**Workforce Management 7.6**

# Supervisor

# User's Guide

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# Table of Contents

# Preface

Welcome to the Workforce Management Supervisor User's Guide. This document introduces you to the concepts, terminology, and procedures relevant to a Workforce Management Supervisor. All the information in this book can also be found in the Supervisor on-line help system.

This preface contains these sections:



Genesys Workforce Management is a contact center resource-planning application, which consists of a client, the Workforce Management GUI, and Schedule Server, Data Aggregator, and Web Services server software. The servers make data available to Workforce Management by writing it to the Workforce Management database, serve real-time agent states, and provide browser-based functionality.

Genesys Workforce Management unifies employee scheduling and preference allocation, planning, real-time and intraday management, performance assessment, and historical reporting into a consolidated contact center resource-planning application. The Workforce Management component in this product uses interaction data that the servers collect to:

- Forecast contact-center workload and workforce requirements.
- Create agent schedules.
- Monitor adherence to schedules, including the display of real-time agent states.

# Intended Audience

This document is intended for use by Supervisors at a contact center and those who train them. All information in this book can also be found in the Supervisors on-line help system, accessed through the Supervisor GUI.

# Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

## Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

76wfm_ref_03-2009_v7.6.101.00

## Type Styles

### Italic

In this document, italic is used for emphasis, for documents' titles, for definitions of (or first references to) unfamiliar terms, and for mathematical variables.

**Examples:**

- Please consult the *Genesys Migration Guide* for more information.
- *A customary and usual practice* is one that is widely accepted and used within a particular industry or profession.

## Screen Captures Used in This Document

Screen captures from the product GUI (graphical user interface), as used in this document, may sometimes contain a minor spelling, capitalization, or grammatical error. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from successfully using the product.

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When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Chapter

# 1 Getting Started

This chapter covers the following topics:



## Overview

With Workforce Management Web for Supervisors (WFM Web), site supervisors can use a web browser to:

- 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.
- Monitor real-time site performance.
- Review agents' real-time adherence to their scheduled status.
- Generate reports that show schedule and performance information.
- Configure e-mail notifications.

## Site Freedom

- 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 or 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 unexpectedly.
- 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.

## 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.

Note: WFM Web for Agents picks up the regional setting from the server where the WFM Web application is running—not from the agent's PC.

# Logging In

To start using WFM Web:

1. Open a web browser.

2. Type the WFM Web URL (address) into your browser's address bar and press **Enter.**

   Note: Your system administrator will provide the URL.

   The Login window displays.
3. Enter your user name and password.
4. Click **OK.**

If WFM Web validates your user name and password, and detects the required Java plug-in, the WFM Web application opens in a separate browser window. (The original browser window remains open, displaying a Genesys logo. You may close this window, if desired.)

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 mis-typed your user name or password), or click **Show error details.**

Note: Multiple Supervisors using the Firefox web browser cannot be logged in to the same host at the same time.

# The Supervisor's Window

## Elements of the Supervisors Window

**Menu Bar** The pull-down menus located at the very top of the WFM Web window allow you to jump directly to particular features. For example, use the Modules menu to navigate among modules, or use the Help menu to display the Help index or the program version.

**Actions Menu** From the menu bar, pull down the Actions menu to select from a list of view-specific commands. (This menu's contents change as you move among modules and views.)

**Standard Toolbar** The toolbar, located below the menu bar, always includes the following four standard buttons:

**Refresh** updates the Objects tree's contents, and then invokes Get data to update the working pane's contents. (Click this button to pick up other users' changes to the Workforce Management (WFM) database or to WFM configuration.)

**Stop** halts a pending data retrieval or display operation.

**Modules** displays or hides the Modules tree.

**Objects** displays or hides the Objects tree.

**Actions Toolbar** Many views (Configuration, Forecast, Schedule, Trading, Performance, Adherence, Reports) add a second toolbar, containing buttons for the actions that you can take in that view. These buttons correspond to the commands on the Actions menu. Hover your mouse pointer over a toolbar button to see a tooltip that displays the button's name.

**Views Toolbar** Some views add a third toolbar, containing a drop-down list that you can use to jump to the current module's other views.

**Modules Tree** The Modules tree, at the upper left in the Modules pane, enables you to move among modules and views. To display the views available within a module, either click that module's icon, or click its expand/collapse control once. To select a particular view, click it in the tree.

**Objects Tree** The Objects tree, at the lower left in the Objects pane, displays the database objects that you can retrieve in the selected module and view. A similar tree appears within some dialog boxes and wizards. The database objects that display here depend on what is selected in the Modules tree.

The tree is hierarchical from top to bottom: Enterprise (displayed for some modules), Business Units (if any), Sites, Teams, and Agents. At the site level, you may see a node 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, the <None> node is empty. The only exception to this hierarchy is when Scenarios is selected or when you use the Configuration or Reports modules.

Clicking an object in the tree (or clicking its expand/collapse control) displays the object's contents to the right of it. When you have displayed the desired object, 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 respective check boxes. Certain views do not display check boxes; in this case, you can select multiple objects by clicking the group of objects while holding down 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 once on it to collapse the item's contents and see more parallel items.

**Working 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.

**Note:** 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 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.)

## 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.

In the figure below, the Agent column is specified as the sort key, in ascending order.


**Figure 1: Sorting by Agent**

# 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:


**Figure 2: Date-selection Controls**

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.

**...Date**—Click this button to open the monthly calendar.

**End —**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.

**Note:** If the WeekStartDay setting has been specified in the WFM Configuration Utility, 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 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 Module 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** to close the Find Agent dialog box.

# Logging Off

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

**Warning!** 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.

Chapter

# 2 Configuration Module

This chapter covers these topics:



From the Configuration module, you can access:

- Notifications
- Colors

## Configuring Notifications Overview

Under Configuration, use the Notifications module to create and edit e-mails 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. In order 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 type(s) are sent.

### Security Permissions

You must have certain security permissions assigned in the Configuration Utility. 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 the current *Workforce Management Administrator's Guide*.

# Notification of Schedule Trade Status Changes

Note: In order to configure notifications of schedule trade status changes, you must have the Configuration, Notifications permission assigned in the WFM Configuration Utility.

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

1. In the Modules tree, expand the Configuration module.
2. Click **Notifications**. 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).

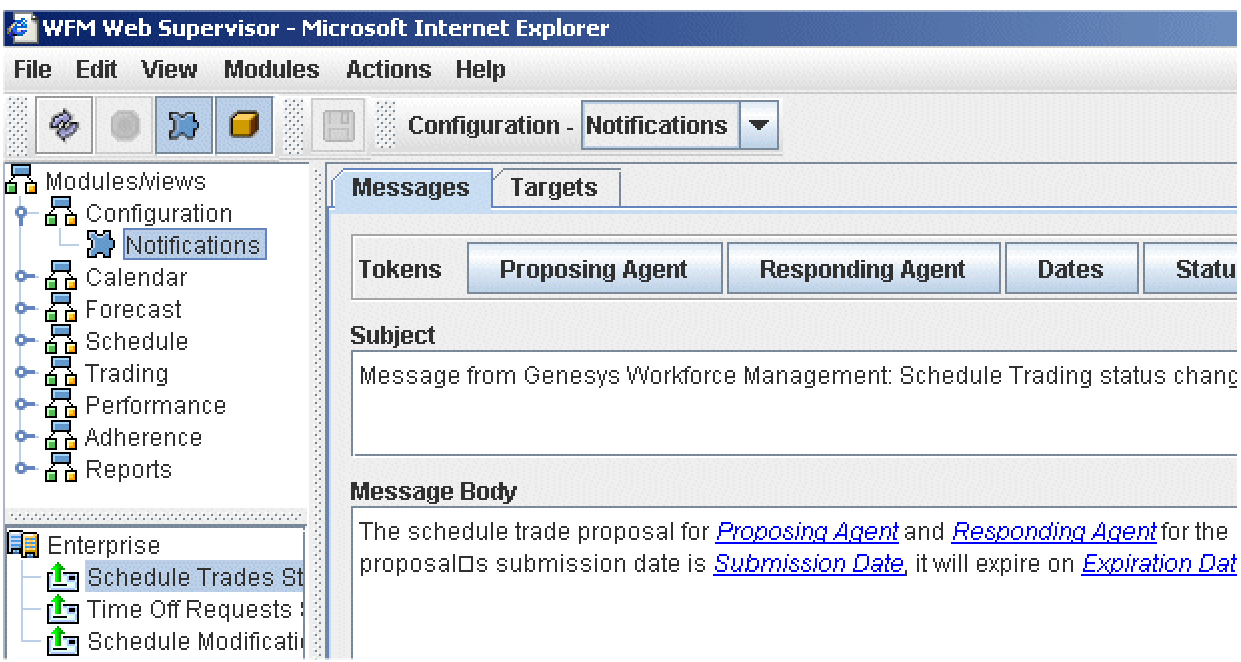


**Figure 3: Notifications module, Schedule Trades Status Changes object, Messages tab**

## Message Tab

The message tab has three areas:

- **Tokens**. This area contains buttons for inserting tokens into the message body. Available tokens related to agent schedule trades are: Proposing Agent, Responding Agent, Requested Dates, Status, Submission Date, Expiration Date.
- **Subject**. This area contains Genesys-supplied subject text, which you can modify by changing text and inserting variables (tokens). The supplied text is:

  `Message from Genesys Workforce Management: Schedule trading status changed.`
- **Message Body**. This area also contains Genesys-supplied body text, which you can modify by deleting/typing over text and inserting tokens. The supplied text is:

  `The schedule trade proposal for <`*`Proposing Agent`*`> and <`*`Responding Agent`*`> for the date(s) <`*`Dates`*`> has been updated with the status of <`*`Status`*`>. Trade proposal submission date is <`*`Submission Date`*`>. It will expire on <`*`Expiration Date`*`>.`

## 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 the Save button 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 Daemon uses the specified Subject and Body and the rules listed below when sending notifications to agents and supervisors. In the rules below, 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.

- Supervisor(s) associated with the selected sites get notified when a trade status is Pending.
- The responding agent gets notified when the status of a trade proposal is In Review or Open.
- The proposing agent gets 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 checkbox 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.

# Notification of Time-Off Request Status Changes

To configure notifications of time-off request status changes, you must have the Configuration, Notifications permission assigned in the WFM Configuration Utility.

To bring up the module for notification of time-off request status changes:

1. In the Modules tree, expand the Configuration module.
2. Click **Notifications**. 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)).

# Message Tab

The message tab has three areas:

- Tokens. This area contains buttons for inserting tokens into the message body. Available tokens related to agent schedule trades are: Proposing Agent, Responding Agent, Requested Dates, Requested Status, Submission Date, Expiration Date.
- Subject. This area contains Genesys-supplied subject text, which you can modify by changing text and inserting variables (tokens). The supplied text is:

  `Message from Genesys Workforce Management: Schedule trading status changed.`
- Message Body. This area also contains Genesys-supplied body text, which you can modify by deleting/typing over text and inserting tokens. The supplied text is:

  `The schedule trade proposal for <Proposing Agent> and <Responding Agent> for the date(s) <Dates> has been updated with the status of <Status>. Trade proposal submission date is <Submission Date>. It will expire on <Expiration Date>.`

## 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 the Save button 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 Daemon uses the specified Subject and Body and the rules listed below when sending notifications to agents and supervisors. In the rules below, 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.
- Supervisor(s) associated with the selected sites get notified when a trade status is Pending.
- The responding agent gets notified when the status of a trade proposal is In Review or Open.
- The proposing agent gets 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 checkbox 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.

# Notification of Schedule Modifications

To configure notifications of schedule modifications, you must have the Configuration, Notifications permission assigned in the WFM Configuration Utility.

To bring up the module for notification of schedule modifications (sent to agents only):

1. In the Modules tree, expand the Configuration module.
2. Click Notifications.

3. In the Objects tree, select Schedule Modifications. The Working pane shows the Messages tab where you configure the message Subject, Body, and variables (tokens).

## Message Tab

The message tab has three areas:

**Tokens**. This area contains buttons for inserting tokens into the message body. Available tokens related to agent time off requests are: Agent, Requested Dates.

**Subject**. This area contains Genesys-supplied subject text, which you can modify by changing text or inserting tokens. The supplied text is:
`Message from Genesys Workforce Management: Schedule modification occurred.`

**Message Body**. This area also contains Genesys-supplied body text, which you can modify by deleting/typing over text and inserting tokens. The supplied text is:
`The schedule for <Agent> has been modified for the date(s) <Dates>.`

## 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 variable (token).
3. Click the appropriate token button. The variable gets inserted.
4. Click the Save button 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 sites. You can expand business units to display their sites. You can select multiple sites.

## Rules for Sending

When a supervisor changes one or more schedule days, WFM sends a schedule modification notification to the configured site's affected agent.

Chapter

# 3 Calendar Module

This chapter covers the following topics:



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.
- Select **Time Off Limits** to set time-off limits.

## Calendar Items Overview

The Calendar module includes Calendar Items 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 tabs are at the top of the Objects Tree.

Use the Calendar Items module to add, and edit agents' exceptions, preferences, and time off, as well as grant rotating patterns.

- 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.

