states that is linked to a site.

If you selected Generate Default Schedule State Groups and Exception Types when you imported the site, these Schedule State Groups appear automatically:

- Asynchronous Work
- Days Off
- Exception Types
- Fixed-Staff Work
- Immediate Work
- No Activity
- Shift Items/Meals
- Time Off

The Schedule State Group view enables you to create a new group, copy and paste an existing group, edit, and delete groups. See Configuring Schedule State Groups.

Important

To configure objects and change settings in the **Schedule State Groups** view, you must have the appropriate role privileges. See Configuration Role Privileges.

For information about setting adherence rules for Schedule State Groups, see Configuring Adherence Rules.

Schedule State Groups and Genesys States

Each schedule state group is associated with one or more Genesys states, such as `CallRinging` or `WaitForNextCall`. Each group can include an additional reason (aux) code, sent with the related Genesys state, that further identifies what the agent is doing.

Important

Aux codes are not supported for all Genesys states. The T-Server you are using dictates which Genesys states support aux codes. Check the documentation for your T-Server to determine which of the Genesys states can support aux codes.

You can apply the **Start Before Threshold** and **Start After Threshold** values to each schedule state group; these values help you track agent adherence. Configure these functions in the Adherence Rules pane.

About Schedule States

The schedule states that you can include in schedule state groups are:

- All breaks configured for the site
- All meals configured for the site
- All activities configured for the site
- All exception types configured for the site
- All time-off types configured for the site
- Fixed states, which are:
    - Generic break, meal, exception, and activity states that you can use in place of specific meals, breaks, exceptions, and activities.
    - Day Off, Vacation, No Activity

Tip

Use these Fixed States to report the state, for which an agent is scheduled when a particular schedule state type (such as an Exception Type) has been deleted from WFM.

Configuring Schedule State Groups

To create a schedule state group, you must first select a site within a business unit. When you select a schedule state group or create a new one, the **Schedule State Group Properties** pane opens.

The following topics provide information to help you create and manage your Schedule State Groups:

- Schedule State Groups Pane Controls
- State Group Properties Pane Controls
- State Type Pane Controls
- Assigning a State to Multiple Groups
- Creating Schedule State Groups
- Creating Groups Using Copy and Paste
- Editing Schedule State Groups
- Deleting Schedule State Groups

Schedule State Groups Pane Controls

Search *field*	Enter the search criteria. For example, the name of the schedule state group.
New	Click to create a new schedule state group.
Delete	Click to delete an existing schedule state group.
Copy	Click to copy and paste an existing schedule state group.
Help	Click to view a Help topic about the **Schedule State Group** pane.

State Groups Properties Pane Controls

Save Now	Click to save changes you have made in this pane.
Help	Click to view a Help topic about the **Schedule State Group Properties** pane.
Name *field*	Enter a name for the Schedule State Group.
Type drop-down list	Select a type for the Schedule State Group, such as **None** (default), **Planned Overhead**, **Unplanned Overhead**, **Actual Work**.

Assign Schedule States	Click to assign a schedule state to the group and open the **State Type** pane, from which you can select states from various state types (see controls below).
Unassign Schedule States	Click to remove or unassign a schedule state.

State Type Pane Controls

Apply	Click to apply the state to the schedule state group.
Close	Click to close the **State Type** pane.
Help	Click to view a Help topic about the **State Type** pane.
State Type *drop-down list*	Select a state type for the Schedule State Group, such as **Fixed State**, **Activity**, **Exception Type**, **Break**, **Meal**, or **Time-Off Type**.
Show Assigned States *check box*	Check this box to display the states that are already assigned. When checked, the name of the schedule state group, to which this state is assigned displays in the **Schedule State Group** column.
Search *field*	Enter the search criteria. For example, if you selected **Exception Type** in the **State Type** drop-down list, enter an exception type name, such as **Exc1** or **Exc2**.

Assigning a State to Multiple Groups

You can assign the same schedule state(s) to different Schedule State Groups under the same Business Unit. For example, you can assign the state ExceptionType1 to SSG1 (under Site1 & under BU1) and to SSG2 (under Site2 & under BU1) at the same time—but only because both Schedule State Groups are under the same Business Unit (BU1).

Previously (in streams earlier than 8.1), a Schedule State could be assigned to a Schedule State Group only once at any given time.

Preset Schedule State Groups

Schedule state groups from a previous release of Workforce Management are brought into the WFM Web as pre-configured groups. The default groups, which can be edited or deleted are: **Asynchronous Work**, **Days Off**, **Exception Types**, **Fixed-Staff Work**, **Immediate Work**, **No Activity**, **Shift Items/Meals**, and **Time Off**.

Important

The formerly-used *Vacation Schedule State Group* no longer exists. Instead, Vacation is now a default time-off type within the Time Off Schedule State Group. All previously configured Vacation Schedule State Groups are migrated into the automatically-created Vacation time-off type.

Creating Schedule State Groups

1. In the **Configuration > Schedule State Groups** pane, select a the site for which you want to create the schedule state group.
2. On the **Schedule State Groups** pane, select **New** .
   The new schedule state group displays with a default name and the **Schedule State Group Properties** pane opens.
3. In the **Name** field, enter a name for your schedule state group. It must be unique within the site.
4. From the **Type** drop-down list, select a type (**None** (default), **Planned Overhead**, **Unplanned Overhead**, or **Actual Work**).
5. Assign schedule states to the group by clicking **Assign Schedule States** .
   The **State Type** pane opens.

   ## Tip

   To remove any schedule state, select it and click **Unassign Schedule States** .

6. Select a **State Type** from the drop-down menu.
   A list of states that are associated with this state type are displayed in the lower half of the pane.
7. (Optional) to display any states already assigned to the schedule state group, click the **Show Assigned States** check box.
8. When you have finished adding schedule states, click **Apply** .
9. In the **Schedule State Group Properties** pane, from the drop-down list, select **Adherence Rules** to continue configuration of this schedule state group. See Configuring Adherence Rules.

Creating Groups Using Copy and Paste

To create a new schedule state group by copying and pasting an existing one:

1. In the **Schedule State Groups** pane, select a schedule state group.
2. Select **Copy** .
   The **Copy Schedule State Group *<schedule state group name>*** pane opens.
3. Enter a name for the new schedule state group. It must be unique within the site.

> **Tip**
>
> If the name is not unique, the **Review Validation Messages** pane opens, with a description of the error message. In this case, `A duplicate name specified.`

4. In the lower half of the pane, select the business unit and site, with which you want to associate this schedule state group.
5. Click **Save Now** .
   The new schedule state group appears in the objects list according to the sort order selected (ascending or descending).

Editing Schedule State Groups

You can edit any schedule state group, whether it is pre-set or user-created.

To edit a schedule state group:

1. Select it **Schedule State Group** pane and make the changes in the **Schedule State Group Properties** and **Adherence Rules** panes.
2. Change the schedule state group name, if necessary. It must be unique within the site.
3. Change the state type, by selecting one of the four state types from the drop-down list.
4. Use the **Assign Schedule States** or **Unassign Schedule States** to change state assignment for this group.
5. When you have finished adjusting which schedule states are included, click **Apply** .
6. Click **Save Now** .
7. At the top of the **Schedule State Group Properties** pane, click **Adherence Rules** to continue configuration of this schedule state group. See Configuring Adherence Rules.

> **Important**

If you make any change to a Schedule State Group (assign or unassign a state, or change the adherence rule), the Schedule State Group effective date automatically updates to the current date.

Deleting Schedule State Groups

To delete a selected schedule state group from the **Schedule State Groups** pane:

1. Select the schedule state group you want to delete.
2. Click **Delete**  .
3. When the **Confirmation** dialog appears, click **Yes**.
   The schedule state group is deleted and any schedule states included in it now appear on the **State Type** pane.

Configuring Adherence Rules

You can configure Adherence Rules for each Schedule State Group and for multiple media channels within a site. These rules determine what standards WFM uses when monitoring agent performance. To view the **Adherence Rules** pane, select **Adherence Rules** at the top of the **Schedule State Group Properties** pane.

Adherence Rules Pane Controls

Save Now	Click to save changes you have made in this pane.
Associate Genesys current states with schedule states group	Click to associate Genesys current states with schedule state groups.
Delete State	Click to delete an associated Genesys state.
Help	Click to view a Help topic about the **Adherence Rules** pane.

Adherence Threshold Levels

Channel	Click to configure the media channel for the schedule state group. Select one of three radio buttons: • **None**—Schedule state groups containing non-work activities that do not have a specified channel (and therefore, belong to all channels). • **Voice/Unspecified**—Schedule state groups using this channel contain voice-related activities and other work that is not related to any other configured channel, such as other non-media-channel activities. • **Specify Name**—Schedule state groups with this name will contain activities and other work being done on this channel. Important The channel name must match the name that is used in Stat Server statistics (and sent to WFM).
Channel Name	Enter a name for the selected channel.

Genesys Current States Mappings

Start Before Threshold *field*	Enter a start time. This is the duration of time considered to be adherent time before the start of a schedule state. Valid values are `0–20`. The default value is `20`.
End After Threshold *field*	Enter an end time. This is the duration of time considered to be adherent time after the end of a schedule state. Valid values are `0-20`. The default value is `20`.
Current State *drop-down list*	Select a state from this list to set the current state to be mapped to the aux (reason) code.
Aux Code (Reason) *field*	Enter an appropriate aux (reason) code. A reason is user-specified information that supplements schedule state information. A reason helps to define the precise nature of the schedule state group to which it is attached. Tip Reasons do not apply to all Genesys current states. Refer to your Genesys Stat Server documentation for additional information.

Start Before and End After Thresholds

Set the Start Before Threshold and End After Threshold for an acceptable amount of flexibility in scheduled state start and end times. Threshold settings indicate how many minutes early or late an agent can transfer to a scheduled state without being considered *nonadherent*.

Example 1: An agent is scheduled to start a shift at 12:00 PM and the Start Before threshold is set for 5 minutes. If the agent starts the shift at 11:54 AM, which is beyond the 5-minute threshold, it is written to the database and appears on the adherence reports as a nonadherent current state.

Example 2: If the schedule requires agents to work from 12:00–1:00 and both thresholds are set to 5 minutes, an agent who starts at 11:55 and ends at 1:04 is adherent. Agents who start and/or end outside the configured thresholds are either *nonadherent* or *severely nonadherent*.

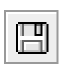
You can configure the setting that marks the cut-off between nonadherence and severe nonadherence in the **Alarm Threshold** combo box on the **Site Properties** pane of the **Organization** module. See Site Properties for details.

Setting Adherence Rules

Link to video

To set adherence rules for a schedule state group:

1. In the **Schedule State Groups** pane, select a schedule state group.
2. At the top of the **Schedule State Group Properties** pane, select **Adherence Rules**.
   The Adherence Rules pane opens.
3. In the **Start Before Threshold** and **End After Threshold** fields, set the adherence threshold levels for the schedule state group.
   These rules define agent adherence parameter. Agents are adherent if their start time and end time are within threshold intervals for that scheduled state.
4. Select the media channel for the Schedule State Group: **None**, **Voice/Unspecified**, or **Specify Name**.
   If you choose Specify Name, enter the channel name—for example, email.
   The channel name must match the name that is used in Stat Server statistics (and sent to WFM).
5. Click **Associate Genesys current states with schedule states group**  to populate the mappings list in the lower half of the pane.
   - Select the current states that should be associated with this schedule state group.
   - Continue adding rows as necessary.
   - To remove a Genesys current state from the **Current State** column, select it and then click **Delete State** .

   You can associate a Genesys current state with any number of schedule state groups.
6. Enter reasons (aux codes), if necessary, by typing the appropriate code into the **Reason Code** column for the appropriate Genesys current state.
7. Click **Save Now** .

Configuring Media Channels for Schedule State Groups

Configuring a media channel for schedule state groups enables you to track an agent adherence to the schedule when agents are scheduled to work on multiple media channels or when agents are working on a media channel that is currently not scheduled. Agents are considered non adherent, if they are non adherent on any one of those channels.

After implementation, WFM tracks multiple channel-related agent real-time states per time interval. See the following example of a contact center use case that might require multi-channel adherence tracking.

Use Case: Tracking Multi-Channel Adherence

A site in the contact center has voice and email related activities, and agents can make outbound calls, which are scheduled as exceptions. The schedule state groups can be configured as follows:

Schedule State Group	Channel	Schedule State	Real-time States
Inbound calls	Voice/Unspecified	All (immediate) voice-related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Outbound calls	Voice/Unspecified	Exception types that represent outbound call work	WaitForNextCall, CallRinging, AfterCallWork, CallOutbound
E-mails	<channel_name> (for example, email)	Deferred, email related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Overheads	None (no channel)	Breaks, meals, time off, exceptions, etc.	NotReadyForTheNextCall, LoggedOut

Important

Tracking multi-channel adherence is a new feature in WFM 8.5. if there is no schedule state group with a channel name under the site, WFM calculates adherence as it would for a single agent real-time state, and Stat Server aggregates the statistics as it did in previous WFM releases. However, if there is at least one schedule state group with a configured channel name, WFM tracks multiple channels. For each site, WFM tracks as many different channels as there are distinct channel names for all schedule state groups under the site.

For more information about how WFM calculates agent adherence for single channel and multi-channel sites, see Adherence Calculations.

Schedule State Groups History

Use the **History** pane to enable accurate reporting of historical adherence, by adding and modifying the Schedule State Group **Effective Date**.

Effective Dates in Schedule State Group History

The **History** pane displays historical data; in other words, how the Schedule State Group has changed over time. It enables you to restore previous changes to the current state.

By setting an effective date, you specify that the historical change (the latest one in list) is actually effective from that specific date (and not immediately). Historical changes made before that are valid up to the effective date.

The effective date can be set on any latest historical change and many historical changes can have effective dates. This enables you to specify dates, from which changes are effective. This is important, because Adherence Reports are populated with information from the Schedule State Groups to determine adherence. Changing a Schedule State Group configuration without setting adherence, applies the latest changes to all data and adherence might be incorrectly calculated for dates, on which the previous Schedule State Group configuration should have been applicable.

After changing a Schedule State Group, it is best to apply the effective date, by indicating from which date it is applicable to ensure the **History** pane displays past changes and the effective date assignments.

Modifying the Effective Date

If you modify the effective date in the **Schedule State Group History** pane, the new date is applicable, starting at midnight on the effective date (not from the midnight of the current day in the site time zone, as is the default), and historical adherence is updated in the Adherence Reports.

To change the effective date:

1. Click **Modify** to open the **Set Effective Date** pane.
   The current date in your site time zone is displayed, by default.
2. Click the date field to display a calendar, from which you can select an alternative date.
3. Click to **Apply**  the changes or **Close**  without modifying.

Loading Historical Data

To populate the **Historical Changes Records** section in this view, click **Load Historical Data**.

All historical change records, from the start date to the current day, will be displayed in the following columns:

- **Date and Time**—The date and time that the change was made.
- **Action**—Details of the changes.
- **Effective Starting**—The effective start date of the changes.

Activities

Activities are work items that are tracked and managed using Workforce Management. For example, answering inbound calls, responding to email, completing after-call work, performing scheduled callbacks, and participating in chat sessions.

You must configure activities separately for each site or business unit. Business units require multi-site activities, which combine activities at some or all of the sites in a business unit. If you select a site in the **Objects** pane, the activities configured for that location appear in the **Activities** pane. If you select a business unit, the multi-site activities configured for that location appear in the **Activities** pane.

> **Important**
> To configure objects and change settings in the **Activities** and **Multi-Site Activities** view, you must have the appropriate role privileges. See Configuration Role Privileges.

In the **Activities** pane, click an activity to view its properties and edit them.

- For instructions about how to view or create new activities or multi-site activities and configure staffing properties and open hours, see Creating and Deleting Activities.
- To define regular activities, see Configuring Skills for Activities and Associating Agents With Activities.
- To configure multi-site activities, see Assigning Activities to Multi-Site Activities, and Configuring Skills for Multi-Site Activities.
- To view, add, edit, or delete activity sets, or configure new or existing activity sets, see Creating Activity Sets and Adding Activities to Activity Sets.
- To view, add, edit, or delete activity groups, or configure new or existing activity groups, see Grouping Multiple Activities.
- To configure activity policies to establish rules and guidelines that determine how, when, and in which activities the agent can engage, see Activity Properties.
- To associate Stat Server statistics with activities and multi-site activities for use in monitoring interaction and service levels, see Statistics Configuration for Activities and Configuring Statistics for a Multi-Site Activity.
- To set default target service levels or staffing requirements for different types of activities, see Default forecasting objectives.

Activity Properties

When you select a site and add an activity, the **Activity Properties** pane opens and you can configure activity policies to establish rules and guidelines that determine how, when, and in which activities the agent can engage.

The Activity properties are described in the following section; Multi-Site Activity properties are described below.

In the **Activity Properties** section:

- **Name**—Enter a name for this activity. The name must be unique within the site.
- **Short Name**—Enter a short name for this activity. The short name can be up to three characters and identifies the activity in Schedule displays. The short name does not need to be unique.
- **Type**—Select one of the following three options:
  - **Immediate Work**—CTI activities that use Workforce Management service objectives for Forecasting and Adherence.
  - **Deferred Work**—Backlog activities, such as email, that use special forecasting calculations.
  - **Fixed-Staff Work**—Non-CTI activities that do not use Workforce Management service objectives.
- **Activity Set**—If this activity becomes part of an Activity Set, this field is automatically populated with the name of the activity set.
- **Maximum Simultaneous Users**—Enter a value that represents the maximum number of agents or staff that can work on this activity simultaneously.
- **Minimum Staffing Level**—Enter a value for the minimum percentage of agents or the minimum number of agents required for this activity and select the appropriate radio button: **Percent** or **Agents**.

In the **Hours of Operation** section:

- **Monday to Sunday** *fields*—Enter start and end times.
- **Next Day** *check box*—Check or uncheck for each day, as required. Check the check box for those days on which the hours of operation extend into the next day.
- **Closed** *check box*—Check or uncheck for each day, as required. Check the check box for those days when the contact center is closed. When checked, the start and end times for that day are disabled and cannot be modified. Lease the check box is unchecked, if the contact center is open on that day.
- **Copy/Paste** *icons*—Click to copy and paste start and end times, and next day settings from one day to another day.

Multi-Site Activity Properties

The **Properties** pane opens when you select a business unit and add a multi-site activity. The properties in the following sections have the same descriptions as the ones above.

In the Multi-Site Activity Properties section:

- **Name** (must be unique within the business unit).
- **Type**

In the Hours of Operation section:

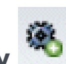
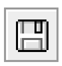
- **Monday to Sunday** *fields*
- **Next Day** *check box*
- **Closed** *check box*
- **Copy/Paste** *icons*

Creating and Deleting Activities

You can add an activity or a multi-site activity by creating a new one or by copying an existing one. You can also delete existing activities.

Creating Activities

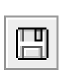
To create an activity:

1. In the **Objects** pane, select the site to which you want to add the new activity.
2. When the **Activities** pane opens, select **New Activity** .
The Activity Properties pane opens with the default name New Activity (<*number*>).
3. In the **Activity Properties** and **Hours of Operation** sections, populate the fields as described in Activity Properties.
4. Click **Save Now** .
5. Configure the activity, as explained in these topics:
    - Adding Activities to Activity Sets
    - Configuring Skills for Activities
    - Associating Agents with Activities.

    See also Statistics Configuration for Activities.

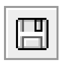
Creating Multi-Site Activities

To create a multi-site activity:

1. On the **Objects** pane, select the business unit, to which you want to add the new multi-site activity.
2. Select **New Multi-Site Activity** .
The Multi-Site Activities Properties pane opens.
3. In the **Multi-Site Activity Properties** and **Hours of Operation** sections, populate the fields as described in Multi-site Activity Properties.
4. Click **Save Now** .

Creating Activities and Multi-Site Activities Using Copy

To create a new activity or multi-site activity by copying an existing one:

1. In the **Activities** pane, select an activity or multi-site activity.
2. Select **Copy** .
   The Activity Assignment pane opens.
3. In the **Name** field, rename the activity, if necessary. (The name must be unique with the site or business unit [BU].)
4. In the **Associate Copied Activity With The Following Site (for multi-site, BU)** section, select the site (or BU) with which you want this activity to be associated.
5. Click **Save Now** .

Deleting Activities and Multi-Site Activities

To delete an activity or multi-site activity:

1. Select the activity in the **Activities** pane.
2. Click **Delete** .
3. When the **Confirmation** dialog opens, click **Yes** to delete or **No** to cancel the action.

Creating and Deleting Activity Sets

Use *Activity Sets* to combine activities into groups for multi-skilled scheduling. At the top of the **Activities** pane, click **Activity Sets** and configure activity sets for a selected site.

Tip

You must create activities before you can configure activity sets.

When using activity sets, be aware of the following:

- Activity sets are separately configured for each site. You cannot configure activity sets for business units.
- An activity in an activity set can be incorporated in a multi-skilled schedule only with other activities from the same set.
- An activity cannot belong to more than one activity set.
- An activity belonging to an activity set can only be scheduled using the activity set.
- To configure an activity so that it will never be incorporated in a multi-skilled schedule, create an activity set containing only that one activity.
- The activity set constraint is incompatible with the maximum seats constraint. If there is a conflict, Scheduler gives priority to the activity set constraint.

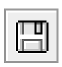
Agents assigned to an activity set perform the selected activities on a multi-skilled basis. These agents cannot be assigned to any other activities during the minimum time period specified for the activity set.

Important

To accommodate those times when some agents cannot be assigned to work on an activity set, Genesys recommends that you always keep an activity that is not a part of an activity set available for agents to perform during the activity set open hours. If the activity set becomes overstaffed before all agents are scheduled, Scheduler tries to create activity set work for them. However, if an agent's unassigned period is shorter than the minimum activity set period, Scheduler has to assign the agent an extended period with no activities at all (forced break) because no activity is available for him or her to work on.

Creating Activity Sets

To create an Activity Set:

1. In the **Objects** pane, select the site, for which you want to create the activity set.
2. At the bottom of the **Activities** pane, click **Activity Sets**.
3. In this pane, click **New Activity Set**  .
   The **Activity Set Properties** pane opens.
4. Configure the following settings, as described:
   - **Name**—Enter a name for the activity set. The name must be unique within the site.
   - **Short Name**—Enter a three-letter short name for the activity set.
   - **Minimum Duration**—Enter a value for the minimum length of time that an agent can work on the activities within this activity set.
   - **Strict**—Check this box if you do not want meals, part-day exceptions, or part-day time offs to be scheduled during the activity set period. (Breaks can be scheduled during the activity set.) Leave this box unchecked, if breaks, meals, part-day exceptions, and part-day time offs can interrupt this activity set. (The only constraint is the minimum duration.)
5. Click **Save Now**  .
6. Continue with the configuration of the activity set by adding activities to it. See Adding Activities to Activity Sets.

Deleting Activity Sets

To delete an activity set:

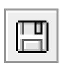
1. In the **Activity Sets** pane, select the set that you want to delete.
2. Click **Delete**  .

Grouping Multiple Activities

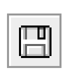
Grouping multiple activities from within the same business unit enables data aggregation for contact center performance monitoring and reporting.

You can create activity groups, assign activities to them using a filter, copy, and delete activity groups.

Creating New Activity Groups

1. In the **Objects** pane, select the business unit, for which you want to create the Activity Group.
2. In the **Activities** pane, select **New Activity Group**  .
   The Activity Group Properties pane opens.
3. In the **Name** field, enter a unique name for the group.
4. Click **Save Now**  .
   The new activity group appears in the Activities pane.

Assigning Activities to Activity Groups

1. In the **Activities** pane, select the group, to which you want to assign activities.
2. At the top of the **Activity Group Properties** pane, click **Activities**.
3. When the **Associated Activities** pane opens, click **Assign regular activities** .
   The Activities pane opens.
4. Select the activities you want to associate with this **Activity Group**.
   To quickly find an activity, type the activity name into the Search field. Only activities for the selected business unit are available. Activities for other business units do not appear.
5. When you have selected all activities, click **Apply**  .
6. In the **Associated Activities** pane, click **Save Now** .

When you assign activities to an activity group, you can use a filter to select only those sites and multi-site activities to which you want these groups and activities to apply.

Using Filters When Assigning Activities to Groups

1. In the **Activities** pane, click **Filter** .
   The Filter pane opens.
2. In the Sites list, do one of the following:
   - Remove the check mark in the **All** check box and select the sites, to which you want to assign these groups and activities.
   - Remove the check mark in the **All** check box and check **No Filtering by Sites**. (If this box is checked, the activities and groups apply to all sites in the list.)
3. In the **Multi-Site Activities** section, do one of the following:
   - Remove the check mark in the **All** check box and select the multi-site activities, to which you want to assign these groups and activities.
   - Remove the check mark in the **All** check box and check **No Filtering by Activities**. (If this box is checked, the activities and groups apply to all multi-site activities in the list.)
4. Click **Apply** .

Copying Activity Groups

1. In the **Activities** pane, select the Activity Group you want to copy.
2. Click **Copy** .
   The Copy Activity Group pane opens.
3. In the **Name** field, rename the Activity Group, if necessary. (The name must be unique within the business unit.)
4. In the **Associate Copied Activity Group With The Following Business Unit** section, select the business unit with which you want this Activity Group to be associated.
5. Click **Save Now** .

> **Tip**
> When you copy an activity group and add it to the same business unit, all activities that were associated with the copied activity group are associated with the duplicated activity group.

Deleting Activity Groups

1. In the **Activities** pane, select the **Activity Group** you want to delete.
2. Click **Delete**  .
3. When the Confirmation dialog opens, click **Yes** to delete or **No** to cancel the action.

Adding Activities to Activity Sets

After creating an activity set, add the activities, by opening the **Activities** pane.

To add activities to an activity set:

1. In the **Activities** pane, click **Assign regular activities** .
   The **Available Activities** pane opens.
2. From the **Activities** list, select the activities that you want to add to this set.
   To quickly find an activity in the list, enter the name of the activity in the **Search** field.

   > **Tip**
   > You will notice that the activities that are already assigned to an activity set, display the activity set name in a separate column. These same activities are still available to select for the new activities set.

3. Click **Apply** .
4. In the **Associated Activities** pane, click **Save Now** .
   The selected activities are added to the list of activities in the **Activity Sets** pane.

Configuring Skills for Activities

Use the **Skills** pane to add, or delete skills that are associated with an activity.

Note the following information about skills:

- If you add a skill to an activity, only agents with that skill are scheduled for that activity.
- If you associate multiple skills with an activity, agents must have all of the skills to work on the activity.
- An activity may include more than one skill, or it may represent a particular skill level.

> **Important**
> Agents are associated with skills in Genesys Administrator, not in the Workforce Management. Workforce Manager Skills are identical to Genesys Administrator **Skills** objects and become available in Workforce Management after synchronization with Genesys Administrator.

Skills Security Features

Only the skills that the current user is authorized to access in Genesys Administrator are visible.

If a user's security access has changed so that he or she can no longer access certain skills, those skills are still visible; but the user whose access was changed cannot add, delete, or modify them.

Adding Skills to an Activity

To add a skill to an activity:

1. In the **Activities** pane, select the activity, to which you want to add skills.
2. At the top of the **Activities Properties** pane, click **Skills**.
3. When the **Skills** pane opens, click **Add Skills to an Activity**  .
4. In the **Skills** pane, assign the minimum and maximum skill levels.
    - **Skill Minimum Level**—A minimum skill level value required for an agent with this skill to perform this activity. Define whatever range is appropriate for each skill, such as 1 to 10 or 1 to 100. The range should be consistent with the range used in Genesys Administrator.
    - **Skill Maximum Level**—A maximum skill-level value required for an agent with this skill to perform

this activity.

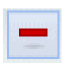
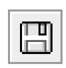
5. In the list of skills, select those that you want to associate with this activity.
To quickly find a skill, you can enter search criteria into the **Search** field (for example, the skill name).

> **Important**
> You must define skills in Genesys Administrator before they appear in this list.

6. When you have finished selecting skills, click **Apply**  .

Deleting Skills Associated With an Activity

To delete a skill:

1. In the **Skills** pane, select the skill you want to delete.
To quickly find a skill, you can enter search criteria into the **Search** field (for example, the skill name).
2. Click **Delete**  .
3. When you have finished deleting skills, click **Save Now**  .

Associating Agents With Activities

Use the **Agents** pane within the **Activities** view to associate agents with activities. To open this pane, select **Agents** at the top of the **Activity Properties** pane.

Agents can work on activities under two conditions:

1. They have the proper skill set. Their skills must match the skills required for the activity.
2. They are eligible for activity assignments. If the effective date is before the current date, these assignments override the agent's eligibility to work on the activity accordingly to the skill set.

To adjust which agents are associated with an activity, change the skill settings for either:

- The agent, by using the **Agent Information** section. See the Agent Activities View.
- The activity, by using the **Skills** pane in **Configuration > Activities** module. See Configuring Skills for Activities.

Associating Agents with an Activity

To associate an agent with an activity:

1. In the **Activities** pane, select the activity, with which you want to associate agents.
2. At the top of the **Activity Properties** pane, click **Agents**.
3. The **Agents Associated with The Activity** pane opens.
4. Click **Associate agents with the activity** .
   A list of Available Agents opens.
5. In the **Effective Date** field, enter (or click within the field to select from a calendar) the date that you want the association to begin.
6. In the **Status** field, use the drop-down list to select one of four options: **Primary**, **Secondary**, **Auto**, or **Disabled**.
7. In the Available Agents list, select the agents you want to associate with this activity.
8. When you have selected all agents, click **Apply**  .

Tip

To disassociate (or remove) an agent from an activity, go to **Configuration > Agents > Activities** view.

Finding Agents in the List

There are three ways to quickly and easily find agents when there is a long list of available agents:

1. Enter the agents name into the **Search** field and select one of the two **Search by:** filters (**First Name** or **Last Name** radio button).
2. **Sort** agents by **First Name**, **Last Name**, or **Team**.
3. **Filter** agents by Activities, Multi-Site Activities, or Contracts.

In each of the three **Filter** panes, you can **Sort** the list in ascending or descending order.

To remove an item from the list, click **Remove** .

Statistics

Use the **Statistics** pane to associate statistics with each activity or multi-site activities.

Important

You must have the proper permission or security right to view and configure statistics for Activities and Multi-Site Activities. If you do not have this right, the **Activities > Statistics** and **Multi-Site > Activities** panes are not visible. Also, you cannot associate statistics with an activity or multi-site activity if it is of type **Fixed-Staff Work**.

Use the statistics to monitor interaction and service levels.

To associate statistics with activities, you must have configured the necessary statistics in Stat Server and configured a connection between Data Aggregator and Stat Server on the **Data Aggregator Application Connections** tab. The Data Aggregator–Stat Server connection must be active.

Tip

You will find that some statistics are already configured in WFM with the variant names (and 'WFM' prefixed) listed in parentheses in the Statistics Options column of the Recommended Statistics Settings table.

Statistics properties are described in Statistics Properties. Additional configuration information appears in Configuring Activities Statistics and Multi-Site Activities Statistics.

Statistics Properties

Statistics—The Stat Server statistics that you will associate with an activity or multi-site activity.

Type—The kind of object being monitored.

- **Interaction Volume**—Defines how to retrieve the number of interactions coming into the contact center for each activity. Used for Immediate and Deferred activities.
- **Abandonment Volume**—Describes the number of interactions abandoned from the contact center for each activity. Used for Immediate activities.
- **Quality of Service**—Used 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 time of answer (ASA). Used for Immediate activities.
- **Handle Time**—Tracked for each activity and compared to the handle-time objectives defined in the forecast. Used for Immediate and Deferred activities.
- **Backlog**—Tracks the number of incoming interactions in the queue that are waiting for processing and have not yet been distributed to the agents. Used for Deferred activities only.

Object—The Queue, Interaction Queue, Routing Point, Group of Queues, Group of Routing Points, Group of Agents, or Group of Places being monitored.

- **Queue**—All DNs of the ACD Queue and Virtual Queue types in the site.
- **Interaction Queue**—Script objects of the Interaction Queue type.
- **Routing Point**—All DNs of the Routing Queue and Virtual Routing Point types in the site.
- **Group of Queues**—All DN Groups of the ACD Queue type in the site.
- **Group of Routing Points**—All DN Groups of the Routing Points type in the site.
- **Group of Agents**—All DN Groups of the Agent type in the site.
- **Group of Places**—All DN Groups of the Place type in the site.

Filters—Optional values that define the interactions handled by the object more precisely. Used in contact centers with multi skilled agents. In most cases, filters require installation of Genesys Universal Routing Server (URS).

Flexible Configuration Mode

The **Statistics** section of **Statistics Properties** includes a **Flexible configuration mode** setting for certain Types (such as, Quality of Service, Handle Time, Interaction Volume, and Backlog). When enabled, it supports configuration settings from a previous release of WFM or to specify more complex statistical requests

In Flexible configuration mode, if you select Interaction Volume, Handle Time, or Backlog all Object types are available rather than only those shown in Recommended Statistics Settings. That is, you can select objects of the types Queue, Interaction Queue, Routing Point, Group of Queues, Group of Routing Points, Group of Agents, or Group of Places.

If you select Quality of Service while in Flexible configuration mode, you can select statistics for average speed of answer alone.

If you are not in Flexible configuration mode, you must select one of these combinations:

- Service Factor, Distributed Interactions, and Time Range
- Distributed Interactions and Average Speed of Answer
- Service Factor, Distributed Interactions, Average Speed of Answer, and Time Range.

Statistics configured using **Flexible configuration mode** setting appear in the **Statistics** list with an exclamation mark icon next to them.

> **Important**
> If you select the **Flexible configuration mode** check box but do not configure any of the additional settings which then become available, the statistic is treated as if the **Flexible configuration mode** check box was cleared. No exclamation point icon appears next to the statistic in the **Statistics** list; and when you edit the statistic, the **Flexible configuration mode** check box is not selected.

Use As Average

Also in the **Statistics** section of **Statistics** properties, the **Use as average** setting tells WFM to record average values. Use it only for the Quality of Service and Handle Time statistics types.

For example, regular Handle Time statistics provide the total handle time, a number which is then divided by the number of interactions handled to produce the value that WFM uses. If you select **Use as average**, WFM simply records the total handle time and does not divide that value by the number of interactions.

> **Important**
> You can apply **Use as average** only once per activity for each statistic type.

Configuring Statistics for Activities

Use the **Activities Statistics** pane to associate Stat Server statistics with selected activities. When you define a statistic, you tell WFM which statistics and which objects to monitor for each activity. You define multi-site activity statistics in the same way you define regular activity statistics.

Some activities may require multiple statistics definitions, for example, you may have to define statistics for each queue or group that performs this activity.

Add and delete statistics for activities using the procedures in this topic.

Adding Statistics to Activities

To add statistics to an activity:

1. Select the Site that contains the activities you want to associate with statistics.
2. In the **Activities Properties** pane, select **Statistics**.
3. In the **Activity Statistics** pane, click **Add Statistics Information to activity** .
4. In the **Statistic Type** pane, configure the statistics. See Recommended Statistics Settings.
5. Select a **Filter**, if necessary.
   Filters are used in multi skilled contact centers to further clarify the object to be monitored.
6. Select the **Time Range(s) for Quality of Service** statistics.
   You can select one or two time ranges.
7. Check the Flexible configuration mode check box, if applicable.
   This option is not available for Abandonment Volume statistics.
8. Check the Use as average check box, if applicable.
9. Click **Apply** .
10. After the statistic appears in the **Activity Statistics** pane, click **Save Now** .
    The selected statistic is now associated with the activity.
11. To add additional statistics to this same activity, click **Add Statistics Information to activity** and continue with steps 3-7 in this procedure.

> **Tip**
> The **Statistics** section displays different statistic, depending on the **Type/Object**

combination you choose. Statistic types are predefined and not all statistics types apply to all activity types.

Fixed staff activities do not use statistics. Therefore, if you select an activity of type **Fixed-Staff Work**, the **Statistics** pane is not displayed.

After the **Type** and **Object** are selected, the drop-down lists are enabled and you can choose statistics from the list. For a description of all of the **Types**, **Objects**, **Statistics**, and **Filter**, see Statistics Properties.

Recommended Statistics Settings

The **Statistics Option** names in this table are suggested. Use Genesys Administrator to open the Stat Server application, where you can set the names for these options and the values for their objects.

Statistics Types	Statistics Options	Available Objects
Interaction Volume	TotalNumberCallsEntered (or WFMTotalNumberCallsEntered)	Queue, Interaction Queue, Routing Point, Group of Queues, and Group of Routing Points
Abandonment Volume	TotalNumberCallsAband (or WFMTotalNumberCallsAband), TotalNumberShortAbandons, TimeRange	Queue, Interaction Queue, Routing Point, Group of Queues, and Group of Routing Points
Quality of Service	ServiceFactor1 (or WFMServiceFactor1), AverTimeBeforeAnswering (or WFMAverTimeBeforeAnswering), TotalNumberCallsDistrib (or WFMTotalNumberCallsDistrib)	Queue, Interaction Queue, Routing Point, Group of Queues, and Group of Routing Points
Handle Time	TotalNumberCallsHandled (or WFMTotalNumberCallsHandled), TotalHandleTime (or WFMTotalHandleTime)	Group of Agents, Group of Places
Backlog	EmailsWaitingInQueue (or WFMEmailsWaitingInQueue)	Queue, Interaction Queue, Routing Point, Group of Queues, and Group of Routing Points

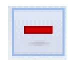
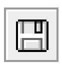
Tip

Statistics for the multimedia interaction queue depend on the interaction type (for

> example, the email, chat, backlog and open media types will have different statistics). For a complete list of statistics and statistic categories, see the *Workforce Management Administrator's Guide*.

Deleting Statistics from Activities

To edit statistics associated with an activity:

1. In the **Activities Statistics** pane, select statistic you want to delete.
2. Click **Remove Statistics Information from activity**  .
3. When the **Confirmation** dialog appears, select **Yes** to proceed or **No** to cancel the action.
4. Click **Save Now**  .

Configuring Skills for Multi-Site Activities

Use the **Skills** pane to add, or delete skills that are associated with a multi-site activity.

Adding Skills to a Multi-Site Activity

To add a skill to a multi-site activity:

1. In the **Objects** pane, select a business unit.
2. In the **Activities** pane, select the multi-site activity, to which you want to add skills.
3. At the top of the **Multi-Site Activities Properties** pane, click **Skills**.
4. When the **Skills** pane opens, click **Add Skills to an Activity** .
5. In the **Skills** pane, assign the minimum and maximum skill levels.
   - **Skill Minimum Level**—A minimum skill level value required for an agent with this skill to perform this activity. Define whatever range is appropriate for each skill, such as 1 to 10 or 1 to 100. The range should be consistent with the range used in Configuration Manager.
   - **Skill Maximum Level**—A maximum skill-level value required for an agent with this skill to perform this activity.
6. In the list of skills, select those that you want to associate with the multi-site activity.
   To quickly find a skill, you can enter search criteria into the Search field (for example, the skill name). You must define skills in Configuration Manager before they appear in this list.
7. When you have finished selecting skills, click **Apply** .

Deleting a Skill Associated With a Multi-Site Activity

To delete a skill:

1. In the Skills pane, select the skill you want to delete.
   To quickly find a skill, you can enter search criteria into the Search field (for example, the skill name).
2. Click **Delete** .
3. When you have finished deleting skills, click **Save Now** .

Multi-Site Activities Agents Pane

This pane is read-only and displays the agents who are associated with the multi-site activity.

You cannot associate agents with multi-site activities directly. Agents are associated with multi-site activities if their skills match the skills that are required by the child activities of the multi-site activity or are assigned to work on the child activity directly in WFM Web for Supervisor. Therefore, to adjust which agents are associated with a multi-site activity, change that agent's skill settings or assign the activity to an agent with an effective date. For more information, see the Agent Activities view.

Assigning Activities To Multi-Site Activities

Multi-site activities are regular activities that are being combined, for tracking purposes, into a single multi-site activity that is associated with a business unit. For example, you might want to track an activity, such as answering inbound calls, for all or some of the sites in one business unit, and track another activity, such as answering email, for all or some sites in another business unit. Grouping the same activity from multiple sites in the same business unit (creating a multi-site activity) allows you to do that.

Use the **Activities** pane within the **Multi-Site Activities** view to associate activities with multi-site activities.

> **Tip**
> To have the correct list of agents that can trade on primary and secondary activities, Genesys recommends to add only one activity under a site to the multi-site activity while configuring.

To assign an activity to a multi-site activity:

1. In the **Objects** pane, select a business unit.
2. In the **Activities** pane, select the multi-site activity with which you want to associate activities.
3. At the top of the **Multi-Site Activity Properties** pane, click **Activities**.
   The Associated Activities pane opens.
4. Click **Assign regular activities** .
   The Activities pane opens.
5. Select the activities you want to associate with this multi-site activity.

   To quickly find an activity, use the Search, Filter, or Sort agents in ascending or descending order.
6. When you have selected all activities, click **Apply** .
7. In the **Associated Activities** pane, click **Save Now** .

> **Tip**
> An activity can belong to only one multi-site activity. Only activities for the selected business unit are available. Activities for other business units do not appear.

Configure Skills and Statistics

After assigning activities, you can configure Skills and Statistics:

Click **Skills** at the top of the **Multi-Site Activities Properties** pane to configure the skills that you want to be tracked for the multi-site activity. See Configuring Skills for Multi-Site Activities.

Configure the statistics you want to be tracked for the multi-site activity. For more information, see Configuring Statistics for a Multi-Site Activity.

Using Filters To Assign Activities To Multi-Site Activities

1. In the **Activities** pane, click **Filter**  .
   The Filter pane opens.
2. In the **Sites** list, do one of the following:
   - Remove the check mark in the **All** check box and select the sites, to which you want to assign these groups and activities.
   - Retain the check mark in the **All** check box. (If this box is checked, the activities and groups apply to all sites in the list.)
3. In the **Multi-Site Activities** section, do one of the following:
   - Remove the check mark in the **All** check box and select the multi-site activities, to which you want to assign these groups and activities.
   - Retain the check mark in the **All** check box. (If this box is checked, the activities and groups apply to all multi-site activities in the list.)
4. Click **Apply**  .

Associating Sites with a Multi-Site Activity

If you select a multi-site activity and click **Activities** in the **Multi-Site Activity Properties** pane, you can select **Assign a Missing Site to Multi-Site Activity** to assign the activity to a missing site (unless activities from all visible sites were already assigned to a multi-site activity) The **Assign a Missing Site to Multi-Site Activity** pane opens and all sites within the selected business unit are listed.

To create a new, similar activity for each selected site:

1. Select a site.
   You can select more than one site by using the CTRL or SHIFT key.
2. Optionally, you can check the **Distribute Multi-Site Open Hours and Skills** check box to assign open hours. See the Tip below.
3. Click **Apply** .
   Under each selected site, WFM generates a new activity that can be renamed and associates that activity with the selected *source* multi-site activity. Open hours for the activity are 24/7 by default.

> ## Tip
> If you checked **Distribute Multi-Site Open Hours and Skills**, then open hours and skills for the generated activity (or activities) will be the same as they are for the selected *source* multi-site activity.
>
> Each site's time zone is used to define the open hours—and it might be a different time zone from the one used by the business unit under which the *source* multi-site activity is located.
>
> An activity generated in this way will always have the same activity type as the multi-site activity that was its source.

Statistics For Mulit-Site Activities

Use the **Multi-Site Activities Statistics** pane to associate statistics with selected activities. When you define a statistic, you tell WFM which statistics and which objects to monitor for each activity. You define multi-site activity statistics in the same way you define regular activity statistics.

For basic information about activities, activity types, and how to configure activities, see Configuring Statistics for Activities.

Associating Statisitics with Multi-site Activities

To associate statistics with multi-site activities:

1. In the **Objects** pane, select the business unit that contains the multi-site activities you want to associate with statistics.
2. In the **Activities Properties** pane, select **Statistics**.
3. In the **Activity Statistics** pane, click **Add Statistics Information to activity**  .
4. In the **Statistic Type** pane, configure the statistics as in steps 3-11 in the procedure Adding Statistics to Activities. See also Recommended Statistics Settings.
   The Statistics section displays different statistic, depending on the Type/Object combination you choose. Statistic types are predefined and not all statistics types apply to all activity types.
   Fixed staff activities do not use statistics. Therefore, if you select an activity of type Fixed-Staff Work, the Statistics pane is not displayed.
5. After the **Type** and **Object** are selected and the drop-down lists are enabled, choose statistics from the list.
   For a description of all of the Types, Objects, Statistics, and Filter, see Statistics Properties.

For more information about statistics for a multi-site activity, see Statistics Properties.

Deleting Statistics from Multi-Site Activities

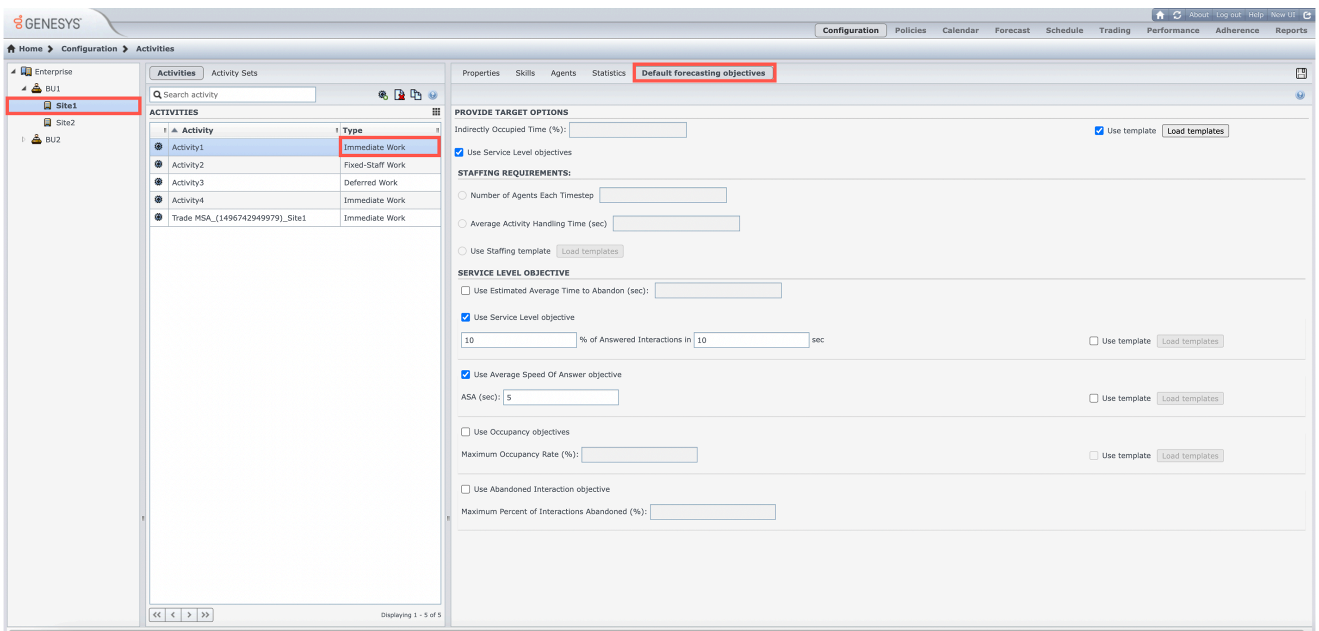
To delete a statistic from a multi-site activity, follow the steps in the procedure Deleting Statistics from Activities.

Configuring Default Forecasting Objectives

Use the **Default forecasting objectives** tab within the **Activities** view to set default target service levels or staffing requirements for different types of activities. You can configure default forecasting objectives for the following activity types (for activities under sites and multi-site activities):

- Immediate work
- Deferred work
- Fixed-Staff work

Configuring default forecasting objectives for Immediate Work activities



When an **Immediate Work** type activity is selected, you can configure the following settings and options as the default forecasting objectives:

- Target Options
- Staffing Requirements
- Service Level Objectives (enabled if this option is selected in **Provide Target Options**)

Provide Target Options

- Enter a percentage value for the **Indirectly Occupied Time (IOT)** setting. Alternatively, you can select **Use Template** to define IOT with a template. For more information about IOT, see What is Indirectly Occupied Time?
- Select **Use Service Level Objectives** to use the settings specified in the Service Level Objectives section. When selected, the options in this section become active and can be configured. All other configuration sections are greyed out.

Staffing Requirements

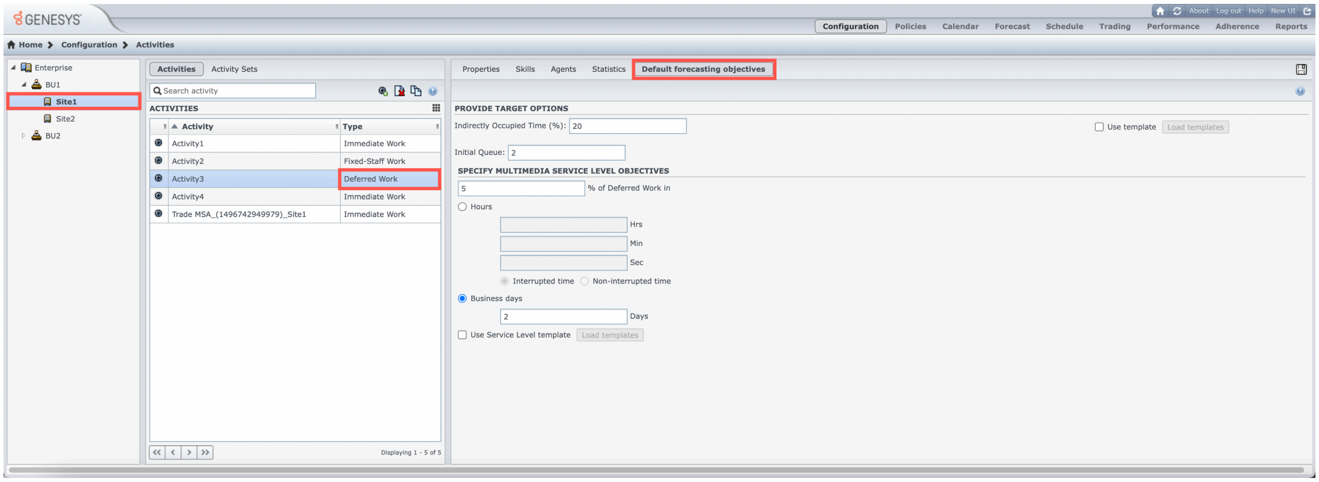
- **Number of Agents Each Timestep** — Select and enter a value for the number of agents.
- **Average Activity Handling Time (sec)** — Select and enter a value (seconds).
- **Use Staffing Template** — Select and click **Load Templates** to edit a template.

Service Level Objectives

The settings in this section are enabled when the **Use Service Level Objectives** option is selected in the Provide Target Options section.

- **Use estimated average time to abandon (sec)** — This is not a service objective. It's a parameter that helps define the queuing system used when WFM builds staffing requirements. This value represents the average time it takes for impatient callers to abandon the call.
    - **Use service level objective** — this setting specifies the percentage of calls to be answered in a specific number of seconds. For example, 80% of calls must be answered in 20 seconds. Select to enable it, and then enter the desired values. Alternatively, you can select **Use Template** to enable the **Load Template** button and select a template to edit.
- **Use Average Speed of Answer Objective** — Specifies the average amount of time it takes for an agent to answer a call. Select and specify a value for **ASA (sec)**. Alternatively, you can select **Use Template** to enable the **Load Template** button and select a template to edit.
- **Use occupancy objectives** — The total amount of time the agent is actually working on an activity as a percentage of the total amount of time the agent is available to work on an activity. Select to enable it and then enter a value for **Maximum Occupancy Rate (%)**. Alternatively, you can select **Use Template** to enable the **Load Template** button and select a template to edit.
- **Use abandoned interaction objective** — Select to enable it and then enter a value for **Maximum percent of interactions abandoned (%)**.

Configuring default forecasting objectives for Deferred Work activities



When a **Deferred Work** type activity is selected, you can configure the following settings and options as the default forecasting objectives:

- Target Options
- Multimedia Service Level Objectives

Provide Target Options

- Use the **Indirectly Occupied Time (IOT)** setting to define the queuing model that WFM uses when building a staffing forecast. Alternatively, you can select **Use Template** to define IOT with a template. For more information about IOT, see What is Indirectly Occupied Time?
- In the **Initial queue** field, enter an integer value that is `0` or greater. (If you leave this value empty, WFM assumes that the value is `0`.)

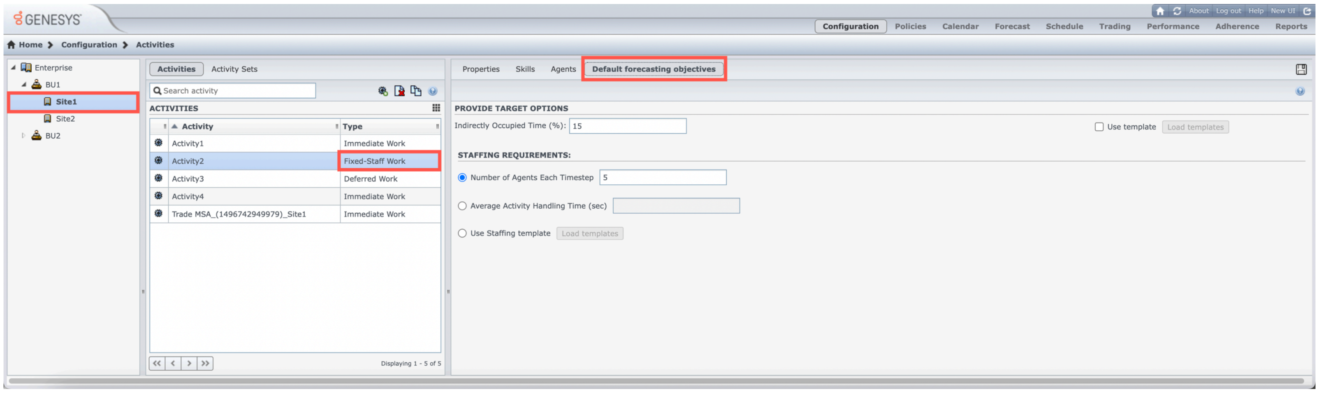
Specify Multimedia Service Level Objectives

Enter a value (%) for **Deferred work** and enter time based on:

- **Hours**, **Minutes**, or **Seconds** and select either **Non-interrupted time** or **Interrupted time** or
- **Business days**, and enter an integer greater than `0` for the **Days** value.

Alternatively, you can select **Use Service Level Template** to enable the **Load Template** button and select a template to edit.

Configuring default forecasting objectives for Fixed-Staff Work



When a **Fixed-Staff Work** type activity is selected, you can configure the following settings and options as the default forecasting objectives:

- Target Options
- Staffing Requirements

Provide Target Options

- Use the **Indirectly Occupied Time (IOT)** setting to define the queuing model that WFM uses when building a staffing forecast. Alternatively, you can select **Use Template** to define IOT with a template. For more information about IOT, see What is Indirectly Occupied Time?

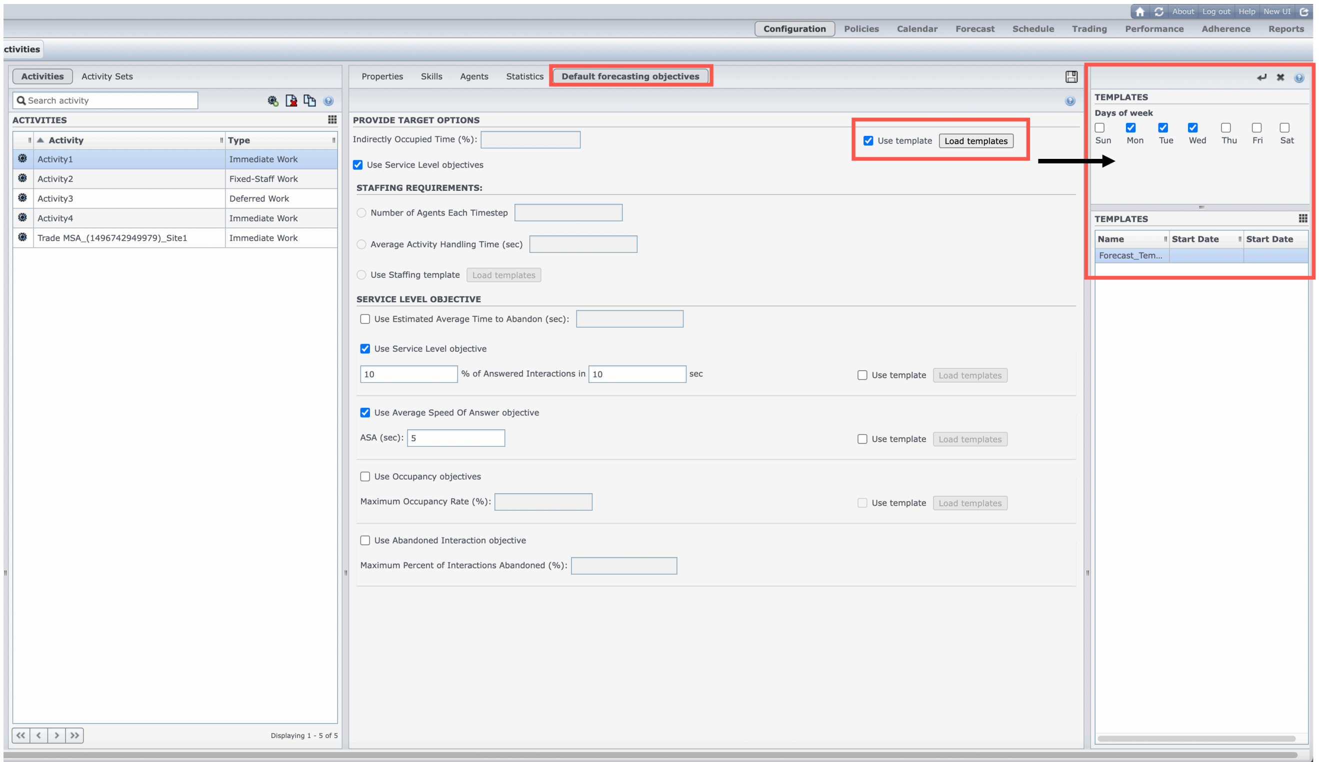
Staffing Requirements

- **Number of Agents Each Timestep** — Select and enter a value for the number of agents.
- **Average Activity Handling Time (sec)** — Select and enter a value (seconds).
- **Use Staffing Template** — Select and click **Load Templates** to edit a template.

What is Indirectly Occupied Time (IOT)

Indirectly Occupied Time (IOT) **helps to define the queuing model that WFM uses when building a staffing forecast. WFM considers a certain pool of agents in its queuing model when determining how calls will be distributed from the queue to agents. IOT affects the availability of agents to handle calls. For example, if you enter a value for IOT, such as 10%, an agent will not be in the agent pool 10% of the time (because the agent is off the phone).**

Using templates for default forecasting objectives

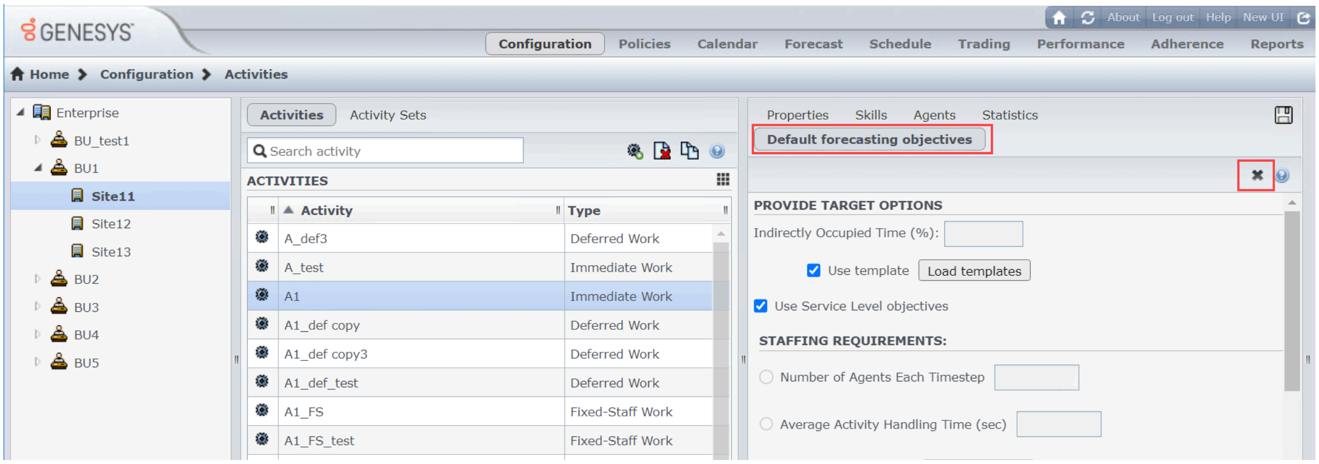


When configuring the default forecasting objective settings for an activity type, you can choose to use a template to define certain properties rather than enter the settings manually. To use a template, it must already be defined for that property.

When you select **Use Template** and click **Load Templates**, a **Templates** pane opens where you can see a list of available templates for that objective property. Select at least one template and one weekday, and then click **Save**.

If you don't already have forecasting templates defined for each type of objective, see Forecast Templates to learn how to create a new template and then follow the steps described in the Activities tab to set the desired properties.

Deleting Default forecasting objective values



To delete the Default forecasting objective values already set for an activity, click  on the **Default forecasting objectives** tab.

Users

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

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

In the **Users** module, you can:

- View a list of existing WFM users.
- View user properties.
- Configure a specific time zone, WFM Builder instance, and security role for a user.
- View and edit security role privileges.
- Grant or remove a user's access rights to business units, sites, and teams.
- Grant or remove a user's access rights to notifications.

Tip

If the user's role privileges are changed in this module and they no longer match the privileges set in the Roles module, the following dialog appears:

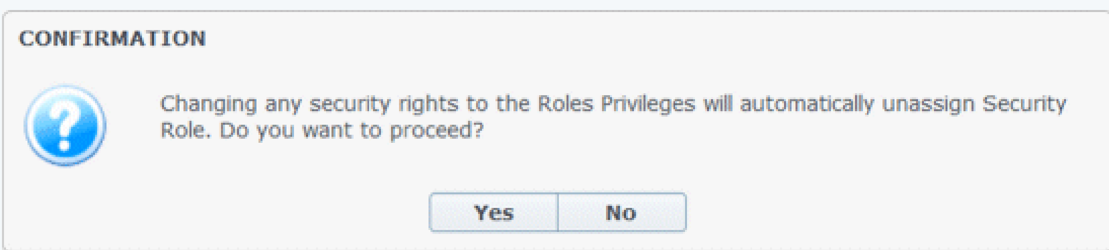


Figure: Confirmation Dialog

Click **Yes** to unassign the current security role or click **No** to cancel the action and retain the user's current security role.

Users Pane

This pane contains a list of users that have been imported into Workforce Management. It has the following columns: **Username**, **First Name**, **Last Name**, and **E-mail**. You can add users to this list (see Importing Genesys Users), or delete them.

In this pane, you can:

- Import Genesys users into WFM by clicking **Import Genesys User**  .
- Delete users by selecting them in the list and clicking **Delete**  .
- Search users by entering their usernames in the **Search** field.
- Sort the list by clicking the **Username**, **First Name**, or **Last Name** column headers.

Importing Genesys Users

When you import Genesys users, a pane opens that includes a drop-down list of the existing security roles. By default, the user you select is assigned the first role in this list. If no security roles exist, the list displays <none>. All imported users are assigned to the role selected from the list.

After import is finished, the **Users** pane displays the new users in its list. You can then select a user and change or configure their settings in the **Properties**, **Role Privileges**, or **Access Rights** pane.

User Properties

The **Users Properties** pane contains information about the selected WFM user.

User information

The **User Information** pane contains the following read-only fields, previously entered in Genesys Administrator:

- First Name of the user as entered in Genesys Administrator.
- Last Name of the user as entered in Genesys Administrator.
- Email. This is the user's email address entered in Genesys Administrator. WFM uses this email address for notification of:
  - Changes in the status of schedule trade requests.
  - Changes in the status of time-off requests.

For more about email notifications, see the *Workforce Management Administrator's Guide*.

Configuring Optional Settings

To configure the optional settings in the **User Information** pane:

1. Select a **Time Zone** for the user or leave blank. Time zone can be used in some **Performance** views and reports as an alternative to the site or business unit time zone. If you configured a default time zone before importing the user, that time zone appears as the Time Zone. If you did not configure a default time zone, **<none>** appears here.

   > **Important**
   > If you subsequently changed the default time zone, the time zone set as default when the user was imported appears here.

   To set a different time zone for this user:

   - Select the time zone from the drop-down list box. All time zones that have been imported into Workforce Management from the Configuration Database are included.

   If you need additional time zones, use the **Organization > Time Zones** view to change the time zones that appear in the list. See Time Zones List for details.
2. Select a **WFM Builder** server for the user or leave blank. This is the server that builds schedules. To use a specific WFM Builder to create WFM schedules for a dedicated group of users:
   - Select the **WFM Builder** server from the drop-down list.

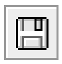
You do not need to specify a WFM Builder server if you want all users to share the same one. The default value is **None**.

3. Select **Security Role** for the user or leave blank. If you select a Security Role, the user adopts the role privileges that you configured for that security role. If the user is not assigned to a security role:
    - Clear the check boxes next to the names of the role privileges the user should not have permission to access. By default, all options are selected.
4. Click **Save Now** .

User Role Privileges

The **Users > Role Privileges** pane contains a list of security role privileges that are assigned to the selected user. Role privileges are described in detail in Roles Privileges.

To change a user's role privileges:

1. Select a user and then, click the check box beside the privileges you want to change.
2. Click **Save Now**  .

Click **Help** to view a Help topic about this pane.

Granting Access Rights to Get Notifications

The **Role Privileges** pane in the **Users** module is identical to the **Role Privileges** pane in the **Roles** module, with one exception; In the **Users** module, you can grant access to **Notifications**.

To grant access to notifications:

1. In the **Role Privileges** list, click the arrow to expand **Notifications**, as shown in the figure below.

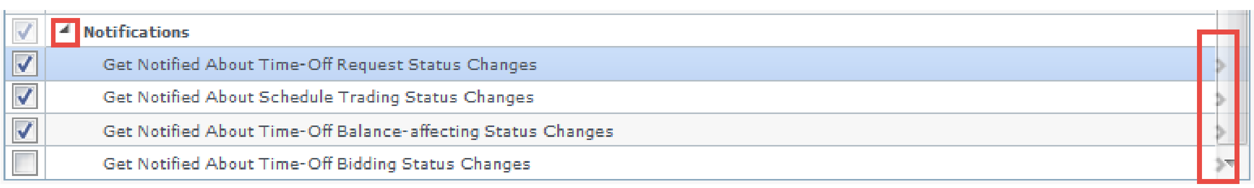
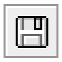


Figure: Role Privileges—Notifications

2. Click the arrow in the appropriate row to grant the selected user access to receive notifications about one of the following status changes:
   - Time-off request status changes
   - Schedule trading status changes
   - Time-off balance-affecting status changes
   - Time-off bidding status changes
3. A new pane opens, enabling you to grant access rights to the specific notification privilege you selected. For example, if you clicked the arrow in the first row, the **Grant Access** rights for **Get Notified About Time Off Request Status Changes** pane opens.
4. In the new pane, do one of the following for the selected privilege:
   -  Add access rights

-  Remove access rights
-  Close this pane and cancel any changes you made
-  Open a Help topic related to this pane

5. When you have completed all tasks, in the **Role Privileges** pane, click **Save Now** .

Access Rights

The **Access Rights** pane displays the business units, sites, and teams, to which the user has been given access. Use the controls in the top-right corner of these panes to complete the all of the tasks described in this topic.

Access Rights pane controls

Remove security rights to selected BU leaving sites unchanged	Click to remove the user's access rights to selected business unit, but retain the user's access rights to the sites within this BU.
Add Access Rights	Click to open the **Select items to Grant Access to Users** pane, which enables you to grant the user access rights to selected business units, sites, or teams within the enterprise. Tip Objects to which the user already has access rights are not displayed in this pane.
Remove Access Rights to selected items	Click to remove the user's access rights to selected objects.
Help	Click to view a Help topic about the **Access Rights** pane.
Save Now	Click to save any changes you made to the user's access rights.

Select Items to Grant Access to Users pane controls

Apply	Click to assign the user access to the selected items.
Close	Click to close this pane without applying any changes.
Help	Click to view a Help topic about the this pane.

Roles

Security *Roles* control general permissions (or privileges), as well as access permissions to various modules in WFM Web for Supervisors. Roles do not control access to business units, sites, or teams. To add or restrict access to these specific objects, see Access Rights.

In the Roles view there are two lists:

- The WFM Users list contains these columns: User Name, User First Name, User Last Name, User E-mail, and Role.
- The Genesys Users list contains these columns: User Name, User First Name, User Last Name, and User E-mail.

In the Roles module, you can:

- Import users
- Define a default security role
- Assign security roles to users. Users automatically take on the privileges or permissions configured for the security role to which they are assigned.

> **Tip**
>
> Security roles enable you to set permissions for access to modules but not to business units, sites, or teams. To enable the rights to add or restrict access to these specific objects, you must check the Access Backend Configuration check box in the Role Privileges pane.

Creating Roles

To create a new security role:

1. Go to **Configuration > 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. Assign privileges by expanding items in the list and selecting/clearing the check boxes.
   For a complete description of all privileges, see Role Privileges.
5. Click **Save Now** .

Next Step: Assign the security role to a user.

Using Copy to Create Roles

To create a security role using copy:

1. In the **Roles** pane, select an existing role.
   If there are many roles in the list, enter the role name in the Search field to find it quickly.
2. Click **Copy** .
   A copy of the selected role appears in the Roles list.
3. Select the copy and click **Role Privileges**.
4. Rename and assign privileges to the role by selecting or clearing the check boxes, as required.
5. Click **Save Now** .

Next Step: Assign the security role to a user.

Assigning Roles to Users

WFM enables you to assign and unassign security roles, and delete users from the Assigned Users list. These tasks are described in the procedures below.

To assign users to the role:

1. At the top of the **Role Privileges** pane, click **Users** and then, do 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.
2. Select the users you want to assign to this role and click **Apply** .
3. In the **Users** pane, click **Save Now** .

> **Important**
> New users are automatically granted access to all modules, objects, and sites. Also, only users in the **WFM Users** list can access Workforce Management functionality (with the exception of WFM Web for Agents).

You can also create a new security role using copy and paste. See Editing Security Roles.

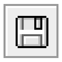
Unassigning Users from Roles

To unassign a user from a security role:

1. In the **Assigned Users** list, select the user to want to unassign from this role.
2. Click **Unassign User** .
3. When the **Confirmation** dialog appears, select **Yes** to proceed or **No** to cancel the action.
4. Click **Save Now** .

Deleting Users from Assigned Users List

To delete a user from the Assigned Users list:

1. In the **Assigned Users** list, select the user to want to remove from this list.
2. Click **Delete User**  .
3. When the **Confirmation** dialog appears,select **Yes** to proceed or **No** to cancel the action.
4. Click **Save Now**  .

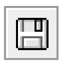
Important

Proceed with caution when clicking **Yes** in the **Confirmation** dialog. Doing so removes all of the user's role privileges and access rights to WFM.

Editing and Deleting Roles

WFM enables you to edit and delete security roles from the Roles list. These tasks are described in the procedures below:

To edit a security role:

1. In the **Role** pane, select the role you want to edit.
   If there are many roles in the list, enter the role name in the **Search** field to find it quickly.
2. Click **Role Privileges**.
3. Rename the role and/or select/clear the check boxes next to the privileges you want to change.
4. Click **Save Now**  .

Deleting Security Roles

To delete a security role:

1. In the **Role** pane, select the role you want to delete.
2. Click **Delete**  .
3. When the **Confirmation** dialog appears, click **Yes** to proceed or **No** to cancel the action.

> **Important**
> Proceed with caution. If you select **Yes**, the action cannot be undone.

Role Privileges

The Role Privileges pane in the Roles module displays an extensive list of modules and objects, to which you can control access. The same list of privileges appears when you select a user in the Users: Role Privileges pane in the Users module.

> **Important**
> New users are automatically granted access to all modules, objects, and sites as described in the Role Privileges overview and sub topics.

See Also:

- General Role Privileges
- Configuration Role Privileges
- Policies Role Privileges
- Calendar Role Privileges
- Forecast Role Privileges
- Schedule Role Privileges
- Trading Role Privileges
- Performance Role Privileges
- Adherence Role Privileges
- Reports Role Privileges
- Notification Role Privileges

General Role Privileges

The role privileges under **General** provide the following user access:

- **Show agent wage field**—Controls user access to view the **Hourly Wage** field in WFM Web for Supervisors **Configuration > Agents > Properties** pane. It also controls whether the user will see agent wage information in the Agent Properties report.
- **Show unassigned agents**—Controls whether the selected user can view unassigned agents that appear in all lists where agents appear. The lists appear in the **Organization** module in **Sites > Teams > Add Agents** and **Sites > Agents > Add Agents**.

> **Important**
>
> New agents without logins (or with logins to multiple switches) are imported automatically during synchronization even if the **Show unassigned agents** option is turned off for the user who triggers synchronization; although they are not visible to this user. The only security for these new agents is **Tenant** security.

- **Allow Backup/Restore**—Controls user access to the WFM Database Utility to perform backups and restores. If cleared, the user cannot log into the Database Utility. For more information on this utility, see the *Workforce Management Administrator's Guide*.

Configuration Role Privileges

Some privileges under **Configuration** are Supervisor views in the **Configuration** module (Read, Edit, Add/Delete, Access Backend Configuration, and Skills settings are not). Select the check box next to each privilege to give the selected user access to configure items related to that privilege.

The role privileges under **Configuration** provide the following user access:

- **Roles/Users**
- **Agents**
    - **Read**—Controls user access to view all panes within the **Agents** views. If unchecked, all other privileges under **Agents** are also unchecked.
    - **Allow Move**—Controls whether this user can move agents to a different team, site, or business unit.
    - **Edit Properties**—Controls whether this user can edit items in the **Properties** pane in the **Agents** view.
    - **Edit Activities**—Controls whether this user can edit items in the **Activities** pane in the **Agents** view.
    - **Edit Contracts & Rotating Patterns**—Controls whether this user can edit items in the **Contracts & Rotating Patterns** pane in the **Agents** view.
    - **Edit Time Off**—Controls whether this user can edit items in the **Time Off** pane in the **Agents** view.
    - **Edit Time-Off Bonuses**—Controls whether this user can edit items in the **Time-Off Bonuses** pane in the **Agents** view.
- **Organization**
    - **Read**—Controls user access to view all panes within the **Organization** views. If unchecked, all other privileges under **Organization** are also unchecked.
    - **Edit**—Controls whether this user can edit items in all views and panes within this module.
    - **Add/Delete**—Controls whether this user can add and delete items in all views and panes within the **Organization** view.
    - **Access Backend Configuration**—Controls configuration access to certain panes in this module. If this right is not assigned to the user these panes are not visible:
        - The **Configuration** pane in **Organization > Business Units** and **Organization > Sites** views.
        - The **Statistics** pane in **Activities** and **Multi-Site Activities** views.
    - **Skills**—Controls user access to skills configuration in the **Organization > Business Units** views.
    - **Time Zones**—Controls user access to time zones configuration in the **Organization** view.
- **Schedule State Groups**—Controls whether this user has access to the **Schedule State Groups** view in this module. Users with this permission can modify the configuration of these groups.
    - **Read**—Controls user access to view all panes within the **Schedule State Groups** views. If unchecked, all other privileges under **Schedule State Groups** are also unchecked.

    - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Schedule State Groups** view.

- **Notifications**—Controls whether this user has access to the **Notifications** view in this module. Users with this permission can modify the configuration of email notifications in WFM.
- **Colors in Schedule**—Controls user access to custom colors configuration for elements in the schedule.
- **Shared Transport**—Controls user access to shared transport functionality (enabled by default). Clear this check box to disable.
- **Time-off Bidding Periods**—Controls user access to the **Time-Off Bidding Periods** view.
    - **Read**—Controls user access to view all panes within the **Time-Off Bidding Periods** view. If unchecked, all other privileges under **Time-Off Bidding Periods** are also unchecked.
    - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Time-Off Bidding Periods** view.
- **Activities**—Controls access to the **Activities** and **Multi-Site Activities** views.
    - **Read**—Controls user access to view all panes within the **Activities** view. If unchecked, all other privileges under **Activities** are also unchecked.
    - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Activities** view.

Policies Role Privileges

Most of the items under **Policies** are all WFM Supervisor views in the **Policies** module (**Read** and **Add/Edit/Delete** are not). Select the check box next to each privilege to give selected users access to configure items related to that privilege.

The role privileges under **Policies** provide the following user access:

- **Read**—Controls user access to view all panes within the **Policies** module. If unchecked, all other privileges under **Policies** are also unchecked.
- **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Policies** module.
    - Time-Off Rules
    - Contracts
    - Shifts
    - Exception Types
    - Meetings
        - **Read**—Controls user access to view all panes within the **Meetings** views. If unchecked, all other privileges under **Meetings** are also unchecked.
        - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Meetings** view.
    - Rotating Patterns
    - Marked Times
    - Time-Off Types

To have this user receive email notifications when there are time-off requests that require manual review, select **Get Notified About Time-Off Request Status Changes**, which appears under Notifications.

Calendar Role Privileges

The role privileges under **Calendar** provide the following user access:

- **Read**—Controls user access to view all panes in the **Calendar** module. If unchecked, all other privileges under the **Calendar** are also unchecked.
- **Add/Edit/Delete**—Controls user access to view, add, and edit agent preferences and exceptions in the **Calendar** module.
- **Prefer/Grant/Decline**—Controls user access to grant or decline agent preferences in the **Calendar** module.
- **Edit Time-Off Limits**—Controls user access to edit time-off limits in the **Calendar** module.

Forecast Role Privileges

The role privileges under **Forecast** provide the following user access:

- **Read**—Controls user access to:
    - Creating Forecast Scenarios.
    - Viewing and edit shared Forecast Scenarios.
    - Viewing the Master Forecast.
    - Extracting the Master Forecast to their own or shared Scenarios.
    - Viewing Historical Data.

> **Important**
> If **Read** is unchecked, all other privileges under **Forecast** are also unchecked.

- **Publish**—Controls user access to all **Read** permissions plus permission to publish to the Master their own Forecast Scenarios or shared scenarios.

  Three security options are available under this **Forecast Publish** right:

    - **Publish IV to Master Forecast**
    - **Publish AHT to Master Forecast**
    - **Publish Staffing to Master Forecast**

    If only one or two of these permissions are granted, the user will not have full security access to the Publish.

> **Important**
> Only those users who have access to **Publish** before migration will have access to the new options after migration.

- **View All Scenarios**—Controls user access to all **Read** permissions plus permission to:
    - View, edit and share all Forecast Scenarios.
    - Extract from the Master Forecast to all Scenarios.
- **Edit Historical Data**—Controls user access to all Read permissions plus permission to:
    - Edit historical data to be used when creating a Forecast Scenario.
    - Copy/paste historical data to/from Excel.

- **Overlays**—Controls user access to all Read permissions plus access to all Overlays functionality in the **Forecast** module.

Schedule Role Privileges

The role privileges under **Schedule** provide the user access to the actions describe below. Select the check box next to each item to give permission to perform that action:

- **Read Master**—Controls user access to view and extract data from the Master Schedule, but not publish to the Master Schedule. (See the special note below.) If unchecked, all other privileges under Schedule are also unchecked.
- **Edit Master**—Controls user access to edit the Master Schedule.
- **Publish**—Controls user access to publish scenarios to the Master Schedule.
- **Clean Up Master**—Controls user access to clean up the Master Schedule.
- **Create Scenario**—Controls user access to create scenarios.
- **Access Shared Scenario**—Controls user access to all schedule scenarios that are marked as **Shared**.
- **View All Schedule Scenarios**—Controls user access to view all schedule scenarios that are marked as **Shared**.
- **Build**—Controls user access to build schedules.
- **Approve Changes**—Controls user access to the **Changes Approval** module, to approve or decline pending changes in schedules that you or others have made.
- **Access Overtime Requirements**—Controls user access to all scheduled overtime requirements that are marked as **Shared**.
- **Overtime Bidding**—Controls user access to the **Overtime Bidding** view and the ability to create, modify, and initiate processing of overtime bidding offers.
    - **Read**—Controls user access to view all panes within the **Overtime Bidding** views. If unchecked, all other privileges under **Overtime Bidding** are also unchecked.
    - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Overtime Bidding** view.

Special Note About Read Master

Check **Read Master** to give user access to view and extract data from the Master Schedule, but not publish to the Master Schedule. Use the remaining check boxes under Schedule to give additional permissions.

When **Read Master** is selected, the user can:

- Extract data from the Master Schedule to an owned or shared Schedule Scenario.
- View their own Schedule Scenarios and/or other Schedule Scenarios designated as *shared* by the creator.

About Scenarios

When working in Web for Supervisors, you can build multiple Schedule Scenarios that may contain different agents, different types of shifts or rotating patterns, etc. You will eventually decide to publish all or part of one of these scenarios to the Master Schedule.

Trading Role Privileges

The role privilege under **Trade** provides the following user access:

- **Trading**—Controls user access to trading information in WFM Web for Supervisors.
    - **Read**—Controls user access to view all panes within the **Trading** module. If unchecked, all other privileges under **Trading** are also unchecked.
    - **Approve Trades**—Controls whether users can accept or decline agents’ schedule trade proposals and add comments in all views and panes within the **Trading** module.

To have users receive email notifications when there are agent trade requests that require manual review, select **Get Notified About Schedule Trading Status Changes**, which appears under Notifications.

For more information, see Trading.

Performance Role Privileges

The role privileges under **Performance** provide the following user access:

- **Read**—Controls user access to view Performance information in WFM Web for Supervisors. All users who have the **Read** privilege for the **Performance** module can see alerts when the configured thresholds have been exceeded.
- **Update Alerts**—Controls user access to modify alert thresholds and save changes in the **Alerts** view in the **Performance** module where users configure thresholds for each metric.

> **Important**
>
> The Alerts function in WFM Web for Supervisors uses Master Forecast and Schedule data as a baseline for acceptable performance results. If user-defined performance limits are violated (for example, if too many interactions are being abandoned, or if service levels fall too low), an **Alert** warning in the **Monitor** view notifies that action may be necessary.

For more information, see Performance Overview.

Adherence Role Privileges

The role privilege under **Adherence** provides the following user access:

- **Adherence**—Controls user access to the **Adherence** module in WFM Web for Supervisors, which monitors real-time agent adherence to the schedule.

For more information, see Adherence.

Reports Role Privileges

The role privileges under **Reports** provide the following user access:

- **Read**—Controls the user's read access to all views and panes within the **Reports** module. If unchecked, all other privileges under **Reports** are also unchecked.
- **Reports Scheduler**
  - **Allow Use of Reports Scheduler**—Control user access to the Reports Scheduler, enabling them to schedule reports generation.
  - **View All Scheduled Reports**—Control user access to view all scheduled reports.

Selecting the check box next to a report enables the selected user to create that report.

For information on how to generate and read Reports, see Reports.

Notification Role Privileges

The role privileges under **Notifications** provide the following user access:

Selecting the check box for each item enables that notification (the default state). Clearing the check box disables that option:

- **Get Notified About Schedule Trading Status Changes**
- **Get Notified About Time-Off Request Status Changes**
- **Get Notified About Time-Off Balance-Affecting Changes**
- **Get Notified About Time-Off Bidding Status Changes**

> Tip
>
> You can set fewer objects (than those in **Configuration > Notification > Targets**) for each user that will be notified by the settings in **Users > Role Privileges > Notifications**.

Calendar

The **Calendar** module contains two sub-modules:

- Select Calendar items to:
    - Add availability, days off, exceptions, shifts, time off, and working hours.
    - Edit agent exceptions, preferences, and time off.
    - Review rotating patterns.
    - Change the time zone to view Calendar items' times in the selected by user time zone.
- Select Time-Off Limits to set time-off limits.

Calendar Items

> **Tip**
> The Calendar module includes Calendar Items (this topic) and Time-Off Limits.

The toolbar buttons are across the top of the window and the action buttons are across the bottom of the window. The Agents and Activities trees are at the top of the **Objects** pane.

Use the **Calendar Items** module to add and edit agents' exceptions, preferences, and time off.

- Exceptions are periods of time when agents are engaged in non-work activities.
- Preferences are agent and supervisor requests for particular shifts, days off, availability, and time off.
- Rotating patterns are rotating work weeks of shifts, working days, working hours, and/or work activities. A rotating pattern can be assigned to an agent or a team.

Calendar Module Controls

Toolbar Buttons

Select a view from the drop-down **Views** menu (on the left side of the toolbar): Calendar Items or Time-Off Limits.

Icon	Name	Description
	**Filter**	Filter the display.
	**Options**	Select whether to include these columns in the table: Team, Reason, Comments, Paid Hours, Hire Date, Submitted.
	**Add**	Add an item (in this view, a calendar item).
	**Edit**	Edit the selected calendar item(s).
	**Prefer**	Change the status of the selected agent request(s) to Preferred.

Icon	Name	Description
	**Grant**	Change the status of the selected agent request(s) to Granted.
	**Decline**	Decline the selected agent request(s).
	**Delete**	Remove the selected calendar item(s).
	**Update Schedule**	Insert time-off items and meeting-specific criteria to the master schedule. (You must be a supervisor with edit rights to the master schedule.)
	**Help**	Display context-sensitive help.

Time Zone

Select the time zone for this instance of WFM by using the drop-down list that appears below the toolbar buttons and above the calendars. The following choices appear in the list:

- **User's**—Specifies the time zone of the current user, as configured for that user in WFM Web.
  - If no time zone is configured for the current user, then WFM specifies the default time zone.
  - If no time zone is configured, then this option is disabled.
- **BU's**—Specifies the time zone of the BU that is selected on the **Object** pane.
- **Site's/BU's**—Specifies the time zone of the site that is selected on the **Object** pane.
  - If more than one site is selected, then WFM specifies the time zone of the BU that is selected on the **Object** pane.
- **Local** (default)—Specifies that data for every site will be returned in that site's local time zone.
- ***Configured time zones***—Specifies the time zone that you choose from the remainder of items in this list.
  - Each remaining item is a configured time zone (and its relationship to GMT). For example, Pacific Standard Time, which is 8 hours earlier than Greenwich Mean Time, is presented as PST (GMT-8.0).

Action Buttons

All toolbar buttons also appear in the **Actions** menu.

In addition, the toolbar buttons **Edit**, **Prefer**, **Grant**, **Decline**, **Delete**, **Update Schedule**, appear as action buttons at the bottom of the **Calendar** window.

Objects Pane

The **Objects** pane, on the left side of the WFM window, displays the database objects that you can retrieve.

Agents Tree

The **Agents** tree displays agents in the Enterprise. The tree is hierarchical from top to bottom: Enterprise, Business Units, Sites, Teams, and Agents.

Activities Tree

The **Activities** tree displays activities in the Enterprise. The tree is hierarchical from top to bottom: Enterprise, Business Units, Multi-site Activities, Activity groups, Sites, and Activities.

Each item in the **Object** trees has a check box, which is either cleared or selected. Checking an item, in one of the trees causes a reaction in the other tree: selecting an agent automatically selects the corresponding activities, and selecting an activity automatically selects the corresponding agent(s)/team(s)/site(s)/business unit.

> **Tip**
> You can simultaneously select items that are located below different sites within the same business unit. Nothing is selected by default.

About the Calendar Items Module

The **Calendar Items** module displays agents' shifts, days off, time off, exceptions, and availabilities. You can filter this display. You can add and edit most types of Calendar items from this display, and you can edit exceptions, working hours, shifts, and availabilities.

Rotating pattern information is read-only. Rotating patterns appear with an RP: prefix. To change rotating pattern settings, you must use the Rotating Patterns pane in the **Policies** module.

Calendar Module Security

The WFM Web defines security access permissions. Users may have full security access to this module, or they may only be able to work with preferred Calendar items.

If you have limited access, then the **Grant**, **Prefer**, and **Decline** buttons are disabled. You can only add, edit, or delete calendar items in **Preferred** status.

Displaying the Calendar View

To view Calendar items:

1. If the **Calendar Items** module is not displayed, select **Calendar** from the **Views** menu.
2. In the three-month Calendar display, select the date(s) to view. Shift-click selects multiple dates.
3. Click **Get data** below the **Object** pane.

Calendar View Columns

Name	Description
Date	Displays the date of the Calendar item.
Site	Displays the site to which the Agent in this row belongs.
Team	Displays the team to which the Agent in this row belongs.
Agent	Displays the name of the agent who has the Calendar item. Calendar items can be applied to sites or teams, but they are displayed and edited agent-by-agent.
Type	Displays the type of the Calendar item (for example, part-day exception).
Item	Displays the name of the Calendar item (for example, Team Meeting or Shift_1).
Start time	Displays the time the Calendar item begins. Some full-day rotating pattern items (Day Off, Any Shift, and Flexible Shift) do not have start or end times. For this reason, the Start time and End time columns are empty for these items.
End time	Displays the time the Calendar item ends. +1 indicates the day after the start time; +2 indicates two days after the start time. Some full-day rotating pattern items (Day Off, Any Shift, and Flexible Shift) do not have start or end times. For this reason, the Start time and End time columns are empty for these items.
Status requested	Displays the status of a Calendar item for a period that has not yet been included in a schedule, as set by the user: Granted, Declined, or Preferred. See Change Preference Status for an explanation of the statuses. See Requested Status vs. Actual Status for an explanation of the status that appears in the status requested and Status actual columns.
Status actual	Displays the status of the Calendar item as resolved by Workforce Manager: **Granted**, **Declined**, **Preferred**, **Scheduled**, or **Not Scheduled**.

