# Workforce Management Administrator's Guide

## WFM Policy Objects

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# WFM Policy Objects

Contractual obligations, legal requirements, and business practices comprise constraints under which a contact center operates. Workforce Management (WFM) enables you to use Policy objects to specify constraints in great detail, resulting in forecasts and schedules that comply with constraints while optimizing staffing levels.

## 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. You can configure exceptions to be considered when the Meeting Planner is in use, to be convertible to a day off, and so on. You can assign agents to multiple partial-day exceptions if the exceptions do not overlap.

Because you can group agents into teams, you can assign exceptions to large groups of agents at one time.

### Important
Genesys recommends that you make use of the time off capabilities introduced in 8.x releases, rather than configuring time off using exception types.

### Payback Exceptions

Payback exceptions are unpaid part-day work intervals that are inserted into schedules to make up for missed time due to lateness or personal appointments. Supervisors and agents can insert these exceptions and specify payback options to recoup missed time.

Payback exceptions might not be applicable or required in all sites, business units, or contact centers. To enable this functionality, administrators must ensure the InsertPaybackException configuration option in WFM Web Application's **[Functionality]** section is set to $true$ (default).

For information about how supervisors and agents can use payback exceptions, see Insert Exceptions with Payback in the *Workforce Management Web for Supervisors Help* and Inserting Payback Exceptions in the *Workforce Management Agent Help*.

### Exception Memos

You can add Exception memos in Schedules, Calendar items, and Meetings to provide comments or additional information about Exceptions types. Exception memos can contain up to 256 characters.

## Memos in Calendar Items

When you create Exception memos in Calendar items, they are visible in the Schedule views after they are scheduled, and preserved if transferred between Schedule scenarios, from Scenario to Master Schedule, or from Master to Schedule Scenario. If you edit the memo in the Calendar, the schedule reflects the change without having to be rebuilt or republished. If this same memo is in the schedule (rather than in Calendar items), it is not saved in the Calendar. Instead, WFM creates a new memo that is related to this scheduled Exception. This newly-created memo is not related to the Calendar item. Therefore, changing the original memo in the Calendar item does not affect this instance of the scheduled Exception—it is a separate memo.

> ### Tip
>
> You can create an Exception memo in the schedule, even if you have created an Exception without a memo in Calendar items. Again, the scheduled Exception memo is not synchronized with the Calendar item Exception and will not reflect any modifications made to Exception memo in the schedule. See Memos in Schedule Views.

If you delete an Exception and its memo in the Calendar, it will no longer be visible in the schedule. However, you can enter a new memo for the Exception that is not related to the Calendar item. If there are multiple instances of an Exception in multiple scenarios and/or the Master Schedule and you delete the related Calendar item, all instances become separate Exceptions.

When you change a memo in a scheduled Exception the change is reflected in the schedule audit and history. If the settings for the Exception type allow, scheduled Exception memos are swapped and traded with Exceptions. If a calendar-related memo is swapped or traded, WFM copies it to the schedule and disassociated it from the calendar.

Exception memos are displayed:

- In the **Details** bar at the bottom of the **Schedule Intra-Day** and **Agent-Extended** views.
- Next to the scheduled **Exception Type Name** in the **Individual Schedule** and **Team Schedule** reports.
- In the schedule details (and printed schedule details) for the Web for Agents > **My Schedule** view, in a manner similar to the reports.

## Memos in Schedule Views

While creating new Exceptions in the Schedule Scenario or Master Schedule that are not associated with a Calendar item, you can also add and edit an Exception memo. You can edit Exception memos that have been inserted directly into the schedule and initially created without memos or those that became schedule-only Exceptions after the related Calendar item was deleted. (See Memos in Calendar Items.) However, each Exception is edited separately, even if they were inserted using the **Insert Multiple** wizard.

> **Important**
>
> Due to the size limitations for an entire scheduling day, the memo might not fit into the schedule if there are multiple exceptions with long memos in the same agent day.

Exception memos are published or extracted to and from the Master Schedule along with Exceptions, and are transferred when you create scenarios, based on data from another scenario or data taken from the Master Schedule. They are also committed (together with Exceptions) from the agent's schedule to the the Master Schedule. However, unlike Exception memos created in Calendar items, after publishing or creating schedules, the link between Exceptions is not maintained and editing one instance of a memo does not change other instances.

After the schedules are published, the memos appear in the **Details** bar at the bottom of the Schedule > Intra-Day and Schedule > Agent Extended views. You might not see the entire memo, depending on the length of the memo or number of characters. However, when editing the memo, the entire memo text is displayed.

## Memos in Meeting Exceptions

Entering memos in Meeting Exceptions is not quite the same as adding Exception memos in the Calendar or Schedule views. In the meeting **Properties** settings, the **Meeting Name** field can include a short memo, further describing the type or purpose of the meeting. For example, exception_name, meeting_name (exception_memo). Together with the **Meeting Name** and **Exception Type** this memo is displayed in published schedules, just as exception memos are for Calendar items and Schedule views.

## Time-Off Types

Use the **Time-off Types** module to create time-off types for each type of time off that you want to be able to track.

Time-off types include vacation, personal time off, flexible time off, paid sick days, floating holidays, and more. They can be accrued (time off accumulates over time) or awarded (the total amount of time off for the year is assigned at a single time). For example, you might want personal time off to accumulate, whereas holidays—since there is a fixed number during the year—can be awarded.