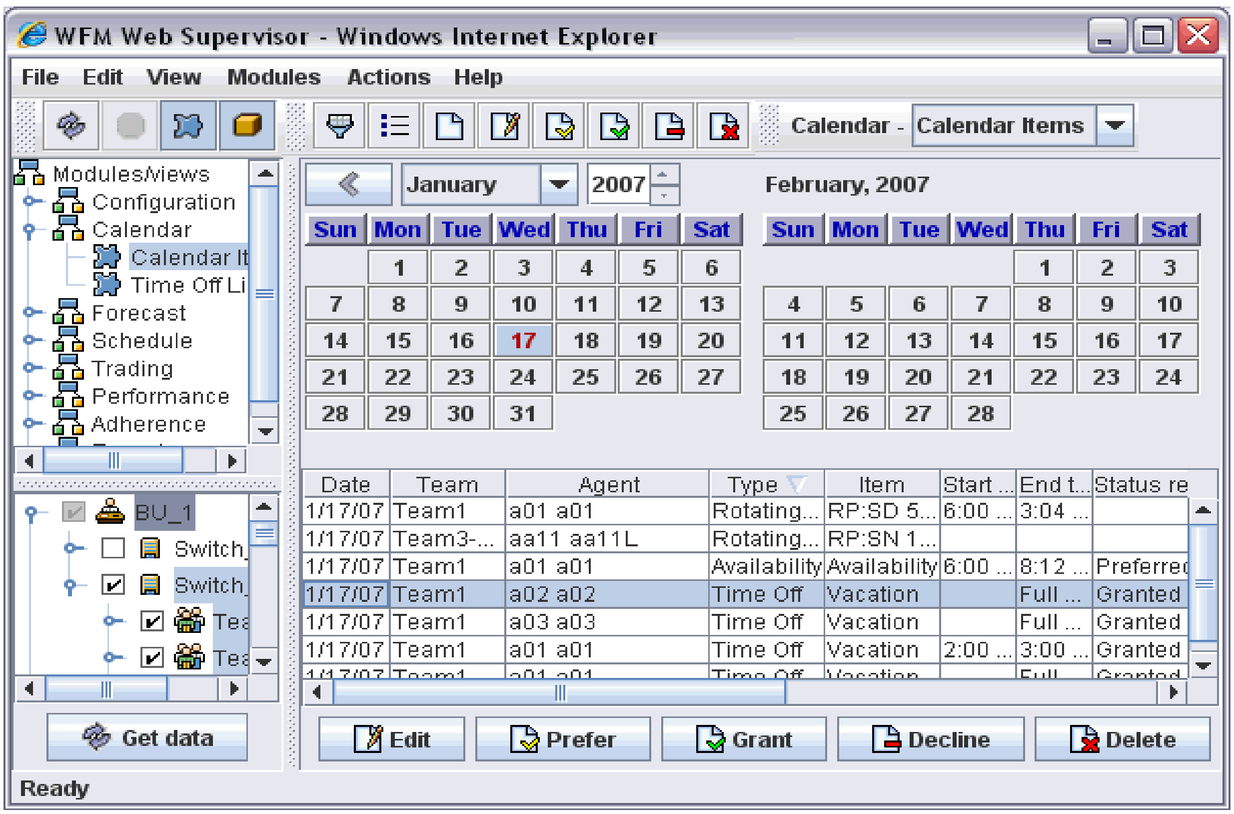


**Figure 4: Calendar Items module**

# Calender Module Controls

The Calendar Items module displays the following controls and columns:

**Toolbar Buttons**—Click the `Filter` button to filter the display. Click the `Options` button to select whether to include these columns in the table: Team, Reason, Comments, Paid Hours, Hire Date, Submitted. Click the `Add calendar items` button to add Calendar items


**Figure 5: Toolbar Buttons**

**Action Buttons**—Click `Prefer`**,** `Grant`**,** or `Decline` to change the status of selected preferences. Click `Delete` to remove selected Calendar items. Click `Edit` to edit one selected Calendar item.


**Figure 6: Action Buttons**

## About the Calendar Items Module

The Calendar Items module displays agents' shifts, days off, time off, exceptions, availabilities, and rotating pattern assignments. 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.

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`Note:` Rotating pattern information is read-only. Rotating patterns appear with an *RP:* prefix. To change rotating pattern settings, you must use the Rotating Patterns window in the WFM Configuration Utility's Policies module. See the current *Workforce Management Configuration Utility Help* for more information.

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## Calendar Module Security

The WFM Configuration Utility 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, the Grant, Prefer, and Decline buttons are disabled. You can only add, edit, or delete calendar items in Preferred status.

## Displaying the Calendar Module

To view Calendar items:

1. If the Calendar Items module is not displayed, expand **Calendar** on the Modules pane and click **Calendar Items.**
2. In the three-month Calendar display, select the dates to view as explained below.

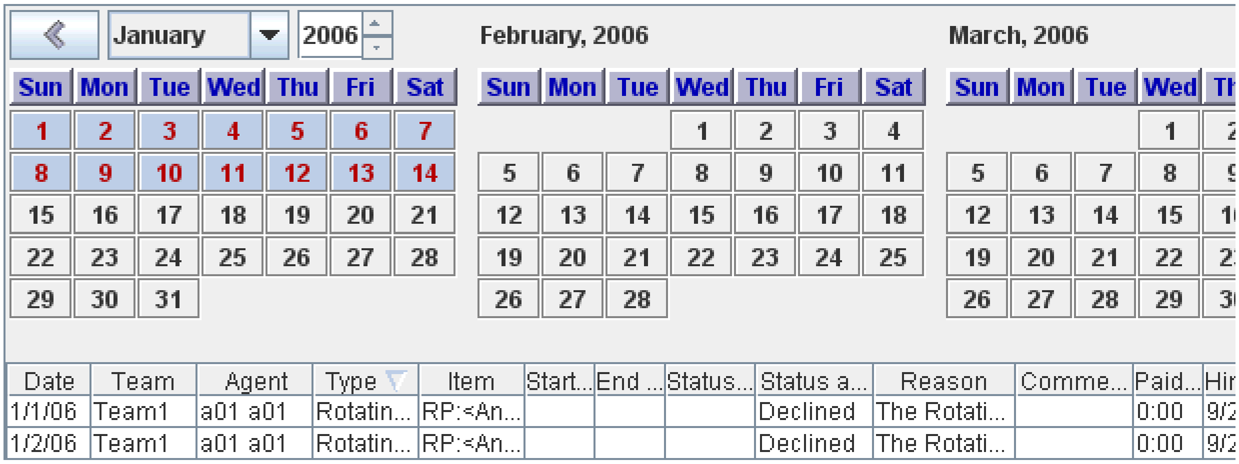


**Figure 7: Three-month Calendar Display**

# Calendar Module Columns

**Date**—Displays the date of the Calendar item.

**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. A plus sign (+) indicates the day 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” on page 35 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 Management: Granted, Declined, Preferred, Scheduled, or Not Scheduled.

See “Change Preference Status” on page 35 for an explanation of the statuses. See “Requested Status vs. Actual Status” on page 36 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—**Displays any comments associated with the Calendar item, including ones that may 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/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 a site, one or more teams, or one or more agents from the Objects tree. (You can select multiple teams or agents within a single site, but not from more than one site.)
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.

Note: 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, white and grey, and two colors for selected items, light blue and dark blue.

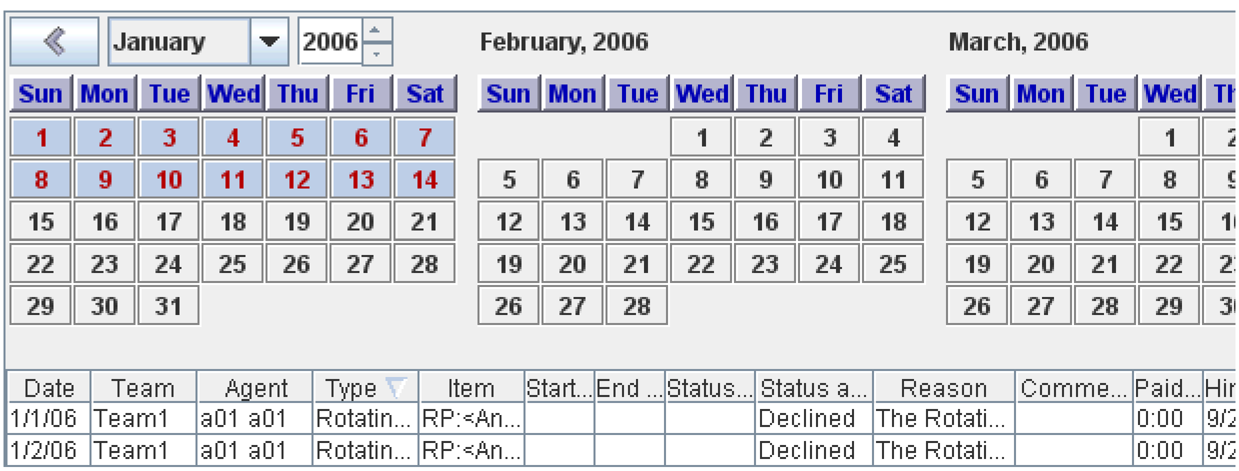


**Figure 8: Three-month Calendar Display**

- *Grey* indicates a non-selected cell for which data has not been requested. There may be data for that day or there may not.
- *White* 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.
- *Light blue* indicates a selected cell for which there is data.
- *Dark blue* 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 three text colors, black, white, and red.

- *Black* indicates that you have not yet requested data for a day or that you requested data and there is no data for that day.
- *White* replaces black on the dark-blue background for legibility.
- *Red* indicates that there is data for that day. That is, at some earlier point in this session you selected this date and clicked Get data.

# Filter Dialog Box

Use the Filter dialog box to change which items appear in the Calendar Items module:

1. Open the Calendar module.
2. Select an object (site, team, or agent) from the Objects tree.
3. Select a date or dates from the Calendar.
4. Click **Get data**.
5. Click the **Filter** button on the Calendar Items module toolbar. The Filter dialog box appears. It has three tabs: Calendar Items, Status Requested, and Status Actual.

   *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.
6. 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.
7. Click **Apply** to save your changes, or **Cancel** to restore the existing selections.

The Calendar view is updated to match your selection.

Note: 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 Box

Use the Options dialog box to show or hide two columns in the Calendar items table: Reason and Comments.

**Site—**The site of the Agent who appears in that row.

**Team—**Team of the Agent who appears in that row.

**Reason—**An explanation for why the actual status is different from the requested status.

**Comments—**Any comments 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 Items module on the Modules pane, select an object (a site, team, or agent) from the Objects tree, and select a date or dates from the Calendar, and click **Get data**.
2. Click the **Options** button on the Actions toolbar or select **Options** from the Actions menu. The Options dialog box opens. Under Columns, check boxes appear opposite Reason, Comments, and Paid Hours.
3. To display a column, select the check box next to its name. To hide it, clear the check box.
4. Click **Apply** 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 scheduled 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.

---

Note: 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.

Note: Rotating pattern assignments are Granted by default, so they do not need a separate status saved to the database.

# Add Calendar Items Wizard

## Overview

Using this wizard, you can add: availability, time off, days off, shifts, and working hours. (This wizard is available to supervisors with the appropriate security access.)

To use the wizard:

1. Open the Calendar Items module.
2. Select an object (a site, team, or agent) from the Objects tree.
3. Select a date or dates from the Calendar.
4. Click Get data.
5. Click the Add Calendar Items button on the toolbar.

For instructions on filling in each wizard screen, see:

- 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 Agents

The Add Calendar Items Wizard's first screen is Choose Agents.

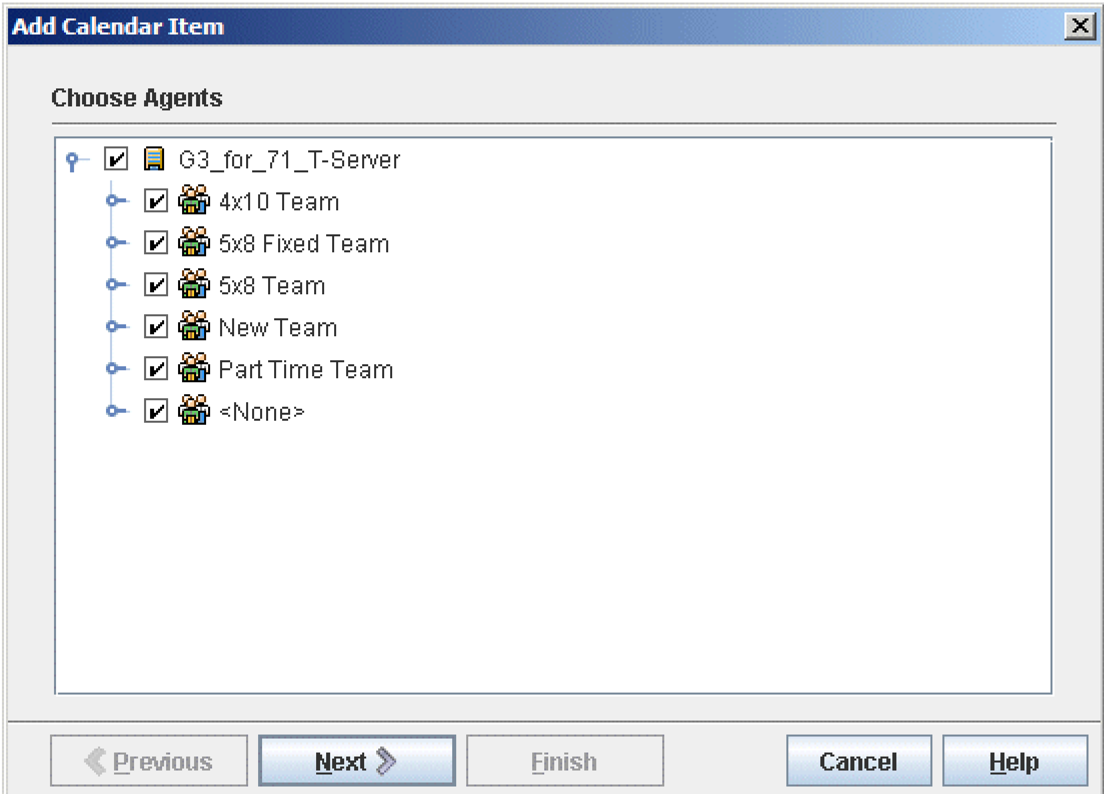


**Figure 9: Choose Agents Dialog Box**

By default, the enterprise, business units, sites, teams, and agents that were selected in the Calendar when you clicked the Add Calendar Items button are selected.

1. Change the selections, if necessary.
2. Click **Next** to continue.

Note: If you select objects from more than one site, then the next page (Choose Calendar Item) will display a limited list of calendar item types: availability, day off, and working hours.

The second wizard screen, Choose Calendar Item, opens.

# Choose Calendar Item

The second Add Calendar Item Wizard screen is Choose Calendar Item.

To choose an item:

1. Select a Calendar item type.

If you selected objects from more than one site on the previous page (Choose Agents), then the list of calendar item types is limited to: Availability, Day Off, and Working Hours.

2. Set the Requested state to Preferred, Granted, or Declined.

   If you selected Working Hours or Exception, the Required state is preset to Granted. If you grant a Day Off, Scheduler will grant the day off regardless of the impact on service levels.

3. Click **Next.**

   Depending on your selection here, one of several screens appears. See Calendar Items Wizard Screen Sequences for the next screen for each calendar item type.

4. Fill in the information requested on the next screen and then click **Finish** to save your request. To close the wizard without saving, click **Cancel.**

If WFM Web cannot assign some selections, it opens a window that lists the agents, days, and reasons involved.