Name	Description
	See Change Preference Status for an explanation of the statuses. See Requested Status vs. Actual Status for an explanation of the status that appears in the status requested and Status actual columns.
Reason	Explains why WFM has set an item's actual status to **Declined**. You can display/hide this column by using the Options dialog box.
Comments/Memo	Displays any comments or additional information associated with the Calendar item, including ones that might have been entered by agents when requesting the item using WFM Web for Agents. You can display/hide this column by using the Options dialog box. This column is not sortable.
Paid Hours	Displays the number of paid hours for the calendar item. You can display or hide this column by using the Options dialog box.

How to Use the Calendar

- Select any single date by clicking it.
- Select multiple dates by holding down **Ctrl** while clicking them.
- Select a range of dates by holding down **Shift** while clicking them or by clicking the first day and then dragging the mouse to the last day before releasing the mouse button.
- Select the same day of the week throughout a month by clicking that day's header. For example, to display all Mondays, click **Mon**.
- Display a different year or month by clicking the year or month drop-down arrow.
- Go back a month by clicking **<**, or advance to the next month by clicking **>**.

To retrieve specific data:

1. Select a date or range of dates.
2. Select one or more sites, one or more teams, or one or more agents (within one Business Unit) from the **Objects** tree.
3. Click **Get data**.

   The table displays Calendar items for the selected site, teams, or agents. You can sort the display by clicking the header for any column.

   You can search the table for particular agents by using the **Find Agent** dialog box. To open it, select the table to search and then select **Find** from the **Edit** menu or press **[Ctrl] + F**.

   If the full text is too long to appear in a calendar cell, hover your mouse pointer over that cell. The full text appears in a tooltip.

> ## Important
> By default, if another user adds a new exception type while you have the Calendar open, the new exception type is not selected in the Filter dialog box. To see agents who have an exception of the new type assigned, open the Filter dialog box and select the check box for the new exception type.

Calendar Object Hierarchy

When you enter more than one kind of Calendar item for an agent at the same time, a hierarchy determines which takes precedence. The higher priority item appears as **Granted**, and incompatible lower-priority items appear as **Declined**.

The order of priority for exceptions and preferences is:

1. Granted full-day exceptions.
2. Granted days off.
3. Granted full-day time off.
4. Granted availability.
5. Granted shifts.
6. Granted paid (working) hours.
7. Granted part-day exceptions, granted part-day time off.
8. Rotating patterns.
9. Preferred items (including exceptions, paid hours, and time off with preferred status).

Consistency Checks

After you add an exception or preference in the Calendar, the Calendar performs consistency checks to determine whether it is valid.

To be valid, an exception or preference must:

- Fall within the agent's Contract availability hours.
- Fall within activity hours of operation for activities that the agent can perform.
- Be consistent with the Contract paid hours requirements. Unpaid exceptions are added to the paid hours if they do not violate the Contract availability hours.

In addition, if you are entering multiple part-day exceptions, part-day time off, or a mix of part-day exceptions and time off, these:

- Cannot overlap.
- Must be compatible with a qualifying shift's settings, including meal parameters. (This limitation does

not apply to full-day time off or days off.)

Preference and Exception Considerations

- You can enter multiple compliant Calendar items for the same day. For example, you can enter a shift and a day off for the same day. Or you can enter an availability and a shift for the same day if the shift fits into the availability parameter. WFM Web assigns the item that best fits the agent's schedule.
- You can enter only one full-day exception of a single type per day. However, you can enter multiple part-day exceptions of the same type. (WFM Web sets the status of incompatible Calendar items to **Declined**.)
- You can add or edit preferences and exceptions even after a schedule has been created for the affected days. However, if you make changes after building the schedule, you must rebuild the schedule to pick up the changes.

Explanation of Calendar Colors

The Calendar uses two basic cell colors, light blue and grey, and two colors for selected items, yellow and white.

- Gray indicates a non-selected cell for which data has not been requested. There may be data for that day or there may not.
- Light blue indicates a non-selected cell for which there is data. That is, at some earlier point in this session you selected this date and clicked Get data.
- Yellow indicates a selected cell for which there is data.
- White indicates a selected cell for which data has not been requested. There may be data for that day or there may not.

The calendar uses two text colors, black and red.

- Black indicates that you have not yet requested data for a day, and that cells are not selected.
- Red replaces black when a cell is selected.

Filter Dialog

Use the **Filter** dialog box to change which items appear in the **Calendar Items** module:

1. Select the **Calendar** tab.
2. Select **Calendar Items** from the **Views** menu.
3. Select one or more objects from the **Objects** pane. An object can be:
   - In the **Agents** tree: a business unit, site, team, or agent
   - in the **Activities** tree: business unit, a multi-site activity, site, activity.
4. Select a date or dates on the Calendar.
5. Click **Get data**.
6. Click the Filter icon on the **Calendar Items** module toolbar or select **Filter** from the **Actions** menu.
   The **Filter** dialog box appears. It has three tabs:
   - **Calendar Items** lists all exception types, preference types, time-off types, and rotating patterns.
   - **Status Requested** lists all statuses that can appear in the Status Requested column of the Calendar table.
   - **Status Actual** lists all statuses that can appear in the Status Actual column of the Calendar table.
7. Clear the check boxes for any Calendar items or statuses that you want to hide from the Calendar display. Or select the check boxes for any currently hidden items that you want to display.
8. Click **OK** to save your changes or **Cancel** to restore the existing selections.
   The **Calendar** view is updated to match your selection.

Tip

By default, if another user adds a new exception type while you have Calendar open, the new exception type is cleared in the **Calendar Filter** dialog box. To see agents who have an exception of the new type assigned, open the **Filter** dialog box and select the check box for the new exception type.

Options Dialog

Use the **Options** dialog box to show or hide columns in the **Calendar items** table.

- **Site**—The site of the Agent who appears in that row.
- **Team**—The team of the Agent who appears in that row.
- **Shared Transport**—The shared transport to which the agent (displayed in that row) is joined.
- **Reason**—An explanation for why the actual status is different from the requested status.
- **Comments/Memo**—Any comments or memo made when this calendar item was entered or most recently edited.
- **Paid Hours**—The number of paid hours for the calendar item.
- **Hire Date**—The date that the Agent began work for the company.
- **Submitted**—The date and time that the Calendar item was submitted (by either an Agent or a Supervisor, depending on the type of Calendar item).

To use the **Calendar Options** dialog box:

1. Select the **Calendar** tab.
2. Select **Calendar Items** from the **Views** menu.
3. Select an object from each pane (**Agents**/**Activities**) of the Objects pane.
4. Select a date or dates on the Calendar, and click **Get data**.
5. Click the Options button on the toolbar or select **Options** from the Actions menu.
   The **Options** dialog box opens and lists all available choices.
6. To display a column, select the check box next to its name. To hide it, clear the check box.
7. Click **OK** to save your settings or **Cancel** to discard them.
   The main **Calendar** window re-appears, showing the new settings.

Change Preference Status

Use the Calendar Items module to change the status of an agent's preference, exception, time off, or working hours (shift and availability) request prior to publishing the schedule.

- Before you publish the schedule, the possible actual status settings are **Preferred**, **Granted**, and **Declined**.
- After you publish the schedule, the possible actual status settings are **Scheduled** or **Not Scheduled**.

Preference Statuses

Before scheduling, a preference can be **Granted**, **Declined**, or **Preferred**. After a schedule is built for the dates that include this preference, the status can be **Scheduled** (appears in the schedule) or **Not Scheduled** (does not appear in the schedule).

- A **Granted** preference will appear in the schedule unless it is first removed or unless another preference is added that out-ranks the first one. If this happens, the status of the lower-ranking preference changes to **Declined**.
- A **Declined** preference will not appear in the schedule unless it was declined in favor of a higher-ranking preference and the higher-ranking preference is later removed before the schedule is built. If this happens the preference goes back to its original status, which can be **Granted** or **Preferred**.
- A **Preferred** preference may appear in the schedule if it complies with the scheduling constraints and optimization settings that are configured for your site.

Two columns in the **Calendar Items** module show the preference status: Status Requested and Status Actual. See below for an explanation of the two categories.

To change the status of a not-yet-scheduled item:

1. In the **Calendar's item** column, click the name of the item you want to change.
2. Click an action button for the item's new status: **Prefer**, **Grant**, or **Decline**.
3. Click **OK**.
   The new status appears in the **Status** columns.

> **Important**
> The status can be different in each column, and the **Actual Status** can differ from the status that you just assigned. This is because of the way in which the **Requested** and **Actual Status** columns function, as explained below.

Requested Status vs. Actual Status

Requested Status and *Actual Status* refer to the two ways in which each exception and preference is saved.

- **Requested Status** is the preference's status as entered by the user. If more than one preference is entered on a particular day, each item is saved to the database with the status that it has when entered.
- **Actual Status** is the status as resolved by WFM. WFM evaluates all current exceptions and preferences based on their positions in the calendar object hierarchy. If an agent has multiple preferences for a day, the **Actual Status** indicates how WFM has resolved them.

For example, if an agent prefers a full-day time off, that preference is saved in the database as **Preferred**. If the agent is then assigned (**Granted**) a meeting exception for that day, the exception overrides the preference. WFM evaluates the current set of exceptions and preferences, and notes the time-off preference as **Declined**. However, the database maintains the preference status as Preferred because, until a schedule is generated, the exception can be removed. In this case the preference would again take effect and the preference **Actual Status** would change to **Preferred**.

> **Tip**
> Rotating pattern assignments are **Granted** by default, so they do not need a separate status saved to the database.

Add Calendar Items Wizard

Using this wizard, you can add availability, time off, exceptions, days off, shifts, and working hours. (This wizard is available to supervisors with the appropriate security access.)

To use the wizard:

1. Select the **Calendar** pane.
2. Select **Calendar Items** from the **Views** menu.
3. Select an object from the Objects pane:
   - From the **Agents** tree: a business unit, site, team, or agent
   - From the **Activities** tree: a business unit, multi-site activity, site, or activity
4. Select a date or dates from the Calendar.
5. Click **Get data**.
6. Click the Add Calendar Item icon on the toolbar or select **Add Calendar Item** from the **Actions** menu.

For instructions on filling in each wizard screen, see:

- Choose Activities.
- Choose Agents.
- Choose Calendar Items.

Depending upon the choices that you make on the first two screens, you proceed to one of these screens:

- Add or Edit Start/End Time
- Add or Edit Exceptions
- Add or Edit Shifts
- Add or Edit Time Off
- Comments

The last three screens can also appear when you edit **Calendar** items.

Choose Activities

By default, only the activities and multi-site activities that were selected in the (lower) **Objects** pane when you chose the Add Calendar Items button are displayed, and all are selected.

1. Change the selections, if necessary.
2. Click **Next** to continue.

> ### Tip
> If you select objects from more than one site, the **Choose Calendar Item** page displays a limited list of calendar item types: **Availability**, **Day Off**, **Time Off**, **Exception**, and **Working Hours**.

See also: Add (or Edit) Calendar Items Wizard.

Choose Agents

By default, the business unit, sites, teams, and agents that were selected in the **Objects** pane when you clicked the Add Calendar Items button are displayed and selected.

1. Change the selections, if necessary.
2. Click **Next** to continue.

> **Tip**
>
> If you select objects from more than one site, the **Choose Calendar Item** page displays a limited list of calendar item types: **Availability**, **Day Off**, **Time Off**, **Exceptions**, and **Working Hours**.

See also: Add (or Edit) Calendar Items Wizard.

Choose Calendar Item

To choose a Calendar Item:

1. Select an item from the **Calendar Item Type** group of radio buttons.
   If you selected agents from more than one site on a previous page, then the list of calendar item types is limited to: **Availability**, **Day Off**, **Time Off**, **Exceptions**, and **Working Hours**.

   Depending on your selection here, one of several different screens will appear next. If you select:

   - **Availability**, the next screen is: Choose Start/End Time.
   - **Day Off**, the next screen is: Comments.
   - **Exception**, the next screen is: Choose Exception.
   - **Shift**, the next screen is: Choose Shift.
   - **Time Off**, the next screen is: Choose Time Off.
   - **Working Hours**, the next screen is: Choose Start/End Time.
2. Select an item from the **Requested State** group of radio buttons: **Preferred**, **Granted**, or **Declined**.

> **Tip**
> If you selected **Working Hours** or **Exception**, the required state is preset to **Granted**. If you grant a **Day Off**, Scheduler grants the day off regardless of the impact on service levels.

3. Click **Next**.

> **Tip**
> If WFM Web cannot assign some selections, it opens a window that lists the agents, days, and reasons involved.

See also: Add (or Edit) Calendar Items Wizard.

Add or Edit Start/End Time

To set the start and end time for availability or working hours:

1. Enter the **Start Time**.
   You can either type the start time directly into the field, or use the up or down arrow to select the time.

   > **Tip**
   > For **Working Hours**, your selections must fall within agent availability. For **Working Hours** with a status of **Granted**, your selections override a shift with **Preferred** status and set absolute working hours.

2. Enter the **End Time**, using the same options.
   The **Availability** or **Working Hours** duration cannot exceed 36 hours.
3. Select **Next Day** if the **End Time** is on the day after the **Start Time**.

   > **Important**
   > If you select **Next Day**, the **End Time** must be before 12:00 noon.

4. Enter any comments you want to make regarding this **Calendar item**.
5. Click **Finish**.

Add or Edit Comments

If you selected **Day Off** in the **Choose Calendar Items** screen, the **Comments** screen appears when you click **Next**.

- Type your comments, if you have any, into the **Comments** text box, and then click **Finish**.

The **Calendar** reappears, displaying the new or edited day off.

Add or Edit Exceptions

If you select **Exception** on the **Choose Calendar Item** screen and click **Next**, the **Choose Exception** screen appears.

1. Select an exception type from the **Exceptions** list. This list shows all of the exceptions that are available for the selected agent(s).
   - **Yes**, under **Paid**, indicates that the exception counts as paid time.
   - **No**, under **Full Day**, indicates a part-day exception.
   - **Yes**, under **Convertible**, indicates an exception that can be converted to a **Day Off**.
2. Set the **Start Time** and **End Time**, if necessary.

   ### Tip
   For part-day and full-day exceptions, you can either type times directly into these text boxes, or use the up and down arrows to select the times. Click the down and up arrows to control hours. To change minutes, highlight and type over existing minutes. For example, you could enter a one-minute exception from 10:01 to 10:02.

3. If you select a full-day paid exception, you can select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a work day.
   If you check **Specify Paid Hours**, the **Paid Hours** text box becomes editable.

   ### Tip
   If you enter a start/end time but do not enter a value for **Paid Hours**, then **Paid Hours** will equal **End Time** minus **Start Time** (a value known as **Standard Hours** or **Duration**).

4. If you want to enter comments or additional information about this exception, type it into the **Memos** text box.

   ### Tip
   To learn more about memos in Calendar items, see Exception Memos in the *Workforce Management Administrator's Guide*.

5. Click **Finish**.
   The Calendar reappears, displaying the new or edited exception.

If WFM Web cannot assign some selections, it opens a window that lists the agents, days, and reasons involved.

Multiple Part-Day Exceptions

You can add multiple part-day exceptions for a single day. Certain consistency checks apply:

- The exceptions must be compatible with all shift settings, including meal settings. If they are not, all of the exceptions are declined.
- Part-day exceptions cannot overlap each other or any part-day time-off item.

Add or Edit Shifts

If you select **Shift** on the **Choose Calendar Item** screen, the **Choose Shift** screen appears when you click **Next**.

1. Select a shift name from the **Shifts** list.
   This list shows all shifts that are available for the selected agents and days.
2. Change the **Start Time**, if necessary.
   The drop-down list shows all possible start times for the selected shift, based on the shift's configuration.
3. Enter or change the **End Time**, if necessary.
   You can either type a time directly into the text box, or use the up or down arrow to select the time. The field accepts only times that match the selected shift's configured end times.
4. Select **Next Day** if the **End Time** is on the day after the **Start Time**.
5. If you want to enter a comment, type it into the **Comments** text box.
6. Click **Finish**.
   The Calendar reappears, displaying the new or edited shift.

Add or Edit Time-Off Items

Use this dialog to add new time-off items or edit existing ones.

If you select **Time Off** on the **Add Calendar Item** screen, then the **Choose Time Off** screen appears when you click **Next**.

1. Select a time-off type from the **Choose Time Off** list.
   This list shows all of the time-off types that are configured for the selected site.
2. Select the **Show all** check box to display all time-off types. Clear this check box to display only the time-off types that are applicable to the selected agent.

   ## Important

   If you select a time-off type that is not associated with a selected agent, then WFM assigns the time off but does not enforce the time-off balance rules ...except for limits. If the time-off type counts toward time-off limits, then WFM takes this time-off item into account when calculating limits.

3. Optional: select the **Full Day** check box if the time-off preference is for a full day off.
4. Optional: Adjust the **Start time** and **End time** for this time-off item, if the default values are not correct.
5. Select the check box **Specify Start/End** to enable the **Start Time** and **End Time** fields, then click inside each field to modify the default values for hours, minutes, and AM/PM.
6. Select **Next Day** to the right of the **End Time** text box if duration of the time off ends on the day after it begins.
7. Optional: Specify a nonstandard length of your full-day time-off request.
8. Select the **Specify Paid Hours** check box to enable the **Paid Hours** field, then click inside and enter or select a value to specify the exact number of hours in a full day for this particular time-off item. The **Specify Paid Hours** check box is enabled only if you selected a paid time-off type in the **Choose Time Off** list.

   ## Important

   If you are adjusting part-day time-off preferences, remember that all part-day time-off preferences must comply with all settings for at least one qualifying shift, including meal parameters. You might not need to adjust this value manually. If you selected a single agent, then the default is the number of paid hours/minutes configured for the agent's time-off rule, for the time-off type being inserted. If you selected multiple agents, the default value is `0` (zero).

9. Optional: Select the **Wait-list** check box to specify that the request stays in a **Preferred** status, if a time-off request is denied because the time-off limits have already been reached.
   The request could eventually be granted by a Supervisor, if an opening becomes available, although this is not guaranteed.

10. Optional: Enter a comment inside the **Comments** text box.
11. Click **Finish**.
    The Calendar reappears, displaying the new or edited time-off item.

> **Important**
>
> If you are entering multiple part-day time-off items, these cannot overlap each other or any part-day exception.

Update Schedule Options

Use this functionality to update the selected schedule with time-off calendar items which have the status **Granted**, **Not Scheduled**, **Recalled**, or **Scheduled**.

1. Create a **Granted Time Off** item in the calendar. (Use the Add Calendar Item Wizard.) Its status will be **Granted**, **Not Scheduled**
   OR
   Select a **Time Off** item that has **Recalled**, **Scheduled** status.
2. Click the **Update Schedule** icon () in the toolbar, or the **Update Schedule** button at the bottom right of the WFM window, or select **Update Schedule** from the **Actions** menu.
3. Correct any errors. If there are no errors, then the **Update Schedule Options** dialog box appears, offering three check boxes which are all selected by default:
   - Insert only if there are no errors or warnings
   - Show warnings
   - Auto commit inserted items
4. Clear any check boxes that you do not wish WFM to obey, and click **OK**.
   The selected **Time Off** item is published to the Master Schedule.

> ## Important
> WFM displays a warning under these circumstances:
>
> - When you insert a full-day **Time Off**—either from the Calendar or directly into the Master Schedule—on a day in the Master Schedule that is already a **Day Off**.
> - When you insert a full-day or part-day **Time Off**—either from the Calendar or directly into the Master Schedule—on a day in the Master Schedule that already has an **Exception**.

Edit Calendar Items

To edit a Calendar item:

1. Select an item in the **Calendar** view's table.
   You can edit only one Calendar item at a time.
2. Double-click the selection or click **Edit**.
   The appropriate **Edit** screen displays. See the table below for a list of the Calendar-item types and the edit screen that opens for each.

Calendar Item	Edit Screen
Availability	Add or Edit Start/End Time
Day Off	Comments
Exception	Add or Edit Exception
Shift	Add or Edit Shift
Time Off	Add or Edit Time Off
Working Hours	Add or Edit Start/End Time

Important

If the calendar item's **Exception Type** or **Time-Off Type** has been disassociated from the current site, use the dialog box that appears to select a new **Exception Type** or **Time-Off Type**—one that is still associated with the current site. You can keep the disassociated **Exception Type** or **Time-Off Type**, or you can edit the calendar item, but not both. Alternatively, you can re-associate the missing **Exception Type** or **Time-Off Type** and then do both.

3. Change the **Calendar item's** settings as necessary.

Tip

The available settings depend on the type of item that you are editing.

4. Click **OK** to save your selections, or **Cancel** to exit without saving them.
   The Calendar reappears, displaying any changes that you have saved.

If WFM Web cannot assign some selections, it opens a window that lists the agents, days, and reasons involved.

Review Batch Requests Dialog

The **Review Batch Requests** dialog opens when a supervisor edits (prefers, grants, declines, deletes, or publishes) time-off requests that fall within a bidding period. WFM batches all agent time-off requests within that period and marks them as one request. If a supervisor selects only one or two items in the batch, the dialog opens with a message, such as, *You are about to Grant selected items that are part of a batch request(s), including Time Offs below. Selected action can be applied only to all listed items at once. Do you want to proceed?*

The dialog lists all of the selected time-off items, including the dates, the name of the agent (who is requesting the time off), the start/end times, and the name of the time-off item. The supervisor can select **Proceed** or **Cancel**.

> **Tip**
>
> You can change the way WFM processes time-off batch requests. See the WFM Server Application configuration option **[Calendar Service]** BatchRequest in the *Workforce Management Options Reference*.

Review Calendar Messages Dialog

In the Calendar, if you grant a time-off item that exceeds the time-off limits, Workforce Management (WFM) returns a warning. WFM presents all warnings as a table in the **Review Calendar Messages** dialog box. The columns of the table include the check box column, **Team**, **Agent**, **Date**, and **Message**.

If you have **Prefer/Grant/Decline** and **Edit Time-Off Limits** permissions within the **Calendar** module, you can override the warnings.

1. Select the check box in the leftmost column of each warning that you want to override, or click the **Select All Warnings** button.
2. Click the **Proceed for Selected** button to ignore the warnings and continue.

> **Tip**
>
> Although you can override warnings, you cannot override error messages; their check boxes are disabled.

Time-Off Limits

Under the **Calendar** module, use **Time-Off Limits** to control the number of agents allowed to take time off so that you do not adversely affect the ability to meet service objectives. You can configure time-off limits for the agents who perform a specific activity, all of the agents on a team, or all of the agents in a site. You can also:

- Set limits for the maximum number or maximum percentage of agents who can be on time off at any one time.
- Set different time-off limits for each timestep during the day, enabling more agents to take time off during non-peak work periods.
- See the actual numbers percentage of agents who are scheduled for time off and compare your limits with the actual values.
- Set minimum time-off limits for each timestep. See Setting Minimum Time-Off Limits for details.

Tip

The time-off limits apply to all time-off types that have the **Counts toward time-off limits** parameter selected. You cannot set separate time-off limits for each time-off type.

If the **Counts toward time-off limits** check box is cleared for a time-off type, no time-off limits apply to that time-off type.

After the Master Schedule is published, the Calendar service still allows Agents to enter time-off items. However, these items are automatically resolved as **Not Scheduled**, with the **Reason** *Item is Not Scheduled because different schedule has already been built for this day*. Also, these items are not checked against the time-off limits, because they are not scheduled. This is normal behavior, because planning (the Calendar) usually is done before scheduling.

Setting Time-Off Limits

Use this procedure to modify the Time-Off Limits table manually, or use the Set Time-Off Limits Wizard to set these limits. Also, see Factors Impacting Agent Availability for more information about the impact of setting time-off limits.

1. Select the **Calendar** tab.
2. Select **Time-Off Limits** from the **Views** menu.
3. Select a site, multi-site activity, team, or activity in the Objects tree. You cannot select a business unit or an individual agent.
4. Select the period to be displayed in the table: **Year** (default), **Month**, or **Week**. The granularity associated with the selected period appears in the read-only **Granularity** text box.

5. Enter or select a date by using the date-range selector at the top of the window.
   If you select a day other than the first day of the selected period, the display defaults to the first day. For example, if you select **Month** and then select August 12, the display shows August 1-31.
6. To remove the column from the table, clear the check box beside the name of that column.
   The table displays the current data for the object and dates that you selected. See The Time-Off Limits Table for an explanation of the data presented in each column.

   ### Tip
   The set of columns repeats seven times in each row. Each repeat contains the values for one day of the week.

7. For each period (represented by a row), enter a value directly into the **Max. Agents** or **Max. %** cell, or both. You can copy and paste values from one cell to another using the standard Windows Copy and Paste functions. If you enter values into both columns, WFM applies the lower limit.
   - **No Time-Off Limits**—Leave the cell blank.
   - **No Time Off Allowed**—Enter `0`.
   - **Some Time Off Allowed**—Enter the number or percentage of agents who are allowed to be on time off.

   Cells with gray backgrounds are not editable. They either fall outside the selected period or contain values that WFM generates automatically.

   ### Tip
   If you have chosen **Week** as the period, the minimum row appears. It displays the lowest limit entered into any cell. See Setting Minimum Time-Off Limits for how to use this feature.

8. If you want to set different values for a specific date range, click the **Set Values** button, which is located on the **Action** toolbar, or select **Set Value** from the **Actions** menu. See The Set Values Dialog Box for instructions on using this feature.
9. To keep your changes, click the **Save** button, which is located on the **Action** toolbar, or select **Save** from the **Actions** menu.

   ### Important
   If you reduce the time-off limit for a specific period or if you assign agents to another team after a time-off period is scheduled, the limits for a particular period may be exceeded. In this case, agents retain any previously planned or scheduled time off, even if the limits are exceeded.

The Time-Off Limits Table

The **Time-Off Limits** table displays rows for each week (if the period is **Year** or **Month**) or for each 15-minute timestep (if the period is **Week**).

If you selected the **Week** period, the table also displays a **Minimum** row, which displays the lowest value set in any timestep during the day.

The columns in this table are:

- **Week/Timestep**—If the selected period is **Year** or **Month**, this column contains the dates of each week in the period. If the period is **Week**, the column lists each 15-minute timestep in a day.
- **Max. Agents**—Enter an integer value for the greatest number of agents in the selected site, team, or activity who are allowed to have time off during the selected period. This must be a whole number, so fractions are rounded down.
- **Max. %**—Enter a percentage value for the greatest number of agents in the selected site, team, or activity who are allowed to have time off during the selected period.
- **Max. % Agents**—WFM automatically calculates, to the nearest whole number, the maximum number of agents who can have time off based on the percentage value that you entered. This column is read-only.
- **Actual Agents**—The actual number of agents in the selected site, team, or activity who are scheduled for time off during the selected period. If a schedule is unavailable for that day, agents with granted or preferred Time Off also count as Actual agents with Time Off. This column is read-only.
- **Actual %**—The actual percentage of agents in the selected site, team, or activity who are scheduled for time off during the selected period. This column is read-only.

Setting Minimum Time-Off Limits

To set minimum limits:

1. Select the **Week** period.
2. Enter time-off limits in the cells for each timestep.
   By default, the minimum row shows the lowest limit entered into any cell of a column.
3. To set the minimum for multiple timesteps at once, enter a value directly into one of the cells in the **Minimum** row.
   This new minimum value is automatically applied to all cells that contain a lower time-off limit. Cells with higher time-off limits are unaffected.
   The minimum value set in the **Week** view is displayed as the **Daily** value in the **Year** and **Month** views.

> **Tip**
>
> Although you cannot view the **Minimum** row if you select the **Month** or **Year** view,

entering a time-off limit that is lower than the current minimum into either of these views automatically changes the minimum value shown in the **Week** view.

Set Values Dialog

Use the **Set Values** dialog box to adjust the maximum number or percentage of agents who can have time off at any one time during a specified period.

- Use this feature to adjust the maximum for periods, such as holiday seasons, when you might want to have a different maximum value than during the rest of the year.

To use the **Set Values** dialog box:

1. Select the **Calendar** tab.
2. Select **Time-Off Limits** from the **Views** menu.
3. Select a site, multi-site activity, team, or activity in the Objects tree. You cannot select a business unit or an individual agent.
4. Select **Set Values** from the **Actions** menu, to display the **Set Values** dialog box.
5. Enter a start date and end date for the period.
6. Enter a value for one or both of the following fields:
    - **Max Agent**—The maximum number of agents who can have time off during the specified period. You must enter a positive whole number.
    - **Max %**—The maximum percentage of agents.
        - **No Time-Off Limits**—Leave the text box blank.
        - **No Time Off Allowed**—Enter `0`.
        - **Some Time Off Allowed**—Enter the number or percentage of agents who are allowed to be on time off.
7. Click **OK**, or click **Cancel** to discard your changes.

The **Set Values** dialog box closes, and the new values appear on the Time-Off Limits table.

Set Time-Off Limits Wizard Overview

The **Set Time-Off Limits** (STOL) wizard enables you to use WFM's best estimates of availability, possible days off, and other relevant information to set time-off limits for agents.

1. Select **Set Limits** from the **Action** menu, or click **Set Limits** () in the toolbar.
   The wizard opens to the first page, Choose Dates.
   There are potentially two more screens in the wizard
   - **Specify Weekly Pattern of Possible Days Off**
   - **Specify Date Range Values of Possible Days Off**

   You can finish the wizard from any page, unless you select the Estimate possible days off check box on the Choose Dates page.
2. At each page, select **Next** (or **Finish**) after completing your data entry.
   After you click Finish, WFM calculates the new limits and modifies the Time-Off Limits table, according to your choices.

Factors Impacting Agent Availability

When setting time-off limits, be aware that WFM calculates the number of available agents for every timestep according to:

- The start and end of contract availability—The agent is not available outside of the availability interval.
- The earliest start and latest end time of shifts assigned to the contract—This might further limit the agent's availability interval.
- The activity open hours—Even if the target is not an activity, the agent's availability is limited by the earliest open and the latest close time of the activities, for which the agent is qualified.
- The Rotating Pattern—Strict rotating day-offs, explicitly specified start and end times, and earliest and latest times of the rotating shift.
- Optionally, granted day-offs and full-day exceptions.

STOL Wizard: Choose Dates

Use the **Choose Dates** page in the Set Time-Off Limits Wizard (STOL Wizard) to specify the range of dates for which you will specify **Time Off limits** and other values.

Start Date *spin box*	Enter or select the date that begins the time period for time-off limits that are to be estimated and applied.
End Date *spin box*	Enter or select the date that ends the time period for time-off limits that are to be estimated and applied.
Time-off Limit % *field*	Enter a number to specify the maximum percentage of agents who can be on time off at any one time.
Reduce available agents by ____% *field*	Enter a number to specify the percentage of agents who are to be excluded from the wizard's calculations.
Consider granted Calendar items *check box*	Select to specify that granted items for agents are taken into account by the wizard.
Estimate possible days off *check box*	Select to specify that the weekly pattern will be used in estimates. If this check box is cleared (the default setting), then this is the final wizard page.

Buttons

- Click **Next** to continue (if the **Estimate possible days off** check box is selected) or **Finish** to end the wizard (if the **Estimate possible days off** check box is cleared).
- Click **Cancel** to exit the wizard and make no changes.

STOL Wizard: Specify Weekly Pattern

Use the table on the **Specify Weekly Pattern of Possible Days Off** page in the Set Time-Off Limits Wizard (STOL Wizard) to design a weekly pattern of possible days off for agents, by specifying the percentage of possible days off for agents for each weekday.

> **Tip**
> This page is part of the wizard only if you selected the **Estimate possible days off** check box on the previous (Choose Dates) page.

The table has seven rows, one for each weekday (Sunday through Saturday) row, and these columns:

% of days off	Enter a number to specify the percentage of agents who will receive a day off on each weekday. This is the only editable column in the table, and it can be empty to specify that no value was specified. The value in this column cannot exceed the value in the **Max %** column.
Agents with days off	This column displays the calculated number of agents, in decimal format, using the entered percentage in the **% of days off** column.
Max %	The maximum percentage of agents who can receive a day off.
Total agents	The calculated total number of available agents, averaged for each weekday in the period.
Standard %	The *standard* percentage of total agents who can receive a day off, estimated according to the minimum/maximum number of days off per week and the minimum/maximum number of weekend days off.

Buttons

- Click **Next** to continue or **Finish** to end the wizard.
- Click **Cancel** to abandon the wizard and make no changes.

STOL Wizard: Specify Date Range Values

Use the **Specify Date Range Values of Possible Days Off** page in the Set Time-Off Limits Wizard (STOL Wizard) to specify the maximum number of agents who can have a day off for each day of the specified time period.

The table on this page has a single row for every day in the time period (a week, a month, or a year) that is specified in the **Time Off Limits** table.

> **Tip**
> This page is part of the wizard only if you selected the **Estimate possible days off** check box on the previous (Choose Dates) page.

If you specified a weekly pattern on the previous page, then the value for each date is calculated by multiplying the percentage for the appropriate weekday from the weekly pattern by the total number of agents, and then dividing by 100.

If you did not specify a weekly pattern, or if the value in the pattern for a corresponding weekday is empty, then the value for each date is equal to the value for the same date in the **Standard** column.

The columns in the table are the following:

Date	Displays one row for each day in the date range (a week, a month, or a year)
Weekday	Displays the day of the week for the date in this row.
Agents with days off	Enter the number of agents who could receive a day off on each date. This column contains the only editable values in the table. All other values are calculated or fixed. The value in each cell can be as low as `0` and as large as the corresponding **Max** value.
Max	Displays the calculated maximum number of agents who can receive a day off.
Total agents	Displays the calculated total number of agents who are available for each date.
Standard	Displays the calculated ”standard” number of agents who can receive a day off, estimated according to the minimum/maximum number of days off per week and the minimum/maximum number of weekend days off.

Buttons

- Click **Finish** to end the wizard.
- Click **Cancel** to abandon the wizard and make no changes.

Forecasts

> **Tip**
> Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Forecasts" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

Use the **Forecast** module to create and edit forecast scenarios, and to publish the best scenario to the Master Forecast. See descriptions of the buttons shown in the toolbar image below.

You can use the forecast views to:

- Create forecast scenarios.
- View your scenarios and the Master Forecast.
- Evaluate volume and staffing estimates for your scenarios and the Master Forecast.
- Publish forecast scenarios to, and extract them from, the Master Forecast.
- Add or remove activities from a forecast scenario.
- Create, modify, and apply forecast templates.

About Forecasting

A *forecast* is a prediction of activity workloads for one or more sites, and consists of:

- Predicted customer-interaction volumes, which include information for phone calls, chat, email, outbound calling, back-office work, and so on.
- Predicted average handling time (AHT).
- Staffing (workforce) requirements based on service objectives.

Workforce Management uses these predictions to build optimal schedules for real agents, or for a generic staff of profiles based on those agents. For links to major forecast help topics, see Creating and Working with Forecasts, below.

Creating and Working with Forecasts

1. The first step in creating a new forecast is to create a forecast scenario for one or more activities using the New Forecast Wizard. The Wizard General Parameters screen gives the option of creating a scenario with no forecast numbers (to be supplied later) or basing the scenario on a existing forecast.
2. If you created a scenario with no forecast numbers, open the Scenario Volumes View and use the Volume Build Wizard to build interaction volume and AHT forecasts for each activity. You can use various methods to build volume, including entering values, using historical data or templates.
3. Next, open the Scenario Staffing View and build a staffing forecast for each activity.
4. After you create and evaluate your scenarios, publish the best scenario to the Workforce Management database. This scenario then becomes the Master Forecast. WFM Web builds schedules based on the data in the Master Forecast.

Watch the Videos

Watch the 4-video series about creating, populating, and publishing forecasts, starting with Video 1.

Using the Forecast Scenarios View

The Scenarios View enables you to open and work with existing scenarios. It also enables you to create, edit, or delete forecast scenarios, and to publish them to the Master Forecast.

- In the Modules tree, click **Forecast > Scenarios** to activate the **Scenarios** view.

Using Other Scenario Views

When you open a forecast scenario, the following views appear on a scenario-specific drop-down menu in the toolbar: Volumes, Staffing, Overheads, and Graphs.

- Click a view to open it.

These view options appear on the Views toolbar's Scenarios drop-down list.

Opening additional scenarios adds their view options to these lists. This enables you to switch among views for several open scenarios.

- To remove a scenario's views from the displayed lists, close that scenario.

Using the Master Forecast Views

If you have access rights to the Master Forecast, then the Modules tree's Forecast branch always displays three Master Forecast views (regardless of your scenario selections): Master Forecast

Volumes View, Master Forecast Staffing View, and Master Forecast Graphs View.

- Click these views to open them.

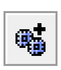
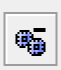
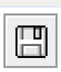
Using Historical Data in Forecasts

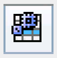
In most cases, forecasts are based on historical data.

- If historical data for interaction volumes and average handling time (AHT) has been imported, you can create both interaction-volume forecasts and AHT forecasts simultaneously.
- If historical data exists for interaction volume but not for AHT, first create the interaction-volume forecast using any of the forecasting methods. Then create the AHT forecast using a template.
- If historical data exists for AHT but not for interaction volume, first create the interaction-volume forecast using templates. Then create the AHT forecast using any of the forecasting methods.

Actions Toolbar

You can use the following buttons on the toolbar (the same commands also appear on the **Actions** menu):

Icon	Name	Description
	**Publish**	Opens the Publish Forecast Wizard, where you can publish a forecast directly to the master schedule.
	**Add activity**	Opens the Add Activity window, where you can add activities to this forecast scenario.
	**Remove activity**	Opens the Remove Activity window, where you can remove activities from this forecast scenario.
	**Save**	Saves your changes to this forecast scenario.
	**Save as Template**	Save this forecast scenario as a template.
	**Build**	Opens the Volumes Build Wizard, which builds volume data for the selected activity.
	**Comments**	Opens the Comments window, where you can enter comments for each day of the forecast.

Icon	Name	Description
	**Open / Close**	Opens the highlighted scenario, closes the current scenario.
	**Use multi-site activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a multi-site activity, business unit, or enterprise in the Objects tree.
	**Required Staffing**	Opens the Required Staffing dialog box. Use it to modify required staffing data in the grid.
	**Split**	Opens the Volume Split Wizard, which splits interaction volumes from a multi-site activity to site-specific activities.
	**Budgeting**	Opens the Budgeting Information dialog box, where you to specify the start and end dates of the target range, paid hours and wage that are to be used by the Staffing Forecast Wizard.

New Forecast Wizard

Tip

Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Scenarios" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

Use the **New Forecast Wizard** (NFW) to create a new forecast scenario. Defining a forecast scenario involves naming the forecast, defining a forecast date range, adding comments (optional), and selecting the activities the forecast will cover. You also have the option of basing the scenario on an existing forecast or building the numbers later.

This is Video 1 in a 4-video series. When you are ready to build volumes for the scenario, watch Video 2.

Link to video

To use the **New Forecast Wizard**:

1. Select the **Forecast** tab.
2. Select **Scenarios** from the **Views** menu.
3. Click **New**  on the **Forecast Scenarios** view toolbar.
   The first of the **New Forecast Wizard's** screens, General Parameters, opens.
4. Fill in the **General Parameters** screen and then click **Next**. The Select Activity screen opens.
5. Select one or more activities and then click **Finish**.

After you create a scenario, you can build interaction volume, AHT, and staffing forecasts, add comments, and publish the scenario. For details, see Forecast Scenarios Overview.

Terminology Review

To better understand WFM forecasting and scheduling views and dialog boxes, it is helpful to review certain WFM terminology.

Activities

Activities are work items that are tracked and managed using Genesys Workforce Management. On a general level, example activities are answering inbound calls, responding to email, completing after-call work, performing scheduled callbacks, and participating in chat sessions. When you create forecasts and schedules, these activities are typically associated with a specific product, such as inbound calls for product A, inbound calls for product B, and so on. In the Configuration Utility, activities are associated with skills. You define separate activities for each site or business unit.

Sites

Sites can be equivalent to switches, which are originally defined in Genesys Administrator and then imported into WFM via WFM Server. See "Creating Switch Objects" in *Genesys Adminsitrator Extension Help*.

You can also create sites 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.

Sites can use *activity sets*, which provide a means to combine activities into groups for multi-skilled scheduling. During that time:

- Agents can only work on the activities defined for the activity set.
- Scheduler cannot schedule meals at times that would interrupt the activity set.

Business units cannot use activity sets.

Business Units

A *business unit* consists of a set of sites that may be grouped together because the agents at the sites perform the same activity, or for ease of management.

Multi-Site Activities

Multi-site activities combine activities at some or all of the sites in a business unit, as well as independent sites, for tracking purposes.

NFW: General Parameters

Use the General Parameters screen in the New Forecast Wizard (NFW) to define your new forecast's name, dates, and other basic information.

1. In the **Name** text box, enter a name for the forecast scenario.
2. If you want to base this scenario on one that already exists, select the existing scenario (or the Master Forecast) from the **Based on** drop-down list. Otherwise keep **None** to create a scenario with no forecast numbers. You can then use the Volumes Build Wizard to populate the forecast.

   Basing your new scenario on an existing scenario is a convenient way to build forecasts with frequently used settings. The wizard takes the dates activities from the source scenario, and applies them to the new scenario. You can then change these parameters.
3. In the **Start date** and **End date** text boxes, enter the scenario's start and end dates.
   You can type directly into each text box, use the up or down arrow to modify the displayed date, or click the button at right to display a calendar.

   > Tip
   > The scenario's date range cannot be more than two years.

4. If you want to fill the new scenario with data from the source (**Based on**) scenario, select the **Copy Data** check box.
   If you did not select a value from the **Based on** drop-down list, this check box is disabled.
5. If you want this scenario to be available to other WFM users, select **Shared**.
6. If you want to enter comments about this scenario, use the **Comments** text box.
7. Click **Next** to proceed to the next screen.

NFW: Select Activity

Use the Select Activity screen in the New Forecast Wizard (NFW) to finish defining your new forecast.

1. Expand the applicable sites or business units.
2. Select the single-site or multi-site activities that you want to be included in this forecast. These are activities previously defined in the WFM Web.
   You can expand business units to display their sites and multi-site activities, and you can expand sites to display their activities. You can select any number of activities.

   By default, all activities are selected when this screen opens. Clear the check boxes for any activities that you do not want to include in this forecast scenario.

   If you selected a value from the General Parameters screen's **Based on** drop-down list, the activities that were in the source scenario are selected in the **Activities** list. You can select any additional activities, or clear selected ones, to customize this forecast scenario.

   > **Tip**
   > You can add activities to a forecast after it has been created.

3. Click **Finish** to generate the new forecast.

Forecast Scenarios

> ## Tip
> Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Scenarios" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

After you create a forecast scenario using the New Forecast Wizard, use the Forecast Scenarios View to open the forecast scenario.

1. Select **Forecast** from the **Home** menu on the toolbar.
2. Select **Scenarios** from the **Forecast** menu.
3. Select a scenario from the list in the data pane, and open it by clicking **Open** () in the toolbar or by double-clicking the scenario itself.
4. Select the open scenario's name from the **Forecast** menu on the toolbar.
   All open scenarios appear on the menu.
5. Select one of these views from the `<selected scenario name>` menu:
   - Volumes—Enables you to build, view, and edit a scenario's interaction volume and average handle time.
   - Staffing—Enables you to build, view, and edit a scenario's calculated and required staffing.
   - Graphs—Displays your choice of statistics for this forecast, using line charts.
   - Overheads—Displays the weekly shrinkage forecast for a selectable period.
6. In the **Objects** tree, select an activity, multi-site activity, site, business unit or enterprise.

Working with Forecast Scenarios

From the Forecast Scenarios view you can:

- View interaction volume and AHT forecasts in the Scenario Volumes view or create interaction volume and/or AHT forecasts using the Forecast Volumes Build Wizard.
- View staffing forecasts in the Scenario Staffing view or create staffing forecasts using the Staffing Build Wizard.
- View the forecast scenario in graph format.
- Add comments to the forecast scenario.
- Publish forecast scenarios to the Master Forecast or extract from the Master Forecast into a forecast

scenario.

Some restrictions apply when viewing or deleting Forecast scenarios:

- Users must have access to at least one Activity or Multi-Site Activity in the Forecast scenario to see it.
- Users must have access to all Activities and Multi-Site Activities in the Forecast scenario to delete it.

For more information about these restrictions, see the **[ConfigService]** MSARestrictAccess configuration option description in the *Workforce Management Options Reference*. The settings in this option determine the level of access to Multi-Site Activities in Forecast Scenarios, as described above.

Forecast Scenarios View

Use the **Scenarios** view to create, open and work with existing forecast scenarios. See the toolbar image below and jump to the button descriptions.

This view also enables you to delete forecast scenarios, publish data from a scenario to the Master Forecast, and extract data from the Master Forecast to a scenario.

Displaying the Scenarios View

1. Select **Forecast** from the **Home** menu on the toolbar.
2. Select **Scenarios** from the **Forecast** menu.

Selecting Objects

When the **Scenarios** view is active, the **Objects** tree displays existing forecast scenarios in a hierarchical list. The **All Scenarios** node expands to display the following options:

My Scenarios	Displays scenarios that you have created.
Shared Scenarios	Displays shared scenarios created by other users.
Other Scenarios	Displays unshared scenarios created by other users. Visible only if you have the appropriate access rights. See the Forecast role privileges

You can select **All Scenarios** or a lower-level option. Your selection retrieves matching scenarios and inserts them into the Scenarios table.

Reading the Scenarios Table

The **Scenarios** table appears at the upper right. Its rows display scenarios that match your selection in the **Objects** tree. The columns (sortable by clicking the header) display the following information for each scenario:

Name	The scenario's name.
Start date, **End date**	The start and end dates for the forecast in this scenario.
Owner	The name of the user who created the scenario.

Shared	A check mark indicates a shared scenario; an open box indicates one that is not shared.
Comments	Remarks entered by a user who created or edited the scenario.

- Click a row in the Scenarios table to populate the Scenario Properties pane with the scenario's details.

Editing a Scenario

To edit a scenario:

- Click its row in the **Scenarios** table and then click Open on the **Actions** toolbar or select **Open** from the **Actions** menu.
- As an alternative, double-click a scenario.

The controls described below are available if you own, or have access rights to, the scenario.

Toolbar: Managing Scenarios

You can use the following buttons on the toolbar (the same options appear in the **Actions** menu):

Icon	Name	Description
	**New**	Opens the New Forecast Wizard.
	**Create Based On...**	Opens the New Forecast Wizard, with the currently selected forecast as the default value in the **Based On** field.
	**Open**	Opens the selected scenario from the **Scenarios** table.
	**Close**	Closes the selected scenario (and prompts you to save unsaved data).
	**Publish**	Opens the Publish Forecast Wizard for transferring forecast information between the selected scenario and the Master Forecast.
	**Delete**	Deletes the selected scenario.
 	**Mark as Shared**, **Mark as Not Shared**	Changes the sharing status of the selected scenario.

Icon	Name	Description
	**Sort**	Opens the Sorting dialog box, which allows sorting by name, owner, sharing, time of creation, time of last modification, scenario start date, or scenario end date. You can sort in ascending or descending order.

Scenario Properties—Data Tab

In the **Scenario Properties** pane at the lower right, click the Data tab to display the following controls:

Name	Enables you to edit the scenario's name.
Start date, **End date**	Displays the scenario's start and end dates.
Owner	Displays the name of the scenario's creator.
Created, **Modified**	Displays the scenario's original creation date and last modification date.
Shared	A check mark indicates a shared scenario; an open box indicates one that is not shared.
Comments	Enables you to enter or edit comments about the scenario.
Save	Click this button to save your changes to the scenario's name and/or comments.
Cancel	Click this button to cancel changes, restoring the scenario's previous name and/or comments.

Scenario Properties—Statuses Tab

Click the **Statuses** tab (in the **Scenario Properties** pane at the lower right) to display a table with the following information:

Activity	Lists each activity in the scenario, preceded by its site or Business Unit.
Volumes	A check mark indicates that interaction volume was built for this activity.
AHT	A check mark indicates that average handle time was built for this activity.
Calc. staff	A check mark indicates that calculated staffing was built for this activity.
Req. staff	A check mark indicates that required staffing was built for this activity.

Scenario Volumes View

Use the **Volumes** view to build or edit the selected forecast scenario's interaction volumes and average handle times. See the toolbar buttons image here and their descriptions below.

This view provides standard date-selection controls and a grid that shows statistics for days or timesteps.

The following sections cover:

- Displaying the Volumes view.
- Setting the data display properties and date range.
- Reading the Data.
- Modifying and managing scenario data.

Displaying the Volumes View

To display the **Volumes** view:

1. Select **Forecast** from the **Home** menu on the toolbar.
2. Select **Scenarios** from the **Forecast** menu on the toolbar.
3. Select a scenario from the list in the data pane, and open it by clicking the **Open** icon () or by double-clicking it.
4. Select the open scenario's name from the **Forecast** menu on the toolbar.
   All open scenarios appear on the menu.
5. Select **Volumes** from the <***selected scenario name***> menu on the toolbar.
6. In the **Objects** tree, select an activity, multi-site activity, site, business unit or enterprise.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

If you do not see any forecast data, you may need to adjust the **Period**, **Granularity**, or **Date** controls at the top of the window to reflect those used for the forecast.

Tip

The grid displays open hours for multi-site activities that you select in the object tree exactly as it displays them for site activities.

Setting the Data Display Properties and Date Range

Use these controls to customize the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, or **Week**.

  ### Important
  Planning Period also appears as a value in the **Period** list if the selected site has a configured planning period.

  If you select **Week**, you can further adjust each row's time range by selecting `15`, `30`, or `60` (minutes) from the **Granularity** drop-down list.
- **Show Statistics** *drop-down list*—Specify what data is displayed in the graph and table by selecting from these choices: **Interaction Volume**, **AHT**, **Interaction Volume and AHT**.
- **Show Columns** *check boxes*—Show (or hide) data columns in the table by selecting or clearing the **Volume**, **Volume %**, and **AHT** check boxes.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Scenario Forecast's** date range.

Reading the Data

The table provides columns that display the following statistics:

Week/Time Step	Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the date range and granularity that you selected above.)
[Days or Dates]	If you select the **Month** date range, each group of columns shows statistics for one full day. If you select the **Week** date range, each group of columns indicates one day, the top row shows daily totals, and each lower row shows statistics for one timestep on that date.

	(Timestep durations depend on the granularity that you selected above.)
IV	Shows the interaction volume forecasted for each day or timestep. You can edit these cells' contents, replacing the displayed values with whole numbers.
IV%	Shows this row's percentage of the day's total interaction volume.
AHT	Shows the average handling time.
Weekly Totals	If you select the **Month** date range, these columns show weekly totals, or averages, for the **IV**, **IV%**, and **AHT** statistics.

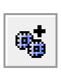
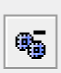
Tip

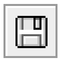
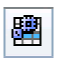
You can copy and paste data between the grid and a spreadsheet. Before doing so, clear the **Volume %** check box so the **IV%** column is hidden.

To edit the **Weekly Totals**:
If you selected the period **Year** or **Month**, you can click inside the **Weekly Totals** cell and edit the value there. Daily values in the same row will automatically adjust their values so that the new **Weekly Total** is redistributed according to the original distribution of volume for each day of the week. This is useful if you have a week in which you believe the volume will be increased, but you expect the volume to arrive at about the same rate as in your original forecast, day-over-day.

Modifying and Managing Scenario Data

You can use the following buttons on the toolbar (the same commands also appear on the **Actions** menu):

Icon	Name	Description
	**Publish**	Opens the Publish Forecast Wizard, where you can publish a forecast scenario directly to the master forecast.
	**Add activity**	Opens the Add Activity window, where you can add activities to this forecast scenario.
	**Remove activity**	Opens the Remove Activity window, where you can remove activities from this forecast scenario.

Icon	Name	Description
	**Save**	Saves your changes to this forecast scenario.
	**Build**	Opens the Volumes Build Wizard, which builds volume data for the selected activity.
	**Comments**	Opens the Comments window, where you can enter comments for each day of the forecast.
	**Close**	Closes a selected open scenario, prompting you to save any unsaved changes.
	**Use multi-site activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a multi-site activity, business unit, or enterprise in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Split**	Opens the Volume Split Wizard, which splits interaction volumes from a multi-site activity to site-specific activities.
	**Adjust**	Opens a dialog box that enables you to adjust the volume, average handling time (AHT), or both for the **Scenario Forecast Volumes** view.

Volumes Build Wizard

Use the Volumes Build Wizard (VBW) to build volume data for one or more selected activities, using parameters that you specify.

- Do this if you selected **None** in the **New Forecast Wizard** General Parameters window or if you wish to overwrite an existing Volumes scenario. If the correct Volumes data already exists in the Scenario Volumes view, you do not need to use this wizard.

> ## Important
> Depending on the build method you specify, you might need to import historical data or create interaction volume, average handling time, or overlap templates before using this wizard.

This is Video 2 in a 4-video series. You can watch Video 1 here or, when you are ready to staff the scenario, watch Video 3.

Link to video

To build volume data:

1. Select a **Volumes** scenario.
2. On the Scenario Volumes View toolbar, click the **Build** button.
   The Volumes Build Wizard's first screen, Select Activities, opens.
3. Complete the Select Activities screen and then click **Next**.
4. Complete the Select Data Build Method screen and then click **Next**.
5. The screens/buttons that appear next depend on the selected build method and whether you want to use an overlap template. If you select:
   - **Use Value**, supply interaction volume and/or average handling time values and click **Finish**.
   - **Expert Average Engine**, **Universal Modeling Engine**, or **Copy Historical Data**, complete the Select Historical Data screen.
   - **Template Based**, or **Use Overlap Templates** on the **Select Historical Data** screen, complete one or more screens for selecting templates.
   - **Expert Average Engine** or **Universal Modeling Engine**, complete the Select Events screen.
6. Click **Finish** in the last screen.
   WFM builds the volumes forecast and the Scenario Volumes View reappears, showing your results.

Forecast Volume Build Wizard Screens

The Volume Build Wizard screens are described in these topics:

- Select Activities
- Select Data Build Method
- Select Historical Data
- Select Templates
- Select Events
- Select Events Distribution

VBW: Select Activities

This is the first screen in the Forecast Volume Build Wizard (VBW). The activities you previously selected for the scenario in the New Forecast Wizard (NFW) Select Activity screen appear for selection.

Use the **Select Activity** screen as follows:

1. Expand business units (if any) to display their sites and multi-site activities, and expand sites to display their activities.
2. Select all of the activities that you want to be included in this volumes forecast.

   You can select multiple activities to build volume forecasts in **batch** mode when configuration information for each activity is identical. If you want to use different historical data or build methods for certain activities, build the volumes for those activities separately.

   If you selected an existing forecast instead of <***None***> from the General Parameters screen's **Based on** drop-down list, the activities that were in the source scenario are selected in the Activities list. You can select any additional activities, or clear selected ones, to customize this forecast scenario.

   > Tip
   > You can add activities to a forecast after it has been created.

3. Click **Next** to continue.
   The next wizard screen, Select Data Build Method, opens.

VBW: Select Data Build Method

Use the **Select Data Build Method** screen in the Volume Build Wizard (VWB) to define how you want to build your volumes data.

1. Select the statistic(s) you want from the **Forecast** drop-down list:
   - **Interaction Volume and AHT**
   - **Interaction Volume**
   - **AHT**
2. Under **Target Dates**, select the date range for the forecast data. The date range cannot be outside the scenario date range.
3. Select the forecast build Method: Template Based, Expert Average Engine, Universal Modeling Engine, Copy Historical Data, or Use Value (see definitions below).
4. Click **Next** to open the wizard's next screen.

The following sections explain the Method options that are available:

Template Based

The default selection. For detailed information about templates, and instructions on how to create them, see Forecast Templates List View. With template-based forecasting, you can build a forecast using preconfigured interaction volume and/or average handling time (AHT) templates.

You also can have the template-based forecasting engine apply percentage growth rate to historical data.

Template-based forecasting is best used by contact centers with very stable interaction patterns or for activities that can be manually forecast, such as back-office work, media interactions, or outbound campaigns.

If you select **Template Based**, after you click **Next**, the screen that opens depends on the Forecast type selected at the top of the Select Data Build Method screen.

- **Interaction Volume and AHT**—The Load Interaction Volume Forecast Templates screen opens.
- **Interaction Volume**—The Load Interaction Volume Forecast Templates screen opens.
- **AHT**—The Load Average Handling Time Forecast Template screen opens.

Expert Average Engine

This method uses the statistical analysis of historical data to produce day-of-week, weekly, and (if sufficient historical data exists) yearly trend patterns.

The **Expert Average Engine** requires at least one full week of historical data. For high-quality day-of-week and weekly results, Genesys recommends that you use a minimum of six weeks' worth of data.

The **Expert Average Engine** applies events in a linear fashion, and this linear perspective smooths out the impact of events across the forecast. Therefore, this engine is best suited to contact centers with fairly stable interaction patterns.

If you select **Expert Average Engine**, after you click **Next**, the Select Historical Data screen opens. If a selected activity does not have historical data, an error message appears and the **Select Historical Data** screen does not open.

Universal Modeling Engine

This method uses a complex algorithm to identify trends and patterns in historical data, which it then uses to create a forecast.

The **Universal Modeling Engine** requires one year's worth, or more, of historical data.

The **Universal Modeling Engine** is configured so that, in its analysis of historical data, it disregards days that contain special events, if those events don't occur during the forecast period. This configuration eliminates misleading *noise* from the forecasts. However, if a special event does occur during the forecast period, the **Universal Modeling Engine** uses the historical data to calculate the impact of the event, and applies it to the baseline forecast. The **Universal Modeling Engine** is best suited to sites with a large quantity of high-quality historical data.

If you select **Universal Modeling Engine**, after you click **Next**, the Select Historical Data screen opens. If a selected activity does not have historical data, an error message appears and the **Select Historical Data** screen does not open.

Copy Historical Data

Appropriate selection if you have some historical data, but not enough to use the **Expert Average** or **Universal Modeling** engines. You can combine the historical data with overlap templates, which fill in gaps in the historical data.

If you select **Copy Historical Data**, after you click **Next**, the Select Historical Data screen opens. If a selected activity does not have historical data, an error message appears and the **Select Historical Data** screen does not open.

Use Value

Appropriate selection if your site activity load is very regular. Applies a specific interaction volume or AHT to each time interval in the scenario.

If the Forecast type is **Interaction Volume and AHT**, selecting **Use Value** enables both the **IV** and **AHT** fields.

If the Forecast type is **Interaction Volume**, only the **IV** field is enabled.

If the Forecast type is **AHT**, only the **AHT** field is enabled.

1. Enter the appropriate value(s) to be used for each cell in the forecast. For **IV**, enter number of interactions per timestep (example: number of interactions per 15-minute interval). For **AHT**, enter the number of seconds that represents average handling time.
2. Click **Finish**.

WFM builds the volumes forecast and the **Scenario Volumes View** reappears, showing your results.

VBW: Select Historical Data

Use the **Select Historical Data** screen in the Volumes Build Wizard (VBW) to define the historical data time range with the option of using overlap templates. If you selected the **Copy Historical Data** method, this screen includes a **Growth Rate** field.

The Wizard brings up this screen if the Build Method is **Expert Average Engine**, **Universal Modeling Engine**, or **Copy Historical Data**.

1. Select the **Start date** of the historical data that you want to use.
   - Select the same day of the week as the forecast scenario's first day. For example, if the target start date is a Tuesday, the historical data Start Date must also be a Tuesday.
2. Select the **End date** of the historical data.

> ## Tip
> If you selected **Copy Historical Data** on the Select Data Build Method screen, this field is disabled. If the **End date** field is enabled:
>
> - You can select a date range as short as one day, or as long as the forecast scenario for which you are building data.
> - The same historical start and end dates are used for all activities selected in the Select Activities screen.

> ## Tip
> Remember that redistributing events does not impact historical data, only the forecast.

3. If the Build Method is **Expert Average Engine** or **Universal Modeling Engine**, you can add additional historical periods to the list, to specify the exact historical data that you wish to be used (and ignore any data that you wish not to be used).
   - Click **Add** to add a new row in the **Use Historical Data** area.
   - Highlight a row in the **Use Historical Data** area and click **Delete** to remove that row.

   > ## Important
   > Multiple rows cannot overlap each other.

4. If you selected the **Copy Historical Data** method on the previous screen, enter a number in the

Growth Rate field. This optional field allows you to increase or decrease the historical data by a specified percent. The value cannot be less than `-100%`.

5. The next series of screens depends on the Build Method and whether you clicked the **Use Overlap Template** check box.
    - If the Build Method is **Copy Historical Data** and you are not using an overlap template, click **Finish**.
    - If the Build Method is **Copy Historical Data** and you are using an overlap template, click **Next** to bring up a screen for selecting templates.
    - If the Build Method is **Expert Average Engine** or **Universal Modeling Engine**, the next screen depends on whether you want to use an overlap template.
        - If you did not check the **Use Overlap Templates** box, click **Next**. The Select Events screen opens.
        - If you checked the **Use Overlap Templates** box, click **Next** to bring up a screen for loading templates.

VBW: Select Templates

Use the screens described below to incorporate templates into your Forecast Volumes scenario. The Volumes Build Wizard (VBW) gives the option of using the following template types:

- Interaction volume templates
- Average handling time templates
- Interaction volume overlap templates
- Average handling time overlap templates

The following sections explain the various forecast template screens:

Interaction Volume Templates

The **Load Interaction Volume Forecast Templates** screen opens if you selected the following in the Select Data Build Method screen:

`**Forecast** = Interaction Volume and AHT or Interaction Volume.`

`**Methods** = Template Based.`

1. Select a template from the **Templates** list on the left.
2. Select **Start** and **End dates** for the template.
3. Check days of the week boxes to indicate when the template should be applied.
4. Click the **>>>** button.
   If you change your mind, click the **<<<** button.
5. If the Forecast type was **Interaction Volume and AHT**, click **Next**.
   The **Load Average Handling Time Forecast Template** screen opens and you must complete that screen.

   > **Tip**
   > If the Forecast type was **Interaction Volume**, the **Finish** button becomes enabled.

6. Click **Finish**.
   WFM builds the volumes forecast and the **Scenario Volumes View** reappears, showing your results.

An error message appears if WFM Web cannot complete the calculation (for example, if historical data contains too few timesteps to cover the scenario's activity hours). This applies to all the template types discussed in this topic.

Average Handling Time (AHT) Templates

The **Load Average Handling Time Forecast Templates** screen opens if you selected the following in the Select Data Build Method screen:

```
Forecast = AHT or Interaction Volume and AHT. (If Interaction Volume and AHT is selected, the
window
appears after clicking Next in the Load Interaction Volume Forecast Templates screen shown
above.)

Methods = Template Based.
```

Except for the title and content of the templates list, the screen appears identical to the **Load Interaction Volume Forecast Templates** screen.

1. Select a template from the **Templates** list on the left.
2. Select **Start** and **End dates** for the template.
3. Check days of the week boxes to indicate when the template should be applied.
4. Click the **>>>** button.
   If you change your mind, click the **<<<** button.
5. Click **Finish**.
   WFM builds the volumes forecast and the **Scenario Volumes View** reappears, showing your results.

Interaction Volume Overlap Templates

Assume there is some bad data in the historical data. One way to compensate for this is to build an overlap template.

The **Load Interaction Volume Forecast Overlap Templates** screen opens if you selected **Use Overlap Template** in the Historical Data screen and previously selected the following in the Select Data Build Method screen:

```
Forecast = Interaction Volume and AHT or Interaction Volume.

Methods = Copy Historical Data, Expert Average Engine, or Universal Modeling Engine.
```

Except for the title, content of the templates list, and day of the week check boxes, the screen appears identical to the **Load Interaction Volume Forecast Templates** screen.

1. Select an overlap template from the **Templates** list on the left.
2. Select **Start** and **End dates** for the overlap template.
3. Click the **>>>** button.
   If you change your mind, click the **<<<** button.
4. If the Forecast type was **Interaction Volume and AHT**, click **Next**.
   The **Load Average Handling Time Forecast Overlap Template** screen opens (described below) and you must complete that screen.

Tip

If the Forecast type was **Interaction Volume**, the **Finish** button becomes enabled.

5. Click **Finish**.
   WFM builds the volumes forecast and the Scenario Volumes View reappears, showing your results.

Average Handling Time Forecast Overlap Templates

The **Load Average Handling Time Forecast Overlap Templates** screen opens if you selected **Use Overlap Template** in the Historical Data screen and previously selected the following in the Select Data Build Method screen:

```
Forecast = AHT or Interaction Volume and AHT. (If Interaction Volume and AHT is selected, the
screen
appears after clicking Next in the Load Interaction Volume Overlap Forecast Templates screen.)

Methods = Copy Historical Data, Expert Average Engine, or Universal Modeling Engine.
```

Except for the title, content of the templates list, and day of the week check boxes, the screen appears identical to the **Load Interaction Volume Forecast Templates** screen.

1. Select an overlap template from the **Templates** list on the left.
2. Select **Start** and **End dates** for the overlap template.
3. Check days of the week boxes to indicate when the overlap template should be applied.
4. Click **Finish**.
   WFM builds the volumes forecast and the **Scenario Volumes View** reappears, showing your results.

VBW: Select Events

Use the Select Events screen in the Volumes Build Wizard (VBW) to factor events into a Forecast Volumes scenario.

Prerequisite: You must create events in the Forecast > Overlays module, and assign them to activities there, before you can add those events to a forecast scenario

- An overlay is anything that can be expected to affect the daily interaction volume of the enterprise and, therefore, staff and schedule requirements.
- An event is a specific instance when an overlay is in effect.

To add events:

1. Select the **Enabled** check box for the events that you want to include.
   Alternatively, you can select the **Use All Applicable** check box to use all applicable events, whether the **Enabled** check box is selected or cleared.
2. If you are using the Universal Modeling Engine, this is all you need to configure. Click **Finish**.
3. If you are using the Expert Average Engine you can also, optionally:
   a. Enter a **Spread Over** value for each event.
      This determines the period that the event affects.
   b. Click **Days** or **Hours**.
      This determines whether the **Spread Over** value is interpreted as days or hours.
   c. Adjust the **Initial Impact** and/or **Ending Impact** value, if appropriate.
      (The default values are based on the event's configuration. If the event is configured to disregard historical data, you cannot adjust these values here. You must change the configuration using the Overlays module.)
   d. Click **Distribution** to view and optionally change the distribution method of the selected overlay.
   e. Check the **Use All Applicable** check box if the forecast build algorithm should use all events or overlays applicable to the selected activities that fall into the scenario/historical data date range. When checked, disables the fields and controls that appear above.
   f. Click **Finish**.

WFM Web calculates the volumes and displays them in the Volumes view. An error message appears if WFM Web cannot complete the calculation (for example, if the historical data contains too few timesteps to cover the scenario's activity hours).

> **Important**
>
> Redistributing events does not impact historical data, only the forecast.

VBW: Select Events Distribution

Use the Select Events Distribution screen in the Volumes Build Wizard (VBW) to view and optionally change the distribution method of the selected overlay in a Forecast Volumes scenario.

> **Tip**
>
> The functionality on this page duplicates the Distribution tab of the Overlays page, if **Always Use Entered Distribution** was selected on the **Properties** tab of that page.

Graph—Displays the same information as the grid below it displays, but in graphical form.

Grid—Displays and allows you to edit the overlay's distribution in the following columns:

- **Daily or Hourly Impact**—Each row displays an increment during which the overlay will be in effect. The actual increment (Day or Hour) is configured in Spread.
- **Distribution Value**—Displays the distribution value of each increment. The default value in each cell is `0`.
  - If the selected overlay is of the type impacting, then you can enter values from `-100` to `9999` into the grid.
  - If the selected overlay is of the type redistributing, then you can enter values from `0` to `100` into the grid.

  > **Important**
  >
  > If the total of all values in the grid does not equal `100`, you will see a warning and will not be able to save your changes to the overlay.

Volumes Split Wizard

Use the Volumes Split Wizard to split a forecast scenario for a multi-site activity:

1. Select a **Scenario Volumes** view that uses multi-site activities.
2. On the Forecast Scenario Volumes view toolbar, click the **Split** button.
3. In the **Split Range Date** screen, enter a **start** and **end date** for the range and click **Next**.
4. In the **Select Multi-site Activities** screen, select the check boxes next to the multi-site activities that you want to split.

> **Tip**
> You can select several multi-site activities within the same Business Unit.

5. To include the average handling time forecasts in the split, select **Use AHT Forecast** and click **Next**. If you select **Use AHT Forecast** but some of the selected activities do not have an AHT forecast, the result for each of these activities will be `0` for the timestep(s) where `AHT=0`.

> **Warning**
> If you do not select **Use AHT Forecast**, the multi-site activity AHT is assigned to the local activities. This overwrites the local activity AHT. If there is no multi-site activity AHT, local activity AHT is simply deleted.

6. If any selected multi-site activity has the type deferred, the wizard will contain additional page: **Specify Service Time**. If this is not true, go to step 9.
7. In the **Specify Service Time** screen, specify the service time for each deferred multi-site activity. This screen displays a grid with the following columns, with one activity per row:
   - **Activity**—The name of the multi-site activity.
   - **Service Time Type**—A drop-down menu with the following values:
     - **Hours, interrupted time (default selection)**—When an interaction is waiting, while the activity is closed, the time is not being counted in the service level calculations.
     - **Hours, non-interrupted time**—When an interaction is waiting, while the activity is closed, the time is still being counted in the service level calculations.
     - **Business days**—The number of business days, including the current day during which the interaction arrived. If the service level = 100% within one business day, then all interactions must be serviced on the same day they have arrived, according to open hours.
   - **Service Time**—The nature of this control depends upon your selection in the **Service Time Type** column.
     - If the granularity is Hours, then this cell in the row is a spin box where you must specify hours, minutes and seconds; and this value must be greater than `0`.

- If the granularity is Business days, then this cell in the row is a field where you must enter or select an integer that is greater than `0`.

> ## Important
> If you switch the granularity from Hours to Business days, WFM Web resets the time value to `0`.

8. Click **Next**.
9. In the **Select Activities within Multi-site Activities** screen:
    a. Select the local (target) activities into which you want to split the multi-site activities. (You can select several target activities.)

> ## Important
> - If you selected **Use AHT Forecast** in step 5, then you cannot select target activities that do not have at least one timestep with at least one AHT value greater than `0`.
> - If you select **Use All Activities**, when WFM splits data for interaction volumes, AHT, and agent availabilities for the selected activities in the scenario, it takes into account the values for all activities in the specified site, whether selected or not.
>
>   Activities that are not selected are not split; WFM Web simply considers them when determining the proportions that are split to each selected activity. This option does not affect the split result if there are no shared multi-skill agents who work on both selected and unselected activities.

10. To ensure WFM considers the existing Calendar items when splitting the interaction volume among activities, select the **Consider Granted Calendar Items** check box.

- Click **Next**.
- In the **Manual Split Parameters** screen, you can enter a percentage in the **Split %** column for each of the child activities of multi-site activities or click in the **Template** column to use a template.
If both **Split %** and **Template** are set for any activity, the template values are used for all non empty time steps. For empty time steps in **Template**, the specified **Split %** value is used. To select a template:

    a. Select the row in which you want to use a template, click the  button.
    b. After the **Use Template** dialog opens, select a template from the list and click **OK**.

> ## Important
> If you click **OK** without selecting a template, the template field will be empty.

- After the **Manual Split Parameters** screen is populated as desired, click **Finish**.
  WFM Web displays a **Progress** dialog box while it splits the activities.
- Optionally, click **Cancel** if you want to cancel the split. After splitting the activities, WFM Web returns to the **Volumes** view.

Splitting Volumes by Percentage

You can specify a percentage to allocate the Volumes from a Multi-Site Activity to each Child (Site) Activity. An interval can be the entire forecast scenario that includes a week, day, and timestep.

At the interval level, when the percentage is specified that is greater than the timestep, WFM propagates the percentage to the remaining timesteps. If a percentage is not specified for certain Child Activities, WFM splits the remaining volumes to those activities, by splitting them by availability. You can specify a different percentage value for each interval.

Adjust Volumes Dialog Box

Use the **Adjust Volume** dialog box to adjust the volume, the average handling time (AHT), or both for a selected Scenario Volumes view.

1. Click **Adjust**  on the **Forecast Volumes** scenario toolbar, to display the **Adjust Volumes** dialog box.
2. Click the **Target** down arrow and select one of the following:
   - **Interaction Volume**
   - **AHT** (average handling time)
   - **Interaction Volume and AHT**
3. Decide how (and by how much) to adjust values in the **Forecast Volumes** grid:
   - Select the **Adjust By (%)** radio button and enter into the field a number to be the percentage by which to adjust existing values that fall within the date range that is specified by **Start Time** and **End Time** below.
     Valid values range from `-99%` to `999%`.
     OR
   - Select the **Set Total** radio button and enter into the field a number to be the total by which to adjust existing values that fall within the date range that is specified by **Start Time** and **End Time** below.
4. Specify the date range to adjust values in the **Forecast Volumes** grid:
   a. In the **Start Time** field, enter or select a start date and timestep.
      Range: any date equal to or later than the date in the upper right of the **Forecast Volumes** grid; `00-23` hours; `00`, `15`, `30`, or `45` minutes.
   b. In the field **End Time**, enter or select an end date and timestep.
      Range: any date later than the **Start Time** date; `00-23` hours; `00`, `15`, `30`, or `45` minutes.
5. Click **OK**.
   WFM adjusts the forecast and the view reappears, showing your results.

Scenario Staffing View

Use the **Staffing** view to edit the selected forecast scenario's calculated and required staffing. See the toolbar buttons here and their descriptions below.

This view provides standard date-selection controls and a grid that shows staffing levels for days or timesteps.

Displaying the Staffing View

To display the Staffing view:

1. Select **Forecast** from the **Home** menu on the toolbar.
2. Select **Scenarios** from the **Forecast** menu on the toolbar.
3. Select a scenario from the list in the data pane, and open it.
4. Select the open scenario's name from the **Forecast** menu on the toolbar.

> **Tip**
> All open scenarios appear on the menu.

5. Select **Staffing** from the ***<selected scenario name>*** menu on the toolbar.
6. In the **Objects** tree, select an **activity**, **multi-site activity**, **site**, **business unit**, or **enterprise**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

If you do not see any data, you may need to adjust the **Period**, **Granularity**, or **Date** controls at the top of the window to reflect those used for the forecast.

Setting the Data Display Properties and Date Range

Use these controls to customize the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, or

Week.

> ## Important
> **Planning Period** also appears as a value in the **Period** list if the selected site has a configured planning period.

If you select **Week**, you can further adjust each row's time range by selecting `15`, `30`, or `60` (minutes) from the **Granularity** drop-down list.

- **Show Statistics** *drop-down list*—Specify what data is displayed in the graph and table by selecting from these choices: **Calculated Staffing**, **Required Staffing**, **Calculated and Required Staffing**.
- **Show Columns** *check boxes*—Show (or hide) data columns in the table by selecting or clearing the **Calculated** and **Required** check boxes.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the Scenario Forecast's date range.

Reading the Data

The table provides columns that display the following statistics:

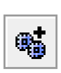
Week/Time Step	Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the date range and granularity that you selected above.)
[Days or Dates]	If you select the **Month** date range, each group of columns shows statistics for one full day. If you select the **Week** date range, each group of columns indicates one day. The top row shows daily totals measured in **Full-Time Equivalents** (defined below). Each lower row shows statistics for one timestep on that date. (Timestep durations depend on the granularity that you selected above.) **Full Time Equivalent** (FTE) is a standard measurement used within contact centers that allows the analyst to do an "apples-to-apples" comparison of the number of agents required to handle the expected interaction volume, across activities that may have different open hours, different planned overheads, and so on. WFM provides the number of FTEs for informational purposes only. It does not affect the Intra-Day

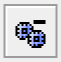
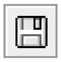
	staffing requirements that WFM produces, which is the basis for building schedules.
Calc	Shows the calculated number of agents for each day (measured in Full Time Equivalents) or for each timestep (measured in **Single Skill Equivalents**). You can edit these cells' contents. See **Req** column for more information on **Calculated** and **Required Staffing**.
Req	Shows the required number of agents for each day (measured in Full Time Equivalents) or for each timestep (measured in **Single Skill Equivalents**). You can edit these cells' contents. WFM populates **Calculated Staffing** when you build staffing through the Staffing Build Wizard. **Required Staffing** is a user-defined data series. It can be populated based on data from the **Calculated Staffing** data series, or you can copy and paste data from an external spreadsheet into these columns. When building schedules, the Use Required option lets you base a schedule on **Calculated** or **Required Staffing**. This allows you to take the staffing forecast that WFM provides and adjust it in a user-defined way.
[Weekly Totals]	If you select the **Week** date range, the columns at right show weekly totals for the displayed statistics.

> **Tip**
> You can copy and paste data between the grid and a spreadsheet.

Modifying and Managing Scenario Data

You can use the following buttons on the **Actions** toolbar (these commands also appear on the **Actions** menu):

Icon	Name	Description
	**Publish**	Opens the Publish Forecast Wizard, where you can publish a forecast directly to the master schedule.
	**Add activity**	Opens the Add Activity window, where you can add activities to this forecast scenario.

Icon	Name	Description
	**Remove activity**	Opens the Remove Activity window, where you can remove activities from this forecast scenario.
	**Save**	Saves your changes to this forecast scenario.
	**Save as template**	Opens the Save as Template dialog box, where you can save data from this scenario as a forecast template.
	**Build**	Opens the Staffing Build Wizard, which builds staffing data for the selected activity.
	**Comments**	Opens the Comments window, where you can enter comments for each day of the forecast.
	**Close**	Closes this scenario, prompting you to save any unsaved changes.
	**Use multi-site activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a **multi-site activity**, **business unit**, or **enterprise** in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Required staffing**	Opens the Required Staffing Wizard, where you can set the forecast's required number of agents.
	**Split**	Opens the Staffing Split Wizard, which splits staffing from a multi-site activity Staffing forecast scenario.
	**Budgeting**	Opens the Budgeting Information dialog box, where you can specify the start and end dates of the target range, paid hours and wage that are to be used for FTE calculations.

Required Staffing Wizard

Use the Required Staffing Wizard to define required staffing values in a forecast scenario's Staffing view.

> **Tip**
> Before selecting the template option in this dialog box, create templates as needed.

To set required staffing by using this wizard:

1. Open a **Forecast scenario**, and its staffing view.
2. Select **Required Staffing** from the **Action** menu or click the toolbar icon ().
   The **Required Staffing Wizard** starts.
3. Select one of the following radio buttons at the **Select Data Source** screen:
   - **Load Calculated Staffing**—Apply calculated staffing to required staffing with no changes.
     a. Click **Finish**.
        The wizard ends here, if you make this choice.
   - **Load Calculated Staffing, adjusted by**—Enter (into the adjacent field) a percentage by which to adjust calculated staffing, before applying it to required staffing. Valid values are from -99 to 999.
     a. Click **Finish**.
        The wizard ends here, if you make this choice.
   - **Load Calculated staffing, adjusted using overheads**—Use the overheads will be selected in the **Select Overheads** screen to adjust calculated staffing, before applying it to required staffing.
     a. Click **Next** to display the **Select Overheads** screen.
     b. Select one or more items from the list.
        WFM applies the overheads that you select to calculated staffing and saved as required staffing.
     c. Click **Finish**.
        The wizard ends here, if you made this choice.
   - **Use Templates**—Apply the staffing templates that will be selected in the **Select Templates** screen to required staffing.
     a. Click **Next** to display the **Select Templates** screen.
     b. Select one or more templates from the **Templates** list on the left side, and click the **>>** button to move your selections to the **Applied Templates** list on the right side.

> **Tip**
> You can modify a template's characteristics after selecting it on the left side and before moving it to the right side.

c. Optional: Select each template on the left side and adjust its configuration using the controls below the list: **Start Date**, **End Date**, and day of the week check boxes.

d. When you have made all necessary adjustments, click Finish.
The wizard ends here, if you made this choice.

About Required Staffing

Required—staffing data is user-defined staffing requirements for a forecast scenario.

- If you have compiled calculated-staffing values, you have the option of setting required staffing to the same values as calculated staffing.
- Forecasts can contain both calculated and required data. You can build schedules by using either set of data.
- Required staffing can be composed of a combination of template values, manually entered amounts, and calculated staffing values.

Staffing Budgeting Information

Use the **Budgeting Information** screen to enter the paid hours and wage you want to use in the forecast.

1. For each field, enter or select the value to apply to the forecast.
2. Click **OK**.

Target Date Range:

- **Start date**
- **End date**

Budgeting Information:

- **Paid Hours a Day**
- **Hourly Wage**

Staffing Build Wizard

Use the Staffing Build Wizard to build staffing data for a selected single-site activity or multi-site activity, based on parameters that you provide. For information about building staffing forecasts for multiple activities, see Staffing Build Wizard for Multiple Activities.

Important

Before using this wizard to build a staffing forecast, take these required actions:

- Build interaction volumes and AHT for activities.
- If necessary, create templates.
- Build a volume forecast for multi-site activity for both IV and AHT.
- Be aware that even if there is IV and AHT data for all child activities, this wizard does not build a staffing forecast for the parent multi-site activity.

This is Video 3 in a 4-video series. You can watch Video 2 here or, when you are ready to publish the forecast scenario, watch Video 4.

Link to video

To build staffing data:

1. On the Scenario Staffing View toolbar, click the **Build** button.
   The Staffing Build Wizard's first screen, Provide Target Date, opens.
2. Fill in the Provide Target Date screen and then click **Next**.
3. Fill in the Provide Target Options screen and then click **Next**.
4. The screen that appears next depends on what kind of activity you are staffing. If you are staffing:
   - An **Immediate** activity, and you select the **Use Service Level Objectives check** box, the Specify Service Level Objectives screen opens.
     If you do not select Use Service Level Objectives, the Staffing Requirements screen opens.
   - A **Deferred** activity, the Multimedia Service Level Objectives screen opens.
   - A **Fixed-Staff** activity, the Staffing Requirements screen opens.
5. Fill in each screen that opens, and then click **Finish**.
   The wizard closes and the Scenario Staffing View opens.
6. Alternatively, if you selected **Compare results with previous** on the second wizard screen, the **Scenario Build Results** window opens.

The types of activities mentioned in the procedure above are described as follows:

- **Immediate** activity—Work activities that are handled by agents immediately, such as voice calls.
- **Deferred** activity—Backlog activities, such as email, that use special forecasting calculations.
- **Fixed-Staff** activity—Non-CTI activities that do not use Workforce Management service objectives.

Fill in each screen that opens, and then click **Finish**. In some cases, the **Staffing Build Wizard** displays values for objectives that were used for the most recent staffing build or the default forecasting objective values (if these have been specified and there were no previous builds). Otherwise, the parameter values are left blank.

Forecast Staffing Build Wizard Screens

The **Staffing Build Wizard** screens are described in the following topics.

- Provide Target Date
- Provide Target Options
- Specify Service Level Objectives
- Specify Multimedia Service Level Objectives
- Staffing Requirements

Staffing Build: Provide Target Date

Use the **Provide Target Date** screen in the Staffing Build Wizard to specify the target date range.

1. Select a Start Date and End Date using the spinner or the calendar.
2. Click **Next** to continue.

Staffing Build: Provide Target Options

Use the **Provide Target Options** screen in the Staffing Build Wizard to specify the options described below.

Indirectly Occupied Time

At a minimum, enter a value for **Indirectly Occupied Time** (IOT). IOT is a parameter that helps define the queuing model that WFM uses when building a staffing forecast. Here is why:

There is a certain pool of agents that WFM considers in its queuing model when determining how calls would be distributed from the queue to agents. IOT affects the availability of agents to handle calls. For example, if IOT is defined as `10%`, that means that `10%` of the time, an agent will not be in the agent pool (because the agent is off the phone).

To use template data, select the **Use Template Data** check box and click the **Load Templates** button to load the specific templates that you want to be used.

Initial Queue

If the selected activity has the type **Deferred**, then the **Initial Queue** field is displayed and inside it you must enter an integer value that is `0` or greater. You can leave this value empty, to indicate that the build process will assume that the value is `0`.

Select the **Save initial queue time in default SL properties** check box if you want to save the initial queue value that you have specified as the new default service level value.

How is the Initial Queue Value Determined?

WFM Server posts a default value in **Initial Queue** field, based on existing information and calculations. WFM Server uses the ending queue value of the previous day as the default value. If it is the first day of Forecast scenario, this value is taken from Master Forecast.

This same value is used in the Contact Center Performance Report > Queue > Forecasted column for the first day of the new forecasting period after you publish the Master Forecast.

For example, if you have published the Master Forecast for 02/02 - 08/02, the Contact Center Performance Report > Queue > Forecasted column for 09/02 displays the backlog value that is proposed in the Staffing Forecast Build wizard for 09/02 in the **Initial Queue** field.

> Tip

The **Initial Queue** field is hidden for all activity types except **Deferred**.

Use Service-Level Objectives

Select this check box to enable the Specify Service Level Objectives screen, later in the wizard.

Save IOT in default SL properties

Select this check box to save the IOT value as the new default value.

Compare Results with Previous

If you want to compare the results obtained from the **Staffing Build Wizard** with the previous staffing scenario results, select the **Compare results with previous** check box.

If you do so, after you have completed the wizard, the Staffing Build Results window opens, showing a comparison of the new and previous results.

Save default SL objectives

If you are building staffing for a single (or multi-site) **Immediate** activity type, you can choose to update some or all of the default service level objectives with the new values you have specified. In the next step of the **Staffing Build Wizard**, you'll be able to choose which parameter values to save as the new defaults by selecting the **Update activity default SL objective** check box for each parameter you want to update. You can then apply the updates in one of two ways:

- **Remove all** is the default setting. For each parameter where the **Update activity default SL objective** option is selected, the default service level objective value for that parameter is updated to the new specified value while the default values (or templates) for all other parameters are cleared.
- When **Append selected** is selected, the default service level objective value for each parameter where the **Update activity default SL objective** option is selected is updated to the new specified value. The default values for all other parameters remain unchanged.

If you do not select the **Update activity default SL objective** check box for any parameters, the default values remain unchanged.

Click **Next** to open the wizard's next screen.

Staffing Build: Service Level Objectives

Use the **Specify Service Level Objectives** screen in the Staffing Build Wizard to define service level objectives when you are building staffing volumes for an immediate activity.

1. Select the check box(es) for one or more of the following:
   - **Use Estimated Average Time to Abandon (sec)**—This is not a service objective. It is a parameter that helps define the queuing system model used internally by WFM when building staffing requirements. The value you configure here should represent the average time it takes impatient callers to abandon.
   - **Use Service Level Objective**—You can specify that you want a specified percentage of calls answered in a specified number of seconds. For example, when building a staffing forecast, you may specify that 80% of calls should be answered in 20 seconds.
   - **Use Average Speed of Answer Objective—ASA (sec)**.
   - **Use Occupancy Objectives—Maximum Occupancy Rate (%)**. The total amount of time the agent is actually doing activity work as a percentage of the total amount of time the agent is available to do activity work. For example, assume an agent has a shift from 8am-5pm, with a 30-minute lunch and 2x15-min breaks. Although the agent's total shift duration is 9 hours, the total amount of time the agent is actually available for work is 8 hours, after subtracting the time for the lunch and breaks.
   - **Use Abandoned Interaction Objective—Maximum Percent of interactions Abandoned (%)**.
2. Enter values for each objective that you selected.

> ## Tip
> When you select an objective's check box, you enable the text boxes for these target levels.

3. If you want to load an existing template to specify an objective's service levels, select **Use Template Data** and then click **Load Template**.
   You might want to use a template if the values for the objective are different for different timesteps. Otherwise, WFM uses the single value that you configure, and applies it across all open hours of the activity.
4. If you want to update the default service level objective values for the current activity type with the new values you have specified, select the **Update activity default SL objective** check box for each parameter you want to update. When building the staffing, WFM saves these new values as the default service level objectives for the current activity type.

> ## Important
> If you are using templates to specify the parameter values, you can select only one template to save when choosing to update the default service level objectives for the activity. The **Staffing Build Wizard** will prompt you to select the template you want to save. The staffing will be built according to the values of all selected templates, but only the template selected to be saved will update the default service level objective

value.

5. Click **Finish**.
   WFM Web calculates the staffing volumes and displays them in the Staffing view. An error message appears if WFM Web cannot complete the calculation.

Tip

You can see the effect of other values by using the What-If window in the **Performance** module.

Staffing Build: Multimedia Service Level Objectives

Use the **Specify Multimedia Service Level Objectives** screen in the Staffing Build Wizard to define service level objectives when you are building staffing volumes for a Deferred staffing activity, such as responding to emails.

Use either one of the following two procedures:

1. Fill in the percentage target for % of Deferred Work in

a. Enter a value into each of the following fields: **Hrs**, **Min**, and **Sec**.

b. Select a radio button from this group:
   - **Hours (default)**—use these controls:
     - In the field below this choice, enter hours, minutes, and seconds.
     - Select one of these radio buttons: **Non-interrupted Time** (default) or **Interrupted Time**.
   - **Business days**—In the field below this choice, enter an integer greater than `0`.

c. Select the **Save Deferred work in default SL properties** check box if you want to save the multimedia service level values you have specified as the default service level objective values.

d. Click **Finish**.

