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Workforce Management Web for Supervisors Help

Insert Work Set Wizard

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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.