## Add Calendar Item

The third Add Calendar Item Wizard screen is Add Calendar Item.

To add an item:

1. Select the specific type of the item that you are adding, from the table.

   If you selected Time Off on the previous wizard page, you can select the Show all check box to display all time-off types. Or, you can clear the check box to display only the time-off types that are applicable to the selected agent.

2. Make other selections from the dialog, as needed.

   Your available choices will vary depending on the type of calendar item you are adding.

3. Click **Finish**.

Notification about Granted, Not Scheduled item(s) is sent to the supervisor only if an agent added the item(s).

# 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.

Note: 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.

Note: 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.**

The Calendar reappears, displaying the new or edited availability or working hours.

## 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, the Choose Exception screen appears when you click Next.

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.

   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 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.

   Note: 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 (known as *Total Hours* or *Duration*).

4. If you want to enter a comment, type it into the Comments text box.
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.

## Add or Edit Shifts

If you select Shift on the Choose Calendar Item screen, the Choose Shifts 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

If you select Time Off on the Add Calendar Item screen, from within either the Intra-day or Agent-Extended view, 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. 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.

**2.** If the time-off preference is for a full day off, select the Full Day check box. This action changes some parameters:

The Start Time and End Time fields are disabled.

The Specify Paid Hours check box is enabled. Use it to specify the exact number of hours in a full day for this particular time off. Then enter or select in the Paid Hours box.

You may 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 type of time off being inserted. If you selected multiple agents, the default value is 0.

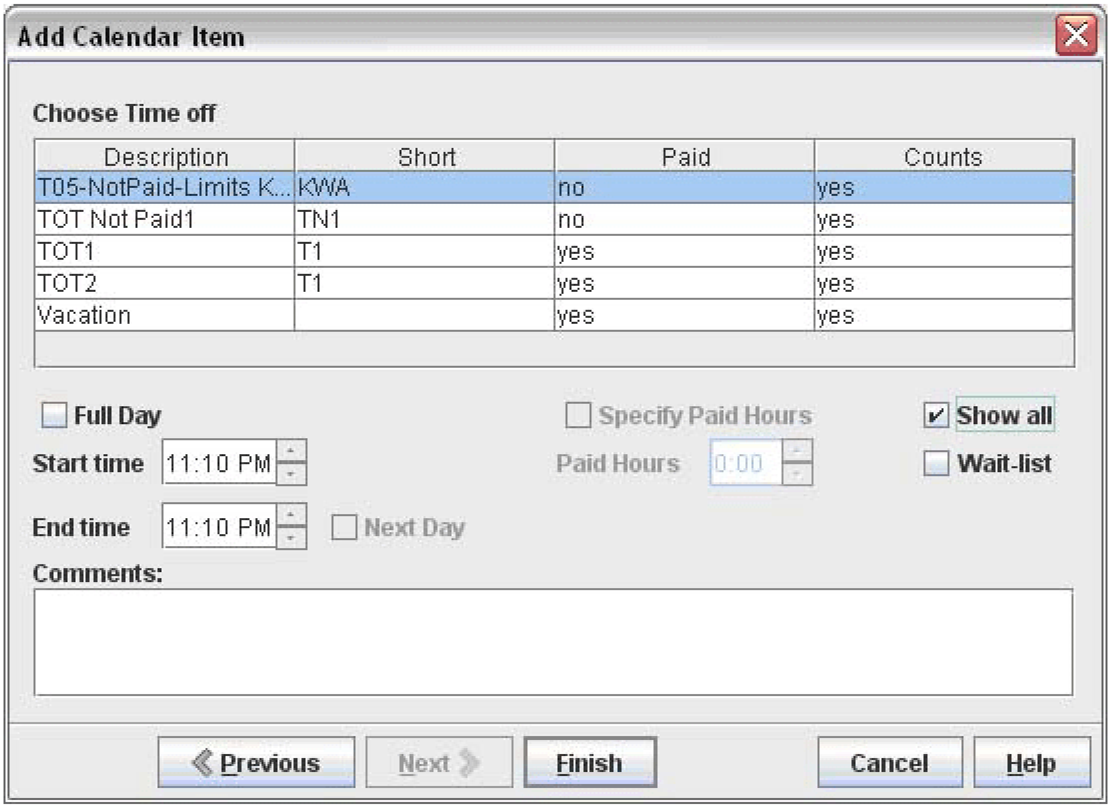


**Figure 10: Choose Time Off Dialog Box**

3. Select the `Show all` checkbox to display all Time Off types. Clear the checkbox to display only Time Off types that are applicable to the selected agent.
4. Select the `Wait-list` check box to specify that if a time off request is denied because the time-off limits have already been reached, the request will stay in a Preferred status, in case an opening becomes available. The request could eventually be granted by a Supervisor, although this is not guaranteed.
5. For part-day time-off preferences, set the start and end times. If the end time falls on the following day, select the Next Day check box.

---

Note: Part-day time off must comply with all settings for at least one qualifying shift, including meal parameters.

---

6. If you want to enter a comment, type it into the Comments text box.
7. Click **Finish.**

The Calendar reappears, displaying the new or edited time-off item.

Note: 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 or Recalled, 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.
4. 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

5. 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.

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 appears. See the table below for a list of the Calendar-item types and the edit screen that opens for each.

3. Change the Calendar item's settings as necessary.

   The available settings depend on the type of item that you are editing. For detailed instructions for each screen, use the table below to find the appropriate Help topic.

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.

## Calendar Items Wizard Screen Sequences

- **Calendar Item:** Next Screen
- **Availability:** Choose Start/End Time
- **Day Off:** Comments
- **Exception:** Choose Exception
- **Shift:** Choose Shift
- **Time Off:** Choose Time Off
- **Working Hours:** Choose Start/End Time

# Review Calendar Messages Dialog Box

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.

Note: Although you can override warnings, you cannot override error messages; their check boxes are disabled.

# Time Off Limits

## Overview

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 set limits for the maximum number or maximum percentage of agents who can be on time off at any one time.
- You can set different time-off limits for each timestep during the day, enabling more agents to take time off during non-peak work periods.
- You can see the actual numbers percentage of agents who are scheduled for time off and compare your limits with the actual values.
- You can set minimum time-off limits for each timestep. See Setting Minimum Time-Off Limits for details.

---

Notes: The time-off limits apply to all time-off types that have the Counts toward time-off limits parameter selected in the Configuration Utility, Time Off Types window, Properties tab. 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 since planning (the Calendar) usually is done before scheduling.

---

## Setting Time-Off Limits

1. Select a site, team, multi-site activity or activity in the Objects tree. You cannot select a business unit or an individual agent.
2. Select the period to be displayed in the table, Year, Month, or Week. By default, the selected period is Year. The granularity associated with the selected period appears in the read-only Granularity text box.

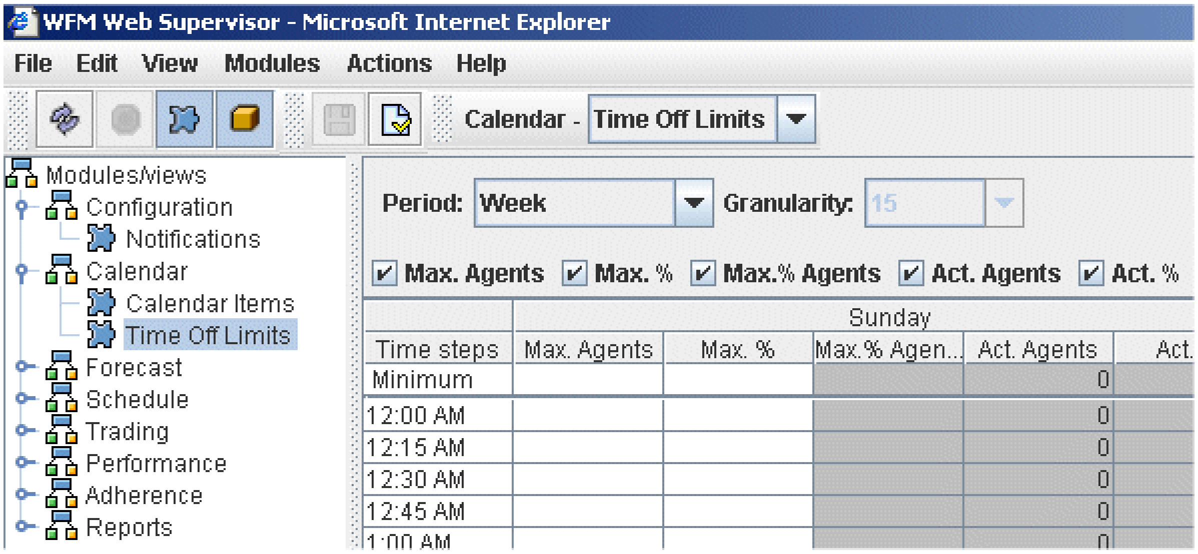


**Figure 11: Calendar Time Off Limits module**

3. To change the dates that are displayed in the table, click < or > on either side of the date range at the top of the window, or click the drop-down arrow to open a calendar from which you can select a date.

   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.

4. 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.

   The set of columns repeats seven times in each row. Each repeat contains the values for one day of the week.

5. 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.

Note: Cells with gray backgrounds are not editable. They either fall outside the selected period or contain values that WFM generates automatically.

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.

6. 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.
7. To keep your changes, click the Save button, which is located on the Action toolbar, or select Save from the Actions menu.

Note: 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 business unit, 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 business unit, 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 must be a whole number, so fractional values are rounded down. 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.

Note: 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.

# The Set Values Dialog Box

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. Open the Calendar module and select **Time Off Limits**.
2. Select a site, team, or activity in the Objects tree.
3. Select **Set Values** from the Actions menu.

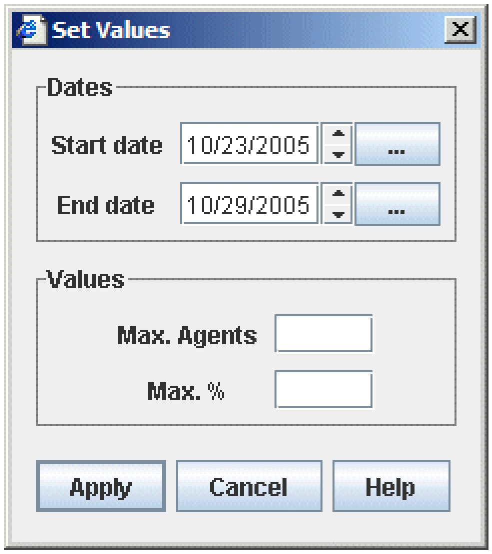


**Figure 12: Set Values Dialog Box**

**4.** Enter a start date and end date for the period.

**5.** 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.

**6.** 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.

Chapter

# 4 Forecasting

This chapter covers the following topics:



## Overview

Use the Forecast module to create and edit forecast scenarios, and to publish the best scenario to the Master Forecast.

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, e-mail, 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.

## 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 the Modules tree for that scenario: Scenario Volumes View, Scenario Staffing View, and Scenario Graph View.

- 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. You import historical data using the WFM Configuration Utility.

- 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):

**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.

**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. 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.

**Adjust Volumes**—Use the Adjust Volumes dialog to adjust the volume, the average handling time (AHT), or both, for a selected Scenario Volumes View.

# New Forecast Wizard

## Overview

Use the New Forecast Wizard 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.

To use the New Forecast Wizard:

1. Open the Forecast module.
2. Select Scenarios.
3. On the Forecast Scenarios view toolbar, click the New button.

   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

In order to better understand WFM forecasting and scheduling views and dialog boxes, it is helpful to review certain Configuration Utility terminology.

### Activities

*Activities* are work that is tracked and managed using Genesys Workforce Management. On a general level, example activities are answering inbound calls, responding to e-mail, 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 Configuration Manager and then imported into WFM via Configuration Utility. You can also create sites in Configuration Utility 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.

## General Parameters

Use the General Parameters screen 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.

Note: 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.

## Select Activity

Use the Select Activity screen 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 Configuration Utility.

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.

**Note:** You can add activities to a forecast after it has been created.

3. Click **Finish** to generate the new forecast.

# Forecast Scenarios

## Overview

After you create a forecast scenario using the New Forecast Wizard:

Use the Forecast Scenarios View to open the forecast scenario. You can then select the following views in the Modules tree for that scenario:

**Forecast Scenario Volumes View** enables you to build, view, and edit a scenario's interaction volume and average handle time.

**Forecast Scenario Staffing View** enables you to build, view, and edit a scenario's calculated and required staffing.

**Forecast Scenario Graphs View** displays your choice of statistics for this forecast, using line charts.

Click a branch in the Modules tree to open the corresponding view. Or use the Views toolbar's Scenarios drop-down list to move among these views.

If you open other scenarios, their views also appear in the Modules tree and in the Scenarios drop-down list. To remove a scenario's views from these controls, close that scenario.

### 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.

## Forecast Scenarios View

Use the Scenarios view to create, open and work with existing forecast scenarios.

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

In the Modules tree, click **Forecast > Scenarios** to activate the Scenarios view.

### 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. Visible only if you have the permission Access Shared Scenarios. See the Configuration Utility help topic, Forecast Security Options.

**Other Scenarios** displays (if you have the appropriate access rights) unshared scenarios created by other users.

You can select All Scenarios or a lower-level option. Your selection retrieves matching scenarios and insets 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):

**New**—Opens the New Forecast Wizard.

**Open**—Opens the selected scenario from the Scenarios table. You can then edit its properties using the Data tab.

**Close**—Closes the open 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.

**Sort**—Opens the Sorting dialog box, which allows sorting by Team Name, Contract, Agent Name (first or last), or Agent Rank. 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.

## Scenario Properties—Data Tab

In the Scenario Properties panel 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 panel 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. Click the toolbar buttons on the image to jump to their 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. In the Forecast Scenarios view, select a scenario.
2. In the Modules tree, click **[Scenario-name] Volumes.**

   The Volumes view appears.
3. In the Objects tree, select an activity, multi-site activity, site, or Business Unit.

Statistics populate the grid.

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.

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 Grid Properties and Date Range

Use these options in the Grid properties and Date range panels (near the top) to customize the grid:

- The grid displays data for a period of a year, month, planning period, or week. To change the period, click Year, Month, Planning Period, or Week from the Period drop-down list to change the time range 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.
- Show, or hide, columns by selecting (or clearing respectively) the Volume, Volume %, and AHT check boxes.
- Use the standard date-selection controls to jump to a different week within the forecast scenario's date range.