— OR —

2. Use the Service Level Template

a. Select the **Use Service Level Template**.

b. Click **Load Template** to load an existing template.

c. Select the **Save Deferred work in default SL properties** check box if you want to save the multimedia service level values specified in the template as the default service level objective values.

d. Click **Finish**.

More About Interrupted and Non-Interrupted Time

When WFM calculates staffing, selecting interrupted time or non-interrupted time determines whether or not the Activity closed hours are counted.

For example, if you select **Interrupted Time** WFM does not account for the Activity closed hours when calculating the "idle in queue" time of interactions. If you select **Non-interrupted Time** WFM does account for the Activity closed hours when calculating the "idle in queue" time of interactions.

Staffing Build: Staffing Requirements

Use the **Staffing Requirements** screen in the Staffing Build Wizard to define how staffing requirements are built. You will use this screen for Immediate activities if you do not define any service objective, or for Fixed-Staff activities.

1. Do one of the following:
    - Select **Number of Agents Each Time Step** and enter the appropriate number in the text box to the right.
    - Select **Average Activity Handling Time** and enter the appropriate value (in seconds) in the text box to the right.
    - Select **Use Staffing Template** and click **Load Template** to load an existing template.
2. Select the **Update activity default staffing requirements** check box if you want to update the default staffing requirement values with the new values you have specified.
3. Click **Finish**.
   WFM Web calculates the staffing volumes and displays them in the Staffing view. An error message appears if WFM Web cannot complete the calculation.

Staffing Build Wizard for Multiple Activities

Use the **Staffing Build Wizard** to build staffing data for multiple activities, based on the default forecasting objectives.

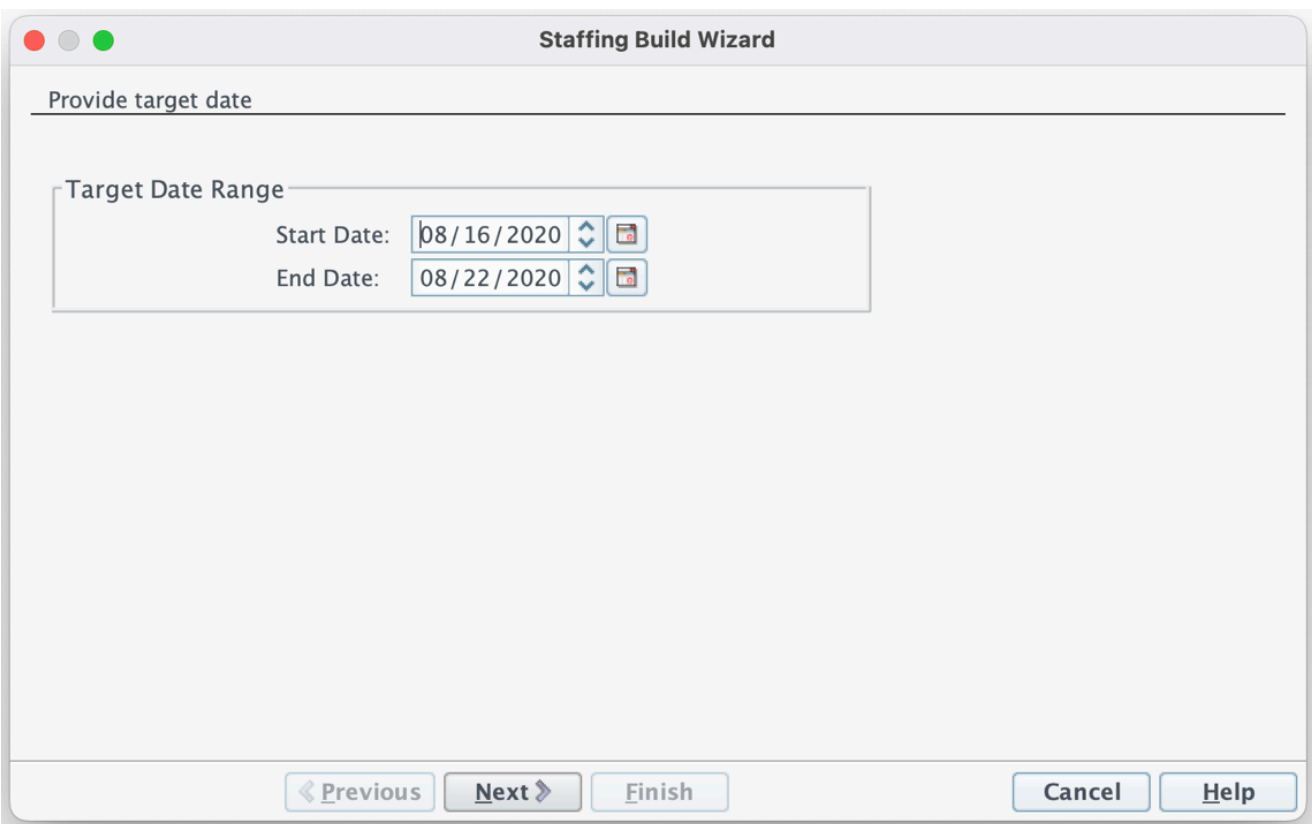
The **Staffing Build Wizard** uses the default forecasting objectives that were defined for each of the following activity types (for activities under sites and multi-site activities):

- Immediate—Work activities that are handled by agents immediately, such as voice calls.
- Deferred—Backlog activities, such as email, that use special forecasting calculations.
- Fixed-staff—Non-CTI activities that do not use Workforce Management service objectives.

You won't be able to make changes to these values when using the wizard to build staffing for multiple activities.

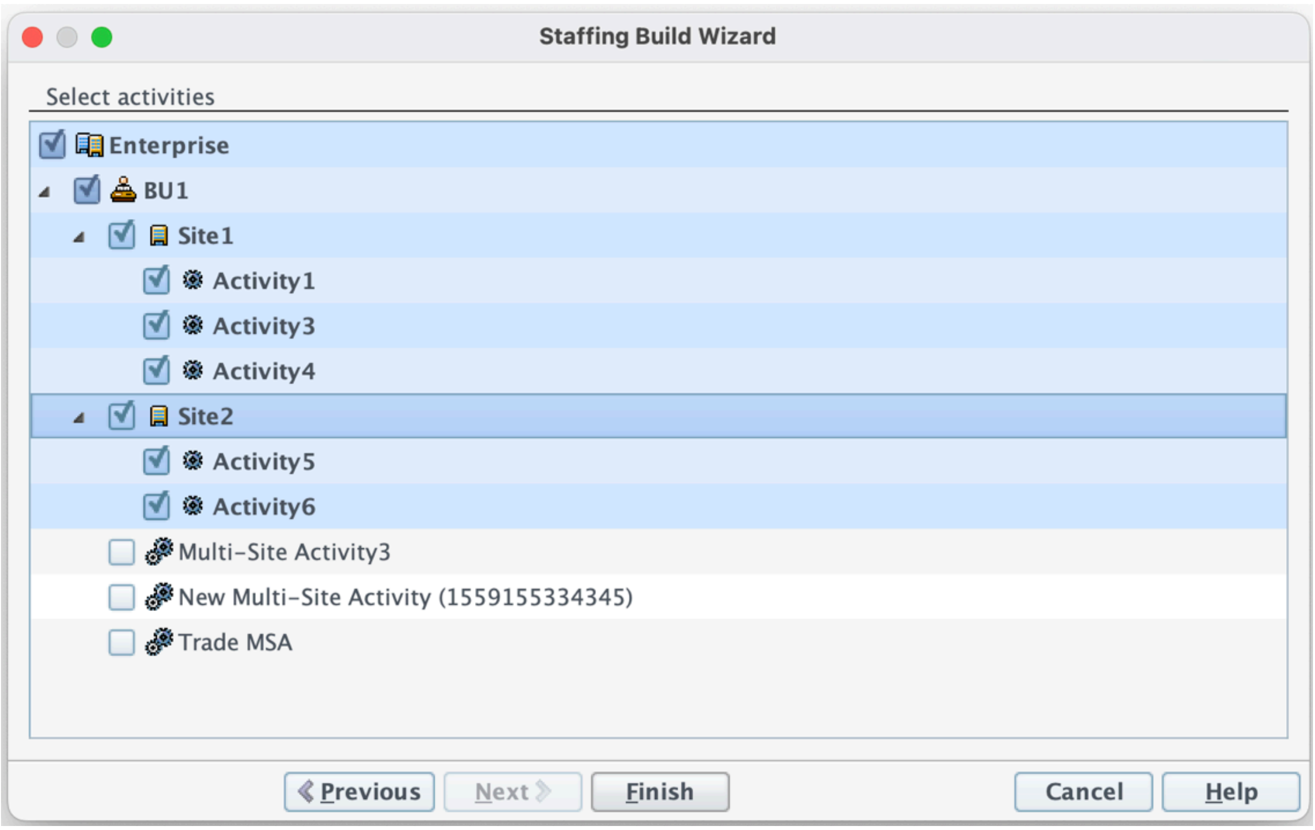
To get started, select a Site or BU from the **Enterprise** panel. In the scenario's **Staffing** view toolbar, click **Build** to launch the **Staffing Build Wizard**.

Step 1: Specify target dates



- Use the **Provide Target Date** screen in the **Staffing Build Wizard** to select the **Target Date Range**.
- Select the **Start Date** and **End Date** for the target date range. By default, the scenario's start and end date displays.
- Click **Next**.

Step 2: Select activities



- Expand business units to display their sites and activities.
- Select the activities you want to build staffing data for.
- Click **Finish**.

Staffing Build: Results View

If you selected the **Compare Results with Previous** check box on the first screen of the Scenario Staffing Build Wizard, the **Scenario Staffing Build Results** view opens after you click **Finish** to complete the wizard.

The graph shows the new calculated staffing compared to the original calculated staffing.

- Where the new calculated staffing results in an increased number of agents, the graph shows the area in red.
- Where the new calculated staffing results in a decreased number of agents, the graph shows the area in green.

Click **Save** to keep the new calculated staffing in your scenario, or **Discard** to return to the original calculated staffing values.

Staffing Split Wizard

Use the **Staffing Split Wizard** to split staffing from a multi-site activity **Staffing forecast** scenario.

Multi-site Activities

A multi-site activity (virtual activity set) has one or more associated activities (existing activities). After building calculated and required staffing for a multi-site activity, you can then use this wizard to split the result between associated activities.

> **Tip**
>
> The **Staffing Split Wizard** is available only within a **Forecast Scenario**. You must add a multi-site activity to the forecast scenario for them to be available for splitting in **Staffing Split Wizard**.

To use the Staffing Split Wizard:

1. In a currently-open forecast scenario, select a multi-site activity with already-built staffing values.
2. Click the **Split** button on the **Forecast Scenario Staffing View** toolbar.
   The first of the Staffing Split Wizard's three screens, Select Multi-site Activities, opens.
3. Select the check boxes next to the multi-site activities that have staffing values you want to be split between associated activities.
   You can select several multi-site activities within the same business unit.
4. Select **Use AHT Forecast** if you want WFM Web to consider average handling time forecasts when performing the split and then, click **Next**.
   The wizard's second screen, Select Activities within Multi-site Activity, opens.
5. At the bottom of the pane, enable (enter a check mark) in the **Split Required Also** check box, if you want required staffing to also be split.
6. Select the local (target) activities into which you want to split the multi-site activities and then, click **Next**.
   The wizard's third screen, Specify budgeting data, opens. The top half of the screen displays a table with a row for each site in the forecast. Each site row contains these columns
   - **Site**
   - **Activity**
   - **Hours** (corresponds to the **Paid Hrs/Day** text box below the table)
   - **Wage** (corresponds to the **Hourly Wage** text box below the table)
7. To change an individual value, click a number inside an **Hours** or **Wage** cell of the table, and type a

new value.

8. To change all values in a column of the table at once, click inside the corresponding text box below the table, and then click **Set All**.
   You can change one, some, or all fields. See the Staffing Build Wizard topic for definitions.
9. Click **Finish**.
   WFM Web displays a Progress dialog while it splits the activities.
10. Optionally, click **Cancel** in this dialog if you want to cancel the split.
   After splitting the activities, WFM Web returns to the Staffing View.

Scenario Graphs View

Use the **Graphs** view to display the selected forecast scenario's data in a line chart. See the toolbar image here and the button descriptions below.

Displaying the Graphs View

To display the **Graphs** view:

1. Select **Forecast** from the **Home** menu on the toolbar.
2. Select **Scenarios** from the **Forecast** menu on the toolbar.
3. Select a scenario from the list in the data pane, and open it.
4. Select the open scenario's name from the **Forecast** menu on the toolbar.
   All open scenarios appear on the menu.
5. Select **Graphs** from the ***<selected scenario name>*** menu on the toolbar.
6. In the **Objects** tree, select an activity, multi-site activity, site, business unit or enterprise.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

If you do not see any data, you might need to adjust the **Period**, **Granularity**, or **Date** controls at the top of the window to reflect those used for the forecast.

Setting the Data Display Properties and Date Range

Use these controls to customize the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Planning Period**, **Week**, or **Day**.
- **Granularity** *drop-down list*—Specify the increments (granularity) in the data display by selecting from this menu. The available choices depend on your selection in the **Period** drop-down list:
  - If you select **Year**: **Monthly**, **Weekly**, or **Daily**.
  - If you select **Month**: **Weekly** or **Daily**.
  - If you select **Planing Period**: **Weekly** or **Daily**.
  - If you select **Week**: **15** (minutes), **30** (minutes), **60** (minutes), **Daily**.

    - If you select **Day**: **15** (minutes), **30** (minutes), or **60** (minutes).

- **Show Statistics** *drop-down list*—Specifies what data is displayed in the graph and table. Select from these choices: **Interaction Volume**, **AHT**, **Interaction Volume and AHT**, **Calculated Staffing**, **Required Staffing**, **Calculated and Required Staffing**, **Calculated and multi-skill calculated staffing**. Columns in the table are displayed accordingly to the selected statistic.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Scenario Forecast's** date range.

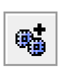
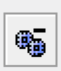
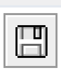
Reading the Graph and Legend

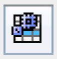
The graph shows the statistics, dates, period, and granularity that you select. The vertical axis indicates the units shown. If you display multiple statistics, the right and left vertical axes display different units for the two statistics, when necessary.

The **Legend**, at the bottom, identifies the colors that the graph uses to represent particular statistics, events, or historical data. The **Legend** changes depending on the statistics that you select. Special events appear as markers on the graph.

Modifying and Managing Scenario Data

You can use the following buttons on the **Actions** toolbar (the same commands also appear on the **Actions** menu):

Icon	Name	Description
	**Publish**	Opens the Publish Forecast Wizard, where you can publish a forecast directly to the master schedule.
	**Add activity**	Opens the Add Activity window, where you can add activities to this forecast scenario.
	**Remove activity**	Opens the Remove Activity window, where you can remove activities from this forecast scenario.
	**Save**	Saves your changes to this forecast scenario.
	**Comments**	Opens the Comments window, where you can enter comments for each day of the forecast.
	**Close**	Closes a selected open scenario, prompting you to save any unsaved changes.

Icon	Name	Description
	**Use multi-site activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a **multi-site activity**, **business unit**, or **enterprise** in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Options**	Opens the **Options** dialog box, where you can further customize the graph.

Load Forecast Template Window

Use the **Load Forecast Template** window to select a forecast template. This window opens when you:

- Select **Use Templates** and click the **Load Templates** button in these Staffing Build Wizard screens: Provide Budgeting and Overhead Data, Specify Service Level Objectives, and Staffing Requirements. The window title includes the template type; for example, **Load Indirectly Occupied Time % Forecast Templates**.
- Select Template Based and click **Next** in the Volumes Build Wizard.

The template's type, and its associated activity, match your selections in the previous view or window.

To use this window:

1. Select a template in the list of available **Templates** at the upper left.
   The list shows each source template's name and, for overlap templates, its date range.
2. Select a **Start date** and **End date** at the lower left, using the date-selection controls.
   The date range that you can specify depends on the context from which you opened this window. For non-overlap templates, you cannot select dates outside the selected template's date range, and you cannot apply templates with overlapping date ranges.
3. Select the check boxes (at the lower left) beside any weekday to which you want to apply this template.

> **Tip**
> This does not apply to overlap templates.

4. Click **>>>** to apply the template.
   The template moves into the **Applied Templates** list at the upper right. That list shows your date and weekday selections, where applicable.
5. Repeat the preceding steps for any additional templates that you want to apply.
6. Click **<<<** if you want to remove any of your selections from the **Applied Templates** list.
7. Click **OK** to load the templates that you have applied.
   You are returned to the window from which you opened the **Load Forecast Template** window.

Add Activity Window

Use the **Add Activity** window to change the activities that are associated with the current forecast scenario:

1. Select the check box next to any activity that you want to include.
   You can select from multiple sites.
2. Click **OK**.
   The previous view reappears. Its displayed data changes to match your selections.

Remove Activity Window

Use the **Remove Activity** window to change the activities associated with the current forecast scenario:

1. Clear the check box next to any activity that you want to remove.
   You can clear activities from multiple sites.
2. Click **OK**.
   The previous view reappears. Its displayed data changes to match your selections.

Add Comments to a Forecast

Use the **Comments** window to add comments to a forecast scenario. For example, you might want to add a comment after making manual changes to a scenario, so that you can keep a record of the changes.

You can add comments only for an activity, not for a site. A **Forecast scenario** activity can have numerous comments, including a new comment for each day.

See the following sections:

- Adding comments to a forecast scenario.
- Editing existing comments.
- Deleting existing comments.

Adding Comments to a Forecast Scenario

1. Click the **Comments** button on the **Forecast Scenario View** toolbar.
2. In the **Comments** window that appears, click **New** at the upper right.
   The lower panel's label changes to **New comment**.
3. Adjust the **Comment** date, using the date-selection controls.
   By default, the start date of the forecast appears.

   > **Tip**
   > You cannot select a date outside the forecast scenario's date range. If you try to make more than one comment per date, an error message alerts you to either select a different date or edit (or delete) that date's existing comment.

4. Type your comments into the large text box at the bottom left.
5. Click **Apply** to add your comment to the upper list, or **Cancel** to discard it.
6. Make any other changes that you want to make in this window and then do one of the following:
   - Click **Save** to save all of your changes and close the **Comments** window.
   - Click **Close** to discard all of your changes and close the **Comments** window.

   The previous forecast scenario view reappears. Your new comments are now attached to the scenario.

Editing Existing Comments

1. Click the **Comments** button on the **Forecast Scenario View** toolbar.
   The **Comments** window appears. The upper section of the window lists previously entered comments.
2. Click an existing comment to select it.
   The comment's text appears in the large text box at the bottom left.
3. Click **Edit**.
4. Edit the comment text in the large text box.
5. Click **Apply** to save your edits, or **Cancel** to discard them.
6. Make any other changes that you want to make in this window, then do one of the following:
   - Click **Save** to save all of your changes and close the **Comments** window.
   - Click **Close** to discard all of your changes and close the **Comments** window.

   The previous forecast scenario view reappears.

Deleting Existing Comments

1. Click the **Comments** button on the **Forecast Scenario View** toolbar.
   The **Comments** window appears. The upper section of the window lists previously entered comments.
2. Click an existing comment to select it.
   The comment's text appears in the large text box at the bottom left.
3. Click **Delete**.

   > **Important**
   > The comment is deleted immediately. There is no confirmation prompt.

4. Make any other changes that you want to make in this window; then do one of the following:
   - Click **Save** to save all of your changes and close the **Comments** window.
   - Click **Close** to discard all of your changes and close the **Comments** window.

   The previous forecast scenario view reappears.

Forecast Scenario Overheads View

Use the **Overheads** view to see the overhead data, which WFM uses to forecast shrinkage while scheduling. See the toolbar image here and the button descriptions below.

You can perform the following functions:

- View totals
- Edit pre-defined overheads (both planned and unplanned)
- Add, edit and delete overheads associated with the current **Schedule State Group** for specific activity.

Multi-site activities use overhead information that is associated with **Schedule State Groups**, from child activities (except for planned and unplanned overheads, which are separate for local and multi-site activities).

Setting the Grid Properties and Date Range

Use the following options in the **Grid** properties and **Date range** panes (near the top) to customize the grid:

- The grid displays data for a period of a year, a month, the planning period, or a week. To change the period, click **Year**, **Month**, **Planning Period**, or **Week** on the **Period** drop-down list to change the time range that is shown on each row. (WFM Web prompts you to save any unsaved edits before it refreshes the display.)
- If you select **Week**, you can further adjust each row's time range by selecting a **Granularity** of **15**, **30**, or **60** minutes.
- Use the standard date-selection controls to jump to a different week within the forecast scenario's date range.

The Overhead Menu

The **Overhead** drop-down menu displays a list of the following overheads:

Grand Total	A read-only statistic; the aggregate overhead for the selected target.
Total Planned	A read-only statistic; the aggregate planned overhead for the selected target.
Total Unplanned	A read-only statistic; the aggregate unplanned overhead for the selected target.

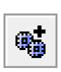
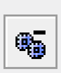
Planned	Displays planned overhead values that are not associated with any **Schedule State Group**. (In **Scenario Overheads** only, not in **Master Schedule Overheads**.)
Unplanned	Displays unplanned overhead values that are not associated with any **Schedule State Group**. (In **Scenario Overheads** only, not in **Master Schedule Overheads**.)
Schedule State Group <*name*>	Displays overhead values that are associated with this named **Schedule State Group** and the target. If the target is a multi-site activity, the **Schedule State Group** name is prefixed with the activity name. Tip Not available in **Master Schedule Overheads**.

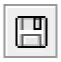
Important

- Statistics appear in the **Overhead** menu for the item that is selected in the **Object** pane. If the item is an activity, then the menu lists all **Schedule State Group** overheads that are associated with the activity. If the item is a multi-site activity, the menu lists all **Schedule State Group** overheads that are associated with its child activities.
- You can edit the **Overhead** values for activities or multi-site activities.

Managing Scenario Overhead Data

You can use the following buttons on the **Actions** toolbar (these commands also appear on the **Actions** menu):

Icon	Name	Description
	**Publish**	Opens the Publish Forecast Wizard, where you can publish a forecast directly to the master schedule.
	**Add activity**	Opens the Add Activity window, where you can add activities to this forecast scenario.
	**Remove activity**	Opens the Remove Activity window, where you can remove activities from this forecast scenario.

Icon	Name	Description
	**Save**	Saves your changes to this forecast scenario.
	**Comments**	Opens the Comments window, where you can enter comments for each day of the forecast.
	**Close**	Closes this scenario, prompting you to save any unsaved changes.
	**Add Overhead**	Starts the Add Overhead Wizard, which you can use to add overhead values to be associated with the **Schedule State Group** (SSG) and the target.
	**Delete Overhead**	Deletes overhead values that are associated with the SSG and selected in the **Overhead** drop-down menu. The SSG is removed from the **Overhead** menu, after you confirm.
	**Apply Template**	Applies templates for the overhead that is selected in the **Overhead** drop-down menu. Tip This button is disabled if one of the read-only choices (Grand Total, Total Planned, Total Unplanned) is selected in the drop-down menu.

Add Overhead Wizard

The **Add Overhead Wizard** contains the following pages:

Select Activity Page

This page appears only if the selected target in the **Overheads** view is a multi-site activity.

1. Select an activity (in the list, each is followed by its site name in parentheses).
2. Click **Next**.

Select Schedule State Group Page

Use this page to select a **Schedule State Group** (SSG) from the drop-down list of SSGs that...

- ...belong to the same site as the local activity that was selected in the **Object** tree or in the **Overheads** view if a multi-site activity was selected.
- ...are configured as overhead-related.

Set Initial Value Page

Use this page to specify initial overhead values. Select one of the following radio buttons:

- **Initial value**—Select, then use the edit control to specify a value for each time step (must be `0` or more, and less than `100%`).
- **Use template**—Select, then click the **Load Templates** button to use a dialog to select the overhead template to be applied.

Publish/Extract Forecasts

Use the **Publish Forecast Wizard** to transfer unpublished forecast scenarios to the Workforce Management database's Master Forecast, or to extract Master Forecast information to forecast scenarios.

The following sections cover:

- Publishing to the Workforce Management Database.
- Extracting from the Workforce Management Database.

Why Publish Forecasts?

- Publishing a forecast to the Workforce Management database means that the forecast is final. Schedules for a particular date range are based on the published (**Master**) forecast for those dates.
- Until a forecast is published, you cannot calculate certain performance data.

Publishing to the Workforce Management Database

This is Video 4 in a 4-video series. You can watch Video 3 here.

Link to video

To publish a forecast:

1. In the **Forecast Scenarios** view's Scenarios Table, select the scenario that you want to publish. Then click the **Publish** button on the toolbar.
   The Publish Forecast Wizard's Select Action screen appears.
2. Select **Publish to Master Forecast**, and then click **Next**.
   The Publish to Master Forecast screen appears.
3. In the **Source Dates** section, use the date-selection controls to select the **Start date** and **End date**.
4. In the **Target Dates** section, use the date-selection controls to select the **Start date** and **End date**.
5. In the **Activities** list, select which activities you want to publish to the **Master Forecast**.
   The tree shows all activities for which the selected scenario contains data. Expand business units to display their sites and expand sites to display their activities.
   You can select multiple activities from different sites.
6. Click **Finish**.

Defining Start and End Dates when Publishing

You must understand what is defined by the start and end dates in each section in the procedure above:

- In the **Source Dates** section—The start and end date values define the date range of information you want to publish information from the selected scenario. By default, the selected scenario's own start and end dates appear in these text boxes. You cannot select dates outside the original scenario dates.
  The scenario and target start dates occur on the same day of the week.
- In the **Target Dates** section—The start and end date values define the date range for which you want to update information in the **Master Forecast**. By default, these fields' entries match those in the **Source Dates** section. Data from a specific weekday is copied only to the same weekday. That is, forecast information for a **Monday** is copied to one or more **Mondays**, depending on the target date range that you select. The **Monday** data is not copied to every day within the target date range.

Extracting a Forecast from the Workforce Management Database

To transfer data from the **Master Forecast** into a forecast scenario:

1. In the **Forecast Scenarios** view's Scenarios Table, select the scenario to which you want to extract the data. Then click the **Publish** button on the toolbar.
   The Publish Forecast Wizard's Select Action screen appears.
2. Select **Extract from Master Forecast**, and then click **Next**.
   The Extract from Master Forecast window appears.
3. In the **Source Dates** section, use the date-selection controls to select the **Start date** and **End date**.
4. In the **Target Dates** section, use the date-selection controls to select the **Start date** and **End date**.
5. In the **Activities** list, select which activities you want to extract to the target scenario.
   The tree shows all activities for which the Master Forecast scenario contains data. Expand business units to display their sites and sites to display their activities.
   You can select multiple activities from different sites.
6. Click **Finish**.

Defining Start and End Dates when Extracting

You must understand what is defined by the start and end dates in each section in the procedure above:

- In the **Source Dates** section—The start and end date values define the date range for which you want to extract information from the **Master Forecast**. By default, these values match those in the **Target Dates** section.
- In the **Target Dates** section—The start and end date values define the date range for which you want to update the information in the selected target scenario. By default, the scenario's own start and end dates appear in the text boxes. For an existing scenario, you cannot select dates outside the scenario's original date range.

Graph View Options

Tip

Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Forecasts" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

Use the **Options** dialog box to customize the display of the Scenario Graphs view, the Master Forecast Graphs view, or the Historical Data Graphs view.

To use this feature:

1. Select a statistic from the **Show Statistics** drop-down list.
2. Click the **Options** button on the toolbar.
   The contents of the **Options** dialog box changes depending on the statistic that you selected.

The table below shows the statistics and the Help topic that explains the corresponding **Options** dialog box.

Important

The **Options** dialog box for the three Staffing statistics (**Calculated Staffing**, **Required Staffing**, and **Calculated and Required Staffing**) are the same, so a single topic, Graphs Filters (Staffing), covers all three.

- Click the link for a **Help** topic listed in the table. This takes you to an explanation of the options available for that statistic in the **Options** dialog box.

Interaction Volume	Graph View Options (IV)
AHT	Graph View Options (AHT)
Interaction Volume and AHT (not available in the Historical Data Graphs view)	Graph View Options (IV and AHT)
Required Staffing (not available in the Historical Data Graphs view)	Graph View Options (Staffing)
Calculated Staffing (not available in the Historical Data Graphs view)	Graph View Options (Staffing)
Calculated and Required Staffing (not available in the Historical Data Graphs view)	Graph View Options (Staffing)
Calculated and Multi-skilled Calculated Staffing (not available in the Historical Data Graphs view)	Graph View Options (Staffing)

Graph View Options (IV)

Use the **Options** dialog box to customize a **Forecast Graphs** view whose **Show Statistics** drop-down list is set to **Interaction Volume** (IV):

1. Click the **Options** button on the **Graphs** view toolbar.
   The **Options** dialog box opens.
2. Select the check boxes for the options that you want to have displayed in the graphs.
3. Clear the check boxes for those that you want to be hidden.
   You can select or clear any number of the check boxes. See the option descriptions below.
4. Click **Apply**.
   The **Graphs** view is redrawn to match your selections.

Forecast Graphs Display Options

Show Special Events—When selected, graphs display a marker that represents the start of each event’s impact.

Show Historical Data—When selected, graphs display historical data. Check boxes appear for the following:

- **This Year**
- **1 Year Ago**
- **2 Years Ago**
- **3 Years Ago**
- **4 Years Ago**
- **5 Years Ago**

You can independently show or hide the display of multiple prior years' data. Each year's data appears in a different color.

The **Legend** identifies what each color represents.

Graph View Options (AHT)

Use the **Options** window to customize a **Forecast Graphs** view whose **Show Statistics** drop-down list is set to AHT (average handling time):

1. Click the **Options** button on the **Graphs** view toolbar.
   The **Options** window appears.
2. Select the check boxes for the options that you want to have displayed in the graphs.
3. Clear the check boxes for those that you want to be hidden.
   You can select or clear any number of the check boxes. See the option descriptions below.
4. Click **Apply**.
   The Graphs view is redrawn to match your selections.

Forecast Graphs Display Options

Show Special Events—When selected, graphs display a marker that represents the start of each event's impact.

Show Weighted AHT—When selected, graphs use weighted AHT data rather than a simple average of AHT data.

Show Historical Data—When selected, graphs display historical data. Check boxes appear for the following:

- **This Year**
- **1 Year Ago**
- **2 Years Ago**
- **3 Years Ago**
- **4 Years Ago**
- **5 Years Ago**

You can independently show or hide the display of multiple prior years' data. Each year's data appears in a different color.

The **Legend** identifies what each color represents.

Graphs View Options (IV and AHT)

Use the **Options** dialog box to customize a **Forecast Graphs** view whose **Show Statistics** drop-down list is set to **Interaction Volume and AHT** (average handling time):

1. Click the **Options** button on the **Graphs** view toolbar.
   The **Options** dialog appears.
2. Select the check box if you want the option to be displayed in the graphs.
3. Clear the check box if you want the option to be hidden.
   See the option description below.
4. Click **Apply**.
   The **Graphs** view is redrawn to match your selection.

Forecast Graphs Display Option

Show Special Events—When selected, graphs display a marker that represents the start of each event’s impact.

Graph View Options (Staffing)

Use the **Options** dialog box to customize a **Forecast Graphs** view whose **Show Statistics** drop-down list is set to one of the following:

- **Calculated Staffing**
- **Required Staffing**
- **Calculated and Required Staffing**
- **Calculated and Multi-skill Calculated Staffing**

> **Important**
>
> An Explanation and Caution:
>
> **Multi-Skilled Calculated Staffing** takes into account how many agents with multiple skills could be available to work on an activity, and how the occupancy of an average agent would be divided among this activity and the other activities in his or her skill set.
>
> **Multi-Skilled Calculated Staffing** is available only if the **Multi-Skilled Forecasting** option is configured. See Overview in the *Workforce Management Administrator's Guide* for a discussion of multi-skilled forecasting and a description of how to enable multi-skill support.
>
> However, if the **Multi-Skill** option is not configured, then you will still see **Multi-Skilled Equivalents** in the graphical view, but they will be the same as **Calculated Staffing in Single-Skill Equivalents**.

Opening the Options Dialog Box

1. Click the **Options** button on the **Graphs** view toolbar.
   The **Options** dialog box opens.
2. Select the **Show Special Events** check box if you want to have that option displayed in the graphs.
3. Clear the check box if you want that option to be hidden.
   See the option descriptions below.
4. Click **Apply**.
   The **Graphs** view is redrawn to match your selections.

Forecast Graphs Display Options

Show Special Events—When selected, graphs display a marker that represents the start of each event’s impact. This option appears only if the selected activity is immediate.

Show Secondary Graph—If you select a radio button other than **None** in this pane, graphs include an additional line that shows values for one additional statistic. The secondary line is superimposed in a different color (which is identified in the **Legend**).

Choose a secondary statistic by selecting only one of the following radio buttons:

- **None**—No secondary graph.
- **Service Level Objective**—The requirement for the service level as defined when creating the forecast.
- **Service Level**—The forecast service level. (Appears only if the selected activity is immediate [not deferred].)
- **Service Level Required**—The requirement for forecast service level as defined when creating the forecast. (Appears only if the selected activity is immediate [not deferred].)
- **Deferred Service Level**—The deferred forecast service level. (Appears only if the selected activity is deferred.)
- **Deferred Service Level Required**—The requirement for deferred forecast service level as defined when creating the forecast. (Appears only if the selected activity is deferred.)
- **Forecasted Calculated Queue**—The forecast queue, calculated using Staffing Calculated values. (Appears only if the selected activity is deferred.)
- **Forecasted Required Queue**—The forecast queue, calculated using Staffing Required values. (Appears only if the selected activity is deferred.)
- **Avg Speed of Answer Objective**—The requirement for Average Speed of Answer (ASA) as defined when creating the forecast.
- **Avg Speed of Answer**—The forecast Average Speed of Answer (ASA).
- **Avg Speed of Answer Required**—The requirement for Average Speed of Answer (ASA) as defined when creating the forecast.
- **% of Abandons Objective**—The requirement for the percentage of interactions abandoned, as defined when creating the forecast.
- **% of Abandons**—The forecast percentage of interactions abandoned.
- **% of Abandons Required**—The requirement for the percentage of interactions abandoned as defined when creating the forecast.
- **Maximum Occupancy Objective**—The requirement for the maximum time that a logged-in agent should be handling interactions, as defined when creating the forecast.
- **Maximum Occupancy**—The forecast maximum time that a logged-in agent will be handling interactions.
- **Maximum Occupancy Required**—The requirement for the maximum time that a logged-in agent will be handling interactions as defined when creating the forecast.
- **Estimated Budget**—The estimated budget based on a full-time working day and hourly rate.
- **Hiring Plan**—The total number of people, including non-working (on vacation) agents, who are needed to handle the forecast interaction volume.
- **Agent Hours**—The number of agent hours that are needed to handle the interaction volume.

Important

If you selected **Use multi-site activity** for any target in the object tree, **Estimated Budget**, **Hiring Plan**, and **Agent Hours** are omitted from this list of secondary statistics. If you selected **fixed-staff activities**, you will see *only* these three statistics displayed as radio buttons.

Changing the Staffing Totals Display from FTE to Man Hours

When **Calculated and Required Staffing** is selected in the Show Statistics drop-down list , you can switch between FTE and man-hours mode in the Graph view by adjusting the view settings in the interface.

To switch display modes:

1. At the top of the **Graph** view, above the list of modules, click **About** in the grey **Home** toolbar 

.
2. In the WFM Web **About** dialog, click **Settings...**
3. In the **Settings...** list, scroll down to the FRC_STAFFING_USE_MANHOURS option and, in the **Value** column, enter a check mark in the boolean check box.
4. To edit the selected string in the list, click it twice.

Forecast Templates

> **Tip**
>
> Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Templates" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

Forecast templates help you create forecasts for sites or business units that have little or no historical data. In addition, there are other uses for templates. For example, you can create templates for service objectives, such as Average Speed of Answer, and Service Level. In those cases, forecast templates are used to apply different values for different periods of the day, instead of using a single value for the whole day.

Use WFM Web's forecast templates features to:

Select and manage forecast templates:	See Forecast Templates List View.
Edit template values:	See Template Properties: Data Tab.
View template values in a graph:	See Template Properties: Graph Tab.
Add or remove activities within a template:	See Template Properties: Activities Tab.
Create a new template:	See New Forecast Template Window. **Tip** You can copy and paste data between a grid and a spreadsheet. For example, you can copy and paste from a Scenario Volumes view or Scenario Staffing view.
Create a new template from existing data:	See Save as Template Window.

Forecast Templates List View

Use the **Forecast Templates List** view to create, edit, and delete forecast templates.

You use these templates to create forecasts for sites or business units that have little or no historical data. In addition, there are other uses for templates. For example, you can create templates for service objectives, such as Average Speed of Answer, and Service Level. In those cases, forecast templates are used to apply different values for different periods of the day, instead of using a single value for the whole day.

The following sections cover:

- Displaying the Forecast Templates List view
- Using the Templates table
- Creating, editing, or deleting templates

Displaying the Forecast Templates List View

1. In the **Modules** tree, click **Forecast > Templates** to activate the **Templates List View**.
2. In the **Objects** tree, select a business unit, site, or template. Business units and sites expand to display their templates.
   - If you selected a business unit or site, the table on the right-hand pane shows the templates that correspond to your selection.
   - If you selected a template, the template properties appear in the **Data** tab.

See Template Properties: Data, Template Properties: Activities, and Template Properties: Graph for information on the three template properties tabs.

Using the Templates Table

The **Templates** table shows each template's name, type, associated site, and date range.

To filter the table so that it shows more or fewer templates:

- Select or clear check boxes in the **Show Template Types** pane at the top.

To select a template for editing or deletion:

- Click the template's row in the table.

Creating, Editing, or Deleting Templates

You can use the following buttons on the **Actions** toolbar (these commands also appear in the **Actions** menu):

New	Opens the New Forecast Template dialog box.
Edit	Opens the Forecast Template Properties view for the selected template.
Delete	Deletes the selected template after first displaying a dialog box asking you to confirm your choice.

Template Properties: Data Tab

Use the **Template Properties** view's **Data** tab to edit a forecast template's values in a table format.

The boxes at the top of the tab contain the template's name, associated site, business unit, type, and total or average value. The table lists timesteps and corresponding values for the template's activities.

To edit values:

1. Select the value in the right column, and replace it with the value that you want.
2. Repeat this for other timesteps that you want to change.
   You can use the vertical scroll bar on the right to display more timesteps.
3. Click **Save** to save your changes to the template.

Template Properties: Graph Tab

Use the **Template Properties** view's **Graph** tab to view a forecast template's values in a graphical format.

To adjust the graph's displayed time interval, use the **Display Date** drop-down list.

- If you select **Whole Period**, the graph's horizontal axis indicates:
    - Days of the week, for non-overlap templates.
    - All dates in the template, for overlap templates.
- If you select an individual weekday (for non-overlap templates) or a specific date (for overlap templates), the horizontal axis indicates timesteps.

The graph's vertical axis identifies the values shown in the graph.

Template Properties: Activities Tab

Use the **Template Properties** view's **Activities** tab to modify the activities associated with a forecast template:

1. Select the check boxes beside the activities that you want to associate with the template.
2. Clear the check boxes beside the activities that you want to remove from the template.
   The check boxes show activities belonging to the business unit or site with which the template is associated.
3. Use the vertical scroll bar on the right to display more activities.
4. Click **Save** to save your changes to the template's activities.

New Forecast Template Dialog

Use the **New Forecast Template** dialog box to create a new template, but first watch the video.

Link to video

To create a template:

1. Click **New** in the Forecast Templates List view toolbar
   The New Forecast Template dialog box opens.
2. Enter a **Name** for the template.
3. In the **Associated** drop-down list, select the site for which you are building this template.
4. Click the **Type** drop-down list to select the template type.
   See a list of template types below.
5. Select a template from the **Based On** drop-down list If you want to use settings from a previously configured template.
6. Enter a number for the Initial Value.
7. If you are creating an overlap template, enter the **Start** and **End dates**.
8. Select the **Activities** that you want to be associated with this template.
   Selecting activities enables you to control which templates are used when forecasting for specific activities.
9. Click **OK**.
   The forecast template is now available in the Forecast Templates List view.

What Does the Intial Value Represent?

The initial value you enter in step 6 of the procedure is a minimum value that applies to all timesteps. After you have created the template, edit it to adjust the precise values for each timestep. WFM Web interprets the initial value differently, depending on the type of template. For example, if you are creating an **Interaction Volume** template, the initial value might be 8 (calls per timestep). See Template Properties: Data for details.

Forecast Template Types

- **Interaction Volume**—Number of interactions per timestep. When you save historical IV or AHT for a multi-site activity as a template, only multi-site activity data are saved, never the sum of underlying activities.
- **Average Handle Time**—In seconds. See note above.

- **Service Level Percentage**—As a percentage. See Special Note at end of this topic.
- **Overheads**—As a percentage. See Special Note.
- **Indirectly Occupied Time**—As a percentage. See Special Note.
- **Maximum Occupancy**—As a percentage.
- **Interaction Volume Overlap**—Number of interactions per timestep.
- **Average Handle Time Overlap**—In seconds.
- **Staffing**—Number of agents (full-time equivalents) to be scheduled for each timestep. This can be either calculated by WFM (**Calculated Staffing**) or set by the user (**Required Staffing**), or you can use both **Calculated** and **Required** values in a forecast. See Special Note.
- **Average Speed of Answer**—In seconds. See Special Note.

Special Note

You can create these templates at the business unit level and apply them when building a multi-site activity staffing forecast.

Save as Template Dialog

Use the **Save As Template** dialog box to create a new forecast template from existing data. You can open this dialog box from:

- Historical Data Volumes View
- Master Forecast Staffing View
- Scenario Staffing View

To complete the dialog box:

1. Enter a name for the new template into the **Name** field.
2. Select the site to which you want this template associated from the **Associated** drop-down list.
3. Select the template type from the **Type** drop-down list.
   The **Based on** drop-down list and the **Initial Value** text box are disabled. You cannot alter their default entries.
4. Select or enter the **Start date** and **End date** into the corresponding fields in the **Source Dates** area.

> ## Important
> For regular (non-overlap) templates, the date range must be one week. If you enter a different date range, WFM Web automatically adjusts it to one week. **Overlap** templates, which fill in gaps in historical data, have specified start and end dates.

5. Select or enter the **Start date** and **End date** into the corresponding fields in the **Target Dates** area.
   You can select **Target Dates** that are different from **Source Dates** for these template types: **IV Overlap**, and **AHT Overlap**.
6. Select the **Activities** that you want to be associated with this template.
7. Click **OK**.
   The new forecast template now appears in the Forecast Templates List view.

Overlays

> **Tip**
>
> Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Overlays" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

You can create and configure overlays in the **Forecast** module of WFM Web for Supervisors. Overlays perform the function of factors, and help you track events that might affect interaction volume. For example, use an overlay to include in your forecast the anticipated effect of a sales promotion or a marketing campaign.

See also Overlays Primer.

Getting Started

Prerequisite: You must have the security permission **Overlays** before you can create or configure overlays or access the action **Find Events** in the **Historical Data Volumes View**. It is assignable in **Configuration > Roles > Role Privileges > Forecast Role Privileges**.

To use overlays, open the **Forecast** module in the **Modules** pane and select **Overlays**. You can then see a hierarchy of business units (BUs), sites and overlays on the **Object** pane below.

To manage the list of **Overlays**, select a BU or a site in the **Objects** pane.

To edit an overlay, select it in the **Objects** pane and make changes in the **Data** pane.

Managing the List of Overlays

You can use toolbar icons or Actions menu commands to manage the overlays:

1. Select a **BU** or **Site** on the **Object** pane.
   A table in the Data pane lists all current overlays.
2. Click an overlay to select its entire row.
3. Select a command from the **Actions** menu, or an icon from the toolbar:

Toolbar controls

Icon	Name	Description
	**New**	Start the New Overlay wizard.
	**Edit**	Edit the selected overlay.
	**Delete**	Delete the selected overlay.

Data Pane Controls

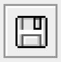
The grid displays all overlays that belong to the selected BU or Site. The grid contains these columns:

Overlay	Name of the selected overlay.
Spread	The time period over which the overlay is spread; in days or hours.
Type	Possible values (Impacting or Redistributing) indicate how the selected overlay will affect forecast values. You can change this in the Properties tab by selecting a type: • **Calculate Using Specified Initial** and **Ending Impact** (select to specify Impacting) • **Always Use Entered Distribution** or **Always Calculate Disregarding Impacts and Distribution** (to specify Redistributing)
Usage	For each overlay, this column lists the **Properties** tab choice for type (see above).

Editing an Overlay

To edit an overlay:

1. Select **Overlay** in the module pane.
2. Select a **BU** or **Site** in the object area.
3. Select an overlay by one of these methods:
   - Select an overlay in the object area in the object area (beneath the selected **BU** or **Site**).
   - Select an overlay in the data area and click **Edit**  .
   - Double-click an overlay in the data area.
4. Select a command from the **Actions** menu, or an icon from the toolbar:
   - Edit **Overlay** controls:

Icon	Name	Description
	**Save**	Save all changes made to overlay.
	**Calculate distribution**	Start the Calculate Distribution Wizard, which calculates the distribution of the selected overlay. This action is enabled only if the option Always Use Entered Distribution is selected.

— **OR** —

- Select a tab:

Properties *tab*	View and change the main properties of the selected overlay.
Distribution *tab*	View and change the distribution method of the selected overlay. Enabled in the Properties tab by selecting the type Always Use Entered Distribution.
Impacted Activities *tab*	View and change activities which are impacted by the selected overlay.
Events *tab*	View and change events which are related to the selected overlay.

Properties Tab Elements

Name *field*	You can edit the selected **Overlay's** name in this field.
This overlay is *label*	• **Impacting Forecast Values and Totals**—Specify that this overlay can impact the forecast by changing forecast’s values and totals. This option is the default. • **Redistributing Forecast Without Changing Total**—Specify that this overlay must preserve a forecast’s total for specific period even while changing the distribution of values inside that period.
Spread Over *field*	Displays the length of time that the selected **Overlay** will occupy. Edit this field and select one of the two radio buttons **Days** or **Hours** to choose the units. The value must be greater than `0` (zero) and the default is set during creation.
While building forecast use this overlay in the following way *radio button group*	• **Calculate Using Specified Initial and**

	Ending Impact—Use the specified initial and ending impact when building a forecast. This option enables the Distribution tab and the fields Initial Impact and Ending Impact beneath that tab. • **Always Use Entered Distribution**—Use the specified (entered) distribution when building a forecast. This option enables the Distribution tab. • **Always Calculate Disregarding Impacts and Distribution**—Use this overlay, but always disregard impacts and distribution when building a forecast. This option disables the Distribution tab.
This overlay is applicable to *radio button group*	• **IV**—Specify that this overlay applies only to Interaction Volume (IV). • **AHT**—Specify that this overlay applies only to Average Handling Time (AHT).

Distribution Tab Elements

What you see depends upon choices that you made on the **Properties** page.

- This page is completely disabled if **Always Calculate Disregarding Impacts and Distribution** was selected under the **Properties** tab.
- If **Always Use Entered Distribution** was selected on the **Properties** tab:
  - **Graph**—Displays the same information as the grid below it displays, but in graphical form.
  - **Grid**—Displays and allows you to edit the overlay's distribution. Columns:
    - **Daily** or **Hourly Impact**—Each row displays an increment during which the overlay will be in effect. The actual increment (day or hour) is configured in **Spread**.
    - **Distribution Value**—Displays the distribution value of each increment. The default value in each cell is `0`.
    - If the selected overlay is of the type **impacting**, then you can enter values from `-100` to `9999` into the grid.
    - If the selected overlay is of the type **redistributing**, then you can enter values from `0` to `100` into the grid.

> **Important**
> If the total of all values in the grid does not equal **100**, you will see a warning and will not be able to save your changes to the overlay.

- If **Calculate Using The Specified Initial and Ending Impact** was selected on the **Properties** page:
  - **Initial Impact** *field*—Use this field to specify the initial impact of the overlay. Range: `0` (the default) or any positive, negative, or fractional values.
  - **Ending Impact** *field*—Use this field to specify the ending impact of the overlay. Range: `0` (the default) or any positive, negative, or fractional values.

Impacted Activities Tab

(Also a page in the New Overlay wizard.)

This tab lists all activities that correspond to the **Factor** that is selected in the **Object** tree.

- Select the check box to the left of each activity in the list, to specify which activities will be impacted by the selected factor.
- Clear the check box to specify no impact.

Events Tab Elements

The grid on this tab lists all **Events** in the selected **Overlay**, one per row. The value in every cell of this grid is editable. The columns are:

Name	Edit the **Event** name in this cell.
Start Date	Edit the start date.
Start Time	Edit the start time.
Strength	Edit the strength of the event. The range is any positive value (greater than zero), up to nine digits and two decimals.
Disregard Historical Data	Select this check box if the event should disregard historical data. Clear the check box to consider historical data.

Events Controls

Add Event	Click to add a new row to the grid, with default values in the cells.
Delete Event	Click to delete the selected event from the grid.
Cancel or **Save**	Click to perform those functions.

Overlays Primer

In WFM, each event in an overlay represents an abnormality in historical data or in the future—that is, a fluctuation in Interaction Volume (IV) or Average Handling Time (AHT) that is not one of the usual seasonal, intra-week, or intra-day trends. If these events point to the same kind of abnormality, one that has happened multiple times in the past or can happen in the future, then overlay events can be arranged into overlay groups that are simply called *overlays*. The most common overlay examples are advertising campaigns and catalog drops.

An overlay impacts prediction data directly, when the event in a particular overlay is situated over a prediction interval.

Overlay Types

There are two types of overlay, defined by how WFM calculates their impact on prediction data:

1. A **Multiplicative Overlay** increases or decreases every step of predictive data by a specific percentage. That percentage is the overlay's impact distribution, multiplied by event strength. The total of the interval is affected.

   This type of overlay was called a factor before release 7.6.1. Each step (daily or hourly) of predictive data that is covered by the overlay is adjusted by a certain percentage and multiplied by event strength.
2. An **Overriding Overlay** redistributes the volume of an event interval. The total of the interval does not change. The volume may be moved from one event-step to another.

   This type of overlay was introduced in version 7.6.1, when factor was renamed multiplicative overlay. It is designed to keep the predicted total of the affected period and, instead, adjust the distribution of the volumes within that period. The events of this overlay type are applied as the last step of prediction. The seasonal components (intra-day, daily, and yearly) and multiplicative overlays are applied before overriding overlays are calculated.

   The overriding overlay distributes the volumes according to the weight (or the percentage) of each event-step (daily or hourly). It adjusts the volume of each event-step, so that the event-step receives its part of the total of the whole event period according to its weight.

   For example, an overriding overlay has three event-steps with respective weights of `20`, `30`, and `50`. If the predicted total of the entire interval is `1,000`, then the first event-step will get `200`, the second `300`, and the last `500`. Note that the initially predicted total of the event-step is not taken into account while calculating an impact of this overlay type. The weight of an event-step that is determined by the overlay itself, as well as the predicted total of the whole interval that is affected by the event, are taken into account.

   When the event-step (daily or hourly) is calculated, its total is distributed to 15-minute timesteps proportionally, to a volume of each time step before the event was applied. So, the intra-day or intra-hour pattern is preserved.

   When the event of an overriding overlay type overlaps with the other event of the same type, it cannot be calculated, even if both belong to different overlays. However, it can overlap with events of multiplicative overlays.

Distributing Event Impact

There are three ways to determine the impact of each event-step, and they apply to both overlay types:

1. **By start-end**—The impact distribution of an overlay is determined by specified start and end impact values. The impact is gradually changed by the same amount for every event-step, from the start value to the end value. For example, if the starting value is `100` and the ending value is `200`, and the overlay is daily with a length of six days, then the impact on the first day is `100`, on the second day `120`, and then `140`, `160`, `180`, and finally `200` on the sixth and final day.
2. **By keeping the whole detailed distribution**—The overlay saves the impact of each event-step separately. It can be either precalculated, entered by the user, or mixed.
3. **By calculating every time during the prediction (*always calculated*)**—The impact of the overlay is always calculated during the prediction. For successful calculation, the historical period should include one or more events that are in the same overlay. The impact of the overlay is determined by the prediction algorithm, according to historical data, and then used in prediction.

Ignoring Historical Data

Any event under an overlay type may have the **Ignore Historical Data** flag set, which specifies whether the historical-data interval data that is covered by that event is used in calculations of volume prediction or overlay impact (see Calculating Overlay Impact).

If an event does not have the **Ignore Historical Data** flag set, then the data that is covered by the event is considered for prediction.

There is no additional processing of historical data that is affected by the event, other than ignoring it or using it.

Calculating Overlay Impact

The impact of an overlay can be determined by analyzing historical data and is done by prediction algorithm. The algorithm analyzes the period of historical data, which contains one or more events of overlay that are to be calculated.

Overlays can be precalculated before starting volume forecasting or during volume forecasting (see Distributing Event Impact). Given the same historical data and using the same method, the results should be identical.

Multiplicative overlays are calculated by separating the seasonal component (yearly, daily, or intra-day) from the event impact for each event of the overlay in the given historical data. Then, the impact is divided by event strength and averaged. When the impact is applied to an event on the prediction interval, it is multiplied by the strength of that event.

In **Overriding Overlays**, the percentage of each event-step in the total of the whole event period is calculated for each event, and then averaged.

For example, a historical period has two events in a daily overlay, which is 3 days long. The days of the first event are `150`, `200`, `150` (`30%`, `40%`, and `30%` of the total, respectively), and the days of the second event are `150`, `150`, `200` (`30%`, `30%`, and `40%` of the total, respectively). Each event-step (in this case, a day) is averaged individually, and the overlay is calculated as `30%`, `35%`, `35%`, respectively.

Calculate Distribution Wizard

Before using the Distribution wizard, read the Overlays Primer to understand how WFM calculates an overlay's distribution and the overlay's impact on the forecast.

Use this wizard to calculate the distribution of an Overlay.

1. Open the **Forecast** module and select **Overlays** in the modules area.
2. Select an **Overlay** in the objects area.
   Prerequisite: The Overlay property Always Use Entered Distribution must be selected.
3. Click **Calculate Distribution** ( ) or select **Calculate Distribution** from the **Action** menu.
   The **Calculate Distribution Wizard** opens, and displays the following pages:

Select Activities Page

1. Select one or more **Activities**.
2. Select or enter a **Start date** and an **End date** in the **Use Historical Data** area.
3. Optional: check **Use Overlap Templates** to enable the **Load Overlap Templates** page (see below).
4. Click **Next**.

Load Overlap Templates Page

Select the overlap templates to use when calculating distribution. This page uses the same controls as Load Forecast Overlap Templates in the **Volumes Build Wizard**.

Select Events Page

This page uses the same controls as the Select Events page in the **Volumes Build Wizard**, with some differences. The grid at the top displays a list of events in the overlay ... but only events which fall within the specified historical data date range. The grid has these columns:

Event—The event's name.

Start Date-Time—The event’s start date and time.

Enabled—Select this check box if the event should be considered for calculations.

Below the list are other controls:

1. Select the events (configured for the overlay) to be used when calculating distribution.

> ## Important
> The controls for specifying impact that appear on the Select Events page in the **Volumes Build Wizard**) are not displayed if the selected event belongs to an overlay that has one of these options specified on the Properties tab: **Always Use Entered Distribution**, **Always Calculate Disregarding Impacts and Distribution**.

2. Click the **Distribution** button to display the **Distribution** dialog, which contains the same controls and presents the same data that appear on the Distribution tab.

   The **Distribution** button is displayed if the selected event belongs to an overlay that has one of the **Always Use Entered Distribution** option specified on the Properties tab.
3. Make your selections from the **Distribution** tab controls.
4. Click **Finish**.

New Overlay Wizard

Use the **New Overlay Wizard** (NOW) to create overlays, but first watch the video.

Link to video

To create overlays:

1. Open the **Forecast** module and select **Overlays**.
2. In the **Objects** pane, select a **Business Unit** or **Site**.
3. Click **New**  or select **New** from the **Action** menu.
   The New Overlay Wizard opens and displays the following pages, in order
   - Properties
   - Usage
   - Impact
   - Impacted Activities
4. Select the appropriate controls on each page, remembering that some selections may deselect others.

NOW: Properties Page

The **New Overlay Wizard** (NOW) opens and displays these pages, in order: **Properties** (this page), Usage, Impact, and Impacted Activities. Be sure to watch the video.

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.

The settings on this page are:

Setting	Description
Name *field*	You can edit the selected **Overlay's** name in this field.
This Overlay shall: *radio buttons*	• **Impact Forecast Values and Totals**—Specify that this overlay can impact the forecast by changing forecast's values and totals. This option is the default. • **Redistribute Forecast Without Changing Total**—Specify that this overlay must preserve a forecast's total for specific period even while changing the distribution of values inside that period.
Spread Over: *field*	Displays the length of time that the selected **Overlay** will occupy. Edit this field and select one of the two radio buttons **Days** or **Hours** to choose the units. The value must be greater than `0` (zero) and the default is 1.
This Overlay is Applicable To: *radio buttons*	Select one of the two radio buttons **IV** or **AHT** to choose whether the overlay applies to **Interaction Volume** (IV) or **Average Handling Time** (AHT).

NOW: Usage Page

The **New Overlay Wizard** (NOW) opens and displays these pages, in order: Properties, **Usage** (this page), Impact, and Impacted Activities. Be sure to watch the video.

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.

The settings on this page are:

Setting	Description
While Building A Forecast use This Overlay In The Following Way: *radio button group*	• **Calculate Using The Specified Initial and Ending Impact**—Use the specified initial and ending impact when building a forecast. This options is the default. This option is missing from the display, and thus disabled, if you selected **This Overlay Shall: / Redistribute Forecast Without Changing Total** (on the Properties page). • **Always Use Entered Distribution**—Use the specified (entered) distribution when building a forecast. • **Always Calculate Disregarding Impacts and Distribution**—Use this overlay, but always disregard impacts and distribution when building a forecast.

NOW: Impact Page

The **New Overlay Wizard** (NOW) opens and displays these pages, in order: Properties, Usage, **Impact** (this page), and Impacted Activities. Be sure to watch the video.

> **Tip**
>
> This page appears only if you selected the radio button **Calculate Using The Specified Initial and Ending Impact** on the Usage page.

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.

The settings on this page are:

Setting	Description
Impact parameters of overlay *fields*	• **Initial Impact** *field*—Use this field to specify the initial impact of the overlay. Range: `0` (the default) and positive numbers. • **Ending Impact** *field*—Use this field to specify the ending impact of the overlay. Range: `0` (the default) and positive numbers. These fields are enabled only if the option **Calculate Using Specified Initial and Ending Impact** is selected.

NOW: Impacted Activities Page

The **New Overlay Wizard** (NOW) opens and displays these pages, in order: Properties, Usage, Impact, and **Impacted Activities** (this page). Be sure to watch the video.

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Finish**.

This page contains the same controls and constraints as the Impacted Activities tab—a list of **Activities**, each with its own with selectable check box.

The settings on this page are:

- Select the check box to the left of each activity in the list, to specify which activities will be impacted by the selected factor. You can also select a site's check box to automatically select all activities below it.
- Clear the check box to specify no impact.

Import

Workforce Management (WFM) collects historical data automatically. However, you can import historical data manually on a regular basis, if necessary. For example, you might have a new Genesys WFM installation and want to import previously collected historical data.

Accessing and Editing This View

Only users who have security rights to edit historical data and/or publish to Master Forecast can access the Forecast > Import view.

Format is Important

Use the same column separator in the **Import** wizard as the one used in the `.csv` file. In the **Import** wizard, this column separator is set by default and defined in the current regional settings. If you are importing `.csv` files containing data whose format is defined by a different regional setting, and the column separator in this file is different from default separator, change the column separator in the **Import** wizard to match the separator used the `.csv` file.

You can import more than one type of data to a single file.

The data files must:

- be formatted according to regional settings.
- use 15-minute, 30-minute, 60-minute, or 24-hour (daily) timesteps. (If you are importing data to the Master Forecast, use 15-minute and daily granularity only.)
- be ordered in ascending order by date.

The **Data Import** module imports the following data into WFM:

Master Forecast	Historical Data
Interaction Volume data	**Historical Interaction Volume** data
AHT data	**Historical AHT** data
Calculated Staffing data (in Man-hours or FTE)	
Required Staffing data (in Man-hours or FTE)	

Exporting Data

You can also use WFM to export Forecasts and historical data collected by WFM. Use the **Forecast** report to export data such as, Interaction Volumes or AHT forecasts, Staffing forecasts, Historical

Interaction Volumes, and Historical AHT.

When using Data Importer to export historical data, take care to observe the format of the exported files. They must be exported in `.csv` file format.

Importing Data

Use the **Import** view in the **Forecast** module to import **Historical Interaction Volume** or **Historical AHT**, **Forecast Interaction Volume**, **Forecast AHT**, and **Forecast Staffing** data.

Importing Data from a .CSV File

To import data:

1. In the **Forecast** module, click **Import**.
2. Expand the appropriate **Site** or **Business Unit** and choose the **Activity** for which you want to import data.
3. In the **Import Forecast Data** pane, click **Select File**.
4. Click **Import from file**  to select a .CSV file that contains the data you want imported.

> **Tip**
>
> When data for deferred activities is imported or exported using the 24-hours period, the data is imported for each day using open hours like this:
>
> - The day start is the previous overnight day end or 00:00, whichever is later.
> - The day end is the overnight time end or 24:00 whichever is later.

5. From the **Granularity** drop-down list, select **15**, **30**, **60**, or **Daily**.

> **Tip**
>
> WFM does not import data for the last timestep in the selected period if you select the 15-, 30-, or 60-minute timestep. For example, assume your .CSV file contains data for the dates 4/15/2005 through 6/28/2005 in 15-minute timesteps. To completely import the data from every timestep, you must set the **End Date** to 6/29/2005 and the **End Time** to 12:00 AM.
>
> When WFM imports Historical data with 24-hours granularity, it takes into account only activity or multi-site activity open hours, because the import file contains data for days only (one record per each day). Open hours acts as a filter. WFM does not use the **Start Time** and **End Time** in the **Select Dates** page of the **Import Wizard**.
>
> If the 15-, 30-, or 60-minute timestep is selected, data from the import file is filtered using the **Start Date and Time** and **End Date and Time**.

6. From the **Locale for Import** drop-down list, select the locale.

> ## Tip
> The **Granularity** parameter settings determines if the **Time** data type is offered in the **Data Columns** pane to follow. Locale settings enable the date and time types to be parsed and used in later in the import process.

7. At the top of the pane, click **Next**  .
   You can select **Back** at any time is you need to return to the previous pane.
8. In the **Select Data Columns** pane, choose the column separator, either **Character**, **Tab**, or **Space**.
   If you choose **Character**, you must enter a character in this field. For example, a comma.
9. In the **Comments** character field, enter a character that will indicate any lines in the .CSV file that represent comments.
   For example, a hash tag character.
10. In the **Column Mapping to Data** section, map the columns to the type of data you have in your .CSV file.
    The available data type columns are:
    - Date
    - Time
    - Master Forecast IV
    - Master Forecast AHT
    - Historical Data IV
    - Historical Data AHT
    - Calculated Staffing, FTE
    - Calculated Staffing, Manhours
    - Required Staffing, FTE
    - Required Staffing, Manhours

> ## Tip
> Non-historical data statistics are imported to the **Master Forecast**. Specified statistics appear only if the user has appropriate security rights.
>
> Different columns appear in the **Column Mapping to Data** section, depending on the column separator and comments character you use. To view all applicable columns in this section, ensure that you select a separator that matches the one used in your .CSV file.
>
> If you chose an incorrect data type for any column, the **Review Validation** pane opens, with an error message.

11. At the top of the pane, click **Next**  .
12. In the **Select Dates** pane, choose one of the following:
    - **Import everything**—To import all of the data in the .CSV file.
    - **Import following date and time range**—To specify the date and time ranges for the data you

want to import.

13. After choosing either a or b in step 12, select the check boxes next to any days for which you want data to be ignored.
    For example, you might use setting to omit data from days when the activity is not open.

    If a date and time range is not selected in step 12, by default the start time and date is the current day and 12:00 am and the end time and date is the following day and 12:00 am.

14. At the top of the pane, click **Import**  .
    The **Information** dialog opens, indicating the data is being uploaded and the progress.
15. Click **Cancel** to end the operation, if necessary.
16. When the **Information** dialog indicates the data upload is done, click **OK**.

Use the **Reports** module to export data and create reports. See **Forecast Report**.

Master Forecast

Tip

Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Master Forecasts" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

The views in the **Master Forecast** are:

- **Master Forecast** Volumes—Enables you to view the **Master Forecast's Interaction Volumes** and **AHT**.
- **Master Forecast** Staffing—Enables you to view the **Master Forecast's Calculated** and **Required Staffing**.
- **Master Forecast** Overheads—Enables you to view **Overhead** data, which WFM uses to forecast shrinkage while scheduling.
- **Master Forecast** Graphs—Displays your choice of statistics for the **Master Forecast**, using line charts and a table containing forecast values.

To open the views:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Master Forecast**.
3. From the **Master Forecast** menu on the toolbar, select **Volumes**, **Staffing**, **Overheads**, or **Graphs**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit** or **Enterprise**.

Master Forecast Volumes View

Use the **Volumes** view to display the **Master Forecast's Interaction Volumes** and **AHT**. See the toolbar image here the button descriptions below.

This view provides standard date-selection controls and a grid that shows statistics for days or timesteps.

Displaying the Volumes View

To display the **Volumes** view:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Master Forecast**.
3. From the **Master Forecast** menu on the toolbar, select **Volumes**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

Setting the Data Display Properties and Date Range

Use these controls to customize the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Week**, or **Planning Period**.
  If you select **Week**, you can further adjust each row's time range by selecting `15`, `30`, or `60` (minutes) from the **Granularity** drop-down list.
- **Show Statistics** *drop-down list*—Specify what data is displayed in the graph and table by selecting from these choices: **Interaction Volume**, **AHT**, **Interaction Volume and AHT**.
- **Show Columns** *check boxes*—Show (or hide) data columns in the table by selecting or clearing the **Volume**, **Volume %**, and **AHT** check boxes.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

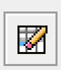
Reading the Data

The table provides columns that display the following statistics:

Week/Time Step	Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the date range and granularity that you selected above.)
[Days or Dates]	If you select the **Month** date range, each group of columns shows statistics for one full day. If you select the **Week** date range, each group of columns indicates one date, the top row shows daily totals, and each lower row shows statistics for one timestep on that date. (Timestep durations depend on the granularity that you selected above.)
IV	Shows the interaction volume forecasted for each day or timestep.
IV%	Shows this row's percentage of the day's total interaction volume.
AHT	Shows the average handling time.
Weekly Totals	If you select the **Month** date range, these columns show weekly totals, or averages, for the **IV**, **IV%**, and **AHT** statistics.

Cleanup and Calculation Options

Choose these commands from the **Actions** menu or select their icons from the toolbar:

Icon	Name	Description
	**Cleanup**	Opens the Cleanup Master Forecast window, where you can remove information from the **Master Forecast** for selected dates and activities.
	**Use Multi-Site Activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a **multi-site activity**, **Business Unit**, or **Enterprise** in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from

Icon	Name	Description
		having to click it every time you want to display data for the selected multi-site activity.

Master Forecast Staffing View

Use the **Staffing** view to display the **Master Forecast's Calculated** and **Required Staffing**. See the toolbar image here and the button descriptions below.

This view provides standard date-selection controls and a grid that shows staffing levels for days or timesteps.

Displaying the Staffing View

To display the Staffing view:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Master Forecast**.
3. From the **Master Forecast** menu on the toolbar, select **Staffing**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

Setting the Data Display Properties and Date Range

Use these controls to customize the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Week**, or **Planning Period** from the **Period** drop-down list.
  If you select **Week**, you can further adjust each row's time range by selecting `15`, `30`, or `60` (minutes) from the **Granularity** drop-down list.
- **Show Statistics** *drop-down list*—Specifies what data is displayed in the graph and table. Select from these choices: **Calculated Staffing**, **Required Staffing**, **Calculated and Required Staffing**.
- **Show Columns** *check boxes*—Show (or hide) data columns in the table by selecting or clearing the **Calc** (calculations) and **Req** (requirements) check boxes.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

Reading the Data

The table provides columns that display the following statistics:

Week/Time Step	Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the date range and granularity that you selected above.)
[Days or Dates]	If you select the **Month** date range, each group of columns shows statistics for one full day. If you select the **Week** date range, each group of columns indicates one date, the top row shows daily totals, measured in **Full Time Equivalents**. Each lower row shows statistics for one timestep on that date. (Timestep durations depend on the granularity that you selected above.)
Calc	Shows the calculated number of agents for each day (measured in Full Time Equivalents) or for each timestep (measured in single skill equivalents).
Req	Shows the required number of agents for each day (measured in Full Time Equivalents) or for each timestep (measured in single skill equivalents).
[Weekly Totals]	If you select the **Month** date range, the columns at right show weekly totals for the displayed statistics.

Save As Template, Cleanup, and Calculation Options

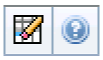
You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu):

Icon	Name	Description
	**Save As Template**	Opens the Save as Template Wizard, where you can save **Master Forecast** data as a forecast template.
	**Cleanup**	Opens the Cleanup Master Forecast window, where you can remove information from the **Master Forecast** for selected dates and activities.
	**Use Multi-Site Activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a **multi-site activity**, **Business**

Icon	Name	Description
		Unit, or **Enterprise** in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Master Forecast Overheads View

Use the **Overheads** view to view overhead data, which WFM uses to forecast shrinkage while scheduling. See the toolbar image here and the button descriptions below.



Setting the Grid Properties and Date Range

Use these options in the **Grid** properties and **Date Range** panes (near the top) to customize the grid:

- The grid displays data for a period of a year, month, week or planning period. To change the period, click **Year**, **Month**, **Week**, or **Planning Period** in the **Period** drop-down list to change the time range that is shown on each row. (WFM Web prompts you to save any unsaved edits before it refreshes the display.)
- If you select **Week**, you can further adjust each row's time range by selecting a **Granularity** of `15`, `30`, or `60` minutes.
- Use the standard date-selection controls to jump to a different week.

Overhead Menu

The **Overhead** drop-down menu displays a list of overheads:

Grand Total	A read-only statistic; the aggregate overhead for the selected target.
Total Planned	A read-only statistic; the aggregate planned overhead for the selected target.
Total Unplanned	A read-only statistic; the aggregate unplanned overhead for the selected target.

Important

Read-only statistics appear in the **Overhead** menu for the item that is selected in the **Object** pane. If the item is an activity, then the menu lists all **Schedule State Group** overheads that are associated with the activity. If the item is a multi-site activity, the menu lists all **Schedule State Group** overheads that are associated with its child activities.

Using the Grid

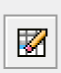
The grid provides columns that display the following statistics:

Week/Time Step	Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the date range and granularity that you selected above.)
[Days or Dates]	If you select the **Month** date range, each group of columns shows statistics for one full day. If you select the **Week** date range, each group of columns indicates one day. (Timestep durations depend on the granularity that you selected above.)
[Weekly Totals]	If you select the **Week** date range, the columns at right show weekly totals for the displayed statistics.

> **Tip**
> You can copy and paste data between the grid and a spreadsheet.

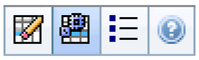
Managing Master Forecast Overhead Data

You can use the following buttons on the **Actions** toolbar (these commands also appear on the **Actions** menu):

Icon	Name	Description
	**Cleanup**	Opens the Cleanup Master Forecast window, where you can remove information from the **Master Forecast** for selected dates and activities.

Master Forecast Graphs View

Use the **Graphs** view to display **Master Forecast** data in a line chart and a table containing forecast values. See the toolbar image here and the button descriptions below.



Displaying the Graphs View

To display the **Graphs** view:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Master Forecast**.
3. From the **Master Forecast** menu on the toolbar, select **Graphs**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

Setting the Data Display Properties and Date Range

Use these controls to customize the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Planning Period**, **Week**, or **Day**.
- **Granularity** *drop-down list*—Specify the increments (granularity) in the data display by selecting from this menu. What choices are available depends upon your selection in the **Period** drop-down list:
  - If you select **Year**: **Monthly**, **Weekly**, or **Daily**.
  - If you select **Month**: **Weekly** or **Daily**.
  - If you select **Planing Period**: **Weekly** or **Daily**.
  - If you select **Week**: **15** (minutes), **30** (minutes), **60** (minutes), or **Daily**.
  - If you select **Day**: **15** (minutes), **30** (minutes), or **60** (minutes).
- **Show Statistics** *drop-down list*—Specifies what data is displayed in the graph and table. Select from these choices: **Interaction Volume**, **AHT**, **Interaction Volume and AHT**, **Calculated Staffing**, **Required Staffing**, **Calculated and Required Staffing**, **Calculated and multi-skill calculated staffing**. Columns in the table are displayed accordingly to the selected statistic.

- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

Reading the Data

The graph shows the statistics, dates, period, and granularity that you selected above. The vertical axis indicates the units shown. If you display multiple statistics, the right and left vertical axes display different units for the two statistics.

The **Legend**, at the bottom, identifies the colors that the graph uses to represent particular statistics, events, or historical data. The **Legend** changes depending on the statistics you selected above. Special events appear as markers on the graph.

Cleanup, Calculation, and Options

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu):

Icon	Name	Description
	**Cleanup**	Opens the Cleanup Master Forecast window, where you can remove information from the **Master Forecast** for selected dates and activities.
	**Use Multi-site activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a **multi-site activity**, **Business Unit**, or **Enterprise** in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Options**	Opens the Options dialog box, where you can further customize the graph.

Options for the Master Forecast Graphs

Use the **Options** dialog box to customize the display of the Master Forecast Graphs view:

1. Select a statistic from the **Show Statistics** drop-down list.
2. Click Options on the toolbar.

One of the following versions of the **Options** dialog box opens, depending on the statistic that you selected above.

- Click the link for a Help topic listed in the table. This takes you to an explanation of the options available for that statistic in the **Options** window.

Statistic selected	Help topic for the corresponding Options dialog box
Interaction Volume	Graph View Options (IV)
AHT	Graph View Options (AHT)
Interaction Volume and AHT (not available in the Historical Data Graphs view)	Graph View Options (IV and AHT)
Required Staffing (not available in the Historical Data Graphs view)	Graph View Options (Staffing)
Calculated Staffing (not available in the Historical Data Graphs view)	Graph View Options (Staffing)
Calculated and Required Staffing (not available in the Historical Data Graphs view)	Graphs View Options (Staffing)

Cleanup Master Forecast Window

Use the **Cleanup Master Forecast** window if you need to remove information from the **Master Forecast** for specific dates and activities.

Warning

This feature deletes all data that was saved for the selected date range and activities. Genesys recommends that you do not use the **Cleanup Master Forecast** feature unless it is absolutely necessary. If you must remove **Master Forecast** data, Genesys recommends that you first extract the data to a forecast scenario (using the Publish Forecast Wizard), and/or make a backup of the WFM database.

To remove **Master Forecast** information:

1. In the **Start date and End date** pane, select the range of dates for which you want to remove data, using the standard date selectors.
2. From the **Activities** list, select the activities whose forecast information you want to remove.
   You can expand business units to display their sites and you can expand sites to display their activities.
   You can select multiple activities across sites.
3. Click **OK** to remove the **Master Forecast** information that you have specified, or click **Cancel** to close the window without changing the **Master Forecast**.

Historical Data

Tip

Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Building Volumes" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

The views in Historical Data are:

Historical Data Volumes	Displays **Interaction Volumes** and **AHT** for historical data that has either been imported into WFM or collected automatically by WFM Data Aggregator.
Historical Data Graphs	Displays your choice of statistics, using line charts and a table, for historical data that has either been imported into WFM or collected automatically by WFM Data Aggregator.

To open these views:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Historical Data**.
3. From the **Historical Data** menu on the toolbar, select Volumes or Graphs.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

Historical Data Volumes View

Use the **Volumes** view to display interaction volumes within imported or collected historical data. This view provides standard date-selection controls and a grid that shows statistics for days or timesteps. See the toolbar image here and the button descriptions below.

Displaying the Volumes View

To display the **Volumes** view:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Historical Data**.
3. From the **Historical Data** menu on the toolbar, select **Volumes**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

Setting the Data Display Properties and Date Range

Use these controls to customize the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, or **Week**. If you select **Week**, you can further adjust each row's time range by selecting **15**, **30**, or **60** (minutes) from the **Granularity** drop-down list.
- **Show Statistics** *drop-down list*—Specify what data is displayed in the graph and table by selecting from these choices: **Interaction Volume**, **AHT**, **Interaction Volume and AHT**.
- **Show Columns** *check boxes*—Show (or hide) data columns in the table by selecting or clearing the **Volume**, **Volume %**, and **AHT** check boxes.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

Reading the Data

The table provides columns that display the following statistics:

Week/Time Step	Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the date range and granularity that you selected above.)
[Days or Dates]	If you select the **Month** date range, each group of columns shows statistics for one full day. If you select the **Week** date range, each group of columns indicates one date, the top row shows daily totals, and each lower row shows statistics for one timestep on that date. (Timestep durations depend on the granularity that you selected above.)
IV	Shows the interaction volume forecast for each day or timestep.
IV%	Shows this row's percentage of the day's total interaction volume.
AHT	Shows the average handling time.
Weekly Totals	If you select the Month date range, these columns show weekly totals, or averages, for the IV, IV%, and AHT statistics.

Tip

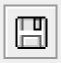
You can copy and paste data between the grid and a spreadsheet. Before doing so, clear the **Volume %** checkbox so the **IV%** column is hidden.

To Edit the Weekly Totals

If you selected the period **Year** or **Month**, you can click inside the **Weekly Totals** cell and edit the value there. Daily values in the same row will automatically adjust their values so that the new **Weekly Total** is redistributed according to the original distribution of volume for each day of the week. This is useful if you have a week, in which you believe the volume will be increased, but you expect the volume to arrive at about the same rate as in your original forecast, day-over-day.

Save and Calculation Options

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu):

Icon	Name	Description
	**Save**	Save changes that you have made to the data. **Save** appears in the toolbar and in the **Actions** menu only if you have permission to edit historical data. To set that permission: 1. In the **Configuration** module, select **Roles > Role Privileges**. 2. In the **Forecast Role Privileges** view, select **Edit Historical Data** check box. 3. Click **Save**.
	**Save As Template**	Opens the Save as Template Wizard, where you can save historical data as a forecast template. When you save historical **IV** or **AHT** for a multi-site activity as a template, only multi-site activity data are saved, never the sum of underlying activities.
	**Use Multi-Site Activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a **multi-site activity**, **Business Unit**, or **Enterprise** in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Find Events Wizard

Icon	Name	Description
	**Find Events**	Click this button (or select **Find Events** from the **Actions** menu) to search for special events in historical data, using the Find

Icon	Name	Description
		Events Wizard.

Find Events Wizard

Use the **Find Events Wizard** to search through historical data for any period of time that represents an anomaly. For example: imagine that the AHT on May 24, 2008, between 8 p.m. and 9 p.m. was 500% higher than on the historical norm for those hours. That is an anomaly in the historical data, and the **Find Events Wizard** could locate it for you.

1. To reach this dialog, start at the **Historical Data Volumes** view.
2. Click **Find Events**  in the toolbar or select **Find Events** from the **Actions** menu.
3. Use these controls to define the search:

Search *radio buttons*	Define the search metrics. Select **IV** to search for events that affected **Interaction Volume**. Select **AHT** to search for events that affected **Average Handling Time**.
Search using granularity *radio buttons*	Define the search increments. Select **Daily** to search through daily data. Select **Hourly** to search through hourly data.
Start date and End date *fields*	Define the search limits. Enter or select a **Start date** and an **End date**. The search will begin at the start date and end at the end date.
Threshold (%) *field*	Define the search criteria. Enter or select the percentage of deviation from historical data, that would identify the event you want to locate. **Range:** A positive integer less than `1000`. For example, you would enter `500` to search for an anomaly that is at least `500%` of normal.

Running the Find Events Wizard

1. Define the search using the controls described above.
2. Click **Find Events** (or click **Cancel** to abandon the search).
   A new tab in the right-hand portion of the window displays these items
   - a **Possible Events** list
   - the **Create Overlay** and **Create Event** buttons
   - an **Existing Events** list
3.

Select an item in the **Possible Events** list.

- The **Create Overlay** and **Create Event** buttons are enabled.
- All **Overlay/Event** items that occur within the date range of the selected **Possible Event** are displayed in the Existing Events list.

Now you can create an overlay (and the event that it must contain) or create an event (and select the existing overlay that must contain it).

4. Choose one of two options:
    1. Click **Create Overlay** to open the New Overlay Wizard, where you create a new overlay and specify its event's parameters in the New Event page.
    2. Click **Create Event** to open the New Event page, where you select an existing overlay and set the event's parameters.

Existing Events List

When you are finished, the wizard or page closes and the newly created overlay/event will appear in the **Existing Events** list, if its **Impact Start Date/Time** occurs within the date range of the selected **Possible Event**.

Otherwise, the overlay/event exists, but it is not displayed.

New Event Page

The **New Event** page opens from the **Find Events** screen when you click the **Create Overlay** button (as the final page of the **Create New Overlay Wizard**) or the **Create Event** button.

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.
   The settings on this page are:

Event Name *field*	Letters, numbers, and symbols are all acceptable in this field. If you enter the name of an existing event, this new event will overwrite it.
Impact Start Date *spinner*	Enter or select the future date that the event is to start.
Impact Start Date *spinner*	Enter or select the time that the event is to start, on the date you specified in the **Impact Start Date** field.
Strength *field*	Enter the strength of the event. The range is any positive value (greater than `0`), up to nine digits and two decimals.
Disregard Historical Data *check box*	Select this check box if the event should disregard historical data. Clear the check box to consider historical data. See Ignoring Historical Data in the "Overlays Primer" topic.

Historical Data Graphs View

Use the **Graphs** view to display historical data in a line chart. See the toolbar image and the button descriptions below.

Displaying the Graphs View

To display the **Graphs** view:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Historical Data**.
3. From the **Historical Data** menu on the toolbar, select **Graphs**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

Setting the Dates, Statistics, Period, and Granularity

Use these controls to customize the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Week**, or **Day**.
  Which options appear in the **Granularity** drop-down list depend on the value selected in the **Period** drop-down list.
- **Show Statistics** *drop-down list*—Specify what data is displayed in the graph and table by selecting from these choices: **Interaction Volume**, **AHT**.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

Reading the Graph and Legend

The graph shows the statistics, dates, period, and granularity that you selected. The vertical axis indicates the units shown.

The **Legend**, at the bottom, identifies the colors that the graph uses to represent particular statistics. The **Legend** changes depending on the statistics that you select.

Calculation and Filtering Options

You can use the following button on the **Actions** toolbar (this command also appears in the **Actions** menu):

Icon	Name	Description
	**Use Multi-Site Activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a **multi-site activity**, **Business Unit**, or **Enterprise** in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Schedules

Get an overview of the Schedule module by reading through the topics on this page. Before creating a schedule, you should:

1. Configure forecast scenarios.
2. Create, build and publish a staffing forecast for each activity you plan to schedule.

> **Tip**
> A single forecast scenario can contain forecasts for multiple activities.

You can create a schedule before publishing a forecast, but many schedule functions (such as Coverage) will be unavailable.

Using the Schedule Module

The **Schedule** module displays agent schedule information in a variety of tables and graphs.

Use the **Schedule** views to:

- Create schedule scenarios, including profile scenarios, which can be used for Schedule Bidding.
- Build the **Schedule**.
- Publish schedule scenarios to, and extract them from, the Master Schedule.
- View weekly and daily schedules for your scenarios and the **Master Schedule**.
- Evaluate schedule coverage for your scenarios and the **Master Schedule**.
- Revise schedules as circumstances require.
- Create, view, edit, remove, and commit pending schedule changes.
- Assign agents to profile schedules, if your scenario includes them.

Schedule Security

You might have full access to all parts of the **Schedule** module or you might have limited access, depending on the settings configured for your Security Role. See Roles.

If you do not have permission to access certain schedule functions, that functionality is disabled.

About Scheduling

The **Schedule** module helps you make the most efficient use of personnel, enabling you to adjust schedules in real time, as workload or agent availability changes. The **Schedule** module builds optimal schedules based on real agents, incorporating their exceptions and preferences into the scheduling process.

Workforce Management builds optimal schedules within a site’s business constraints.

Constraints include:

- Available resources with required skills.
- Service-level requirements.
- Employment contracts and business policies.
- Agent preferences.

Profile Scheduling: Creating Schedules Without Agents

Profile scheduling enables you to model schedule outcomes without having actual agents.

You can create schedules based on user&mash;defined profiles and then assign agents to the resulting schedules; or you can create schedules using a mix of real and profile agents.

Use profile scheduling whenever you want to create a schedule before you actually hire agents.

1. Use WFM Web to define profiles, which consist of contract working rules and a skill set.
2. Use the **Schedule** module to create schedules, using profiles appropriate to the work and to your anticipated hires.
3. Assign newly hired agents to the open slots in the profile schedules.

> **Tip**
> You must assign real agents to profile schedule slots before you can publish those schedule slots to the **Master Schedule**.

Using the Schedule Scenarios View

The Scenarios view enables you to open existing scenarios and work with them. It also enables you to create, edit, or delete schedule scenarios, and to publish them to the **Master Schedule**.

To display the **Scenarios** view:

1. Select **Schedule** from the **Home** menu on the toolbar.
2. Select **Scenarios** from the **Schedule** menu on the toolbar.

Using Other Scenario Views

When you open a scenario, the scenario's name becomes a menu in the toolbar, and an item in the Schedule menu. The following views appear in that menu: Coverage, Weekly, Intra-Day, Agent-Extended, Profiles/Bidding, Summary, and State Group Totals.

To open a view for that scenario, select it from the ***<scenario_name>*** menu.

Opening additional scenarios adds their names to the **Schedule** menu. Use the **Schedule** menu to switch between several open scenarios.

To remove a scenario's views from the displayed lists, close that scenario.

Using the Master Schedule Views

If you have access rights to the **Master Schedule**, then you can select **Master Schedule** from the Schedule menu. **Master Schedule** becomes a menu in the toolbar, from which you can select any of the following **Master Schedule** views: Coverage, Weekly, Intra-Day, Agent-Extended, Summary, State Group Totals and Overtime Requirement. The Changes Approval view is listed only if you have the permission to **Approve Changes** in WFM Web.

To open one of these **Master Schedule** views, select it from the menu.

Pending Schedule Changes

If you do not have security permission to **Approve Changes**, any edits you make to a schedule scenario or the **Master Schedule** are entered as pending. That is, they are visible only to you and do not appear in the publically-visible version of the schedule scenario or the **Master Schedule** until a user who has the **Approve Master Schedule Changes** permission reviews and approves them.

- If you publish a schedule scenario to the **Master Schedule**, pending changes are not published.

- If you extract data from the **Master Schedule** to a scenario, the pending changes do not appear in the scenario.

Approving Pending Changes

There are a number of ways to view and approve or reject pending schedule changes. If the pending changes were created by another user, you can use:

- The Master Schedule Changes Approval view.

If the pending changes were made by you, then you can use:

- The Master Schedule Changes Approval view.
- The Commit/Rollback Multiple Wizard.
- The Commit and Rollback commands from the shortcut menus in the **Schedule Scenario Intra-Day** view and **Master Schedule Intra-Day** view.
- The auto-commit feature in the Insert Multiple Wizard and the Delete Multiple Wizard.

Schedule Scenarios

Use the Scenarios view in the Schedule module to create new scenarios or edit an existing schedule scenario. When you open a scenario, that scenario's name becomes a menu on the toolbar (and a selection in the **Schedule** menu). You can then select the following views from the ***<scenario_name>*** menu:

Coverage	Compares staffing coverage to forecasted (calculated and required) staffing data, and highlights overstaffed or understaffed timesteps.
Weekly	Displays a weekly summary table of total paid hours, working start/end times, or shift names for a site's agents and/or profiles.
Intra-Day	Displays schedule details for a 24- or 36-hour period, enabling you to modify schedules for individual or multiple agents. **Important** You do not need the **Approve Changes** security permission (as required by the **Master Schedule**) to commit your changes (which are only visible to you). You can roll back or remove your own pending changes. You can view your pending changes in the **Weekly**, **Intra-Day**, and **Agent-Extended** views.
Agent-Extended	Displays schedules for one week or the schedule planning period for a single agent.
Profiles/Bidding	Enables you to assign real agents to profile schedule slots.
Summary	Displays service-level and related statistics for the scenario.
State Group Totals	Presents **Schedule State Group Totals** for the configured **Schedule State Groups**.

To open a scenario's views, select it from the submenu. Click **Close**  to close it.

Important

Some restrictions apply when viewing and deleting **Schedule** scenarios:

- Users must have access to at least one **Site** in the **Schedule** scenario to see it.
- Users must have access to all **Sites** in the **Schedule** scenario to delete the scenario.

For more information about other restrictions, see the WFM Server Application **[ConfigService]** MSARestrictAccess configuration option description in the *Workforce Management Options Reference*. The settings in this option determine the level of access to multi-site activities in Schedule scenarios.