You can associate multiple time-off rules with a single time-off type. This enables you to have different time-off types accumulate at different rates. For example, you can set different time-off rules for different levels of seniority.

## Time-Off Rules

The Time-Off Rules module enables you to set allocation parameters for both accrued and awarded time-off types. Constraints include the number of hours that are assigned per year or that accumulate per working period, and the carry-over date for each time-off type you use, and whether time-off requests can be auto-approved.

Each type of time off can be associated with one or more time-off rules. Because you can configure a number of time-off types (using the WFM Web's Time-Off Types module), you can have time off accumulate at different rates, providing more flexibility in managing contact-center staff.

You also use this module to assign time-off rules to specific agents. Agents can have multiple time-off rules assigned, each with its own time-off type.

### Configure Time-Off Rules

To learn how to create and configure time-off rules, see the topic Policies > "Time-Off Rules" topic in *Web for Supervisors Help*.

## Meetings

Use the *Meetings* module to create meetings and assign them to agents. You can set up a series of recurring meetings that must meet your constraints for frequency, number of occurrences, and so on.

Use the Meeting Planner in the WFM Web to configure preplanned meetings such as team meetings that recur weekly or monthly. If you need to create an ad hoc meeting, use the Meeting Scheduler within the WFM Web for Supervisors `Application`.

## Marked Time

Marked Time types are specific periods of time that you want to monitor and report on that are not already labeled using an existing category. For example, you might want to mark the periods that agents worked on a particular project. Or you can mark overtime so that you can report on it.

You can insert and view Marked Time in the **Schedule > Intra-Day** views in WFM Web for Supervisors. The Schedule Marked Time report and Schedule Marked Time Totals report provide marked time statistics.

## Shifts

The method used to create WFM shifts allows for a flexible description of shift duration and of start

and end times. Additionally, WFM schedules use flexible break and meal parameters.

In a sense, a WFM shift is an abstraction, representing countless possible working times, even though you can configure a shift to produce very regular, fixed, agent schedules.

A single WFM shift can incorporate hundreds of possible start times and duration as long as they fall within the parameters of the contract. However, through more rigid shift configuration, agent start times and workday duration can be fixed. This combination of flexibility and structure makes the WFM shift a tremendously powerful scheduling mechanism. In fact, in some cases, you can configure an entire contact center using only a few WFM shifts.

## Allocating WFM Shifts Effectively

The WFM shift contrasts sharply with the conventional notion of a shift, with fixed weekly start time, fixed duration, and set breaks. You can configure shifts to work in tandem with contracts, which efficiently and effectively controls the placement of working times.

For example, consider a contact center with a standard full-time shift of 8 hours a day, 5 days a week, and an alternative full-time shift of 10 hours a day, 4 days a week. Both types of agents can use a single shift with a flexible duration of 8–10 hours per day. In either case, the agents are contracted to receive 40 hours work each week and to work 4 or 5 days. You can configure WFM to guarantee that specific agents work 4 or 5 days a week, or you can leave it to the WFM Scheduler to determine how many agents of each full-time type should be used to provide the least costly schedule.

Such an efficient method of shift allocation allows you to take into account the effect of complex scheduling requirements and agent-centric considerations, while making the best possible use of multi-skilled agents.

If you have a need in your contact center for more precise control over when an agent works and the duration of his workday, you may consider using Rotating Patterns. This is a way to lock in specific types of schedules for an agent without creating a unique shift for him.

# Contracts

Contracts are sets of rules that describe the contact center's contractual obligations to agents. The maximum working hours for a contract should include allowances for meetings, training, overtime, and other planned, paid activities. You can configure an unlimited number of contracts. In some cases a unique contract might be necessary for each agent.

Use contracts to describe a single agent's availability. For example, a student might prefer to work Monday, Wednesday, and Friday evenings, any time Tuesday and Thursday, and have weekends off for study and fun. You could configure this student's contract to enable these availability parameters.

A contract is not the same as a shift. A shift indicates the hours an agent *will* work, whereas a contract describes how many hours an agent *should* work. For further details on shifts, see Shifts.

## Constraints for Working Days, Hours, and Days Off

You can set the numbers of working days and hours and days off for one of several scheduling periods, depending on which best suit your enterprise's business practices and any applicable legal requirements. You can set these parameters per week, per month, or per any period of 2 to 6 weeks.

For example, you can ensure that employees always receive 2 weekends off per month or work an exactly specified number of hours per 6-week period.

## Configuring Profiles

A *profile* is an abstract or hypothetical agent constructed from user-defined contract data. You can create multiple profile types, which you can use to construct schedules containing empty schedule slots appropriate for the contracts you have or intend to hire for. You can insert actual agents into the schedule slots after you build the schedule.

# Rotating Patterns

Rotating patterns increase scheduling flexibility and control. A rotating pattern is a series of weekly patterns arranged in a repeating sequence. You construct each weekly pattern from a combination of shift assignments, agent availability times, days off, and so on, depending on what constraint is most important for any specific day.

Rotating patterns include availability times as options for weekly pattern days. If used, these availability settings override the availability settings that you configured in the Contract module for that day. Rotating pattern assignments are displayed in the Calendar along with all other pre-planned data.