## 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, 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.

Note: 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.

## Editing 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.

### Toolbar: Modifying and Managing Scenario Data

You can use the following buttons on the toolbar (the same commands also appear on the Actions menu):

**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.

**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 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.

**Split—**Opens the Volume Split Wizard, which splits staffing from a multi-site activity Staffing forecast scenario.

**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

## Overview

Use the Volumes Build Wizard 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.

Note: Depending on the build method you specify, you may need to import historical data (using the WFM Configuration Utility) or create interaction volume, average handling time, or overlap templates before using this wizard.

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 the selected build method is Use Value, you supply interaction volume and/or average handling time values and click **Finish**.
   - If the build method is Expert Average Engine, Universal Modeling Engine, or Copy Historical Data, you will need to complete the Select Historical Data screen.
   - If the build method is Template Based, or if you select Use Overlap Templates on the Select Historical Data screen, you complete one or more screens for selecting templates.
   - If the build method is Expert Average Engine or Universal Modeling Engine, you will need to complete the Select Events screen.
6. After clicking Finish in the last screen, WFM builds the volumes forecast and the Scenario Volumes View reappears, showing your results.

## Select Activities

The Forecast Volume Build Wizard's first screen is Select Activities. The activities you previously selected for the scenario in the New Forecast Wizard 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. An example business unit with multi-site activities is shown below.

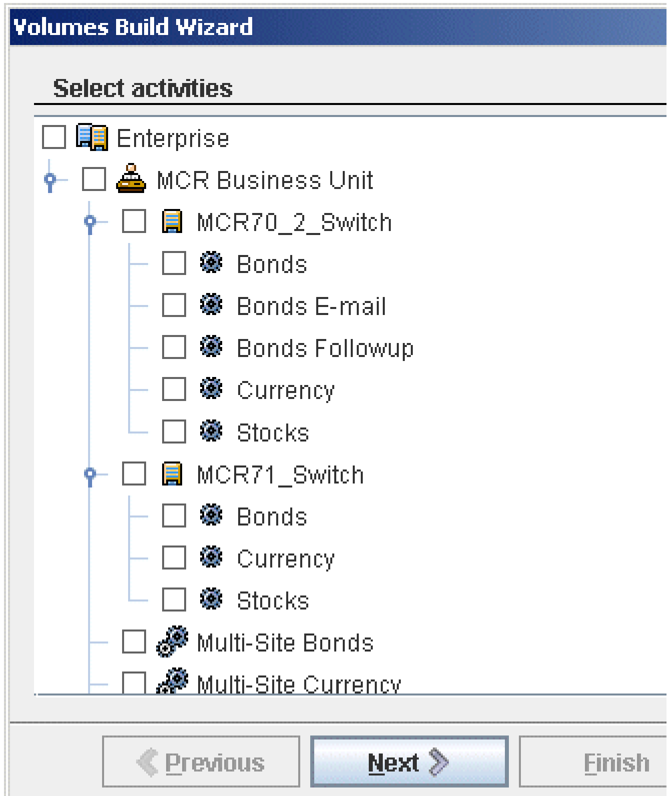


**Figure 13: Business Unit with multi-site activities (at bottom)**

**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.

Note: 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.

# Select Data Build Method

Use the Select Data Build Method screen 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
- Under Target Dates, select the date range for the forecast data. The date range cannot be outside the scenario date range.
- Select the forecast build Method: Template Based, Expert Average Engine, Universal Modeling Engine, Copy Historical Data, or Use Value (see definitions below).
- Click **Next** to open the wizard's next screen.

The following sections explain the Method options that are available:

## Template Based

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 forecasted, 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.

## Select Historical Data

Use the select Historical Data screen 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 and End 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.

> Note: 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.
3. If you selected the Copy Historical Data method on the previous screen, enter a number into 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%.
4. 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.

# Select Templates

Use the screens described below to incorporate templates into your Forecast Volumes scenario. The Forecast Volumes Build Wizard 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.

   If the Forecast type was Interaction volume, the Finish button becomes enabled.
6. Click **Next**. 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 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 shown above.

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 shown above.

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.

   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 shown above.

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.

## Select Events

Use the Select Events screen to factor events into a Forecast Volumes scenario.

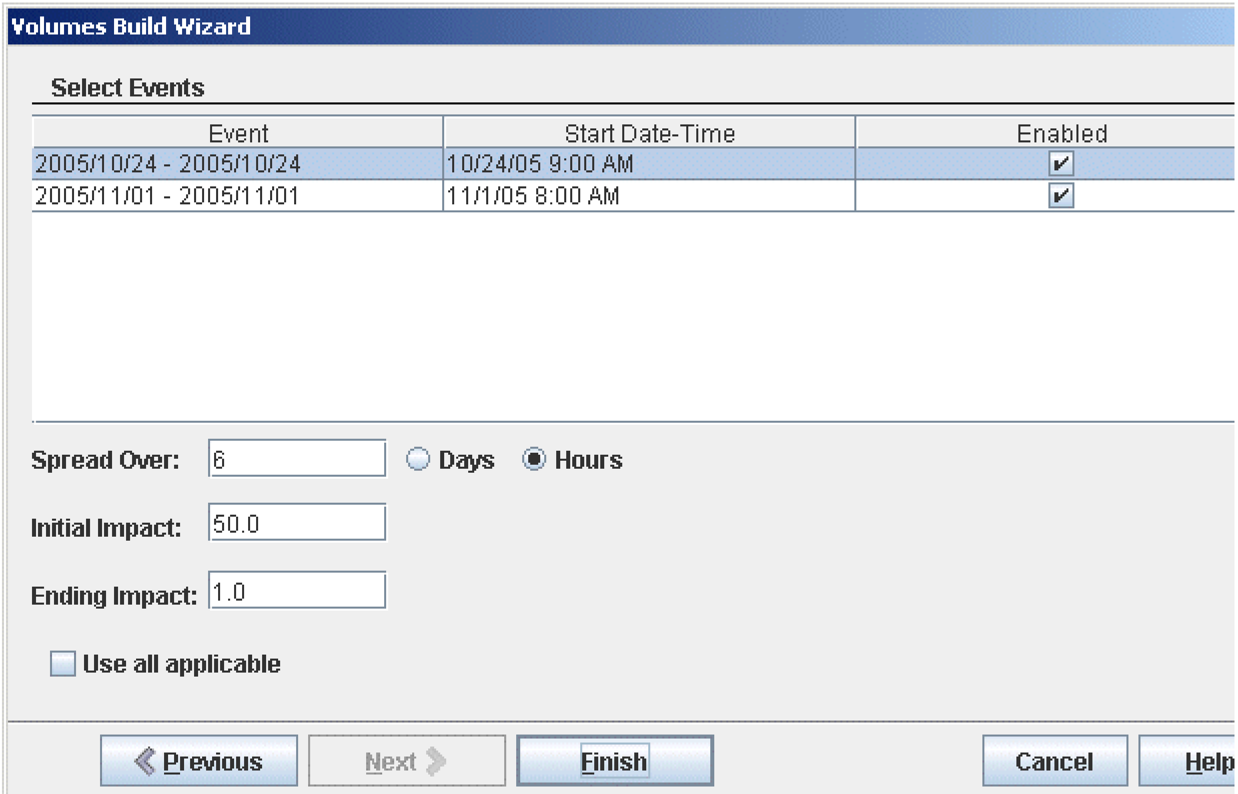


**Figure 14: Volumes Build Wizard, Select Events**

Note: You must create factors and events in the WFM Configuration Utility, and assign them to activities there, before you can add events to a forecast scenario in WFM Web.

- A factor 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 a factor is in effect.

To add events:

- Select the Enabled check box for the events that you want to include. As an alternative, use the All Applicable check box.

If you are using the Universal Modeling Engine, this is all you need to configure. Click **Finish**.

If you are using the Expert Average Engine:

1. Enter a Spread Over value for each event. This determines the period that the event affects.
2. Click **Days** or **Hours.** This determines whether the Spread Over value is interpreted as days or hours.

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 WFM Configuration Utility. Adjust the Initial Impact and/or Ending Impact value, if appropriate.

3. Check the All Applicable check box if the forecast build algorithm should use all events or factors applicable to the selected activities that fall into the scenario/historical data date range. When checked, disables the fields and controls that appear above.
4. 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).

## 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. Click the Split button on the Forecast Scenario Volumes View toolbar.

   The first of the Volumes Split Wizard's two screens, Select Multi-site Activities, opens.
3. Select the check boxes next to the multi-site activities that you want to split.

   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.

Note: 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.

5. Click **Next.**

   The wizard's second screen, Select Activities within Multi-site Activities, opens.
6. Select the local (target) activities into which you want to split the multi-site activities.

You can select several target activities.

If you selected **Use AHT Forecast** on the first screen, then you cannot select target activities that do not have at least one timestep with at least one AHT value greater than zero.

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. Note that this option does not affect the split result if there are no shared multi-skill agents who work on both selected and unselected activities.

7. To have WFM consider existing Calendar items when splitting the interaction volume among activities, select the Consider Granted Calendar Items check box.
8. Click **Finish**.

WFM Web displays a Progress dialog box while it splits the activities. Click this box's Cancel button if you want to cancel the split.

After splitting the activities, WFM Web returns to the Volumes View.

## Adjust Volume Dialog Box

Use the Adjust Volume dialog box to adjust the volume, average handling time (AHT), or both for a selected Scenario Volumes View.

1. Click the Adjust button on the Forecast Volumes scenario toolbar. The Adjust Volume dialog box opens.
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:

- In the field Start Time, 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.

AND

- 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. Click an Action button on the image below to jump to its description. Click the toolbar buttons on the image to jump to 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. In the Forecast Scenarios view, select a scenario.
2. In the Modules tree, click [**Scenario-name**] **Staffing.**

   The Staffing view appears.
3. In the Objects tree, select an activity.

Statistics populate the grid.

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.

## Setting the Grid Properties and Date Range

Use these options in the Grid properties and Date range panels (near the top) to customize the grid:

- The grid displays data for a period of a year, month, or week. To change the period, click Year, Month or Week from the Period drop-down list to change the time range 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.

- Show columns, or hide them, by selecting or clearing (respectively) the Calc or Req check boxes.
- Use the standard date-selection controls to jump to a different week within the forecast scenario's date range.

## 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. 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 working overheads, and so on.

In WFM, the number of FTEs is provided 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.

Note: 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):

**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—**Opens the Save as Template Wizard, 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.

**Required staffing—**Opens the Required Staffing dialog box, where you can set the forecast's required number of agents.

**Split—**Opens the Volume Split Wizard, which splits interaction volumes from a multi-site activity to site-specific activities.

## Required Staffing Dialog Box

Use the Required Staffing dialog box to define required staffing values in a forecast scenario's Staffing view.

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Note: Before selecting the template option in this dialog box, create templates as needed.

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To set required staffing when a Staffing view is selected:

1. Bring up the Required Staffing dialog box by clicking the Required Staffing toolbar button.
2. In the resulting dialog box, select one of the following radio buttons:
   - Select **Load Calculated Staffing** to set the required staffing to the same values as the calculated staffing.
   - Select **Use template** to load a template for the required staffing value.
3. You have the option of entering a percentage in the Adjust by field. Valid values are from -99 to 999.

4. If you selected Use template, do the following:
    - Click **Load Template**.
    - In the Staffing Templates window that appears, select a template and click **OK.** This restores the Required Staffing dialog box.
5. Click **OK** to close the Required Staffing dialog box and load your selection into the Staffing view.

### 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 the calculated staffing.
- Forecasts can contain both calculated and required data. You can build schedules with either set of data.
- Required staffing can be composed of a combination of template values, manually entered amounts, and calculated staffing values.

# Staffing Build Wizard

## Overview

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.

Note: 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.

To build staffing data:

1. On the Scenario Staffing View toolbar, click the Build button.

    The Staffing Build Wizard's first screen, Provide Budgeting and Overhead Data, opens.
2. Fill in the Provide Budgeting and Overhead Data window and then click **Next.**

    The screen that appears next depends on what kind of activity you are staffing.

- For an Immediate activity (work activities that are handled by agents immediately, such as voice calls), the Specify Service Level Objectives screen opens if you selected the Use Service Level Objectives check box. If you did not select Use Service Level Objectives, the Staffing Requirements screen opens.
- For a Deferred activity (backlog activities, such as e-mail, that use special forecasting calculations), the Multimedia Service Level Objectives screen opens.
- For a Fixed-Staff activity (non-CTI activities that do not use Workforce Management service objectives), the Staffing Requirements screen opens.

**3.** Fill in the screens that open and then click **Finish**.

The wizard closes. If you selected **Compare results with previous** on the first wizard screen, the Scenario Build Results window opens. If not, the Scenario Staffing View opens.

## Provide Budgeting and Overhead Data

Use the provide budgeting and Overhead Data screen to specify target dates, hours and wage data, overhead factors, and whether to use service-level objectives. An example completed screen is shown below.