Scenarios View

Use Schedule Scenarios to open and work with new and existing schedule scenarios.

This view enables you to create, edit, or delete schedule scenarios, and to publish scenarios to the **Master Schedule**.

Displaying the Scenarios View

To display the scenarios view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Scenarios table (a list) appears at the top of the Data pane.

Opening a Scenario

To open a scenario, double-click it or select it and click **Open**  .

When the **Scenarios** view is active, the **Objects** pane displays the following options:

My Scenarios	Displays scenarios that you have created.
Shared Scenarios	Displays shared scenarios created by other users. Visible only if you have the permission **Access Shared Scenarios**. See the security access rights in Roles.
Other Scenarios	Displays (if you have appropriate access rights) unshared scenarios created by other users.

To select an option:

- Click it. Your selection displays the matching scenarios in the Scenarios table.

Reading the Scenarios Table

The **Scenarios** table appears at the upper right of the WFM Web for Supervisors window. Its rows display scenarios that match your selection in the **Objects** tree. The columns (sortable except for **Comments** and **Extended End Date**) display the following information for each scenario:

Name	The scenario's name.
Start date, **End date**	The start and end dates for the schedule in this scenario. **Range:** from 1 to 6 weeks.
Extended End date	Specifies the time period from the currently-published **Forecast** that will be used to calculate the average staffing needs for this schedule. For example: the schedule itself covers only the time period between **Start date** and **End date**, but the **Forecast** data used to calculate staffing needs for the schedule is based on the time period between **Start date** and **Extended End date**. Tip It's okay if the **Forecast** data covers a shorter period of time than **Extended End Date** defines.
Owner	The name of the user who created the scenario.
Shared	A check mark indicates a shared scenario; an open box indicates one that is not shared.
Comments	Remarks entered by a user who created or edited the scenario.

To populate the **Data** pane with the scenario's details:

- Click a row in the **Scenarios** table.

Editing a Scenario

To edit a scenario:

- Double-click the scenario in the **Scenarios** table. Or click its row in the **Scenarios** table, and then click **Open**.

The controls described below are available to you if you own, or have access rights to, the scenario.

Creating and Managing Scenarios

You can use the following buttons on the toolbar (these same commands also appear on the **Actions** menu):

Icon	Name	Description
	**New**	Opens the New Schedule Scenario Wizard.

Icon	Name	Description
	**Create based on...**	Opens the New Schedule Scenario Wizard. The data in the wizard pages is copied from the scenario that was highlighted when you clicked this icon.
	**Open**	Opens the selected scenario from the **Scenarios** table. You can then edit its properties using the **Data** pane.
	**Close**	Closes the open scenario (and prompts you to save unsaved data).
	**Publish**	Opens the Publish Schedule Wizard for transferring schedule information between the selected scenario and the **Master Schedule**.
	**Delete**	Deletes the selected scenario. Includes a confirmation.
	**Mark as Shared**, **Mark as Not Shared**	Changes the sharing status of the selected scenario.
	**Filter**	Displays the Statuses Filters dialog box, which you can use to control which **Statuses** are displayed. These Statuses are described below.
	**Sort**	Opens a sorting dialog box that allows sorting by **Name**, **Owner**, **Sharing**, **Time of creation**, **Time of last modification**, **Scenario start date**, and **Scenario end date**. You can sort in ascending or descending order.

Scenario Properties—Data Tab

To display the following controls:

- Click the **Data** tab on the **Scenario Properties** pane at the lower right.

Name	Click inside to edit the scenario's name.
Start date, **End date**	Displays the scenario's start and end dates.
Extended End date	Displays the scenario's extended end date.
Owner	Displays the name of the scenario's creator.
Shared	Display only; a check mark indicates a shared

	scenario; an open box indicates one that is not shared.
Created, **Modified**	Displays the scenario's original creation date and last modification date.
Forecast	Displays the associated forecast scenario or MASTER (if the **Master Forecast** is associated).
...	Click this button to display a pop-up list of forecast scenarios, then select one upon which to base the next schedule build. The table lists all forecast scenarios that you can select, to base the next schedule build upon. The first choice is MASTER. This list is not editable, and it contains the following columns for each forecast scenario that is listed: **Name**, **Start Date**, **End Date**, **Owner**, **Shared**, and **Comments**.
Comments	Click inside to enter or edit comments about the scenario.
Save	Click this button to save your changes to the scenario's name and/or comments. Disabled if there are no changes.
Cancel	Click this button to cancel your changes, restoring the scenario's previous name and/or comments. Disabled if there are no changes.

Scenario Properties—Statuses Tab

To display a table with the following information, click the **Statuses** tab on the **Scenario Properties** pane at the lower right. This table's columns are:

Site	Displays the sites covered by this scenario.
Status	See the **Status Column Values** table below for all possible values and their definitions.
Bidding Start	Bidding start date for this scenario, defined in **Control Bidding Process Wizard**. (Exclusive to bidding scenarios).
Bidding End	Bidding end date for this scenario, defined in **Control Bidding Process Wizard**. (Exclusive to bidding scenarios).
Ranking Used	Ranking system used for this scenario, defined in **Auto-Assign Schedules** dialog. (Exclusive to bidding scenarios).
Last Published	Date and time that this scenario was last published to the **Master Schedule**.

Status Column Values

This table defines each possible value that may appear in the **Status** column.

New	This scenario was just created and has no schedule built for it.
Imported	This scenario was imported from the **Master Schedule**.
Scheduled	A schedule was built for this scenario.
Scheduled with Profiles	A schedule containing profile agent schedules was built for this scenario.
Profiles Assigned	A schedule containing profile agent schedules was built for this scenario, and every profile agent schedule has an actual agent assigned.
Published	This scenario was published to the **Master Schedule**.
Bidding Pending Scenario	This scenario has a bidding window and agents defined, but the current date is before the bidding window's start date. (Exclusive to bidding scenarios).
Open for Bidding	This scenario is currently open for bidding. (Exclusive to bidding scenarios).
Bidding Closed	This scenario is closed for bidding. (Exclusive to bidding scenarios).

New Schedule Scenario Wizard

Use the **New Schedule Scenario Wizard** to create a new schedule scenario:

1. On the **Schedule Scenarios** view toolbar, click New.
   The wizard opens to the General Parameters screen.
2. Fill in the necessary information on each screen (for details, see General Parameters), and then click **Next**.
   - Clicking **Help** on any screen opens a **Help** page that explains that screen's options.
   - Clicking **Back** returns you to the previous screen, if you need to revise your entries there.
3. Click **Finish**.
   The scenario is created.

In the **Schedule Scenarios** view, you can now select **My Scenarios** to load the scenario into the Scenarios table.

New Schedule Scenario: General Parameters

To fill in the first New Schedule Scenario Wizard's **General Parameters** screen:

1. In the **Name** text box, enter a name for the schedule scenario.
2. If you want this scenario to be available to other WFM users, select the **Shared** check box.
3. If you want to base this scenario on one that already exists, select the existing scenario from the **Based on** drop-down list.
   Basing your new scenario on an existing scenario is a convenient way to build schedules with frequently used settings. The wizard takes the dates, activities, and agents (real, virtual, and profile) from the source scenario and applies them to the new scenario. You can then change these parameters.
4. In the **Start Date** field, enter (or select) the scenario's start date.
   You can type directly into the field, use the up or down arrow to modify the displayed date, or click the button at the right to display a calendar.

   > ## Important
   > If the `WeekStartDay` setting has been specified in Business Units Properties, your scenario's starting weekday must match this setting. Otherwise, your scenario starts on the first weekday as determined by your operating system's regional settings.

5. In the **End Date** field, enter (or select) the scenario's end date. The maximum time between **Start date** and **End Date** is 42 days (6 weeks).

   > ## Important
   > You must build the scenario in units of one week. For example, if the schedule starts on a Monday, it must end on a Sunday. Schedules must be at least one week, and no more than six weeks, long. WFM Web always obeys schedule period constraints, if you are using a scheduling period for your site, regardless of the number of weeks in the scenario.

6. In the **Extended End Date** field, enter (or select) the scenario's extended end date, if necessary.

   > ## Important
   > Default value: the scenario’s end date. This value is useful when you create a schedule scenario for bidding. (Use the Profiles/Bidding view to configure bidding.) Edit this value manually to specify an extended end date for the scenario ...to specify that the schedule will apply over a longer period of time (maximum: 6 months).
   >
   > For example, **Extended End Date** could define an entire quarter—3 months. **Start Date** and **End Date** could define a period of 1 week

> that Agents actually use for bidding. When the schedule scenario is published to the **Master Schedule**, the 1-week schedule would be repeated for the entire quarter.
>
> You can also use this value to extend a non-bidding schedule for real agents in the same way: create a 1-6 week schedule that repeats itself over a longer period of time. When you publish this schedule scenario out into the future, you can optionally ask WFM to overlay items from the **Calendar**, such as days off, time off, and exceptions.

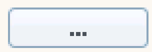
7. Optional: Enter text into the **Comments** field.
8. Optional: Select the **Use forecast data from forecast scenario** check box to specify that the schedule will be built based on a forecast scenario, instead of on the **Master Forecast**.
   If you select this check box, the next wizard screen will be the Select Forecast Scenario dialog box.
9. Click **Next** to proceed to the next screen.

New Schedule Scenario: Select Forecast Scenario

In the **New Schedule Scenario Wizard**, select a forecast scenario from the list, to specify that the next schedule build will be based upon it.

This list is not editable, and it contains the following columns for each forecast scenario that is listed: **Name**, **Start Date**, **End Date**, **Owner**, **Shared**, and **Comments**.

Important

You can also reach this dialog box by clicking the  button that appears next to the **Forecast** field in the **Schedule Scenarios** view. In this case, the first choice in the list is MASTER, to specify that the schedule will be built based upon the published **Master Forecast**.

New Schedule Scenario: Select Activities

To fill in the **Select Activities** screen of the New Schedule Scenario Wizard:

1. Select all activities that you want to include in this schedule.
2. In the **Activities** list, you can expand business units to display their sites and expand sites to display their activities.

> **Tip**
> You can select any number of activities or add activities later, but you can add them only for the sites that you select now, on this screen. If you checked **Use forecast data from forecast scenario** in the **General Parameters** screen of this wizard and selected a Forecast scenario in the **Select the Forecast Scenario** screen, all activities from the Forecast scenario are automatically selected in this screen.

3. Optional: Select the **Additionally Filter Agents By Contracts** check box to enable the Filter By Contracts page, which appears next when enabled.
4. Click **Next** to proceed to the next screen.

Week Start Day Validation

WFM applies the following validation rules:

- If you select activities from two BUs with different week start days, the following warning appears: *It is not possible to create schedule scenario for selected business units because they have different week start days. You must select BUs with the same week start day to proceed.*
- If you select BUs that have the same week start day, but select a scenario start date that is not the first week start day, the following warning appears and will not allow you to proceed: *Selected scenario start date does not match selected business unit(s) week start day, <week day name>. Please, return to previous page and select appropriate start date.*

The **New Schedule Scenario Wizard** date selection controls use the locale settings and does not attempt to enforce the week start day.

New Schedule Scenario: Filter By Contracts

This page appears in the New Schedule Scenario Wizard only if you selected the **Additionally Filter By Contracts** check box in the Select Activities screen.

1. Select one or more contracts from the tree, which includes business units**, sites, and contracts.**

   > ## Important
   > The tree shows only those contracts that the scenario included when it was created and, by default, all contracts matching the activities that are selected on the **Select Activities** screen, are selected

   .

2. Click **Next** to proceed to the next screen.

New Schedule Scenario: Add Agents

To fill in the **Add Agents** screen of the New Schedule Scenario Wizard:

1. Select the agents that you want to include in the scenario.
   In the **Agents** list, you can expand **Business Units** to display their sites and expand sites to display their agents. The list shows only those agents who have the skills that are required for the activities you selected on the Select Activities screen.
2. To fill the new scenario with the schedules from the source (**Based on**) scenario, select the **Copy Schedules** check box.
3. To insert a granted exception, time off or day off item from the calendar, select the **Insert granted exception, time off and day off calendar items** check box.

   ## Tip

   You can insert multiple items. However, this check box is enabled only if the following conditions are met:

   - The scenario you are creating is based on an existing scenario.
   - The **Copy Schedules** check box is selected.

4. Click **Next** to proceed to the next screen.

New Schedule Scenario: Add Profile Agents

In the New Schedule Scenario Wizard's **Add Profile Agents, Based on Real Agents** screen, Profile Agents are *generic* agents that you create by omitting preferences and exceptions.

About Scheduling with Profiles

You can create schedule scenarios using a mix of real agents and profiles. You can also create schedule scenarios based on user-defined profiles, and then assign agents to the resulting schedules. See the Scenario Profiles view for instructions.

When you use profiles, you generate a schedule scenario that includes open schedules. An open schedule is one that has no agents assigned to it. You can then insert agents into the open schedules using any criteria. (WFM automatically filters the list of qualified agents, based on the selected schedule.)

Agents are displayed in a tree, which is inside a table with these columns:

- **Agents**—Each agent's name.
- **Present**—The number of agent profiles, based on this real agent, that are already present in scenario. This number is read-only.
- **Add**—Select the check box in this column to add this agent's profile to the scenario. Clear the check box to not add the profile. As a shortcut, you can select a single check box for any *branch* of the tree—business unit, site, or team—to select all items beneath it.

To add profile agents who are based on real agents into the same team as real agents:

1. Select or clear individual agent check boxes, as needed.

> **Tip**
> A profile agent inherits the contract and skill set of the selected real agent, but the profile agent's schedule slot is not assigned to this (or any other) real agent. Use profile agents when you create a bidding scenario. See the topic Configure Bidding Scenario in the **Schedule Bidding** section.

2. Select or clear the **Place Profile Agents, Based On Real Agents**, **Into Their Teams** check box.
3. Click **Next** to proceed to the next screen.

New Schedule Scenario: Add Profiles

To fill in the final New Schedule Scenario Wizard's **Add Profiles** screen:

1. Expand and/or scroll through the **Profiles** list to select the number of each type of **Contract** profile that you want to include in this scenario.
   You can expand business units to display their sites and expand sites to display their profiles. The list shows only those profiles that have the skills that are required for the activities you selected on the Select Activities screen.
2. Modify (if necessary) the number of occurrences each profile that should be included in the scenario.
3. Click **Finish**.
   This saves your new scenario and restores the **Schedule Scenarios** view.

Add Profiles vs. Add Profile Agents

Here is the difference between the profiles on this screen, and the profiles on the previous screen:

- On the previous **Add Profile Agents** screen, you have the opportunity to select *profile agents*. This will result in the schedule scenario including open schedules, based on hypothetical agents that are similar in skill set and **Contract** to the agents whose profile you select.
- On the **Add Profiles** screen, you are selecting *profiles*. A profile is based on a **Contract**, and is defined by a set of one or more skills and skill levels that are required for an agent to fit this profile. When creating a schedule, you can include any combination of real agents, profile agents, and profiles.

Building Schedule Dialog

The **Building Schedule** dialog appears after you click **Finish** in the **Schedule Build Wizard**. This dialog displays the schedule building progress and basic information about the built schedule scenario.

The **Schedule Information** section, contains information about the schedule, such as the sites that are included in this build, the number of days in the schedule scenario, he number of agents, and the schedule start date.

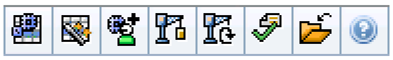
The **Build Progress** section contains status information, such as the start time, the elapsed time, and the **Current Status**, indicating how the build is proceeding. After the schedule is built, the **Current Status** changes to **Done** and you can review any messages that were generated during the schedule building process. The number of messages is displayed in the bottom section of the dialog. Other information in this section includes, the number of iterations of the schedule, the minimum, maximum, and probable **Agent Count Range** used in this schedule build.

Clicking the one of three buttons in the **Building Schedule** dialog enables you to take the following actions:

- **Review Messages**—Opens the Review Messages dialog. Enabled only if schedule building caused messages to be generated.
- **Stop and Save**—Enabled only if **Optimize Profiles** is selected after the application builds the first valid schedule (see Schedule Build Parameters). The application sometimes continues to build additional schedules to create an optimal schedule. To speed up the schedule building process, you can interrupt this process and save the latest results. However, this can result in schedules that are less optimal.
- **Close**—Closes the **Building Schedule** dialog.

Scenario Coverage View

Use the Scenario Coverage view to compare a schedule's staffing coverage with the forecast (calculated and required) staffing data. See the toolbar image here and the button descriptions below.



Graphs and tables show you coverage for each weekday in the selected week, along with totals for the whole week and scenario. **Overstaffed** and **Understaffed** timesteps appear in a distinctive color.

Displaying the Scenario Coverage View

To display the **Scenarios** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Schedule Scenarios table appears.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking **Open**  .
   The scenario's name appears on the toolbar, as a menu.

   To display the open scenario's **Coverage** view:
4. From the **scenario_name** menu on the toolbar, select **Coverage**.
5. In the Objects pane, select a single **business unit**, a single **site** within a business unit, a **multi-site activity**, **activity group**, or a single **activity** within a site.

Using the Daily Graphs and Tables

The **Coverage** view displays the following information for days of the week:

Graphs	Display coverage information for each day, with a data point for each timestep. Select from the Chart Type drop-down menu to display calculated staffing, required staffing, or both (advanced). A blank graph indicates a closed site (or no scheduled activity) for the day.

Tables	Display overstaffing and understaffing totals for each day, with respect to calculated **and/or required staffing. Contractual constraints and other configured parameters can reduce a schedule's optimization.**
Legend	Explains the significance of each color used in the graphs.

Reading the Totals Table

The **Totals** table (at the lower right) displays overstaffing and understaffing totals for the selected week and for the whole schedule scenario, with respect to calculated and/or required staffing.

Customizing the Scenario Coverage View

Use the following controls (at top of the working pane) to customize the schedule coverage data:

Chart Type

Select the type of graphs that you want to be displayed:

Advanced	Graphs present both calculated and required information. Calculated information appears as an area graph with overstaffing/understaffing data, and required staffing appears as a linear graph.
Calculated	Graphs present calculated information with overstaffing/understaffing data.
Required	Graphs present required information with overstaffing/understaffing data.

Date

Use the standard date-selection controls to move to other weeks within the scenario's date range.

Toolbar Buttons

Use the buttons on the toolbar (these commands also appear in the **Actions** menu) for the following:

Icon	Name	Description
	**Use Multi-site Activities**	Controls whether WFM Web's calculation of aggregated

Icon	Name	Description
		information includes multi-site activities. You can select this button only if you first select a **multi-site activity**, **Business Unit**, or **Enterprise** in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Publish**	Opens the Publish Schedule Wizard, where you can publish a portion of the selected scenario to the **Master Schedule**, or extract a portion of the **Master Schedule** to the selected scenario.
	**Add/Remove scenario elements**	Opens the Add/Remove Scenario Elements Wizard, where you can add activities, and add or remove agents, for the current schedule scenario.
	**Build schedule**	Opens the Schedule Build Wizard, which builds a complete schedule for the selected site.
	**Rebuild schedule**	Opens the Schedule Rebuild Wizard, where you can modify and rebuild schedules, while optionally leaving intact any agent schedules that you have edited since the last build/rebuild.
	**Validate schedule**	Opens the Review Messages window, which lists scheduling warnings for a selected site. Warnings will only be visible if you have built a schedule for this scenario and you saved any warnings that were generated.
	**Close**	Closes the open scenario (and prompts you to save unsaved data).

How Understaffing and Overstaffing Are Calculated

Any timestep can be subject to either understaffing or overstaffing. WFM calculates these conditions by evaluating **Coverage** against **Forecast**.

- **Understaffing**—The **Forecast** is greater than the **Coverage**. There are too few agents on duty.
- **Overstaffing**—The **Forecast** is less than the **Coverage**. There are too many agents on duty.

Important

Coverage is an estimate of the agents’ contributions to the presented activities, and is displayed in the time format (`hh:mm`). These contributions are based on the agents' scheduled activities for each time interval, and on any schedule items that affect these scheduled activities for an interval (such as a break that occurs during only part of an interval).

Totals are calculated by summing understaffing/overstaffing for all activities for a given time range (because each single understaffing/overstaffing value is for one timestep).

Scenario Weekly View

Use the **Scenario Weekly** view to display a summary table of total paid hours, working start/end times, or shift names. The table shows this information for a selected scenario, and for selected agents and/or profiles.

Agents can be selected under different sites at the same time, but all sites must be within a single business unit. See the toolbar image here the button descriptions below.

The **Scenario Weekly** view also enables you to see summary tables of total paid hours, working start/end times, or shift names for your schedule planning period. See Mode for details.

Displaying the Scenario Weekly View

To display the Scenarios view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Schedule Scenarios table appears.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking **Open**  .
   The scenario's name appears on the toolbar, as a menu.

   To display the open scenario's **Weekly** view:
4. From the **scenario_name** menu on the toolbar, select **Weekly**.
5. On the Objects pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below).
   WFM then selects matching item(s) from the other tree.

   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select multiple sites, teams, and agents, but only one business unit.

   If profile agents were created for this site during schedule building, these profiles appear within a **Profiles** team.
6. Click **Get data** to populate the **Weekly** view table for the selected agents.

Using the Table

The **Weekly** view table contains rows for each agent or profile that you selected in the **Objects** tree. (If a scroll bar is displayed to the right, you can use it to reveal more agents.)

This table includes the following columns:

<table>
<tr><td>[Expand/Collapse]</td><td>If in Planning Period mode, the first column provides expand/collapse controls that you use to display or hide each agent's or profile's weekly schedule details.</td></tr>
<tr><td>Team</td><td>This column lists each agent's or profile's team.</td></tr>
<tr><td>Agent</td><td>Two columns show an icon representing this agent's or profile's contract, and then the agent's or profile's name.</td></tr>
<tr><td>[Week Start Dates]</td><td>In Planning Period mode, when you display agent details, the rows below each agent's or profile's name indicate the start date for each week in the scenario.</td></tr>
<tr><td>[Weekdays]</td><td>These cells show agent schedule information for each weekday, for each week in the scenario. The cells' contents correspond to your selection from the Show Data for drop-down list.

If the agent is not scheduled for a shift, the cell contains Day Off, the name of a full-day time-off type, <shift> (for scheduled working hours without a shift), or an exception name (for scheduled full-day exceptions).

An icon in the cell for a weekday indicates whether the schedule has been changed for that agent.
If the agent's schedule for that day was assigned during scheduling or rescheduling, no icon appears.
If the agent's day was edited after scheduling or rescheduling, a light-gray pencil icon appears.
If the agent's day was assigned by trading or swapping, the swap icon appears.
A Yield icon (upside down red triangle) appears if there are pending changes that have not yet been committed to the scenario.
If there have been multiple changes, the icon represents the most recent status.</td></tr>
<tr><td>Weekly Totals</td><td>Shows each agent's or profile's total paid hours for the displayed week.</td></tr>
<tr><td>Long (Planning) Period Totals</td><td>Shows each agent's or profile's total paid hours for the schedule planning period. This period's duration and start date are set in the Policies > Contracts > Site Settings tab.</td></tr>
</table>

The **Weekly Totals** and **Period Totals** boxes below the table show a grand total of the paid hours for all selected agents for the weekly or planning period, respectively.

If the `WeekStartDay` setting has been specified in Business Units Properties, the first weekday is the one specified in `WeekStartDay`. Otherwise, the first weekday is the one specified in your operating system's regional settings.

Customizing the Scenario Weekly View

To customize the displayed table, use these controls at the top of the working pane:

Show Data for

From this drop-down list, select what you want to be displayed inside each day's table cell:

Total Paid Hours	Total paid time for the day.
Start/End Times	Start and end times of agents' work.
Shift or **Schedule State Names**	Names of agents' assigned shifts and other full-day states.

Mode

Select one **Week** or **Planning Period** from the **Mode** drop-down list. The table displays data for the selected period. If no schedule planning period was configured or if more than one site is selected on the **Object** pane, then the **Planning Period** option is disabled.

The Scenario Planning Period Mode

The **Scenario Planning Period** mode displays schedules for the entire planning period, even if the scenario range is shorter than the number of weeks in your planning period or if the scenario's date range falls on the boundary between two different planning periods.

In these cases, different shades of white and gray indicate the type of date range that you are viewing.

Planning Period Color Legend:

- **White**—Indicates dates that fall within both the scenario period and the planning period.
- **Light Gray**—Indicates dates that fall within the scenario period but are outside the planning period.
- **Gray**—Indicates dates that fall outside the scenario period but are within the planning period.
- **Dark Gray**—Indicates dates that are outside both the scenario and the planning period.

Filter and Sort the Schedule Data

You can use the following buttons on the **Actions** toolbar (these commands also appear in the **Actions** menu) to further customize the displayed table:

Options	Opens the Options dialog box. Enables you to customize the view by including the **Agent Rank** and **Site Name** columns.
Filter	Enables you to filter the displayed information by activities and contract types. (If you set a new filter, this immediately refreshes the view.)
Sort	Opens the Sorting dialog box, which allows sorting by name, owner, sharing, time of creation, time of last modification, scenario start date, or scenario end date. You can sort in ascending or descending order.

Searching for an Agent

To find a specific agent in the **Scenario Weekly** view:

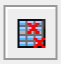
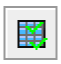
1. To search the table for particular agents, select **Find** from the **Edit** menu or press Ctrl + F.
   The Find Agents dialog box opens. You can search by first or last name.
2. Enter part or all of the agent's name, and then click **OK**.
   The Weekly view display shifts to display the table row for the selected agent.

Toolbar: Modifying the Schedule

You can use the following buttons on the **Actions** toolbar (or on the **Actions** menu) to modify the displayed schedule scenario:

Icon	Name	Description
	**Publish**	Opens the Publish Schedule Wizard, where you can publish a portion of the selected scenario to the Master Schedule, or extract a portion of the Master Schedule to the selected scenario.
	**Add/Remove schedule elements**	Opens the Add/Remove Schedule Elements Wizard, where you can add activities, and add or remove agents, for the current schedule scenario.

Icon	Name	Description
	**Build schedule**	Opens the Schedule Build Wizard, which builds a complete schedule for the selected site.
	**Rebuild schedule**	Opens the Schedule Rebuild Wizard, where you can modify and rebuild schedules, while optionally leaving intact any agent schedules that you have edited since the last build/ rebuild.
	**Re-build intra-day schedule**	Opens the Intra-day Schedule Rebuild Wizard to rebuild an Intra-Day schedule for a specific day or time period for a site, team, or agent.
	**Validate schedule**	Opens the Review Messages window, which lists scheduling warnings for a selected site. Warnings will only be visible if you have built a schedule for this scenario already, and you chose to save any warnings that were generated.
	**Close**	Closes the open scenario (and prompts you to save unsaved data).
	**Options**	Opens the Options dialog box. Enables you to select/de-select the Agent Rank and Site Name columns..
	**Filter**	Opens the Filter dialog box. Enables you to filter the displayed information according to activities and contract types. (If you set a new filter, this immediately refreshes the view.)
	**Sort**	Opens the Sorting dialog box. Here you can sort schedules by Site name, Team Name, Contract, Agent Name (first or last), or Agent Rank. You can then sort agents by First name or Last name, and you can sort the entire list by ascending or descending order. Tip **Agent Rank** sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank.

Icon	Name	Description
	**Swap**	Opens the Swap Agent Schedules Wizard, which enables you to swap two agents' schedules.
	**Insert Multiple**	Opens the Insert Multiple Wizard, which enables you to add multiple items to the scenario at one time.
	**Delete Multiple**	Opens the Delete Multiple Wizard, which enables you to remove multiple items from the scenario at one time.
	**Commit/Rollback Multiple**	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes into the schedule scenario or to remove them and return the scenario to its former settings.
	**Meeting Scheduler**	Opens the Meeting Scheduler, which enables you to schedule meetings to already build scenario for selected agents.

Scenario Intra-Day View

Use the **Intra-Day** view to manage schedule details for agents and profiles, for a selected scenario on a specific day. See the toolbar image here and the button descriptions below.

If you selected the **Show Performance Information** check box on the **Performance** tab of the Options dialog box, this window also shows performance data in a graph. If you have cleared the **Full-Day View** check box, data is also shown in a table.

You can modify schedule items for individual agents or profiles in this view, and insert schedule items for multiple agents and/or profiles.

Displaying the Intra-Day View

To display the **Scenarios** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Schedule Scenarios table displays.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking **Open**
   
   .
   The scenario's name appears on the toolbar, as a menu.

To display the open scenario's **Intra-Day** view:

1. From the scenario_name menu on the toolbar, select **Intra-Day**.
2. On the Objects pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.

   > **Tip**
   > A default performance target is selected for the **Intra-Day** schedule view. To change that selection, see Performance Data Target.

3. Click **Get data** to display the **Intra-Day Performance** graph (if you have opted to view it) and the schedule grid.

Adjusting the Time Zone

From this drop-down menu at the top right of the view, select the **Time Zone** that WFM should use to display the data in graphs and tables for this view.

Using the Grid

The **Intra-Day** view includes a grid with one row per agent, and the following fields and controls. You can sort by columns such as site, team, contract, agent, shared transport, overtime, paid hours, total hours, and start time by clicking on the header for that column.

Scheduled agents *display*	This indicator shows the number of agents displayed (based on your selection in the **Objects** tree).
Edited schedules *display*	This indicator shows the number of agents whose schedules you have edited in this view, but not yet saved.
Full-Day View *check box*	Select the **Full-Day View** check box to have the **Intra-Day** grid display the entire day. If you clear this check box, the grid shows a more detailed view.
Date: *selectors*	These controls are standard date selectors.
! *messages & warnings column*	This column contains icons that provide information about the agents' schedules. • A green pencil icon indicates schedule items that you have changed but not yet saved. • A red pencil icon indicates an item that generated an error. (Error conditions are more serious than warning conditions.) • A light-gray pencil icon indicates that the agent's day was edited after scheduling or rescheduling. • A swap icon indicates that the agent's day was assigned by trading or swapping. • A yellow icon indicates an item that generated a warning and you chose the **Fix Later** option. • A Yield icon (upside down red triangle) appears if there are pending changes not yet committed to the scenario. • An agent icon and red check box appear for every schedule day that contains a granted calendar item (if the option **Show agents with granted and scheduled rotating pattern** or any other calendar preference is selected in the

	Options dialog box). Double-click a yellow or red icon to review message details and resolve the unsaved items.
Site *column*	This column indicates each agent's assigned site.
Team *column*	This column indicates each agent's assigned team.
Contract *column*	This column indicates each agent's assigned contract. The **Contracts** button is displayed in the column.
Agent *column*	This column indicates each agent's name.
Shared Transport *column*	If displayed (using the Options dialog box), this column shows the membership for each agent in **Shared Transport Group** on the selected day.
Overtime *column*	If displayed (using the Options dialog box),Options dialog box), this column shows the duration of overtime for each agent on the selected day.
Paid Hours *column*	If displayed (using the Options dialog box), this column shows each agent's paid hours for the selected day.
Total Hours *column*	If displayed (using the Options dialog box), this column shows each agent's total hours for the selected day.
Start Time *column*	If displayed (using the Options dialog box), this column shows each agent's start time for the selected day's work.
(**Accessible Schedule Details**) *button*	If displayed (using the Options dialog box), you can click this icon to display the Accessible Schedule Details dialog box, which simplifies and organizes commands for vision-impaired users and the screen readers that they use.
* (**Memo**) *column*	If this column is displayed (using the Options dialog box), an asterisk (*) indicates that a comment or additional information was saved for the indicated agent and schedule day. Double-click a column cell to view or edit the memo.
[Timesteps] *column*	These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the Full-Day View check box and/or resize the columns. To make changes to one agent's schedule at a time, right-click the timestep that you want to modify and then select the command from the shortcut menu. See Modify Individual Agent's Schedules for instructions and explanations.
[Horizontal scroll bar]	Appears below the table when clearing the Full-Day View check box causes some timesteps to be hidden offscreen. Scroll it to the right to display later timesteps.

Legend	Indicates the particular type of schedule item that each bar color represents.
Details *field*	When you click an agent's row, this field lists the agent's scheduled activities on the selected day. It displays only what fits in one line: additional information does not appear.

Customizing the Grid

You can display more timesteps by resizing some columns to the left of the table. For details, see Getting Started.

Search for an Agent

To find a specific agent in the **Scenario Intra-Day** view:

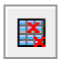
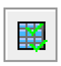
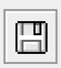
1. Use the **Find Agent** dialog box to search the table for particular agents. To open it, select **Find** from the **Edit** menu or press [Ctrl] + F.
   The **Find Agent** dialog box opens.
2. Search by first or last name. Enter part or all of the agent's name and then click **OK**.
   The **Intra-Day** view display shifts to display the table row for the selected agent.

Toolbar: Modifying Multiple Agents' Schedules

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu) to modify multiple agents' schedules at once, to further customize the displayed table, or to modify the selected scenario:

Icon	Name	Description
	**Publish**	Opens the Publish Schedule Wizard, where you can publish a portion of the selected scenario to the **Master Schedule**, or extract a portion of the **Master Schedule** to the selected scenario.
	**Add/Remove scenario elements**	Opens the Add/Remove Scenario Elements Wizard, where you can add or remove activities and agents for the current schedule scenario.

Icon	Name	Description
	**Build schedule**	Opens the Schedule Build Wizard, where you can build a complete schedule for the selected site.
	**Rebuild schedule**	Opens the Schedule Rebuild Wizard, where you can rebuild agent schedules, while optionally leaving intact any agent schedules that you have modified since the last build/ rebuild.
	**Rebuild intra-day schedule**	Opens the Intra-day Schedule Rebuild Wizard to rebuild an **Intra-Day** schedule for a specific day or time period for a site, team, or agent.
	**Validate schedule**	Opens the Review Messages window, which lists schedule warnings that the server returns for a selected site.
	**Close**	Closes the open scenario (and prompts you to save unsaved data).
	**Options**	Opens the Options dialog box. Enables you to customize the view, including whether to show agent availability, whether to use a 24-hour or 36-hour display, whether to display performance data, and whether to display or hide the **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, and **Comment** columns.
	**Filter**	Enables you to filter the displayed schedule information.
	**Sort**	Enables you to sort the table.
	**Auto-Commit**	The **Auto-Commit** toolbar button toggles on and off the auto-commit feature. The feature is also turned on and off by selecting **Auto-Commit** on the **Actions** menu. If it is on, changes are immediately applied to the scenario. If it is off, the changes have pending status and can be committed/approved before they are incorporated in the publicly-available version of the schedule scenario.

Icon	Name	Description
	**Swap**	Enables you to swap two agents' schedules.
	**Insert Multiple**	Opens the Insert Multiple Wizard, which enables you to insert breaks, meals, exceptions, days off, time off, shifts, marked time, and work sets for multiple agents or teams.
	**Delete Multiple**	Opens the Delete Multiple Wizard, which enables you to remove multiple items from the scenario at one time.
	**Edit Multiple**	Opens the Edit Multiple Wizard, which enables you to edit multiple items in the scenario at one time.
	**Commit/Rollback Multiple**	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes (changes entered when auto-commit was off) into the schedule scenario or to remove them and return the scenario to its former settings.
	**Save**	Saves any changes that you have made to the current scenario. If the server cannot save all changes, red or yellow icons in the grid's first column indicate the agents for whom you must correct errors or acknowledge warnings.
	**Meeting Scheduler**	Opens the Meeting Scheduler, which enables you to schedule meetings to already build scenario for selected agents.
	**Move to Current Day**	Also known as the *Today* button. Click this button to display data for today.

Tip

- To make detailed scheduled changes for one agent at a time (such as inserting, editing, or deleting the agent's schedule items), see Modifying Individual Agents' Schedules.
- If you make schedule changes in the **Intra-Day** view and do not click **Save**, you are prompted to save your changes when you select a different module or view, or when you launch certain wizards or child windows.

- If you change the shift start time or shift end time for an agent who belongs to a shared transport group, you will see a warning message when you save the change.

The Performance Data Display

Selecting the **Show Performance Data** check box on the **Performance** tab of the Options dialog box adds a chart and a table to the top of the **Scenario Intra-Day** display.

Tip

The table appears only if you clear the **Full-Day View** check box.

To configure the performance data views:

1. Select a target for the performance data by clicking the button next to the **Target:** label. The Select Target list that appears contains the activities associated with the site selected on the **Objects** pane, activity groups, and the multi-site activities associated with the current scenario.
2. Select the granularity in which performance data should be presented: **15**, **30**, or **60** minutes.
3. Select the type of data to be displayed in the graph and table. Schedule coverage appears as a red line on the graph.
4. To configure the graph, select a value from the **Chart Type** drop-down list:
   - **Calculated** (default)
   - **Required**
   - **Advanced** (both **Calculated** and **Required**)

   The table always displays values for schedule coverage and calculated staffing. It might show additional figures, depending on your selections on the **Performance** tab of the Options dialog box.

If you are not using automatic updates, click **Refresh Performance Data**  to update the performance data view.
You can select **Update Automatically** on the **Performance** tab of the Options dialog box.

The label **Multi-Skill Enabled** appears on the right end of the **Performance Data Display** if you enabled the `SplitMS` option. See the *Workforce Management Administrator's Guide*.

Scenario Intra-Day: Publish Schedule Wizard

Use the **Publish Schedule Wizard** to publish a date range from the selected scenario to the **Master Schedule**, or to extract a date range from the **Master Schedule** to the selected scenario.

At any scenario view, click **Publish**  . The wizard activates and presents these screens:

Select Action screen

1. Select the radio button that corresponds to the action you wish to take:
   - Publish to the Master Schedule
   - Extract from the Master Schedule
2. Click **Next**.

Publish to the Master Schedule from Scenario screen

This screen appears only if you selected **Publish** to the **Master Schedule** at the previous screen.

1. Make the following selections:
   a. In the **Dates** area, use the spin boxes or pop-up calendars to specify **Start** and **End dates** for the selected scenario.
   This date range is the publishing *source*.
   b. Select the **Publish To Date Range** check box to activate that area, then use the spin boxes or pop-up calendars to specify **Start** and **End dates** for the **Master Schedule**.
   This date range is the publishing *destination*.
   c. In the **Agents** area, select agents from an object tree individually, or in groups by selecting teams, sites, BUs, or Enterprise.
   d. Select the **Insert Granted Exception**, **Time Off** and **Day Off Calendar** items check box to specify that this action is performed during publication.
2. Click **Finish** (or **Previous** to return to the **Select Action** screen).

Extract from the Master Schedule to Scenario screen

This screen appears only if you selected **Extract** from the **Master Schedule** at the previous screen.

1. Make the following selections:
   a. In the **Dates** area, use the spin boxes or pop-up calendars to specify **Start** and **End dates** for the selected scenario. This date range is the publishing *source*.
   b. In the **Agents** area, select agents from an object tree individually, or in groups by selecting teams, sites, BUs, or Enterprise.
2. Click **Finish** (or **Previous** to return to the **Select Action** screen).

Scenario Intra-Day: Performance Data Target

To view performance data in the **Master Schedule Intra-Day** view or the **Schedule Scenario Intra-Day** view, you must choose a target. The target is the source of the performance data. You can select the Enterprise, a business unit, a site, an activity group, or an activity (either multi-site or single-site).

To change the **Select Target** window:

- Click the **Target:** button on the **Schedule Intra-Day** view window 

.

> **Important**
> This option is available only if you have chosen to view performance data by selecting the **Show Performance Information** check box on the **Performance** tab of the **View Options** dialog box.

Selecting the Appropriate Time Zone

When you select a site on the **Object** pane (for example, San Francisco), you are also specifying that site's time zone, which may differ from the data source's time zone. You can change the time zone manually by selecting the appropriate zone from the **Time Zone** drop-down list near the upper right of the **Intra-Day** view. The selected time zone is applied to the grid and graphs that you view when you request performance data. Schedules and whatever you select to view would be displayed in the selected time zone, regardless of the data source's local hours (WFM makes the appropriate time conversion).

Viewing Multi-Site Activity Data

Select the **Use Multi-site Activities** check box to display forecast data that is taken from multi-site activities (MSAs), and schedule data that is the sum/average of **Activities** under your selected target (MSA, business unit, or site). All data is transposed to the time zone of the site that you selected on the **Object** pane.

Clear the **Use Multi-site Activities** check box to display all MSA data as a sum/average. All data is transposed to the selected site's time zone.

If you set the **Use Multi-site Activities** button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Scenario Intra-Day: Edit Comments Dialog Box

Use the **Edit Comments** dialog box to enter or view comments about an agent's schedule for the selected day in the **Scenario Intra-Day** or **Agent-Extended** view. To open this dialog box:

- Double-click the **Comments** cell in the column labeled ***** for the appropriate agent.

The **Comments** column is visible only if you select it on the Columns tab of the **Options** dialog box.

This dialog box contains the following controls:

- **Comments**—Enter or edit comments in this text box.
- **OK**—Click this button to accept your changes and close the dialog box. The WFM database does not save your comments until you save the scenario.
- **Cancel**—Click this button to discard your changes and close the dialog box.

Important

Adding and editing comments changes the schedule. Therefore, when you save comments, WFM validates the schedule and relevant schedule warning messages appear. A schedule warning message generated when you first save the schedule scenario generates again when you save your comments if the schedule still contains the problems that were noted in the warning.

Scenario Intra-Day: Options Dialog Box

Use the **Options** dialog box to configure the data that is shown on the:

- Intra-Day view or Agent Extended view for the current scenario.
- Master Schedule Intra-Day or Master Schedule Agent-Extended view.

Opening the Options dialog

To open the **Options** dialog box:

1. Click **Options** on the **Actions** toolbar, or select **Options...** from the **Actions** menu.
   The **Option**s dialog box opens.
   - When called from an **Intra-Day** view, it has three tabs: **Options**, **Performance**, and **Columns**.
   - When called from an **Agent-Extended** view, it has two tabs: **Options** and **Columns**.

   Each tab is described below.
2. After you are done configuring the **Options** dialog box, click **OK** to save your changes, or **Cancel** to restore the original selections.

The **Options** dialog box closes and the view refreshes. The settings that you configure for a scenario or the **Master Schedule** appear whenever you return to the view for that scenario or for the **Master Schedule**, until you log off.

Configuring the options in the dialog

To configure options in this dialog box:

1. If you do not need the **Legend** to appear, you can clear the **Show Schedule Legend** check box to provide more space for the grid.
2. If you want to see agent availability on the grid, select the **Show Agent Availability** check box. Hours when an agent is unavailable are then shown in light gray on the grid.
3. Select the check box **Show agents with granted and scheduled rotating pattern** or any other calendar preference to see which schedule days contain such an item. The result: a red check box and **Agent** icon appears in the left-most column (labeled "!") for every **Agent** who meets these conditions.

> Tip

> You can use this tool to learn whether an agent was given a schedule based on a schedule preference, which might influence your decision to modify this agent's schedule. This icon is displayed only if the agent was given a rotating pattern or preference (such as for time off) as a result of building a schedule. If an agent's schedule is manually edited to give him or her a preference, or a schedule from a rotating pattern, then the icon will not be displayed.

4. Select the radio button for the hours you want to show, **24** to show 24 hours or **36** to show 36 hours.
5. Select the **Presentation** type: **Schedule only**, **Schedule on top**, or **Marked time on top**.
   Your selection affects the colored bars in the schedule. If **Schedule only** is selected, you cannot see **Marked time**.

Configuring the Performance tab

To configure the **Performance** tab (not available in **Agent-Extended** view):

1. If you select the Show Performance Information check box, you can further customize exactly what performance information WFM Web shows on the **Intra-Day Schedule** view.
   If you clear this check box, the rest of the options on this tab are disabled.
2. If you prefer not to see the legend that explains the colors used to distinguish performance data, clear the **Show Performance Legend** check box.
3. The **Update Automatically** check box determines whether schedule changes are shown when they happen.
   Clear this only if you have network bandwidth issues that make automatic updates a problem.
4. If you selected to view performance data, you can select the check boxes to show additional information in the performance table.

> ### Tip
> You see the table *only* if the **Full-Day View** check box is not selected.

In addition to scheduled coverage and calculated staffing, which always appear, you can select any or all of these ***Show additional data*** options to appear in the table:

- Required Staffing
- Difference between Coverage and Calculated Staffing
- Difference between Coverage and Required Staffing
- Scheduled Service Level Percentage
- Scheduled Deferred Service Level Percentage
- Scheduled ASA **(Average Speed of Answer)**
- Overtime Schedule (default: cleared)
- Overtime Requirement (default: cleared)

Important

If any of the cells in the **Difference in Calculated Staffing** or **Difference in Required Staffing** columns show as understaffed, WFM alerts the user by changing the color of the cell to red. Although red is the default color, you can change it, by using the settings in **About > Settings** (in the upper-right corner of the GUI).

Configuring the Columns tab

To configure the **Columns** tab:

- Select the check boxes for the optional columns that you want to display. Clear the check boxes for any columns that you want to hide. For **Intra-Day** and **Agent-Extended** views, you can add the following columns: **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Accessibility**, and **Comments**. In **Intra-Day** view, all columns are sortable, except for **Comments**. In **Agent-Extended** view, these columns are not sortable.

Scenario Intra-Day: Review Messages (Save) Dialog Box

Use this dialog box to respond to any warnings or errors that the server returned during your last attempt to save an agent's edited schedule.

The dialog box includes the following columns and controls:

Team Name	Displays the team to which this agent belongs.
Agent Name	Displays the agent whose schedule generated this message.
Messages	Displays the message type (either **Warning** or **Error**), numeric code, and the message text.
Action	Use each message's drop-down list to select an action to resolve the warning or error: • **Save**—Saves the edited agent schedule. This is the default action for warnings. It is unavailable for agent schedules whose edits generated errors (which are more severe than warnings). • **Fix Later**—Does not attempt to save the agent schedule, but keeps it in the **Intra-Day** grid so that you can further modify it. This is the default action for agent schedules whose edits generated errors. • **Do Not Save**—Discards the change that caused the warning or error to be generated.
OK	Closes the dialog box, applies your selected actions, and retrieves fresh data from the server.
Close	Closes the dialog box without saving or refreshing data.

These errors and warnings are generated by schedule changes that you made manually in the **Intra-Day** view. They differ from **Validation** warnings and errors, which WFM Web generates during the schedule building process.

Add/Remove Scenario Elements Wizard

Use the **Add/Remove Scenario Elements Wizard** to modify the selected scenario by adding activities or agents to it, or by removing agents. The wizard has the following screens:

- Select Actions
- Select Activities
- Filter by Contracts
- Add Agents
- Add Profile Agents based on Real Agents
- Add Profiles
- Remove Agents.

To use this wizard:

1. Click **Add/Remove Scenario Elements**  on a schedule scenario view's **Actions** toolbar or select it from the **Actions** menu.
   The wizard starts and opens the Select Action screen.

The **Add/Remove Scenario Elements Wizard** has seven screens (listed above), but depending on your choices, you might see fewer screens.

- Click **Help** on any screen opens a **Help** page that explains that screen's options.
- Click **Back** returns you to the previous screen, if you need to revise your entries there.

Add/Remove Scenario Elements: Select Actions

In the Add/Remove Scenario Elements Wizard **Select Action** screen:

1. Select a radio button from the group **Actions**:
   - **Add scenario elements**—Runs the Select Activities, Filter by Contracts, Add Agents, Add Profile Agents based on real agents, and Add Profiles screens, enabling you to add new activities and/or agents to the scenario.
   - **Remove agents from scenario**—Runs the Remove Agents screen, to remove agents from the scenario.
2. Click **Next** to proceed to the next screen.

Add/Remove Scenario Elements: Select Activities

In the Add/Remove Scenario Elements Wizard **Select Activities to Add** screen:

1. Select one or more activities from the **Activities** tree, which includes business units, sites, and activities.

   > **Tip**
   >
   > The tree displays only those sites that the scenario included when it was created, and by default, activities included in the selected scenario are selected in the tree, and you cannot clear their check boxes.

2. Select or clear (default) the **Additionally Filter Agents By Contracts** check box. If you select it, the Filter by Contracts screen is next.
3. Click **Next** to proceed to the next screen.

Add/Remove Scenario Elements: Filter by Contracts

In the Add/Remove Scenario Elements Wizard **Filter by Contracts** screen:

1. Select one or more contracts from the tree, which includes business units, sites, and contracts.

> **Tip**
> The tree shows only those sites that the scenario included when it was created, and by default, all contracts matching the activities that were selected on the Select Activities screen, are selected.

2. Click **Next** to proceed to the next screen.

Add/Remove Scenario Elements: Add Agents

In the Add/Remove Scenario Elements Wizard **Add Agents** screen:

1. Select one or more agents from the tree, which includes business units, sites, and agents.

> **Tip**
> The tree shows only those sites that the scenario included when it was created, and by default, all agents matching the activities that were selected on the Select Activities screen are selected.

2. Click **Next** to proceed to the next screen.

Add/Remove Scenario Elements: Add Profile Agents

In the Add/Remove Scenario Elements Wizard **Add Profile Agents based on Real Agents** screen agents are displayed in a tree, which is inside a table with these columns:

- **Agents**—Each agent's name.
- **Present**—The number of agent profiles, based on this real agent, that are already present in scenario. This number is read-only.
- **Add**—Select the check box in this column to add this agent's profile to the scenario. Clear the check box to not add the profile. As a short cut, you can select a single check box for any *branch* of the tree: business unit, site, team—to select all items below it.

To add profile agents, based on real agents:

1. Select or clear individual agent check boxes, as needed.
2. Select or clear the check box **Place Profile Agents, Based on Real Agents, Into Their Teams**.
3. Click **Next** to proceed to the next screen.

Add/Remove Scenario Elements: Add Profiles

In the Add/Remove Scenario Elements Wizard **Add Profiles** screen sites are displayed in a tree, which is inside a table with these columns:

- **Profiles**—Each profile's name.
- **Present**—The number of profiles, based on this contract, that are already present in scenario. (Read-only.)
- **Add**—The number of profiles of the type selected to add to the scenario. (Editable.)

To add profiles:

1. Display one or more profiles in the tree, which includes business units, sites, and profiles.
2. Select and edit numbers in the **Add** column, as needed.
3. Click **Finish** to save your changes to the schedule scenario.

Add/Remove Scenario Elements: Remove Agents

In the Add/Remove Scenario Elements Wizard **Remove Agents** screen:

1. Select the agent(s) to remove from a tree of business units, sites, teams, and agents.
2. Click **Finish**.

Scenario Agent-Extended View

Use the **Scenario Agent-Extended** view to display and/or edit a single agent's schedule for one week or for the schedule planning period. See the toolbar image here the button descriptions below.

> **Tip**
>
> A legend at the bottom of the window indicates the particular type of schedule item that each bar color represents.

You can modify schedule items for individual agents or profiles in this view, and insert schedule items for multiple agents and/or profiles.

Displaying the Scenario Agent-Extended View

To display the **Scenarios** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Schedule Scenarios table displays.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking **Open** ().
   The scenario's name appears on the toolbar, as a menu.

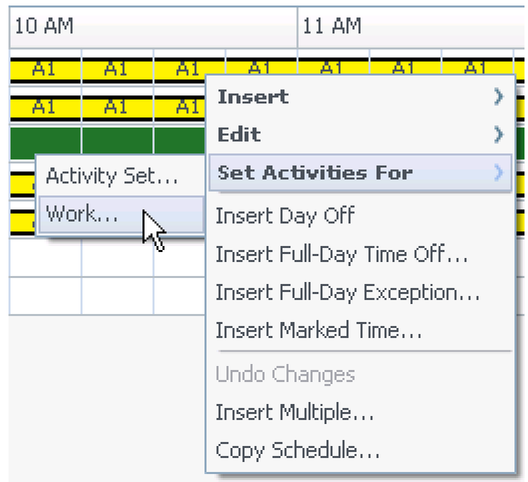
To display the open scenario's **Agent-Extended** view:

1. From the ***<scenario_name>*** menu on the toolbar, select **Agent Extended**.
2. In the Objects pane, select a single business unit, a single site within a business unit, or a single agent within a site.

Using the Scenario Agent-Extended View Grid

The **Agent-Extended** view includes a grid for the selected agent. Each row in the grid contains a color coded bar. Each bar represents a scheduled day or day off for the selected agent. The table below explains the fields and controls.

Scheduled agents	This indicator shows the number of agents displayed (based on the selected Mode).
Edited schedules	This indicator shows the number of daily schedules you have edited in this view, but not yet saved.
Full-Day View	Select the **Full-Day View** check box to have the grid display the entire day similar to the **Intra-Day** view. If you clear this check box, the grid shows a more detailed view.
Mode:	The starting **Mode** is set to the default of one week, but can be changed to **Schedule Planning Period** if schedule planning periods are used at your site.
Date:	These controls are the standard date selectors. The grid displays data for the period containing the selected date.
! *messages/warnings column*	This column contains icons that provide information about the agents' schedules. • A light-gray pencil icon indicates that the agent's day was edited after scheduling or rescheduling. • A green pencil icon indicates schedule items that you have changed but not yet saved. • A yellow pencil icon indicates an item that generated a warning and you selected the Fix Later option. • A red pencil icon indicates an item that generated an error. (Error conditions are more serious than warning conditions.) • A swap icon indicates that the agent's day was assigned by trading or swapping. • A yield icon (upside down red triangle) appears if there are pending changes. Pending changes must be committed by a user with **Approve Changes** security permission. Double-click a yellow or red icon to review message details and resolve the unsaved items.
Team	This column on the grid indicates the selected agent's assigned team.
colored icon	The column on the grid may display a colored icon, which represents the agent's contract.
Agent	This column on the grid indicates each agent's name.
Date	This column on the grid indicates the calendar day.
Weekday	This column on the grid indicates the day of the week. (Select **Day of Week** in the **Options >**

	Column tab.)
[Timesteps]	These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the Full-Day View check box and/or resize the columns. To make changes to the selected agent's schedule, right-click the timestep that you want to modify and then select the command from the shortcut menu. The figure below shows the menu when you right-click the dark blue area within a color-coded bar (unless you change the color). The menu items vary depending on the area clicked.  See Modify Individual Agent's Schedules for instructions and explanations.
[Horizontal scroll bar]	Appears below the table when clearing the Full-Day View check box causes some timesteps to be hidden off screen. Scroll it to the right to display later timesteps.
Legend	Indicates the particular type of schedule item that each bar color represents. 

Customizing the Scenario Agent-Extended View Grid

You can resize the **Team**, **Agent**, and **Date** columns. For details, see Getting Started. You can also add and remove columns.

Site Name	If displayed (using the Options dialog box), this column shows the name of the site for each agent on the selected day.
Shared Transport	If displayed (using the Options dialog box), this column shows the membership for each agent in Shared Transport group on the selected day.
Overtime	If displayed (using the Options dialog box), this

	column shows the duration of overtime for each agent on the selected day.
Paid Hours	If displayed (using the Options dialog box), this column shows each agent's paid hours for the selected day.
Total Hours	If displayed (using the Options dialog box), this column shows each agent's total hours for the selected day.
Start Time	If displayed (using the Options dialog box), this column shows each agent's start time for the selected day's work.
 **(Accessible Schedule Details)**	If displayed (using the Options dialog box), you can click this icon to display the Accessible Schedule Details dialog box, which simplifies and organizes commands for vision-impaired users and the screen readers that they use.
* (*Comment*)	If this column is displayed (using the Options dialog box), an asterisk (*) indicates that a comment was saved for the indicated agent and schedule day. Double-click a column cell to view or edit comments.

Using the Scenario Agent-Extended View Toolbar Buttons

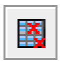
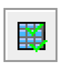
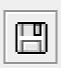
The **Scenario Agent-Extended** view toolbar is similar to the **Scenario Intra-Day** view toolbar. The only exception is that **Scenario Agent-Extended** view does not contain **Filter**, **Sort**, or **Meeting Scheduler** buttons. Click a button on the **Scenario Agent-Extended** view image to jump to its description.

Toolbar: Modifying an Agent's Schedule

Use buttons on the toolbar (or commands from the **Actions** menu) for the following:

Icon	Name	Description
	**Publish**	Opens the Publish Schedule Wizard, where you can publish a portion of the selected scenario to the **Master Schedule**, or extract a portion of the **Master Schedule** to the selected scenario.
	**Add/Remove scenario elements**	Opens the Add/Remove Scenario Elements Wizard, where you can add or remove activities and agents for the current schedule

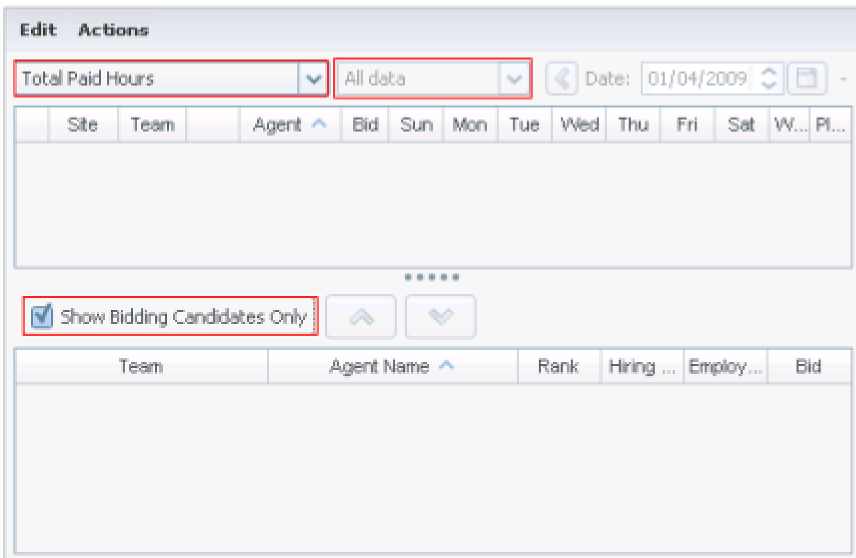
Icon	Name	Description
		scenario.
	**Build schedule**	Opens the Schedule Build Wizard, where you can build a complete schedule for the selected site.
	**Rebuild schedule**	Opens the Schedule Rebuild Wizard, where you can rebuild agent schedules, while optionally leaving intact any agent schedules that you have modified since the last build/rebuild.
	**Rebuild intra-day schedule**	Opens the Intra-day Schedule Rebuild Wizard to rebuild an **Intra-Day** schedule for a specific day or time period for a site, team, or agent.
	**Validate schedule**	Opens the Review Messages window, which lists scheduling warnings for a selected site. Warnings will only be visible if you have already built a schedule for this scenario and you saved any warnings that were generated.
	**Close**	Closes the open scenario (and prompts you to save unsaved data).
	**Options**	Opens the Options dialog box. Enables you to customize the view, including whether to show agent availability, whether to use a 24-hour or 36-hour display, and whether to display or hide the **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Comment**, **Site Name**, **Shared Transport**, and **Accessibility** columns.
	**Auto-Commit**	The **Auto-Commit** toolbar button toggles on and off the auto-commit feature. The feature is also turned on and off by selecting **Auto-Commit** on the **Actions** menu. If it is on, changes are immediately applied to the scenario. If it is off, the changes have pending status and can be committed/approved before they are incorporated in the publicly-available version of the schedule scenario.
	**Swap**	Opens the **Swap Agent Schedules Wizard**, which

Icon	Name	Description
		enables you to swap two agents' schedules.
	**Insert Multiple**	Opens the Insert Multiple Wizard, which enables you to insert breaks, meals, exceptions, days off, or vacation days for multiple agents or teams.
	**Delete Multiple**	Opens the Delete Multiple Wizard, which enables you to remove multiple items from the scenario at one time.
	**Edit Multiple**	Opens the Edit Multiple Wizard, which enables you to edit multiple items in the scenario at one time.
	**Commit/Rollback Multiple**	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes (changes entered when auto-commit was off) into the schedule scenario or to remove them and return the scenario to its former settings.
	**Save**	Saves any changes that you have made to the current scenario. (If the server cannot save all changes, red or yellow icons in the grid's first column indicate the agents for whom you must correct errors or acknowledge warnings. If you make schedule changes in the **Agent-Extended** view and do not click **Save**, you are prompted to save your changes when you select a different module or view, or when you launch certain wizards or child windows.
	**Move to Current Day**	Also known as the *Today* button. Click this button to display data for today.

Scenario Profiles/Bidding View

Use the **Scenario Profiles/Bidding** view to assign agents to a schedule that you have created using profiles. See the toolbar image here and the button descriptions below.

Bidding controls and tools are described at the bottom of this topic.



Using Profile-based Scheduling for Bidding Scenarios

WFM offers **Schedule Bidding**. This view offers controls you can use to:

- Assign agents to a bidding scenario before bidding starts.
- Set the start and end dates for bidding.
- Start the auto-assignment process, to assign agents to schedules, after bidding is closed.

These tools are a key portion of WFM's Schedule Bidding functionality.

Using Profile-based Scheduling for Advance Planning

You can use a profile-based schedule to plan for and schedule agents who you have not yet hired.

1. Configure and build your scenario(s) using profiles with the characteristics of your not-yet-hired agents.
2. Once the real agents are on board, assign them to the profile schedules.

Displaying the Scenario Profiles/Bidding View

To display the **Scenarios** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Schedule Scenarios table appears.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking **Open** .
   The scenario's name appears on the toolbar, as a menu.

To display the open scenario's **Profiles/Bidding** view:

1. From the scenario_name menu on the toolbar, select **Profiles/Bidding**.
2. In the Objects pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.

You can expand business units to display their sites and expand sites to display their profiles. You can select multiple sites, teams, and profiles, but just one business unit. You can select or remove all of a site's profiles by selecting or clearing (respectively) the check box beside the site node.

Reading the Tables

This view includes two tables, arranged vertically. Each table displays a vertical scroll bar (when required), which you can use to reveal additional rows. You can also give one table additional room by clicking and dragging the divider bar between the two tables.

The upper table displays a list of profile schedules, identified by a contract icon and by an index number (each of which is unique within the scenario). This table has the following columns:

Icons and columns	Description
◢ (*line is expanded*)	Click this icon to collapse a multiple-line listing to a single line.
▷ (*line is collapsed*)	Click this icon to expand a single-line listing to multiple lines.
Site	The assigned site of the agent in this row. You can show or hide this column using the **Options** toolbar button.

Icons and columns	Description
Team	The assigned team of the agent on this row.
	This icon represents the agent's contract.
Agent	Shows an index.
Bid	The agent's bid ranking number for this schedule. You can show or hide this column using the **Options** toolbar button.
[Weekdays]	Shows profile schedule information for the specific day. (The cells' contents correspond to your selection in the **Show Data for** drop-down list.)
Weekly Totals	To the right of each week, the total hours in that week (sum of all days). If there is more than one total, the sum of all totals appears above them.
Planning Period Totals	The total hours of all weeks in the **Planning Period**.

The lower table displays a list of real agents, with the following columns: **Team**, **Agent Name**, **Rank**, **Hiring Date**, **Employee ID**, and **Bid**.

Each row displays information for one agent. Each agent listed meets all the requirements imposed by the icon Show Assigned Agents and the check box Show Bidding Candidates Only.

Team	The assigned team of the agent on this row.
Agent name	The name of the agent on this row being documented in this row.
Rank	The agent's rank, if one exists.
Hiring Date	The agent's hiring date.
Employee ID	The agent's employee ID.
Bid	The agent's bid ranking number for this schedule.

Using the Tables

To assign a real agent to a profile schedule slot:

1. Click a profile schedule in the upper table.
   This populates the lower table with any real agents who are eligible to fill this slot. WFM Web presents agents who share the selected profile's contract, and who have the skills necessary to handle all of the profile's activities.
2. Click a real agent in the lower table.
3. Click  .
   In the upper table, the real agent's name replaces the selected schedule's index.

To remove an assignment:

1. Click the assigned agent in the upper table.
2. Click  .
   A numbered profile replaces the agent's name in the upper table. The agent's name reappears in the lower table.

To remove a profile slot from the upper table:

- In the **Objects** tree, clear that profile's check box.

Show Data For

Use this drop-down list to select what you want to display inside each day's table cell:

Total Paid Hours	Total working time for the day. (Default display option.)
Working Start/End Time	Start and end times of agents' work.
Shift or Schedule State Names	Names of agents' assigned shifts.

Mode

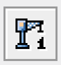
Use this drop-down list to select what you want to display in the table:

All data	Displays all profile schedules for the scenario period defined by **Start Date** and **End Date**. Includes columns for **Weekly Period Totals** and **Planning Period Totals**.
Planning Period	Displays all profile schedules for the entire **Planning Period**. Includes columns for **Weekly Period Totals** and **Planning Period Totals** for each profile schedule.

Filter, Build, Validate, Bidding Configuration and Save Options

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu):

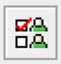
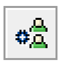
Icon	Name	Description
	**Publish**	Opens the Publish Schedule Wizard, where you can publish a portion of the selected scenario to the Master Schedule, or extract a portion of the Master Schedule to the selected scenario.

Icon	Name	Description
	**Add/Remove schedule elements**	Opens the Add/Remove Schedule Elements Wizard, where you can add activities, and add or remove agents, for the current schedule scenario.
	**Build schedule**	Opens the Schedule Build Wizard, which builds a complete schedule for the selected site.
	**Rebuild schedule**	Opens the Schedule Rebuild Wizard, where you can modify and rebuild schedules, while optionally leaving intact any agent schedules that you have edited since the last build/rebuild.
	**Rebuild Intra-day schedule**	Opens the Schedule Intra-day Rebuild Wizard, where you can modify and rebuild intra-day schedules.
	**Validate schedule**	Opens the Review Messages window, which lists scheduling warnings for a selected site. Warnings will only be visible if you have already built a schedule for this scenario and saved any warnings that were generated.
	**Close**	Closes the open scenario (and prompts you to save unsaved data).
	**Options**	Opens the Bid Options dialog, where you can choose to display or hide these columns in the upper table: **Bid**, **Site**.
	**Filter**	Enables you to filter the displayed contract types and activities.
	**Sort**	Opens the Sorting dialog box. Here you can sort schedules by **Site name**, **Team Name**, **Contract**, **Agent Name** (first or last), or Agent **Rank**. You can then sort agents by **First name** or **Last name**, and you can sort the entire list by ascending or descending order. Tip **Agent Rank** sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank.

Bidding Scenario Tools in this View

Use these controls to assign agents to a bidding scenario before bidding starts; to set the start and end dates for bidding; and to start the auto-assignment process to assign agents to schedules, after bidding is closed.

Icons

Icon	Name	Description
	Select Bidding Candidates	Opens the Select Bidding Candidates dialog, where you specify which Agents can bid on the current bidding scenario.
	Control Bidding Process	Opens the Control Bidding Process wizard, where you specify the Start and End dates for the current bidding scenario.
	Auto-Assign Schedules	Opens the Auto-assignment wizard, where you initiate the auto-assignment process that assigns bid-upon profile schedules to real agents.
	**Show assigned agents**	Displays real agents and their assigned shifts in the grid, only if the schedule was originally created using agent profiles. Otherwise selecting has no effect.
	Associate/Separate Teams	Opens the Associate/Separate Teams wizard.

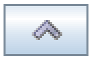
All other icons and modules are described in the Scenario Intra-Day View and the Scenario Agent-Extended View.

Check Box

- **Show bidding candidates only**—Controls which agents are listed in the bottom pane. Select this check box to display (in the bottom pane) only agents who can bid on the profile schedule selected in the top pane. Clear this check box to display (in the bottom pane) all agents at the **Site** who qualify for the profile schedule selected in the top pane.
  - When you use this view for schedule bidding, check the check box.
  - When you use this view for profile-based scheduling, clear the check box.

Arrows

Use these arrows to manually assign real agents to profile shifts or to unassign them.

-  (*up arrow*)—Assigns a real agent to the selected profile shift. To use this function:

1. Highlight a profile shift in the upper grid.
2. Highlight a real agent in the eligible list below.
3. Click the up arrow to assign the real agent to the profile shift.

The profile shift you selected becomes a real agent shift and the real agent disappears from the eligible list below.

-  (*down arrow*)—Unassigns a real agent from the selected shift. To use this function:

1. Select a real agent shift in the upper grid.
2. Click the down arrow to unassign the shift.

The shift you selected becomes a profile shift (now available for assignment) and the real agent appears in the eligible list below.

Options Dialog Box (Scenario Profiles/ Bidding View)

Use the **Options** dialog box to specify the columns that the **Scenario Profiles/Bidding** view displays.

1. On the **Scenario Profiles/Bidding** view's **Actions** toolbar, click the **Options** button.
   The **Options** dialog box opens.

   > **Tip**
   > All check boxes are selected by default.

2. Clear the check boxes for the items that you want excluded from the display.
3. Click **OK** to apply your choices.

Scenario Summary View

Use the **Scenario Summary** view to display statistics about the current schedule scenario. See the toolbar image here and the button descriptions below.

The **Summary** view provides standard date-selection controls and two data panes: a graph and a table.

Displaying the Scenario Summary View

To display the Scenarios view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Schedule Scenarios table appears.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking Open
   
   .
   The scenario's name appears on the toolbar, as a menu.

To display the open scenario's **Summary** view:

1. From the ***<scenario_name>*** menu on the toolbar, select **Summary**.
2. In the Objects pane, select the appropriate item from the **Activities** tree.

You can select a single business unit, a single site within a business unit, a multi-site activity, an activity group, or a single activity within a site. Making the selection populates the **Data** grid.

Setting Granularity

Use this drop-down list to select the **Time Step** increment to display in the grid. Select from one of these three values (in minutes): **15**, **30**, or **60**.

Graph and Data Panes

This view displays its data in a graph (upper portion of the view) and a table (lower portion), instead of on separate tabs.

Graph Pane

The **Graph** pane provides a linear graph for each statistic that you select, with data points for individual timesteps across the selected day.

Show data for

From the **Show data for** drop-down list:

1. Select the statistic you want to graph.
   The options correspond to the Data grid's available columns (except that **Difference Calculated** and **Difference Required** cannot be graphed).
2. Select the **Show Required** check box to display that data on the graph.

Graph

The graph is redrawn to match your drop-down list selection from the **Show data for** drop-down list. *Timesteps* are shown from left to right. Quantities from bottom to top show the number of interactions, the number of agents, or the expense amount (for **Budget**).

Data Table

The **Data** pane provides a scrollable grid that displays aggregate and per-timestep statistics. The grid's first row displays a daily total or average for each statistic. Each of the remaining rows displays statistics for one timestep.

Grid Columns

The grid provides columns that display the following statistics and quantities.

- Click the Options button to display or hide each of these available columns.

Column	Description
Time Step	The start time for each timestep, configured by the Granularity setting.
Coverage [Scheduled]	The scheduled staffing coverage for an activity or multi-site activity. Schedule coverage is calculated and displayed in fractional units. For example, if any agent is scheduled to work on three **Activities** in a 15-minute timestep, that agent may count as 1/3 toward the coverage of each activity.

Column	Description
	The way the scheduling engine splits an agent’s time among the activities the agent can work on depends on many factors. Examples include the open hours of each activity, the volume and handle time of each activity, and some other factors such as whether an agent has granted items in the **Calendar**, such as time off or exceptions for any or part of the day.
Headcount [Scheduled]	The number of agents scheduled (agents scheduled to be seated).
Service Level Percentage Scheduled	The service level percentage that can be achieved given the staffing coverage—assuming that other planned metrics (such as interaction volumes and **Average Handling Time**) remain unchanged.
Service Level Percentage Forecasted	The service level percentage that can be expected to be achieved based on the number of agents forecast. This may differ than the original service level objective that was stated when the staffing forecast was built due to agent rounding. For example, WFM may forecast a staffing requirement of 12 agents to meet a service level objective of 80% of interactions answered within 20 seconds, but **Service Level Percentage Forecast** may report a higher number, such as 83.48%. This is because 12 was the minimum number of agents required to meet the 80% service level objective but, with that number of agents, the contact center can be expected to achieve a slightly better service level than 80%. With one less agent (11 agents), the contact center would not be expected to achieve the 80% service level.
Interaction Volume Scheduled	The number of interactions that can be handled based on the schedule coverage—assuming that other planned metrics remain unchanged.
Interaction Volume Forecasted	The expected number of interactions, according to the **Master Forecast**.
AHT Scheduled	The **Average Handling Time** per interaction, based on the schedule—assuming that other planned metrics remain unchanged.
AHT Forecasted	The expected **Average Handling Time**, according to the **Master Forecast**.
Budget Scheduled	The budget for the scheduled coverage for the selected day and timesteps, based on the full-time-equivalent (FTE) paid hours per day and the salary specified in the **Forecast** scenario that was published to the Master Forecast for this date. (This statistic appears only if you have the access rights to view agents' wage fields.)
Budget Forecasted	The budget for the calculated staffing for the selected day and timesteps, based on the full-time-equivalent paid hours per day and the salary specified in the Forecast scenario that was published to the **Master Forecast** for this date. (This statistic appears only if you have access rights to view agents' wage fields.)

Column	Description
Staffing Calculated	The required number of agents as calculated by WFM, based on the forecast interaction volumes, AHT, and applicable service objectives.
Staffing Required	Optional field. The required number of agents as defined by the user, either by explicitly entering forecast targets or by using a template.
Difference Calculated	The difference between **Coverage [Scheduled]** and **Staffing Calculated**.
Difference Required	Optional field. The difference between **Coverage [Scheduled]** and **Staffing Required**.
ASA Scheduled	Optional field. The **Average Speed of Answer** that you should achieve on this activity, with the number of agents currently scheduled for this activity.
ASA Forecasted	Optional field. The totals/average row for **ASA Forecast** reports a weighted average, calculated across the open hours and weighted by **Forecast IV**
Deferred Service Level Scheduled	Optional field. The service level percentage that can be achieved given the deferred staffing coverage—assuming that other planned metrics (such as interaction volumes and **Average Handling Time**) remain unchanged.
Deferred Service Level Forecasted	Optional field. The service level percentage that can be expected to be achieved, based on the number of deferred activities forecast.
Deferred Service Level Difference [Scheduled minus Forecasted]	Optional field. The difference between the **Scheduled Deferred Service Level** and **Forecasted Deferred Service Level** statistics.
Scheduled Queue	The scheduled number of interactions in the backlog queue at the end of the period.
Difference [ASA Scheduled minus ASA Forecasted]	Optional field. **ASA Scheduled** minus **ASA Forecasted**
Occupancy Scheduled	Optional field. The Occupancy that you should achieve on this activity, with the number of agents currently scheduled.
Occupancy Forecasted	Optional field. The **Occupancy** objective that you should be able to achieve when staffing with the number of agents from the staffing forecast
Difference [Occupancy Scheduled minus Occupancy Forecasted]	Optional field. **Occupancy Scheduled** minus **Occupancy Forecasted**
Difference [S/L Scheduled minus S/L Forecasted]	Optional field. **S/L Scheduled** minus **S/L Forecasted**
Difference [IV Scheduled minus IV Forecasted]	Optional field. **IV Scheduled** minus **IV Forecasted**
Difference [AHT Scheduled minus AHT Forecasted]	Optional field. **AHT Scheduled** minus **AHT Forecasted**

Column	Description
Difference [Budget Scheduled minus Budget Forecasted]	Optional field. **Budget Scheduled** minus **Budget Forecasted**

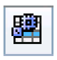
Important

You can display staffing totals in **FTE** or man-hours mode in the **Schedule coverage**, **Calculated staffing**, **Required staffing**, and other columns in the **Scenario Summary** view by adjusting the view settings in the interface. To change the display mode, see Changing the Staffing Display from FTE to Man Hours.

Using the Actions Toolbar

Use buttons on the toolbar (or commands from the **Actions** menu) for the following:

Icon	Name	Description
	**Publish**	Opens the Publish Schedule Wizard, where you can publish a portion of the selected scenario to the **Master Schedule**, or extract a portion of the **Master Schedule** to the selected scenario.
	**Add/remove scenario elements**	Opens the Add/Remove Schedule Elements Wizard, where you can add activities and agents to, or remove them from, the current schedule scenario.
	**Build schedule**	Opens the Schedule Build Wizard, where you can build a complete schedule for the selected site.
	**Rebuild schedule**	Opens the Schedule Rebuild Wizard, where you can modify and rebuild schedules, while optionally leaving intact any agent schedules that you have edited since the last build/rebuild.
	**Validate schedule**	Opens the Review Messages window, which lists scheduling warnings for a selected site. Warnings will only be visible if you have already built a schedule for this scenario and saved any warnings that were generated.

Icon	Name	Description
	**Close**	Closes the open scenario (and prompts you to save unsaved data).
	**Options**	Opens the Options dialog box for enabling or hiding individual statistics.
	**Use Multi-Site Activities**	This button becomes enabled when you select a multi-site activity or business unit in the Objects tree. Clicking this button displays data for the selected multi-site activity. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Scenario State Group Totals

Use the **Scenario State Group Totals** view to display coverage statistics for every time step in a selected day. Also, you can select agents with specific scheduled states who are contributing to a specific shrinkage types and display their schedules in the Intra-Day view. See Selecting Agents Contributing to Specific Shrinkage.

See the toolbar image here and the button descriptions below.

Displaying State Group Totals

To open the Scenarios view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Schedule Scenarios table displays.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking **Open**  .
   The scenario's name displays on the toolbar, as a menu.

To display the open scenario's **State Group Totals** view:

1. From the ***<scenario_name>*** menu on the toolbar, select **State Group Totals**.
2. In the **Objects** pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below).
   WFM then selects matching item(s) from the other tree.
3. Click **Get data**.

The columns in the scenario **Schedule State Group Totals** data table, and the stacked lines in the graph, correspond to the configured schedule state groups. Select **Filter**  in the toolbar, and use the **Schedule States** tab to specify which columns appear in the table and which lines appear in the graph.

Changing the Default Time Zone for Schedule State Totals

When displaying schedule state totals, if you select agents from the several sites, WFM uses the business unit's time zone by default. If you select agents from only one site, WFM uses the site time zone by default. However, in the **State Group Totals** view, selecting **Show data for**, enables you change the default time zone by selecting a different one, by clicking the **Time Zone** drop-down list.

Tip

To see the **View Intra-Day Schedule** context menu in step 4 in the next two procedures, you must right-click a cell with a value other than `0`.

Selecting Agents Contributing to Specific Shrinkage

1. In the **Scenarios** view, open a scenario.
2. Click the scenario name and select **State Group Totals**.
   The Show data for field is populated with Schedule States Totals by default (do not change it).
3. Select a business unit, site, and activities and click **Get Data**.
4. Right-click any cell that contains a value.
5. Click the **View Intra-Day Schedule** context menu.
   A list of agents who are contributing to the shrinkage is displayed.
6. Select the agents whose schedule you want to view.
7. Optionally, check the box **Open Intra-day schedule in a new window**, and click **OK**.
   This opens the Intra-Day view in a separate window, leaving the the Schedule State Totals view open behind it.
8. Or, leave the box **Open Intra-day schedule in a new window** unchecked, and click **OK**.
   The Intra-Day view opens, replacing the Schedule State Totals view.

The Intra-Day view now shows the selected agents' schedules.

Viewing State Group Totals Grouped by Name

1. In the **Scenarios** view, open a scenario.
2. Click the scenario name and select **State Group Totals**.
   The Show data for field is populated with Schedule States Totals by default (do not change it).
3. Select a business unit, site, and activities and click **Get Data**.
4. Click the **Group by names** check box.
   When this check box is selected, and there are Schedule State Groups with the same name under different sites, WFM displays their schedule state group totals in a single column with the same name.
5. Right-click any cell that contains a value.
6. Click the **View Intra-Day Schedule** context menu.

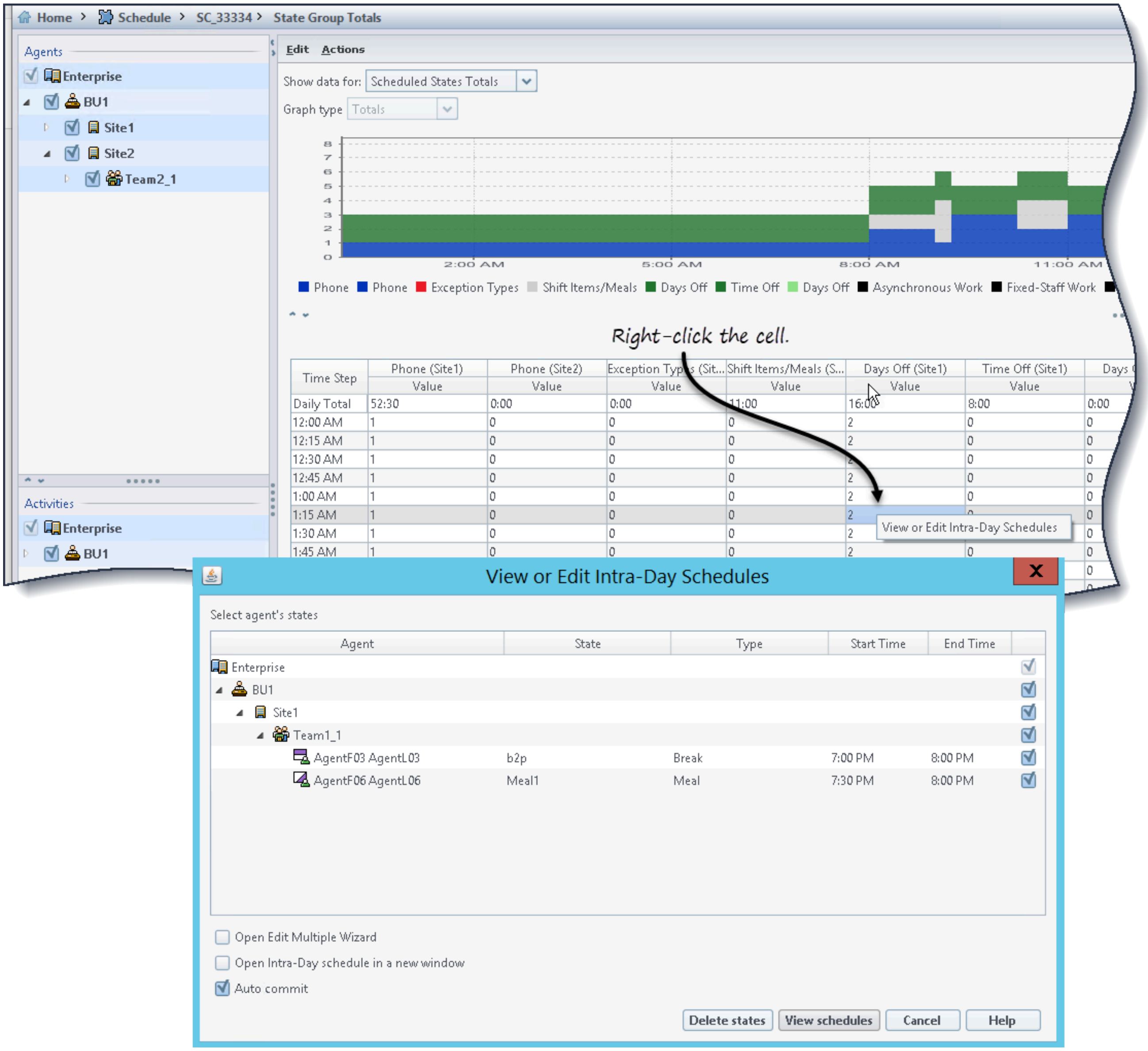
A list of the agents is displayed.

7. Select the agents whose schedule you want to view.
The Intra-Day view opens, replacing the Schedule State Totals view.

The Intra-Day view now shows the selected agents' schedules.

Viewing and Editing Agents' Intra-Day Schedules

Use this procedure to view and edit multiple agents' schedules in the Intra-Day schedule or select multiple agents who are contributing to schedule shrinkage.



To view and edit agents' schedules:

1. In the data pane of an open scenario, select the time step or row for the schedule state you want to edit.
   The View or Edit Intra-Day Schedules Wizard opens with all agent states selected, by default.
2. Select/deselect agent states, as needed, and then:
   - Click **View schedules** to open the agents' Intra-Day schedule.
   - Click **Delete states** to delete the select agents' states.
   - Click **Cancel** to cancel the action and close the wizard.

3. Optionally, you can use the following check boxes:
    - **Open Edit Multiple Wizard**—Opens the wizard and the Intra-Day schedule after you click **View schedules**. See the Edit Multiple Wizard.
    - **Open Intra-Day schedule in a new window**—Opens the agents' Intra-Day schedule in a separate window after you click **View schedules**.
    - **Auto commit**—Automatically commits the changes to the schedule. This box is checked, by default. Unchecking this box indicates that changes will be committed to the schedule manually.

> Tip
> When using the Edit Multiple Wizard, you cannot cannot edit or delete the following state types: Activity, Day Off, Full-Day Exception, or Full-Day Time Off.

Graph and Data Panes

This view displays its data in a graph (upper portion of the view) and a table (lower portion), instead of on separate tabs. You can also specify that WFM display its data not only for days, but also for weeks and months.

Both data displays show the differences between the schedule and the forecast, for each timestep during the selected time period. The **Graph** also shows totals as a flat line, because the lines representing forecasted and scheduled shrinkage can be of different shapes.

Graph

The groups are sorted by their weight descending and their name ascending. For example, the group with the highest weight is layered first, at the bottom of the chart.

The graph’s legend displays the names of each schedule state group in its matching color.

Graph Type *drop-down menu*	Select a display scheme for this view's graphical data. (This menu is disabled and reset to the default choice if the **Scheduled States Totals** value is selected in the **Show data for:** drop-down menu).
Period	Select the period for which the schedule state group is applicable; **Planning Period**, **Month**, **Week**, or **Day**.
Totals	Displays the data in a line graph, showing stacked schedule state group information. Default. If the Show Coverage and Forecast Information toolbar icon is toggled on, the graph displays this data as separate lines: **Schedule Coverage**, **Forecasted Staffing Calculated**, and **Forecasted Staffing Required**.

Comparison	Displays percentage data for a specific schedule state group or for planned / unplanned overheads, in a line graph that compares it to forecast-overheads data. The graph displays two percentage-data series as lines in the format that you select in the drop-down menu Targets. If the Show Coverage and Forecast Information toolbar icon is toggled on, the graph displays two additional data series of forecast data for the object(s) that you selected in the **Objects** pane.
Variance	Displays a bar graph representing differences between schedule and forecast, including shrinkage information. **Variance** appears only if the Show Coverage and Forecast Information toolbar icon is toggled on.
Targets *drop-down menu*	Appears only when the **Graph Type** menu selection is Comparison. Use it to select percentage data to compare. Select a format for comparing percentage data:
Total Planned	Displays scheduled planned overheads totals data and forecasted total planned overhead data. Not available if the selected value in the **Show data for:** menu is **Unplanned Overheads**.
Total Unplanned	Display scheduled unplanned overheads totals data and forecasted total unplanned overhead data. Not available if the selected value in the Show data for: menu is Planned Overheads.
list of schedule state groups	Displays a line graph of data for the named **Schedule State Group**. Names in this list are followed by a site name, if more than one site is selected in the **Objects** pane. The **Schedule State Groups** list depends on the selection in **Show data for:** menu. If you selected **Planned Overheads** in the menu, then only planned **Schedule State Groups** display in the list. If you selected **Unplanned Overheads**, then only unplanned **Schedule State Groups** display.

Data Table

In the **Data** table, the group columns are ordered with the highest weight displayed in the left-most column of the grid.

> **Important**
>
> An agent who is in multiple schedule state groups during an interval, is pro-rated in the grid by the fraction of the interval that the agent is in each state group. For example, an agent who is on break for 5 minutes and at work for 10 minutes is listed in the **Break** cell as `.33` and in the **Work** cell as `.67`.

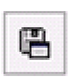
Show data for: *drop-down menu*	Select from the menu a data-display scheme to apply to the grid: • **Scheduled States Totals**—Displays totals for the schedule state groups of the currently selected agents, regardless of type. Select this option to disable the check boxes described below, and to display the data in grid columns that are selected in the **Schedule States** tab of the **Filter** dialog box. • **Total Shrinkage**—Displays totals for all schedule state groups (except ***<none>***) for the currently selected agents. Select this option to display the data in grid columns for the current scenario and the grand total, and subcolumns that match the selected check boxes below. • **Planned Overheads**—Displays planned overheads total for all selected agents. Select to display the data in grid columns for the current scenario and the grand total, and subcolumns that match the selected check boxes below. • **Unplanned Overheads**—Displays unplanned overheads total for all selected agents. Select to display the data grid columns for the current scenario and the grand total, and sub-columns that match the selected check boxes below. Each data-display scheme includes a **Time Step** column.
Grouped by name *check box*	Select this check box to group the agents by name when displaying schedule state totals.
Value *check box*	Select this check box to display the column that shows coverage value in the grid. This check box is disabled but checked if you selected **Scheduled States Totals** in the **Show data for:** menu.
Value % *check box*	Select this check box to display the column that shows coverage percentage in the grid. The percentage value is calculated relative to the grand total. This check box is disabled and not checked if you selected **Scheduled States Totals** in the **Show data for:** menu.
Compare with forecast *check box*	Select this check box to display the column that shows percentage data of overhead from the forecast in the grid, shall be presented in grid. This check box is enabled and applicable only if the same conditions are met as for the toggle action Show Coverage and Forecast Information. This check box is disabled and not checked if you select **Scheduled States Totals** in the **Show data for:** menu.

Value *cells*	Right-click in any cell (with a value other than zero) to open the View Intra-Day Schedule context menu.

Using the Actions Toolbar

Use buttons on the toolbar (or commands from the **Actions** menu) for the following:

Icon	Name	Description
	**Time Zone**	In the **State Group Totals** view, when showing data for schedule state totals, use this drop-down list to change the default time zone by selecting a different one.
	**Publish**	Opens the Publish Schedule Wizard, where you can publish a portion of the selected scenario to the **Master Schedule**, or extract a portion of the **Master Schedule** to the selected scenario.
	**Add/remove scenario elements**	Opens the Add/Remove Schedule Elements Wizard, where you can add activities and agents to, or remove them from, the current schedule scenario.
	**Build schedule**	Opens the Schedule Build Wizard, where you can build a complete schedule for the selected site.
	**Rebuild schedule**	Opens the Schedule Rebuild Wizard, where you can modify and rebuild schedules, while optionally leaving intact any agent schedules that you have edited since the last build/rebuild.
	**Validate schedule**	Opens the Review Messages window, which lists scheduling warnings for a selected site. Warnings will be visible only if you have already built a schedule for this scenario and saved any warnings that were generated.
	**Close**	Closes the open scenario (and prompts you to save unsaved data).
	**Show Coverage and Forecast Information**	This button is a toggle. Select it to present additional coverage and forecast information in the active view.

Icon	Name	Description
		Enabled only if any of these items are selected on the **Object** pane's activity tree: a single site activity, a single site, a single multi-site activity, or a single business unit.
	**Use Multi-Site Activities**	Enabled when you select a multi-site activity or business unit in the Objects tree. Clicking this button displays data for the selected multi-site activity. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Filter**	Opens the Schedule Filter dialog box. This icon is red when a filter is applied.
	**Options**	Opens the Options dialog box, where you can show or hide the columns **Total Planned** and **Total Unplanned** in the grid display; and change the colors that are used in **Coverage** and **Forecast** graphs.
	**Save as Template**	Saves the current selections as a **Forecast** template. Click this icon (or select the command from the **Actions** menu) to display the New Forecast Template dialog box. Required settings: **Graph Type**=**Comparison**, **Period**=**Week**.

Schedule Filter Dialog

Applies to these modules: **Weekly**, **Intra-Day**, **State Group Totals**, **Profiles/Bidding**.

Use the **Filter** dialog box to control the activities and contracts that are displayed within the selected site:

1. In any of these views— **Weekly**, **Intra-day**, **State Group Totals**, or **Profiles/Bidding**—click the **Filter** button on the **Actions** toolbar.
   The **Filter** dialog box opens.
2. Click the **Agent Properties** tab.
3. In the **Contracts** list, select the check boxes for contracts that you want to display, from a tree of BUs, sites, and contracts. Clear the check boxes for contracts that you want to hide.

   By default, all contracts are selected.
4. Select or clear the check box **Include agents with matching secondary skills**, to specify that the main view includes agents who also match according to their secondary skills and activities.

   > ## Tip
   > This check box is not available from the **Schedule State Group Totals** view.

5. Click the **Schedule States** tab.
6. To filter agents that will be displayed within the selected site:
   - If you are in the **Weekly**, **Intra-Day**, or **Profiles/Bidding** module, select **Filter Using Following Schedule States** and then, select one (or all four schedule states: **Activities**, **Meetings**, **Marked Time**, and **Shifts**). Each portion of this tree includes the current business unit, site(s), and the appropriate objects (activities, meetings, marked times, or shifts).
   - If you are in the **State Group Totals** module, this tab contains the **Schedule State Groups** list. Select the check boxes for groups that you want to display. Clear the check boxes for any groups that you want to hide. By default, all objects are selected.
7. Select the check boxes for objects that you want to display. Clear the check boxes for objects that you want to hide.
8. Click **OK**.

The view is now filtered according to your selection. If you have filtered a scenario view, this filter remains in effect until you close the scenario. However, if you select another site and then click the **Filter** button, the **Filter** dialog box reopens with its default settings.

Statuses Filter Dialog

Use the **Statuses Filters** dialog box to control which **Statuses** are displayed:

1. Select the check boxes for **Statuses** that you want to display.
   By default, all **Statuses** are selected for display.
2. Clear the check boxes for any activities that you want to hide.
3. You can select the **Statuses** at the top of the list to select the entire list at once.
4. Click **OK** to apply your selections, or **Cancel** to abandon them.

WFM filters the view according to your selections.

Options Dialog (Summary View)

Use the **Options** dialog box to customize the statistics that the **Summary** view displays.

1. Click **Options** on the **Summary** view's **Actions** toolbar.
   The **Options** dialog box opens.
2. Select the check boxes for statistics that you want to display, and clear the check boxes for statistics that you want to hide.

- Double-click the **Statistics node** to reveal its contained statistics.
- Select or clear all statistics at once by selecting or clearing (respectively) the **Statistics node's** check box.

- Click **OK**.

The Summary view reappears, displaying only the statistics that you selected.

Coverage Statistics

You have the option to include two **Coverage** statistics in the **Summary** view:

- **Coverage Published**—Displays the schedule coverage based on the *baseline* **Master Schedule**.
- **Coverage Scheduled**—Displays the schedule coverage based on the *current* **Master Schedule**.
- **Coverage Difference**—Displays the difference between the schedule coverage based on the *current* **Master Schedule** and schedule coverage based on the *baseline* **Master Schedule**.

Metrics

You have the option to include these **Difference** statistics in the **Summary** view:

- **Difference [S/L Scheduled minus S/L Forecasted]**—Displays (Service Level Scheduled minus Service Level Forecasted).
- **Difference [IV Scheduled minus IV Forecasted]**—Displays (Interaction Volume Scheduled minus Interaction Volume Forecasted).
- **Difference [AHT Scheduled minus AHT Forecasted]**—Displays (Average Handle Time Scheduled minus Average Handle Time Forecasted).
- **Difference [Budget Scheduled minus Budget Forecasted]**—Displays (Budget Scheduled minus Budget Forecasted).

You have the option to include these statistics in the **Summary** view:

- **AHT Forecasted**—Displays the expected Average Handling Time, according to the **Master Forecast**.
- **AHT Scheduled**—Displays the Average Handling Time per interaction, based on the schedule&emdash;assuming that other planned metrics remain unchanged.
- **ASA Scheduled**—Displays the Average Speed of Answer that would be expected with the number of scheduled agents.
- **ASA Forecasted**—Displays the Average Speed of Answer that would be expected with the number of agents from the staffing forecast.
- **Difference [ASA Scheduled minus ASA Forecasted]**—Displays (ASA Scheduled minus ASA Forecasted)
- **Budget Forecasted**—Displays the budget for the calculated staffing for the selected day and timesteps, based on the full-time-equivalent (FTE) paid hours per day and the salary specified in the **Forecast** scenario that was published to the **Master Forecast** for this date. (This statistic appears only if you have access rights to view agents' wage fields.)
- **Budget Scheduled**—Displays the budget for the scheduled coverage for the selected day and timesteps, based on the full-time-equivalent (FTE) paid hours per day and the salary specified in the **Forecast** scenario that was published to the **Master Forecast** for this date. (This statistic appears only if you have the access rights to view agents' wage fields.)
- **Deferred Service Level Difference [Scheduled minus Forecasted]**—Displays the difference between Scheduled Deferred Service Level and Forecasted Deferred Service Level statistics.
- **Deferred Service Level Forecasted**—Displays the service level percentage that can be expected to be achieved, based on the number of deferred activities forecasted.
- **Deferred Service Level Scheduled**—Displays the service level percentage that can be achieved given the deferred staffing coverage&emdash;assuming that other planned metrics (such as interaction volumes and Average Handling Time) remain unchanged.
- **Difference Calculated**—Displays the difference between Coverage [Scheduled] and Staffing Calculated.
- **Difference Required**—Displays the difference between Coverage [Scheduled] and Staffing Required. (Optional field.)
- **Headcount Scheduled**—Displays the number of agents scheduled (agents scheduled to be seated).
- **Interaction Volume Forecasted**—Displays the expected number of interactions, according to the **Master Forecast**.
- **Interaction Volume Scheduled**—Displays the number of interactions that can be handled based on the schedule coverage&emdash;assuming that other planned metrics remain unchanged.
- **Occupancy Forecasted**—Displays the Occupancy objective that you should be able to achieve when staffing with the number of agents from the staffing forecast.
- **Occupancy Scheduled**—Displays the Occupancy that you should achieve on this activity, with the number of agents currently scheduled.
- **Difference [Occupancy Scheduled minus Occupancy Forecasted]**—Displays (Occupancy Scheduled minus Occupancy Forecasted).
- **Scheduled Queue**—Displays the scheduled number of interactions in the backlog queue at the end of the period.
- **Service Level Forecasted**—Displays the service level percentage that can be expected to be achieved based on the number of agents forecasted.
- **Service Level Scheduled**—Displays the service level percentage that can be achieved given the

staffing coverage&emdash;assuming that other planned metrics (such as interaction volumes and Average Handling Time) remain unchanged.

- **Staffing Calculated**—Displays the required number of agents as calculated by WFM, based on the forecasted interaction volumes, AHT, and applicable service objectives.
- **Staffing Required**—Displays The required number of agents as defined by the user, either by explicitly entering forecast targets or by using a template. (Optional field.)

For in-depth descriptions of these statistics and the formulae used to derive them see "WFM Metrics" in the *Workforce Management Administrator's Guide*.

Background on Baseline Master Schedule

When you publish a schedule scenario to the **Master Schedule**, WFM retains a snapshot of the **Master Schedule** at that point in time. This is the *baseline* **Master Schedule**.

Then, after you or other schedulers make changes to the schedule such as adding exceptions and granting vacations, you can compare the schedule coverage shown in the *current* **Master Schedule** against the schedule coverage stored in the *baseline* **Master Schedule**.

This *baseline* of the **Master Schedule** is created/updated at the last time something was published to the **Master Schedule** for a particular date range. For example, assume on May 25 you publish the June schedule scenario to the **Master Schedule**, and then on May 28 you re-publish the same June schedule scenario to the **Master Schedule**. In this case, WFM uses the May 28 published schedule as the *baseline* against which the *current* schedule is compared.

Options Dialog (Weekly View)

Use the **Options** dialog box to configure the data that is shown on the **Weekly** view or **Master Weekly** view.

Use the **Options** dialog to configure the data that is shown on the **Weekly** view or **Master Weekly** view.

Open the **Options** dialog by clicking **Options** in the **Actions** toolbar or selecting **Options** in the **Actions** menu.

To configure options on the **Options** tab:

- Select the **Show agents with granted and scheduled rotating pattern or any other calendar preference** check box.

  When the check box is selected, the grid shows the schedule days that contain such an item. A red check box and **Agent** icon appears in the leftmost column (labeled "**!**") for every agent who meets these conditions.

> ## Tip
> You can use this tool to learn whether an agent was given a schedule based on a schedule preference, which might influence your decision to modify this agent's schedule. This icon is displayed only if the agent was given a rotating pattern or preference (such as for time off) as a result of building a schedule. If an agent’s schedule is manually edited to give him or her one of his or her preferences, or a schedule from a rotating pattern, then the icon will not be displayed.

To configure options on the **Columns** tab:

- Select **Agent Rank** to add a column to the **Weekly View** grid that displays an agent's **Rank value**.
- Select **Site Name** to display the **Site** column.

Swap Agent Schedules Wizard

Use the **Swap Agent Schedules Wizard** to swap the schedules of two agents in the same schedule scenario or Master Schedule:

> **Tip**
> When swapping shifts or schedules, select agents within the same site only

1. Click the **Swap** button on the **Actions** toolbar of an Intra-Day, Agent-Extended, or Weekly view.
   - For **Weekly** view, the **Select Date and First Agent** screen opens. Continue with Step 2.
   - For **Agent-Extended** or **Intra-Day** view:
     - If you previously selected an agent, the **Select Second Agent** screen opens. Continue with Step 5.
     - If you select no agent, the **Select Date and First Agent** screen opens. Continue with Step 2.
2. Select the **Start Date** and **End Date**.
   These dates must lie within the schedule scenario's date range.
3. From the **Select Agent** list, select the first agent.
   In this hierarchical list, you can expand business units to display sites, teams, and agents. You can select a single real or profile agent.
4. Click **Next**.
   The Wizard's second screen, Select Second Agent, opens.
5. From the **Select Agent to Swap with** list, select the agent with whom you want to swap schedules.
   You can select a single real or profile agent.
6. Click **Finish**.

If the swap is successful, the wizard closes and returns you to the view from which you opened it.

Sorting Dialog

Use the **Sorting** dialog box to sort the Weekly, Intra-Day, and Profile/Bidding views.

1. Select the item by which you want to sort. **Agent Name** is the default sort option.
   If agents do not have the option by which you are sorting, they appear last in the list.

- **Weekly view**—Team Name, Contract, Agent Name (first or last), Agent Rank, or Site Name. You can sort in ascending or descending order. Note that **Agent Rank** sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank.
- **Intra-Day view**—Site, Team, Contract, Agent (first or last), Shared Transport, Overtime, Paid Hours, Total Hours, Shift Start Time, Shift End Time, Shift, Start Time of First Exception.
- **Profile/Bidding view**—Site Name, Team Name, Agent Name (first or last), and Contract.

> **Important**
> If you select **Start Time of First Exception**, agents with full-day exceptions appear after agents with part-day exceptions. Agents with no exceptions appear at the bottom of the list.

- Click **Apply**.

The view is now sorted by the item that you selected. If you have sorted a scenario view, it retains this sort order until you close the scenario.

Review Swapping Messages

After you swap agent schedules, you might receive messages warning you that the swap results in constraint violations. For example, the new shift assignment might violate an agent's **Contract**.

If there are problems, the **Review Messages** dialog box opens. For each issue, the **Review Messages** dialog box shows the name of the affected agent and explains the problem.

After reviewing each entry in the list, do one of the following:

- Click **Perform Anyway** to make the swap in spite of the constraint violation(s).
- Click **Cancel** to cancel the swap and return the schedule to its former state.

Reviewing Messages

Use the **Review Messages** dialog box to view any warnings or errors that the server returned, in a variety of situations.

The dialog box contains the following columns and controls:

Team Name	The team to which the agent belongs.
Agent Name	The agent whose action(s) generated this message.
Date	The date that the messages was generated.
Messages	The message type (either Warning or Error), numeric code, and the message text.
Action	This drop-down menu presents three choices: **Save**, **Fix Later**, and **Do Not Save**.
Close	Closes the dialog box and does not retrieve fresh data from the server.
OK	Closes the dialog box and retrieves fresh data from the server.
Help	Displays this help topic.

Insert Multiple Wizard

Use the **Insert Multiple Wizard** (IMW) to add an item, such as a break, into multiple agents' schedules at once. You can use it in either **Scenarios** or the **Master Schedule**.

Using the Insert Multiple Wizard

To use the wizard:

1. In Intra-Day, Agent-Extended, or Weekly view, select **Insert Multiple**  from one of the following:
    - **Actions** toolbar
    - **Actions** menu
    - Right-clicking the **Shortcut** menu (not in **Weekly** view)
    The Select Activities screen opens. If you have unsaved changes, WFM Web prompts you to save them before proceeding.
2. Select one or more activities to insert.
   The Select Agents page opens.
3. Select the agents whose schedules you are editing. (Agents without skills are not displayed in the **Select Agents** page.)
4. Click **Next**.
5. Select the dates in which to insert items, and then click **Next**.
6. On the Select State Type page, select a state, and then click **Finish** (for a **Day Off**) or **Next** (for other schedule items).
7. Fill in the breaks, meals, exceptions, time off, shift, marked time, or work set selection page that appears next.
8. Click **Finish**.

When the view reappears:

- If the Auto-Commit inserted items check box was enabled, and you are editing a schedule scenario, your changes are committed to the scenario.
- If the **Auto-Commit inserted items** check box was not enabled and you are editing a schedule scenario, then your changes appear in the schedule in **Pending** mode. You must commit them or roll them back with the Commit/Rollback Multiple wizard.

Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published. If you are editing the **Master Schedule**, and the **Auto-Commit inserted items** check box is enabled, then the changes are committed to the **Master Schedule** are visible to all users.

Auto-Committing Inserted Items

In step 3 above, if you are using the **Insert Multiple** feature in one of the **Master Schedule** views and you have the **Approve Changes** security permission, you can select the **Auto-commit inserted items** check box to have your changes immediately inserted into the schedule. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any inserts that you make are pending, and they must be committed or approved before they can take effect in the official version of the **Master Schedule**.

If you are using one of the **Scenario** views, this check box is always enabled.

If the **Auto-Commit inserted items** check box is not enabled, then changes go into a **Pending** mode and appear to you, but not to other users, in the **Master Schedule** views. Pending changes in the Master Schedule must either be:

- Reviewed and approved/declined by a user with **Approve Changes** permissions (through the Master Schedule Changes Approval view) or
- Committed or rolled back by you, if you have **Approve Changes** permissions, through the Commit/ Rollback Multiple wizard.

IMW: Select Activities

To complete the **Select Activities** page in the Insert Multiple Wizard (IMW):

1. Select any combination of **multi-site activities** and **activities**.
   You can expand business units to display their multi-site activities and sites, and expand sites to display their activities. Only objects that were selected at the last time you clicked **Get data** are available. By default, all are selected.
2. Click **Next** to apply your selections and continue, or click **Cancel** to make no changes and close the wizard.

IMW: Select Agents

To fill in the **Select Agents** page in the **Insert Multiple Wizard** (IMW):

1. Select any combination of **agents**.
   You can select individual agents from multiple teams, or you can select whole teams or the whole site. Only objects that you had selected the last time you clicked **Get data** are available.
2. If you want, select **Insert only if there are no errors** and/or **Show warnings**.

   If you select the **Insert only if there are no errors** check box, then when you try to save the new items, WFM Web will not insert any of them if the server returns any schedule validation errors.

   If you select the **Show warnings** check box, WFM Web displays any schedule validation warnings that would be generated if the items were inserted into agents' schedules.

   > Tip
   >
   > If schedule validation errors also occur, WFM Web does not insert any of your changes into the schedule.

3. If you are editing the **Master Schedule** and have **Approve Changes** security permission, you can select the **Auto-Commit inserted items** check box to have your changes immediately inserted into the **Master Schedule**. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any inserts that you make are pending, and they must be reviewed and approved before they can take effect in the **Master Schedule**.

   If you are editing a schedule scenario, you have the option to select the **Auto-Commit inserted items** check box. If checked, your changes are committed to the schedule scenario. If not checked, your changes go into a **Pending** state. They can be committed or rolled back by you using the Commit/Rollback Multiple wizard. Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published.
4. Click **Next** to open the Select Dates page.
   Click **Cancel** if you want to close the wizard without saving your selection.

IMW: Select Dates

The **Select Dates** page in the **Insert Multiple Wizard** (IMW) contains a calendar.

1. Select the date or dates into which to insert the schedule items.

   The calendar works as described in How to Use the Calendar.

   > ## Tip
   > If you are inserting into a schedule scenario, you cannot select dates that fall outside of the scenario's date range.

2. Click **Next**.

   If you want to close the wizard without saving your selection, click **Cancel**.

IMW: Select State Type

To fill in the **Select State Type** page in the **Insert Multiple Wizard** (IMW):

1. Select the **state type** that you want to insert.
   If you selected agents from more than one site at the Select Agents page, then only these types are available Day Off, Exception, Time Off, Marked Time, and Work Set.
2. Click **Finish** or **Next** (to proceed to the next page).
   The button that is enabled depends on the state that you have selected
   - **Finish** *button*—Enabled if you select Day Off. Click it to insert a day off on the selected dates for the selected agents and close the wizard.
   - **Next** *button*—Enabled if you select any other state. Click it to open the appropriate wizard page for selecting breaks, meals, exceptions, time off, shift, marked time or work set.
3. To review or change your entries on the Select Dates page, click **Previous**.
   Or click **Cancel** to close the wizard without saving your selection.

IMW: Select Shift

To fill in the **Select Shift** page in the **Insert Multiple Wizard** (IMW):

1. Select the **shift** that you want to insert.
2. If the selected shift ends on the day after it begins, select **Next Day** next to the **End Time** text box.
3. Select the **Automatically Insert Meals and Breaks** check box to enable that function.
4. Click **Next** to open the **Select Activity Set** page.

IMW: Select Activity Set

To fill in the **Select Activity Set** page in the **Insert Multiple Wizard** (IMW):

1. Select the check box next to each **activity** that you want to insert.
2. Click **Finish**.

IMW: Select Break

To fill in the **Select Break** page **Insert Multiple Wizard** (IMW):

1. Select a **break** from the **Choose Item to Insert** list.
   - Click a single row to select its break. (If more breaks are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.) The list shows all of the breaks that have been configured for the selected site in WFM Web.
     The list's columns show each break's full name, short name, how long it lasts, and whether or not the break is paid. You cannot select or clear the Paid check box here.
2. Fill in the **Start time** and **End time** text boxes for this break.
   Type in the times that you want, or use the up or down arrows to modify the displayed times.
3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the break starts on the day after the agents' shifts begin.
   — or —
4. Select **Next Day** next to the **End Time** text box if the break begins on the same day as the agents' shifts begin, but ends on the day after.
5. Click **Finish** to insert the selected break and close the wizard.
   This returns you to the Intra-Day view.
   - If you want to review or change your entries in the Select State Type page, click **Previous**.
   - If you want to close the wizard without inserting the break, click **Cancel**.

IMW: Select Meal

To fill in the **Select Meal** page **Insert Multiple Wizard** (IMW):

1. Select a **meal** from the **Choose Item to Insert** list.
    - Click a single row to select its meal. (If more meals are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.) The list shows all of the meals that have been configured for the selected site in WFM Web.
    The list's columns show each meal's full name, short name, how long it lasts, and whether or not the meal is paid. You cannot select or clear the Paid check box here.
2. Fill in the **Start time** and **End time** text boxes for this meal.
   Type in the times that you want, or use the up or down arrows to modify the displayed times.
3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the meal starts on the day after the agents' shifts begin.
   — or —
4. Select **Next Day** next to the **End Time** text box if the meal begins on the same day as the agents' shifts begin, but ends on the day after.
5. Click **Finish** to insert the selected meal and close the wizard.
   This returns you to the Intra-Day view.
    - If you want to review or change your entries in the Select State Type page, click **Previous**.
    - If you want to close the wizard without inserting the meal, click **Cancel**.

IMW: Select Exception

To fill in the **Select Exception** page **Insert Multiple Wizard** (IMW):

1. Select a **exception** from the **Select Exception** list.
   - Click a single row to select its exception. (If more exception are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.) The list shows all of the exception that have been configured for the selected site **Policies** module of WFM Web.
     The list's columns show each exception's full name, short name, whether it is paid, whether it counts as time off, whether the exception is convertible to a day off, whether it is a full-day exception, and all sites to which it is assigned.

     > ## Tip
     > The check boxes simply indicate the exception's configured properties. You cannot select or clear them here.

2. If the **Start time** and **End time** text boxes are enabled, fill them in for this exception.
   Either type in the times that you want, or use the up or down arrows to modify the displayed times.
3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the exception starts on the day after the agents' shifts begin.
   — or —
4. Select **Next Day** next to the **End Time** text box if the exception begins on the same day as the agents' shifts begin, but ends on the day after.
   - If you selected a full-day, paid exception, you can select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a work day.
   - If you select the **Specify Paid Hours** check box, the **Paid Hours** text box becomes editable.
5. Click **Finish** to insert the selected exception and close the wizard.
   This returns you to the **Intra-Day** view.
   - If you want to review or change your entries in the Select State Type page, click **Previous**.
   - If you want to close the wizard without inserting the exception, click **Cancel**.

> ## Important
> WFM requests approval to insert new exceptions that overlap existing exceptions with this message for each exception/agent instance: *Warning: Newly inserted state Exception name (date & time) is replacing an existing state exception name (date & time) that it overlaps.*
>
> All requests appear in the Review Messages dialog box, where you can approve or reject each instance. This behavior applies only to part-day exceptions that overlap part-day exceptions; other instances (such as full-day exceptions) are still rejected.

IMW: Select Time Off

To fill in the **Select Time Off** page **Insert Multiple Wizard** (IMW):

1. Select a **time-off** type from the **Select Time Off** list.
   - Click a single row to select its time-off type. (If more time-off types are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)
     The list shows all of the time-off types that have been configured for the selected site in the **Policies** module of WFM Web.
     The list's columns show each time-off type's name, short name, whether or not the time off is paid, whether the time off counts toward the configured time-off limits, and all sites to which **Time Off** is assigned.
   - Select the **Show all** check box to display all **Time-Off** types.
     Clear the check box to display only the **Time-Off** types that are applicable to the selected agent.
     See the Time-Off Primer in the *Workforce Management Administrator's Guide*.

   > **Tip**
   > The **Paid** and **Counts** check boxes are informational only. You cannot select or clear them.

2. If the **time-off** item is part-day, fill in the **Start time** and **End time** text boxes. Type in the times that you want, or use the up or down arrows to modify the displayed times.
3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the time-off period starts on the day after the agents' shifts begin.
   — or —
4. Select **Next Day** next to the **End Time** text box if the time-off period begins on the same day as the agents' shifts begin, but ends on the day after.
5. If the time off is for the entire day, select the **Full Day** check box. This disables the start time and end time text boxes.
6. Click **Finish** to insert the selected time off and close the wizard.
   This returns you to the **Intra-Day** view.
   - If you want to review or change your entries in the Select State Type page, click **Previous**.
   - If you want to close the wizard without inserting the time off, click **Cancel**.

IMW: Select Marked Time

To fill in the **Select Marked Time** page in the **Insert Multiple Wizard** (IMW):

1. Select the **marked time** that you want to insert.
2. Adjust the **Start time** and **End time**, as necessary.
3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the marked time starts on the day after the agent's shifts begin.
   — or —
4. Select **Next Day** next to the **End Time** text box if the marked time begins on the same day as the agent's shifts begin, but ends on the day after.
5. Click **Finish**.

IMW: Select Work Set

In WFM, *work sets* are used to configure the time interval within the shift when agents are working only on specified activities. You can include several activities or a single activity set into a work set.

Insert work sets by using the steps described in the procedure below or by selecting it in the Intra-day view's pop-up menu (using a right-click, in the same way you insert other items, such as time off, exceptions, or marked time).

In the **Insert Multiple Wizard** (IMW), you select **Work sets** using 1 or 2 pages, depending on your choices:

- Specify work set parameters
- Select activities for work set screen

Specify Work Set Parameters Page

1. Select or enter the Start time and End times.
2. Select **Next Day** (next to the **Start Time** text box) if the work set starts on the day after the agent's shifts begin.
   — or —
   Select **Next Day** (next to the **End Time** text box) if the work set begins on the same day as the agent's shifts begin, but ends on the day after.
3. Select one of these radio buttons:
   - **Select new activities for Work Set**—Enables the Select activities for work set screen, where you select the new activities.
   - **Use existing shift activities**—Applies the activities already selected.
4. Select or clear the check box Mark as overtime with marked time.
   Select to enable the **Marked Time** page when you're done with activities.
5. Click **Next** (if you selected the radio button **Select new activities for Work Set** or the check box **Mark as overtime with marked time**) or click **Finish**.

Select Activities for Work Set Page

This page appears only if you selected the **Select new activities for Work Set** radio button.

1. Select one or more activities from the tree.
2. Click **Next** (if you selected the check box Mark as overtime with marked time in the previous page) or

click **Finish**.

Marked Time with Overtime

To fill in the **Select marked time with overtime** page in the **Insert Multiple Wizard** (IMW):

Important

This page in the wizard appears only if you checked the **Mark as overtime with marked time** check box on the Specify work set parameters page of this wizard.

1. Select a **Marked Time**.
2. Click **Finish**.
   If you want to close the wizard without inserting the marked time, click Cancel.

IMW: Review Messages

Use the **Review Messages** dialog box in the **Insert Multiple Wizard (IMW)** to respond to any warnings returned when you tried to save agents' edited schedules.

1. For each **Warning** that is listed, check the items you want to insert and then click **Insert for selected**.
   To select all **Warnings**, use the **Select All Warnings** check box.
2. Review all **Errors**.
   You cannot select the check box next to the **Error**.

To cancel out without applying any changes, click **Close.**

The **Review Messages** dialog box includes the following columns and controls:

Date	Displays the schedule date.
Agent	Displays the agent whose schedule generated this message.
Team	Displays the agent's team.
Message	Displays the message type (either **Warning** or **Error**), and the message text itself.
Select All Warnings	Marks the check box for all **Warnings**.
Insert For Selected	Closes the dialog box, applies your selected actions, and retrieves fresh data from the server.
Close	Closes the dialog box without saving or refreshing data.

Important

These errors and warnings are generated by schedule changes that you made manually in the **Agent-Extended**, **Intra-Day**, or **Weekly** view. They differ from Validation warnings and errors, which WFM Web generates during the schedule building process.

Edit Multiple Wizard

Use the Edit Multiple function to edit one or more items from agents' schedules at once. You can use the Edit Multiple Wizard by opening it from the toolbar or **Actions** menu in the following views:

- **Scenarios** > **Intra-Day**
- **Scenarios** > **Agent-Extended**
- **Master Schedule** > **Intra-Day**
- **Master Schedule** > **Agent-Extended**

To use the wizard:

1. In the Intra-Day or Agent-Extended view, use the **Actions** menu to open the wizard by selecting **Edit Multiple**, or click the icon in the toolbar.
2. When the wizard opens, make the appropriate selections and change settings, as necessary, in each of the following screens (as described below):
   - Select date
   - Select activities
   - Select agents
   - Select state types
   - Select states
3. Click **Finish**.

When the view reappears:

- If the Auto-Commit inserted items check box is enabled, and you are editing a schedule scenario, your changes are committed to the scenario.
- If the **Auto-Commit inserted items** check box is not enabled and you are editing a schedule scenario, then your changes appear in the schedule in **Pending** mode. You must commit them or roll them back with the Commit/Rollback Multiple wizard.

Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published. If you are editing the **Master Schedule**, and the **Auto-Commit inserted items** check box is enabled, then the changes are committed to the **Master Schedule** and visible to all users.

Select date

This page in the wizard contains a calendar.

1. Select the date for the schedule items you want to change.
   If you are editing a schedule scenario, you cannot select dates that fall outside of the scenario's date range. The calendar works as described in How to Use the Calendar.
2. Select a **Start Time** and **End Time** and, if applicable, check the **Next Day** check box.
3. Select the **Time Zone**.
   If you select Local or User for time zone, agent states will display in the time zone of the agent's site. Keep this in mind if you are selecting agents from multiple sites.
4. Click **Next**.
   If you want to close the wizard without saving your selection, click Cancel.

Select activities

1. Select any combination of **activities** and **multi-site activities**.
   Expand business units to display their multi-site activities and sites, and expand sites to display their activities. Only objects that were selected at the last time you clicked Get data are available. By default, all are selected.
2. Click **Next** to apply your selections and continue, or click **Cancel** to make no changes and close the wizard.

Select agents

1. Select any combination of **agents**.
2. Select individual agents from multiple teams, or you can select whole teams or the whole site. Only objects that you selected the last time you clicked **Get data** are available.
3. Optionally, select **Insert only if there are no errors** and/or **Show warnings**.
   - If you select the **Insert only if there are no errors** check box and try to save the new items, WFM Web will not insert any of them if the server returns any schedule validation errors.
   - If you select the **Show warnings** check box, WFM Web displays any schedule validation warnings that would be generated if the items were inserted into agents' schedules. If schedule validation errors also occur, WFM Web does not insert any changes into the schedule.
   - If you are editing the **Master Schedule** and have **Approve Changes** security permission, you can select the **Auto-Commit inserted items** check box to have your changes immediately inserted into the **Master Schedule**. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any inserts that you make are pending, and they must be reviewed and approved before they can take effect in the **Master Schedule**.
   - If you are editing a schedule scenario, you have the option to select the **Auto-Commit inserted items** check box. If checked, your changes are committed to the schedule scenario. If not checked, your changes go into a **Pending** state. They can be committed or rolled back by you using the Commit/Rollback Multiple wizard. Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published.
4. Click **Next** to open the next dialog in the wizard, or click **Cancel** if you want to close the wizard without

saving your selection.

Select state types

1. Select the **state type** that you want to edit: **Breaks**, **Meals**, **Exception**, and **Time Off**.
   Only part-day exceptions and time off are displayed. You cannot edit full-day items when using this wizard.
2. Click **Next** (to proceed to the next page).
3. To review or change your entries in other dialog in the wizard, click **Previous**, or click **Cancel** to close the wizard without saving your selection.

Select states

1. Select the agents' states you want to change, and then make changes by clicking the following radio buttons and check boxes:
   - **Move start time**—Enter a new start time and click either the **Forward** or **Backward** radio button.
   - **Set start time**—Enter a new start time and, if applicable, check the **Next Day** checkbox.
   - **Change duration**—Click the check box to enable and enter a new value for the duration.
   - **Move to date**—Click the check box to enable and enter a new value for the date within 6 weeks of the schedule date range. WFM will display an error if you select dates outside of this limit.
2. Click **Finish**.
   After making changes in this screen and clicking Finish, the Review Messages dialog might open to display error or warning messages. To understand when and why it sometimes appears, see Review Messages.

Review Messages

In the Edit Multiple wizard, the **Review Messages** dialog contains any warnings or errors that display if the start and end times entered in the **Select state types** page are not within the shift's time range. Depending on what values you change, you'll see one of two error messages:

- *Error: The start time and end time of the state must be within the agent's day range.*
- *Error: The duration of agent state must be greater than 0.*

If the new values for start and end time or duration for the selected state are not within an acceptable range for the agent's shift, the **Repeat update** button is disabled. If you click **Back**, the changed values appear in red. Only after you've changed the value to within an acceptable range will they appear in black again and no further error messages will display.

The dialog contains the following details:

Team Name	The team to which the agent belongs.
Agent Name	The agent whose schedule item is being changed.
Date	The date that the message was generated.
Messages	The message type (either Warning or Error), numeric code, and the message text.
Action	Click one of two buttons: • **Back**—Enables you to go back and change the values you initially entered (if you receive an error message). • **Repeat update**—Enables you to retry the values you initially entered.
Close	Closes the dialog box and does not retrieve fresh data from the server.
Help	Displays this help topic.

Delete Multiple Wizard

Use the **Delete Multiple** function to remove one or more items from one or more agents' schedules at once. You can use the **Delete Multiple Wizard** (DMW) to delete items from either schedule scenarios or the **Master Schedule**.

To use the **Delete Multiple Wizard**:

1. From the **Agent-Extended**, **Intra-Day**, or **Weekly** view's **Actions** toolbar or **Actions** menu, select **Delete Multiple**.
   If you have unsaved changes, WFM Web prompts you to save them before proceeding.
2. Select activities from the **Delete Multiple Wizard's** screen Select Activities.
3. Select agents from the **Delete Multiple Wizard's** screen Select Agents.

> ## Tip
> Agents without skills are not displayed in the **Select Agents** screen.

4. Select the agents whose schedules you are editing.

> ## Important
> If you are deleting items from the **Master Schedule** and you have the **Approve Changes** security permission, you can select the **Auto-Commit deleted items** check box to have your items immediately deleted from the **Master Schedule**. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any deletions that you make are pending, and they must be reviewed and approved before they can take effect in the **Master Schedule**. If you are deleting items from a schedule scenario, you have the option to select the **Auto-Commit deleted items** check box. If selected, then your deletions are committed to your schedule scenario. If not selected, then your deletions go into a **Pending** state. They can be committed or rolled back by you using the Commit/Rollback Multiple wizard. Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published.

5. Click **Next**.
6. Select the dates from which to delete items in the Select Dates screen, then click **Next**.

> ## Warning
> Any item that overlaps the dates and times selected will be deleted, even if it overlaps by as little as a minute.

7. In the Select State Types view, select one or more states. Then click **Next**.
8. Fill in the Select Breaks, Select Meals, Select Exceptions, Select Time Offs or Select Marked Times screen that appears next. Then click **Finish**.

The view reappears. If **Auto-Commit** was on, your changes are committed to the schedule. If not, the changes are in a **Pending** mode.

DMW: Select Activities

To complete the **Select Activities** screen in the **Delete Multiple Wizard** (DMW):

1. Select any combination of **multi-site activities** and **activities**.

   You can expand business units to display their multi-site activities and sites, and expand sites to display their activities. Only objects that were selected at the last time that you clicked **Get data** are available. By default, all are selected.

2. Click **Next** to apply your selections and continue, or click **Cancel** to make no changes and close the wizard.

DMW: Select Agents

To fill in the **Select Agents** screen in the **Delete Multiple Wizard** (DMW):

1. Select any combination of **agents**.

   You can select individual agents from multiple sites and multiple teams, or you can select whole teams or whole sites. Only agents who are selected on the **Object** pane’s **Agents** tree and who can work on activities that are selected in the first page of this wizard are available for selection.

   The list of available agents is also affected by the filter dialog check box Include agents with matching secondary skills.
2. If you want, select **Delete only if there are no errors** and/or **Show warnings**.
   - If you select the **Delete only if there are no errors** check box, then when you try to save the new items, WFM will not delete any of them if the server returns any schedule validation errors.
   - If you select the **Show warnings** check box, WFM displays any schedule validation warnings that would be generated if you were to delete the items from the agents' schedules.

   > **Important**
   > If schedule validation errors also occur, WFM does not delete any items from the schedule.
3. If you are deleting items from the **Master Schedule** and you have the **Approve Changes** security permission, you can select the **Auto-Commit deleted items** check box to have your deletions immediately made to the **Master Schedule**. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any deletions that you make are **Pending**. They must be reviewed and approved before they can take effect in the **Master Schedule**.

   If you are deleting items from a schedule scenario, you have the option to select the **Auto-Commit deleted items** check box. If you do, then your deletions are committed to your schedule scenario. If not, then your deletions go into a **Pending** state. They can be committed or rolled back by you using the Commit/Rollback Multiple wizard. Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published
4. Click **Next** to open the Select Dates screen.

   Click **Cancel** if you want to close the wizard without saving your selection.

DMW: Select Dates

The **Select Dates** screen in the **Delete Multiple Wizard** (DMW) contains a calendar.

1. Select the date or dates from which you want to delete the schedule items.
   The calendar works as described in How to Use the Calendar.

   ### Tip
   If you are deleting from a schedule scenario, you cannot select dates that fall outside of the scenario's date range.

2. Click **Next**.
   The Select State Type screen appears.

   ### Warning
   Any item that overlaps the dates and times selected will be deleted, even if it overlaps by as little as a minute.

DMW: Select State Types

To fill in the **Select State Types** screen in the **Delete Multiple Wizard** (DMW):

1. Select the **state** or **states** that you want to delete. You can delete breaks, meals, exceptions, time off, or marked time.
2. Click **Next**.

   The screen that appears next depends on your selections on this screen. If you are deleting one state type, the screen for that state appears. Otherwise, the screens appear one after the other in the order Select Breaks, Select Meals, Select Exceptions, Select Time Off, and Select Marked Time.
3. If you want to review or change your entries in the Select Dates screen, click **Previous**.
   Or, if you want to close the wizard without saving your selection, click **Cancel**.

DMW: Select Breaks

To fill in the **Select Breaks** screen in the **Delete Multiple Wizard** (DMW):

1. Select one or more breaks from the **Select Breaks** list. (If more breaks are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)
   - To select individual items, hold down the **Ctrl** key while you select. To de-select, continue holding **Ctrl** and click the item(s) you wish to de-select.
   - For a range of items, select the first item, hold down the **Shift** key, select the last item in the range. To revise the range, continue holding **Shift** and click the last item to be included in the range.

   The list shows all of the breaks that have been configured for the selected site in the WFM Web. The list's columns show each break's full name, short name, how long it lasts, whether or not the break is paid, and the site in which the break's site name is shown. You cannot select or clear the Paid check box here.
2. If you selected to delete meals, exceptions, time off, or marked time, click **Next**.
   Otherwise, click Finish to delete the selected breaks and close the wizard. This returns you to the Agent-Extended, Intra-Day, or Weekly view.
   - If you want to review or change your entries in the Select State Types screen, click **Previous**.
   - Or, if you want to close the wizard without saving your selection, click **Cancel**.

DMW: Select Meals

To fill in the **Select Meals** screen in the **Delete Multiple Wizard** (DMW):

1. Select one or more meals from the **Select Meals** list. (If more meals are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)
    - To select individual items, hold down the **Ctrl** key while you select. To de-select, continue holding **Ctrl** and click the item(s) you wish to de-select.
    - For a range of items, select the first item, hold down the **Shift** key, select the last item in the range. To revise the range, continue holding **Shift** and click the last item to be included in the range.

    The list shows all of the meals that have been configured for the selected site in the WFM Web. The list's columns show each meal's full name, short name, how long it lasts, whether or not the meal is paid, and the site in which the meal's site name is shown. You cannot select or clear the Paid check box here.
2. If you selected to delete exceptions, time off or marked time, click **Next**.
   Otherwise, click Finish to delete the selected meals and close the wizard. This returns you to the Agent-Extended, Intra-Day, or Weekly view.
    - If you want to review or change your entries in a previous screen, click **Previous**.
    - Or, if you want to close the wizard without saving your selection, click **Cancel**.

DMW: Select Exceptions

To fill in the **Select Exceptions** screen in the **Delete Multiple Wizard** (DMW):

1. Select one or more exceptions from the **Select Exceptions** list. (If more exceptions are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)

   - To select individual items, hold down the **Ctrl** key while you select. To de-select, continue holding **Ctrl** and click the item(s) you wish to de-select.
   - For a range of exceptions, select the first exception, hold down the **Shift** key, select the last exception in the range. To revise the range, continue holding **Shift** and click the last exception to be included in the range.

   The list shows all of the exceptions that have been configured for the selected site in the **Policies** module of WFM Web. The list's columns show each exception's full name, its short name, whether it is paid, whether it is convertible to a day off, whether it is a full-day exception, and all sites to which the exception is assigned.

   > **Tip**
   > The check boxes simply indicate the exception's configured properties. You cannot select or clear them here.

- If you selected to delete time off or marked time, click **Next**.
  Otherwise, click **Finish** to delete the selected exceptions and close the wizard. This returns you to the **Agent-Extended**, **Intra-Day**, or **Weekly** view.

   - If you want to review or change your entries in a previous screen, click **Previous**.
   - Or, if you want to close the wizard without saving your selection, click **Cancel**.

DMW: Select Time Offs

To fill in the **Select Time Offs** screen in the **Delete Multiple Wizard** (DMW):

1. Select one or more time-off types from the **Select Time Offs** list. (If more time-off types are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)

- To select individual time-off types, hold down the **Ctrl** key while you select. To de-select, continue holding **Ctrl** and click the item(s) you wish to de-select.
- For a range of time-off types, select the first time-off type, hold down the **Shift** key, select the last time-off type in the range. To revise the range, continue holding **Shift** and click the last time-off type to be included in the range.

  The list shows all of the time-off types that have been configured for the selected site in the **Policies** module of WFM Web. The list's columns show each time-off type's full name, its short name, whether it is paid, whether it counts toward the configured time-off limits, and all sites to which Time Off is assigned.

  > **Tip**
  > The check boxes simply indicate the time-off type's configured properties. You cannot select or clear them here.

- If you selected to delete marked time, click **Next**.
  Otherwise, click **Finish** to delete the selected time-off items, and all other selected items, and close the wizard. This returns you to the **Agent-Extended**, **Intra-Day**, or **Weekly** view.

  - If you want to review or change your entries in a previous screen, click **Previous**.
  - Or, if you want to close the wizard without saving your selection, click **Cancel**.

DMW: Select Marked Times

To fill in the **Select Marked Times** screen in the **Delete Multiple Wizard** (DMW):

1. Select the **marked time items** that you want to delete.
2. Click **Finish** to delete the selected marked time items, and all other selected items, and close the wizard.
   You return to the Agent-Extended, Intra-Day, or Weekly view.
   - To review or change your entries in a previous screen, click **Previous**.
   - To close the wizard without saving your selection, click **Cancel**.

Commit/Rollback Multiple Wizard

Use the **Commit/Rollback Multiple Wizard** (CRW) to commit or roll back all pending schedule changes for selected agents on selected dates. You can use this wizard in **Agent-Extended**, **Intra-Day**, or **Weekly** view for a schedule scenario or the **Master Schedule**.

> **Important**
> You must have the **Approve Changes** security permission enabled to commit pending changes to the **Master Schedule**. If you do not, you can use this wizard only to roll back pending changes. If you are working in a schedule scenario, then you can commit/rollback all pending changes.

Terminology

- **Commit**—*Committing* a pending change makes it part of the **Commit/Rollback Wizard** publically-available scenario or **Master Schedule**. When a schedule scenario is published, only committed changes appear in the **Master Schedule**.
- **Rollback**—*Rolling back* pending changes removes them from possible inclusion in the scenario or **Master Schedule**.
- **Pending**—A schedule change will be put in *Pending* status in three cases:
  1. The user making changes to the **Master Schedule** does not have security permissions to approve changes in the **Schedule** module.
  2. The user who is making changes to the **Master Schedule** does have permission to approve changes, but turns off **Auto-Commit** ().
  3. The user is working with a schedule scenario and turns off the **Auto-Commit** icon.

  In all cases, the user must click **Save** for the changes to be evaluated by the system (and appropriate warnings generated). At that point, the changes go into a **Pending** state if any of the three conditions are met.

  Users can see changes that are **Pending** because they will have an upside-down red triangle (yield icon) in the left-most column of the schedule view. However, if the user does have **Approve Changes** permission and does have the **Auto-Commit** icon enabled, then when the user clicks **Save**, barring any warnings, these changes will become **Committed** to the schedule.

  So, with **Pending** changes, the user may invoke the **Commit/Rollback Wizard** to either commit pending changes for selected agents and dates, or roll those pending changes back, which is basically undoing those pending changes for the selected agents and dates

If you have the **Approve Changes** permission, there are two additional ways to work with pending schedule changes:

- You can approve or reject pending changes to the **Master Schedule** using the Master Schedule Change Approval module. The **Changes Approval** module enables you to view each pending change before deciding whether to approve or reject them. Using the **Commit/Rollback Multiple Wizard**, you commit or roll back all changes for the selected agents and dates without seeing each change.

- You can commit or roll back all items in an agent's schedule day that have pending status directly in the **Master Schedule Intra-Day** or **Master Schedule Agent-Extended** views. To do so, right-click the row showing the agent's schedule and then select **Commit** or **Rollback**. If you are working in a schedule scenario, you can do this regardless of whether or not you have **Approve Changes** permissions.

Using the Commit/Rollback Multiple Wizard

To use the wizard:

1. From the view's **Actions** toolbar or **Actions** menu, select **Commit/Rollback Multiple**.
   If you have unsaved changes, WFM Web prompts you to save them before proceeding. The Commit/Rollback Multiple Wizard's first screen, Select Activities, opens.
2. Select the **activities** whose pending changes you want to commit or roll back.
   The **Commit/Rollback Multiple Wizard's** next screen, Select Agents, opens.
3. Select the agents whose pending changes you want to commit or roll back.
   Note that agents without skills are not displayed in the Select Agents screen.
4. Select whether to commit or roll back pending changes.
5. Click **Next**.
6. In the [[CRBSltDtsSc|Select Dates] screen, select the dates for which to save or delete pending items, and then click **Finish**.
   The view reappears.

CRW: Select Activities

To fill in the **Select Activities** page in the **Commit/Rollback Wizard** (CRW):

1. Select any combination of **activities**.
   You can select individual activities from multiple sites and multi-site activities from business units. Only activities that belong to the business unit and sites that are selected on the Object pane's Activities tree are available for selection here.
2. Click **Next** to open the Select Agents page.
   Click Cancel if you want to close the wizard without saving or deleting pending changes.

CRW: Select Agents

To fill in the **Select Agents** page in the **Commit/Rollback Wizard** (CRW):

1. Select any combination of **agents**.
   You can select individual agents from multiple sites and multiple teams, or you can select whole teams or whole sites. Only agents who are selected on the Object pane's Agents tree, and who can work on activities that are selected in the first page of this wizard, are available for selection.
2. Select **Commit** or **Rollback**.
   If you do not have the Approve Changes security permission, the Commit check box is cleared and disabled. In that case, you can only roll back pending changes.
3. Click **Next** to open the Select Dates page.
   Click Cancel if you want to close the wizard without saving or deleting pending changes.

CRW: Select Dates

The **Select Dates** page in the **Commit/Rollback Wizard** (CRW) contains a calendar.

1. Select the **date** or **dates** for which you want to commit or rollback all schedule items.
   The calendar works as described in How to Use the Calendar.

   > **Tip**
   > If you are working with a schedule scenario, be sure to select dates that fall within the scenario's date range.

2. Click **Finish**.
   This returns you to the **Agent-Extended**, **Intra-Day**, or **Weekly** view. If you committed items, these now appear in the schedule.

- If you want to review or change your entries on the Select Agents page, click **Previous**.
- Or, if you want to close the wizard without saving your selection, click **Cancel**.

Modify Individual Agents' Schedules

You can insert and edit schedule items for a particular agent using:

- **Master Schedule** Agent Extended or Intra-Day view
- **Scenario** Agent Extended or Intra-Day view

For example, you might want to reassign an agent from an overstaffed activity to an understaffed activity; or you might want to swap paid hours for a day off, due to a change in overall interaction volume.

You can insert and edit schedule items using shortcut menus. Once items are inserted, you can graphically move or resize certain items using your mouse.

Using Shortcut Menus

To display a shortcut menu:

- Right-click an agent's grid row at the timestep where you want to insert or edit a schedule item. (To zoom in on a particular timestep, clear the **Full-Day** view check box and/or resize the columns.)

To close a shortcut menu without selecting any of its commands:

- Press **Esc**.

Inserting Full-Day Schedule Items

Right-click an agent timestep that contains schedule items to bring up a shortcut menu. The menu items available for selection depend on the full-day items that already exist (or do not exist) in the agent's schedule day. The table below discusses all menu items.

Insert Day Off	Assigns the agent a day off, which appears as a light-green bar.
Insert Full-Day Time Off	Displays a window where you can select a full-day time-off type. Once inserted, the time off appears as a dark-green bar (you can change the color with the Colors Tool).
Insert Full-Day Exception	Displays a window where you can select a full-day exception type. Once inserted, the exception appears as a red bar.

Insert Shift	Displays a window where you can select a shift type and start/end times. Once inserted, the shift appears as a dark-blue bar with thick black borders (you can change the color with the Colors Tool).
Insert Marked Time	Displays the **Insert Marked Time** dialog box.
Undo Changes	Restores this agent's schedule to the state in which it was last saved.
Insert Multiple	Enables you to insert schedule items for multiple agents or teams.
Copy Schedule	This menu item appears in **Agent-Extended** view. You can select a single agent schedule day, and use this option to select the **Start** and **End dates** to which you want to copy the selected schedule day.

Modifying Full-Day Exceptions, Days Off, and Full-Day Time Off

Once a full-day exception, day off, or a full-day time off is inserted, you cannot delete or move or resize its bar in the grid. However, you can replace it by inserting a different full-day item.

When you right-click an inserted full-day exception, day off, or full-day time off, the existing item (**Exception**, **Day Off**, or **Full-Day Time Off**) does not appear on the full-day shortcut menu, but the **Edit Exception** or Edit Full-Day Time Off options appear for Exception or Time Off in the pop-up menu. You can move or resize the Full-Day **Exception** or **Full-Day Time Off** if they were created with start/end time settings. See also Edit Exception Dialog Box and Inserting and Editing Shift Items.

Modifying Shifts

After a shift is inserted, you cannot delete its bar in the grid; but you can replace the bar by inserting a different full-day item. When you right-click an inserted shift, you see the shift items shortcut menu.

To change the shift's start and/or end times, do one of the following:

- Use the shortcut menu's Edit command.
- Move or Resize the shift bar visually while holding down the **Ctrl** key.

Tip

If you change the shift start time or shift end time for an agent who belongs to a shared transport group, you will see a warning message when you save the change.

Inserting and Editing Shift Items

Once an agent's schedule contains a shift (represented by a blue bar with thick black borders), you can insert and edit schedule items within that shift, or you can edit the shift itself.

- Right-click the shift to display a shortcut menu with the options listed below.
- When you move your mouse pointer over an option that ends with an arrow (**>**), a submenu displays further options.

Insert >	From the submenu, select Break, Meal, [part-day] Exception, [part-day] Time Off, Activity Set, Work Set, Marked Time, or Exception with payback.... Use the resulting dialog box or wizard to insert schedule items.
Edit >	From the submenu, select the activity set, shift, or other schedule item that you want to edit. Use the resulting Edit dialog box to adjust the item's start and/or end times.
Set Activities For >	From the submenu, select **Work**, **Work Set**, or **Activity Set**. Use the resulting Set Activities dialog box to define the agent's work activities. **Activity Sets** appear in the grid as yellow bars.
Delete >	From the submenu, select the activity set or other schedule item that you want to delete from the schedule. Important Select carefully, because there is no confirmation prompt before the item is deleted. If a shift has only one activity set, you cannot delete that activity set, so the **Delete** command does not appear when you right-click it.
Replace	When you right-click directly on an item (a meal, a break, a part-day or a full-day exception, a part-day or a full-day time off, or marked time) in an agent's schedule, the Replace command becomes visible and enabled in the drop-down menu. Use this command to replace the selected "old" item with another "new" item of the same type. Selecting **Replace > item...** from the menu activates the **Replace Multiple Wizard**. This wizard displays a series of selection screens (for example, **Select Activities** and **Select Agents**) that mimic similar screens in the Insert Multiple Wizard. Make your selection(s) on each of these screens and click **Next**. The final selection screen displays items of the same type as the item you are replacing. Select an item and click **Finish**. WFM replaces the "old" item with the "new" item, for all selected agents who have the same "old" item in their schedule on that day.

Commit	When you are working in the **Master Schedule**, if the agent's schedule day has pending items, and you have the **Approve Changes** security permission enabled, you can select **Commit** to have all that day's pending changes included in the schedule. If you are working in a schedule scenario and the agent's schedule day has pending items, you can select **Commit** to have all that day's pending changes included in the schedule.
Rollback	If the agent's day has pending schedule items, you can select **Rollback** to remove all pending changes for the agent for that day.
Undo Changes	Restores this agent's schedule to the state in which it was last saved.
Insert Multiple	Enables you to insert schedule items for multiple agents or teams.
Schedule History	Use to compare the current master schedule with its previous state, and optionally restore the master schedule to that same previous state (rollback).

Tip

A warning message appears if your insertions or edits violate time constraints for the shift or for any shift item, including the timing and distribution of meals, breaks, and exceptions.

Moving and Resizing Shift Items

Once an agent's schedule contains a shift, you can use your mouse to move (drag and drop) or resize some of the shift's schedule items (activity sets, breaks, meals, and part-day exceptions) or the shift itself.

Moving an item changes both its start and end times, but maintains its duration. Resizing an item changes its start or end time, which changes its duration.

Important

A **Warning** message is displayed if your changes would create overlapping schedule items, or if they would violate time constraints for the shift or any shift item. Some examples of time constraints are:

1. WFM Web never moves meals or part-day exceptions along with shifts; some meals or

part-day exceptions—depending on their configuration—cannot occur outside shift hours.

2. WFM Web never moves activity sets or work sets with 1-minute granularity, but treats these shift items as 15-minute granularity items and, if the 15-minute granularity constraint is violated, the following **Warning** message is displayed: *Constraint violation: Activity set times must match the start/end or 15-minute time steps.*

Moving a Shift Item

Tip

To move the shift itself, hold down the **Ctrl** key throughout the first two steps.

1. Click in the middle of the schedule item and hold down the mouse button.
   The mouse pointer changes to a four-pointed arrow.
2. Drag the item to the right or left.
3. Release the mouse button (and any keys) when the item has the start and end times that you want.
   A warning message informs you of any constraint violations.

Resizing a Shift Item

Tip

To resize the shift itself, hold down the **Ctrl** key throughout the first two steps.

1. Click near a schedule item's start or end point and hold down the mouse button.
   The mouse pointer changes to a two-pointed arrow. (If you see a four-pointed arrow, or if the point does not change at all, release the mouse button, and then click at the very edge of the item's colored bar.)
2. Drag the bar's start or end point to the right or left.
3. Release the mouse button when the item has the start or end time that you want.
   A warning message informs you of any constraint violations.

Committing or Rolling Back Pending Changes

To include all pending changes that are in an agent's schedule for the selected day, or to remove them all:

1. Right-click the agent's schedule row in the **Intra-Day** view.
2. Select **Commit** or **Rollback** from the shortcut menu.

Tip

If do not have the **Approve Changes** security permission enabled, you cannot select **Commit**.

Insert Shift Wizard

Use the **Insert Shift Wizard** to insert a shift into an agent's schedule:

1. In the Intra-Day or Agent-Extended grid, right-click an agent's row.
2. Click any timestep for any agent who does not have a scheduled shift.
3. From the shortcut menu that appears, select **Insert Shift**.
   The first of the **Insert Shift Wizard's** two screens, **Select Shift** opens.
4. In the **Select Shift** list, click a shift row to select it.
   The list shows the name and hours of each shift that was configured in the WFM Web. If necessary, a vertical scroll bar appears to the right.
5. Adjust the shift's **Start time** and **End time**, as necessary.
   - Select **Next Day** if the **End time** is on the day after the **Start time**. Your settings must match the shift type's configured time constraints.
   - Select **Automatically Insert Meals and Breaks** to have meals and breaks automatically inserted along with the shift and optimized, based on schedule coverage, according to the constraints configured for this **Shift** in Web. If this option is unchecked, then the **Shift** will be inserted with no meals and breaks, and those can be inserted manually.
   - Select the check box **Show activities matching secondary skills** to specify that activities which match the secondary skill of this agent.
6. Click **Next**.
7. On the **Select Activity Set** screen, you can select:
   - one or more work activities
   - an activity set
   - one or more activities associated with an activity set.
8. If you are inserting a shift for an agent that can work on multiple activities, you can select multiple activities.

   > **Important**
   >
   > The shift hours that you selected on the previous screen must be consistent with the activity set's configured time constraints. (Click **Back** if you need to change the shift's start or end times.)

9. Click **Finish** to insert the selected work activities or activity sets and close the wizard.

   > **Important**
   >
   > No warnings are displayed if the shift contains incorrectly configured shift items that cannot be inserted.

The view reappears. The new shift appears as a dark-blue bar (you can change the color with the Colors Tool).

Insert Break Dialog

Use the **Insert Break** dialog box to insert a break into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors Tool).
   Click at or near the timestep where you want the break to begin.
2. From the shortcut menu that appears, select **Insert > Break**.
   The **Insert Break** dialog box opens. It shows the breaks that are associated with the selected shift.

   Click **Show all** if you prefer to display all of the breaks that are configured for your site.
3. In the **Choose Item to Insert** list, click a break row to select it.
   The list's first two columns show each break's full and short name.

   The **Hours** column shows the break's configured duration in hours and minutes.

   A check mark in the **Paid** column indicates that the break time is paid. (You cannot select or clear check boxes to change this attribute here.)
4. Adjust the **Start time** and **End time**, as necessary.
   You can select **Next Day** for **End time** only or both **Start** and **End time** if either of them is on the next day. (You cannot select **Next Day** for **Start time** only.)
5. Click **OK** to insert the selected break and close the dialog box.
   The view reappears. The new break appears as a light-gray bar.

Insert Meal Dialog

Use the Insert Meal dialog box to insert a meal into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors Tool).
2. Click at or near the timestep where you want the meal to begin.
3. From the shortcut menu that appears, select **Insert > Meal**.
   The Insert Meal dialog box opens. It shows meals that are associated with the selected shift.
   Click Show all if you prefer to display all of the meals that are configured for your site.
4. In the **Choose Item to Insert** list, click a meal row to select it.
   The list's first two columns show each meal's full and short name.
   The Hours column shows the meal's configured duration in hours and minutes.
   A check mark in the Paid column indicates that the meal time is paid. (You cannot select or clear check boxes to change this attribute here.)
5. Adjust the **Start time** and **End time**, as necessary.
   You can select Next Day for End time only or both Start and End time if either of them is on the next day. (You cannot select Next Day for Start time only.)
6. Click **OK** to insert the selected meal and close the dialog box.
   The view reappears. The new meal appears as a light-blue bar.

> ## Important
> When you insert a meal using this dialog box, the schedule does not take into account the agent’s qualification for the meal.

Insert Activity Set Dialog

Use the **Insert Activity Set** dialog box to insert an activity set into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors Tool).
2. Click at or near the timestep where you want the activity set to begin.
   From shortcut menu that appears, select **Insert > Activity Set**.

   The **Insert Activity Set** dialog box opens.
3. Select an activity set, or one or more of its associated activities.
   In the **Choose Item to Insert** tree, you can expand activity sets to display their activities. You can select a whole activity set, or one or more activities within any one activity set.
4. Adjust the **Activity Set** or selected activity **Start time** and **End times**, as necessary.
   You can select **Next Day** for **Start time** or **End time** if either of them is on the next day.

   > **Important**
   > Your settings must match the activity set's configured time constraints.

5. Click **OK** to insert the selected activity set and close the dialog box.
   The view reappears.

   Activity Sets appear as yellow bars (you can change the color with the Colors Tool).

Inserting Exceptions

WFM uses different dialog boxes and menu items for part-day and full-day exceptions:

- Use the **Insert Exception** dialog to insert a part-day exception into an agent's schedule.
- Use the **Insert Full-Day Exception** dialog to insert a full-day exception into an agent's schedule.

For example, you might need to schedule a full-day meeting or a one-hour appointment after the schedule was created.

Inserting Part-Day Exceptions

To insert a part-day exception:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors Tool).
2. Click at or near the where you want the exception to begin.
3. From the shortcut menu that appears, select **Insert > Exception**.
   The Insert Exception dialog box opens. The agent's name appears in the title bar.
   You can add memos to Exceptions that then appear in some Schedule views and reports. For details see Exception Memos in the *Workforce Management Administrator's Guide*.
4. In the grid, click an exception row.
   The grid shows the part-day exception types that are configured in the Policies module of WFM Web for Supervisors.
   If necessary, a vertical scroll bar appears to the right. The first two columns show each exception's full and short name.
   Check marks in the remaining columns indicate whether the exception is paid, whether it is convertible to a day off, and whether it counts as time off. You cannot select or clear check boxes to change these attributes here.
   The column Site lists all sites to which the exception is assigned.
5. Adjust the **Start time** and **End time** for this exception.
   - Select **Next Day** next to the **Start Time** and **End Time** text boxes if the exception starts on the day after the agent's shifts begin.
   - Or select **Next Day** next to the **End Time** text box if the exception begins on the same day as the agent's shifts begin, but ends on the day after.
6. Click **OK** to insert the selected exception and close the dialog box.
   The view reappears. The new exception appears as a red bar (you can change the color with the Colors Tool).

> **Important**
> If the Start and End times would place the exception outside the agent's shift hours, a warning message appears. If an agent's activities are all scheduled in activity sets, and you assign a long exception, the exception may be the only schedule state group available during the agent's paid hours.

Inserting Full-Day Exceptions

To insert a full-day exception:

1. In the **Intra-Day** or **Agent-Extended** grid, right-click an agent's row.
2. From the shortcut menu that appears, select **Insert > Full-Day Exception**.
   The **Insert Full-Day Exception** dialog box opens. The agent's name appears in the title bar.
3. Click an exception row.
   The list shows the full-day exception types that were configured in the **Policies** module of WFM Web for Supervisors. If necessary, a vertical scroll bar appears to the right. The first two columns show each exception's full and short name.

Check marks in the remaining columns indicate whether the exception is paid, whether it is convertible to a day off, and whether it counts as time off. You cannot select or clear check boxes to change these attributes here.
The column **Site** lists all sites to which the exception is assigned.

4. In the **Specify Start/End** section, you can optionally adjust the exception's **Start time** and **End time** as necessary.
    - If the exception begins on the same day as the agent's shift begins, but ends on the day after, select **Next Day** next to the **End Time** text box.
    - If you selected a paid exception, you can select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a work day.
    - If you select the **Specify Paid Hours** check box, the **Paid Hours** check box becomes enabled.

    ## Important

    If you enter a start/end time but do not enter a value for **Paid Hours**, then **Paid Hours** will equal **End Time** minus **Start Time** (a value known as **Total Hours or Duration**).

5. Click **OK** to insert the selected exception and close the dialog box.
    The view reappears. The new exception shows as a red bar.

Insert Time Off Dialogs

WFM uses different dialog boxes and menu items for part-day and full-day time-off schedule items:

- Use the **Insert Time Off** dialog to insert part-day time off into an agent's schedule.
- Use the **Insert Full-Day Time Off** dialog to insert full-day time off into an agent's schedule.

For example, an agent might be called to jury duty or need to be out sick after the schedule is created.

Inserting Part-Day Time Off

To insert a part-day time-off item into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors Tool).
2. Click at or near the timestep where you want the time off to begin.
3. From the shortcut menu that appears, select **Insert > Time Off**.
   The **Insert Time Off** dialog box opens and the agent's name appears in the title bar.
4. In the list of time-off types, click the row for the time-off type that you want to insert.

- Select the **Show all** check box to display all time-off types. Clear the check box to display only the time-off types that are applicable to the selected agent. See the "Time-Off Primer" appendix in the *Workforce Management Administrator's Guide*.

> **Important**
>
> The list shows time-off types that were configured in the **Policies** module of WFM Web for Supervisors. If necessary, a vertical scroll bar appears to the right.
>
> If you select a time-off type that is not associated with a selected agent, WFM assigns the time-off item but does not enforce the time-off balance rules. However, if the time-off type counts toward time-off limits, WFM takes this time-off item into account when calculating limits.
>
> The first two columns show each time-off type's full and short name.
>
> Check marks in the remaining columns indicate whether the time-off item is paid and whether it counts toward time-off limits. You cannot select or clear check boxes to change these attributes here.
>
> The **Site** column lists all sites to which the time-off type is assigned.

- Optional: Adjust the **Start Time** and **End Time** for this time off, if the default values are not correct.

a. Click inside the **Start Time** and **End Time** fields, to modify the default values for hours, minutes, and AM/PM.

b. Select **Next Day** to the right of the **Start Time** text box if the time-off period starts on the day after the agent's shifts begin.

c. Select **Next Day** to the right of the **End Time** text box if the time-off period ends on the day after it begins.

- Click **OK** to insert the selected time-off item and close the dialog box.
The view reappears and the new time-off item appears as a dark-green bar (you can change the color with the Colors Tool).

> **Important**
> If the **Start** and **End time** would place the time off outside the agent's shift hours, a warning message appears. If an agent's activities are all scheduled in activity sets, and you assign a long time off, the time off may be the only schedule state group available during the agent's paid hours.

Inserting a Full-Day Time Off

To insert a full-day time-off item into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** grid, right-click an agent's row.
2. From the shortcut menu that appears, select **Insert > Full-Day Time Off**.
The **Insert Full-Day Time Off** dialog box opens. The agent's name appears in the title bar.
3. In the list of time-off types, click the row for the time-off type that you want to insert.

> **Important**
> The list shows the time-off types that were configured in the Policies module of WFM Web. If necessary, a vertical scroll bar appears to the right.
>
> If you select a time-off type that is not associated with a selected agent, WFM assigns the time off but does not enforce the time-off balance rules. However, if the time-off type counts toward time-off limits, WFM takes this time-off item into account when calculating limits.
>
> The first two columns show each time-off type's full and short name.
>
> Check marks in the remaining columns indicate whether the time-off item is paid and whether it counts toward time-off limits. You cannot select or clear check boxes to change these attributes here.
>
> The **Site** column lists all sites to which the time-off type is assigned.

4. Optional: Adjust the **Start time** and **End time** for this time-off item, if the default values are not correct.
   a. Select the check box **Specify Start/End** to enable the **Start Time** and **End Time** fields, then click inside each field to modify the default values for hours, minutes, and AM/PM.
   b. Select **Next Day** to the right of the **End Time** text box if the time-off period ends on the day after it begins.

3. Optional: Specify a nonstandard length for your full-day time-off item.

   - Select the **Specify Paid Hours** check box to enable the **Paid Hours** field, then click inside and enter or select a value to specify the exact number of hours in a full day for this particular time-off item.

   > **Important**
   >
   > The **Specify Paid Hours** check box is enabled only if you selected a paid time-off type in the **Choose Time Off** list.

- Click **OK** to insert the selected time-off item and close the dialog box.
  The view reappears. The new full-day time-off item appears as a dark-green bar (you can change the color with the Colors Tool).

Insert Work Set Wizard

Use the **Insert Work Set Wizard** to insert a work set into an agent's schedule.

1. In the Intra-Day or Agent-Extended grid, right-click an agent's row.
2. From the shortcut menu that appears, select **Insert Work Set**.
3. In the **Insert Work Set Wizard's Specify Work Set Parameters** screen:
    1. Adjust the **Start time** and **End time**, as necessary.
       Select Next Day (next to the Start Time text box and next to the End Time text box) if the work set starts and ends on the day after the agent's shifts begin.
       — OR —
       Select Next Day (next to the End Time text box only) if the work set begins on the same day as the agent's shifts begin, but ends on the day after.
    2. Select one of the following two radio buttons:
        - **Select new activities for work set** (default) enables the wizard to display the **Select activities for work set** screen.
        - **Use existing shift activities** disables that screen.
    3. Select the check box **Mark as overtime with marked time** (default) to enable the wizard to display the **Select Marked Time for Overtime** screen. Clear this check box to disable that screen.
    4. Click **Next**
       The Select activities for work set screen opens, if you enabled it previously.
4. Select from the list of activities (ones that the agent could work, based on his/her primary and secondary skills):
    - One or more work activities
    - An activity set
    - One or more activities that are associated with an activity set; If you are inserting a work set for an agent who can work on multiple activities, you can select multiple activities.
      The work set hours that you selected on the previous screen must be consistent with the activity set's configured time constraints. (Click Back if you need to change the work set's start or end time.)
5. Click **Next** (or **Finish**, if this is the final screen).
   The Select marked time for overtime screen opens, if you enabled it previously.
6. Select an item from this list.
   The list displays only items that have Used To Mark Overtime enabled and thus may be empty.
7. Click **Finish** to insert the selected work sets and close the wizard.

How WFM Processes Overtime Work Sets

The process described here applies only to work sets that are inserted as overtime (as Marked Time). For work sets that are not inserted as Marked Time, WFM simply replaces the shift activities with new activities, as specified in the work set. WFM does no additional checks or rescheduling.

WFM's automated overtime insertion process:

1. Finds the appropriate shift definition for the extended shift.
2. Schedules break/meals on the inserted overtime part of the shift.
3. Designates the overtime by specifying a Marked Time.

WFM checks all of the shifts that agent can potentially work in the following order:

1. The currently scheduled shift
2. Primary shifts, other than the currently scheduled shift
3. Secondary shifts

If WFM does not find an acceptable shift, it keeps the current shift, which might now be invalid (if paid time is too long, start or end time is out of bounds, etc.).

WFM also checks the following shift parameters:

- Are the shift start time, end time, and paid time correct?—If any one of these parameters are unacceptable, WFM does not use the shift (for example, if shift starts at 9:00 am and the inserted work set is from 8:00 am to 9:00 am).
- Are the shift's breaks and meals compatible with the currently scheduled breaks and meals?—WFM check the order, duration, paid/unpaid status, and start/end time of meals. Meaning that if one shift has a 10-minute paid break, then it is considered equivalent to a 10-minute paid break in another shift.

When matching shift items sequences, WFM checks:

- From the left to right if the work set is inserted at the end of the shift.
- From right to left if the work set is inserted at the beginning of the shift.

Use Case: Applying Secondary Shifts to Overtime Work Sets

This use case describes how WFM processes overtime work sets when added at the beginning of the shift and when added at the end of the shift:

Shift 05—Original shift:

- Shift starts at 8:00 am ends at 4:30 pm:
- The paid duration is 8 hours (valid duration 8:00-9:45), and unpaid break = 30 minutes.
- Scheduled breaks are: 15-minutes paid, 30-minutes unpaid, 15-minutes paid.

Adding Work Sets to End of Shifts

When a work set is added to the end of **Shift 05** we have the following configuration:

- Shift starts at 8:00 am ends at 7:00 pm
- The paid duration is 10 hours and 30 minutes.
- WFM considers this shift invalid.

Shift 96—No match for **Shift 05**

- Start, end and paid time are OK but breaks do not match as this shift has one unpaid 60 minute break.

Shift 95—Match for **Shift 05**

- Start, end and paid time are OK
- Breaks for this shift duration are 15 minutes paid (match), 30 minutes unpaid (match), 15 minutes paid (match) and 10 minutes paid (no match but this new break can be scheduled in added workset).

Adding Work Sets to Beginning of Shifts

When a work set is added to the beginning of **Shift 05** we have the following configuration:

- Shift starts at 5:30 am and ends at 4:30 am.
- The paid duration is 10 hours and 30 minutes.

Shift 96—No match for **Shift 05**

- Start, end and paid time are OK but breaks do not match as this shift has one unpaid 60 minute break.

Shift 95—No match for **Shift 05**

- Start, end, and paid time are OK
- Paid breaks are also mandatory so the new shift MUST have all breaks of the original **Shift 05**.
- As work set is added in the beginning WFM looks at breaks from the right (or the end of the sequence).
- Break comparison fails at the last 10-minute paid break. It is present in **Shift 95** but it does not exist in **Shift 05**. If paid breaks were not mandatory, then **Shift 95** might be used.

Since none of the shifts match WFM keeps the original **Shift 05**, as is.

Insert Marked Time Dialog

Marked Time allows you to mark part or all of an agent's shift to track how that time is being spent by the agent. For example, you may want to mark extra time that an agent is working at the end of the day. You can see this marked time on the schedule, and you can run several reports to track how different types of marked time are used within the schedules.

Use the **Insert Marked Time** dialog box to insert marked time into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors Tool).
   Click near the timestep where you want the marked time to begin. You can also click a timestep outside of the shift. If you click a timestep before the shift's current start time, you will be able to both extend the shift start time and insert the marked time between the new earlier start time, and the current start time, in one step. If you click a timestep after the shift's current end time, you will be able to both extend the shift end time and insert the marked time between the current end time and the new later end time, in one step.
2. From the shortcut menu that appears, select **Insert > Marked Time**.
   The Insert Marked Time dialog box opens. It shows the marked-time types that are configured for the selected site. For each marked-time instance, the display shows its long name, short name, and whether it is designated for overtime.
3. In the list of marked-time types, click the row for the type that you want to insert.
   The list shows each marked-time type's full and short name.
4. Adjust the **Start time** and **End time**, as necessary.
   Select Next Day next to the Start Time and End Time text boxes if the marked time starts on the day after the agent's shifts begin. Or select Next Day next to the End Time text box if the marked time begins on the same day as the agent's shifts begin, but ends on the day after.
5. Click **OK** to insert the marked time and close the dialog box.
   The view reappears. The new marked time appears in orange (you can change the color with the Colors Tool).

> ### Important
> If the marked-time period that you selected overlaps any time off, WFM Web generates an error message, and the marked time is not inserted.

For an explanation of how to display marked time, see Master Schedule Intra-Day View or Schedule Scenario Intra-Day View.

Insert Exception with Payback

Use the **Insert Payback Exception Wizard** in the **Schedule** > **Intra-Day** view to add unpaid, part-day exceptions to agents' schedules to make up for or pay back time lost due to lateness or a personal appointment.

To enter an exception with payback:

1. In the Intra-Day grid, right-click a shift in an agent's row.
2. From the shortcut menu that opens, select **Insert** > **Exception with payback...**.
   The Insert Payback Exception Wizard opens.
3. **Select Exception**:
   a. Select and exception in the list.
   b. Set a new **Start time** and **End time** to cover the time missed, checking **Next Day**, if applicable.
      The **Enter payback** check box is checked by default.
   c. In the **Memo** field, add comments or additional information about this exception.
   d. Click **Next**.
4. **Select Marked Time**:
   a. Select a Marked Time of type Payback from the list.
   b. Click the **Calendar** to select the date for this payback.
   c. Click **Next**.
5. **Select Payback Parameters**:
   a. Add work to the shift or meal, by changing one or more of the following parameters. If you change more than one, the total time must equal the payback period for this exception:
      - The **New start** time for the shift
      - The **New end** time for the shift
      - The **New start** time for the meal
      - The **New end** time for the meal
6. Click **Finish**.

What You Should Know About Payback Exceptions

Keep these things in mind when inserting payback exceptions:

- You can insert payback intervals into schedules for:
  - For the current date, to the end of a shift and/or over meals by decreasing meal duration.
  - For future dates, to the beginning of a shift, end of a shift, and/or over meals by decreasing meal

duration.
To decrease the meal duration, edit start/end time by setting start time later and/or the end time earlier.

- You can specify multiple intervals of payback for a single day, but all intervals must be within the same shift. If the payback starts before the shift start time, you must specify a new start time for the shift. The payback interval is the time between the new and previous shift start time.
- If you add an exception over unpaid time, you must estimate the amount of time for payback, because it might not be the entire duration of the exception.
- When reviewing schedule validation warnings related to payback exceptions, you can save or cancel the changes.

After Inserting Exceptions with Payback

WFM reschedules shift items as follows:

- WFM leaves unpaid shift items as they are (same duration, same place in the schedule).
- If a shift change occurs and additional shift items are required, WFM schedules them. For example, if the shift duration increases, then additional breaks could be added to the schedule.

If an existing shift does not have a shift item sequence that matches the modified schedule, WFM selects other shifts with shift item sequences that "fit better". If WFM cannot find a shift item sequence that "fits", it leaves the existing or current schedule as is.

Schedule History

Use this window to compare the current schedule with its previous state, and optionally to restore the schedule to that same previous state (rollback).

> **Tip**
>
> The rollback function—and all **Schedule History** functionality—applies only to the **Master Schedule**.

1. In the Intra-Day grid, right-click an agent's row.
2. From the shortcut menu that appears, select **Schedule History...**.
   The Schedule History window opens.
   The top half of the window displays a grid listing all changes made to the schedule, with each change on a single line. The columns for each line are
   - **Date of Change**
   - **User** (who made the change)
   - **Action** (type of change performed)
   - **Historical Schedule** (a horizontal bar graphic that represents the hours of the shift containing those changes).

   The bottom half displays the agent's current (post-change) schedule on the left and the agent's historical (pre-change) on the right. As you use the cursor to select each listed change in the top half of the window, WFM highlights the elements that changed on both sides of the bottom half. Thus, you can compare each change with the original state and decide if you want to restore the schedule to its original state before that particular change.
3. When you have selected the change you wish to restore, click **Restore** at the bottom of the window.

Edit Item Dialog

Use the **Edit Item** dialog box to edit the start time, and the end time or duration, of an agent's schedule item.

1. In the Intra-Day or Agent-Extended grid, right-click an agent's shift or shift item.
   To edit the shift itself, right-click anywhere in the shift. To edit a shift item (activity set, time off, marked time, break, or meal), right-click that item. See Edit Exception Dialog Box if you are editing an exception.
2. From the shortcut menu that appears, click or hover over **Edit** to display the **Edit** submenu.
3. From the submenu, select the item that you want to edit.
   The submenu always includes the **Shift** option. If it omits the shift item that you intended to edit, press **Esc** to close the shortcut menu, and then right-click again directly inside that shift item.
4. Adjust the **Start time** and **End time**, if you want to.
   Select **Next Day** next to the **Start Time** and **End Time** text boxes if the shift item starts on the day after the agent's shifts begin. Or select **Next Day** next to the **End Time** text box if the shift item begins on the same day as the agent's shifts begin, but ends on the day after.
5. If you are editing a shift, you can select **Move Schedule Items With Shift**.
   - If you select this check box, you cannot directly edit the shift's end time. WFM Web calculates the end time based on the start time that you enter. It moves the whole shift and all shift items, except for meals and exceptions.
   - If you leave this check box cleared, you can specify the shift's start and end time.
   - The **Move Schedule Items With Shift** option appears only when you edit a shift.
6. Click **OK** to save your changes.

The dialog box closes if the edit is successful. The grid reflects your edits to this schedule item, and adjacent activity sets may automatically expand or contract to maintain a continuous schedule.

A **Warning** message appears if the edit violates time constraints for the shift or any shift item. For example, WFM Web attempts to maintain the distribution of breaks and activity sets within shifts, and it never moves meals or exceptions along with shifts. Also, meals cannot occur outside shift hours.

Edit Exception Dialog

Use the **Edit Exception** dialog box to edit exceptions on the **Schedule Intra-day** or **Agent-Extended** view.

1. In the Intra-day or Agent-Extended grid, right-click the exception that you want to change.
2. From the shortcut menu that appears, click or hover over **Edit** to display the **Edit** submenu.
   See Editing Part-Day Exceptions and Editing Full-Day Exceptions.
3. From the submenu, select **Exception**.
   You can either edit the parameters of the current exception or replace it with a new one from the exception list in the Edit Exception dialog box.

Editing Part-Day Exceptions

To edit part-day exceptions:

1. If you are replacing the current exception with another one, select it from the list (only valid part-day and full-day exceptions are listed).
   - If it is a part-day exception, set **Start** and **End times**.
   - If it is full-day exception, use the next algorithm **To edit full-day exceptions**.
   - If the exception starts on the day after the agent's shifts begins, select **Next Day** beside the **Start time** and **End time** text boxes.
   - If the exception begins on the same day as the agent's shifts begins, but ends on the day after, select **Next Day** beside the **End time** text box.
2. Click **OK** to save your changes or **Cancel** to discard them.

Editing Full-Day Exceptions

To edit full-day exceptions:

1. If you are replacing the current exception with another one, select it from the list (only valid full-day exceptions are listed).
2. Optional: To set start and end times for full-day exceptions, select the **Specify Start/End** check box and enter the value.
   If the exception ends on the day after its beginning, select **Next Day** next to the **End Time** text box.
3. Optional: If full-day exception is paid, select the **Specify Paid Hours** check box and enter a duration other than the default number of hours in a work day.

> **Tip**
>
> If you select the **Specify Paid Hours** check box, the **Paid Hours** text box becomes editable. If you enter a start/end time but do *not* enter a value for **Paid Hours**, then **Paid Hours** equals **End time** minus **Start time** (a value known as *Total Hours* or *Duration*).

4. Click **OK** to save your changes or **Cancel** to discard them.
   The edited exception is displayed.

Edit Full-Day Time Off Dialog

Use the **Edit Full-Day Time Off** dialog to edit full-day time-off items on the **Schedule Intra-Day** or **Agent-Extended** view. Use the **Edit Item** dialog for a part-day time off.

Editing Full-Day Time Off

To edit Full-Day Time Off:

1. In the Intra-day or Agent-Extended grid, right-click the full-day time off that you want to change.
2. From the shortcut menu that appears, select **Edit Full-Day Time Off**.
3. Edit the parameters of the current time off or replace it with a new one from the time off list in the **Edit Full-Day Time Off** dialog box.
   Only valid time-off items that are assigned to agent are shown in the list.
4. Check **Show All** to show all of the time-off items assigned to the site.
5. If you are replacing the current time off with another one, select it from the list.
6. Optional: Select the **Specify Start/End** check box and enter or select the correct times in the **Start time** and **End time** text boxes.

   ### Tip
   If the time off ends on the day after its beginning, select **Next Day** next to the **End Time** text box.

7. Optional: If the **Full-Day Time Off** is paid, select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a work day.

   ### Tip
   If you select the **Specify Paid Hours** check box, the **Paid Hours** text box becomes editable. If you enter a start/end time but do *not* enter a value for **Paid Hours**, then **Paid Hours** equals **End time** minus **Start time** (a value known as *Total Hours* or *Duration*).

8. Click **OK** to save your changes or **Cancel** to discard them.
   The view displays, showing the edited time off.

Set Activities Dialog

1. In the Intra-Day or Agent-Extended view, right-click an agent's **shift** or **activity set**. (The agent's schedule must already contain a shift with or without an activity set.)
2. From the shortcut menu that appears, select **Set Activities** For.
3. From the submenu, select the activity set that you want to modify.
   - If right-clicking on dark blue activity work inside a shift, the submenu allows you to select **Work** (you can change the color with the Colors Tool).
   - If right-clicking on a yellow activity set, the submenu also allows you to select **Activity Set** (you can change the color with the Colors Tool).
   - If a work set exists, the submenu also allows you to select **Work Set**, which starts the Insert Work Set Wizard.

   Depending on your selection from this submenu, you will either edit the work activities or the activities inside the Activity Set.
   The Set Activities dialog box opens. Its grid shows all activities that belong to the selected work or activity set. (If necessary, a vertical scroll bar appears to the right.)
   In the first column, a check mark indicates activities that have already been assigned.
4. Add or remove activities.
   - Select a check box to add an activity.
   - Clear a check box to remove an activity.
   - You can add multiple activities within any one activity set.
5. Click **OK** to save your changes.
   If your changes violate no constraints, the dialog box closes and the view reappears.
   If your changes would delete an activity set's last remaining activity, an error message appears. Use the Delete command to delete the activity set itself.
   If your changes violate any constraints (for example, keeping too few activities to fill the activity set's hours of operation), a warning message informs you of the problem.

Copy Schedule Dialog

The **Copy Schedule** dialog box appears when you right-click an agent schedule and select Copy Schedule from the shortcut menu in:

- Scenario Agent Extended view
- Master Schedule Agent-Extended view

Text at the top of this dialog box contains the date to be copied:
Copying schedule of *agent_name* from date to:

To specify the copy-to date range:

1. Click the date selector for **Start date** and enter or select the start date for the copy-to range.
2. Click the date selector for **End date** and enter or select the end date for the copy-to range.
3. Click **OK**.
   If the copy operation does not violate the agent's schedule constraints (maximum selection of six weeks, and the Start and End dates must fall within the target schedule's date range for the Master Schedule or schedule scenario), WFM copies the selected schedule day from the Start date to the End date. If the operation does violate schedule constraints, the Review Messages dialog box opens.
4. Under **Action**, keep **Save** or click the down arrow and select **Do Not Save** from the drop-down menu.
5. When finished in this dialog box, click **OK**.

Meeting Scheduler

Use the **Meeting Scheduler Wizard** to schedule a meeting:

1. In the **Schedule** module, select one of these views: **Master Schedule Weekly**, **<*schedule*> Weekly**, **Master Schedule Intra-day**, **<*schedule*> Intra-day**.
2. At the top right of the **Work** pane, select the week that you want to schedule the meeting.
3. Click **Meeting Scheduler** .
4. At the Please select a meeting from the list page, choose an existing meeting (or decide to create a new one) and enable or disable auto-commit.
   If you chose to use an existing meeting, you will see all **Meeting Scheduler** pages except Meeting Parameters. Otherwise, you will see only the Participants and Meeting Parameters pages.
5. At the Participants page, choose the agents who should attend (if you are creating a new meeting). if you use an existing meeting, the list of participants is read-only.
6. At the Dates Range page, choose the range of dates that are acceptable for the meeting.
7. At the Meeting Parameters page, select the meeting type, possible dates, possible times, duration, and minimum percentage of required attendees.
8. A message box appears, listing how many agents were scheduled for the meeting. Click **OK**.
9. If some agents were not scheduled, a message box may appear listing them. Click **OK**.
   The meeting is scheduled, and exceptions, representing meeting, are inserted into the schedule.

Meeting Scheduler vs. Meeting Planner

The Meeting Scheduler is best suited for scheduling ad hoc meetings and other meetings that you did not know about when you built the original schedule.

The **Meeting Planner** (available through the **Policies** module) is useful for scheduling pre-planned meetings especially ones that recur, such as weekly team meetings or bi-weekly one-on-one coaching sessions. If you want to edit, copy, or delete meetings, use the Meeting Planner.

MSW: Select Meeting

To fill in the **Please Select A Meeting From The List** screen in the **Meeting Scheduler Wizard** (MSW):

1. Choose one of the following two radio buttons:
   - **Create new meeting**—You will configure the meeting by making choices on this screen and two others: participants and parameters.
   - **Use existing meeting**—You will configure the meeting by making choices on this screen and two others: participants and date range.
2. Select or clear the **Auto-commit Changes** check box , to control the auto-commit feature.
   When enabled, the auto-commit feature applies the meeting that you are scheduling to the Master Schedule, immediately after you click Finish. When auto-commit is disabled, your meeting will have the status Pending after you click Finish, and must be committed /approved before it is incorporated into the Master Schedule.
   If you do not have the Approve Changes security permission for the Master Schedule, the Auto-commit Changes check box is disabled.
3. Click **Next** to proceed to the next screen in the wizard.

MSW: Select Participants

To fill in the **Participants** screen in the **Meeting Scheduler Wizard** (MSW):

1. Select any combination of **agents**.

   If you are creating a new meeting, you can select individual agents from multiple sites or teams, or you can select entire sites or teams. However, you can select only within the business unit for which you displayed the **Intra-Day** or **Weekly view**.

   > **Tip**
   > If you use an existing meeting, the list of participants is read-only.

2. Click **Next** to proceed to the next screen in the wizard.

MSW: Select Dates

To fill in the **Dates Range** screen in the **Meeting Scheduler Wizard** (MSW):

1. Enter or select a date in each of the two date selectors.
   - Start Date
   - End Date
2. Click **Next** to proceed to the next screen in the wizard or **Finish**, whichever is enabled.

Date Selection and Schedules

- The **End Date** must be later than the start date.
- The **End Date** date selector is enabled only if the **Recurrence Rule** for this meeting is **Weekly** or **Monthly**.
- WFM will insert into the schedule a single instance of the specified meeting for each agent.
- Default values and validation rules shall depend on the meeting's recurrence rule (if one exists):
  - **Daily**—The default start date is the same as the first date of the current view. The default end date is disabled and always equal to the start date. If you are scheduling in a scenario, the dates must be inside the scenario date range.
  - **X-weekly**—The default start date is the same as the first day of the week that is selected in the current view. The end date is the last day of the X-week period from the start date. If you are scheduling in a scenario, the dates will be trimmed to stay inside the scenario date range.
  - **Monthly**—The default start date is the first day of month that is selected in the current view. The end date is the last day of the same month as the start date. If you are scheduling in a scenario, the dates will be trimmed to stay inside the scenario date range.