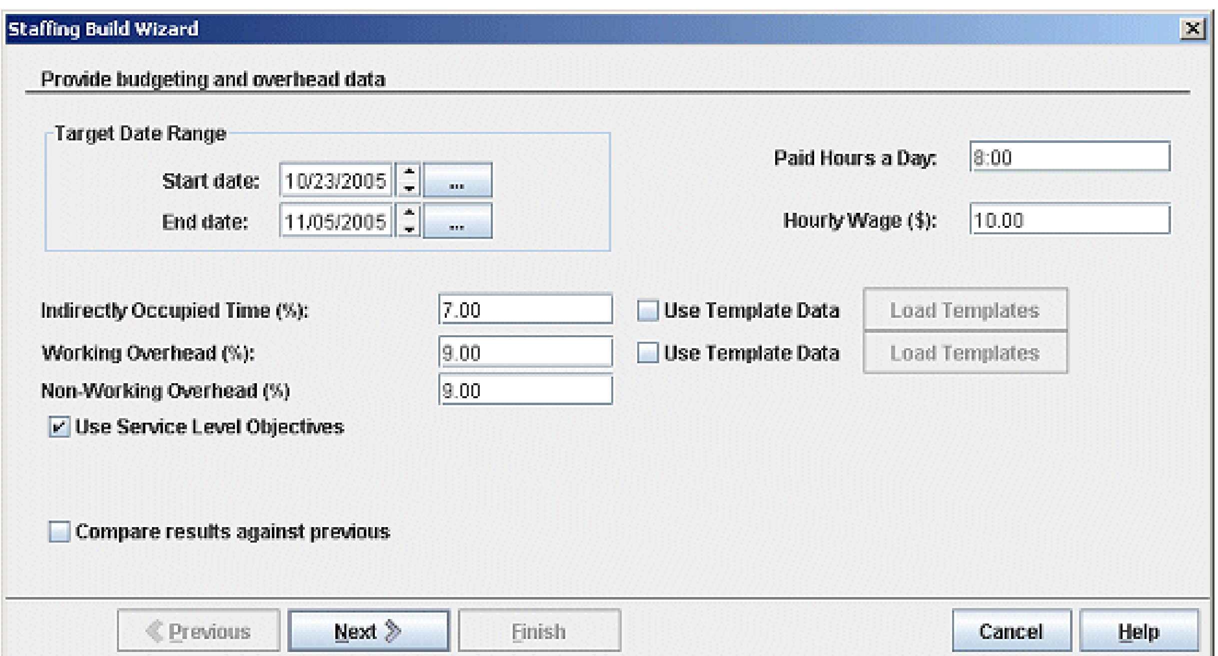


Figure 15: Staffing Build Wizard, Provide Budgeting and Overhead Data

1. 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.
2. Select a Target Date Range.
3. If this staffing forecast covers single-site activities, fill in the Paid Hours a Day and Hourly Wage ($) data to the right. These fields are not present when building a staffing forecast using multi-site activities.
4. If this staffing forecast covers single-site activities, fill in the Working Overhead % and Non-Working Overhead % data at the lower left, if applicable. These fields are not present when building a staffing forecast using multi-site activities.

   You can select Use Template Data and click Load Template to load an existing template.
5. Click **Next** to open the wizard's next screen.

The following sections provide details about the fields on this screen.

### Hours and Wage Data

**Paid Hours a Day—**This value should be calculated from the average number of hours that all agents in the site worked per day.

For example, consider a contact center with a 5-day week that uses 10 full-time agents who work 40 hours per week and 10 part-time agents who work 30 hours per week. The paid hours per day is calculated as follows: 10 x 40 = 400 hours; 10 x 30 = 300 hours; 300 + 400 = 700 hours; 700 hours divided by 5 days equals 140 hours per day; and 140 hours divided by 20 agents equals an average workday of 7 hours.

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Note: WFM uses the value in the Paid Hours a Day field as part of its Full Time Equivalent definition. The FTE values for each day at the top of the columns (under **Calc.** and **Req.**) in the Scenarios Staffing View are partially based on what you configure for Paid Hours a Day.

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**Hourly Wage—**This value is calculated similarly to Paid Hours a Day.

For example, if 10 agents are paid $9.00/hour, 7 are paid $8.00/hour, and 4 are paid $11.00/hour, the hourly wage is calculated as follows: 10 x $9.00 = $90.00; 7 x $8.00 = $56.00; 4 x $11.00 = $44.00; 90 + 56 + 44 = 190; $190.00/hour divided by 21 agents = $9.05/hour average hourly wage.

### Overhead Data

For Indirectly Occupied Time and Working Overhead, you can either enter a percentage directly or load it using a template. For Non-Working Overhead, you must directly enter the percentage.

- **Indirectly Occupied Time—**Percentage of time that agents are scheduled for work but are not being productive. For example, agents might be away from their desks or starting their computers. For more information, see Special Note below.
- **Working Overhead—**Percentage of time that agents are not handling calls or performing direct contact center work. For example, an agent might be taking a break, participating in a training session, or meeting with peers or supervisors. For more information, see Special Note below.
- **Non-Working Overhead—**Percentage of time in the schedules that agents are being paid but are not working. For example, an agent may be on vacation, out sick, or on holiday. For more information, see Special Notes below.

### Use Service-Level Objectives

Select this check box to enable the Specify Service Level Objectives screen, later in the wizard.

### Special Notes on Overhead Data

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 he will be off the phone).

Working Overhead (WO) or Non-Working Overheard (NWO) do not directly affect your intra-day staffing forecast results. Because of this, you may not want to enter values for each activity.

- The value you enter for WO will affect the FTE calculation (the value that appears at the top of each column in the staffing forecast when viewed at weekly granularity and in the grid when viewed at Monthly or Yearly granularity).
- The value you enter for WO will not affect the intra-day staffing forecast results.
- The value for NWO will not affect the FTE calculation.

If you estimate values for both WO and NWO, however, you will then be able to compare the Actual overheads in schedules against the Plan. The Actual Overhead Report will show whether the following was in line with the Plan:

- The actual time that the agents were not on calls, but were working (such as time in meetings or trainings).
- The actual time that the agents were not on calls and were not working (such as when they are on time off or full-day exceptions).

WO or NWO do not affect intra-day staffing requirements. This is because they get built into the schedule in the form of pre-planned items from the WFM Calendar (such as time off and some exceptions), as well as pre-planned Shift items (such as meals and breaks). Of course, there will always be some overheads that cannot be planned for. Run the Actual Overhead Report to see the percentage of WO and NWO in the schedules that was not anticipated in advance.

## Specify Multimedia Service Level Objectives

Use the Specify Multimedia Service Objectives screen to define service level objectives when you are building staffing volumes for a Deferred staffing activity, such as responding to e-mails.

1. Fill in the percentage target for **% of Deferred Work in**. Enter a value in one of the following fields.
   - **Hrs**
   - **Min**
   - **Sec**
2. As an alternative, select **Use Service Level Template**.
3. If you select Use Service Level Template, click **Load Template** to load an existing template.
4. Click **Finish**.

## Staffing Requirements

Use the Staffing Requirements screen 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** in order to load an existing template.
2. 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 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 up in WFM Configuration Utility) has one or more associated activities (existing activities set up in WFM Configuration Utility). After building calculated and required staffing for a multi-site activity, you can then use this wizard to split the result between associated activities.

Note: The Staffing Split Wizard is available only within a Forecast Scenario. You must add a multi-site activity to the forecast scenario in order 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.

Note: 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.

5. Click **Next.**

   The wizard's second screen, Select Activities within Multi-site Activity, opens.

6. Select the local (target) activities into which you want to split the multi-site activities.

   You can select several target activities.

   - If you selected **Use AHT Forecast** on the first screen, then you cannot select target activities that do not have at least one timestep with at least one AHT value greater than zero.
   - If you select **Use All Activities**, when WFM splits staffing data, 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.

7. Click **Next**.

   **Split Required Also** is checked by default, If checked, when WFM splits staffing data, the required staffing of the selected multi-site activities is split to activities using the same proportions as when splitting calculated staffing.

   The wizard's third screen, Specify budgeting and overhead data, opens.

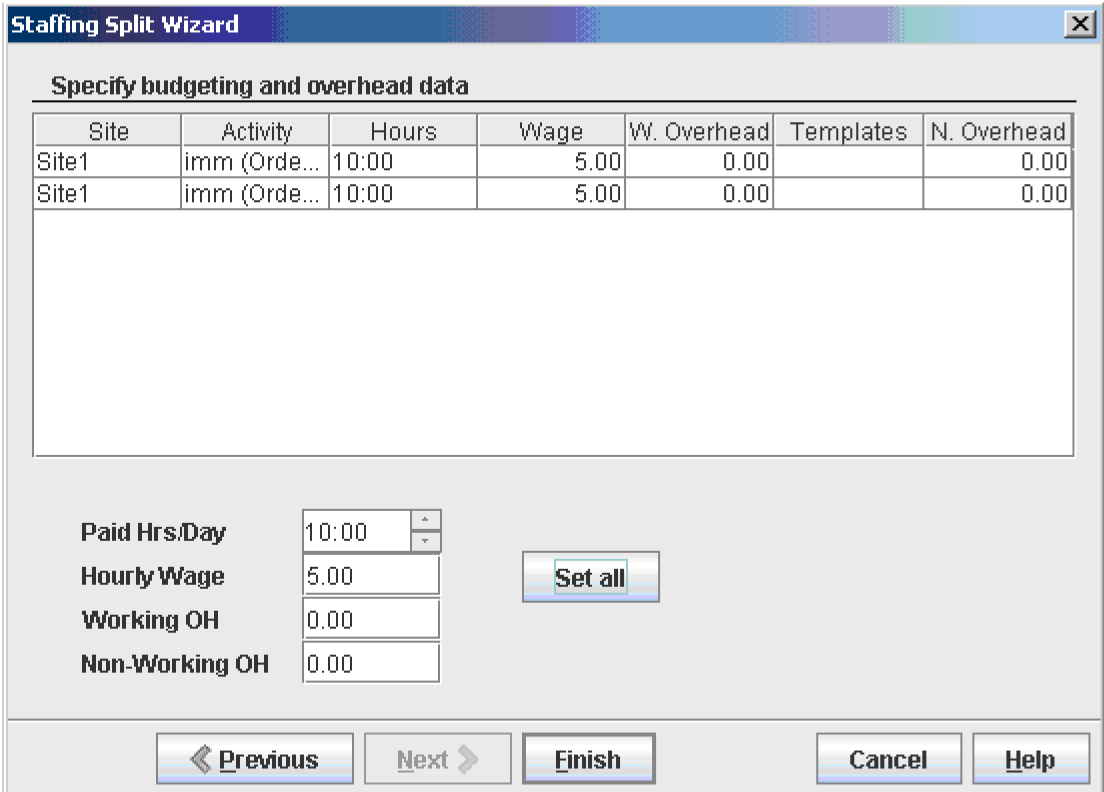


**Figure 16: Staffing Split Wizard, Specify budgeting and overhead data**

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 field below the table)
- **Wage** (corresponds to the Hourly Wage field below the table)
- **W. Overhead** (corresponds to the Working OH field below the table)
- Templates
- **N. Overhead** (corresponds to the Non-Working OH field below the table)

8. To change an individual value, click on a number inside an **Hours**, **Wage**, **W. Overhead**, or **N. Overhead** cell of the table, and type a new value.

   To change all values in a column of the table at once, click inside the corresponding field 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 box while it splits the activities. Click this box's **Cancel** button 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.

The following sections cover:

- Displaying the Graphs view
- Setting the dates, statistics, and granularity
- Reading the graph and legend
- Modifying and managing scenario data

## Displaying the Graphs View

To display the Graphs view:

1. In the Forecast Scenarios view, select a scenario.
2. In the Modules tree, click [**Scenario-name**] **Graphs**

   The Graphs view appears.
3. In the Objects tree, select an activity.

A default graph appears, which you can now customize.

## Setting the Dates, Statistics, Period, and Granularity

Use the Target Date, Show Statistics, Period, and Granularity controls (near the top) to customize the graph:

- Select a Start date within the forecast scenario's date range, using the standard date-selection controls.
- Use the Show Statistics drop-down list to select which statistics you want to graph: Interaction Volume, AHT (average handling time), Interaction Volume and AHT, Calculated Staffing, Required Staffing, Calculated and Required Staffing, or Calculated and Multi-skilled Calculated Staffing.
- Use the Period drop-down list to choose whether to view data for a Year, Month, Week, or Day.
- Use the Granularity drop-down list to select the time interval for the graph's horizontal axis: Monthly, Weekly, Daily, 60 min (minutes), 30 min, or 15 min. The choices that are available vary, depending on the Period that you selected.
- Click Filter to further customize the graph.

### 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):

**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 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.

**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.

Note: 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 that are 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 cover:

- 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. 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.**

> Warning! 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.

## 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

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, select the Start date and End date.

   These fields define what 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. Use the date-selection controls to adjust the dates. You cannot select dates outside the original scenario dates.

   Note: The scenario and target start dates occur on the same day of the week.
4. In the Target Dates section, select the Start date and End date.

   These 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. Use the date-selection controls to adjust the dates.

   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.
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. You can 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**.

### 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, select the Start date and End date.

   These 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. Use the date-selection controls to adjust the dates.

4. In the Target Dates section, select the Start date and End date.

   These 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. Use the date-selection controls to adjust the dates. For an existing scenario, you cannot select dates outside the scenario's original date range.

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. You can expand Business Units to display their sites and you can expand sites to display their activities. You can select multiple activities from different sites.

6. Click **Finish**.

# Graph View Options

## Overview

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.

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.

Note: 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.

# Interaction Volume

Use the Options dialog box to customize a Forecast Graphs view whose Show Statistics drop-down list is set to Interaction Volume:

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. 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.

3. 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 Values—**When selected, graphs display numeric values for each granularity period.

**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.

# 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. 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.

3. 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 Values—**When selected, graphs display numeric values for each granularity period.

**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.

# 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 boxes for the options that you want to have displayed in the graphs. 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.

3. 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 Values—**When selected, graphs display numeric values for each granularity period.

# 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

## 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 the current *Workforce Management Administrator's Guide*, Chapter 1: “Overview” for a discussion of Multi-Skilled Forecasting and a description of how to enable Multi-Skill support.

If the Multi-Skill option is not configured, then you will still see Mutli-Skill Equivalents in the graphical view, but they will be the same as Calculated Staffing in Single-Skill Equivalents.

To bring up the dialog box:

**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. 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.

**3.** 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 Values—**When selected, graphs display numeric values for each granularity period.

**Show Secondary Graph—**If you select a radio button other than None in this panel, 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 forecasted service level.

**Avg Speed of Answer Objective**—The requirement for Average Speed of Answer (ASA) as defined when creating the forecast.

**Avg Speed of Answer**—The forecasted Average Speed of Answer (ASA).

**% of Abandons Objective**—The requirement for the percentage of interactions abandoned, as defined when creating the forecast.

**% of Abandons**—The forecasted percentage of interactions abandoned.

**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 forecasted maximum time that a logged-in agent will be handling interactions.

**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 forecasted interaction volume.

**Agent Hours***—The number of agent hours that are needed to handle the interaction volume.

*Omitted from the list of options, if you selected **Use multi-site activity** for any target in the object tree.

# Overlays

NEW! Beginning with WFM 7.6.1, you can create and configure overlays in the Forecast module of WFM Web for Supervisors. Overlays perform the function of factors (which were previously defined and configured in Configuration Utility). Overlays help you track events that may affect interaction volume. For example, use an overlay to include in your forecast the anticipated effect of a sales promotion or a marketing campaign.

## Getting Started

Prerequisite: You must have the security permission Events which is assignable using

- WFM Configuration Utility (User Security > Modules > Forecasts > Events) before you can create or configure overlays or access the action Find Events in the Historical Data Volumes View.
- 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 in 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 in the Object pane.