MSW: Meeting Parameters

To fill in the **Meeting Parameters** screen in the **Meeting Scheduler Wizard** (MSW) complete the following areas of the screen:

Properties

1. Enter the meeting name into the **Meeting Name** field.
2. Select an exception type from the **Exception type** drop-down menu.

   The list of exception types is populated by exceptions from all sites that were selected on the Participants screen, and were assigned the status **Exception Can Be Used in Meeting Planner/ Scheduler** in the **Policies** > Exceptions Types view.

Dates and Recurrance Rules

1. Enter or select a date in the **Start Date** box.
2. Enter or select a date in the **End Date** box.
3. Optional: Clear the check box to its right to disable the **End Date**.
4. Select the check boxes that correspond to all days of the week that are acceptable for the meeting.

Time and Duration

1. Enter or select a time in the dialog box **Earliest Start**.
2. Enter or select a time in the dialog box **Latest End**.
3. Enter or select the number of hours and minutes that the meeting will last in the dialog box **Meeting Duration**.
4. Select a time zone from the **Time Zone** drop-down list.

> **Important**
> Only configured time zones appear in this list; each item includes the time zone's relationship to GMT. For example, Pacific Standard Time, which is 8 hours later than Greenwich Mean Time is presented as PST (GMT-8.0).

Meeting Type

1. Select one of the following three radio buttons, which enable the properties that are associated with them.
   - **Single Group**—The default meeting type. Represents a single meeting for all agents who are specified on the Participants tab.

     Enter or select the meeting's minimum number of attendees requirement in the **Minimum % of required attendees** box. Set this value to **1%** to indicate no minimum requirement for the number of attendees—for example, to schedule a meeting for as many attendees as possible.

     > **Important**
     > The value `0` (zero) is interpreted as 100% to accommodate data that was migrated from WFM 6.5, because that version did not include the variable **Minimum Percentage of Selected Attendees** in its database.

   - **Single Agent**—A common activity, such as a webinar, that can occur at the most convenient time for each agent.
   - **Multiple Groups**—A common time but for multiple groups. Enter or select a number in each of the four fields below, to specify the group sizes.

• **Min(imum) Number of Groups** • **Max(imum) Number of Groups**	• **Min(imum) Group Size** • **Max(imum) Group Size**

2. Click **Finish**.
   A progress message shows that the meeting being scheduled.

   If the meeting cannot be scheduled for all selected agents, a message box lists how many agents are scheduled, and a second message box lists the agents who could not be scheduled. Click **OK** to acknowledge each message.

> **Tip**
> Meeting scheduler will always use calculated staffing when scheduling the meeting for the Master Schedule. However, for the Schedule Scenario, it will use the staffing type (calculated or required) that was used when building the scenario. As always, existing agent schedules are taken into account and the staffing is adjusted accordingly for both Master and Scenario schedules.

Master Schedule

Use the **Master Schedule** views to display and modify **Master Schedule** data.

If your access rights include access to the **Master Schedule**, the **Master Schedule** menu displays the following **Master Schedule** views:

Master Schedule Coverage	Compares staffing coverage to forecasted (calculated and required) staffing data, and highlights overstaffed or understaffed timesteps.
Master Schedule Weekly	Displays a weekly summary table of total paid hours, working start/end times, or shift names for a site's agents.
Master Schedule Intra-Day	Displays **Master Schedule** details for a 24- or 36-hour period, enabling you to modify schedules for individual or multiple agents. Unless you have the **Approve Changes** security permission, your changes are entered in pending mode. An approver with the **Approve Changes** security permissions must then accept or reject the changes. You can view your pending changes in the **Weekly**, **Agent-Extended**, and **Intra-Day** views.
Master Schedule Agent-Extended	Displays and allows editing of a single agent's schedule for one week or the schedule planning period.
Master Schedule Summary	Displays service-level and related statistics for the **Master Schedule**.
Master Schedule State Group Totals	Displays coverage statistics for every timestep in a selected day.
Master Schedule Overtime Requirement	Use to enter and edit overtime requirements.
Master Schedule Changes Approval	Enables users with the appropriate security permissions to review pending schedule changes, and approve or reject them.

Master Schedule Coverage View

Use the **Master Schedule Coverage** view to compare the **Master Schedule's** staffing coverage with the forecasted (calculated and required) staffing data. See the toolbar image and the button descriptions below.

Graphs and tables show you coverage for each weekday in the selected week, along with totals for the whole week. Overstaffed and understaffed timesteps appear in a distinctive color.

Displaying the Coverage View

To display the **Master Schedule Coverage** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu, select **Master Schedule**.
3. From the **Master Schedule** menu, select **Coverage**.
4. In the Objects pane, select a single business unit, a single site within a business unit, a multi-site activity, and activity group, or a single activity within a site.

Using the Daily Graphs and Tables

The **Coverage** view displays the following information for days of the week:

Graphs	Display coverage information for each day, with a data point for each timestep. Click the Chart Type down arrow to select calculated staffing, required staffing, or both. A blank graph indicates a closed site (or no scheduled activity) for the day.
Tables	Display overstaffing and understaffing totals for each day, with respect to calculated and/or required staffing. Contractual constraints and other configured parameters can reduce a schedule's optimization.
Legend	Explains the significance of each color that is used in the graphs.

Reading the Totals Table

The **Totals** table (at the lower right) displays overstaffing and understaffing totals for the selected week, with respect to calculated and/or required staffing.

Customizing the Coverage View

To customize the schedule coverage data that is presented, use these controls at the top of the working pane:

Chart Type

Click the Chart Type down arrow to choose the type of graphs that you want to be displayed:

Advanced	Graphs present both calculated and required information. Calculated information appears as an area graph with overstaffing/understaffing data, and required staffing appears as a linear graph.
Calculated	Graphs present calculated information with overstaffing/understaffing data.
Required	Graphs present required information with overstaffing/understaffing data.

Cleanup

Opens the Cleanup Master Schedule window, where you can delete **Master Schedule** information for selected dates and agents.

Date

Use the standard date-selection controls to move to other weeks.

Calculating Understaffing and Overstaffing

Any timestep can be subject to either understaffing or overstaffing. WFM calculates these conditions by evaluating Coverage against Forecast. The result is displayed in Time format (`hh:mm`).

Understaffing = The **Forecast** is greater than the **Coverage**. There are too few agents on duty.

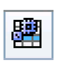
Overstaffing = The **Forecast** is less than the **Coverage**. There are too many agents on duty.

Coverage is measured by evaluating the agents' contributions against the presented activities. These contributions are based on the agents' scheduled activities for each time interval, and on any schedule items that affect these scheduled activities for an interval (such as a break that occurs during only part of an interval).

Totals are calculated by summing **Understaffing/Overstaffing** for all activities for a given time range (because each single **Understaffing/Overstaffing** value is for one timestep).

Toolbar Buttons

You can use the following buttons on the Actions toolbar (or commands in the **Actions** menu) to further customize the chart:

Icon	Name	Description
	**Cleanup**	Opens the Cleanup Master Schedule window. Enables you to delete **Master Schedule** information for selected dates and agents.
	**Use Multi-Site Activities**	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a multi-site activity, business unit, or enterprise in the **Objects** tree. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Master Schedule Weekly View

Use the **Master Schedule Weekly** view to display a summary table of total paid hours, working start/end times, or shift names, for all selected agents (who can be under multiple sites but must all be under the same business unit). See the toolbar image here and the button descriptions below.

> **Important**
> You can also see a summary table of total paid hours, working start/end times, or shift names for your schedule planning period. See Mode for details.

When displaying the **Master Schedule Weekly** view, you can use the Intra-Day Schedule Rebuild Wizard.

Displaying the Master Schedule Weekly View

To display the **Master Schedule Weekly** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu on the toolbar, select **Weekly**.
4. On the Objects pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.

   You can expand business units to display their sites, and you can expand sites to display their teams and agents. You can select multiple sites, teams, and agents, but only one business unit.
5. Click **Get data** to populate the Weekly view table for the selected agents.

You can search the table for particular agents using the **Find Agent** dialog box. To open it, select **Find** from the **Edit** menu or press **Ctrl + F**.

Using the Table

The **Weekly** view table contains rows for each agent that you selected in the **Objects** tree. (If a scroll bar is displayed to the right, you can use it to reveal more agents.) This table includes the following columns:

[Expand/Collapse]	If in Planning Period mode, the first column provides expand/collapse controls that you use to display or hide agent details.
Team	This column lists each agent's team.
Agent	Two columns show an icon representing each agent's contract and the agent's name.
[Week Start Dates]	If you display agent details and you are in Planning Period mode, the rows below each agent's name indicate the start date for each week in the schedule.
[Weekdays]	These cells show agent schedule information for each weekday, for each week in the schedule. The cells' contents correspond to your selection from the Show Data for drop-down list. If an agent is not scheduled for a shift on this day, the cell will contain: **Day Off**, **<name of the full-day time-off type>**, **Working Hours** (for scheduled working hours without a shift), or an exception name (for scheduled full-day exceptions). An icon in the cell for a weekday indicates whether the schedule has been changed for that agent. • If the agent's schedule for that day was assigned during scheduling or rescheduling, no icon appears. • If the agent's day was edited after scheduling or rescheduling, a light-gray pencil icon appears. • If the agent's day was assigned by trading or swapping, the swap icon appears. • A yield icon (upside down red triangle) appears if there are pending changes. Pending changes must be committed by a user with **Approve Changes** security permission. • An icon and red check box appears for every schedule day that contains a granted calendar item (if the option **Show agents with granted and scheduled rotating pattern or any other calendar preference** is selected in the Options dialog box). Tip If there have been multiple changes, the icon represents the most recent status.
Weekly Totals	Shows an agent's total working hours for the displayed week.
Planning Period Totals	Shows an agent's total paid hours for the schedule planning period.

	Important To set this period's duration and start date, see the **Configuration** > **Polices** > **Contracts** > Site Settings tab.

The **Weekly Totals** and **Period Totals** boxes below the table show a grand total of all weekly or planning period total paid hours (respectively) for all selected agents.

Customizing the Master Schedule Weekly View

To customize the displayed table, use these controls at the top of the working pane:

Show Data for

From this drop-down list, select what you want to display inside each day's table cell:

Total Paid Hours	Total working time for the day.
Start/End Times	Start and end times of agents' work.
Shift or **Schedule State Names**	Names of agents' assigned shifts and other full-day states.

Mode

Select one **Week** or **Planning Period** from the **Mode** drop-down list. The table displays data for the selected period. If no schedule planning period is configured, or if more than one site is selected on the **Objects** pane, then the **Planning Period** option is disabled.

Planning Period Mode

Planning Period mode displays schedules for the entire planning period. White and dark gray indicate the type of date range that you are viewing.

Planning Period Color Legend

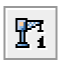
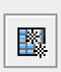
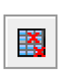
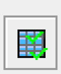
- **White**—Indicates dates that fall within the planning period.
- **Dark Gray**—Indicates dates that are outside the planning period.

Date

Use the standard date-selection controls to move to other weeks.

Toolbar Buttons

You can use the following buttons on the Actions toolbar (or commands in the **Actions** menu) to further customize the displayed table:

Icon	Name	Description
	**Cleanup**	Opens the Cleanup Master Schedule window. Enables you to delete Master Schedule information for selected dates and agents.
	**Rebuild Intra-day Schedule**	Opens the Intra-day Schedule Rebuild Wizard to rebuild an Intra-Day schedule for a specific day or time period for a site, team, or agent.
	**Options**	Opens the Options dialog box. Enables you to select/de-select the Agent Rank and Site Name columns.
	**Filter**	Opens the Filter dialog box] Enables you to filter the displayed information according to activities and contract types. (If you set a new filter, this immediately refreshes the view.)
	**Sort**	Opens the Sorting dialog box, which allows sorting by Team Name, Contract, Agent Name (first or last), Agent Rank or Site Name. You can sort in ascending or descending order. Note that Agent Rank sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank.
	**Swap**	Enables you to swap two agents' schedules with the Swap Agent Schedule Wizard.
	**Insert Multiple**	Opens the Insert Multiple Wizard, which enables you to add multiple items to the Master Schedule at one time.
	**Delete Multiple**	Opens the Delete Multiple Wizard, which enables you to remove multiple items from the Master Schedule at one time.
	**Commit/Rollback Multiple**	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes into the Master Schedule or to remove them and return the

Icon	Name	Description
		Master Schedule to its former settings.
	**Meeting Scheduler**	Opens the Meeting Scheduler Wizard.

Important

You can save changes from within the **Master Schedule Weekly** view only if you have appropriate access rights.

Weekly View Options Dialog Box

Use the **Options** dialog box to display/hide the **Agent Rank** column in the **Schedule Scenario** and **Master Schedule Weekly** views. To open this dialog box:

- Click the **Options** button on the toolbar or select **Options** from the **Actions** menu.

The dialog box that opens for **Weekly** view has two tabs, **Options** and **Columns**.

On the **Options** tab:

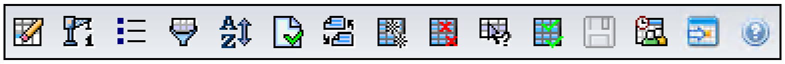
1. Select **Show agents with granted and scheduled rotating pattern or any other calendar preference** to display an icon and red check box near the agents name for every schedule day that contains a granted calendar item.
2. Click **Apply** to save.

On the **Columns** tab:

1. Select **Agent Rank** or **Site Name** to display the corresponding column; de-select to hide the column.
2. Click **Apply** to save.

Master Schedule Intra-Day View

Use the **Master Schedule Intra-Day** view to manage schedule details for agents, for a specific day in the **Master Schedule**. See the toolbar image here the button descriptions below.



If you selected the **Show Performance Information** check box on the **Performance** tab of the Options dialog box, this window also shows performance data in a graph. If you have cleared the **Full-Day View** check box, data is also shown in a table.

You can modify schedule items for individual agents here, and you can insert schedule items for multiple agents.

See also: Modifying individual agents' schedules and Using the Intra-Day Schedule Rebuild Wizard.

Displaying the Intra-Day View

To display the Intra-Day view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu, select **Intra-Day**.
4. On the Objects pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below). WFM then selects matching item(s) from the other tree.

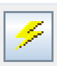
   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select multiple sites, teams, and agents, but only one business unit.
5. Click **Get data** to display the **Intra-Day** view for the selected agents.

Managing the Grid

The **Master Schedule Intra-Day** view includes a grid with one row per agent and the following fields and controls. You can sort by site, team, contract, agent, shared transport, overtime, paid hours, total hours and start time, by clicking on the header for that column.

Double-click cells containing these items, to edit them: **Shift**, **Activity Set**, **Time Off**, **Meal**, **Break**, **Exception**, **Marked Time**.

Grid Controls

Time Zone	From this drop-down menu, select the **Time Zone** that WFM should use to display the data in graphs and tables.
Scheduled agents	Shows the number of agents displayed (based on your selection in the **Objects** tree).
Edited schedules	This indicator shows the number of agents whose schedules you have edited in this view, but not yet saved.
Full-Day View	Select the **Full-Day View** check box to display the current schedule's full day (compressed to fit on screen, without scrolling). Clear the **Full-Day View** check box to display every timestep in the entire day on the **Intra-Day** grid (scrolling required) and above the grid, display a summary of corresponding statistics: **Coverage Scheduled**, **Staffing Calculated**, **Staffing Required**, **Difference Calculated**, **Difference Required**, **Service Level Scheduled**, **ASA Scheduled**, **Deferred Service Level Scheduled**, **Overtime Scheduled**, and **Overtime Required**.
Date selector	Standard date selectors.
Target	Displays the Select Target dialog box, where an object tree lets you choose a **Performance Data Target** that can be: a business unit, a multi-site activity, a site, an activity, or an activity group. See Performance Data Display for details.
Chart Type	Controls what statistics appear in the graph. See Performance Data Display for details.
Granularity	Specifies the granularity, in minutes, of the timesteps in the grid by selecting a number—**15** (default), **30**, or **60**—from the drop-down menu.
 **Refresh Performance Data**	Refreshes the grid. See Performance Data Display for details.

Grid Columns

! (*Save Messages/Warnings*)	This column contains icons that provide information about the agents' schedules. • A yellow pencil icon indicates an item that generated a warning and you selected the Fix Later option. • A green pencil icon indicates schedule items that you have changed but not yet saved. • A red pencil icon indicates an item that generated an error. (Error conditions are more serious than warning conditions.)

	• A light-gray pencil icon appears if the agent's day was edited after scheduling or rescheduling. • A **Swap** icon appears if the agent's day was assigned by trading or swapping. • A Yield icon (upside down red triangle) appears if there are pending changes. Pending changes must be committed by a user with **Approve Changes** security permission. • An agent icon and red check box appear for every schedule day that contains a granted calendar item (if the option **Show agents with granted and scheduled rotating pattern or any other calendar preference** is selected in the Options dialog box). Double-click a yellow or red icon to review message details and resolve the unsaved items.
Site	This column shows the site of each agent.
Team	This column shows each agent's assigned team.
	This column shows each agent's contract. The color-coded symbol appears in each row, and the column heading is blank.
Agent	This column shows each agent's name.
Shared Transport	If displayed (using the Options dialog box), this column shows the shared transport group participation for each agent on the selected day. **Shared Transport** is known by many different names worldwide—bus, carpool, ride share, lift share, and para transit, for example. See Wikipedia for details.
Overtime	If displayed (using the Options dialog box), this column shows the duration of overtime for each agent on the selected day.
Paid Hours	If displayed (using the Options dialog box), this column shows each agent's paid hours for the selected day.
Total Hours	If displayed (using the Options dialog box), this column shows each agent's total hours for the selected day.
Shift Start Time	If displayed (using the Options dialog box), this column shows each agent's }shift or full day start time for the selected day's work.
Shift End Time	If displayed (using the Options dialog box), this column shows each agent's shift or full day end time for the selected day's work. If there is a full day item without an end time, the value in this column is empty. This column is

	sortable.
Shift	If displayed (using the Options dialog box), this column shows the shift name.
* (*Comment*)	If this column is displayed (using the Options dialog box), an asterisk (*) indicates that a comment was saved for the indicated agent and schedule day. Double-click a column cell to view or edit comments.
Accessible Schedule Details	If displayed (using the Options dialog box), you can click this icon to display the Accessible Schedule Details dialog box, which simplifies and organizes commands for vision-impaired users and the screen readers that they use.
[Timesteps]	These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the **Full Day View** check box and/or resize the columns. To make changes to one agent's schedule at a time, right-click the timestep that you want to modify and then select the command from the shortcut menu. See Modify Individual Agent's Schedules for instructions and explanations.
[Horizontal scroll bar]	This scrollbar appears below the grid when clearing the **Full Day View** check box causes some timesteps to be hidden offscreen. Scroll it to the right to display later timesteps.
Legend	Identifies the particular type of schedule item that each bar color in the grid indicates.
Details	When you click an agent's row, this field lists the agent's scheduled activities on the selected day.

Customizing the Grid

You can display more timesteps by resizing some columns to the left of the grid. For details, see Getting Started.

Searching for an Agent

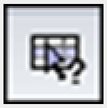
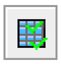
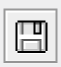
To find a specific agent in the **Master Schedule Intra-day** view:

1. Search the table for particular agents, by using the **Find Agent** dialog box. To open it, select **Find** from the **Edit** menu or press **Ctrl + F**.
   The **Find Agent** dialog box opens. You can search by first or last name.
2. Enter part or all of the agent's name and then click **OK**.
   The **Master Schedule Intra-Day** view display shifts to display information for the selected agent.

Toolbar: Modifying Multiple Agents' Schedules

Use the following buttons on the toolbar (or commands in the **Actions** menu) to modify multiple agents' schedules at once, or to further customize/cleanup the displayed grid:

Icon	Name	Description
	Cleanup	Opens the Cleanup Master Schedule window, which enables you to delete **Master Schedule** information for selected dates and agents.
	Rebuild intra-day schedule	Opens the Intra-Day Schedule Rebuild Wizard. Use this wizard to rebuild an **Intra-Day** schedule for a specific day or time period within a day for a selected site, team, or agent.
	Options	Opens the Options dialog box. Enables you to customize the view, including whether to show agent availability, use a 24-hour or 36-hour display, display marked time on top, display performance data, and display or hide the **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Accessibility**, and **Comment** columns.
	Filter	Opens the Filter dialog box. Enables you to filter the displayed **Master Schedule** information. (If you set a new filter, this immediately invokes **Get data**.)
	Sort	Opens the Sorting dialog box.
	Swap	Opens the Swap Agent Schedule Wizard, which enables you to swap two agents' schedules.
	Insert Multiple	Opens the Insert Multiple Wizard, which enables you to insert breaks, meals, and exceptions, days off, time off, shifts, marked time, or work sets for multiple agents or teams.
	Delete Multiple	Opens the Delete Multiple Wizard, which enables you to

Icon	Name	Description
		remove multiple items in the **Master Schedule** at one time.
	**Edit Multiple**	Opens the Edit Multiple Wizard, which enables you to edit multiple items in the **Master Schedule** at one time.
	**Commit/Rollback Multiple**	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes (changes entered when auto-commit was off or disabled) into the **Master Schedule** or to remove them and return the **Master Schedule** to its former settings.
	**Save**	If you have the appropriate access rights, clicking this button saves any **Master Schedule** changes that you have made in this view. If the server cannot save all changes, red or yellow icons in the grid's first column indicate those agents for whom you must correct errors or acknowledge warnings.
	**Auto-Commit**	Toggles the auto-commit feature on and off (or you can select **Auto-Commit** from the **Actions** menu). If on, changes are immediately applied to the **Master Schedule**. If off, changes have **Pending** status and can be committed/approved before they are incorporated in the official version of the **Master Schedule**. If you do not have the security permission **Approve Changes** for the **Master Schedule**, auto-commit is disabled.
	**Meeting Scheduler**	Opens the Meeting Scheduler, which enables you to schedule meetings to already build scenario for selected agents.
	**Move to Current Day**	Also known as the *Today* button. Click this button to display data for today.

To make detailed schedule changes for one agent at a time (such as inserting, editing, or deleting the agent's schedule items), see Modifying Individual Agents' Schedules.

If you make schedule changes in the **Intra-Day** view and do not click **Save**, you are prompted to save your changes when you select a different module or view, or when you launch certain wizards or child windows.

Performance Data Display

Selecting the **Show Performance Data** check box on the **Performance** tab of the **Options** dialog box adds a graph and a table to the **Master Schedule Intra-day** display.

> **Tip**
> The table appears only if you clear the **Full Day View** check box.

To configure the performance data views:

1. Select a target for the performance data by clicking the button next to the **Target:** label.

   The list that appears can contain the activities and activity groups that are associated with the site selected on the **Objects** pane, and the multi-site activities that are associated with the current schedule. If no site is selected, the list contains only multi-site activities.

2. Select the granularity in which performance data should be presented: **15**, **30**, or **60** minutes.

3. Select the type of data to be displayed in the graph and table.

   - Schedule coverage appears as a red line on the graph. To configure the graph, select a value from the **Chart Type** drop-down list:
     - **Calculated** (**Calculated Staffing**)—Appears on the graph in blue.
     - **Required** (**Required Staffing**)—Appears on the graph in yellow.
     - **Advanced** (both **Calculated** and **Required Staffing**)—Appears on the graph as a blue area for the calculated staffing and as a yellow line showing the required staffing.
     - **Overtime** (calculated as **Calculated Staffing–Overtime Requirement**)—Appears on the graph as a light blue area.
     - **Overtime Advanced** (calculated as **Scheduled Coverage–Overtime Scheduled**)—Appears on the graph as a line in magenta. By default, the graph shows **Calculated Staffing**.
   - The table always displays values for **Schedule Coverage** and **Calculated Staffing**. It might show additional figures, depending on your selections on the **Performance** tab of the Options dialog box.

If you are not using automatic updates, click **Refresh Performance Data**  to update the performance data view. You can select **Update Automatically** on the **Performance** tab of the Options dialog box.

The **Multi-Skill Enabled** label appears on the right end of the **Performance Data Display** if you enabled the `SplitMS` option in Genesys Administrator. For more information, see the "Enabling Multi-Skill Support" section in the *Workforce Management Administrator's Guide*.

Tip

WFM presents Performance data in the **Master Schedule > Intra-Day** view in the same format as the data in the **Performance > Intra-Day** view; specifically, empty data is no longer shown as `0`.

Master Schedule Intra-Day Accessible Schedule Details

To reach this view, you clicked **Accessible Schedule Details** in a specific agent's row, for a specific date, in any of the four views listed above.

This view is designed specifically for screen-reader software, and for ease of selecting commands. It includes:

- Read-only information about the selected agent's team, time, and other statuses.
- A table that lists in each row: one item in the schedule and multiple buttons to modify it.
- A field for comments by users.
- Buttons for inserting items into the selected day on the selected agent's schedule—also for deleting items, and for performing other functions.

Click a button to display the dialog box or the wizard which corresponds to that action.

If you select any action or command in error, click **Cancel** on the unwanted dialog box, to return to the **Accessible Schedule Details** view.

Master Schedule Intra-Day: Performance Data Target

To view performance data in the **Master Schedule Intra-Day** view or the **Schedule Scenario Intra-Day** view, you must choose a target. The target is the source of the performance data. You can select the Enterprise, a business unit, a site, an activity group, or an activity (either multi-site or single-site).

To change the **Select Target** window:

- Click the **Target:** button on the **Schedule Intra-Day** view 

.

> **Important**
> This option is available only if you have chosen to view performance data by selecting the **Show Performance Information** check box on the **Performance** tab of the View Options dialog box.

Selecting the Appropriate Time Zone

When you select a site on the **Object** pane (for example, San Francisco), you are also specifying that site's time zone, which may differ from the data source's time zone. You can change the time zone manually by selecting the appropriate zone from the **Time Zone** drop-down list near the upper right of the **Intra-Day** view. The selected time zone is applied to the grid and graphs that you view when you request performance data. Schedules and whatever you select to view would be displayed in the selected time zone, regardless of the data source's local hours (WFM makes the appropriate time conversion).

Viewing Multi-Site Activity Data

Select the **Use Multi-site Activities** check box to display forecast data that is taken from multi-site activities (MSAs), and schedule data that is the sum/average of **Activities** under your selected target (MSA, business unit, or site). All data is transposed to the time zone of the site that you selected on the **Object** pane.

Clear the **Use Multi-site Activities** check box to display all MSA data as a sum/average. All data is transposed to the selected site's time zone.

If you set the **Use Multi-site Activities** button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Master Schedule Intra-Day: Options Dialog

Use the **Options** dialog box to configure the data that is shown on the:

- Intra-Day view or Agent Extended view for the current scenario.
- Master Schedule Intra-Day or Master Schedule Agent-Extended view.

To open the **Options** dialog box:

1. Click **Options**  on the **Actions** toolbar, or select **Options...** from the **Actions** menu.
   The **Option**s dialog box opens.
   - When called from an **Intra-Day** view, it has three tabs: **Options**, **Performance**, and **Columns**.
   - When called from an **Agent-Extended** view, it has two tabs: **Options** and **Columns**.

   Each tab is described below.
2. After you are done configuring the **Options** dialog box, click **OK** to save your changes, or **Cancel** to restore the original selections.

The **Options** dialog box closes and the view refreshes. The settings that you configure for a scenario or the **Master Schedule** appear whenever you return to the view for that scenario or for the **Master Schedule**, until you log off.

To configure options in this dialog box:

1. If you do not need the **Legend** to appear, you can clear the **Show Schedule Legend** check box to provide more space for the grid.
2. If you want to see agent availability on the grid, select the **Show Agent Availability** check box. Hours when an agent is unavailable are then shown in light gray on the grid.
3. Select the check box **Show agents with granted and scheduled rotating pattern** or any other calendar preference to see which schedule days contain such an item. The result: a red check box and **Agent** icon appears in the left-most column (labeled "!") for every **Agent** who meets these conditions.

   > **Tip**
   >
   > You can use this tool to learn whether an agent was given a schedule based on a schedule preference, which might influence your decision to modify this agent's schedule. This icon is displayed only if the agent was given a rotating pattern or preference (such as for time off) as a result of building a schedule. If an agent's schedule is manually edited to give him or her a preference, or a schedule from a rotating pattern, then the icon will not be displayed.

4. Select the radio button for the hours you want to show, **24** to show 24 hours or **36** to show 36 hours.
5. Select the **Presentation** type: **Schedule only**, **Schedule on top**, or **Marked time on top**.
   Your selection affects the colored bars in the schedule. If **Schedule only** is selected, you cannot see **Marked time**.

To configure the **Performance** tab (not available in **Agent-Extended** view):

1. If you select the Show Performance Information check box, you can further customize exactly what performance information WFM Web shows on the **Intra-Day Schedule** view.
   If you clear this check box, the rest of the options on this tab are disabled.
2. If you prefer not to see the legend that explains the colors used to distinguish performance data, clear the **Show Performance Legend** check box.
3. The **Update Automatically** check box determines whether schedule changes are shown when they happen.
   Clear this only if you have network bandwidth issues that make automatic updates a problem.
4. If you selected to view performance data, you can select the check boxes to show additional information in the performance table.

   > **Tip**
   > You see the table *only* if the **Full-Day View** check box is not selected.

   In addition to scheduled coverage and calculated staffing, which always appear, you can select any or all of these ***Show additional data*** options to appear in the table:

   - Required Staffing
   - Difference between Coverage and Calculated Staffing
   - Difference between Coverage and Required Staffing
   - Scheduled Service Level Percentage
   - Scheduled Deferred Service Level Percentage
   - Scheduled ASA **(Average Speed of Answer)**
   - Overtime Schedule (default: cleared)
   - Overtime Requirement (default: cleared)

> **Important**
> If any of the cells in the **Difference in Calculated Staffing** or **Difference in Required Staffing** columns show as understaffed, WFM alerts the user by changing the color of the cell to red. Although red is the default color, you can change it, by using the settings in **About > Settings** (in the upper-right corner of the GUI).

To configure the **Columns** tab:

- Select the check boxes for the optional columns that you want to display. Clear the check boxes for any columns that you want to hide. For **Intra-Day** and **Agent-Extended** views, you can add the following columns: **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Accessibility**, and **Comments**. In **Intra-Day** view, all columns are sortable, except for **Comments**. In **Agent-Extended** view, these columns are not sortable.

Master Schedule Intra-Day: Review Messages (Save) Dialog Box

Use this dialog box to respond to any warnings or errors that the server returned during your last attempt to save an agent's edited schedule.

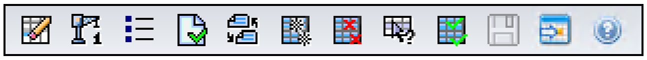
The dialog box includes the following columns and controls:

Team Name	Displays the team to which this agent belongs.
Agent Name	Displays the agent whose schedule generated this message.
Messages	Displays the message type (either **Warning** or **Error**), numeric code, and the message text.
Action	Use each message's drop-down list to select an action to resolve the warning or error: • **Save**—Saves the edited agent schedule. This is the default action for warnings. It is unavailable for agent schedules whose edits generated errors (which are more severe than warnings). • **Fix Later**—Does not attempt to save the agent schedule, but keeps it in the **Intra-Day** grid so that you can further modify it. This is the default action for agent schedules whose edits generated errors. • **Do Not Save**—Discards the change that caused the warning or error to be generated.
OK	Closes the dialog box, applies your selected actions, and retrieves fresh data from the server.
Close	Closes the dialog box without saving or refreshing data.

These errors and warnings are generated by schedule changes that you made manually in the **Intra-Day** view. They differ from **Validation** warnings and errors, which WFM Web generates during the schedule building process.

Master Schedule Agent-Extended View

Use the **Master Schedule Agent-Extended** view to display/edit a single agent's schedule for one week or the schedule planning period. See the toolbar image here and the button descriptions.



Tip

A legend at the bottom of the window indicates the particular type of schedule item that each bar color represents.

You can modify schedule items for individual agents in this view and insert schedule items for multiple agents.

Displaying the Master Schedule Agent-Extended View

To display this view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu, select **Agent Extended**.
4. In the Objects pane, select a single business unit, a single site within a business unit, or a single agent within a site.

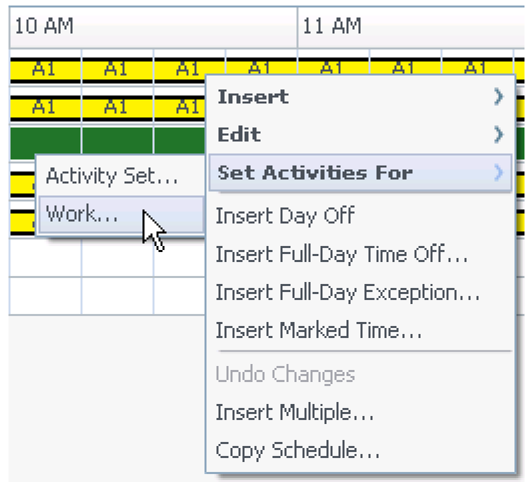
Using the Master Schedule Agent-Extended View Grid

The **Agent-Extended** view includes a grid for the selected agent. Each row in the grid contains a color coded bar. Each bar represents a scheduled day or day off for the selected agent. The table below explains the fields and controls.

Double-click cells containing these items, to edit them: **Shift**, **Activity Set**, **Time Off**, **Meal**. **Break**, **Exception**, **Marked Time**.

Scheduled agents	This indicator shows the number of agent days displayed (based on the selected Mode).
Edited schedules	This indicator shows the number of daily schedules

	you have edited in this view, but not yet saved.
Full-Day View	Select the **Full-Day View** check box to have the grid display the entire day similar to the **Intra-Day** view. If you clear this check box, the grid shows a more detailed view as shown for the Scenario Agent-Extended view. **Full-Day View** also affects the Options dialog box.
Mode:	The starting **Mode** is set to the default of one week, but can be changed to **Schedule Planning Period** (if **Schedule Planning Periods** are in use at your site).
Date:	These controls are the standard date selectors. The grid displays data for the period containing the selected date.
! (*Save Messages/Warnings*)	This column contains icons that provide information about the agents' schedules. • A light-gray pencil icon indicates that the agent's day was edited after scheduling or rescheduling. • A yellow pencil icon indicates an item that generated a warning and you selected the **Fix Later** option. • A green pencil icon indicates schedule items that you have changed but not yet saved. • A red pencil icon indicates an item that generated an error. (Error conditions are more serious than warning conditions.) • A **Swap** icon indicates that the agent's day was assigned by trading or swapping. • A yield icon (upside down red triangle) appears if there are pending changes that have not yet been committed by a user with **Approve Changes** security permission. Double-click a yellow or red icon to review message details and resolve the unsaved items.
Team	This column on the grid indicates the selected agent's assigned team.
colored icon	The column on the grid may display a colored icon. This icon, assigned in **Polices** > Contracts represents the agent's contract.
Agent	This column on the grid indicates each agent's name.
Date	This column on the grid indicates the calendar day.
Weekday	This column on the grid indicates the day of the week. (Select **Day of Week** in the **Options > Column** tab.)
[Timesteps]	These columns indicate the agent's schedule items

	in each timestep. To see greater detail, clear the Full-Day View check box and/or resize the columns. To make changes to the selected agent's schedule, right-click the timestep that you want to modify and then select the command from the shortcut menu. The figure below shows the menu when you right-click the dark blue area within a color-coded bar (unless you change the color). The menu items vary depending on the area clicked.  See Modify Individual Agent's Schedules for instructions and explanations.
[Horizontal scroll bar]	Appears below the table when clearing the Full-Day View check box]causes some timesteps to be hidden off screen. Scroll it to the right to display later timesteps.
Legend	Indicates the particular type of schedule item that each bar color represents.

Customizing the Master Schedule Agent-Extended View Grid

You can resize the **Team**, **Agent**, and **Date** columns. For details, see the Getting Started. You can also add and remove columns.

Site Name	If displayed (using the Options dialog box), this column shows the name of the site for each agent on the selected day.
Shared Transport	If displayed (using the Options dialog box), this column shows the shared transport group participation for each agent on the selected day.
Overtime	If displayed (using the Options dialog box), this column shows the duration of overtime for each agent on the selected day.

Paid Hours	If displayed (using the Options dialog box), this column shows each agent's paid hours for the selected day.
Total Hours	If displayed (using the Options dialog box), this column shows each agent's total hours for the selected day.
Start Time	If displayed (using the Options dialog box), this column shows each agent's start time for the selected day's work.
* (*Comment*)	If this column is displayed (using the Options dialog box), an asterisk (*) indicates that a comment was saved for the indicated agent and schedule day. Double-click a column cell to view or edit comments.
(**Accessible Schedule Details**)	If displayed (using the Options dialog box), you can click this icon to display the Accessible Schedule Details dialog box, which simplifies and organizes commands for vision-impaired users and the screen readers that they use.

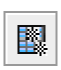
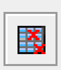
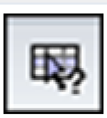
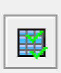
Using the Master Schedule Agent-Extended View Toolbar Buttons

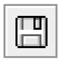
The **Master Schedule Agent-Extended** view toolbar is similar to the **Master Schedule Intra-Day** view toolbar. The only exception is that **Agent-Extended** view does not contain a **Sort** button.

Modifying an Agent's Schedule

You can use the following buttons on the **Actions** toolbar (these commands also appear in the **Actions** menu):

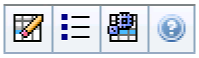
Icon	Name	Description
	Cleanup	If you have **Schedule Clean Up Master** permission, opens the Cleanup Master Schedule window that enables you to delete **Master Schedule** information for selected dates.
	Rebuild intra-day schedule	Opens the Intra-Day Schedule Rebuild Wizard that enables you to rebuild an **Intra-Day** schedule for a specific day or time period within a day for a selected site, team, or agent.
	Options	Opens the Options dialog box that enables you to customize

Icon	Name	Description
		the view. This includes whether to show agent availability, whether to use a 24-hour or 36-hour display, and whether to display or hide the **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Comment**, **Site Name**, **Shared Transport**, and **Accessibility** columns.
	**Auto-Commit**	The **Auto-Commit** toolbar button toggles on and off the auto-commit feature. The feature is also turned on and off by selecting **Auto-Commit** on the **Actions** menu. If it is on, changes are immediately applied to the **Master Schedule**. If it is off, the changes have **Pending** status and can be committed/ approved before they are incorporated in the official version of the **Master Schedule**. If you do not have the **Approve Changes** security permission for the **Master Schedule**, the auto-commit feature is disabled.
	**Swap**	Opens the Swap Agent Schedule Wizard that enables you to swap two agents' schedules.
	**Insert Multiple**	Opens the Insert Multiple Wizard that enables you to insert breaks, meals, exceptions, days off, time off, shift, marked time and work sets for multiple agents or teams.
	**Delete Multiple**	Opens the Delete Multiple Wizard, which enables you to remove multiple items in the **Master Schedule** at one time.
	**Edit Multiple**	Opens the Edit Multiple Wizard, which enables you to edit multiple items in the **Master Schedule** at one time.
	**Commit/Rollback Multiple**	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes (changes entered when auto-commit was off or disabled) into the **Master Schedule** or to remove them and return the **Master Schedule** to its former

Icon	Name	Description
		settings.
	**Save**	Saves any changes that you have made to the schedule. (If the server cannot save all changes, red or yellow icons in the grid's first column indicate the agents for whom you must correct errors or acknowledge warnings. If you make schedule changes in the **Agent-Extended** view and do not click **Save**, you are prompted to save your changes when you select a different module or view, or when you launch certain wizards or child windows.
	**Move to Current Day**	Also known as the *Today* button. Click this button to display data for today.

Master Schedule Summary View

Use the **Master Schedule Summary** view to display statistics about the **Master Schedule**. See the toolbar image here and the button descriptions below.



The summary view provides standard date-selection controls, a Granularity control, a Graph and a Data table.

Displaying the Master Schedule Summary View

To display the Master Schedule Summary view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu, select **Summary**.
4. Select an **activity** from the tree on the Objects pane.

You can select a single business unit, a single site or a multi-site activity or an activity group within a business unit, or a single activity within a site. Making the selections populates the **Data** table.

Setting Granularity

Use this drop-down list to select the **Time Step** increment to display in the grid. Select from one of these three values (in minutes): **15**, **30**, or **60**.

Graph and Data Panes

This view displays its data in a graph (upper portion of the view) and a table (lower portion), instead of on separate tabs.

Graph Pane

The **Graph** pane provides a linear graph for each statistic that you select, with data points for individual timesteps across the selected day.

Show data for

From the **Show data for** drop-down list, select the statistic you want to graph. The options correspond to the Data table's available columns (except that **Difference Calculated** and **Difference Required** cannot be graphed).

Select the **Show Required** check box to display that data on the graph.

Graph

The graph is redrawn to match your drop-down list selection from the **Show data for** drop-down list. Timesteps are shown from left to right. Quantities from bottom to top show the number of interactions, the number of agents, or the expense amount (for **Budget**).

Data Table

The **Data** pane provides a scrollable grid that displays aggregate and per-timestep statistics. The grid's first row displays a daily total or average for each statistic. Each of the remaining rows displays statistics for one timestep.

Grid Columns

The grid provides columns displaying the following statistics and quantities.

- Click **Options**  to display or hide each of these columns, available for selection:

Coverage Scheduled Headcount Scheduled Service Level Scheduled Service Level Forecasted Interaction Volume Scheduled Interaction Volume Forecasted AHT (Average Handling Time) Scheduled AHT Forecasted, Budget Scheduled Budget Forecasted Staffing Calculated	Staffing Required Difference Calculated Difference Required Coverage Published Coverage Difference ASA Scheduled ASA Forecasted Difference [ASA Scheduled - ASA Forecasted] Occupancy Scheduled Occupancy Forecasted	Difference [Occupancy Scheduled - Occupancy Forecasted] Difference [S/L Scheduled - S/L Forecasted] Difference [IV Scheduled - IV Forecasted] Difference [AHT Scheduled - AHT Forecasted] Difference [Budget Scheduled - Budget Forecasted] Deferred Service Level Scheduled Deferred Service Level Forecasted Deferred Service Level Difference Scheduled Queue

See explanations of Optional fields in the "Options Dialog Box" topic.

Time Step	The start time for each timestep, configured by the Granularity setting.
Coverage [Scheduled]	The scheduled staffing coverage for an activity or multi-site activity. Schedule coverage is calculated and displayed in fractional units. For example, if any agent is scheduled to work on three Activities in a 15-minute timestep, that agent may count as 1/3 toward the coverage of each activity.

	The way the scheduling engine splits an agent's time among the activities the agent can work on depends on many factors. Examples include the open hours of each activity, the volume and handle time of each activity, and some other factors such as whether an agent has granted items in the **Calendar**, such as time off or exceptions for any or part of the day.
Coverage [Published]	The schedule staffing coverage, based on the baseline **Master Schedule**.
Coverage [Difference]	The difference between the schedule staffing coverage, based on the current **Master Schedule** and schedule staffing coverage, based on the baseline **Master Schedule**.
Headcount [Scheduled]	The number of agents scheduled (agents scheduled to be seated).
Service Level Percentage Scheduled	The service level percentage that can be achieved given the staffing coverage—assuming that other planned metrics (such as interaction volumes and Average Handling Time) remain unchanged.
Service Level Percentage Forecasted	The service level percentage that can be expected to be achieved based on the number of agents forecast. This may differ than the original service level objective that was stated when the staffing forecast was built due to agent rounding. For example, WFM might forecast a staffing requirement of 12 agents to meet a service level objective of 80% of interactions answered within 20 seconds, but **Service Level Percentage Forecast** might report a higher number, such as 83.48%. This is because 12 was the minimum number of agents required to meet the 80% service level objective but, with that number of agents, the contact center can be expected to achieve a slightly better service level than 80%. With one less agent (11 agents), the contact center would not be expected to achieve the 80% service level.
Interaction Volume Scheduled	The number of interactions that can be handled based on the schedule coverage—assuming that other planned metrics remain unchanged.
Interaction Volume Forecasted	The expected number of interactions, according to the **Master Forecast**.
AHT Scheduled	The **Average Handling Time** per interaction, based on the schedule—assuming that other planned metrics remain unchanged.
AHT Forecasted	The expected **Average Handling Time**, according to the **Master Forecast**.
Budget Scheduled	The budget for the scheduled coverage for the selected day and timesteps, based on the full-time-equivalent (FTE) paid hours per day and the salary specified in the **Forecast** scenario that was published to the **Master Forecast** for this date. (This statistic appears only if you have the access rights to view agents' wage fields.)
Budget Forecasted	The budget for the calculated staffing for the selected day and timesteps, based on the full-time-

	equivalent (FTE) paid hours per day and the salary specified in the **Forecast** scenario that was published to the **Master Forecast** for this date. (This statistic appears only if you have access rights to view agents' wage fields.)
Staffing Calculated	The required number of agents as calculated by WFM, based on the forecast interaction volumes, AHT, and applicable service objectives.
Staffing Required	Optional field. The required number of agents as defined by the user, either by explicitly entering forecast targets or by using a template.
Difference Calculated	The difference between **Coverage [Scheduled]** and **Staffing Calculated**.
Difference Required	Optional field. The difference between **Coverage [Scheduled]** and **Staffing Required**.
ASA Scheduled	Optional field. The **Average Speed of Answer** that you should achieve on this activity, with the number of agents currently scheduled for this activity.
ASA Forecasted	Optional field. The totals/average row for **ASA Forecasted** reports a weighted average, calculated across the open hours and weighted by **Forecasted IV**
Deferred Service Level Scheduled	Optional field. The service level percentage that can be achieved given the deferred staffing coverage&emdash;assuming that other planned metrics (such as interaction volumes and **Average Handling Time**) remain unchanged.
Deferred Service Level Forecasted	Optional field. The service level percentage that can be expected to be achieved, based on the number of deferred activities forecasted.
Deferred Service Level Difference [Scheduled minus Forecasted]	Optional field. The difference between the **Scheduled Deferred Service Level** and **Forecasted Deferred Service Level** statistics.
Scheduled Queue	The scheduled number of interactions in the backlog queue at the end of the period.
Difference [ASA Scheduled minus ASA Forecasted]	Optional field. **ASA Scheduled** minus **ASA Forecasted**
Occupancy Scheduled	Optional field. The **Occupancy** that you should achieve on this activity, with the number of agents currently scheduled.
Occupancy Forecasted	Optional field. The **Occupancy** objective that you should be able to achieve when staffing with the number of agents from the staffing forecast
Difference [Occupancy Scheduled minus Occupancy Forecasted]	Optional field. **Occupancy Scheduled** minus **Occupancy Forecasted**
Difference [S/L Scheduled minus S/L Forecasted]	Optional field. **S/L Scheduled** minus **S/L Forecasted**
Difference [IV Scheduled	Optional field. **IV Scheduled** minus **IV**

minus IV Forecasted]	**Forecasted**
Difference [AHT Scheduled minus AHT Forecasted]	Optional field. **AHT Scheduled** minus **AHT Forecasted**
Difference [Budget Scheduled minus Budget Forecasted]	Optional field. **Budget Scheduled** minus **Budget Forecasted**

Tip

You can display staffing totals in **Full Time Equivalent** (FTE) or man-hours mode in the **Coverage [Scheduled]**, **Staffing Calculated**, **Staffing Required**, **Difference Calculated**, and **Difference Required** columns by adjusting the view settings in the interface. To change the display mode, see Changing the Staffing Display from FTE to Man Hours.

Customizing the Summary View

These commands are available on the **Actions** toolbar (and also on the **Actions** menu):

Icon	Name	Description
	**Options**	Opens the Options dialog box. Enables you to display or hide individual statistics. The following statistics are available for selection: • ASA Scheduled, ASA Forecasted, Headcount Scheduled, Service Level Scheduled, Service Level Forecasted, Interaction Volume Scheduled, Interaction Volume Forecasted, AHT (Average Handling Time) Scheduled, AHT Forecasted, Budget Scheduled, Budget Forecasted, Staffing Calculated, Staffing Required, Difference Calculated, Difference Required, Coverage Scheduled, Coverage Published, Coverage Difference, Difference [ASA Scheduled - ASA Forecasted], Occupancy Scheduled, Occupancy

Icon	Name	Description
		Forecasted, Difference [Occupancy Scheduled - Occupancy Forecasted], Difference [S/L Scheduled - S/L Forecasted], Difference [IV Scheduled - IV Forecasted], Difference [AHT Scheduled - AHT Forecasted], Difference [Budget Scheduled - Budget Forecasted See the Optional field section.
	**Use multi-site activities**	This button becomes enabled when you select a multi-site activity or business unit in the **Objects** tree. Clicking this button causes both tabs to display combined data for all the activities included in the selected multi-site activity or business unit. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Cleanup**	Opens the Cleanup view. Enables you to delete Master Schedule information for selected dates and agents.

Granularity

Select a timestep to apply to the grid: **15** (default), **30**, or **60**. All values are in minutes.

Date

Use the standard date-selection controls to move to other days.

Cleanup Master Schedule Window

Use the **Cleanup Master Schedule** window if you need to remove information from the **Master Schedule** for selected dates and agents. You must have **Schedule Clean Up Master** security permission.

> **Warning**
>
> This feature deletes all previously saved data that was saved for the selected date range and agents. Genesys recommends that you do not use the Cleanup Master Schedule feature unless it is absolutely necessary. If you must remove Master Schedule data, Genesys recommends that, before doing so, you first extract the data to a schedule scenario (using the **Publish Schedule Wizard**), and/or make a backup of the WFM database.

To remove **Master Schedule** information:

1. In the **Cleanup dates** section, select the range of dates for which you want to remove data.
   You can type in the **Start date** and **End date**, or use the up or down arrows to modify the displayed dates. You can also click **Open Popup Calendar** to display a monthly calendar that you can use to jump to other dates.
2. From the **Agents** list, select the agents whose schedule information you want to remove.
   You can expand business units to display their sites and you can expand sites to display their teams and agents. You can select any number of agents. (By default, no agents are selected.)
3. Click **Finish** to remove the specified **Master Schedule** information, or click **Cancel** to close the window without changing the **Master Schedule**.
   As the cleanup starts, the progress bar displays additional information in brackets
   - Number of selected agents.
   - Number of selected teams for a particular site.

   If an asterisk (*) is displayed instead of a number, this indicates all agents or teams under the site were selected.

Filter By Agent Properties

You reach this dialog box by clicking the **Filter** button in the Master Schedule Changes Approval dialog box.

Use this dialog box to filter the display by specific agent properties. You can choose from two lists of **Contracts** under the current site:

All check boxes are selected by default.

1. Clear the check boxes for the items that you want to be excluded from the filter.
2. Click **OK** to apply your choices.

Master Schedule State Group Totals

Use the **Master Schedule State Group Totals** view to display coverage statistics for every timestep in a selected day. See the toolbar and the button descriptions below.

This view can help you to determine the cause of an overstaffing or understaffing during the day. For example: Although your site has 400 agents, a 3 PM traffic surge left you understaffed. How did it happen? Using this view, you can pinpoint the number of agents who are on breaks, in meetings, and otherwise not on duty, at 3 PM. You can use this information to justify adjustments such as moving agents' breaks or canceling a team meeting.

You can also:

- Compare Calculated and Required Staffing, and schedule coverage, with schedule-state-totals data.
- Anticipate shrinkage and estimate how much of it (in the form of meetings and training, for example) can be assigned and stay within your forecast.
- Select agents with specific scheduled states who are contributing to a specific shrinkage types.

This view displays its data in a graph (upper portion of the view) and a table (lower portion), instead of on separate tabs. You can also specify that WFM display its data not only for days, but also for weeks and months. Both data displays show the differences between the **Schedule** and the **Forecast**, for each timestep during the selected time period. The **Graph** also shows totals as a flat line, because the lines representing forecasted and scheduled shrinkage can be of different shapes.

Displaying State Group Totals

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu, select **State Group Totals**.
4. Select the objects from the Objects pane whose **State Group Totals** you want to display.
   You can select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.
5. Click **Get data**.
6. Select an item from the **Show Data For** drop-down menu to control what data is displayed in the grid:
   - **Scheduled States Totals**—Display all schedule-state groups (and their data), of all types, but exclude shrinkage-related information. This is the default display.
   - **Total Shrinkage**—Display all schedule-state groups (and their data), but exclude the type **none**.
   - **Planned Overheads**—Display only schedule-state groups (and their data) with the type **planned**

overheads.

- **Unplanned Overheads**—Display only schedule-state groups (and their data) with the type **unplanned overheads**.

Changing the Default Time Zone for Schedule State Totals

When displaying schedule state totals, if you select agents from the several sites, WFM uses the business unit's time zone by default. If you select agents from only one site, WFM uses the site time zone by default. However, in the **State Group Totals** view, selecting **Show data for**, enables you change the default time zone by selecting a different one, by clicking the **Time Zone** drop-down list.

> Tip
>
> To see the **View Intra-Day Schedule** context menu in step 4 in the next two procedures, you must right-click a cell with a value other than `0`.

Selecting Agents Contributing to Specific Shrinkage

1. From the **Master Schedule** menu, select **State Group Totals**.
   The Show data for field is populated with Schedule States Totals by default (do not change it).
2. Select a business unit, site, and activities and click **Get Data**.
3. Right-click any cell that contains a value.
4. Click the **View Intra-Day Schedule** context menu.
   A list of agents who are contributing to the shrinkage is displayed.
5. Select the agents whose schedule you want to view.
6. Optionally, check the box **Open Intra-day schedule in a new window**, and click **OK**.
   This opens the Intra-Day view in a separate window, leaving the the Schedule State Totals view open behind it.
7. Or, leave the box **Open Intra-day schedule in a new window** unchecked, and click **OK**.
   This opens the Intra-Day view, replacing the Schedule State Totals view.

The Intra-Day view now shows the selected agents' schedules.

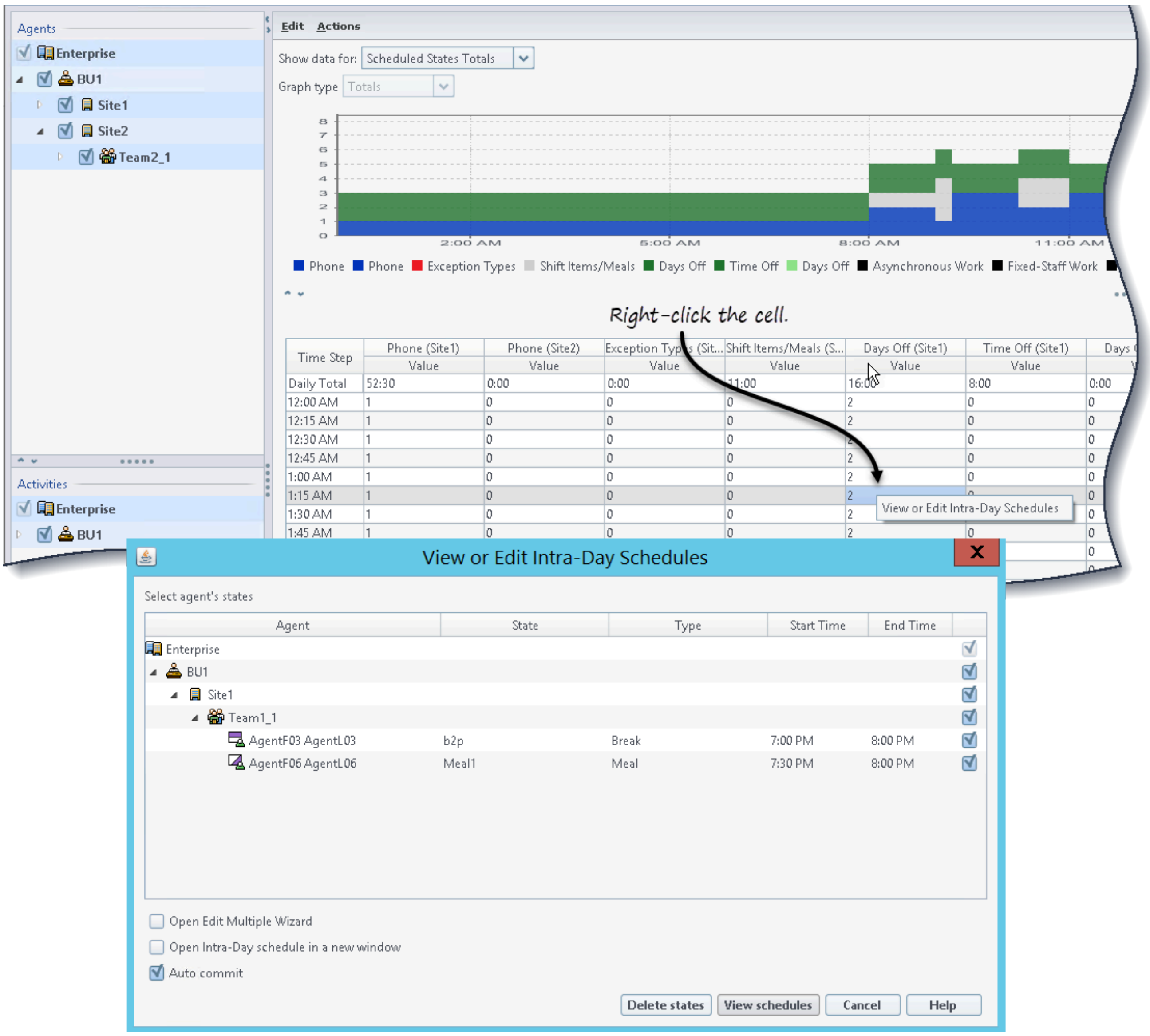
Viewing State Group Totals Grouped by Name

1. From the **Master Schedule** menu, select **State Group Totals**.
   The Show data for field is populated with Schedule States Totals by default (do not change it).
2. Select a business unit, site, and activities and click **Get Data**.
3. Click the **Group by names** check box.
   When this check box is selected, and there are Schedule State Groups with the same name under different sites, WFM displays their schedule state group totals in a single column with the same name.
4. Right-click any cell that contains a value.
5. Click the **View Intra-Day Schedule** context menu.
   A list of the agents is displayed.
6. Select the agents whose schedule you want to view.
   The Intra-Day view opens, replacing the Schedule State Totals view.

The Intra-Day view now shows the selected agents' schedules.

Viewing and Editing Agents' Intra-Day Schedules

Use this procedure to view and edit multiple agents' schedules in the Intra-Day schedule or select multiple agents who are contributing to schedule shrinkage.



To view and edit agents' schedules:

1. In the data pane of an open scenario, select the time step or row for the schedule state you want to edit.
   The View or Edit Intra-Day Schedules Wizard opens with all agent states selected, by default.
2. Select/deselect agent states, as needed, and then:
   - Click **View schedules** to open the agents' Intra-Day schedule.
   - Click **Delete states** to delete the select agents' states.
   - Click **Cancel** to cancel the action and close the wizard.
3. Optionally, you can use the following check boxes:

- **Open Edit Multiple Wizard**—Opens the wizard and the Intra-Day schedule after you click **View schedules**. See the Edit Multiple Wizard.
- **Open Intra-Day schedule in a new window**—Opens the agents' Intra-Day schedule in a separate window after you click **View schedules**.
- **Auto commit**—Automatically commits the changes to the schedule. This box is checked, by default. Unchecking this box indicates that changes will be committed to the schedule manually.

> Tip
> When using the Edit Multiple Wizard, you cannot edit or delete the following state types: Activity, Day Off, Full-Day Exception, or Full-Day Time Off.

Graph Controls

The **Graph** displays data for the object(s) selected in the Object pane. Use the controls in the Data pane to further configure the data display.

Graph Type *drop-down menu*	Select a display scheme for the graphical data. (This menu is disabled and reset to the default setting if the **Scheduled States Totals** value is selected in the **Show Data For:** drop-down menu).
Totals	Display the data in a line graph, that shows stacked schedule-state groups information. Default. If the **Show Coverage and Forecast Information** toolbar icon is toggled on, the graph displays this data, in separate lines: **Schedule Coverage**, **Forecasted Staffing Calculated**, and **Forecasted Staffing Required**.
Comparison	Display percentage data for a specific schedule-state group or for planned/unplanned overheads, in a line graph that compares it to forecast overheads data. The graph displays two percentage data series as lines, in the format that you select in the Targets drop-down menu. Tip If the **Show Coverage and Forecast Information** toolbar icon is toggled on, the graph displays two additional data series of forecast data for the object(s) that you selected on the Object pane.
Variance	Display a bar graph of positive or negative values for each timestep, if one of the following is selected in the **Object** area’s activity tree: a single-site activity, a single site, a single multi site activity, a single business unit.

Period	Select **Day**, **Week**, **Month**, or **Planning Period** to specify the granularity of the display.
Targets *drop-down menu*	This menu appears only when the **Graph Type** menu selection is Comparison; use it to select percentage data to compare. Select a format for comparing percentage data:
Total Planned	Display scheduled planned overheads totals data and forecasted total planned overhead data. Not available if the selected value in the **Show data for:** menu is **Unplanned Overheads**.
Total Unplanned	Display scheduled unplanned overheads totals data and forecasted total unplanned overhead data. Not available if the selected value in the **Show data for:** menu is **Planned Overheads**.
List of schedule-state groups	Display a line graph of data for the named **Schedule State Group**. Names in this list are followed by a site name if more than one site is selected on the Object pane. Important The **Schedule State Groups** list depends on the selection in **Show data for:** menu. If you selected **Planned Overheads** in the menu, then only planned **Schedule State Groups** are shown in the list. If you selected **Unplanned Overheads** in the menu then only unplanned **Schedule State Groups** are shown in the list.

Grid Layout and Controls

The columns in the **Master Schedule State Group Totals** table correspond to the configured schedule-state groups. Use the **Schedule States** tab in State Groups Filter to specify which columns appear in the table.

Grand Total	This column displays the grand total for all selected agents (not just for the visible schedule-state groups). It never contains the sub column % (because its value is always 100%). Values in this column depend on the selection in the Show data for: menu.
Scheduled States Totals	This column displays the totals for visible schedule-state groups for the selected agents, regardless of their type.
Planned Overheads	This column displays the planned overheads total for all selected agents. It is hidden if Scheduled States Totals or Unplanned Overheads is selected in the Show data for: menu.
Unplanned Overheads	This column displays the unplanned overheads total for all selected agents. It is hidden if Scheduled States Totals Planned Overheads is

	selected in the Show data for: menu.

Important

- An additional row displays the daily total for each visible column.
- An agent who is in multiple schedule-state groups during an interval, is prorated in the grid by the fraction of the interval that the agent is in each state group. For example, an agent on break for 5 minutes and at work for 10 minutes might be listed in the Break cell as .33 and in the Work cell as .67 (Note that the terms *Break* and *Work* are used here as examples of schedule-state group names, and may not correspond to the schedule-state groups that are configured for your WFM environment.)
- The columns in the **Master Schedule State Group Totals** data table, and the stacked lines in the graph, correspond to the configured schedule-state groups. Select **Filter**  in the toolbar, and use the **Schedule States** tab to specify which columns appear in the table and which lines appear in the graph.

Data Controls

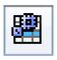
Show data for: *drop-down menu*	Select from the menu, a data-display scheme to apply to the grid: • **Scheduled States Totals**—Displays totals for the schedule-state groups of the currently selected agents, regardless of type. Select this option to disable the check boxes described below, and displays the data in grid columns that are selected in the **Schedule States** tab of the filter dialog. • **Total Shrinkage**—Displays the total shrinkage for the schedule-state groups (and their data), excluding the type none. • **Planned Overheads**—Displays the planned overheads total for all selected agents. Select to display the data in grid columns, grand total, and sub columns that match the selected check boxes below. • **Unplanned Overheads**—Displays the unplanned overheads total for all selected agents. Select to display the data in grid columns, grand total, and subcolumns that match the selected check boxes below.

	Tip Each data-display scheme includes a **Time Step** column.
Grouped by name *check box*	Select this check box to group the agents by name when displaying schedule state totals.
Value *check box*	Select this check box to display the column that shows coverage value in the grid. This check box is disabled but checked if you select **Scheduled States Totals** in the **Show data for:** menu.
Value % *check box*	Select this check box to display the column that shows coverage percentage in the grid. The percentage value is calculated relative to the grand total. This check box is disabled and not checked if you select **Scheduled States Totals** in the **Show data for:** menu.
Compare with forecast *check box*	Select this check box to display the column that shows percentage data of overhead from the forecast in the grid, shall be presented in grid. Enabled and applicable only if the same conditions are met as for the toggle action Show Coverage and Forecast Information. This check box is disabled and not checked if you select **Scheduled States Totals** in the **Show data for:** menu.
Value *cells*	Right-click in any cell (with a value other than zero) to open the View Intra-Day Schedule context menu.

Actions Menu/Toolbar Buttons

These commands are available on the **Actions** toolbar (and on the **Actions** menu):

Icon	Name	Description
	**Time Zone**	In the **State Group Totals** view, when showing data for schedule state totals, use this drop-down list to change the default time zone by selecting a different one.
	**Cleanup**	Opens the Cleanup window. Enables you to delete **Master Schedule** information for selected dates and agents.
	**Show Coverage and Forecast Information**	This toggle controls if additional coverage and forecast information is displayed, and is enabled only if one of the following is selected in the

Icon	Name	Description
		Object area's **Activity** tree: a single-site activity, a single site, a single multi-site activity, a single business unit.
	**Use Multi-Site Activities**	This button becomes enabled when you select a multi-site activity or business unit in the Objects pane. Clicking this button displays combined data for all the activities included in the selected multi-site activity or business unit. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Filter**	Opens the State Groups Filter dialog box.
	**Options**	Opens the Options dialog box, where you can show or hide the columns **Total Planned** and **Total Unplanned** in the grid display; and change the colors that are used in **Coverage** and **Forecast** graphs.
	**Save As Template**	Saves the current selections as a forecast template of type **Overheads**. Click this icon (or select the command from the **Actions** menu) to display the New Forecast Template dialog box. Required settings: **Graph Type**=**Comparison**, **Period**=**Week**. Important The **Save as Template** command is not visible and the user cannot edit **Overheads** if he/she has no security rights to the **Forecast** module.

Master Schedule State Group Totals: Options Dialog Box

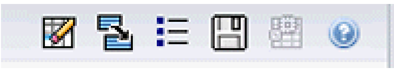
Use the **Options** dialog box to specify the columns that the **Master Schedule State Group Totals** view display.

1. Click **Options**  on the **Master Schedule State Group Totals** view's **Actions** toolbar.
   The Options dialog box opens. The Columns tab is selected by default.
2. Select the check boxes for the items that you want to be displayed.
3. Clear the check boxes for the items that you want to be excluded from the display.
4. Click the **Options** tab to display and modify the current **Coverage** and **Forecast Graph** color choices.
5. Click any of the color setting bars to open a color tool for that setting:
   - **Coverage Scheduled**
   - **Forecast Staffing Calculated**
   - **Forecast Staffing Required**

   This tool is described in the Configuration module topic.
6. Click **OK** to apply your choices.

Master Schedule Overtime Requirement View

Use the **Master Schedule Overtime Requirement** view to enter and edit overtime requirements. It is available for the **Master Schedule** only. See the toolbar image here and the button descriptions below.



This new overtime requirement module shares the same or similar interface components and their functionality as other main forecast views, such as **Volumes**:

The **Object** pane presents site and multi-site activities.

1. Select a **business unit**, **multi-site activity**, **site**, or **activity** from the tree in the Objects pane.
2. Select **Month** (the default) or **Week** from the **Period** drop-down menu (above the grid in the **Data** pane) to specify the granularity of data that is displayed in the grid.
3. Enter or select a date in the date selector (above the grid in the **Data** pane) to specify what days' data are displayed in the grid. This choice also specifies the granularity of the date selector itself.

The grid reacts immediately to each of these selections. For example:

- If the **Period** value is **Month**, each row is the date of the first day in a week of the month in the date selector, and each column is a day of that week.
- If the **Period** value is **Week**, each column is a single day's date of the week in the date selector, and each column is a day of that week and each row is a 15-minute time step of that single day.

Using Options Dialog to Enable Subcolumns

You can use the Options dialog to enable sub-columns for each column.

Overtime

This sub column contains its own sub columns:

- **Required** (editable)—The daily total for **Overtime Required** is calculated not as the simple total of timestep values, but as an **Full-Time Equivalent** (FTE). This column is displayed at all times.
- **Scheduled** (read-only)—This column is displayed by default but can be unchecked in the **Options** dialog.

Important

> You can display staffing totals in **Full Time Equivalent** (FTE) or man-hours mode in the **Master Schedule Overtime Requirement** view by adjusting the view settings in the interface. To change the display mode, see Changing the Staffing Display from FTE to Man Hours.

Staffing

This sub column contains its own sub columns:

- **Calculated**—read-only.
- **Required**—read-only.
- **Coverage**—read-only.
- **Variance**—read-only.

Formulas

- **Graph Value** = Schedule activities coverage (in single skill equivalents [sse]) - calculated forecast (sse) - anticipated non-working overhead (sse)
- **Anticipated Non-Working Overhead** (sse) = schedule state total (sse) * total forecasted non-working overhead (percentage)/100 - total scheduled non-working overhead (sse). If anticipated non-working overhead (sse) is less than `0`, then anticipated non-working overhead = `0`.

> **Important**
>
> In the formulas above, there are two different values called coverage . The first one is the **Schedule Activity** coverage, which is normal activity coverage (indicated by a red line in **Intra-Day Schedule** graph). The other is the **Schedule State** total, which is the sum of all **Schedule States**, except those belonging to the group of type ***<none>*** .

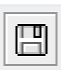
Difference

This sub column contains its own sub columns:

- **Calculated**—Calculated staffing – read-only.
- **Required**—Required staffing – read-only.

Actions Menu and Toolbar Buttons

The following commands are available on the **Actions** toolbar (and also on the **Actions** menu):

Icon	Name	Description
	**Cleanup**	Opens the Cleanup dialog. Enables you to delete **Master Schedule** information for selected dates and agents.
	**Convert variance to overtime required**	Enabled only when you select **Weekly** in the **Period** drop-down list, select an activity or multi-site activity, and the **Staffing Variance** is present in the data grid. Click **Convert staffing variance to overtime required** to open the dialog box and find the **Do not decrease overtime requirement** check box: • **Do not check**—If you want the **Overtime Required** to change to a value that is calculated by the following formula: [**Overtime Scheduled** - **Staffing Variance**] for all timesteps that have a negative value for **Staffing Variance**. • **Add a check mark**—If you want the **Overtime Required** to change to value that is calculated by the following formula: [**Overtime Scheduled** - **Staffing Variance**] for all timesteps that have a negative value for **Staffing Variance** and an **Overtime Required** value that is less than [**Overtime Scheduled** - **Staffing Variance**].
	**Save**	Saves your changes.
	**Use multi-site activities**	Enabled when you select an **Enterprise** or a **Business Unit**, and disabled when you select a **Multi-Site Activity**. Clicking this button adds to the grid multi-site activity data for the selected business unit. If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Icon	Name	Description
	**Options**	Opens the Options dialog. Enables you to display or hide individual statistics.

Master Schedule Overtime Requirement: Options Dialog

Use the **Options** dialog to specify the columns that the **Master Schedule Overtime Requirement** view displays.

1. Click the **Options** button  on the **Master Schedule Overtime Requirement** view's **Actions** toolbar.
   The **Options** dialog box opens. Only the **Overtime Scheduled** check box is selected by default.
2. Select the check boxes for the column(s) that you want to be included in the display:
   - **Overtime Scheduled**
   - **Staffing Calculated**
   - **Staffing Required**
   - **Staffing Coverage**
   - **Staffing Variance**
   - **Difference Calculated**
   - **Difference Required**
3. Click **OK** to apply your choices.

Master Schedule Changes Approval

Viewing and using the **Master Schedule Changes Approval** view requires that you have **Schedule Approve Changes** security permission enabled. If you do not, you cannot see this view in the **Modules** tree.

Changes to the **Master Schedule** that are made by users with the **Schedule Approve Changes** security permission disabled are first entered in **Pending** mode. Use the **Master Schedule Changes Approval** view to accept or reject these pending changes.

Alternatively, for pending changes that you made, you can:

- Use the Commit/Rollback Multiple Wizard to commit or rollback all pending changes for selected agents on selected dates.
- Use the **Schedule Intra-Day** views to directly save or delete all items in an agent's schedule day that have **Pending** status. To do so, right-click the row showing the agent's schedule and then select **Commit** or **Rollback**.

Displaying Pending Changes

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu, select **Master Schedule Changes Approval**.
4. On the Objects pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.
   You can expand business units to display their sites, and you can expand sites to display their teams and agents. You can select multiple sites, teams, and agents, but just one business unit.
5. From the **Period** drop-down list, select the time period to view. You can select **Daily** or **Weekly**.
6. From the **Users** drop-down list, select which user's changes you want to see. Select **All** to see all pending schedule changes. **All** is selected by default.
7. Use the date selectors to change the schedule dates to view.
   By default, if you chose to view the **Weekly** period and select a day other than the first day of the week, the display begins on the first day of the week containing the day you selected.
8. Click **Get data**.
   The top pane of the Changes Approval view displays a table containing the pending schedule changes made by the users you selected. The columns in the table are sortable.
   The columns in the Pending Changes table are the following
   - **Date**—The schedule date that has been changed.
   - **User**—The user who made the change, or **Changed by Agent** if an agent made the change.
   - **Agent**—The agent whose schedule has been changed.

- **Site**—The site to which the affected agent belongs.
- **Team**—The team to which the affected agent belongs.

Approving or Rejecting Pending Changes

1. Select one or more schedule changes in the pending changes table.
   The current version of each affected agent's schedule, and the agents' schedules as they would appear with the changes incorporated, appear in the **Original Schedule** and **Modified Schedule** panes below the table.
   - **Original Schedule** pane—Shows the agent's schedule as it appears in the current version of the **Master Schedule**.
   - **Modified Schedule** pane—Shows the agent's schedule with the pending changes included.

   These panes contain the following columns:
   - **Item**—The name or type of the changed item. For shifts and activity sets, this column displays all of the associated activities.
   - **Start Time**—The start time of the changed item. For full-day items, this column is empty.
   - **End Time**—The end time of the changed item. For full-day items, this column reads **Full Day**.
   - **Paid Hours**—The number of paid hours in the schedule.
   - **Colors**—Items that do not match in the original and edited schedules appear in specific colors. Non-matching items in the original schedule pane are marked in blue. Non-matching items in the **Modified Schedule** pane are marked in green.
2. To see whether the changes violate any schedule constraints, select the change in the pending changes table and then click **Validate**.
   The Review Validation Messages dialog opens. See Schedule Validation for a list of possible error and warning messages and their descriptions.
3. After reviewing the changes, select one or more of them and then click **Accept** to save the changes in the **Master Schedule** or **Reject** to discard them.
   The **Master Schedule** is updated to include all accepted schedule changes.

Warning

If you accept or reject any pending change for an agent, all pending changes for that agent are accepted or rejected.

Review Validation Messages Dialog

Use the **Review Validation Messages** dialog to view any warnings or errors that the server returned when you validated the selected pending changes to the **Master Schedule**.

The dialog contains the following columns and controls:

Date	Date of the message.
Agent	The agent whose schedule change generated the message.
Team	The team to which the agent whose schedule is being changed belongs.
Message	The message type (either Warning or Error), numeric code, and the message text.
OK	Closes the dialog.

Important

These errors and warnings would be generated if you validated the selected pending schedule changes. They differ from Validation warnings and errors, which WFM Web generates during the schedule building process.

Overtime Bidding

Rather than simply assigning overtime hours to agents, you can create Overtime Offers and enable agents to select the overtime hours they most prefer. After you customize and open the offer for bidding, agents can view it in the Web for Agent's interface and enter bids for their desired overtime slots. WFM then processes the bids, using the hierarchy system of seniority or rank that you have chosen.

> **Important**
> To configure objects and change settings in the **Overtime Bidding** view, you must have the appropriate role privileges. See Schedule Role Privileges.

How Overtime Bidding Works

Complete these steps to set up WFM Overtime Offers and initiate the bidding process. Click the links in the summary steps below, to read details.

1. **Obtain user role privileges**—Ensure that an administrator (or someone with administration privileges) has given you the proper role privilege, enabling you to access Overtime Bidding. See Assigning Roles to Users and Schedule Role Privileges.
2. **Create an overtime offer**—Create the offer and sets its properties.
3. **Open the overtime offer for bidding**—Open the offer, making it visible in the WFM Web for Agents interface. You can edit the Overtime Offer at any time.
4. **Wait for agents to submit bids**—Wait for agents who are associated with (can see) the Overtime Offer to submit their requests for overtime slots, including the desired start and end time for each slot. Agents can enter multiple bids within the same Overtime Offer, setting the preferred priority for each slot. Agent can enter overlapping time intervals or slots.
5. **Initiate the overtime scheduling process**—Start the overtime scheduling process; at the top of the **Overtime Offers** pane, click Initiate scheduling process.

WFM Processes Bids for Overtime Scheduling

WFM begins the overtime scheduling process, using the associated agents list to select agents one-by-one, based on ranking order, and processing their overtime requests, based on the priority specified by the agent.

WFM schedules the slot if:

- The requested overtime is under the overtime requirement for activities associated with the Overtime Offer.

- Rules and constraints configured within Overtime Offer are satisfied
- Agents receive valid schedules based on existing constraints, meaning they do not generate schedule warnings.

After WFM finishes the overtime scheduling process, agents' schedule are committed to the Master Schedule.

Overtime Offer Properties

You'll find the following settings and controls in the **Overtime Offers Properties** pane:

- **Name**—Enter a name for the overtime offer. The name must be unique in the Configuration database.
- **Start Date and Time**—Enter the start date and time for the overtime offer. This is the earliest date/time for which agents can submit bids for overtime.
- **End Date and Time**—Enter the end date and time for the overtime offer. This is the latest date/time for which agents can submit bids for overtime.

> ### Tip
> **Create Overtime Offers that are less than 6 weeks. WFM does not process or save offers that exceed 6 weeks.**

- **Criteria**—Select the criteria that WFM will use to prioritize the processing of agents' bids. For example:
  - Rank
  - Seniority
  - Seniority and Rank
  - First come, first serve
- **This Overtime Offer is open** *check box*—Check this box to open the overtime offer and make it visible to agents. You can save the offer without checking this box and check it later when you are ready to open the offer.

ASSIGNS section:

- **Activity/Multi-Site Activity**—Use the radio buttons to select an activity or multi-site activity that agents will work on during the hours of the overtime offer. Click **Edit** to open a list of activities or multi-site activities, select one, and click **Apply** . Click the **x** on an existing activity/multi-site activity to clear this field.
- **Marked Time** *drop-down list*—Select the Marked Time that will identify the assigned overtime activity/multi-site activity in schedules.

RULES AND CONSTRAINTS section—Enter values in the format `hh:mm` in this section:

- **Minimum slot size**—The minimum slot size of any one agent bid.
- **Maximum slot size**—The maximum slot size of any one agent bid.
- **Maximum agent overtime per day**—The maximum amount of overtime per day that a single agent can work.
- **Maximum total overtime per day**—The maximum total amount of overtime per day that all agents can work.
- **Maximum total agent overtime**—The maximum amount of overtime that a single agent can work.
- **Maximum total overtime**—The maximum total amount of overtime that all agents can work.

COMMENTS section—Enter any relevant comments or details about the Overtime Offer.

Managing Overtime Offers

At any given time, you might have more than one Overtime Offer open or in progress. WFM makes it easy for you to manage Overtime Offers by providing intuitive controls and views, enabling you to perform the following tasks:

- Create, edit, delete, or copy offers.
- Associate agents and sites with offers.
- Disassociate or remove agents and sites from offers.
- View bid slots for selected agents and decline bid requests.
- Initiate the overtime scheduling process.
- Edit the **Properties**, **Agents**, and **Sites** settings for a selected offer by clicking the tab, making the necessary changes and then, saving them.

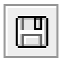
Creating Overtime Offers

Create Overtime Offers that are less than 6 weeks only. WFM displays a validation error if an offer exceeds 6 weeks and does not saved it.

Link to video

To create an overtime offer:

1. Go to **Schedule** > **Overtime Bidding**.
2. In the **Objects** pane, select a business unit or a site and then, click 

.
3. In the **Overtime Offers** pane, click **New**  .
The Overtime Offer Properties pane opens.
4. Enter a name for the Overtime Offer.
By default, the Name field is already populated with a unique name when you select New. The name includes a number to ensure that each newly created Overtime Offer has a unique name in the Configuration database. You can change this name, but it must remain unique to prevent duplicate name errors from occurring.
5. Continue setting the properties as described in Overtime Offer Properties.
6. When finished, click **Save**  .

> **Tip**
> If the list of Overtime Offers becomes long, find offers quickly by entering criteria into the **Search** field, or by using clicking **Sort** and selecting one of three columns to sort on: **Name**, **Start**, **End**. Alternatively, sort any of these columns in ascending or descending order, by clicking the column header.

After you save the Overtime Offer, WFM displays the **Agents** tab, enabling you to associate agents with this offer. Also, use the **Sites** tab to associate sites with this offer.

Editing Offers

To edit an overtime offer:

1. In the **Overtime Offers** pane, select the offer you want to edit.
2. In the **Overtime Offer Properties** pane, make the necessary changes.
3. Click **Save** .

Deleting Offers

To delete an overtime offer:

1. In the **Overtime Offers** pane, select the offer you want to delete.
2. Click **Delete** .
3. When the **Confirmation** dialog opens, click **Yes** to delete the offer, or **No** to cancel the action.

Using Copy to Create Offers

To create an overtime offer by copying an existing offer:

1. In the **Overtime Offers** pane, select the offer you want to copy.
   The Associate
2. Select the Business Unit that you want to associate with this offer and click **Apply** .
3. Rename the offer and change any other property settings, as required.
   The Overtime Offer name must be unique.
4. Click **Save** .

Associating Agents with Offers

You can associate agents in two ways: By selecting all agents skilled in the activity you specified for this Overtime Offer or by choosing agents from a list. Note that the controls used to add and remove agents from a list are not visible when you select the option **Use all agents skilled for the selected activity**.

To associate agents with an overtime offer:

1. Click the **Agents** tab.
2. Check the **Use all agents skilled for the selected activity** check box.
   The Agents section of the pane is populated only with agents who are skilled in the specified activity. WFM selects these agents automatically.
3. Optionally, click **Add Agents**  to select agents from a list.
   The Available Agents pane opens these columns
   (the agents') **Last name**, **First name**, **Site**, and **Team**.
4. Select the agents you want to associate with the Overtime Offer and click **Assign and save** .

This procedure is also demonstrated in the video Creating Overtime Offers above.

Using Search and Sort to Find Agents

If the list of agents on the **Agents** tab or in the **Available Agents** pane becomes long, find agents quickly by clicking **Sort** :

- Select one of three columns to sort on the **Agents** tab: **First name**, **Last name**, **Site**.
- Select one of four columns to sort in the **Available Agents** pane: **First name**, **Last name**, **Site**, **Team**.

You can also use **Search** to find agents in long lists by clicking the **First name** or **Last name** radio buttons and then, entering the agent's name, or enter other search criteria

Removing Associated Agents from Offers

To remove agents associated with an overtime offer:

1. In the **Agents** tab, click the row of the agent that you want to remove.
2. Click **Remove agents** .
3. When the **Confirmation** dialog opens, click **Yes** to delete the agent, or **No** to cancel the action.

Viewing Bid Slots for Agents

To view bid slot for an agent:

1. In the **Agents** tab, click the row of the agent whose bid slots you want to see.
   The Bid Slots pane opens, showing bid information for the selected agent in four columns
   - **Bid** (priority)
   - **Start** (date/time)
   - **End** (date/time)
   - **Status** (of the bid)

Declining Agents' Bid Requests

To decline an agent's bid request:

1. Click the **Agents** tab and select the agent whose bids you want to view and decline.
   The Bid Slots pane opens displaying a list of the agent's bid requests.
2. Select the row containing the bid you want to decline.
   The Bid Slot Details pane opens with the following information:
   - **The schedule date (on which agents insert bid slots)**
   - **The bid slot start date and time**
   - **The bid slot end date and time**
   - **The priority number**
   - **The status**
   - **The reason (or warnings that appear when agents insert bid slots or during processing)**
   - **The comments associated with the bid slot**
3. Click **Decline** .
4. In the **Confirmation** dialog that opens, click Yes to proceed or No to cancel the action.
   If you select Yes, the status in the Bid Slots pane changes to Declined.
5. To continue with another bid slot or another agent, click **Close**  to return to the **Agents** tab.

Associating Sites with Offers

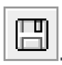
To associate sites with an overtime offer:

1. Click the **Sites** tab.
2. Check the sites that you want to associate with the offer.
   If you want to select all sites, select the top check box named Site.

This procedure is also demonstrated in the video Creating Overtime Offers above.

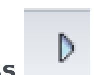
Removing Associated Sites from Offers

To remove sites associated with an overtime offer:

1. In the **Sites** tab, clear the check box beside the site(s) you want to remove or disassociate from the offer.
2. Click **Save** .

Initiating the Overtime Scheduling Process

To start the overtime scheduling process:

1. At the top of the **Overtime Offers** pane, click **Initiate scheduling process** .
2. When the **Confirmation** dialog opens, click **Yes** to begin the scheduling process or **No** to cancel the action.
   If you select Yes, a Processing dialog opens with a progress bar indicating that WFM is processing the agents' requests.

After WFM processes all agents' requests for overtime and schedules them, the Overtime offer is closed and WFM clears the check box **This Overtime Offer is open**. Agents who submitted requests will see them as **Resolved** in the Web for Agents UI and the Overtime offer status as **Closed**.

Continuous Processing of Overtime Offers

You can enable WFM to continuously process Overtime Offers, which have FIFO selected for agent bid ranking criteria. Continuous, automatic processing is enabled by setting a configuration option in the WFM Server application, which specifies the time interval between overtime bidding processes. When enabled, there's no need to manually initiate the scheduling process, as Overtime Offers stay open and WFM does not automatically clear the **This Overtime Offer is open** check box to close the offer (as it does when the process is manually initiated).

For information about how to enable this feature, see the *Workforce Management Administrators Guide*.

Schedule Bidding

WFM's Schedule Bidding feature enables a workforce planner to create schedules with no agent names, and then distribute those schedules to agents via the Web, so that agents can rank their most desired and least desired schedules.

Schedule Bidding enables contact centers to comply with certain labor union regulations that require that the most senior agents, or the most highly-ranked agents, get the schedules they most desire. Even if your contact center does not have these labor regulations, it may still be a process that could provide business value to you. It is a way to empower agents to have more input into the schedules they will be given, and therefore could be used to increase morale within the contact center and reward high-performing agents.

How Bidding Works

Instead of simply assigning schedules to agents, the Supervisor designs and builds a schedule scenario. Then, agents can view the scenario and enter bids for their most desired, and most unwanted, shifts. Finally, the Supervisor can auto-assign or manually assign schedules to agents based on their bids, using a hierarchy system of seniority or rank.

Click links in the summary steps below, to read details.

1: Setting Up Bidding

a. Someone with administration permissions must verify that **Schedule Bidding** is enabled. To do so, make sure that the AllowBidding configuration option is set to **true** (the default setting) in the AgentBidding section of the WFM Web application.

b. The Supervisor creates and configures a bidding scenario. Steps include creating a forecast and then a schedule for specific activities and profile agents, then deciding which agents can bid and when.

   This opens the bidding process and makes the schedule options visible to agents.

> **Important**
> During the **Schedule Bidding** period, a scenario's site has the status **Open for Bidding**. Any action or operation that would alter schedules for that site is disabled. This includes (but is not limited to) these actions: direct schedule editing, insertions or deletions, clean up or extraction from the **Master Schedule**, schedule rebuild or optimization.

2: Bidding on the Schedule

a. Agents examine the bidding scenario options and submit their bids.

b. The bidding period closes when the Bidding End Date arrives. Agents can not access the closed bidding scenario.

3: Resolving the Bids

a. The Supervisor reviews schedule bids. The Supervisor might want to manually modify or assign schedules to agents.

b. The Supervisor starts the auto-assignment wizard. The wizard assigns schedules to agents.

c. The Supervisor reviews results of auto-assignment. The Supervisor might want to manually modify or reassign schedules.

4: Finalizing the Schedule

a. The Supervisor publishes the bidding scenario to the **Master Schedule**.

b. After all schedules have been assigned to real agents, the Supervisor can run a Schedule Bidding Report.

How the Auto-Assignment Wizard Works

It's important to understand how WFM's schedule bidding auto-assignment wizard works, otherwise, it might appear that agent rankings for granting bids is incorrect in some cases.

The wizard's algorithm makes two passes through all bids. Here's how it works:

1. The wizard first processes Desired bids only for all agents (higher ranking agents first).
2. The wizard then processes agents without assigned schedules—agents whose Desired bids were not granted or agents who have no Desired bids—taking into account Undesired bids for shifts that were not assigned previously as Desired for any agent.

Shifts in Undesired bids can be taken by agents who entered them as Desired bids. The worst case scenario occurs when an agent who has no assigned schedule finds all of his/her Desired bids granted to another agent with a higher rank who bid Desired on the same shifts, and all of his/her Undesired or neutral bids granted to other agents with a lower rank who bid Desired on those same shifts.

Configuring Bidding Scenarios

Begin at the Schedule Scenarios view.

1. Create a Forecast Scenario

1. Create a New Forecast Scenario.
2. Define the work week(s) that this forecast spans and the activities that it requires.
3. Build Volumes, Build Staffing, and then Publish the Forecast.
   This transfers the forecast to the master schedule database, so you can configure a bidding schedule.
4. Follow all the steps exactly as you would to create a non-bidding schedule.

2. Create a Schedule Scenario

1. Create a New Schedule Scenario.
2. Define the General Parameters including **Start Date**, **End Date** and Extended End Date.
   For example, you can build a 1-week bidding schedule the Start Date 3 June 2007, and the End Date 9 June 2007, and the Extended End Date is 1 September 2007. The one-week schedule that you present to agents for bidding, is applicable for the entire 3rd quarter of 2007. Agents can see the Extended End Date during bidding, and thus know that they are bidding on schedules for the entire 3rd quarter.
3. Select Activities, and Agent Profiles.
   You can select real agents too, but their schedules will not be biddable.
4. Build the scenario.

3. Configure the Scenario for Bidding

1. Build the **Bidding Schedule**.
2. Define *which* agents can bid in the Bidding Candidates Selection dialog.
3. Define *when* agents can bid in the Control Bidding Process Wizard.

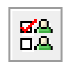
Select Bidding Candidates

Use the **Bidding Candidates Selection** dialog to specify which agents are eligible to bid on a chosen bidding scenario.

1. Preparation

a. Create and configure a Scenario for bidding.
b. Open the Scenario and select the **Profiles/Bidding** view.

2. Assigning the Agents

a. To open the wizard, click **Bidding Candidates Selection**  in the toolbar.
b. In the **Bidding Candidates Selection** dialog, open the **Site(s)** and then the **Team(s)**.
c. Select only the team members who will be eligible to bid on your configured **Scenario**.
d. Clear the check box to the left of each member who will not be eligible to bid.
e. Click **OK**.

Associate/Separate Teams

You reached this wizard by clicking **Associate/Separate Teams**  in the toolbar.

Follow these steps to associate or separate teams:

1. Select one of these two radio buttons:
   - **Associate Teams**—The teams that you select from the **Configured Team** and **Profile Team** drop-down menus will be associated with each other. Profile agents from the profile team will be placed on the configured team.
   - **Separate Into Teams**—Any profiles that are in the team that you select from the **Configured Team** drop-down menu will be separated to a profile team. The **Profile Team** drop-down menu will be disabled.
2. Select a site from the **Sites** drop-down menu.
   All sites that are present in the currently selected scenario are listed. Selecting a site refreshes the team lists in this dialog box.
3. Select a team from the **Configured Team** drop-down menu.
   All configured teams in the currently selected site are listed, with no default choice. *Configured* means teams created in the **Organization > Sites** module of WFM Web, with real agents assigned.
4. Select a team from the **Profile Team** drop-down menu.
   All profile teams that are in the currently selected site are listed, with no default choice. Disabled if the radio button **Separate into Teams** is selected.
5. Click **OK** to perform **Association** (or **Separation**).
   Click **Cancel** to abandon it.

Control Bidding Process Wizard

Use this wizard to:

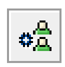
- Define the **Schedule Bidding** period (**Bidding Start date/time** and **Bidding End date/time**) for the current bidding scenario.
- End bidding early, or extend bidding, by changing the **Bidding End** value for a bidding scenario that is currently open.

1. Preparation

a. Create and configure a Scenario to be used for bidding.

b. Open the Scenario and select the **Profiles/Bidding** view for that scenario.

2. Running the Wizard

a. To start the wizard, click **Control Bidding Process**  in the toolbar.

b. In the **Select Site** dialog, select the appropriate site and click **Next**.

c. In the **Set Bidding Options** dialog, use these controls to specify the start and end of bidding:

Bidding Start	Specify the bidding start date and time. You can type directly into each text box, use the up or down arrow to modify the displayed date, or click the button at right to display a calendar. Default value: bidding start date (if bidding was already initiated) or midnight tomorrow (if bidding is not yet initiated).
Bidding End	Specify the bidding end date and time. You can type directly into each text box, use the up or down arrow to modify the displayed date, or click the button at right to display a calendar. Default value: bidding end date (if bidding was already initiated) or midnight tomorrow + 1 week (if bidding is not yet initiated).

You can change the **End Date** after the bidding scenario is already open and while agents are bidding. You might have to change the date, either to extend or to shorten the bidding period, for business reasons. But be careful if you do that.

The **End Date** is visible to agents as they bid, and they will rely on its accuracy. If you decide to close bidding early (or to extend it), inform all your agents beforehand so they will not be caught by surprise.

d. Click **Finish**.

Resolving and Publishing Bidding Scenarios

The **Schedule Bidding** period has ended. Eligible agents have bid on their preferred schedules and if each agent requested a different schedule, then the Supervisor could grant everyone's wish. But of course there are conflicts. The Supervisor must resolve identical bids and create a schedule with a real agent assigned to every schedule, while heeding such factors as agent seniority and rank.

Supervisors should follow these steps to resolve the bidding and publish a schedule with real agents:

1. Select the **Schedule** module, open the bidding scenario that needs resolution, and select the **Bidding/Profiles** view.
   If necessary, you can end bidding early for a still-open schedule.
2. Examine the agents' bids, and make manual adjustments or assignments as necessary.
3. Run the Auto-Assign Schedules Wizard, to assign real agents to the "profile" schedules automatically.
4. Publish the now-finished bidding schedule to the **Master Schedule**.

The **Publish to Master Schedule** page of the **Publishing Wizard** includes the Insert granted exception, time off, and day off Calendar items check box, which you can use to overlay these items in the schedule.

> **Important**
>
> Unassigned profile schedules are not published to the **Master Schedule**; only real agents' schedules.

After the bidding scenario is published to the **Master Schedule**, agents can view it when they log in.

The Supervisor can generate a Schedule Bidding Report if all profile schedules were assigned to real agents.

Auto-Assigning Schedules

You reached this view by clicking **Auto-Assign Schedules**  in the toolbar.

Follow these steps to auto-assign schedules:

1. Select a **site**.
2. Select a ranking system by clicking one of these three radio buttons:
   - **Seniority** favors agents by their hire dates.
   - **Rank** favors agents by their rank, as defined by a supervisor.
   - **Seniority + Rank** favors agents by seniority first, and if that results in a tie, then uses rank as the criterion.
3. Select a target (which agents will be assigned schedules).
   All Agents—Auto-assigns from the pool of all agents. Here are two uses for this option
   - You previously prepared profile schedules, not intended for bidding but for 400 new agents that you have now hired, and need to assign.
   - Bidding is resolved but you still need to assign a few profile schedules to real agents.

   Bidding Agents Only (default)—Auto-assigns only those agents that were designated as eligible to bid, in the Bidding Candidates Selection dialog.
4. Click **OK** to begin the auto-assignment process or **Cancel** to abandon it.

Schedule Build Wizard

Use the Schedule Build Wizard to build a schedule for a selected site, based on a selected forecast scenario. The build process includes all activities and agents defined for this site in the scenario.

Using the Schedule Build Wizard

To use the wizard:

1. Select an existing schedule scenario or use the New Schedule Scenario Wizard to create a new scenario.
2. Open one of the following Schedule Scenario views:
    - Scenario Intra-Day view
    - Scenario Agent-Extended view
    - Scenario Coverage view
    - Scenario Weekly view
    - Scenario Profiles/Bidding view
    - Scenario Summary view
    - State Group Totals view
3. In the **Actions** toolbar, click **Build Schedule** , or select **Build Schedule** from the **Actions** menu.
   The Select Sites screen opens.
4. Select the site(s) and build options that you want, and then click **Next**.
   The Schedule Build Parameters screen opens.
5. Select the specific parameters to apply for Team Synchronicity, Shared Transport Constraints, Preference Fulfillment Options, Optimizing Profiles, and Assigning Profiles to Teams.
6. Click **Finish**.
   The Building Schedule... dialog appears, showing the progress of schedule building.

Select Sites (and Build Options)

Use the Schedule Build Wizard's **Select Site** screen to select one or more sites, and specific schedule build options for each site.

This screen displays a table, with a separate row for each available site. Within each row are columns that contain build options.

- Choose all items in any column by selecting the check box at the top of the column. Clear the check box to reject all items.
- Choose any individual item in any row by selecting the check box in that row. Clear the check box to reject that item.

The columns contain the following build options.

Site

Each row contains a site that is in the currently selected schedule scenario. You must select at least one site.

If you do not see a site that you want to include, cancel and create a new schedule scenario that contains that site, and then use that site as the basis for your schedule build.

Force Single Skill

If you select this option and an agent has multiple skills, the agent can be scheduled for only one activity on each workday.

If you clear this option, the agent can be scheduled for multiple activities on the same day.

Use Required

If you select this option, the schedule is built with the Required Staffing forecast, not with the Calculated Staffing forecast.

Disable monthly constraints for the first month

Select this check box when the first month is not complete (because you are scheduling from the middle of the month) and there is no historical data for the beginning of the month. In this situation, schedule building cannot correctly accommodate monthly constraints, such as minimum or maximum work hours per month.

Select this check box to relax those constraints for this month.

Shuffle Agents

If you select this option, the agent pool is *randomized* before scheduling. (*Randomizing* ensures that the schedule's results are independent of the sequence in which agents are loaded into the scheduling algorithm.)

Use Team Constraints

Select this check box to enable team synchronicity constraints in the next wizard screen (**Specify Build Parameters**). Clear the check box to disable this functionality.

This option and the **Use Shared Transport Constraints** option cannot be selected simultaneously.

Use Shared Transport Constraints

Select this option to enable shared transport group constraints in the next (**Specify Build Parameters**) wizard screen. Clear the check box to disable this functionality.

This option and the **Use Team Constraints** option cannot be selected simultaneously.

> **Tip**
>
> Shared Transport is known by many different names worldwide—bus, carpool, ride share, lift share, and paratransit, for example. See Wikipedia for details.

Exclude Granted Agents from Used Constraints

If you select this option, agents who have been granted full-day exceptions or working hours are not considered when team synchronization is enforced.

> **Important**
>
> *Always* select this option when you are using team constraints.

Click **Next** to continue, or **Cancel** to discard your selections and close the wizard.

Use Secondary Activities

Check this option to assign a secondary activity to agents directly. Activity assignment is based on skills and skill levels, therefore a secondary activity is one, in which at least one of the agent's skills is marked as secondary. Leave this option unchecked if you want only primary activities considered in the Site schedule scenario.

Schedule Build Parameters

Use the Schedule Build Wizard's **Parameters** screen to select parameters for the selected sites from the previous screen. Each site is a node in a tree on the left-hand side of the screen. Click the node to open the tree and display that site's build parameters. Select a parameter in the tree (on the left,) and you can select, specify, or disable all of its options on the right side of the screen.

The parameter categories are:

- Team Synchronicity
- Shared Transport Constraints
- Preference Fulfillment Options
- Optimize Profiles
- Assign Profiles to Teams

Team Synchronicity

Specify these parameters:

Synchronize Days Off	Select this check box to specify that days off should be synchronized for all teams.
Synchronize By	Use the radio buttons to specify the synchronization combinations to apply when building the schedule: • **No additional synchronization** • **Shift Start Time**—If checked, use the duration control **Maximum Start Time Difference** to specify the maximum difference between shift start times inside the team. Use the format HH:MM; where 02:59 is two hours and fifty-nine minutes. • **Paid Duration** • **Shift Start Time and Paid Duration** • **Shift Start Time, Paid Duration, and Meals** • **Shift Start Time, Paid Duration, Meals and Breaks** • **Paid Duration and Meals** • **Paid Duration, Meals and Breaks**
Maximum Start Time Difference	Specify in hh:mm format. Range is from 0 (zero) to

	23:59.
Apply constraints only to the same contracts inside team	Select this check box to specify that while synchronizing teams, WFM must take configured contract information into account while creating the schedule. By default, this check box is cleared.

Tip

Synchronization applies to all teams under the selected site.

Shared Transport Constraints

Tip

Shared Transport is known by many different names worldwide—bus, carpool, ride share, lift share, and paratransit, for example. See Wikipedia for details.

If you selected **Shared Transport Constraints** in the Select Sites (and Build Options) dialog, this selection is enabled and **Team Synchronicity** is disabled (team and shared transport group restraints are mutually exclusive). Type, or use the spinner controls, to specify the maximum deviation between starts and ends of shifts. You can specify any value between 1 minute and 23 hours, 59 minutes; most practical values will be less than 30 minutes.

Important

The participants in a shared transport group can work in shifts that begin and end at different times; however, they should not deviate greatly, or the shared transport group becomes impractical. You are specifying the maximum allowable deviation in the schedule of each participant in the same shared transport group.

Preference Fulfillment Options

The **Force Maximum Preference Fulfillment** parameter optimizes the number of profiles for the selected site. See How the Preference Fulfillment Ratio Works for more information.

Select this parameter to:

- Treat all preferences with preferred status as granted.
- Resolve all granted and would-be granted preferences.

- Use the result to build the schedule.
- Disable all other options on the page.

Clear this parameter (default) to disable the options listed above, and enable the options listed below.

Prioritization	Specifies how WFM Builder favors agent requests when building the schedule. Select one item from the drop-down list: • **None** specifies no prioritization during schedule building. • **Seniority** favors agents by their hire dates (which are indicated in the table on the lower part of the **Preference Fulfillment** screen). • **Rank** favors agents by their rank, as defined by a supervisor in the Agent Properties (and also indicated in the table on the lower part of the **Preference Fulfillment** screen). • **Seniority + Rank** favors agents by Seniority first, and if that results in a tie, then uses Rank as the criterion.
Emphasis	Controls how closely the build process considers skill coverage when it assigns priorities to preferences. Select one item from the drop-down list: • **None** specifies that agents' preferences are assigned on the basis of seniority and/or rank alone, using the percentages assigned to the agents (as shown in the **%** column). This option tends to favor multi-skilled optimization over preference fulfillment. • **Low** specifies that schedule building places more emphasis on preference fulfillment, without sacrificing multiskilled optimization. • **Medium** specifies that schedule building accommodates preferences if a loss in any skill coverage is caused only by an exception. • **Strong** specifies that schedule building does not consider multiskilled optimization when it allocates preferences. Tip Emphasis is disabled when you select **Team Constraints** in the Select Sites (and Build Options) wizard page.
Fulfillment	Sets the minimum and maximum percentage of preferences that schedule building fulfills. For example, if you set **Min** to `10%` and **Max** to `80%`,

	every agent has at least 10% of his or her preferences fulfilled, while the highest-ranking or most senior agent has at least 80% of his or her preferences fulfilled. Agents with intermediate standing receive a percentage between the two extremes (their exact percentage depends on their place in the hierarchy). Enter or select the Min(imum) and Max(imum) values. The range is 0—100 and **Min.** must be lower than **Max.** Tip Schedule building applies these percentage values separately to each preference type and satisfies all preferences, when possible. For example, if an agent has a 50% fulfillment ratio, and makes 20 shift preferences and 8 day-off preferences over a 4-week period, the agent is guaranteed to receive at least 10 preferred shifts and 4 preferred days off, unless this preference fulfillment is prohibited by other working rules. In cases where the preference fulfillment ratio cannot be achieved due to working-rule violations, WFM Web displays a warning indicating that the schedule results may not be desirable. WFM Web attempts to satisfy more than the minimum level of preference fulfillment, as long as the results do not cause understaffing.
Calculate	Re-sorts the table below by the **%** column, which will then display each agent's calculated chance of preference fulfillment. (Use the table's vertical scroll bar to display more agents.) • Click **Calculate**.
Adjust Fulfillment Ratio	Adjusts the preference fulfillment ratio using the controls below the table. 1. In the **Adjust Fulfillment Ratio** text box, enter a value or use the up or down arrows to modify the displayed value. Range is -100 to +100. 2. Click **Adjust**. Tip In the **%** column, WFM Web adds your adjustment to, or subtracts it from, all agents' chances of preference fulfillment. However, it does not increase any agent's fulfillment ratio above 100% or reduce it below 0%.

How the Preference Fulfillment Ratio Works

The preference fulfillment ratio modifies the impact of the agent prioritization settings.

- The preference fulfillment functionality applies only to calendar items that an agent can request (Shift, Day Off, and Availability). Also these items may be inserted into the calendar by a supervisor. Any other preferred calendar items (such as Exceptions, Times Off, Working Hours) are not fulfilled; they remain in `Preferred` status even if 100% fulfillment is defined.
- If you set the ratio to a value greater than 0, then each agent's chances of having his or her preferences fulfilled is increased by whatever value you entered, up to the maximum percentage that you set for the **Max** option.

- If you set the ratio to a value less than 0, then every agent's preference fulfillment ratio is reduced by whatever value you entered, down to the minimum percentage that you set for the **Min** option.

> **Tip**
> The preference fulfillment ratio cannot surpass the **Min** and **Max** percentage values set under **Preference Fulfillment Options**. For example, if **Max** is set to 80%, and the preference fulfillment ratio is set to 100 (maximum preference fulfillment), all agents will top out at 80%. If **Max** is set to 80% and **Min** is set to 10%, and the preference fulfillment ratio is set to -30 (favoring optimization), then agents who would be at 80% are dropped to 50%; agents at 40% are dropped to 10%; and all agents with prioritizations lower than 40% also drop to 10%.

Optimize Profiles

The grid displays all profiles for the selected site. These are the profiles that are based on configured profiles, not profiles that are based on agents. The columns in this grid are:

Profile	Profile names.
Min	The minimum number of profiles that WFM can use when building the schedule. Range: Empty (default) or any number from 0 to 9999. This value is editable, and must be less than the value of **Max**.
Max	The maximum number of profiles that WFM can use when building the schedule. Range: Empty (default) or any number from 1 to 9999. This value is editable, and must be greater than the value of **Min**.
Existing	The number of actual profiles already present in the selected schedule scenario.
Growth Ratio	The current growth ratio value that WFM can use for a particular profile when building the schedule. Range: Empty (default) or any number from 1 to 9999. This value is editable.

To archive specific goals for profiles optimization, the following valid parameters must also be considered:

1. Profiles are excluded from optimization when none of the following are specified: minimum profiles, maximum profiles, or growth ratio. Profiles must be empty.
2. Profiles with a fixed number of agents must have the minimum profiles = maximum profiles, with both values greater than 0. They do not require optimization, growth ratio is not applicable, and growth ratio fields must be empty.
3. Profiles participate in optimization when both minimum and maximum values are specified by following these rules: minimum profiles must be > or = 0, maximum profiles must be > 0, and minimum profiles

must be < maximum profiles.

a. Growth ratio is specified—All profiles that participate in profile optimization must have a specified growth ratio > 0 (0 is not a valid value for growth ratio).

b. Growth ratio not specified—Must be empty for all profiles.

Important

- You cannot have profiles with growth ratio and without growth ratio in the same schedule. Growth ratio must be specified for all profiles being optimized (see 3a) or none (see 3b). The only exception is in line 1 (above), where profiles are excluded from optimization completely.
- If minimum profiles = 0, it does not mean that a value is not specified. 0 is a valid value for minimum profiles.

Controls

These controls appear at the bottom of the **Optimize Profiles** pane:

Total Growth Ratio	Total of all rows from the grid column **Growth Ratio (%)**. Not editable.
Show configured profiles check box	Check to limit filter the grid to show only profiles that have **Min** and **Max** parameters specified. Default: cleared
Show existing profiles check box	Check to limit filter the grid to show only profiles that are already present in the selected schedule scenario. Grid column **Existing** cannot contain 0 (zero). Default: cleared
Understaff threshold (%) field	Enter the understaff threshold that WFM must use when building the schedule. Range: 0 (no understaffing) to 100 (total understaffing). Default: 20.

Assign Profiles to Teams

- Select **Use Backfilling of Existing Teams** to enable this parameter.

- Enter a number in the **Team Size** field.

The schedule scenario that you are building contains profiles and not actual agents in the selected site. You can assign profiles to be used to backfill teams that require it.

The grid displays all non-profile teams in the selected scenario. For each team, you can select the profile should be used to backfill that team. The grid has these columns:

Team	The team name.
Profile	A drop-down list of possible profile choices: • **None** (default) • A list of profiles that corresponds the value of **Max** on the Optimize Profiles page.

Click **Finish** to apply your choices and begin the build.

Scenario Building Schedule Dialog

The Building Schedule dialog appears after you click **Finish** in the Schedule Scenario Build Wizard. This dialog displays the schedule building progress and basic information about the built schedule scenario.

The **Schedule Information** section contains information about the schedule, such as the sites that are included in this build, the number of days in the schedule scenario, the number of agents, and the schedule start date.

The **Build Progress** section contains status information, such as the start time, the elapsed time, and the **Current Status**, indicating how the build is proceeding. After the schedule is built, the **Current Status** changes to **Done** and you can review any messages that were generated during the schedule building process. The number of messages is displayed in the bottom section of the dialog. Other information in this section includes the number of iterations of the schedule, the minimum, maximum, and probable **Agent Count Range** used in this schedule build.

Clicking one of the three buttons in the **Building Schedule** dialog enables you to take the following actions:

- **Review Messages**—Opens the Review Messages dialog. Enabled only if schedule building caused messages to be generated.
- **Stop and Save**—Enabled only if **Optimize Profiles** is selected after the application builds the first valid schedule (see Schedule Build Parameters). The application sometimes continues to build additional schedules to create an optimal schedule. To speed up the schedule building process, you can interrupt this process and save the latest results. However, this can result in schedules that are less optimal.
- **Close**—Closes the **Building Schedule** dialog.

Intra-Day Schedule Rebuild Wizard

Use this wizard to rebuild an Intra-Day schedule for multiple days (selected dates or a date range) for a site, team, or an agent. While in a Schedule Scenario you can rebuild from any of the following views: Intra-Day, Weekly, Agent Extended, or Profiles/Bidding view.

While in a Master Schedule view, you can rebuild from any of the following views: Intra-Day, Weekly, or Agent Extended.

The rebuild process can include any activities and agents defined for this site/day in the selected scenario or Master Schedule.

Reasons for Using This Wizard

The goal of the WFM scheduling algorithm is to minimize the over and under-staffing of agents, against the forecasted staffing requirements. This is the outcome when a schedule is generated. However, several circumstances might cause the schedule to be suboptimal by the time a particular schedule day arrives. For example:

1. You might have reforecasted volumes and staffing for the day.
2. Agents might have called in sick or were given time off.
3. Existing agent schedules might have been manually adjusted.
4. Additional agents might have been added into the schedule.
5. Meetings or other types of exceptions might have been added to the schedule.

Because of this, you may wish to reoptimize the schedule day. It does not make sense to reoptimize days or hours that have already passed. You probably do not want to reoptimize the current hour, since any changes to meals, breaks, and/or work activities would be difficult to communicate to the affected agents. The Intra-day Rebuild wizard allows you to reoptimize specific types of schedule items for selected agents, based on a particular configured start time, which would normally be later than the current time when you invoke the reoptimization.

However, it is important to understand several facts about Intra-Day schedule Rebuild function and be aware of situations such as when a schedule might not be reoptimized or will be impacted by set of limitations.

In a regular schedule build or rebuild, the existing schedule is simply replaced with a new schedule generated. But, a rebuild Intra-Day schedule function works with schedules/shifts that were scheduled to agents by any previous action that tried to modify selected wizard parameters, but couldn't substitute a currently scheduled item with another one. Therefore, the rebuild Intra-Day schedule functionality has a set of limitations that we should consider while using it. For example, the following cannot change by re-optimization:

- Day-Off cannot become Workday
- Workday cannot become Day-Off

- The scheduled shift cannot be changed to a different shift. The start/end time of the same shift can be re-scheduled if the corresponding option was selected. But, the shift cannot be moved if the shift's configuration has a non-flexible window or scheduled activities' open hours prevent different hours.
- Schedule of the day cannot become invalid (paid time, shift start/end). In such cases, the original schedule remains.
- If a scheduled shift is no longer under the current agent's contract, such schedule cannot be Intra-Day re-scheduled.
- If a scheduled shift contains a meal or a break that is no longer assigned to that shift in the current configuration or does not contain a meal that is in the current configuration, it cannot be Intra-Day re-scheduled.
- If the scheduled break/meal duration is different from the current break configuration or the break/meal's paid/unpaid flag is different, the shift cannot be re-scheduled.
- If the agent does not have any schedule for the rescheduled date, then it will stay with no schedule.
- Nothing can be changed before the re-optimization start time.

To use the Intra-Day Schedule Rebuild Wizard:

1. Select a Schedule Scenario or Master Schedule view (Intra-Day, Weekly, or Agent Extended).
2. Click the **Rebuild intra-day schedule** button on the **Actions** toolbar.
3. Complete each screen as it appears, and then click **Next**, or click **Finish** if it is the final screen:
    - Select Site
    - Select Options
    - Shared Transport Constraints
    - Team Synchronicity
    - Select Agents
    - Select Activities

Tip

- The **Select Activities** screen may not appear, depending on your selections at the **Select Options** screen.
- You can always click **Cancel** to discard your selections and close the wizard without making any changes.

Site and Build Options

Use the Intra-Day Schedule Rebuild Wizard's **Select Sites** screen to select a site and schedule rebuild options.

This screen displays a table, with a separate row for each available site. Within each row are columns that contain build options.

- Choose all items in any column by selecting the check box at the top of the column. Clear the check box to reject all items.
- Choose any individual item in any row by selecting the check box in that row. Clear the check box to reject that item.

Changes to the Intra-day Schedule Rebuild Wizard

The Intra-day Schedule Rebuild Wizard also has the new **Use Shared Transport Constraints** option. This option has the same purpose and similar functionality as the **Shared Transport Constraints** option in the Schedule Build Wizard.

The columns contain the following build options.

Site

Each row contains a site that is in the currently selected schedule scenario. You must select at least one site.

If you do not see a site that you want to include, cancel and create a new schedule scenario that contains that site, and then use it as the basis for your schedule build.

Force Single Skill

If you select this option and an agent has multiple skills, the agent can be scheduled for only one activity on each workday.

If you clear this option, the agent can be scheduled for multiple activities on the same day.

Use Required

If you select this option, the schedule is built by using the Required Staffing forecast, and not the Calculated Staffing forecast.

Disable monthly constraints for the first month

Select this check box when the first month is not complete (because you are scheduling from the middle of the month) and there is no historical data for the beginning of the month. In this situation, schedule building cannot correctly accommodate monthly constraints, such as minimum or maximum work hours per month.

Select this check box to relax those constraints for this month.

Shuffle Agents

If you select this option, the agent pool is *randomized* before scheduling. (*Randomizing* ensures that the schedule's results are independent of the sequence in which agents are loaded into the scheduling algorithm.)

Use Team Constraints

If you select this option, the schedule start times are synchronized for agents in the same team, within the configured threshold.

If you select this option, the **Team Synchronicity** page will appear later in wizard, and there you can specify how daily schedules for agents in the same team should be synchronized.

Use Shared Transport Constraints

Select this option to enable shared transport group constraints when the schedule is rebuilt. The participants in a shared transport group can work in shifts that begin and end at different times; however, they should not deviate greatly, or the shared transport group will become impractical. You will specify the length of the deviation.

If you select this option, the Shared Transport Constraints wizard page will appear instead of the **Team Synchronicity** wizard page. There, you will specify the maximum allowable deviation in the schedule of each participant in the same shared transport group.

Tip

Shared Transport is known by many different names worldwide—bus, carpool, ride share, lift share, and paratransit, for example. See Wikipedia for details.

Exclude Granted Agents from Used Constraints

If you select this option, agents who have been granted full-day exceptions or working hours are not considered when team synchronization is enforced.

Important

Always select this option when you are using team constraints.

Click **Next** to continue or **Cancel** to discard your selections and close the wizard.

Use Secondary Activities

Check this option to assign a secondary activity to agents directly. Activity assignment is based on skills and skill levels, therefore a secondary activity is one in which at least one of the agent's skills is marked as secondary. Leave this option unchecked if you want only primary activities considered in the Site schedule scenario.

Select Options

Use the Intra-Day Schedule Rebuild Wizard's **Select Options** screen to select date(s), time, and rescheduling options.

1. In the calendars displayed for date(s) selection, enter or select the day(s) to be rebuilt in the schedule. The calendars allow you to select multiple date(s) or a date range. However, the selected date(s) or date range cannot be outside the scenario's date range and out of 2 weeks date range. The default value shown is the date selected in the view from which the Wizard was called.
2. In the **Start from** selector, enter or select the time in the scheduled day(s) to start rebuilding. The default value shown is the computer's current time rounded to the nearest timestep start plus one hour. Before selecting the time from which you want to rebuild, consider that you will need to notify the affected agents of these changes.
3. In the **Time Zone** selector, select the applicable time zone. The default is `Local`.
4. Select one item from the **Rescheduling Options** list of self-explanatory radio-button choices. Selecting the final option (**Reschedule breaks, meals, activities/activity sets/task sequences, shift start and/or end times may change**) will enable check boxes that control whether shift start time, shift end time, and paid duration are fixed (not changeable).

   ### Important

   The final check box **Paid duration is fixed** in this grouping applies to breaks and meals (shift items), which are defined as paid or non-paid. If paid duration is fixed, when WFM rebuilds, it cannot give an agent a shift with a different paid duration than the agent currently has assigned. Otherwise, if the agent has a flexible Contract, it could be possible for the agent to get assigned a shorter or longer shift than currently assigned. The agent could potentially be assigned different meals and breaks as well.

5. Keeping the **Auto-commit changes** check box default value (selected) instructs the schedule builder to commit all schedule changes. Otherwise, they will be put into the schedule in a pending mode.
6. Select the **Additionally filter agents by contract** check box if you want to select agents with contracts for the schedule rebuild. When selected, the wizard displays the contracts tree. Select the check box for each contract you want to filter and click **Next**. The agents are then filtered according to the contracts you selected. Select the check box for each agent to include in the schedule rebuild.
7. Click **Next** to continue, or **Cancel** to discard your selections and close the wizard.

For information about task sequences (which are included in the fourth and fifth rescheduling options), see Shift Task Sequences and the *Workforce Management Administrator's Guide*.

Shared Transport Constraints

> **Tip**
>
> Shared Transport is known by many different names worldwide—bus, carpool, ride share, lift share, and paratransit, for example. See Wikipedia for details.

The members of a shared transport group can work in shifts that begin and end at different times, but they should not deviate greatly or the shared transport group will become impractical. You are specifying the maximum allowable deviation in the schedule of each participant in the same shared transport group.

If you enable **Shared Transport Constraints**, this dialog box appears in place of the **Team Synchronicity** page (team restraints and shared transport group restraints are mutually exclusive). Type, or use the spinner controls, to specify the maximum allowable deviation between the start times and end times of shifts for the shared transport group members. You can specify any value between 1 minute and 23 hours, 59 minutes; most practical values will be less than 30 minutes.

Team Synchronicity

This screen appears only if you selected at least one site under the category **Use Team Constraints** on the first screen. Each site that you checked on that screen (**Select Sites**) appears in the leftmost column of a table. The others columns display certain settings for each site.

Specify the following parameters:

Synchronize Days Off	Select this check box to specify that days off should be synchronized for all teams.
Synchronize By	Each cell is a drop-down menu that you can use to specify the synchronization combinations to apply when you are building the schedule: • **No additional synchronization** • **Shift Start Time**—If this check box is checked, use the duration control **Maximum Start Time Difference** to specify the maximum difference between shift start times inside the team. Use the format HH:MM; where 02:59 is two hours and fifty-nine minutes. • **Paid Duration** • **Shift Start Time and Paid Duration** • **Shift Start Time, Paid Duration, and Meals** • **Shift Start Time, Paid Duration, Meals and Breaks** • **Paid Duration and Meals** • **Paid Duration, Meals and Breaks**
Maximum Start Time Difference	Each cell is a spinner box where you can specify this value in the hh:mm format. The range is from 0 (zero) to 23:59.
Apply constraints only to the same contracts inside team	Select this check box to specify that while synchronizing teams, WFM must take configured contract information into account while creating the schedule. By default, this check box is cleared. Tip This check box is enabled only when one of the options **Paid Duration**, **Paid Duration and Meals** or **Paid Duration, Meals and Breaks** is selected in the **Synchronize By** column. The check box is disabled, otherwise, because it does not apply when shifts are synchronized.

Click **Next** to continue, or **Cancel** to discard your selections and close the wizard.

Select Agents

Use the Intra-Day Schedule Rebuild Wizard's **Select Agents** screen to select one or more teams or agents within a team.

1. Under **Select Agents**, you can expand business units and sites to display agents. The tree shows only those agents who have the skills that are required for the scheduled activities.
   You can select individual agents from multiple teams, or you can select whole teams or the whole site.

   A highlighted background appears around the names of Agents whose schedule was edited in the selected date range after the last build or rebuild.
2. Select **Do not rebuild modified agent schedules** to exclude agents whose schedules have already been changed from the last time the schedule was built, re-built, or published.
3. Click **Next** (or **Finish** if that is offered instead).

Select Activities

The **Select Activities** screen appears if, on the Rescheduling Options screen, you select one of the following options:

- **Reschedule activities/activity sets/task sequences only**
- **Reschedule breaks, meals, activities/activity sets/task sequences, without affecting shift start/end times**
- **Reschedule breaks, meals, activities/activity sets/task sequences, shift start and/or end times may change**

To complete this screen:

1. Expand the object tree as needed.
2. Select one or more activities or multi-site activities.
3. Select **Retain scheduled activities** to have the build add any previously selected activities while keeping the activities that are currently in the Schedule.
4. Click **Finish**, or **Cancel** to discard your selections and close the wizard.

Schedule Rebuild Wizard

Use the Schedule Rebuild Wizard to change a built schedule's included agents, teams, and/or dates:

1. Click **Rebuild Schedule**  in the Schedule Scenario view's **Actions** toolbar or select **Rebuild Schedule** from the **Actions** menu.
   The first of the Schedule Rebuild Wizard's two screens, **Choose Start/End Date**, opens.
2. Enter the dates for which you want to rebuild the schedule.
   Neither date can be outside the scenario's original date range.
3. Click **Next**.
4. From the **Select Agents** window's list, select the agents you want to include in the modified schedule.
   You can expand business units to display their sites and you can expand sites to display their teams and agents. You can select any number of agents and/or teams within a single business unit.

   > **Tip**
   >
   > A highlighted background color indicates agents whose schedules were edited (for the selected date range) after the last build or rebuild.

5. If appropriate, select **Do not rebuild modified agent schedules**.
   Selecting this check box prevents the schedule builder from making further schedule changes for agents whose schedules were edited after the last build/rebuild.
6. Click **Finish** to rebuild the schedule with the new parameters.
   Or click **Previous** to review or change your Start/End Date selections, or **Cancel** to close the wizard without modifying the schedule.

Viewing Warnings after Schedule Rebuild

After rebuilding Intra-Day, Weekly, and Agent Extended Master Schedules is finished, you can view and save any warnings messages that were generated during the rebuild. WFM displays the number of warnings that occurred during Master Schedule rebuilds and saves them for further review.

Publishing/Extracting Schedules

Use the Publish Schedule Wizard to transfer unpublished schedule scenarios (or republish already-published schedule scenarios) to the Workforce Management database's Master Schedule, or to extract Master Schedule information to schedule scenarios.

The following sections cover:

- Publishing to the WFM Database.
- Extracting from the WFM Database.

Why Publish Schedules?

- Publishing represents the act of making a schedule scenario *official*. Only the Master Schedule is regarded as the official schedule.
- Until a schedule is published, you cannot calculate certain performance data or real-time agent adherence data.
- Until a schedule is published, agents cannot view it in the WFM Web for Agents client interface.

Publishing to the Master Schedule

Before launching the Publish Schedule Wizard:

- Assign real agents to your schedule scenario's profile slots. (Only real agents' schedules are published to the Master Schedule.)
- Commit all pending changes that you want to include in the Master Schedule. Uncommitted pending changes are disregarded when the scenario is published.

To publish a schedule:

1. In the Schedule Scenarios view's Scenarios Table, select the scenario that you want to publish. Then, click **Publish** on the **Actions** toolbar.
   The Publish Schedule Wizard's **Select Action** screen appears.
2. Select **Publish to Master Schedule**, and click **Next**.
   The **Publish to Master Schedule** screen appears.
3. In the **Publish Dates** section, select the **Start Date** and **End Date**.
   By default, the selected scenario's start and end dates appear in these fields.
4. If you want to repeat the schedule in the future, select **Publish to Date Range**, and then select the **Start Date** and **End Date** that you want. The **Publish to Date Range** feature enables you to publish the same schedule scenario for more than one schedule period. You can quickly publish schedules to fill

an extended time period. However, be aware that:

- If schedule length and the period selected to be published to the new date range do not match exactly, the Wizard copies as many days of the schedule as will fit into the new date-range period. For example, if the schedule is three weeks and the **Publish to Date Range** period is two weeks, the wizard copies only the first two weeks of the schedule. If the schedule is two weeks and the **Publish to Date Range** period is five weeks, the wizard copies the whole schedule twice in succession, and then copies the first week again to provide the fifth week of the new date range.
- All data within the schedule scenario is published to the new date range exactly. All schedule items, such as exceptions, breaks, meals, and time off, are also transferred.

5. From the **Agents** list, select which agents you want to publish to the target schedule.
   You can expand business units to display their sites and you can expand sites to display their agents. You can select any number of real (not profile) agents.
6. Optional: Select the **Insert granted exception, time off, and day off Calendar items** check box to overlay these items in the schedule when the scenario is published to the Master Schedule. Clear the check box to ignore these items.
   This option is useful when you want to use "fixed" agent schedules. You would create a 1-to-6 week schedule for one or more agents, and then use this feature to copy the schedule out into the future. When copying the schedule, WFM will account for granted Calendar items such as time off, exceptions, and days off. WFM may not be able to overlay all of the granted Calendar items because they may conflict with the items already in the schedule. In this case, you will receive a warning about the Calendar items which could not be scheduled.
7. Optional: Select the **Publish forecast scenario too** check box to publish the associated forecast scenario that you selected in the Schedule Scenarios view, for the selected dates for all activities in the scenario. If more control is needed over forecast-scenario publishing, it should be done from the forecast-scenario view instead. The default value is cleared (not selected), and this check box is absent if the schedule scenario is not associated with any forecast scenario.
8. Click **Finish**.

Baseline Master Schedule

After you publish a schedule scenario to the Master Schedule, WFM retains a snapshot of the Master Schedule at that point in time. This is called the baseline Master Schedule. Then, after you make changes to the Master Schedule, such as adding exceptions and granting vacations, you can compare the schedule coverage shown in the current Master Schedule against the schedule coverage stored in the baseline Master. The Schedule Summary Report and the Schedule Summary view present the comparison.

The Master Schedule baseline is created/updated each time something is published to the Master Schedule for a particular date range. Example: Assume on May 25, you publish the June schedule scenario to the Master Schedule. Assume on May 28, you republish the same June schedule scenario to the Master Schedule. On the Schedule Summary Report and in the Schedule Summary view, WFM uses the May 28 published schedule as the baseline against which the current schedule is compared.

Extracting a Schedule from the Workforce Management Database

To transfer data from the Master Schedule into a schedule scenario:

1. In the Schedule Scenarios view's Scenarios Table, select the scenario into which you want to extract the data. Then, click **Publish** on the **Actions** toolbar.
   The Publish Schedule Wizard's Select Action screen appears.
2. Select **Extract from Master Schedule**, and then click **Next**.
   The Extract from Master Schedule screen appears.
3. In the **Dates** section, select the **Start Date** and **End Date**.
   You must select dates within the target scenario's date range.
4. From the **Agents** list, select the agents whose schedules you want to extract to the target scenario.
   You can expand business units to display their sites and you can expand sites to display their agents. You can select any number of real (not profile) agents.
5. Click **Finish**.

Tip

Pending changes to the Master Schedule are not extracted to the schedule scenario.

Schedule Validation

Use the **Review Messages** window to manage warning and error messages that were generated the last time the schedule was built, validated, or rebuilt.

See a complete list of Error and Warning messages in the *Workforce Management Adminstrator's Guide*.

Using the Review Messages Window

The **Review Messages** window contains the following controls:

Reviewed	Select the check boxes in this column to indicate messages that you have reviewed.
Site	Displays the site name.
Message	Shows the text of each generated message.
Save *button*	Saves your reviewed selections.
Close *button*	Discards all changes and closes the window.

Trading

Use the Trading module to review, and accept or decline, agents’ proposed schedule trades. The features of this module are:

- A List of Trades.
- Ability to add Trading Comments.
- A Schedule Details window.

> **Important**
> If you do not see Trading information, or cannot configure objects or change settings in Web for Supervisors, you might not have the appropriate role privileges. See Trading Role Privileges in this Help. Also, you must configure WFM Web to initiate trading for agents. See the *Workforce Management Configuration Options Reference*.

Using the List of Trades View

The List of Trades view displays a week's schedule trading information for a single site at a time. Controls enable you to view details about each trade, to accept or decline the trade, and to enter comments about your decision.

Trade proposals appear in the List of Trades view if they meet the following criteria:

- The trade has not been automatically approved. Automatic approval is based on WFM's built-in trade rules or on exception types' own configured trade rules.
- The trade has not been automatically cancelled. WFM automatically cancels a proposed trade if either agent's schedule has been modified in some way in the Master Schedule since the trade request was made. For example, a supervisor has explicitly modified the agent schedule; or another trade, with overlapping schedule data, has been approved and executed.
- The trade has not been automatically declined. WFM automatically declines a proposed trade if either agent's schedule overlaps with overnight schedule from the previous day for a recipient agent.
- The trade has not yet been explicitly approved or declined by any supervisor. (Once acted upon, trades no longer appear.)

If a trade proposal has not been approved or declined by its effective date, the proposal expires and the trade does not occur.

How Trading Works

The topics on this page describe how a schedule trade proceeds to approval or rejection.

> **Tip**
>
> If you do not see Trading information in Web for Supervisors, you might not have the appropriate role privileges. See Trading Role Privileges in this Help. Also, you must configure WFM Web to initiate trading for agents. See the *Workforce Management Configuration Options Reference*.

Trading Summarized

A trade can include up to six full weeks of schedule days. Every schedule trade requires:

- One agent's proposal for a trade. The proposal specifies which schedule days this agent wants to trade.
- Another agent's response to that proposal. The response indicates this agent's willingness to accept the proposed trade.
- An approval, either automatically by WFM or explicitly by a supervisor.

For some trades, the proposing agent must explicitly accept the response before submitting the trade for approval. This is always true for community proposals, which are offered to all agents within a team, site, or business unit (if multi-site trading is permitted).

If a trade is approved, WFM executes it and both agents' schedules are changed to reflect it. After execution, WFM removes the trade from the **Trading** > **List of trades** view and you will see it only in the Schedule Trade report.

Not all trades are approved. For example:

- Under certain conditions (when one agent is not qualified for the other agent's scheduled activities), WFM automatically declines a trade.
- If either agent's schedule is changed before a pending trade's approval, the trade is automatically canceled.
- A supervisor may explicitly decline a trade.
- If a pending trade has not been approved before the first day involved in the trade, it expires.

In each of these cases, the trade does not occur.

Requirements for a Successful Trade

For a trade to take place, all of the following steps must occur. (See the *Workforce Management Web for Agents Help* for details about how agents perform the first three steps.)

- One agent creates a community or personal trade proposal.
- At least one agent responds to the community proposal, or the receiving agent accepts the personal proposal.
- The proposing agent accepts a response to a community or personal proposal. (This step is required for personal proposals only if the proposing agent specified manual approval.)
- The trade receives either WFM's automatic approval or a supervisor's explicit approval.

> **Tip**
> At any time before approval, a pending trade can fail in one of three ways: either agent can cancel it; the trade can automatically be canceled if either agent's schedule is changed; or the trade can expire.

How Trades are Tested for Automatic Approval

Once both agents have accepted a trade proposal, WFM tests it for automatic approval. These tests evaluate the trade using the conditions listed in each of the following sections:

Exceptions' Trade Conditions

If either agent has a scheduled exception on any of the days to be traded, WFM tests the trade against the trade rules configured for that exception type. For example, exceptions that count as vacation time always have either the **Delete**, **Keep with agent**, or **Do not trade** rule.

Here is how WFM acts on each trade rule:

Exception Trade Rule:	How WFM Responds:
Delete	Allows the trade to proceed to the next test, but deletes the exception from the schedule.
Do not trade	Agent is not allowed to create trading proposal on day with scheduled exception "Do not trade".
Keep with agent	Allows the trade to proceed to the next test, but keeps the scheduled exception with the original agent.
Keep with schedule	Allows the trade to proceed to the next test, and trades the exception along with the schedule.

Auto-Decline Conditions

WFM automatically declines a trade if either agent's schedule overlaps with the overnight schedule from the previous day for a recipient agent.

If multi-site trading is permitted, WFM automatically declines a trade if:

- A scheduled shift cannot be matched with a shift on another site
- A scheduled exception type is not available on another site
- A scheduled marked time is not available on another site
- A scheduled time-off item is not available on another site

Supervisor Approval Conditions

WFM places a trade "in review"—a status that requires a supervisor to approve the trade—if the trade involves any of the following conditions:

- The traded schedules have different paid hours.
- Either agent is trading days off for working days.
- Either agent has a scheduled exception with the delete rule enabled.
- Either agent is trading a keep with agent exception for fixed-staff work.
- The trade violates an agent's availability (contract availability, granted availability preferences, or rotating availability).
- The trade violates certain contract terms or site rules: minimum or maximum working hours per day or per week; minimum or maximum days off per week; or minimum time off between consecutive working days.

Auto-Approval Conditions

If a schedule trade does not match any of the Auto-Decline or Supervisor Approval conditions, WFM automatically approves it and trades the schedules.

Auto-Cancel Conditions

WFM automatically cancels a trade proposal, a response, or a pending trade in review if either agent's schedule is modified in the Master Schedule. Examples of auto-cancel conditions are:

- A supervisor explicitly modifies either agent's schedule.
- Another trade is approved and executed for either agent that involves a schedule period that overlaps with the schedule period for this trade.

Expiration Conditions

If a trade has not received approval by the day before its first included day, it expires, and can no longer be approved by any agent or supervisor.

List of Trades View

Use the List of Trades view to review and manage agents' pending schedule trades. The view displays a table of agents' proposed schedule trades, standard date-selection controls, buttons to accept or decline each pending trade, and a drop-down list that modifies the table's contents.

Multi-Site Trading

If multi-site trading is permitted in your environment, it enables agents to trade across different sites within the same business unit. This means you might see the same trade under two different sites, if the trade participants are located in different sites.

Depending on which sites you have access rights to, you can either fully approve the trade or partially approve it (if you have access rights to only one of the two sites in the trade). When you partially approve a trade, you receive an appropriate warning message (that the trade needs further approval) and the trade remains in **Pending** status until a supervisor with the required site access rights completes the trade approval process.

Displaying the List of Trades

To display the List of Trades view:

1. In the Modules tree, click **Trading** > **List of Trades**.
   The List of Trades view appears.
2. In the Objects tree, select a site, teams, and/or agents.
   You can expand business units to display their sites and you can expand sites to display their teams and agents. You can select any number of agents and/or teams within a single site.
   Trades can occur only between agents in the same site. If you select a new site or its teams/agents, this clears any previous selection that you made within a different site.
3. Click **Get data** to populate the table for the selected agents.

Using the Table

The **List of Trades** table shows all of the proposed schedule trades that meet the following criteria:

- At least one trade participant is among the agents that you selected in the Objects tree.
- The trade can still be accepted or declined. (Once accepted or declined, trades no longer appear in the table.)
- The trade is within the selected week. (To see other weeks, use the date-selection controls at the upper right.)

Each proposed trade appears on two rows. (If a scroll bar appears to the right, you can use it to reveal more trades.) The table includes the following columns:

Dates	Start and end dates for the proposed trade.
Agent Name	Names of both agents involved in the trade.
[Weekdays]	Agent schedule information for the specific day in the trade. The cell contents correspond to your selection from the Show data for drop-down list. If the agent is not scheduled for a shift on this day, the cell contains: **Day Off**, **Vacation**, **Working Hours** (for scheduled working hours without a shift), or an exception name (for scheduled full-day exceptions). A blank cell indicates that this day is not included in the proposed schedule trade.
Paid Hours	Total paid hours in the trade proposal.
Details	Button to display schedule details for both agents involved in the trade.

Accepting or Declining Trades

To accept or decline proposed trades:

1. Select one or more trades in the table to select them.
2. Select one of the following options from the view's right side (or on the **Actions** menu):
   - **Accept**—Opens the Comments window for you to add an (optional) comment and approve the selected trade(s)
   - **Decline**—Opens the Comments window for you to add a (required) comment and reject the selected trade(s).

Show Data for

From this drop-down list, you can select what you want to display inside each day's table cell:

Total Paid Hours	Total paid hours for each day.
Working Start/End Time	Start and end times of agents' work. (Default display option.)
Shift or Schedule State Names	Names of agents' assigned shifts for each day.

Trading Comments Dialog

Use the **Trading Comments** dialog box to confirm your acceptance or rejection of a proposed schedule trade, and to add a comment about your decision:

1. Type your comment into the **Comments** text box.
   A comment is required when you decline a trade, but it is optional when you accept a trade.
2. Do one of the following:
   - Click **OK** to attach your comment and confirm the trade's acceptance or rejection.
   - Click **Cancel** to discard your comment and take no action on the proposed trade.

Clicking either button closes the window and returns you to the List of Trades view.

Schedule Details Dialog

Use the **Schedule Details** dialog box to view schedule information for both of the agents in a proposed schedule trade.

Each column displays one agent's information, in the following rows:

Agent	The agent's name.
Date	The date for which details are displayed.
Paid Hrs	The agent's total paid hours for the scheduled states/activities.
Schedule Details	The states or activities for which the agent is scheduled.
Sch. Attendance: Start Time	The agent's scheduled start time for these states/activities.
Sch. Attendance: End Time	The agent's scheduled end time for these states/activities.

Performance

Use the Performance module to display performance statistics for business units, sites, and activities. This module includes a Monitor view for the most recently completed timestep, an Intra-day table view, and an Alerts view.

Also, use the What-If Window to analyze how changes to some statistics affect other factors.

All views display the following statistics, which are calculated by the WFM servers:

Interaction Volume	Forecast and Actual number of interactions.
AHT (Average handling Time)	Forecasted, Actual, Difference, and Difference % in the average handling time, in seconds.
Abandoned Interactions (%)	Scheduled, Calculated, Required, and Actual percentage of abandoned calls.
Service Level (%)	Scheduled, Calculated, Required, and Actual service level percentage.
Deferred Service Level (%)	Scheduled, Calculated, Required, and Actual deferred service level percentage.
Actual Queue	The actual number of interactions in the backlog queue at the end of the period.
ASA (Average Speed of Answer)	Scheduled, Calculated, Required, and Actual average speed of answer, in seconds.
Coverage	Number of agents scheduled for each activity. If an agent works only part of a time interval, only the portion during which the agent works (rounded to the nearest minute) is counted toward scheduled staffing. As a result, these values may be fractions or decimals. This column is now under Staffing in the grid.
Staffing	Number of agents Calculated and Required for each activity, and the difference between Coverage and Calculated and Coverage and Required staffing. The Required and Calculated values are taken from the forecast and are always whole numbers, but the Diff. Calc. and Diff. Req. values can be fractional.
Variance	Scheduled and Required variance. Optimal staffing value for the timestep minus the scheduled number of agents (Sch.), and the optimal staffing value for the timestep minus the required number of agents (Req.). Tip *Optimal staffing* is a calculation based on actual interaction volume, actual AHT, and the service objectives specified in the forecast. This value is not displayed on its own, but is used in calculating

	Variance values.
Headcount	Scheduled and Actual headcount. Number of scheduled (Sch.) and actually working (Act.) agents. For more information, see description of Headcount in the Master Schedule Summary view.

These statistics are presented for a 24-hour range, with 12 hours before, and 12 hours after, the current timestep. The displayed data is automatically refreshed at least once per minute.

For timesteps in the future, the displayed "actual" values are those that WFM Web anticipates by comparing past data with the planned forecast. These anticipated values do not affect the schedule, and they are not saved.

The anticipated values can help you make real-time changes to your site setup. For example, unneeded agents can be sent home if you are overstaffed, or extra agents can be called in if you are understaffed. You cannot change the schedule from the Performance views; use the Master Schedule Intra-Day view to do so.

Tip

For timesteps that have an interaction volume of zero, you can display service-level data as either 0% or 100%. This is determined in Configuration Server by the WFM Server application’s **Options** tab > **PerformanceService** section > **NoCallsServiceLevel** key, whose value can be set to either `0` or `100`. The default value is `0`.

Performance Monitor View

Use the Monitor view to view a horizontal bar graph for each performance statistic, based on the most recent timestep. See descriptions of the buttons shown in the toolbar image below.

Displaying the Monitor View

1. In the Modules tree, select **Performance** > **Monitor**.
   The Monitor view appears. If you switched to this view from another Performance view, it retains your earlier objects selection and shows graphs for the most recent timestep.
2. Select the enterprise, a business unit, site, or activity in the Objects tree.
   In the tree, you can expand business units to show their sites and expand sites to show their activities. If you make a new selection, the graphs refresh to match it.

Using the Monitor View

The Monitor view shows as many graphs as can fit on the screen at once. Use the scroll bar to the right to reveal graphs for additional statistics.

Each graph shows actual data, and either forecasted data or scheduled and required data. The displayed data is automatically refreshed at the conclusion of each 15-minute timestep, and represents the values from the most recent timestep.

The Legend (at the bottom) shows which color bar indicates which data category. Next to each data bar, a label lists the numerical value shown on the graph, with the following prefixes:

- A for actual data
- F for forecasted
- S for scheduled
- R for required

> **Tip**
> Scheduled metrics such as scheduled Average Speed of Answer (sec), Scheduled Service Level Percentage, and so on, describe what objectives you should meet based on the number of agents scheduled.

If alerts were configured for a statistic and that statistic exceeds the alert's configured deviation level, a red ALERT comment appears near the graph.

Required Data Options

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu):

Icon	Name	Description
	**Show Required**	Turns on and off the display of "Required" data in some statistics' graphs. (This option is a toggle: A darker button color, or a check mark beside the **Actions** menu option, indicates that it is selected. Click the same option again to deselect it.)
	**Use Multi-site Activities**	This button becomes enabled when you select a multi-site activity or business unit in the Objects tree. Clicking this button displays data for the selected multi-site activity. If you set this button to On, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Performance Intra-Day View

Use the Intra-Day view to display performance statistics (both summarized and detailed) in a grid. See the descriptions of buttons shown in the toolbar image below.

Displaying the Intra-Day View

1. In the Modules tree, select **Performance** > **Intra-Day**.
   The Intra-Day view appears. If you switched to this view from another Performance view, it retains your earlier Objects tree selection and shows the corresponding statistics.
2. Select the enterprise, a business unit, a multi-site activity, an activity group, a site, or an activity in the Objects tree.
   In the tree, you can expand business units to show their sites and activity groups and multi-site activities, and expand sites to show their activities. If you made a new selection in the Objects tree, the grid is updated to match it.

Setting the Time Zone, Granularity, and Date

Use the Time Zone, Granularity and Date controls (near the top) to customize the graph:

- Use the **Time Zone** drop-down list to choose the time zone to display in the graph and grid.
- Use the date-selection controls to choose the date to display in the graph and grid.
- Use the **Granularity** drop-down list to select the time interval for the graph's horizontal axis, and also for timesteps in the table below the graph: **60 min** (minutes), **30 min**, or **15 min**.

Reading and Configuring the Graph

By default, you see a graph for the Interaction Volume (IV) statistic.

- To switch the graph view to match a different statistic, select the statistic from the **Show Data for:** drop-down list above the graph. The choices in the drop-down list reflect the columns displayed in the grid below the graph.
- Select the **Show Required** check box to toggle on and off the display of required data in the graph.

The graph shows times on the horizontal axis, and values on the vertical axis. The Legend (below the graph) indicates which color is used for which data category.

Reading and Navigating the Grid

For each statistic, the grid displays actual values compared to forecasted, or scheduled and required, values. The displayed data is automatically refreshed at the conclusion of each 15-minute timestep, and represents the values from the most recent timestep. The grid's rows show timesteps, and its columns show statistic categories. The current timestep is identified by a yellow background.

By default, the grid shows a rolling view, which displays 12 hours before, and 12 hours after, the current timestep. You can choose instead to have the grid show the Whole Day view, which shows all of the timesteps, from midnight to midnight, of the current day.

- To use the current-day view, select **Show Whole Day** from the **Actions** menu.

> Tip
>
> When WFM is unable to calculate a value for a particular timestep, or if no value has yet been entered for it in forecast views, the cell is empty (blank).

Grid Rows

The grid contains the following rows, which are labeled in the **Time Step** column:

First row (--)	The first row displays summary (aggregate total or average) values for each statistic, calculated from the grid's first displayed timestep until the current timestep.
Timestep rows (numbered)	The remaining rows show 15-, 30-, or 60-minute timesteps. There are 24 hours' worth of data, which may be shown as including 12 hours before, and 12 hours after, the current timestep (rolling view) or from midnight to midnight of the current day (Current Day view). The rolling view is the default view. Use the scroll bar to the right to reveal more timesteps. A yellow bar indicates the current timestep.

Grid Columns

The grid's remaining columns show the following statistics and subcategories (these statistics are present in all views, and are described in the Performance overview):

- Interaction Volume

- AHT
- Abandoned Interactions
- Service Level
- Deferred Service Level
- Actual Queue
- ASA
- Staffing
- Variance
- Headcount

Anticipated Values

For Interaction Volume and AHT, future "actual" timestep values are calculated based on the ratio of previous actual/forecast values from moment to moment. For the other columns, values for future timesteps are forecasted based on anticipated IV and AHT. Actual values replace these anticipated values as the displayed data is refreshed.

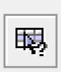
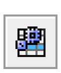
Display, Copy/Paste, and Other Options

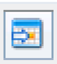
The Intra-Day view provides the following options:

- You can resize the grid columns to better view their contents.
- You can copy data from the grid to the clipboard and then paste it into another application.
  1. Click, or use the Tab or arrow keys, to move the selection box to one or more table cells.
  2. Select **Edit** > **copy**, or use your operating system's "copy" keyboard shortcut (such as Ctrl+C or Command+C).

Toolbar and Actions Menu

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu):

Icon	Name	Description
	**What If**	Opens the What If window for calculating "what if" scenarios based on the selected timestep's data.
	**Use Multi-site Activities**	By default, this button is enabled when you select a multi-site activity or business unit in the Objects tree. If you set this button to On, WFM retains your

Icon	Name	Description
		last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.
	**Show Whole Day**	Click this button to toggle between a rolling view (12 hours before and 12 hours after the current timestep) to a current-day view (from midnight to midnight of the current day).
	**Total Forecasted Values for Whole Day**	When selected, calculates totals across the grid's top row using actual performance data (displayed above the horizontal yellow line that indicates the current time slot) and forecast data (displayed below the line). When not selected, calculates totals across the grid's top row using actual performance data only. Tip This option affects only how the totals row is calculated, using the currently displayed data.
	**Move to Current Day**	Click this button to display data for today.
	**Options**	Displays the Performance Options dialog with a list of statistics that can be displayed in the grid.

Performance Alerts View

Use the Performance Alerts view to configure visual alert notifications for unacceptable performance.

The Alerts function uses Master Forecast and schedule data as a baseline for acceptable performance results.

If user-defined performance limits are violated (for example, if too many interactions are being abandoned, or if service levels fall too low), an Alert warning in the Monitor view notifies site managers that action may be necessary.

To configure alerts:

1. In the Modules tree, select **Performance** > **Alerts**.
   The Alerts view appears. If you switched to this view from another Performance view, it retains your earlier Objects tree selection. At right, the **Deviation** table is refreshed with any alert settings that have already been configured for this selection.
2. To set an alert on a different business unit, site, or activity, select it in the Objects tree.
   You can expand business units to show their activity groups and sites and expand sites to show their activities. If you made a new selection, the **Deviation** table is updated to match it.
3. In the **Deviation** table, select the **Alerts** check box beside each statistic name for which you want an alert. Clear the check box for statistics that should not have alerts.
4. Set the Minimum (%) and Maximum (%) allowable deviation for each statistic whose check box you selected.
   Set these limits by clicking and typing in the appropriate columns. These limits define the variance beyond which an alert is displayed. For example, assume that you set 3.0 as the Minimum (%) deviation level for Average Handling Time, and 5.0 (%) as the Maximum (%). In this case, an alert appears when the AHT goes more than 3 percent under, or 5 percent over, the number set in the forecast.
5. Click **Apply**. (Or, to discard your changes, click **Cancel**.)
6. If desired, configure alerts for other Business Units, activity groups, sites, or activities.
   You can repeat Steps 2-5 for as many Objects tree selections as you like. If you make a new selection without first clicking **Apply**, a dialog box prompts you to save your changes (**Yes**), discard them (**No**), or keep working with the same selection (**Cancel**).
7. To exit the Alerts view, select a different view from the Objects tree.

Performance Options Dialog Box

Selecting the **Options** button in the Performance Intra-Day view opens the **Options** dialog box, which contains a directory-style tree of statistics that can be displayed in the grid. By default all are selected. To clear or select any individual statistic, click its check box. There is a check box at the top of the tree that selects or clears all statistics at once.

Click **OK** to accept your changes or **Cancel** to abandon them.

For a list of statistics and their descriptions, see Performance.

What-If Window

Use the What-If window to immediately analyze how changes in some statistics would affect other factors.

To open the What-If window:

1. Select an activity in the **Performance Intra-Day** module.
2. Select a timestep in the data grid.
3. Click the **What if** button on the **Actions** toolbar.

Once the window is open, you can change certain values shown in the window to perform what-if calculations.

Statistics presented in the **What-If** window are as follows (these statistics are present in all views, and are fully described in the Performance overview):

- Interaction Volume
- AHT
- Abandoned Interactions
- Service Level
- Deferred Service Level
- Actual Queue
- ASA
- Coverage
- Required Staffing
- Variance
- Headcount

Interaction volume	Initial value is the forecasted interaction volume taken from Master Forecast. Enter a value greater than zero.
AHT (Average Handle Time)	Initial value is the forecasted AHT taken from Master Forecast. Enter a value greater than zero.
Abandoned Interactions (percentage)	Initial value is the scheduled abandoned calls percentage. Enter a value greater than 0 and less than 100. If you do not enter a value, the abandoned calls percentage is not included in the what-if calculation.
Service level (percentage)	Initial value is the scheduled service level percentage. Enter a value greater than 0 and less than 100. If you do not enter a value, service level

	is not included in the what-if calculation.
ASA (Average Speed of Answer)	Initial value is the scheduled average speed of answer. Enter a value greater than zero. If you do not enter a value, ASA is not included in the what-if calculation.
Coverage (formerly Scheduled Staffing)	Initial value is the scheduled coverage. Enter a value greater than zero.
Service time (sec)	Taken from Master Forecast. Configured in Staffing Build Wizard.
Average time to abandon (sec)	Taken from Master Forecast. Configured in Staffing Build Wizard.
Indirectly Occupied Time (%)	Taken from Master Forecast. Configured in Staffing Build Wizard.
Maximum Occupancy (%)	Taken from Master Forecast. Configured in Staffing Build Wizard.

The window also shows the following parameters from your forecast, if a forecast has been built (otherwise, these indicators are empty):

- Service time
- Average time to abandon
- Indirectly occupied time
- Maximum occupancy

To calculate what-if scenarios, you must have the following:

- Published forecast values for interaction volume and AHT (which initialize the window's first two fields), abandonment, service level, ASA, indirectly occupied time, and maximum occupancy.
- A published schedule that allows staffing suitability calculations. (This initializes the window's Coverage field.)

Calculating What-If Scenarios

You can calculate what-if scenarios for the group of service-level statistics (Abandoned calls, Service level, and Average speed of answer), or for the coverage level.

Calculating Abandoned Calls, Service Level, and Average Speed of Answer

1. Enter values into the **Interaction volume** and **AHT** text boxes.
2. Enter values into the **Coverage** text box.
   For successful calculations, enter values in all of these text boxes.
3. Click the **Calculate** button next to the **Service level** text box.

The window shows the expected impact of your changes on the Abandoned calls, Service level, and ASA. If a box is empty, there is no data for the appropriate statistic for that timestep.

Calculating Coverage Scenarios

1. Enter values into the **Interaction volume** and/or **AHT** text boxes.
2. Enter values into the **Abandoned calls**, **Service level**, and/or **ASA** text boxes. For successful calculations, enter a value in at least one of these text boxes.
3. Click the **Calculate** button next to the **Coverage** text box.

The window shows the expected impact of your changes on the Coverage.

Closing the What-If Window

When you have completed your calculations, click **Close**.

Adherence

Use the **Adherence** module to monitor real-time agent adherence to the schedule. You can display adherence data in the Details View (table) or the Graphical View (pie chart).

Each view refreshes its data at the time interval that is specified in WFM Web Application object's **Options** tab > **Adherence** section > **RefreshTime** option. The minimum refresh interval that you can configure is one second. Genesys recommends that you set the refresh interval to the minimum acceptable time, such as 20 seconds, as a shorter refresh time will affect overall system performance.

Agent information is updated automatically when the data in Configuration Server changes.

To force a display of updated information in either view:

- Click **Refresh**.

Adherence in Multi-Channel Sites

WFM determines if agents are adherent by comparing their channel real-time state, plus the reason codes, with the scheduled states for that same channel during each specified time interval. If at least one scheduled state for that channel can be mapped to the channel real-time state, according to its adherence rules, the agent is considered adherent.

Head Count for Activities in Multi-Channel Sites

WFM calculates the agent head count for activities in this way: If the activity belongs to a channel-related schedule state group, the agent is counted for the activity only if he/she is compliant with the adherence rules for that channel. Also, if an agent is non-adherent overall, but adherent for a channel, the agent is added to the head count for the activities for that channel.

Exporting Adherence Data

To export adherence data to a report or in CSV-friendly format, see the Adherence Reports.

Adherence Calculations

WFM can track single-channel agent adherence or agent adherence across multiple channels simultaneously. In sites where schedule state groups are configured for multiple channels, WFM determines if agents are adherent, by comparing their channel real-time state, plus the reason codes, with the scheduled states for that same channel during each specified time interval. If at least one scheduled state for that channel can be mapped to the channel real-time state, according to its adherence rules, the agent is considered adherent.

Calculation of Single-Channel Adherence

Agent adherence (single channel) is calculated as follows:

1. WFM maps the agent's real-time state plus the reason code. If there is more than one reason code, there is more than one state + reason code mapping. If there is no reason code, WFM uses only the state for mapping. For example, if the agent has real-time state `WaitingForNextCall` with reason codes `r1` and `r2`, for adherence purposes, WFM maps `WaitingForNextCall` + `r1` and `WaitingForNextCall` + `r2`.

2. WFM then finds all schedule state groups that are adherent to at least one agent real-time state from step 1. A list of schedule state groups is compiled that maps to the state, based on the configuration of the schedule state groups.

3. WFM obtains all scheduled states from the current agent schedule and maps them to the schedule state groups.

4. WFM collects all schedule state groups from step 3.
5. WFM intersects the sets of schedule state groups from step 2 and step 4. If the intersection is not empty, the agent is adherent.

Calculation of Multi-Channel Adherence

Multi-channel agent adherence is calculated as follows:

1. Similar to step 1 in Calculation of Single-Channel Adherence, WFM maps the agent real-time state + reason code. However, in addition to the aggregated agent state, WFM also adds separate real-time states for each channel configured on the site. (Agents can sometimes have no state on certain channels.) If reason codes are used, WFM could map multiple state + reason code pairs for each channel, plus the aggregated state.

2. Similar to step 2 in Calculation of Single-Channel Adherence, WFM maps schedule state groups adherent to the aggregated state. However, in addition, WFM finds a separate set of schedule state groups for each channel. WFM considers only the schedule state groups that are specifically assigned to a particular channel for adherence with the states on that channel. WFM considers the schedule state

groups without a channel for adherence with the aggregated agent state.

3. WFM obtains all scheduled states from the current agent schedule and maps them to the schedule state groups.
4. WFM collects all schedule state groups from step 3.
5. WFM Intersects the sets of schedule state groups from step 2 and step 4 separately for each channel. If both sets are empty or the intersection is not empty, WFM considers the agent is adherent to the channel. For the aggregated agent status, WFM assumes adherence, when either the pair in step 4 is empty or step 2 and step 4 intersect. WFM considers the agent adherent, if he/she is adherent on all channels and adherent to the aggregated status.

The multi-channel algorithm also comes to a boolean conclusion; that is, the agent is either adherent or non-adherent. However, to be adherent the agent must be adherent on every channel, on which he/she is scheduled or, for which he/she receives a real-time state. Also, if the agent is scheduled on non-channel-related states, he/she must also be adherent to those states. See the example in Use Case: Multi-Channel Adherence.

Use Case: Multi-Channel Adherence

This use case is based on the schedule state group configuration in Use Case: Multi-Channel Adherence Tracking.

Summary	Real-time states	Scheduled states	Adherence
Agent is working on voice only, but scheduled for email and voice.	Agent state: `CallInbound` DN email: `NotReady` DN 2323: `CallInbound`	E-mail activity, voice activity	Not adherent
Agent is working on email and voice, but scheduled for email only.	Agent state: `CallInbound` DN email: `WaitForNextCall` DN 2323: `CallInbound`	E-mail activity	Not adherent
Agent is on a break.	Agent state: `NotReady` DN email: `NotReady` DN 2323: `NotReady`	Break	Adherent

Calculation of Agent Head Count

WFM calculates the agent head count for activities in this way: If the activity belongs to a channel-related schedule state group, the agent is counted for the activity only if he/she is compliant with the adherence rules for that channel. Also, if an agent is non adherent overall, but adherent for a channel, the agent is added to the head count for the activities for that channel.

Adherence Details View

Use the Adherence Details view to examine individual agents' adherence statuses.

Displaying the Adherence Details View

To display the Details view:

1. Do one of the following:
    - In the Modules tree, select **Adherence** > **Details** module.
    - If you are in the Adherence Graphical view, use the **Adherence** drop-down list (on the right side of the toolbar) to select the **Details** module.
2. In the Objects tree, select the teams or agents you want and click **Get data**.
   If you previously selected teams or agents in the Adherence Graphical view, these selections remain. You can modify them if you want to.
   You can expand business units to display their sites and sites to display their teams and agents. You can select an entire site or several sites within a single business unit, or any combination of agents and teams within a business unit. For independent sites, you can select the entire site or any number of teams and agents within the site.

   ### Tip

   Selecting a site or its teams/agents in a different business unit clears any previous selection within the first business unit. Or (for independent sites) selecting a different site or its teams/agents clears your selections under the first site.

The **Details** table is populated with adherence data for the selected agents and/or teams.

In the Adherence Details view, you can view the multi-channel adherence details by clicking the arrow in first column of a specific row to expand it. For more information, see Adherence Per-Channel. To export this data to a report or in CSV-friendly format, see the Agent States Report.

Reading the Details Table

The table columns list the following information for each agent:

- Last and First name
- Team
- Scheduled state group
- Current state

- Duration of non-adherence
- Channels (optional—use the Detail Options dialog box to select this column if you want to see it)
- Adherence State (optional—use the Detail Options dialog box to select this column if you want to see it)
- Shift start time (optional—use the Detail Options dialog box to select this column if you want to see it)

> **Tip**
> If you include the **Shift Start** column but an agent has no shift, the cell for the agent in this column is empty.

- Site (optional—use the Detail Options dialog box to select this column if you want to see it)

Colors indicate each agent's degree of non-adherence: Adherent, Non-adherent, or Severely non-adherent (that is, non-adherent for more minutes than a defined threshold allows). The Legend below the table identifies each color's meaning.

Customizing the Table

You can use the following options to customize the table's display:

- By default, agents are ranked according to non-adherence. Therefore, the agent who is out of adherence the longest appears at the top of the list. You can sort the display according to different columns (except for **Scheduled State Group**) by clicking the column headers.
- To filter the displayed information by state or by reason (aux) code, click the **Filter** button on the **Actions** toolbar or select **Settings** from the **Actions** menu.
- To change which columns appear, click the **Options** button on the **Actions** toolbar or select **Options** from the **Actions** menu.
- Agent names do not appear if the following option in the WFM Web Application object is set to `true`: **Options** tab > **Options** section > **HideNames**.
- The display is updated at a user-defined interval, as described in the Adherence overview.

Adherence Per-Channel

If agents in a specific site perform work on multiple media channels, you can view real-time states, schedule states, and adherence sub-statuses for each channel separately. The optional columns **Duration of Non-adherence** and **Channels** display time interval and name of channels, on which a particular agent is not adherent. An agent could be non-adherent on more than one channel at any given moment. If an agent is adherent, the **Channels** column on the aggregated level is empty.

Displaying Real-Time Adherence Per-Channel

To view the multi-channel adherence details for a specific agent in the **Adherence Details** view, click the arrow in the first column of that row to expand it. The expanded rows contains information about the selected agent for each channel and the aggregated adherence.

In the figure below (click to enlarge it), agent 1213 is working on more than one channel and the row is expanded to show the duration of non-adherence for each channel.

The aggregated state is displayed in the first row and, depending on the schedule state group configuration, might also be the only row. The dialog displays all channels, whether adherent or not. When the dialog is opened, the data refreshes when the main Adherence Details view refreshes.

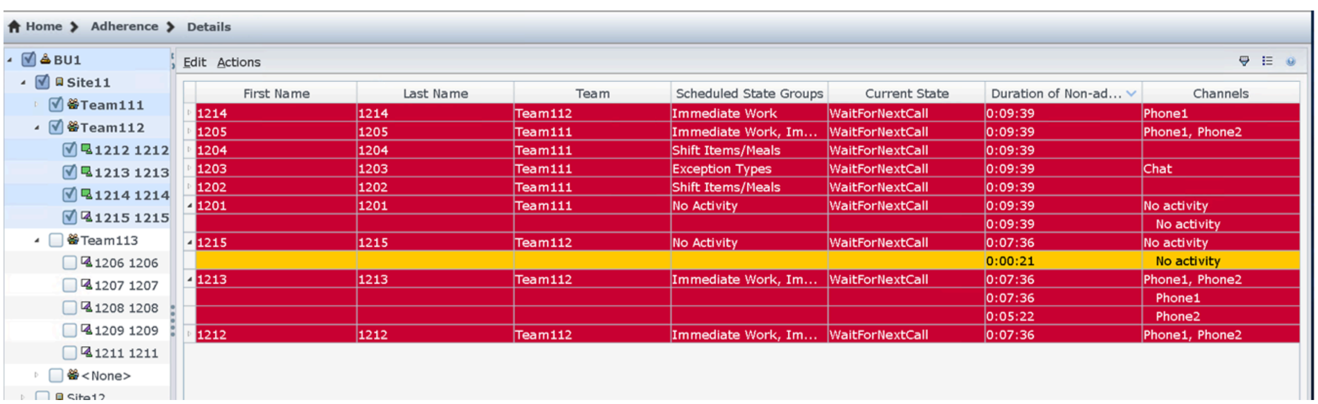


Figure: Multi-Channel Adherence Details

Adherence Filter Dialog

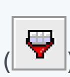
Use the **Adherence Filter** dialog box to filter the items displayed in the data pane.

1. In the Adherence Details view or in the Adherence Graphical view, click the **Filter** button on the **Actions** toolbar or select **Filter** from the **Actions** menu.
   The **Adherence Filter** dialog box appears. It contains four tabs that present four different ways to filter the data that appears in the **Data** pane:
   - **Scheduled State Groups**—This tab displays a hierarchical list of items corresponding to the current selection(s) on the **Object** pane:
     - Business Unit (BU)—Sites—Schedule State Groups if the object pane selection is a BU or multiple sites.
     - Site—Schedule State Groups if the selection is only one site.
   - **Genesys States**—This tab displays all possible Genesys states.
   - **Adherence Statuses**—This tab displays all four possible statuses: Adherent, Non-adherent, Severely non-adherent, and No information.
   - **Activities**—This tab displays a hierarchical list of items corresponding to the current selection(s) in the object pane:
     - BU–Sites–Activities if the object pane selection is a BU or multiple sites.
     - Site–Activities if the object pane selection is only one site.
2. Clear an item's check box () to filter that item from the displayed data.
3. To filter on user-defined Reason codes, select the **Filter using the following reason** check box; then type the appropriate code in the text box to its right.

   ## Important
   The specified reason code must not contain any spaces inside, or at the end of, the key value.
4. Click **OK**.

The **Adherence Filter** dialog box closes and your filter selections are applied immediately. They will continue to apply until you change them or log off.

Tip

- In the toolbar, the filter icon is blue () if all defaults are in effect and red () if any are not.

- The Adherence Details view updates automatically if you change your selection(s) on the Object pane. Also, if you select agents or teams in another site, then their selection under the **Scheduled States** tab returns to the default, `All`.
- Items that you have configured to appear are displayed in the **Scheduled State Groups** and **Genesys State** tabs. Schedule State Groups are configured in WFM, see Scheduled State Groups. Genesys states are configured in Genesys Administrators.
- You can also use the **Filter** dialog in the Adherence Graphical view. Changes that you make in one view apply to both views.

Adherence Details Options Dialog

Use the **Options** dialog box to select which columns should appear in the Adherence Details view:

1. In the Adherence Details view, click the **Options** button on the **Actions** toolbar or select **Options** from the **Actions** menu.
   The **Options** dialog box appears. When you select a check box, the corresponding column appears in the **Adherence** table:
   - **Shift Start Time** check box:
     - If an agent is already working during the period shown in the Adherence Details view, this column shows the start time of the current shift. If the shift start time is the previous day, the time has a minus sign (-) in front of it.
     - If an agent is not currently on a shift, this column shows the next scheduled shift start time. If the shift starts on the following day, the time has a plus sign (+) in front of it.
   - **Site** check box. This column displays each agent's site.
   - **Adherence State** check box. This column displays each agent's current state of adherence.

     .
   - **Channels** check box. This column displays agent adherence for each configured media channel.
2. Click **Apply**.
   The Adherence Details view reappears. It is automatically updated to display the columns you selected.

> **Tip**
> When unchecked, the **Channels** column is not hidden if any agent adherence details are expanded. If none are expanded and the check box is unchecked, the column is hidden. See examples in the figures below (click to enlarge them).

Figure: No Multi-Channel Adherence Details: Not expanded—Channel column hidden

Figure: Multi-Channel Adherence Details: Expanded—Channel column displayed

Adherence Graphical View

Use the Adherence Graphical view to see a pie-chart summary of agents' adherence states.

Displaying the Adherence Graphical View

To display the Graphical view:

1. Do one of the following:
   - In the Modules tree, select **Adherence** > **Graphical module**.
   - If you are in the Adherence Details view, use the **Adherence** drop-down list (on the right side of the toolbar) to select the Graphical module.
2. In the Objects tree, select the teams or agents that you want, and then click **Get data**.
   If you previously selected teams or agents in the Adherence Details view, these selections remain. You can modify them if you want to.

   You can expand business units to display their sites and expand sites to display their teams and agents. You can select an entire site or multiple sites within a single business unit, or any combination of agents and teams within the business unit. For independent sites, you can select the entire site or any number of teams and agents within the site.

   Tip

   Selecting a site or its teams/agents in a different business unit clears any previous selection within the first business unit. Or (for independent sites) selecting a different site or its teams/agents clears your selections under the first site.

   The pie chart displays adherence data for the selected agents and/or teams.
3. To filter the displayed information by state or by reason (aux) code, click the Filter button on the Actions toolbar or select Settings from the Actions menu.

How to Read the Chart

The pie chart summarizes the share of agents in each of the following adherence states:

- Adherence.
- Non-adherence.
- Severe non-adherence. (Severe non-adherence means that the agent has been non-adherent for more minutes than a defined threshold allows. The threshold is set at the site level.)

Each category is represented by a colored wedge in the pie chart. The Legend (below the chart) identifies each color's meaning. If no data is available, the whole chart is gray.

Beside each wedge, the first number shows the percentage of agents in the category. The second number shows the actual number of agents in the category.

Reports

Use WFM Web's Reports features to generate a variety of Configuration, Policies, Calendar, Forecast, Schedule, Performance, Adherence, and Audit reports. (See the Reports List for details about the reports available.) Once generated, the reports appear in the Report Viewer.

Report Viewer Features

With the Report Viewer, you can:

- View all information contained in the report.
- Print the report. You can create many reports in CSV (comma-separated values) format, which is easily opened with spreadsheet software.
- Export the report to a local file.
- Regenerate the report, using the same or modified settings.
- Review an already generated report.

Viewing Reports

To view all pages of a multi-page report, use the following navigation buttons on the Reports Viewer's toolbar (these look like the physical buttons on video or Compact Disk players):

- To move one page forward or back, click **>** or **<** (respectively).
- To jump to the final page or back to the first page, click **>|** or **|<** (respectively).
- To jump to a particular page, type the page number into the first text box between the **>** and **<** buttons and then press **Enter**.

To zoom to a different magnification:

- Use the drop-down list to select a different **%**, **Page Width**, or **Whole Page**.

Report Viewer displays reports based on the selections that you made in the Reports Wizard. To change these settings, see Using Reports as Templates.

Printing Reports

To print a copy of a report, click the Printer icon on the Report Viewer toolbar.

> **Tip**
> Do not use WFM to print reports that you create in ".csv friendly format," because the result may be truncated. To print such a file correctly, open it in a program that reads the .csv format, and then print it.

Exporting Reports to Local Files

1. Click the **Save As** button on the **Actions** toolbar.
   A dialog box appears.
2. Select a report format from the **Report Format** drop-down list.
3. Click **OK** or **Apply**.
4. If a **File Download** dialog box appears, click **Save** or **OK**.
   This confirms that you want to save (not open) the file and displays a final dialog box.
5. Adjust the report's destination folder and file name.
6. Click **Save** or **OK**.

Using Reports as Templates

You can define and generate a new report based on the current report's settings (including all of your selections in the Reports Wizard).

1. Click the **Use as Template** button on the **Actions** toolbar.
   The current report's first wizard screen appears. Each screen retains the last selections you made.
2. Proceed through the wizard screens, changing your selections as necessary on each screen.
3. Click **Finish** on the last screen.
   The Report Viewer displays the new report.

Reviewing Reports

Once a report has been generated, you can reopen and review it without regenerating it:

1. In the **Objects** pane, click the report name or expand its expand/collapse control.
   Any generated copies of this report appear in the tree, labeled by the date and time they were generated.
2. Double-click a generated report to review it.
   The report opens in the Report Viewer.

Copies of generated reports remain in the Objects tree until you either close them or exit WFM Web.

Closing Reports

To close a displayed report:

- Click the **Close** button () on the **Actions** toolbar.

This clears the working pane and removes this report (whether standard or generated) from the Objects tree. However, your last Reports branch remains selected in the Modules tree.

Reports List

Use the Modules tree's Reports branch to generate the following reports (grouped here by category):

Configuration Reports

- Activity Properties Report—Includes hours of operation, skills, and activity set assignments.
- Shared Transport Report—Includes Shared Transport name, business unit, site, bus, status, size, the list of agents who are participants in this Shared Transport, and their team names.

Policies Reports

- Agent Properties Report—Includes hire date, contract, wage, and skills.
- Contract Properties Report—Includes daily, weekly, schedule planning period paid hours, daily availability settings, synchronization settings, days off settings, and assigned shifts.
- Shift Properties Report—Includes shift duration, start and end times, days of the week, contract assignments, and break settings.
- Rotating Pattern Properties Report—Includes weekly pattern information, shifts, and activities.

Calendar Reports

- Calendar Items Report—Summarizes agent rotating patterns, availabilities, days off, shifts, working hours, times off, and exceptions for the selected time range.
- Time-Off Report—Lists all preferred, granted, declined, and scheduled time off in a selected time range for selected agents. Optionally includes time-off balances for all the time-off types selected.
- Time-Off Balance Report—Displays time-off balances for time-off types.
- Time-Off Management Report—Displays granted, preferred, declined, and scheduled time off. It includes time-off balances for all the time-off types selected.

Forecast Reports

- Forecast Report—Forecast values for Calculated Staffing, Required Staffing, Interaction Volumes, Average Handling Time (AHT), Service Level, Average Speed of Answer (ASA), Percentage of Interactions Abandoned, and Maximum Occupancy. Shows these values for selected dates and selected targets (activities, multi-site activities, business units, or sites).
- Forecast Graphs Report—Graphic presentation of forecast values for Calculated Staffing, Required Staffing, Interaction Volumes, and AHT. Graphs these values for selected dates and selected targets (activities or multi-site activities).

Performance Reports

- Actual Overhead Report—Forecast and scheduled agent information, including overhead figures.
- Workforce Performance Report—Average percentage of the deviation between Forecast, Required, Scheduled, and Actual staffing.
- Contact Center Performance Report—Number of agents, interaction volumes, AHT, service level, ASA,

and percentage of interactions abandoned. Shows these statistics for activities, multi-site activities, sites, or business units.

- Contact Center Performance Graphs Report—Forecast and actual adherence data for selected activities displayed in a graph format.

Schedule Reports

- Schedule States Report—Agent schedule states, organized by team.
- Schedule State Totals Report—Total durations of scheduled states for agents, teams, or sites, over a selected period.
- Individual Schedule Report—Paid hours and scheduled states for the selected agent.
- Team Schedule Report—Total hours, paid hours, effective hours, and schedule state information for all agents on a selected team.
- Activity Weekly Schedule Report—Total employment figures (full-time equivalents) for the selected activity, and paid, effective, and noneffective paid hours for each agent.
- Team Weekly Schedule Report—Weekly paid, effective, and noneffective hours for each agent on the selected team, as well as total hours (paid hours plus unpaid hours) for the team.
- Weekly Schedule Coverage Report—Calculated (or Required) and Scheduled Staffing for a specific activity or site; difference between Calculated and Scheduled Staffing; and total staffing hours.
- Scheduled Budget Report—Regular, overtime, and total budgeted hours for each agent within a team.
- Agent Comments Report—Comments entered for agents in the **Comments** text box of the schedule.
- Schedule Validation Report—The **Schedule Validation** window's data in a report format. If the configuration settings lead to a disparity between the staffing requirements and the actual schedule, the **Schedule Validation** window records the problems. It also indicates what parameters need to be changed to correct the disparity.
- Schedule Trade Report—Schedule trade participants (proposer and respondent), dates involved, approval status, approving supervisor, and comments.
- Schedule Summary Report—Coverage, headcount; service level percentages; scheduled and forecasted for interaction volume, AHT, and budget. Optional columns include published coverage and the difference between schedule coverage based on the current Master Schedule and schedule coverage based on the baseline Master Schedule.
- Schedule Marked Time Report—Agent marked time, organized by team.
- Schedule Marked Time Totals Report—Total durations of marked time for agents, teams, or sites, over a selected period.
- Schedule Bidding Report—Includes ranking system, agent, team, agent's relative position in the bidding process, agent's original bid number, and more.
- Weekly Schedule Report—Includes date range, agent, paid hours, effective hours, non-effective hours, planning period hours, totals, and more.

Adherence Reports

- Agent Adherence Report—All schedule non-adherence for selected agents.
- Adherence Totals Report—Average adherence percentage for selected teams or sites, with calculated agent adherence.
- Agent States Report—A timestep-by-timestep account of each selected agent's state throughout the

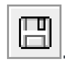
selected days.

Audit Reports

- Calendar Audit Report—Insertion/deletion/editing of Calendar items. Also granting/declining Calendar items, and making Calendar items Preferred.
- Schedule Audit Report—Publishing/cleanup, modification of Master Schedule including insertions, edits, and deletions.
- Configuration Audit Report—Shows configuration object (data) types that have been associated with specific sites and users, including the SYSTEM user.

Saving Reports to Files

To export a report to a disk file:

1. In the **Actions** toolbar, click **Save As** .
   A dialog box appears.
2. Select a report format from the **Report Format** drop-down list.
3. Click **OK** or **Apply**.
4. If a File Download dialog opens, click **Save** or **OK**.
   This confirms that you want to save (not open) the file and displays a final dialog.
5. Adjust the report's destination folder and file name.
6. Click **Save** or **OK**.

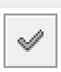
Reports Scheduler

Use this module to schedule reports, and to view and edit those schedules.

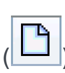
When you select **Reports Schedule** in the module pane, a list of the schedule(s) you have created appears in the data pane. The list is a grid that has these columns:

Enabled	Cells in this field can contain the values true or false.
Name	Name of the report.
Report type	Type.
User	User who created the schedule.
Schedule	Lists the specifics of the schedule.
Next run	Lists the date / time of the next run of a recurring report.

Commands (also on the Actions menu)

Icon	Name	Description
	**New**	Display the **Scheduled Report Task** dialog in the data pane.
	**Edit**	Edit the selected overlay using a limited version of the **Scheduled Report Task** dialog.
	**Delete**	Delete the selected overlay.
	**Show All**	This button is a toggle. Select it to display all report schedules, that have been created by all users (the icon becomes darkened). Clear to display only schedules that have been created by the current user.
	**Enable**	Enable the selected report.
	**Disable**	Disable the selected report.

To schedule a report:

1. Select **Reports Scheduler** in the modules pane.
2. Click the **New** () icon or select **New** from the **Actions** menu.

The **Scheduled Report Task** dialog appears in the data pane.