A table in the Data pane lists all current overlays.

**2.** Click on a overlay to select its entire row.

**3.** Select a command from the Actions menu, or an icon from the toolbar:

## Toolbar controls

**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 the Edit (   ) button.
- 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

**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 that the overlay will be in effect. The actual increment (Day or Hour) is configured in Spread.
  - Distribution Value   Displays the distribution value for each increment. The default value in each cell is zero.
- 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: zero (the default) and positive numbers.
  - **Ending Impact** field—Use this field to specify the ending impact of the overlay. Range: zero (the default) and positive numbers.

### 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. Range is 0 or any positive value.

**Disregard Historical Data**—Select this check box if the event should disregard historical data. Clear the check box to consider historical data.

#### Events Controls

- Click the Add Event button to add a new row to the grid, with default values in the cells.
- Click the Delete Event button to delete the selected event from the grid.
- Click Cancel or Save to perform those functions.

## New Overlay Wizard

Use the New Overlay Wizard to create a new overlay.

1. Open the Forecast module and select Overlays in the modules area.
2. Select a Business Unit or Site in the objects area.
3. Click the New icon 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.

The New Overlay Wizard opens and displays these pages, in order: Properties, Usage, Impact, Impacted Activities.

## Properties 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:

- **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).

## Usage Page

The New Overlay Wizard opens and displays these pages, in order: Properties, Usage (this page), Impact, Impacted Activities.

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.

The settings on this page are:

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.

## Impact Page

Note: This page appears only if you selected the radio button Calculate Using The Specified Initial and Ending Impact on the Usage page.

The New Overlay Wizard opens and displays these pages, in order: Properties, Usage, Impact (this page), Impacted Activities.

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.

The settings on this page are:

Impact parameters of overlay fields

Initial Impact field

Use this field to specify the initial impact of the overlay. Range: zero (the default) and positive numbers. Enabled only if the option Calculate Using Specified Initial and Ending Impact is selected.

Ending Impact field

Use this field to specify the ending impact of the overlay. Range: zero (the default) and positive numbers. Enabled only if the option Calculate Using Specified Initial and Ending Impact is selected.

## Impacted Activities Page

The New Overlay Wizard opens and displays these pages, in order: Properties, Usage, Impact, Impacted Activities (this page).

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.

# Forecast Templates

## Overview

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

Note: 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.

## List View

Use the Forecast Templates List view to create, edit, and delete forecast templates.

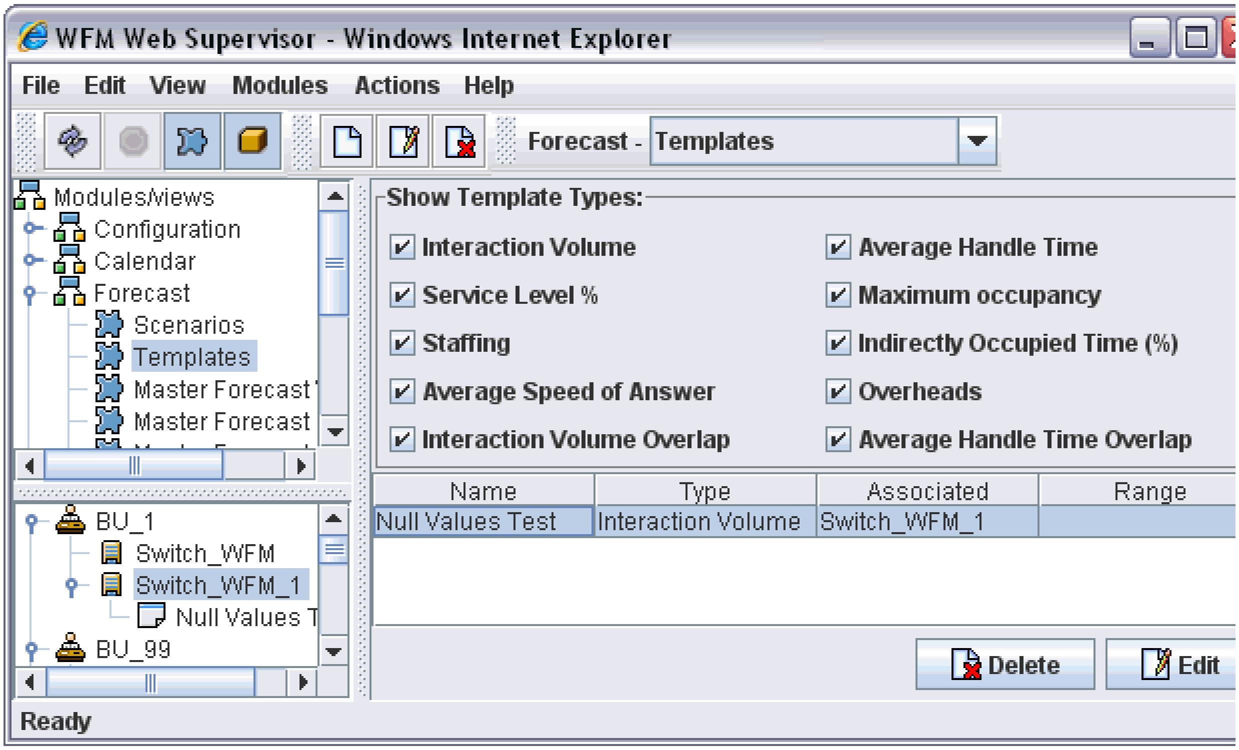


**Figure 17: Forecast Templates List view**

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 panel 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. 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. Use the vertical scroll bar on the right to display more activities.
2. Click **Save** to save your changes to the template's activities.

## New Forecast Template Dialog Box

Use the New Forecast Template dialog box to create a new template.

1. Click the New button on the Forecast Templates List view toolbar.

   The New Forecast Template dialog box appears.
2. Enter a Name for the new template.
3. Use the Associated drop-down list to select the site for which you are building this template.
4. Select the template type from the Type drop-down list. See below for a list of template types.
5. If you want to use settings from a previously configured template, select that template from the Based On drop-down list.
6. Enter a number in the Initial Value text box.

   The *initial value* 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. See Template Properties: Data for details.

   WFM Web interprets the Initial Value setting 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).
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.**

Your new forecast template is now available in the Forecast Templates List view.

## Forecast Template Types

**Interaction Volume—**Number of interactions per timestep.

Note: 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 above note.

**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.

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 Box

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.
2. From the Associated drop-down list, select the site to which you want this template associated.
3. From the Type drop-down list, select the template type.

> Note: The Based on drop-down list and the Initial Value text box are disabled. You cannot alter their default entries.

4. Select the Start date and End date.

   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 the Activities that you want to be associated with this template.
6. Click **OK.**

The new forecast template now appears in the Forecast Templates List view.

# Master Forecast Views

## Master Forecast Overview

You can open the following Master Forecast views from Modules tree's Forecast branch

**Master Forecast Volumes View**—Enables you to view the Master Forecast's interaction volumes.

**Master Forecast Staffing View**—Enables you to view the Master Forecast's calculated and required staffing.

**Master Forecast Graphs View**—Displays your choice of statistics for the Master Forecast, using line charts.

## Master Forecast Volumes View

Use the Volumes view to display the Master Forecast's interaction volumes. An example view is shown below. Click a toolbar button on the image below to jump to its description.

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 grid properties and date range.

- Using the grid.
- Cleanup and use multi-site activities.

## Displaying the Volumes View

To display the Volumes view:

**1.** In the Modules tree, click **Master Forecast Volumes.**

**2.** In the Objects tree, select an activity.

Statistics populate the grid.

## Setting the Grid Properties and Date Range

Use these options in the Grid properties and Date range panels (not shown in partial view above, but at top right) to customize the grid:

- The grid displays data for a period of a year, month, planning period, or week. To change the period, click Year, Month, Planning Period, or Week from the Period drop-down list to change the time range shown on each row.
- If you select Week, you can further adjust each row's time range by selecting a Granularity of 15, 30, or 60 minutes.
- Show columns, or hide them, by selecting or clearing (respectively) the Volume, Volume %, and AHT check boxes.
- Use the standard date-selection controls to jump to a different week within the Master Forecast's date range.

## 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 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

You can use the following buttons on the toolbar (these commands also appear in the Actions menu)

**Cleanup—**Opens the Cleanup Master Forecast window, where you can remove information from the Master Schedule 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.

## Master Forecast Staffing View

Use the Staffing view to display the Master Forecast's calculated and required staffing. An example view is shown below. Click a toolbar button on the image below to jump to its description.

This view provides standard date-selection controls and a grid that shows staffing levels for days or timesteps.

The following sections cover:

- Displaying the Staffing view.
- Setting the grid properties and date range.
- Using the grid.
- Save as Template, Cleanup, and Calculation Options.

### Displaying the Staffing View

To display the Staffing view:

1. In the Modules tree, click **Master Forecast Staffing.**

   The Staffing view appears as shown above.
2. In the Objects tree, select an activity.

Statistics populate the grid.

### Setting the Grid Properties and Date Range

Use these options in the Grid properties and Date range panels (near the top) to customize the grid:

- The grid displays data for a period of a year, month, planning period, or week. To change the period: click Year, Month, Planning Period, or Week on the Period drop-down list. Your selection changes the time range shown on each row. (WFM Web prompts you to save any unsaved edits before refreshing 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.
- Show columns, or hide them, by selecting or clearing (respectively) the Calc or Req check boxes.
- Use the standard date-selection controls to jump to a different week within the Master Forecast's date range.

## 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 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):

**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 unit, or enterprise in the Objects tree.

## Master Forecast Graphs View

Use the Graphs view to display Master Forecast data in a line chart. An example view is shown below. Click a toolbar button on the image below to jump to its description.

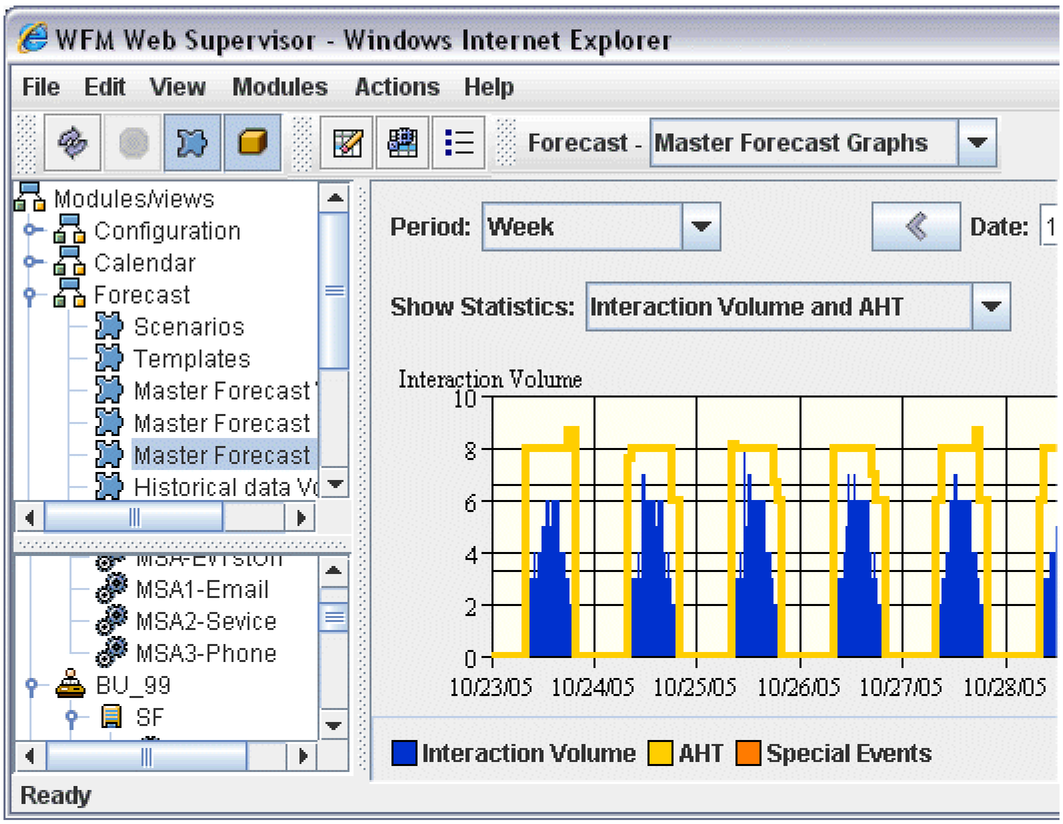


**Figure 18: Master Forecast Graphs View**

The following sections cover:

- Displaying the Graphs view.
- Setting the dates, statistics, and granularity.
- Reading the graph and legend.
- Cleanup, Calculation, and Options.

### Displaying the Graphs View

To display the Graphs view:

1. In the Modules tree, click **Master Forecast Graphs.**

2. In the Objects tree, select an activity.

A default graph appears, which you can now customize.

## Setting the Dates, Statistics, Period, and Granularity

Use the Target Date, Show Statistics, Period, and Granularity controls (near the top) to customize the graph:

- Select a Start date within the Master Forecast's date range, using the standard date-selection controls.
- Use the Show Statistics drop-down list to select which statistics you want to graph: Interaction Volume, AHT (average handling time), Interaction Volume and AHT, Calculated Staffing, Required Staffing, or Staffing Calculated and Required, or Calculated and Multi-skilled Calculated Staffing.
- Use the Period drop-down list to choose whether to view data for a Year, Month, Planning Period, Week, or Day.
- Use the Granularity drop-down list to select the time interval for the graph's horizontal axis: Monthly, Weekly, Daily, 60 min (minutes), 30 min, or 15 min. The choices that are available vary depending on the period that you selected.

## Reading the Graph and Legend

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):

**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.

**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 the Options button on the toolbar**.**

One of the following versions of the Options dialog box opens, depending on the statistic that you selected.

**Table 1: Master Forecast Graph Options**

| Statistic Selected | 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 (using the WFM Database Utility).

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

## Overview

You can open the following Historical Data views from Modules tree's Forecast branch:

**Historical Data Volumes View**—Displays interaction volumes for historical data that has either been imported into WFM or collected automatically by WFM Data Aggregator.

**Historical Data Graphs View**—Displays your choice of statistics, using line charts, for historical data that has either been imported into WFM or collected automatically by WFM Data Aggregator.

Click a branch in the Modules tree to open the corresponding view. (Or use the Views toolbar's Scenarios drop-down list to move among these views.)