3. For each page of the dialog, make the appropriate selections and click **Next**.
4. On the final page, click **Finish**.

Scheduled Report Task Dialog:

The pages are:

- Scheduled report task page
- Data page
- Date Range page
- Pages that correspond to your selection in the **Report Type** field.

Scheduled Report Task page

There are three sections on this page.

General Parameters:

- **Name** — Enter a name for the schedule task.
- **Report type** — Select a report type from the drop-down menu.
- **Export to** — Select an output format from the drop-down menu.

Run Time:

- **Start date** — Select or enter a start date to generate the report.
- **End date** — Enable by clicking the **Enable end date** check box, then select or enter an end date to generate the report.
- **Run time** — Select or enter a time of day to generate the report.
- **Time Zone** — Select the time zone from a drop-down list.
    - Select **Local** or **Configured** time zones. If you select **Local**, the report generation time is set to the time zone of the host on which WFM Daemon is running.

Frequency:

- **Daily** — Specify that the report will be produced every day.
- **Weekly** — Also specify one or more days of the week by clicking the corresponding check box(es). Default: all days of the week are checked.
- **Monthly** — Also specify the day of the month by selecting or entering a day in the **Day of month** field. Default: 1.

Data page

Available User:

- Select the check box of every user who you wish to be able to see the generated report.

All subsequent pages that appear correspond directly to the report type. (For example, if you select **Time-Off Balance Report** in the **Report Type** field (in the **General Parameters** area below), then see the Time-Off Balance Report topic in this Help for descriptions of the rest of the pages.

Date Range page

You are specifying the range of data that the report will contain.

Start Date Offset:

- Adjust the data's starting date, relative to the start date of the report's generation. You can select a positive or negative integer, or 0 (zero, the default). The increment is Days.

End is Relative to [start date | generation date]:

- Specify if the data's ending date will be relative to the data's start date (specified above) or the data's generation date (the Run Time date, which you specified on the first page).
- Adjust the data's ending date, relative to your selection. You can select a positive or negative integer, or 0 (zero, the default). The increment is Days.

If your selection is incorrect, an error message will appear to explain why.

Reports Generated

Select **Generated Reports** in the module area to display a grid that lists scheduled reports that have already been generated. Select a report in the list and use these controls to manage it:

Delete button—Remove the selected report. You must be the creator of the scheduled report task or have the right to access all scheduled report tasks.

Show All button—This a toggle. Select it to display all reports generated that have been created by all users (the icon becomes darkened). Clear it to display only reports that have been generated by the current user.

Save As button—Download the selected report in the format that it was saved after generation. A standard **Save File** dialog appears.

The grid has the following columns: **Name**, **Report type**, **User**, **Time** (date and time), and **Status** (information about a report's generation).

To specify the network path to store generated reports, use Genesys Administrator to modify or create the option **[Reports] PathToAutoGeneratedReports** in the WFM Web application. See the *Workforce Management Options Reference*.

See also Creating New Sections and Options.

Configuration Reports

The Configuration report summarizes the configuration settings for WFM objects. (For a complete list of all WFM reports, see the Reports List.)

The Configuration reports are:

- Activity Properties Report.
- Shared Transport Report.

To create a report, click that report's link (above) and follow the steps.

Report Security Restrictions

You can view and print reports only for those sites for which you have security access.

Date Restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.
- If you select intra-day granularity, the **End Date** selector is disabled.

Activity Properties Report

To create an Activity Properties Report:

1. On the **Reports** tab, select **Configuration Reports** from the Views menu.
2. Select **Activity Properties Report** from the list on the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. On the **Data** screen, select the activities you want to include in the report.
   You can expand business units to display their sites; you can expand sites to display their activities. You can select any combination of activities from multiple sites.
6. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Activity Properties Report

Site [header]	The selected site, its time zone, and the maximum number of seats available.
Activity	Each activity that you selected to include in the report.
Hours of Operation (Start Time, End Time)	The start and end times for each activity on the indicated day in hh:mm format. (A plus sign (+) before the end time indicates that the activity ends on the next day.)
Maximum Simultaneous Users	The maximum number of agents scheduled to perform each activity at any one time.
Minimum Staffing	The minimum staffing levels configured for each activity. Minimum Staffing Level can be shown as a percentage or shown as number of agents (see Activity Properties). If the **Minimum Staffing Level** parameter is configured as percentage, then the value is shown as a percentage; For example, 20%. If set as agents, then this value is shown as a number; For example, 20.
Skills (Min-Max Levels)	The skills, and minimum and maximum skill levels, configured for each activity.
Activity Set Name	The name of the activity set in which the activity is included (if applicable).

Shared Transport Report

Tip

Shared Transport is known by many different names worldwide—for example, bus, carpool, ride share, lift share, and paratransit. See Wikipedia for details.

To create a Shared Transport Report:

1. On the **Reports** tab, select **Configuration Reports** from the Views menu.
2. Select **Shared Transport Report** from the list on the Objects pane.
   The Reports wizard's **Header** page, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. On the **Data** page, select the agents you want to include in the report.

   ## Tip

   You can expand business units to display their sites; you can expand sites to display their agents. You can select any combination of agents from multiple sites.

6. On the **Shared Transport** page, select the shared transport items you want to include in the report.
7. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Shared Transport Report

Shared Transport Report	The report title.
Each Shared Transport in the report has this information in its header:	
Business Unit field	Business unit of the shared transport.
Site field	Site of the shared transport.
Transport field	Shared transport name.
Status field	Status of the shared transport.
Comments field	Comments (if any) that are attached to the shared transport.
This is the bus with maximum size *nn* field	Maximum size of the shared transport, if it is a bus.

Below the header, each agent in the shared transport is listed on a separate row, with these columns:	
No.	Number of the row.
Agent	Agent name.
Team	Agent's team name.

Policies Reports

Policies reports summarize the properties of agents, contracts, shifts, and rotating patterns. (For a complete list of all WFM reports, see the Reports List.)

The Policies reports are:

- Agent Properties Report.
- Contract Properties Report.
- Shift Properties Report.
- Rotating Pattern Properties Report.

To create a report, click that report's link (above) and follow the steps.

Report Security Restrictions

You can view and print reports only for those sites for which you have security access.

Date Restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.
- If you select intra-day granularity, the **End Date** selector is disabled.

Agent Properties Report

To create an Agent Properties Report:

1. On the **Reports** tab, select **Policies Reports** from the Views menu.
2. Select **Agent Properties Report** from the list in the Objects pane.
   The Reports Wizard's first screen, Header, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. On the **Data** screen, select the agents that you want to include in the report.
   You can expand business units to display their sites, teams, and agents. You can select any combination of agents or teams, from multiple sites.
6. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Agent Properties Report

Site [header]	The report is organized by sites, by teams within each site, and site time zone.
Agent	Name of each agent included in the report.
ID	Agent’s identification number.
Hire Date	Date that agent was hired.
Termination Date	Date that agent was terminated.
Rank	Agent's rank set in Agent Properties.
Contract	The contract type assigned to agent.
Rotating Pattern	The agent's rotating pattern, if one was assigned.
Wage	The current wage set for the agent.
Skills (Level)	The skills that have been assigned to agent.
Activities	List of activities that the agent can work on.
Comments	Any comments for agent that were entered during configuration.
Time-Off Rule	Time-off rule assigned to agent.
Time-Off Types	All time-off types associated with time-off rule.
Last Carry-Over Date	Most recent date for carry-over of unused time-off hours.
Hours Carried Over	Number of time-off hours carried over from the previous year to the current one.
Stop Date	Date when the Time-Off Rule became inactive for agent.

Contract Properties Report

To create an Contract Properties Report:

1. On the **Reports** tab, select **Policies Reports** from the Views menu.
2. Select **Contract Properties Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. On the **Data** screen, select the contracts that you want to include in the report.

> **Tip**
> You can expand business units to display their sites, teams, and agents. You can select any combination of agents or teams, from multiple sites.

6. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Contract Properties Report

Site [header]	The selected site, its time zone, and the (first) selected contract. Each subsequent contract is displayed separately.
Contract Name	The name of the contract whose properties are displayed below.
Daily Working Hours	The number of daily paid hours defined for this contract. Agents assigned to the contract must have at least this number of paid hours each day. This value is aggregated to the three report statistics: **Min.**, **Std.**, and **Max.** representing the minimum, standard, and maximum number of paid hours per day.
Weekly Working Hours	The number of weekly paid hours defined for this contract. Agents assigned to the contract must have at least this number of paid hours each week. This value is aggregated to the three report statistics: **Min.**, **Std.**, and **Max.** representing the minimum, standard, and maximum number of paid hours per week.
Schedule Planning Period Working Hours	The number of daily paid hours defined for the schedule planning period for this contract. Agents assigned to the contract must have at least this

	number of hours within the schedule planning period. This value is aggregated to the three report statistics: **Min.**, **Std.**, and **Max.** representing the minimum, standard, and maximum number of paid hours per schedule planning period.
Weekly Working Days	The number of weekly working days defined for this contract. Agents assigned to the contract must be available to work at least this number of days each week. This value is aggregated to the two report statistics: **Min.** and **Max.** representing the minimum and maximum number of working days per week.
Max. Consecutive Working Days	The maximum number of consecutive working days defined for this contract. Agents assigned to the contract cannot exceed this number of consecutive working days.
Synch. Period	The period of time over which synchronization occurs.
Synch. of Daily Schedules Flexibility	The number of hours within which the daily schedule is assumed to be synchronized.
Synch. Type	The type of synchronization used for the contract, such as shifts between days off, one week or a period of weeks, or the Schedule Planning Period.
Weekdays for Synch.	The weekdays on which synchronization will occur.
Daily Availability (Start time and End time)	The Start and End times that the agent assigned to the contract is available to work each day.
Weekend First Day	The day that is assigned or designated as the first day of the weekend, such as Friday, Saturday, or Sunday.
First Weekend Days Off	The number of times that the agent assigned to the contract can have the first weekend day off. This value is aggregated to the three report statistics: **Min.**, **Max.**, and **Enabled** representing the minimum and maximum number of first weekend days off allowed for the contract, and whether or not the restriction is enabled (Yes, No).
Second Weekend Days Off	The number of times that the agent assigned to the contract can have the second weekend day off. This value is aggregated to the three report statistics: **Min.**, **Max.**, and **Enabled** representing the minimum and maximum number of second weekend days off allowed for the contract, and whether or not the restriction is enabled (Yes, No).
Both Weekend Days Off	The number of times that the agent assigned to the contract can have the both weekend days off. This value is aggregated to the three report statistics: **Min.**, **Max.**, and **Enabled** representing the minimum and maximum number of both weekend days off allowed for the contract, and whether or not the restriction is enabled (Yes, No).

Each category is an element of the Contract/Site combination that is listed in the report header.

Key

- **Min.**—Minimum
- **Std.**—Standard
- **Max.**—Maximum
- **Synch.**—Synchronization
- **Shift** table lists all shifts covered by the contract.

Shift Properties Report

To create a Shift Properties Report:

1. On the **Reports** tab, select **Policies Reports** from the Views menu.
2. Select **Shift Properties Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. On the **Data** screen, select the shifts to include in the report.
   You can expand business units expand to display their sites, and expand sites to display their shifts. You can select any combination of shifts from multiple sites.
6. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Shift Properties Report

Site [header]		The selected site, its time zone, and the (first) selected shift. Each subsequent shift is displayed separately.
Shift Name		The name of the shift whose properties are displayed below.
Min. Paid Hours		The minimum number of hours defined for this shift. All contracts assigned to the shift must be available to work at least this number of hours.
Max. Paid Hours		The maximum number of hours defined for this shift.
Earliest Start Time		The earliest time that this shift can start.
Latest Start Time		The latest time that this shift can start.
Earliest End Time		The earliest time that this shift can end.
Latest End Time		The latest time that this shift can end.
Days of Week		Days on which this contract can be scheduled.
Day Off Rule		Rule for scheduling this shift. (For example, one possible value is

		`Next day is not off.)`
Distrib. Period		Distribution period for this shift.
Min Distrib.		Minimum amount of time that this shift should be scheduled during the Distribution Period.
Max Distrib.		Maximum amount of time that this shift should be scheduled during the Distribution Period.
Min. Distance Between Shift Items		The shortest amount of time allowed between shift items (breaks and meals).
Max. Distance between Shift Items		The longest amount of time allowed between shift items (breaks and meals). Also applies to the distance from shift start to first shift item and from last shift item to shift end.
Task sequences usage		The usage for Task Sequences during scheduling.
Task sequences [if applicable]	**Task Sequence Name**	The task sequence associated with the shift.
	Index	The position of the task-sequence item in the task sequence.
	Activity Set	The activity set on which the agent can work during the specified task-sequence interval.
	Min Duration	Minimum task sequence duration.
	Max Duration	Maximum task sequence duration.
	Fixed Position	Whether the task-sequence interval has strict bounds. Possible values are: • Task is flexible within the earliest start, latest end interval. • Start is fixed, end is flexible. • End is fixed, start is flexible. • Start and end are fixed.
Contracts		The contracts associated with the shift.
Shift Item sequences [if applicable]	**Min. Paid Hours**	The minimum paid shift duration for which this break and meal sequence takes effect. (This break and meal sequence cannot

		be applied to shifts shorter than this duration.)
	Allowed	Specifies if this Shift Item Sequence be used while scheduling (value can be Yes or No).
	Index	The position of the shift item in the Shift Item Sequence.
	Meal	Meals that are assigned to this Shift Item Sequence.
	Break	Breaks that are assigned to this Shift Item Sequence
Break [if applicable]	**Break Name**	The break associated with the shift.
	Index	The position of the break in the shift's list of breaks. The same break may occur more than once.
	Duration	The length of the break.
	Min. Length From Shift Start	The minimum distance between the start of the shift and the start of the break.
	Max. Length from Shift Start	The maximum distance between the start of the shift and the start of the break.
	Min. Length from Shift End	The minimum distance between the end of the break and the end of the shift.
	Paid Time	Shows break is paid or not.
	Start Step	Shows increments between break start times. For example, with a start step of 15 minutes, agents leave for the break 15 minutes apart.
	Start Offset	Sets how many minutes past the hour in the interval in which a break may occur that the start step calculation should begin.
	Fixed Position	Shows whether the break has to occur at a specific point in the shift.
Meals [if applicable]	**Meal Name**	The meal associated with the shift.
	Index	The position of the meal in the shift's list of meals. The same meal may occur more than once.
	Earliest Start Time	The earliest time this meal can start.

	Latest End Time	The latest time this meal can end.
	Duration	The length of the meal.
	Min. Time Before Meal	The minimum distance between the shift's start time and the meal's start time.
	Min. Time After Meal	The minimum distance between meal's end time and the shift's end time.
	Paid	Whether the meal is paid or unpaid.
	Start Step	The meal's start times must be a multiple of this integer.

Rotating Pattern Properties Report

To create a Rotating Pattern Properties Report:

1. On the **Reports** tab, select **Policies Reports** from the Views menu.
2. Select **Rotating Pattern Properties Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. On the **Data** screen, select the rotating patterns you want to include in the report.

> **Tip**
>
> You can expand business units to display their sites, and expand sites to display their rotating patterns. You can select any combination of rotating patterns from multiple sites.

6. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Rotating Pattern Properties Report

Site [header]	The selected site.
Time Zone	The time zone for the site.
Rotating Pattern	The rotating pattern displayed.
Weekly Pattern	The name of displayed weekly pattern.
Min. Paid Hours	If **Use Weekly Paid Hours** is selected in the Weekly Rules pane, the minimum Paid Hours for the weekly pattern.
Max. Paid Hours	If **Use Weekly Paid Hours** is selected in the Weekly Rules pane, the maximum paid hours for the weekly pattern.
Day of Week	The weekly schedule settings for each day of the week.
Shift	The shift assigned on each day for each weekly schedule within the rotating pattern, if applicable.
Start Time	The shift's start time on each day of the weekly schedule, if applicable.
Paid Hours/Duration	The paid hours in the shift on each day of the weekly schedule, if applicable.
Estimated End Time	The estimated end time of the shift (start time +

	paid hours), if applicable.
Activities	The activities performed on each day for the weekly schedule. Displays `All Applicable` if **No Activity Limitation** was selected in the Rotating Pattern Activities pane for this Rotating Pattern.
Possible Day Off	Whether it is possible for the Schedule resolution process to assign this day as a day off.

Calendar Reports

Calendar reports list time off, days off, shifts, rotating patterns, availabilities, working hours, exceptions, and preferences. (For a complete list of all WFM reports, see the Reports List.)

The Calendar reports are:

- Time-Off Report
- Time-Off Balance Report
- Calendar Items Report
- Time-Off Management Report

To create a report, click that report's link (above) and follow the steps.

Report Security Restrictions

You can view and print reports only for those sites for which you have security access.

Date Restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.
- If you select intra-day granularity, the **End Date** selector is disabled.

Calendar Items Report

To create a Calendar Items Report:

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.
2. Select **Calendar Items Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result might be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. In the **Date Range** screen, select a start and end date for the report's data.
6. Optionally, you can select **Show comments/memo** to control whether comments or memos, if any, are shown on the report.
   Click **Next**.
7. On the **Data** screen, from the **Available Agents** list, select the agents that you want to include in your report.
   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select any combination of teams and/or agents from multiple sites.
   Click **Next**.
8. On the **Calendar Items** screen, select the check boxes for items that you want to include in the report, and clear the check boxes for items that you want to omit. Available selections are:
   - **Rotating Patterns**
   - **Availabilities**
   - **Days Off**
   - **Shifts**
   - **Working Hours**
   - **Times Off**
   - **Exceptions**
9. Click **Finish**.

Important

If **Exceptions** and **Times Off** are selected on the **Calendar Items** page, you must specify Exceptions and Time-Off types.

The report appears in the Report Viewer.

Understanding the Calendar Items Report

Site [header]	The selected site, its time zone, and the (first) selected team. The report is organized by team.
Date Period [header]	The dates covered in the report.
Agent	The name of each agent included in the report.
Date	The date on which the agent requested an exception, rotating pattern, or preference. The report can show multiple calendar items for agents.
Type	Rotating patterns, availabilities, days off, shifts, working hours, times off, or exceptions.
Description	The name of exception or preference, or description of rotating pattern.
Start Time	The time at which the calendar item starts.
End Time	The time at which the calendar item ends.
Status	Whether the calendar item is Scheduled, Not Scheduled, Granted, Declined, Preferred, or Recalled.
Comments/Memo	Optional column.

Time-Off Report

For the agents and dates that you select, this report displays granted, preferred, declined, and scheduled time off. It optionally includes time-off balances for all the time-off types selected.

To create a Time-Off Report:

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.
2. Select **Time-Off Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print such a file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. In the **Date Range** screen, select a start and end date for the report's data.
6. From the **Sort Options** drop-down list, select to sort the report by agent name, by the date for which time off was requested, or by the request's date submitted.
7. Optionally, you can select **Show time-off balance**.
8. Optionally, you can select **Show comments** to control whether comments, if any, are shown on the report.
9. Click **Next**.
10. On the **Data** screen, select the agents you want to see in the report.
    You can expand business units to display their sites, and expand sites to display their teams and agents. You can select any combination of teams and/or agents from multiple sites.
11. Click **Next**.
12. On the **Available Time-Off Types** screen, select the time-off types you want to see in the report. Time-off types are grouped by business units and sites.
13. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Time-Off Report

Site [header]	The selected site and its time zone.
Team [header]	The team to which the agents in the table below belong. If you selected more than one team, teams are listed in alphabetical order, with the data for agents in one team appearing before the next

	team name in the list.
Date Period [header]	The dates covered in the report.
Agent	The name of the agent whose information is displayed.
Date	The date for which the agent has submitted a time-off preference. The time-off balance shown in the **Balance** column is also for this date.
Description	The name of the time-off type.
Start Time and End Time	When the time-off period starts and ends. For a full-day time-off request, both columns say `Full Day`.
Status	Whether the time-off preference is Preferred, Granted, Declined, Recalled, Scheduled, or not Scheduled.
Date and Time Submitted	The time at which the time-off preference was made.
Balance	The agent's available time-off hours as of the date of the request.
Comments	Comments, if any, submitted with time-off item.

Time-Off Balance Report

For the agents and dates that you select, this report displays time-off balances for time-off types.

To create a Time-Off Balance Report:

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.
2. Select **Time-Off Balance Report** from the list on the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print such a file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. In the **Date Range** screen, select a start and end date for the report's data.
6. From the **Sort Options** drop-down list, select to sort the report by agent name or by the date for which time off was requested.
   Click **Next**.
7. On the **Data** screen, select the agents you want to see in the report.
   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select any combination of teams and/or agents from multiple sites.
   Click **Next**.
8. On the **Available Time-Off Types** screen, select the time-off types you want to see in the report. Time-off types are grouped by business units and sites.
9. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Time-Off Balance Report

Site [header]	The selected site and its time zone.
Team [header]	The team to which the agents in the table below belong. If you selected more than one team, teams are listed in alphabetical order, with the data for agents in one team appearing before the next team name in the list.
Date Period [header]	The dates covered in the report.
Agent	The name of the agent whose information is displayed.
Date	The date for which the agent has submitted a time-off preference. The time-off balance shown in the

	Balance column is also for this date.
Description	The name of the time-off type.
Balance	The agent's current number of available time-off hours of the type shown in the **Description** column, as of the date shown in the **Date** column.

Time-Off Management Report

For the agents and dates that you select, this report displays granted, preferred, declined, and scheduled time off. It includes time-off balances for all the time-off types selected.

To create a Time-Off Management Report:

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.
2. Select **Time-Off Management Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. In the **Date Range** screen, select a start and end date for the report's data.
6. Click **Next**.
7. On the **Data** screen, select the agents you want to see in the report.

> **Tip**
> You can expand business units to display their sites, and expand sites to display their teams and agents. You can select any combination of teams and/or agents from multiple sites.

8. Click **Next**.
9. On the **Available Time-Off Types** screen, select the time-off types that you want to see in the report.
   Time-off types are grouped by business units and sites.
10. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Time-Off Management Report

Report Header	
Site	The selected site and its time zone.
Time Zone	Time zone of the he selected site.
Team	The team to which the agent in the table below belongs.
Date Period	The dates covered in the report.
Agent	The name of the agent whose information is displayed.
Rules table columns:	This table lists data for each rule that applies to

	each time-off type in the report. The format is one rule per line, and one table per type/agent combination. **Time-Off Rule**, **Time-Off Type**, **Start date**, **End date**, **Carried Over**, **Carry Over Day**
Daily Status table (untitled) columns:	This table lists data for each date in the report. The format is one date per line, and one table per agent / time-off type combination. **Date**, **Balance**, **Accrued/Awarded**, **Credit**, **Carried Over**, **Used**, **Bonus Assigned**, **Bonus Used**, **Bonus Expired**, **Bonus Balance** Tip The **Used** column contains the sum of Granted + Preferred + Scheduled + Not Scheduled time-off hours which exceed bonus hours, but Not Scheduled hours are included only if the option CalendarOverScheduleData is enabled.
Instance Status table (untitled) columns:	This table lists data for each time-off instance that was either Granted, Declined, Preferred, Scheduled, or Not Scheduled. The format is one title per line / data line per instance. **Time-Off Type**, **Time-Off Status**, **Start Time**, **End Time**, **Paid Hours**, **Submitted On**, **Comments**

Forecast Reports

Forecast reports display key details of anticipated activity and staff requirements, in tabular and/or graph formats. (For a complete list of all WFM reports, see the Reports List.)

The Forecast reports are:

- Forecast Report.
- Forecast Graphs Report.

To create a report, click that report's link (above) and follow the steps.

Report Security Restrictions

You can view and print reports only for those sites for which you have security access.

Date Restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.
- If you select intra-day granularity, the **End Date** selector is disabled.

Forecast Report

To create a Forecast Report:

1. On the **Reports** tab, select **Forecast Reports** from the Views menu.
2. Select **Forecast Graphs Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box. Then (whether you entered a header or not) click **Next**.
4. On the **Scenario** screen, select a forecast scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Forecast.
5. On the **Date Range** screen:
   a. Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
   b. Select **Activity**, **Site**, **Multi-site Activity**, or **Business Unit** from the drop-down list.
   c. Click **Next**.
6. In the **Data** screen, select forecast targets.
   This page's tree displays activities, sites, multi-site activities, or business units (depending on your choice of target). If you selected a target other than business unit, the tree's business units expand to display their contents. You can make multiple selections.
7. You can display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the Staffing Display from FTE to Man Hours.
8. Click **Next**.
   On the **Forecast Data Types** screen, select the Data Types you want to include.
9. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Forecast Report

Site Information or Business Unit Information or Enterprise [header]	The site name and time zone, if you selected activity as the report's target. The business unit name and time zone, if you selected multi-site activity or site as the report's target. The enterprise, if you selected business unit as the report's target. (Each root is displayed separately.)
Activity, Multi-Site Activity, Site, or Business Unit [header]	The report is organized by activity, multi-site activity, site, or Business Unit – depending on the target that you selected in the Reports Wizard.

Date/Date Period [header]	The dates covered by the report. The report displays separate information for each target and date. This header shows the Date if you selected Intra-day granularity and Date Period for other granularities.
Time Step, Day, Week Of, *X* Weeks of, Month	The time period shown. The header and the column contents depend on the granularity that you selected.
Statistics/Options [columns]	The forecast value, for each period, for the display options that you selected in the wizard. The possible columns are: • Interaction Volume • Average Handling Time • Calculated Staffing • Required Staffing • Service Level • Deferred Service Level • ASA • Abandons Factor • Max. Occupancy • Historical data Interaction Volume • Historical data Average Handle Time Tip If you select a scenario, other than the Master Forecast, the historical data types in this list are not available
Total/Average for Activity/Site [footer]	The total or average forecast value for each statistic shown in the table for this activity or site. Tip If you generate reports in .CSV-friendly format, the **Total/Average for Activity** values are displayed in separate columns and not as a footer.
Total/Average for Site/Business Unit [footer]	The total and/or average forecast value for each displayed option for the displayed target.

Forecast Graphs Report

To create a Forecast Graphs Report:

1. On the **Reports** tab, select **Forecast Reports** from the Views menu.
2. Select **Forecast Graphs Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box. Then (whether you entered a header or not) click **Next**.
4. On the **Scenario** screen, select a forecast scenario or the Master Forecast and then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Forecast.
5. On the **Date Range** screen:
   a. Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
   b. Select **Activity** or **Multi-site Activity** from the drop-down list.
   c. Click **Next**.
6. You can display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the Staffing Display from FTE to Man Hours.
7. On the **Data** screen, select forecast targets.
   The tree's contents depend on your choice of target. You can expand business units to display their sites or multi-site activities. You can expand sites to display their activities. You can make multiple selections.
8. If you selected **Multi-site Activity** or **Activity** as the target:
   a. Click **Next**.
   b. On the **Forecast Data Types** screen, select the Data Types you want to include.
   c. Click **Finish**.

   The report appears in the Report Viewer.

Understanding the Forecast Graphs Report

Site or Business Unit [header]	The site, or Business Unit, and time zone included in the report.
Activity or Multi-Site Activity [header]	The activity or multi-site activity displayed in the following graph.
Date [header]	The dates covered by the report. The information in the report is shown separately for each activity,

	display option, and date.
Statistics/Options [graph bars]	Each display option is shown in a separate graph. The displayed statistic, and its units, are labeled on the left side. The possible columns are: • Interaction Volume • Average Handling Time • Calculated Staffing • Required Staffing
Timestep / Day / Week of / Month / *X* weeks of	The time period covered by each bar in the graph. The period depends on the granularity that you selected in the wizard.

Performance Reports

Performance reports display site performance measures in tabular and/or graph formats. (For a complete list of all WFM, see the Reports List.)

The Performance reports are:

- Actual Overhead Report.
- Workforce Performance Report.
- Contact Center Performance Report.
- Contact Center Performance Graphs Report.

To create a report, click that report's link (above) and follow the steps.

Report Security Restrictions

You can view and print reports only for those sites for which you have security access.

Date Restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.

Actual Overhead Report

To create an Actual Overhead Report:

1. On the **Reports** tab, select **Performance Reports** from the Views menu.
2. Select **Actual Overhead Report** from the list in the Objects pane.
   The Reports Wizard's first screen, Header, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
4. Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management (WFM) to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
5. Click **Next**.
6. On the **Date Range** screen, select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
7. You can display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the Staffing Display from FTE to Man Hours.
8. Click **Next**.
9. On the **Data** screen, select the sites that you want to include in the report's data.
   You can expand business units to display their sites. You can make multiple selections.
10. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Actual Overhead Report

Site or Business Unit [header]	The name and time zone of the site or business unit.
Date [header]	The dates that you selected in the Reports Wizard.
Timestep/Day/Week of/Month/X Weeks	The time periods shown in this column correspond to the granularity that you selected in the wizard.
Forecast	
Calculated Staffing	Calculated Staffing taken from Master Forecast on selected time period.
% Planned	Forecasted Total Planned Overhead for selected site on selected period.
% Unplanned Overhead	Forecasted Total Unplanned Overhead for selected site on selected period.

Schedule	
Coverage	The scheduled staffing coverage for an activity or multi-site activity.
% Planned Overhead	The percentage of time that the agent is scheduled for Schedule State Groups defined as Planned Overhead.
% Unplanned Overhead	The percentage of time that the agent is scheduled for Schedule State Groups defined as Unplanned Overhead.
Total/Average [footer]	The total or average for each statistic, over the report's displayed period. Displayed in Full-Time Equivalents (FTEs).

Workforce Performance Report

To create a Workforce Performance Report:

1. On the **Reports** tab, select **Performance Reports** from the Views menu.
2. Select **Workforce Performance Report** from the list in the Objects pane. The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management (WFM) to print reports that you created in ".csv friendly format," because the result may be truncated. To print such a file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Date Range** screen:
   a. Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
   b. Enter a **Percentage of Deviation Threshold**. (Periods whose actual values differ from the planned values by more than this percentage are listed as noncompliant.)
   c. Select a time zone.
   d. Select **Activity**, **Site**, **Activity Group**, **Multi-site Activity**, or **Business Unit** from the drop-down list.
   e. Click **Next**.
6. On the **Data** screen, select the targets that you want to include in the report's data.
   This page's tree displays activities, sites, activity groups, multi-site activities, or business units (depending on your choice of target). If you selected a target other than business unit, the tree's business units expand to display their contents. You can make multiple selections.
7. Click **Finish**. The report appears in the Report Viewer.

Understanding the Workforce Performance Report

Root/Site [header]	The name and time zone of the target or site.
Target/Activity or Site [header]	The report is organized by activity, site, business unit, or multi-site activity, depending on the target that you selected in the Reports Wizard.
Date/Date Period	The date or date period selected in the wizard.
Timestep / Day / Week of / Month / X Weeks of	Time periods, corresponding to the granularity that you selected in the wizard.
Actual	The actual staffing for each timestep.

Calculated	The calculated staffing for each timestep. The report shows the calculated value, the difference between calculated and actual values (that is, calculated minus actual), and the difference expressed as a percentage.
Required	The required staffing for each timestep. The report shows the required value, the difference between required and actual values (that is, required minus actual), and the difference expressed as a percentage.
Headcount	The scheduled staffing for each timestep. The report shows the scheduled value, the difference between scheduled and actual values (that is, scheduled minus actual), and the difference expressed as a percentage.
Deviation [footer]	The number of compliant periods. To be compliant, a period's actual values must differ from planned values by less than the **Percentage of Deviation Threshold** that you set in the wizard.
Deviation %	The percentage of compliant periods.

Contact Center Performance Report

To create a Contact Center Performance Report:

1. On the **Reports** tab, select **Performance Reports** from the Views menu.
2. Select **Contact Center Performance Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management (WFM) to print reports that you created in ".csv friendly format," because the result may be truncated. To print such a file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Date Range** screen:
   a. Select a Granularity and a corresponding Start Date and End Date. (Your Granularity selection may restrict your Date selections.)
   b. Select a time zone.
   c. Select the Target type – activity, activity group, multi-site activity, site, business unit – for which you want the report generated. If you select multi-site activity or business unit, the following check box appears: **Use Multi-site Activities**. Leave checked to aggregate report data by multi-site activities.
   d. Click **Next**.
6. On the **Data** screen, select the targets that you want to include in the report's data.
   This page's tree displays activities, sites, multi-site activities, or business units (depending on your choice of target). If you selected a target other than business unit, you can expand the tree's business units to display their contents. You can make multiple selections.
7. Click **Next**.
8. On the **Performance Data Types** screen, select the Data Types (statistics) that you want to include.
9. Click **Finish**.
   The report appears in the Report Viewer.

In addition to actual and scheduled data, the Contact Center Performance Report now includes forecast-related data. You can select the granularity (**15**, **30** or **60**) and select **Calculated** or **Required** forecast values.

Understanding the Contact Center Performance Report

Root/Site [header]	The name and time zone of the target or site.

Target/Activity or Site [header]	The report is organized by activity, site, business unit, or multi-site activity, depending on the target that you selected in the Reports Wizard.
Date or Date Period	The date or date period that you selected in the wizard.
Timestep / Day / Week of / Month / *X* Weeks of	The time periods shown in this column correspond to the granularity that you selected in the wizard.
Coverage	The scheduled and optimal coverage per period, the scheduled coverage minus the optimal coverage, the difference as an absolute value, and the difference as a percentage. See also **Variance**, where the calculation for optimal staffing (another name for optimal coverage) is described.
Headcount	The scheduled and actual agents per period, the scheduled number minus the actual number, and the difference as a percentage.
Interaction Volumes	The forecast and actual interaction volume per period, the forecast minus the actual, and the difference as a percentage.
AHT	The forecast and actual average handling time per period, the forecast minus the actual, and the difference as a percentage.
Service Level	The scheduled and actual service level per period.
Deferred Service Level	The deferred scheduled and actual service level per period.
Queue	The scheduled and actual number of interactions in the backlog queue at the end of the period.
ASA	The scheduled and actual average speed of answer for each period.
Abandoned (%)	The percentage of scheduled and actual abandons per period.
Total/Average [footer]	The value for Interaction volume is calculated as the sum of values in each timestep. The value for all other Data Types is calculated as the average of values in each timestep.

Contact Center Performance Graphs Report

To create a Contact Center Performance Graphs Report:

1. On the **Reports** tab, select **Performance Reports** from the Views menu.
2. Select **Contact Center Performance Graphs Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box. Then (whether you entered a header or not) click **Next**.
4. On the **Date Range** screen:
   a. Select a Granularity and a corresponding Start Date and End Date. (Your Granularity selection may restrict your Date selections.)
   b. Select a time zone.
   c. Click **Next**.
5. On the **Data** screen, select the activities that you want to include in the report's data.
   You can expand business units to display their sites, and expand sites to display their activities. You can select any combination of activities from multiple sites.
6. Click **Next**.
7. On the **Performance Data Types** screen, select the Data Types (statistics) that you want to include.
8. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Contact Center Performance Graphs Report

In addition to actual and scheduled data, the Contact Center Performance Graphs Report now includes forecast-related data. You can select the granularity (**15**, **30** or **60**) and select **Calculated** or **Required** forecast values.

Site [header]	The site's name and time zone.
Activity [header]	The report is organized by activity.
Date or Date Period [header]	The date or date period that you selected in the Reports Wizard.
Planned/Actual [legend]	Indicates how the report displays forecasted and actual data.
Graph Type	The graph's vertical axis identifies the displayed statistic (Interaction Volumes, Average Handling Time, or Number of Agents), and labels its units.
Timestep / Day / Week of / Month / *X* Weeks of	The graph's horizontal axis labels the time period covered by each of the graph's bars. The periods depend on the granularity that you selected in the

	wizard.

Schedule Reports

Schedule reports display detailed schedule settings, in tabular and/or graph formats. (For a complete list of all WFM reports, see the Reports List.) The Schedule reports are:

- Schedule States Report
- Schedule State Totals Report
- Individual Schedule Report
- Team Schedule Report
- Weekly Schedule Report
- Activity Weekly Schedule Report
- Team Weekly Schedule Report
- Weekly Schedule Coverage Report
- Scheduled Budget Report
- Agent Comments Report
- Schedule Validation Report
- Schedule Trade Report
- Schedule Summary Report
- Schedule Marked Time Report
- Schedule Marked Time Totals Report
- Schedule Bidding Report

To create a report, click that report's link (above) and follow the steps.

Report Security Restrictions

You can view and print reports only for those sites for which you have security access.

Creating a Report

1. In the Modules tree, click **Reports** (to expand the report categories); then click a category.
   A list of the selected category's reports appears in the working pane and in the Objects tree.
2. From either list, select the report that you want:

- Click a report's name in the working pane.
- Or click the report's name in the Objects tree.

After you select a report, the Reports Wizard's first page (Header Page) appears.

3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. Select the objects, dates, or other options that you want to include in the report.
The number of screens that follow the first one depends on the report you are creating.
   - Click **Next** after making your selections on each intermediate screen.
   - Make your selections on the final screen (which has a Finish button).
6. Click **Finish**.
A Progress message box appears. You can click Cancel to interrupt the report's generation.

When the report has been generated, the Report Viewer appears to display it. The report is also added to the Objects tree so that you can review it later.

> Tip
> For detailed explanations of what is displayed in each report, click the name of the report in the bullet list above.

Date Restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.
- If you select intra-day granularity, the **End Date** selector is disabled.

Schedule States Report

To create a Schedule States Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule State Totals** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenarios** screen, select a schedule scenario or the Master Schedule and then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Date Range** screen, select Start and End Dates and Times for the report.
   Optional: You can check the **Show filter on the first page of the report only** check box, then click **Next**.

   > ## Tip
   > You can select fewer weeks than are defined in the scenario that you selected in step 5.

7. On the first **Data** screen, select teams and/or agents.
   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select any combination of teams and/or agents from multiple sites.
8. Click **Next**.
9. On the second **Data** screen, select schedule state groups and states.
   You can expand business units to display their sites, and expand sites to display their schedule state groups and schedule states. You can select multiple schedule states across different sites.

   > ## Important
   > Schedule states that do not belong to any schedule state group are missing from this display, but you can include them in the report by selecting the site that includes them.

10. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Schedule States Report

Site [header]	The site name and time zone.
Selected Schedule State Groups and Schedule States [header]	A comma-separated list of the schedule state groups and schedule states that were selected in the wizard, and are applicable to the selected site.
Team [header]	Agents are displayed by team.
Date and Time Period [header]	The dates covered by the report, and time period covered each day.
Employee ID	The agent's company ID.
Agent	The agent whose information is displayed.
Date	The date on which the schedule state's shift begins.
Schedule State	The name of the schedule state.
Start Time	The schedule state start time.
End Time	The schedule state end time.
Duration	The duration of each schedule state.
Paid Hours	The paid hours for each schedule state.
Total Duration/Paid Hours for Agent *(not labeled)*	This total appears beneath the statistics for each agent. Duration: The total duration of all the agent's schedule states during the time range covered by the report. Paid Hours:The total paid hours for all the agent's schedule states during the time range covered by the report.
Total Duration/Paid Hours for Team	This total appears at the end of the report. Duration: The total duration of all selected agents on each selected team. Paid Hours: The total paid hours of all selected agents on each selected team.
Total Duration/Paid Hours for Site	This total appears at the end of the report. Duration: The total duration of all selected agents from all selected teams on the site. Paid Hours: The total paid hours of all selected agents from all selected teams on the site.

Tip

The duration of full-day time off and full-day exceptions in the report are computed according to these rules:

- The duration of paid, full-day time-off items and exceptions are equal to Paid Time.
- The duration of unpaid, full-day time-off items and exceptions are equal to Standard

Daily Paid Hours from the agent's contract.

If the **Start Time** and **End Time** values are specified for time-off items and exceptions, the duration is estimated as the difference between those values.

In Genesys Administrator, if the **Reports** > **TotalsInStatesReport** property is set to true WFM uses the daily totals for calculations.

Schedule State Totals Report

To create a Schedule State Totals Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule State Totals** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management (WFM) to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule and then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Date Range** screen, select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.) Then click **Next**.
7. On the **Target** screen, select **Agent**, **Team**, or **Site** from the drop-down list. Then click **Next**.
8. On the **Options** screen, check the **Exclude Date Without State** and **Show filter on the first page of the report only** check boxes, if required, then click **Next**.
9. On the first **Data** screen, select the targets (agents, teams, or sites) to include in the report.
   You can expand business units to display their sites. If you selected **Team** or **Agent** in the **Target** Page, you can further expand the tree's branches. You can select across multiple sites.
10. Click **Next**.
    On the second **Data** screen, select the schedule states to include.
11. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Schedule State Totals Report

The report takes one of two forms, depending on the target that you selected.

The Site Schedule State Totals Report

Enterprise [header]	The enterprise covered by the report.
Business Unit [header]	The name of each business unit included in the report.
Date Period [header]	The time range covered by the report.

Selected Schedule State Groups and Schedule States [header]	The schedule state groups and schedule states covered by the report.
Site	The name of each site included in the report.
Total Duration for Business Unit	The combined time that all the business unit's agents spent in the selected schedule states, over the report date range.

The Team Schedule State Totals Report

Business Unit [header]	The name of each business unit included in the report.
Site [header]	The name and time zone of the site.
Date Period [header]	The time range covered by the report.
Selected Schedule State Groups and Schedule States [header]	The schedule state groups and schedule states covered by the report.
Team	The name of each team included in the report.
Day	Each matching date in the selected date range.
Duration	The time each agent spent in the selected schedule states, for each day included in the report.
Total Duration [per Agent]	The total time each agent spent in the selected schedule states, over the report's date range.
Total Duration for Site	The combined time that all the site's agents spent in the selected schedule states, over the report's date range.
Total Duration for Team	The combined time that all the team's agents spent in the selected schedule states, over the report's date range.

Tip

The durations of full-day time off and full-day exceptions in the report are computed according to these rules:

- If the start and end are specified or estimated by WFM Server, then the duration is the difference between the end and start values.
- If the start and end are *not* specified or estimated:
  - The durations of paid full-day time off and exceptions are equal to paid time.
  - The durations of unpaid full-day time off and exceptions are equal to `Standard Daily Paid Hours` from the agent's contract.

Individual Schedule Report

To create an Individual Schedule Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Individual Schedule** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Date Range** screen, select a Start and End date for the report. Then click **Next**.
7. On the **Data** screen, select the agent(s) for whom to generate the report.
   You can expand business units to display their sites, teams, and agents.
8. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Individual Schedule Report

Site [header]	The site's name and time zone.
Team [header]	The selected agent's team.
Agent [header]	The selected agent's name.
Date Period [header]	The total date range covered by the report.
Employee ID	The agent's company ID.
Day	The date for each information set.
Paid Hours	Total number of paid hours the agent works on each displayed day.
Schedule State	The agent's schedule states on each displayed day.
Start Time	The time at which the agent is scheduled to start each scheduled state.
End Time	The time at which the agent is scheduled to end each scheduled state.

Team Schedule Report

To create a Team Schedule Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Team Schedule** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. Optionally, click the **Sort by shift start** check box. Then click **Next**.
7. In the **Date Range** Page, select a Start and End date for the report. Then click **Next**.
8. On the **Data** screen, select the team(s) for which to generate the report.
   You can expand business units to display their sites and teams.
   The report is sorted in alphabetical order by business unit, site name within each business unit, and team name.
9. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Team Schedule Report

Site [header]	The site's name and time zone.
Team [header]	The team covered by the report.
Date Period [header]	The date period covered by the report.
Day [header]	The report is organized day-by-day. This line identifies the first displayed date.
Agent	The name of each of the team's agents.
Total Hours	The agent's total hours (paid hours plus unpaid hours) for the day.
Paid Hours	The agent's paid hours for the day.
Effective Hours	The hours during which the agent is paid and working. (Activity work is included, but breaks are not.)

Schedule State	Schedule state and activity set information.
Start Time	The time at which the agent is scheduled to start each scheduled state.
End Time	The time at which the agent is scheduled to end each scheduled state.

Weekly Schedule Report

> **Important**
>
> You can view this report only if you have the Weekly Schedule Report security permission. See the Configuration > Roles topics for more information about security privileges.

To create a Weekly Schedule Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Weekly Schedule Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Data** screen, select the elements to include in the report.
   This screen's tree displays a hierarchical tree of business units, sites, teams and agents. You can expand each of the tree's elements to display its contents. You can make multiple selections.
7. On the **Date Range** screen, select a date range by one of two methods:
   - Select a Start and End Date.

     > **Important**
     >
     > If you selected the Master Schedule in step 5, you can select any number of weeks.
     > If you selected a different schedule in step 5, you can select any number of weeks – up to the total number of weeks which are defined in that scenario.

   - Select the check box **Planning Period** (not checked by default) to specify a planning period or week range.
8. Also on the **Date Range** screen, select a data type from the radio button group **Data Type To Show** to specify what will appear in the report. The possible values are: **Shift Start/End times**, **Total Paid Hours**, and **Shift or Schedule State Names**.

9. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Weekly Schedule Report

Site [header]	The name and time zone of the business unit or site.
Team [header]	Agents are displayed by team.
Date Period [header]	The total date range covered by the report.
Planning Period [header]	The total planning period covered by the report.
Employee ID	The agent's company ID.
Agent	The agent's name.
Weekdays	Columns for each day of the week.
Paid Hours	The agent's paid work hours per week.
Effective Hours	The agent's effective work hours per week.
Non-Effective Hours	The agent's noneffective work hours per week (that is, hours during which the agent is paid but not working, such as during paid breaks and paid days off).
Planning Period Paid Hours	The agent's paid work hours per planning period.
Totals for Paid Hours [row]	Total of the **Paid Hours** column.
Totals for Effective Hours [row]	Total of the **Effective Hours** column.
Totals for Non-Effective Hours [row]	Total of the **Non-effective Hours** column.
Totals hours for each week day [row]	Total of the **Weekdays** columns.

Presentation

The information in the finished report is grouped under the following headings:
Enterprise
Business Unit Name
Site Name
 Team Name
  Agent Name

Activity Weekly Schedule Report

To create an Activity Weekly Schedule Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Activity Weekly Schedule** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. Fill in the **Date Range** screen.
   a. Select a Start and End Date for the report.
      You can select multiple weeks for the report output, but your selection must be full weeks.
   b. Select **Show Required Staffing**, if required.
   c. In the **Data Type to Show** screen, select the **Start/End times**, **Total Paid Hours**, or **Shift or Schedule State Names** option, as required.
   d. Click **Next**.
7. Display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the Staffing Display from FTE to Man Hours.
8. On the **Data** screen, select the activity or activities for which to generate the report.
   You can expand business units to display their sites and activities.
9. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Activity Weekly Schedule Report

Site [header]	The site's name and time zone.
Activity [header]	The activity that is covered by the report.
Date Period [header]	The date range that you selected in the Reports Wizard.

Scheduled FTEs	The number of agents (full-time equivalents) scheduled for the activity on the selected days.
Calculated FTEs	The number of agents (full-time equivalents) in the calculated staffing for the activity.
Difference	The difference between calculated and scheduled FTEs.
Required FTEs	The number of agents (full-time equivalents) in the required staffing for the activity. This row and the next appear if you selected the **Show Required Staffing** check box.
Difference	The difference between required and scheduled FTEs.
Agent	The agent's name.
ID	The agent's identification number.
Days	Multiple columns display the agent’s start/end times (or paid hours, if **Paid Hours** check box was selected) for each weekday of the report period.
Weekly Work Hours–Paid	The agent's paid work hours per week.
Weekly Work Hours–Eff.	The agent's effective work hours per week.
Weekly Work Hours–NonEff.	The agent's noneffective work hours per week (that is, hours during which the agent is paid but not working, such as during paid breaks and paid days off).
Total Hours	The total number of paid-hours spent by all agents scheduled to work under the activity during the day. This row includes a total for each day, and a weekly total for each paid-hours category.
Total Paid Hours	The team's paid work hours per week.
Total Effective Hours	The team's effective work hours per week.
Total Non-Effective Hours	The team's noneffective work hours per week.
Total Hours for each week day	The team's paid work hours, for each day, per week.
Footnote	Indicates that the agent worked on a different activity during the specified time.

Presentation

The information in the finished report is grouped under the following headings:
Enterprise
Business Unit
Site
Week date range
Team
Activity
Agent

Team Weekly Schedule Report

To create a Team Weekly Schedule Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Team Weekly Schedule** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appear.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. Fill in the **Date Range** screen:
   a. Select a Start and End date for the report. You can select multiple weeks for the report output, but your selection must be full weeks.
   b. In the **Data Type to Show** screen, select a data type: **Start/End Time**, **Paid Hours**, or **Shift or Schedule State Names**, as required.
   c. Click **Next**.
7. On the **Data** screen, select the team(s) for which to generate the report.
   You can expand business units to display their sites and teams.
8. Click **Finish**.
   The report appears in the Report Viewer.

The report is sorted in alphabetical order by business unit, site name within each business unit, and team name.

Understanding the Team Weekly Schedule Report

Site [header]	The site's name and time zone.
Team [header]	The team covered by the report.
Date Period [header]	The date range that you selected in the Reports Wizard.
Activity	Each activity performed by agents on the selected team. The report is organized by activity name.
Agent	Each agent scheduled to work on the indicated

	activity.
ID	Each agent's identification number.
Day	Each day of the week.
Weekly Work Hours–Paid	The number of paid hours per week for each agent.
Weekly Work Hours–Eff.	The number of effective hours per week for each agent. (Excludes paid breaks and paid days off.)
Weekly Work Hours–NonEff.	The number of noneffective hours per week for each agent. (Paid non-working hours, such as paid breaks and paid days off.)
Total Hours	The total number of paid hours worked by the entire team if it had agents scheduled to work at the activity during the day (for the daily total) and the week (for the weekly total).
Footnote	Indicates that the agent worked on a different activity during the specified time. The footnote appears in a format similar to this: **( ) - Agent Works on the other Activity**, indicating that the "different" activity these agents are working on is enclosed in brackets in the report.

Presentation

The information in the finished report is grouped under the following headings:
Enterprise
Business Unit
Site
Week date range
Team
Activity
Agent

Weekly Schedule Coverage Report

To create a Weekly Schedule Coverage Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Weekly Schedule Coverage** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Date Range** screen:
   a. Select a Start Date and an End Date in the **Data Range** pane.
   b. Select **Show Required Staffing** or **Calculated Staffing** in the **Options** pane.
   c. Select one: **Activity**, **Site**, **Multi-site Activity**, or **Business Unit** from the drop-down list in the **Target** pane.
   d. Click **Next**.
7. Display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the Staffing Display from FTE to Man Hours.
8. On the **Data** screen, select the targets to include in the report.
   This page's tree displays activities, sites, multi-site activities, or business units (depending on your selection on the Target screen). If you selected a target other than business unit, the tree's business units expand to display their contents. You can make multiple selections.
9. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Weekly Schedule Coverage Report

Site [header]	The name and time zone of the business unit or site.
Activity or Site [header]	The name of the activity or site whose information appears in the table.

Date Period [header]	The total date range covered by the report.
Timestep	The data is displayed timestep-by-timestep.
Days	Columns for each day of the week.
Calculated/Required	The calculated or required staffing per timestep. (These columns appear if you selected **Show Required Staffing** and/or **Calculated Staffing** in the Reports Wizard.)
Scheduled	The effective number of agents that are scheduled for this activity for this timestep.
Difference	The difference between the calculated/required and scheduled staffing.
Total Hours [row]	The total full-time-equivalent person-hours for each day.

Tip

When the forecast for an Activity is absent, the default value for paid hours per day (a parameter used for FTE calculations) is 1 hour.

Scheduled Budget Report

To create a Scheduled Budget Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Scheduled Budget Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Date Range** screen, select a Start and End Date. Then click **Next**.
7. On the **Data** screen, select the team(s) for which to generate the report.
   You can expand business units to display their sites and teams.
8. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Scheduled Budget Report

Site [header]	The site's name.
Team [header]	The report is organized team-by-team.
Date Period [header]	The total time period covered by the report.
Day [headers]	For each team, the report displays budget information day-by-day.
Agent	The name of each agent on the team.
Regular Budget	The agent's pay for regular work hours on the given day, based on the agent's hourly wage.
Overtime Budget	The agent's pay for overtime work hours on the given day, based on the agent's hourly wage.
Total Budget	The agent's total pay for the given day.
Number of Agents	Number of agents on the team.
Total Per Day [row]	The entire team's total regular, overtime, and total budgets for the given day.
Total for Team [row]	The team's total regular, overtime, and total

	budgets for the whole selected date range.

Agent Comments Report

Tip

This report presents information only for agents and days that have comments entered. The report is not generated if there are no agent comments in the schedule on the specified dates.

To create an Agent Comments Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Agent Comments Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box. Then (whether you entered a header or not) click **Next**.
4. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
5. On the **Date Range** screen, select a Start and End Date. Then click **Next**.
6. On the **Data** screen, select the agents that you want to include in the report.
   You can expand business units to display their sites, teams, and agents. You can select multiple agents across teams and sites. You can also select whole teams or sites.
7. Click **Finish**. The report appears in the Report Viewer.

Understanding the Agent Comments Report

Site [header]	The name of the site.
Team [header]	Agent information is displayed team-by-team.
Date Period [header]	The total date range covered by the report.
Day [header]	The date to which each group of comments applies.
Agent	The name of each agent.
Comments	Any comments about the agent entered in the **Daily Schedule** window.

Schedule Validation Report

To create a Schedule Validation Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule Validation Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule.
6. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Schedule Validation Report

This report provides a printable, searchable format in which to view generated Schedule Validation warnings. You can browse the same warnings in the **Review Messages** window.

For more information about these warnings, see Schedule Validation.

Schedule Trade Report

To create a Schedule Trade Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule Trade Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Date Range** screen, select a Start and End Date.
6. In the **Data Type** section, select each trade status that you want to include in the report. Clear the check boxes for each status that you want to omit. Then click **Next**.
7. In the **Sort Options** screen, select one of two ways to sort the report data, **by Agent name** or **by Date**.
8. On the **Data** screen, select the agents that you want to include in the report.
   You can expand business units expand to display their sites, teams, and agents. You can select multiple agents across teams. You can also select whole teams or a whole site.
9. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Schedule Trade Report

Site [header]	The site's name and time zone.
Date Period [header]	The date range that you selected in the Reports Wizard.
Proposer: Team, Name	The team and name of the agent proposing each trade.
Respondent: Team, Name	The team and name of the agent responding to each trade proposal.
Trade: Days	The dates included in each trade proposal.
Status	The status of each trade proposal. (If you cleared a status on the Reports Wizard's **Schedule Trade States** screen, trades with that status do not appear in the report.)
Transaction Date	The date on which the trade proposal entered its current status.

Approved By / Declined By	The supervisor who approved or declined the trade proposal, or "Auto-Approved" / "Auto-Declined" if it was done by the system.
Comments	Any comments attached by the supervisor who acted on the trade proposal.

Schedule Summary Report

To create a Schedule Summary Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule Summary Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenarios** page, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Date Range** page:
   a. Select the radio button for the granularity you want.
      If you select **Intraday**, the report shows the data for one 24-hour period in timesteps. Use the drop-down box to specify timestep granularity: **15** (default), **30**, or **60** minutes.
   b. If you selected **[X]-weeks** granularity, next select the number of weeks to include. You can generate the report for any number of weeks between one and six. This option is unavailable if you selected any granularity other than weeks.
   c. Enter the date range you want displayed in the report. If you have selected to generate the report for a schedule scenario, the dates must fall within the scenario period.
   d. Select the Target type—activity, multi-site activity, activity group, site, business unit—for which you want the report generated. If you select multi-site activity or business unit, the following check box appears: **Use Multi-site Activities**. Leave checked to aggregate report data by multi-site activities.
   e. Click **Next**.
7. Display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the Staffing Display from FTE to Man Hours.
8. On the **Data** page, select the specific objects that you want to view. Depending on your choice of object type, you can choose to view the enterprise, business units, sites, or activities. Not all options are available for all object types.
   If you select **Activity**, the tree contains the enterprise, business units (if applicable), activity groups (if applicable), sites, and activities. If you select **Site**, the tree contains the enterprise, business units (if applicable), activity groups (if applicable), and sites. If you select **Business Unit**, the tree contains the enterprise and business units. You can generate the report for only the enterprise, one business unit, one site, or one activity.
9. On the **Statistics** page, select the statistics that you want to include in the report by clicking the check

box next to each statistic. You can select up to 18 items from the list. For descriptions of these statistics, see WFM Metrics in the *Workforce Management Administrator's Guide*.
The list of statistics includes these categories:

- Headcount
- Service Level
- Interaction Volume
- AHT
- Budget
- Staffing
- Difference
- Coverage
- ASA
- Occupancy

For each category, there is one or more of these metrics:

- Sch. (Scheduled)
- Frc. (Forecast)
- Diff. (Difference)
- Calc. (Calculated)
- Req. (Required)
- Publ. (Published)

If Master was selected on the **Scenario** screen, the check boxes **Coverage Publ.** and **Coverage Diff.** are enabled and selected by default. This latter column displays the difference between schedule coverage based on the current Master Schedule and schedule coverage based on the baseline Master Schedule.

10. Click **Finish**.
The report appears in the Report Viewer.

Understanding the Schedule Summary Report

Site Information or Business Unit Information or Enterprise [header]	The site's name and time zone, if you selected activity as the report's target. The business unit's name and time zone, if you selected multi-site activity or site as the report's target. The enterprise, if you selected business unit as the report's target. (Each root is displayed separately.)
Activity, Multi-Site Activity, Site, or Business Unit [header]	The report is organized by activity, multi-site activity, site, or business unit— depending on the target that you selected in the Reports Wizard.
Date/Date Period [header]	The dates covered by the report. The report displays

	separate information for each target and date. This header shows the Date if you selected Intra-day granularity and Date Period for other granularities.
Time Step, Day, Week Of, X Weeks of, Month	The time period shown. The header and the column contents depend on the granularity that you selected.
Coverage [Scheduled]	The scheduled staffing coverage.
Headcount [Scheduled]	The number of agents scheduled.
Service Level Percentage Scheduled	The service level percentage that can be achieved given the staffing coverage, assuming that other planned metrics (such as interaction volumes and Average Handling Time) remain unchanged.
Service Level Percentage Forecasted	The service level percentage that can be expected to be achieved based on the number of agents forecasted. This may differ from the original service level objective that was stated when the staffing forecast was built due to agent rounding. For example, WFM may forecast a staffing requirement of 12 agents to meet a service level objective of 80% of interactions answered within 20 seconds, but Service Level Percentage Forecast may report a higher number, such as 83.48%. This is because 12 was the minimum number of agents required to meet the 80% service level objective but, with that number of agents, the contact center can be expected to achieve a slightly better service level than 80%. With one less agent (11 agents), the contact center would not be expected to achieve the 80% service level.
Deferred Service Level Percentage Scheduled	The deferred service level percentage that can be achieved given the staffing coverage, assuming that other planned metrics (such as interaction volumes and Average Handling Time) remain unchanged.
Deferred Service Level Percentage Forecasted	The deferred service level percentage that can be expected to be achieved based on the number of agents forecasted.
Interaction Volume Scheduled	The number of interactions that can be handled based on the schedule coverage.
Interaction Volume Forecasted	The expected number of interactions, according to the Master Forecast—assuming that other planned metrics remain unchanged.
AHT Scheduled	The Average Handling Time per interaction, based on the schedule—assuming that other planned metrics remain unchanged.
AHT Forecasted	The expected Average Handling Time, according to the Master Forecast.
Budget Scheduled	The budget for the scheduled coverage for the selected day and target, based on the scheduled agents' paid hours and wages.
Budget Forecasted	The budget for the calculated staffing for the selected day and target, based on the full-time-equivalent (FTE) paid hours per day and salary specified in the scenario.
Staffing Calculated	The required number of agents as calculated by WFM, based on the forecasted interaction volumes, AHT, and applicable service objectives.

Staffing Required	The required number of agents defined by the user, either by explicitly entering forecast targets or by using a template.
Difference Calculated	The difference between Coverage [Scheduled] and Staffing Calculated.
Difference Required	The difference between Coverage [Scheduled] and Staffing Required.
Coverage Publ.	The published staffing coverage.
Coverage Diff.	The difference between schedule coverage based on the current Master Schedule and schedule coverage based on the baseline Master Schedule.

Schedule Marked Time Report

To create a Schedule Marked Time Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule Marked Time Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenarios** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Date Range** screen:
   a. In the **Date Range** section, select Start and End dates for the report. If you selected a scenario on the previous screen, you cannot select dates outside the scenario date range.
   b. In the **Time Range** section, select Start and End times and check **Next Day** for End time, if required.
   c. In the **Options** section, check the **Show filter on first page of report only** check box, if required. Then click **Next**.
7. On the first **Data** screen, in the **Options** section, select the enterprise or business units, sites, teams, or agents you want to see in the report.
   You can expand business units to display the sites and expand the sites to view the teams and agents. You can select any combination of teams and/or agents from multiple sites.
8. Click **Next**.
9. On the second **Data** screen, select the marked-time types that you want to be displayed. Marked-time types are listed under the sites for which they are configured.
10. Click **Finish**.

The report appears in the Report Viewer.

Understanding the Schedule Marked Time Report

Site [header]	The site's name and time zone.
Team [header]	Agents are displayed by team.
Date and Time Period [header]	The dates covered by the report, and the time

	period covered each day.
Agent	The agent whose information is displayed.
Date	The date on which the marked time occurs.
Marked Time	The name of the marked-time type.
Start Time	The marked time's start time.
End Time	The marked time's end time.
Duration	The duration of each marked-time period.
Paid Hours	The number of paid hours covered by the marked-time period.
Total Duration and Total Paid Hours for Team	The total number of marked-time hours and the total paid marked-time hours for the team during the selected report period.

Schedule Marked Time Totals Report

To create a Schedule Marked Time Totals Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule Marked Time Totals Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
   Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
6. On the **Date Range** screen:
   a. Select a granularity and a corresponding start and end date. (Your granularity selection may restrict your date selections.)
   b. On the **Target** pane, select **Agent**, **Team**, or **Site** from the drop-down list.
   c. In the **Options** section, check the **Show filter on first page of report only** check box, if required. Then, click **Next**.
7. On the first **Data** screen, select the targets (agents, teams, or sites) that you want to include in the report. Then click **Next**.
   You can expand business units to display their sites. If you selected **Team** or **Agent** on the **Target** pane, you can further expand the tree's branches. You can select across multiple sites.
8. On the second **Data** screen, select the marked-time types to include. Then click **Finish**.
   You can expand business units to display their sites, and expand sites to display their marked-time types. You can select multiple marked-time types across different sites.

The report appears in the Report Viewer.

Understanding the Schedule Marked Time Totals Report

The report takes one of three forms, depending on the target that you selected.

The Site Schedule Marked Time Totals Report

Enterprise [header]	The name and time zone of the enterprise in which this site is included.

Business Unit [header]	The name of the business unit, if any, to which the selected site belongs. If the report covers independent sites, no business unit name appears.
Date Period [header]	The time range covered by the report.
Selected Schedule Marked Times [header]	The marked time types covered by the report.
Site	The name of each site included in the report.
Day	Each date in the selected date range.
Duration	The time that this site's agents spent in the selected marked-time types for each day included in the report.
Paid Hours	The number of the marked-time hours that were paid.
Total Duration and Total Paid Hours for Business Unit	The combined time that all the sites spent in the selected marked-time types over the report's date range and the number of those hours that were paid.

The Team Schedule Marked Time Totals Report

Business Unit [header]	The name of the business unit. If the report covers only independent sites, no business unit name appears.
Site [header]	The name and time zone of the site.
Date Period [header]	The time range covered by the report.
Selected Schedule Marked Times [header]	The marked-time types covered by the report.
Team	The name of each team included in the report.
Day	Each matching date in the selected date range.
Duration	The time that each team spent the selected marked-time types during each day included in the report.
Paid Hours	The number of hours spent in the marked-time types that were paid.
Total Duration and Total Paid Hours for Site	The combined time that all of the teams in the site spent in the selected marked-time types during the report's date range.

The Agent Schedule Marked Time Totals Report

Site [header]	The name and time zone of each site included in the report.
Team [header]	The team to which the selected agents belong.
Date Period [header]	The time range covered by the report.
Selected Schedule Marked Times [header]	The marked-time types covered by the report.
Agent	The name of each agent in the team who had marked time.

Day	Each matching date in the selected date range.
Duration	The time that this team's agents spent in the selected marked-time types for each day included in the report.
Paid Hours	The number of marked-time hours that were paid for each day included in the report.
Total Duration and Paid Time for Team	The combined time that all of the team's agents spent in the selected marked time over the report's date range, and how many of those hours were paid.

Schedule Bidding Report

Important

- You can generate this report only if you have the Schedule Bidding Report security right (which is granted by default). See the Configuration > Roles topics for more information about security privileges.
- The scenario that will provide data for the report must have real agents assigned to all profiles.
- The report displays only bidding candidates, not all Agents and Teams.

To create a Bidding Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule Bidding Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. On the **Header** page, you have two optional choices:
   - To print a header on the report, select **Show Header** and type your header text into the text box.
   - To output the report in .csv format, select **Create report with .csv friendly format**.

   Click **Next**.
4. On the **Scenarios** page, select the appropriate schedule scenario and click **Next**.
5. On the **Data** page, select the appropriate Agents or Teams and click **Next**.
6. On the **Date Range** page, select one of three Data Types To Show:
   - **Shift Start/End Time**
   - **Total Paid Hours**
   - **Shift or Schedule State Names**

   Select one of two **Sort Options**: **By Agent Name** or **by Agent's Position**.
7. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Bidding Report

Site [header]	The site name and time zone.
Date Range [header]	The dates covered by the report, and time period covered each day.

Ranking System [header]	The type of ranking system used to auto-assign the shifts.
Agent	The agent whose information is displayed.
Team	The name of the Agent's team.
Position	The agent’s position in the site, based on the selected ranking system. The ranking system can be an agent’s rank or seniority or combination of rank and seniority. The higher ranked or more senior (by hiring date) agents get the top positions. The position is always calculated based on all available site agents and is not dependent on the pool of agents in the particular bidding process.
Week	The week that is being documented in the same row.
Bid	Agent’s original bid number for assigned schedule. Unwanted bids appear in brackets [2]. No value is display if the agent did not bid.
Days of the Week	Each column (**Sun**, **Mon**, **Tue**, **Wed**, **Thu**, **Fri**, **Sat**) displays data of the type specified in **Data Type To Show**.
Paid Hours	The Total of paid hours for the week.

Adherence Reports

Adherence reports display adherence statistics at the business unit, site, team, or agent level. If agents in your site perform work on multiple media channels, you can run adherence reports that also contain adherence statistics per channel. (For a complete list of all WFM reports, see the Reports List.)

The Adherence reports are:

- Agent Adherence Report.
- Adherence Totals Report.
- Agent States Report.

Report Security Restrictions

You can view and print reports only for those sites for which you have security access. To create a report, click that report's link (above) and follow the steps.

Date Restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.
- If you select intra-day granularity, the **End Date** selector is disabled.

Historical Multi-Channel Adherence Data in Reports

The Agent Adherence and Agent States reports contain historical multi-channel data. These WFM reports include aggregated agent state and channel state data in the same level. If there is no scheduled state to be mapped to a schedule state group that does not have a specified channel during a particular time interval, the aggregated agent state is omitted from the returned data for that interval and WFM returns only channel data. As part of the record corresponding to the aggregated status, WFM returns only schedule states that map to schedule state groups that do not have a specified channel. WFM omits the channel data when the channel does not have a real-time state and there are no schedule states to be mapped to the schedule state group for that channel.

WFM returns data with one minute granularity, which is the same granularity real-time data is stored in the database. One record represents data for a single channel or agent-aggregated level data. The record also contains the start/end date and time, and a list of schedule states. In this way, it is possible to have multiple events for the same time period. However, these events are not double counted for report totals.

For more information about the how historical multi-channel adherence data is displayed, see the section Channel Sub Reports in Agent Adherence Report and Agent States Report.

Agent Adherence Report

To create an Agent Adherence Report:

1. On the **Reports** tab, select **Adherence Reports** from the Views menu.
2. Select **Agent Adherence Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
4. Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
5. Click **Next**.
6. On the **Date Range** screen, select a Start date and End date for the report.
7. Optionally, you can select the **Display Every Unique Status** check box. Select this option if you want to see every nonadherent status that the agent was in during periods of nonadherence. If you leave this check box cleared, the report shows only the first of the consecutive nonadherent statuses that occurred during each schedule state.
8. Optionally, you can also check the **Exclude Days Without Shifts** check box. In this case, scheduled days without shifts are not included in the report.
9. Click **Next**.
10. On the **Data** screen, select the agent(s) to include in the report.
11. You can expand business units to display their sites, teams, and agents.
12. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Agent Adherence Report

Site [header]	The site's name and time zone.
Team [header]	The name of the selected agent's team.
Agent [header]	The name of the agent whose information is displayed in the report.
Date Period	The time range covered by the report. Adherence data is shown for each day separately.
Scheduled State	Lists the agent's noncompliant scheduled states.
Agent State	The noncompliant states registered for the agent throughout the day.
Start Time/End Time	The start and end times for the noncompliant

	states.
% Adherence Per Day	The percent of the day during which the agent was adherent to his or her scheduled state. This is calculated using the formula 100 - ((NC+UNC)∗100/(ST+UNC)) where: • **NC**—Noncompliant time • **UNC**—Noncompliant time outside of scheduled time • **ST**—Scheduled time
% Adherence for Agent	The percent of the report's total time range during which the agent was adherent to his or her scheduled state.

Channels Sub Report

The Agent Adherence report has a Channels sub report that provides separate data for each media channel and aggregated real-time state information for those schedule state groups with no specified channel. The data in each record of the report is aggregated and contains the following columns:

- **Channel**—The name of the channel.
- **Agent State**—Real-time state of the agent on that specific channel.

The order and format of these columns is as shown in the example below.

Agent Adherence Report

Site [redacted]

Time zone ECT

Team [redacted]

Agent **Lund , Krist**

Date Period: 4/1/10 - 4/30/10

4/12/10

Start Time	End Time	Schedule State	Agent State
8:56 AM	9:00 AM	No Activity	AfterCallWork
		Voice	AfterCallWork
		Email	AfterCallWork
9:00 AM	9:09 AM	Telefon	CallInbound
		Voice	CallInbound
		Email	LoggedOut

Adherence Totals Report

To create an Adherence Totals Report:

1. On the **Reports** tab, select **Adherence Reports** from the Views menu.
2. Select **Adherence Totals Report** from the list in the Objects pane.
   The Reports Wizard's first screen, Header, appears.
3. Optional: Generate a header on the report, by selecting **Show Header** and typing the header text into the text box.
4. Optional: Export the report to a file in the comma-separated values format, by selecting the check box **Create report with .csv friendly format**.
   - After the report is created, select **Actions** > **Save As** and then, **Comma Separated** as the report format.

   Do not use Workforce Management (WFM) to print reports that you created in ".csv friendly format," because the result may be truncated. To print such a file correctly, open it in a program that reads the .csv format, and then print it.
5. Click **Next**.
6. On the **Date Range** screen, select a Granularity and a corresponding Start Date and End Date.
   Your Granularity selection may restrict your Date selections.
7. Click **Next**.
8. In the **Target** section, select **Agent**, **Team**, or **Site** from the drop-down list.
9. Optional: Select the **Exclude Days Without Shifts** check box and then, click **Next**.
10. On the **Data** screen, select the targets (agents, teams, or sites) that you want to include in the report.
    You can expand business units to display their sites. If you selected Team or Agent on the Target screen, you can further expand the tree's branches. You can select across multiple sites.
11. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Adherence Totals Report

The report takes one of three forms depending on the target selected. The Site, Team, and Agent reports are detailed separately below.

The Site Adherence Totals Report

Business Unit [header]	The name of the business unit, if applicable, and its time zone.
Date Period [header]	The time range covered by the report.

Site	The name of each site included in the report.
Total Time	The combined total of the duration of the shift in the Master Schedule plus the non adherent time outside the shift for agents in each site.
Duration of Non Adherence	The length of time agents in each site were non adherent (within the shift and outside of the shift).
Duration of Non Adherence Out of Schedule	The length of time agents in each site were non adherent outside of the shift. This number makes up part of the Total Time and Duration of Non Adherence.
% of Adherence	The percentage of time that the agents in each site spent in a compliant state for each day included in the report.
% of Adherence per Day	The average of the compliant time for all sites for the specified day.
% Adherence per Week	The average of the compliant time for all sites for the specified week.
% Adherence per X Weeks	The average of the compliant time for all sites, for your specified period of up to six weeks.
% Adherence per Month	The average of the compliant time for all sites for the specified month.
% of Adherence for the Business Unit	The total average compliant time for all sites for the specified date range.

The Team Adherence Totals Report

Business Unit [header]	The name of the business unit, if applicable, and its time zone.
Site [header]	The name and time zone of the site.
Date Period [header]	The time range covered by the report.
Team	The name of each team included in the report.
Total Time	The combined total of the duration of the shift in the Master Schedule plus the non adherent time outside the shift for agents in each team.
Duration of Non Adherence	The length of time agents in each team were non adherent (within the shift and outside of the shift).
Duration of Non Adherence Out of Schedule	The length of time agents in each team were non adherent outside of the shift. This number makes up part of the Total Time and Duration of Non Adherence.
% of Adherence	The percentage of time that agents in each team spent in a compliant state for each day included in the report.
% of Adherence per Day	The average of the compliant time for all teams on the specified day.
% Adherence per Week	The average of the compliant time for all teams for the specified week.

% Adherence per X Weeks **% Adherence per Month**	The average of the compliant time for all teams, for a specified period of up to six weeks. The average of the compliant time for all teams, for the specified month.
% of Adherence for Site	An average of all daily adherence totals for the date period.

The Agent Adherence Totals Report

Site [header]	The name and time zone of the site.
Team [header]	The team displayed in the report.
Date Period [header]	The time range covered by the report. Each day is shown separately.
Agent	The name of each agent included in the selected team.
Total Time	The combined total of the duration of the shift in the Master Schedule plus the non adherent time outside the shift for each agent.
Duration of Non Adherence	The length of time each agent was non adherent (within the shift and outside of the shift).
Duration of Non Adherence Out of Schedule	The length of time each agent was non adherent outside of the shift. This number makes up part of the Total Time and Duration of Non Adherence.
% of Adherence	The percentage of time that each team spent in a compliant state for each day included in the report.
% of Adherence	The percentage of time that each agent spent in a compliant state for each day included in the report.
% of Adherence per Day	The average of the compliant time for all agents on the specified day.
% Adherence per Week **% Adherence per X Weeks** **% Adherence per Month**	The average of the compliant time for all agents for the specified week. The average of the compliant time for all agents, for a specified period of up to six weeks. The average of the compliant time for all agents, for the specified month.
% of Adherence for Team	An average of all daily adherence totals for the date period.

Agent States Report

To create an Agent States Report:

1. On the **Reports** tab, select **Adherence Reports** from the Views menu.
2. Select **Agent States Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
4. Optional: To export the report to a file in the comma-separated values format, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management (WFM) to print reports that you created in ".csv friendly format," because the result may be truncated. To print such a file correctly, open it in a program that reads the .csv format, and then print it.
5. Click **Next**.
6. On the **Date Range** screen, select a Start Date and End date for the report. Then click **Next**.
7. On the **Data** screen, select the agent(s) that you want to include in the report.
   You can expand business units to display their sites, teams, and agents.
8. Click **Next**.
9. On the **Agent states** page, select the Agent States that you want to include in the report. Clear the check boxes for Agent States that you want to omit. If you want to, enter any **Reason Code** with which you want to filter the report.
10. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Agent States Report

Site [header]	The site's name and time zone.
Team [header]	The team to which the selected agent belongs.
Agent [header]	The agent whose status is displayed in the report.
Date Period	The dates that you selected in the Reports Wizard.
Agent State	The name of the schedule state.
Reason	If you are using reason [Aux] codes, the code associated with an occurrence of the schedule state.
Start Time	The time at which the agent enters the schedule state.
End Time	The time at which the agent switches to another state.
Duration	Duration of the schedule state.

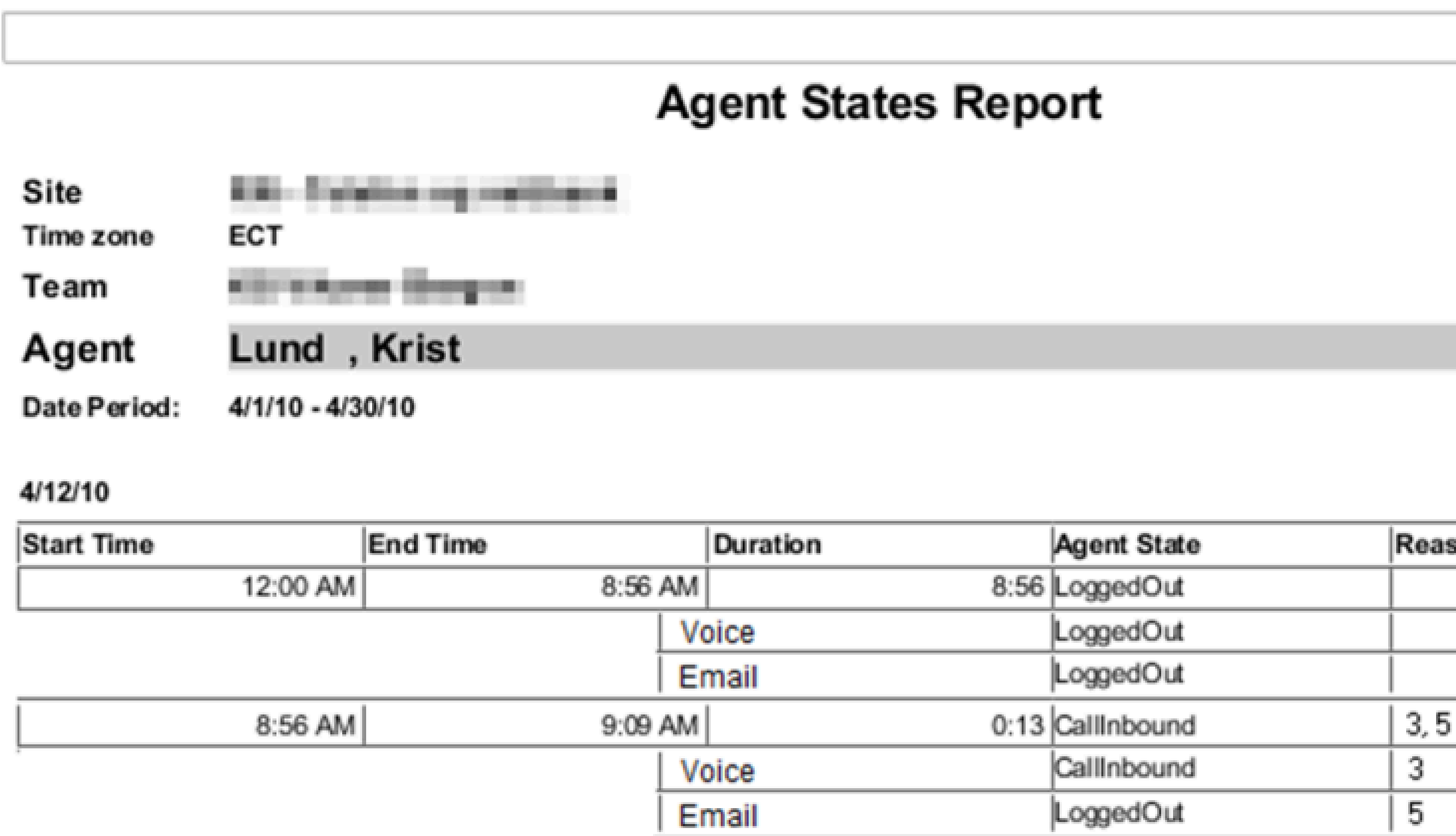
Total Duration Per Day (row)	The combined time of the schedule states per day.
Total Duration Per Date Period (row)	The combined time of the schedule states per date period.

Channels Sub Report

The Agent States report has a Channels sub report that provides separate data for each media channel and aggregated real-time state information for those schedule state groups with no specified channel. The data in each record of the report is aggregated and contains the following columns:

- **Channel**—The name of the channel.
- **Agent State**—Real-time state of the agent on that specific channel.
- **Reason**—If present, a list of reasons for a specific channel. (This column is only displayed in the Agent States report.)

The order and format of these columns is as shown in the example below.



Agent States Report

Site [redacted]
Time zone ECT
Team [redacted]
Agent Lund , Krist
Date Period: 4/1/10 - 4/30/10

4/12/10

Start Time	End Time	Duration	Agent State	Reas
12:00 AM	8:56 AM	8:56	LoggedOut	
		Voice	LoggedOut	
		Email	LoggedOut	
8:56 AM	9:09 AM	0:13	CallInbound	3, 5
		Voice	CallInbound	3
		Email	LoggedOut	5

Screenshot of the Channels sub report page in the Agent States Report.

Audit Reports

Audit reports track the actions performed by supervisors while working in the Calendar and Master Schedule.

The Audit reports are:

- Calendar Audit Report
- Schedule Audit Report
- Configuration Audit Report

To create a report, click that report's link (above) and follow the steps.

For a complete list of all WFM reports, see the Reports List.

Report Security Restrictions

In order to create and print these reports, permission must be assigned. See the Configuration > Roles topics for more information about security privileges.

Date Restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.

Calendar Audit Report

This report can show calendar items modified not only by supervisors, but also by agents. However, the items modified by agents cannot be filtered by the agent name or ID. Instead, all items modified by agents are listed as being modified by the SYSTEM user. An example would be an agent time-off preference. Since time-off preferences are calendar items that can be entered by agents through their Web GUI, this type of calendar item would show up in the Calendar Audit Report as having been modified by the SYSTEM user.

To create a Calendar Audit Report:

1. On the **Reports** tab, select **Audit Reports** from the Views menu.
2. Select **Calendar Audit Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box. Then (whether you entered a header or not) click **Next**.
4. Complete the **Date Range** screen.
   a. Under **Action Date Range**, do one of the following:
      - Select Start and End dates for supervisor actions in the **Calendar** module.
      - Select the **Any** check box to select any date range for supervisor actions in the **Calendar** module. If checked, the Start and End date fields are disabled.

   b. Under **Actions and Statuses**, check boxes to indicate the actions and statuses that you wish to audit:
      - **Insert**
      - **Edit**
      - **Delete**
      - **Preferred**
      - **Granted**
      - **Declined**
      - **Recalled**

   c. Under **Calendar Items Date Range**, do one of the following:
   d. Select Start and End dates for the agent calendar items you wish to audit.
   e. Select the **Any** check box to select calendar items in any date range. If checked, the Start and End date fields are disabled.
5. Under **Options**, select **Show comments/memo** to control whether comments or memo, if any, are shown on the report.
6. Under **Sort Options**, select one of the following:
   - **By Agent name**

    - **By Supervisor name**
    - **By Timestamp date**
    - **By Calendar Item date**

- Click **Next**.
- On the **Data** screen, under **Available Users**, select the supervisors and other users/agents that you want to include in your report.
- Click **Next**.
- On the second **Data** screen, under **Available Agents**, select the agents to include in the report.
  You can expand business units to display their sites, teams, and agents. You can select agents from multiple sites.
- Click **Next**.
  On the **Calendar Items** screen, select the check boxes for items that you want to include in the report, and clear the check boxes for items that you want to omit. Available selections are:
    - **Availabilities**
    - **Days Off**
    - **Shifts**
    - **Working Hours**
    - **Times Off**
    - **Exceptions**
- Click **Finish**.

  The report appears in the Report Viewer. The report is initially sorted by business unit within the enterprise, by site name within each business unit, then team name (if any) within each site. Further sorting is based on **Sort Options** selected on the **Date Range** screen.

Understanding the Calendar Audit Report

Site [header]	The selected business unit, site, site time zone, and the (first) selected team.
User Name	The name of the user (supervisor) or agent responsible for the action.
Timestamp	The date and time of the supervisor action.
Action	The description of the action. Examples: Insert, Edit, and Delete.
Date	The calendar item day.
Agent	The name of the agent affected by the action.
Type	The item type name. Example: Working Hours.
Name	The calendar item name.
Status	The status assigned by the user. Examples: Granted, Declined.

Comments/Memo	This column appears if **Show Comments** was selected on the **Date Range** screen.

Schedule Audit Report

This report can show not only schedule changes made by supervisors, but also by agents. However, the schedules modified by agents cannot be filtered by the agent name or ID. Instead, all schedules modified by agents are listed as being modified by the SYSTEM user. An example would be an agent trade that is auto-approved by the system. In this case, no supervisor was involved, and that schedule change would be reported in the Schedule Audit Report as being done by the SYSTEM user.

To create a Schedule Audit Report:

1. On the **Reports** tab, select **Audit Reports** from the Views menu.
2. Select **Schedule Audit Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box. Then (whether you entered a header or not) click **Next**.
4. Complete the **Date Range** page.
   a. Under **Action Date Range**, do one of the following:
      - Select Start and End dates for supervisor actions in the Master Schedule.
      - Select the **Any** check box to select any date range for supervisor actions in the Master Schedule. If checked, the Start and End date fields are disabled.

   b. Under **Actions**, check boxes to indicate the actions that you wish to audit:
      - **Publish**
      - **Cleanup**
      - **Modify**
      - **Trade**
      - **Rollback**

   c. Under **Schedule Date Range**, do one of the following:
      - Select Start and End dates for the schedule days you wish to audit.
      - Select the **Any** check box to select schedule days in any date range. If checked, the Start and End date fields are disabled.

   d. Under **Options**, select **Present action's details** to control whether additional detail on the action is shown on the report. See Understanding the Schedule Audit Report below for more information.
   e. Under **Sort Options**, select one of the following:
      - **By Supervisor name**
      - **By Timestamp date**
      - **By Schedule date**
5. Click **Next**.
6. On the **Data** screen, under **Available Users**, select the supervisors and other users/agents that you

want to include in your report.

7. Click **Next**.
8. On the second **Data** screen, under **Available Agents**, select the agents to include in the report. You can expand business units to display their sites, teams, and agents. You can select agents from multiple sites.
9. Click **Finish**.

The report appears in the Report Viewer. The report is initially sorted by business unit within the enterprise, by site name within each business unit, then team name (if any) within each site. Further sorting is based on **Sort Options** selected on the **Date Range** screen.

Understanding the Schedule Audit Report

Site [header]	The selected business unit, site, and site time zone.
Date Period	The selection made by the user for **Action Date Range** on the **Date Range** page of the report generation wizard.
User Name	The name of the user (supervisor) or agent responsible for the action.
Timestamp	The date and time of the supervisor action.
Action	The description of the action. Examples: Publish, Cleanup, Modify.
Date Range	If the Action is **Publish** or **Cleanup**, this column shows the date range for the action. If the Action is **Modify**, this column shows the date of the modified schedule day.
Applied to	If the Action is **Publish**, this column shows the name of the scenario used for the published data. If the Action is **Modify**, this column shows the name of the agent associated with the schedule modification. If the Action is **Cleanup**, this column is empty. Tip If you selected **Present action's details** on the **Data Range** screen, the following applies: If the Action is **Publish** or **Cleanup**, the report lists all affected agents.

If the schedule was changed and you checked **Present Action's Details** on the **Date Range** page, the report displays two tables at the bottom:

- Left-hand table: Original schedule
- Right-hand table: Modified schedule.

The left-hand table contains these columns:

- **Original Schedule**
- **Start Time**
- **End Time**
- **Paid Time**
- **Applied To**

The right-hand table contains these columns:

- **Modified Schedule**
- **Start Time**
- **End Time**
- **Paid Time**
- **Applied To**

Configuration Audit Report

This report can show configuration object (data) types that have been associated with specific sites and users, including the SYSTEM user.

To create a Configuration Audit Report:

1. On the **Reports** tab, select **Audit Reports** from the Views menu.
2. Select **Configuration Audit Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box. Then (whether you entered a header or not), click **Next**.
4. Complete the **Date Range** screen.
   a. Under **Action Date Range**, do one of the following:
      - Select Start and End dates for supervisor actions with configuration objects.
      - Select the **Any** check box to select any date range for supervisor actions with configuration objects. If checked, the Start and End date fields are disabled.

   b. Under **Actions**, select the check boxes which indicate actions that you wish to audit: **Insert**, **Modify**, **Delete**.
   c. Under **Sort Options**, select one of the following from the drop-down menu:
      - **By Object's type**
      - **By Supervisor name**
      - **By Timestamp date**.
5. Click **Next**.
6. On the **Configuration Object Types** screen, under **Data Types**, select the check boxes for data types that you want to include in the report, and clear the check boxes for items that you want to omit.
7. Click **Next**.
8. On the **Data Page**, under **Available Users**, select the supervisors and other users (including agents, if shared transport groups are enabled) that you want to include in your report.
9. Click **Next**.
10. On the second **Data Page**, under **Available Sites**, select the sites to include in the report.
    You can expand business units to display their sites. You can select multiple sites.
11. Click **Finish**.

The report appears in the Report Viewer. The report is initially sorted by business unit within the enterprise, by site name within each business unit. Further sorting is based on **Sort Options** selected on the **Date Range** screen.

Understanding the Configuration Audit Report

Header	The selected business unit, site, and date period.
User Name	The name of the user (supervisor) or agent responsible for the action.
Action	The description of the action. Examples: Insert, Edit, and Delete.
Object Type	The object that is being reported (Example: Time-Off Type)
Object Name	The reported object’s name (Example: Time Off 1)
Timestamp	The date and time of the supervisor action.
Field	Data field inside the object.
Old Value	The object's previous value (if there was one).
New Value	The object's updated value.