## Historical Data Overview

You can open the following Historical Data views from Modules tree's Forecast branch:

**Historical Data Volumes View**—Displays interaction volumes for historical data that has either been imported into WFM or collected automatically by WFM Data Aggregator.

**Historical Data Graphs View**—Displays your choice of statistics, using line charts, for historical data that has either been imported into WFM or collected automatically by WFM Data Aggregator.

Click a branch in the Modules tree to open the corresponding view. (Or use the Views toolbar's Scenarios drop-down list to move among these views.)

# 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.

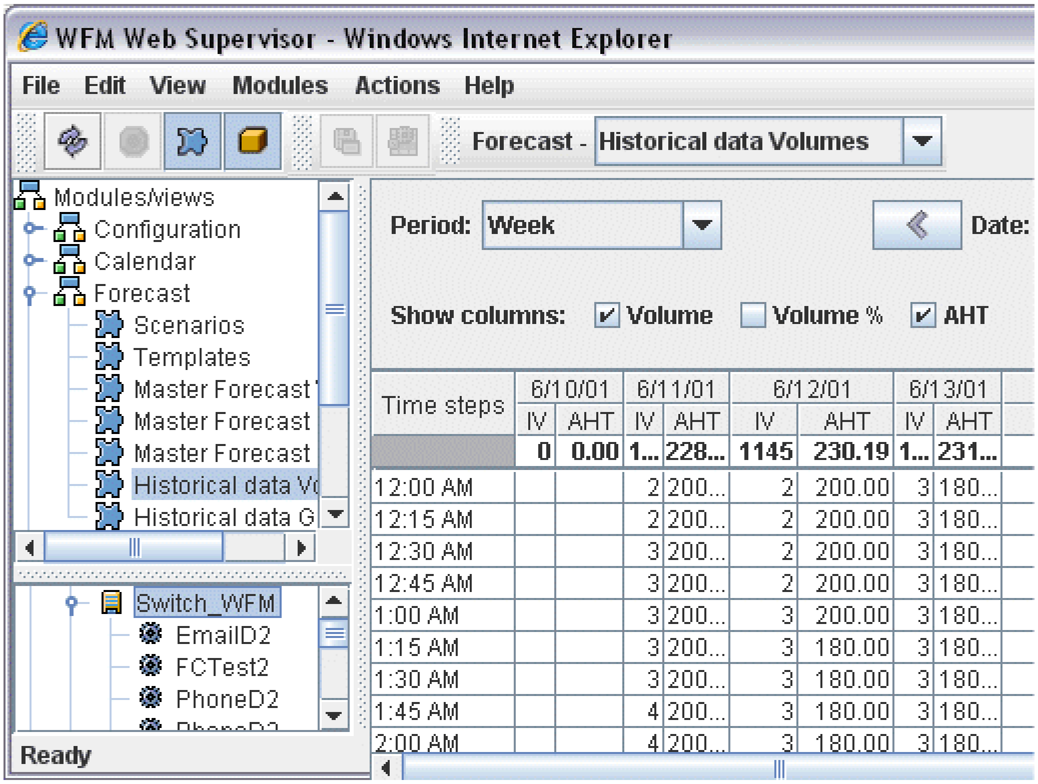

**Figure 19: Historical Data Volumes View**

The following sections cover:

- Displaying the Volumes view.
- Setting the grid properties and date range.
- Using the grid.
- Save and calculation options.

## Displaying the Volumes View

To display the Volumes view:

1. In the Modules tree, click **Historical Data Volumes.**

   The Volumes view appears.

2. In the Objects tree, select an activity.

Statistics populate the grid.

## Setting the Grid Properties and Date Range

Use these options in the Grid properties and Date range panels (near the top) to customize the grid:

- The grid displays data for a period of a year, month, or week. To change the period, click Year, Month or Week from the Period drop-down list to change the time range shown on each row.
- If you select Week, you can further adjust each row's time range by selecting a Granularity of 15, 30, or 60 minutes.
- Show, or hide, columns by selecting or clearing (respectively) the Volume, Volume %, and AHT check boxes.
- Use the standard date-selection controls to jump to a different week within the historical data's date range.

## 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 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.

Note: 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):

**Save as template**—Opens the Save as Template Wizard, where you can save historical data as a forecast template.

Note: 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.

## Historical Data Graphs View

Use the Graphs view to display historical data in a line chart. An example view is shown below. Click a toolbar button on the image below to jump to its description.

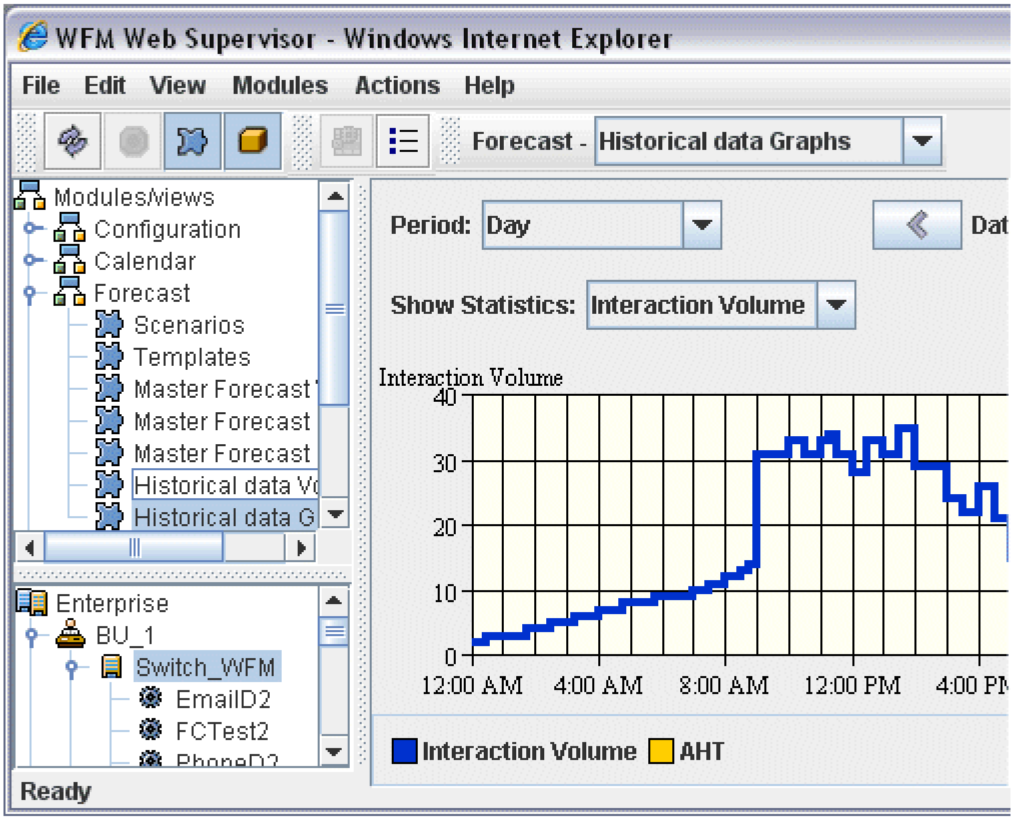


**Figure 20: Historical Data Graphs View**

The following sections cover:

- Displaying the Graphs view.
- Setting the dates, statistics, and granularity.
- Reading the graph and legend.
- Calculation and filtering options.

## Displaying the Graphs View

To display the Graphs view:

1. In the Modules tree, click **Historical Data Graphs.**

   The Graphs view appears.

2. In the Objects tree, select an activity.

A default graph appears, which you can now customize.

### Setting the Dates, Statistics, Period, and Granularity

Use the Target Date, Show Statistics, Period, and Granularity controls (near the top) to customize the graph:

- Select a Start date within the imported or collected historical data's date range, using the standard date-selection controls.
- Use the Show Statistics drop-down list to select which statistic you want to graph: Interaction Volume or AHT (average handling time).
- Use the Period drop-down list to choose whether to view data for a Year, Month, Week, or Day.
- Use the Granularity drop-down list to select the time interval for the graph's horizontal axis: Monthly, Weekly, Daily, 60 min (minutes), 30 min, or 15 min. The choices that are available vary, depending on the period that you selected.
- Click the Options button on the Actions toolbar to further customize the graph.

### Reading the Graph and Legend

The graph shows the statistics, dates, period, and granularity that you selected. The vertical axis indicates the units shown. When graphing multiple statistics, the right and left vertical axes display different units (where necessary) 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 select. Special events appear as markers on the graph.

### Calculation and Filtering Options

You can use the following buttons on the Actions toolbar (these commands also appear in the Actions menu)

**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.

**Options—**Opens the Options dialog box, where you can select/de-select Show Values.

## Options for Historical Data Graphs

Use the Options dialog box to customize the display of the Historical Data Graphs view:

1. Select a statistic from the Show Statistics drop-down list.

2. Click **Options** on the toolbar**.** The Options dialog box opens.
3. Select or de-select **Show Values**.

Based on your selection, WFM refreshes the Historical Data Graphics view.

## Supervisors Help Options

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, e-mail, 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.

## 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 the Modules tree for that scenario: Scenario Volumes View, Scenario Staffing View, and Scenario Graph View.

- 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. You import historical data using the WFM Configuration Utility.

- 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.

Chapter

# 5 Scheduling

This chapter covers the following topics:

# Overview

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.

---

Note: 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.

## 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 may have full access to all parts of the Schedule module or you may have limited access, depending on the settings configured for your Security Role in the WFM Configuration Utility.

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-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 the WFM Configuration Utility 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.

Note: 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 activate the Scenarios view:

- In the Modules tree, click **Schedule > Scenarios**.

# Using Other Scenario Views

When you open a scenario, the following views appear in the Modules tree for that scenario: Coverage view, Weekly view, Intra-Day view, Agent-Extended view, Profiles/Bidding view, and Summary view.

To open a view:

- Click the view.

The same view options appear on the Views toolbar's Scenarios drop-down list.

Opening additional scenarios adds their view options to these lists. You can switch among views for 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 the Modules tree's Schedule branch always displays five Master Schedule views (regardless of your Scenario selections): Master Schedule Coverage View, Master Schedule Weekly View, Master Schedule Intra-Day View, Master Schedule Agent-Extended view, and Master Schedule Summary View. A sixth view, the Master Schedule Changes Approval view, will only be displayed if you have the permission to Approve Changes in WFM Configuration Utility.

To open these Master Schedule views:

- Click the view.

# 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 publicly-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 View

Use the Schedule Scenarios View to create a new scenario or open an existing schedule scenario. The figure below shows an example.

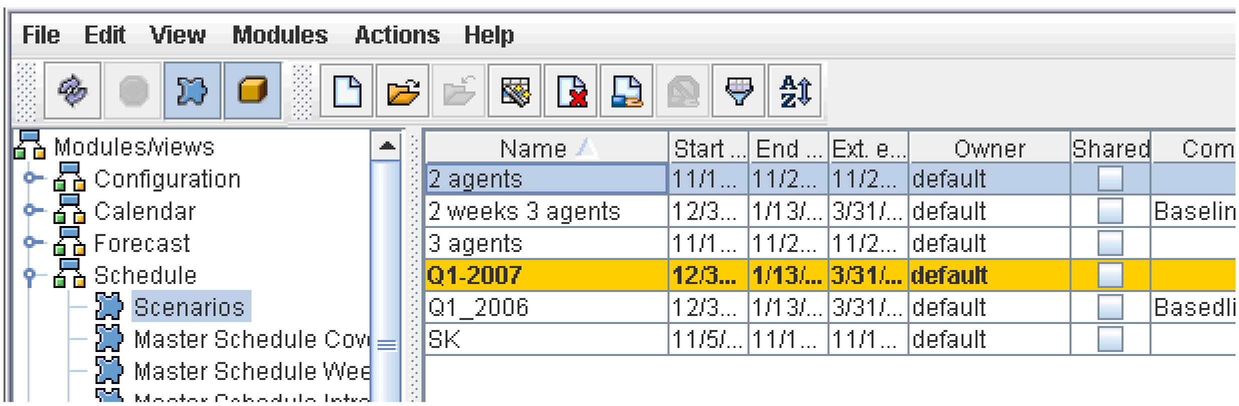


**Figure 21: Schedule Scenarios View**

You can select the following views in the Modules tree for an open scenario:

**Scenario Coverage View**—Compares staffing coverage to forecasted (calculated and required) staffing data, and highlights overstaffed or understaffed timesteps.

**Scenario Weekly View**—Displays a weekly summary table of total paid hours, working start/end times, or shift names for a site's agents and/or profiles.

**Scenario Intra-Day View**—Displays schedule details for a 24- or 36-hour period, enabling you to modify schedules for individual or multiple agents.

Note: 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 Coverage, Weekly, and Intra-Day views.

**Scenario Agent-Extended View—**Displays schedules for one week or the schedule planning period for a single agent.

**Scenario Profiles/Bidding View—**Enables you to assign real agents to profile schedule slots.

**Scenario Summary View—**Displays service-level and related statistics for the scenario.

**Scenario State Group Totals—**Presents Schedule Group Totals for Schedule Groups configured.

To open a view, click a branch in the Modules tree. (Or use the Views toolbar's Scenarios drop-down list to move among these views.)

If you open other scenarios, their views also appear in Modules tree and in the Scenarios drop-down list.

To remove a scenario's views from these controls:

- Close that scenario.

# Schedule Scenarios View

Use the Scenarios view to open and work with existing schedule scenarios. This view enables you to create, edit, or delete schedule scenarios, and to publish scenarios to the Master Schedule.

The following sections cover:

- Displaying the Scenarios view.
- Reading the Scenarios table.
- Editing a scenario.
- Creating and managing scenarios.
- Scenario properties—The Data tab.
- Scenario properties—The Statuses tab.

## Displaying the Scenarios View

To activate the Scenarios view:

- In the Modules tree, click **Schedule** > **Scenarios**.

### Selecting Objects

When the Scenarios view is active, the Objects tree displays existing schedule scenarios in a hierarchical list. You can expand the All Scenarios node to display 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 Configuration Utility help topic, Schedule Security Options.

**Other Scenarios**—Displays (if you have appropriate access rights) unshared scenarios created by other users.

You can select All Scenarios or a lower-level option.

To select an option:

- Click the option. Your selection retrieves the matching scenarios and insets them into 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) 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.

Note: 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 Scenario Properties 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):

**New**—Opens the New Schedule Scenario Wizard.

**Open**—Opens the selected scenario from the Scenarios table. You can then edit its properties using the Data tab.

**Close**—Closes the open scenario (and prompts you to save unsaved data).

**Publish**—Opens the Publish Schedule 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.

**Filter**—Displays the Statuses Filters dialog box, which you can use to control which Statuses are displayed. These Statuses are described below.

**Sort**—Opens the Sorting dialog box, which allows sorting by Team Name, Contract, Agent Name (first or last), or Agent Rank. 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.

## Scenario Properties—Data Tab

To display the following controls:

- Click the Data tab on the Scenario Properties pane at the lower right.

**Name**—Enables you to edit the scenario's name.

**Start date, End date**—Displays the scenario's start and end dates.

**Extended End date**—Specifies an extended end date for a bidding scenario, to specify that the schedule you are building will apply by repeating over a longer range of time.

**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 your changes, restoring the scenario's previous name and/or comments.

### 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

## Overview

Use the New Schedule Scenario Wizard to create a new schedule scenario:

1. On the Schedule Scenarios view toolbar, click the New button.

   The first of the New Schedule Scenario Wizard's screens, General Parameters, opens.

2. Fill in the necessary information on each screen, and then click **Next.**

   Clicking **Help** on any screen opens a Help page that explains that screen's options.

   Clicking **Previous** 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.

## General Parameters

To fill in the first New Schedule Scenario Wizard screen, General Parameters:

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 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.

   Note: If the WeekStartDay setting has been specified in the WFM Configuration Utility, 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 the scenario's end date. The maximum time between Start date and End Date is 42 days (6 weeks).

Note: 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 the scenario's extended end date, if necessary.

   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.

   Note: 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. Click **Next** to proceed to the next screen.

## Select Activity

To fill in the second New Schedule Scenario Wizard screen, Select Activity:

1. Select all activities that you want to include in this schedule.

   In the **Activities** list, you can expand business units to display their sites and expand sites to display their activities. You can select any number of activities.

   If you selected an existing scenario from the General Parameters screen's Based On drop-down list, the Activities list shows only those activities that were pre-selected in the source scenario.

   Note: You can add activities later, but you can add them only for the sites that you select now, on this screen.

2. Click **Next** to proceed to the next screen.

## Select Agents

To fill in the third New Schedule Scenario Wizard screen, Select Agents:

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 Activity screen.

2. For each selected agent, select **Real** or **Profile**.

   Selecting one of these check boxes clears the other check box.

   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. One reason to use profile agents is when you create a bidding scenario. See the topic Configure Scheduling Scenario in the Schedule Bidding section.

   If agents in General Parameters screen's Based On scenario were Real, then Real check box is pre-selected for them; if Profile agents, then the Profile check box is pre-selected.

3. If you want to fill the new scenario with the schedules from the source (Based on) scenario, select the Copy Schedules check box.

4. 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. You can insert multiple items.

   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.

5. To have WFM place profile agents (which are based on real agents) into the same team as real agents, select the **Place profile agents, based on real agents, into their teams** check box.

6. Click **Next** to proceed to the next screen.

## About Scheduling with Profiles

*Profile agents* are “generic” agents that you create by omitting preferences and exceptions. 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 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.)

### Select Profile

To fill in the final New Schedule Scenario Wizard screen, Select Profile:

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 Activity 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.

### Select Profile vs. Select Agents

Here is the difference between the profiles on this screen, and the profiles on the previous screen.

On the previous Select 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 Select Profile 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 may include any combination of real agents, profile agents, and profiles.

## Scenario Coverage View

Use the Scenario Coverage view to compare a schedule's staffing coverage with the forecast (calculated and required) staffing data. The figure below shows an example Scenario coverage view when the Chart Type is **Required**. 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.

The following sections cover:

- Displaying the Scenario Coverage view.
- Using the Daily graphs and tables.
- Reading the Totals table.

- Customizing the Scenario Coverage view.
- How understaffing and overstaffing are calculated.

## Displaying the Scenario Coverage View

To display the Scenario Coverage view:

1. In the Schedule Scenarios view, open a scenario.
2. In the Modules tree, click [**Scenario-name**] **Coverage.**
3. In the Objects tree, you can select business units (if any are listed), multi-site activities, sites, activity groups, or activities.

You can select a single business unit, a single site or a single multi-site activity within a business unit, a single 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 dropdown 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:

**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.

Note: 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 within a single site. The figure below shows the view after selecting a specific team in the Objects tree.

Note: 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.

The following sections cover:

- Displaying the Scenario Weekly view.
- Using the table.
- Customizing the Scenario Weekly view.
- Modifying the schedule.

## Displaying the Scenario Weekly View

To display the Scenario Weekly view:

1. In the Schedule Scenarios view, open a scenario.
2. In the Modules tree, click **[Scenario-name] Weekly.**
3. In the Objects tree, select a site, teams, and/or agents.

   You can expand business units to display their sites, and expand sites to display their teams and agents. You can work with only one site at a time, but you can select any number of agents and/or teams within that site.

   If profile agents were created for this site during schedule building, these profiles appear within a Profiles team.
4. 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:

**[Expand/Collapse]—**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.

**Team—**This column lists each agent's or profile's team.

**Agent—**Two columns show an icon representing this agent's or profile's contract, and then the agent's or profile's name.

**[Week Start Dates]—**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.

**[Weekdays]—**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 a 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 that have not yet been committed to the scenario.

Note: If there have been multiple changes, the icon represents the most recent status.

**Weekly Totals—**Shows each agent's or profile's total paid hours for the displayed week.

**Long (Planning) Period Totals—**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 WFM Configuration Utility's Policies > Contracts > Contracts General tab.

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.

**Note:** If the WeekStartDay setting has been specified in the WFM Configuration Utility, 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.

**Working Start/End Time—**Start and end times of agents' work.

**Shift Names—**Names of agents' assigned shifts.

### Mode

Select 1 Week or Planning Period from the Mode drop-down list. The table displays data for the selected period. The Planning Period option is disabled if no schedule planning period was configured in the WFM Configuration Utility.

**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 column.

**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:

**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.

**Re-build intra-day schedule**—Opens the “Intra-Day Schedule Rebuild Wizard” on page 243 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 column.

**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), or Agent Rank. 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—**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.

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 View check box, data is also shown in a table.

You can modify schedule items for individual agents or profiles here, and you can insert schedule items for multiple agents and/or profiles.

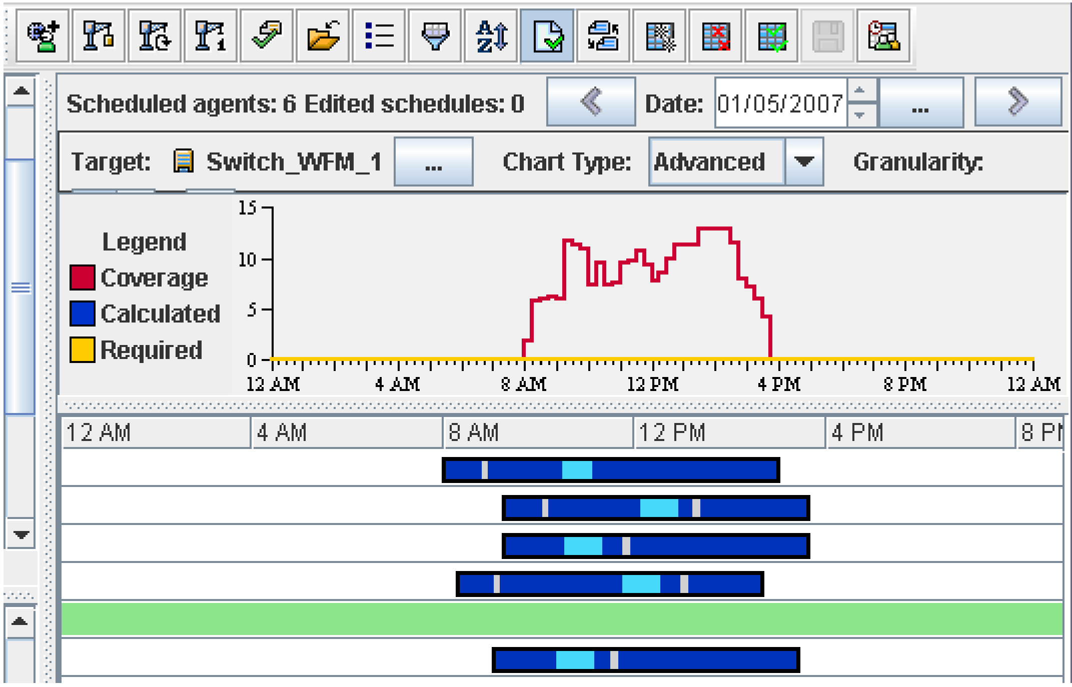


**Figure 22: Schedule Intra-Day View**

## Displaying the Intra-Day View

To display the Intra-Day view:

1. In the Schedule Scenarios view, open a scenario.
2. In the Modules tree, click **[Scenario-name] Intra-Day.**

   The Scenario Intra-Day view appears.
3. In the Objects tree, select a site, teams, and/or agents.

   You can expand business units to display their sites, and expand sites to display their teams and agents. You can work with only one site at a time, but you can select any number of agents and/or teams within that site.
4. Open the Select Target window and select a Performance Data Target.

   By default no performance target is selected for the Intra-day schedule view, and performance data cannot be displayed without one selected. See Performance Data Target.
5. Click **Get data** to display the Intra-Day performance graph (if you have opted to view it) and the schedule grid.

### 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 team, agent, contract, start time, paid hours, overtime, shift start time, and total hours, by clicking on the header for that column.

**Full View—**Select the Full View check box to have the intraday grid display the entire day. If you clear this check box, the grid shows a more detailed view.

**Options—**Enables you to customize the view by selecting options that cover agent availability, 24-hour or 36-hour display, marked time, performance data, and whether to display or hide the Overtime, Paid Hours, Total Hours, Start Time, and Comment columns. For more information, see the Options Dialog Box topic.

**Scheduled agents—**This indicator 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.

**Date—**These controls are standard date selectors.

**! (Save Messages/Warnings)—**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.

**Team—**This column indicates each agent's assigned team.

**Agent—**This column indicates each agent's name.

**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.

**[Timesteps]**—These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the Full View check box and/or resize the columns.

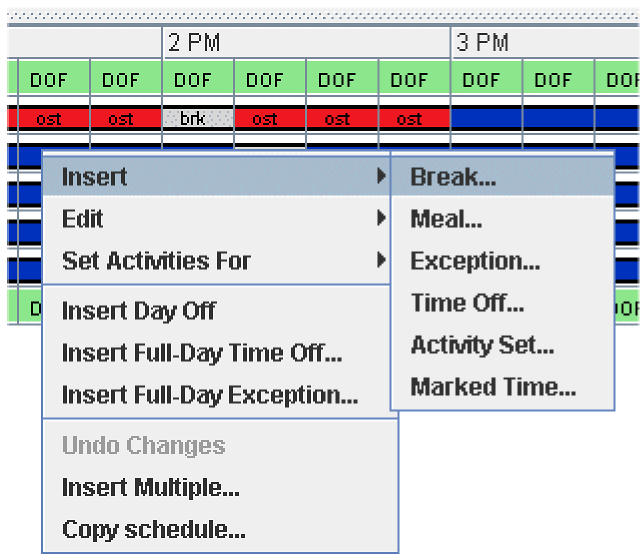


**Figure 23: Timestep shortcut menu**

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 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**—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 the Getting Started Overview.

### Search for an Agent

To find a specific agent in the Scenario Intra-Day view:

1. You can 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 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:

**Auto-Commit—**This button toggles on and off the auto-commit feature. 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.

**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.

**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" on page 243 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 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.

**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, 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.

**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.

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.

## 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 Scenario Intra-Day display.

Note: The table appears only if you clear the Full View check box.

To configure the performance data views:

1. Select a target for the performance data by clicking the ellipsis (...) button next to the **Target:** label. The list that appears contains both the activities associated with the site selected on the Objects pane and the multi-site activities associated with the current scenario. 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 (appears on the graph in blue), Required (appears on the graph in

yellow), or Advanced (both Calculated and Required; appears on the graph as a blue area for the calculated staffing and as a yellow line showing the required staffing). By default, the graph shows Calculated staffing.

- The table always displays values for schedule coverage and calculated staffing. It may show additional figures, depending on your selections on the Performance tab of the Options dialog box.

If you are not using automatic updates, click the **Refresh Performance Data** button 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 in Configuration Manager. See the “Enabling Multi-Skill Support” section in the current *Workforce Management Administrator's Guide*.

## Performance Data Target

To view performance data in the Master Schedule or 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 open the Select Target window:

- Click **Target...** on the Schedule Intra-Day view window.

Note: 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.

### Your Site Selection Determines the Local Time Zone

When you select a site in the object pane (for example, San Francisco), you are also specifying the local time that is applied to the grid and graphs that you view when you request performance data. In this example, schedules and whatever you select to view would be displayed in San Francisco's Pacific 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 in 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.

## 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 for the appropriate agent.

Note: 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 discards your changes and close the dialog box.

Note: 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 that is generated when you first save the schedule scenario may continue to be regenerated when you save your comments if the schedule continues to contain the problems that were noted in the warning.

## Master Schedule Intra-Day View 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.

To open the Options dialog box:

- Click the Options button on the Actions toolbar or select **Options** from the Actions menu.

The Options dialog box appears.

- When called from an Intra-Day view, it has three tabs: Options, Performance, and Columns.
- When called from an Agent-Extended view, it two tabs: Options and Columns.

Each tab is described below. After you are done configuring the Options dialog box, click **Apply** 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 leftmost column (labeled “!”) for every Agent who meets these conditions.

   Note: 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 one of his preferences, 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.

Note: You see the table only if the Full View check box is *not* selected.

In addition to scheduled coverage and calculated staffing, which always appear, you can select any or all of the following 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 ASA (Average Speed of Answer)

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: Overtime, Paid Hours, Total Hours, Start Time, 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 View 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—**Displays the team to which this agent belongs.

**Agent—**Displays the agent whose schedule generated this message.

**Message—**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.

**Undo—**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.

**Cancel—**Closes the dialog box without saving or refreshing data.

Note: 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.

To use this wizard:

1. Click the Add/Remove Scenario Elements button on a schedule scenario view's Actions toolbar or select it from the Actions menu.

   The first of the Add//Remove Scenario Elements Wizard's three screens, Select Activities, opens.

2. Make whatever changes you want to the schedule scenario's activities.

   You can expand business units to display their sites and you can expand sites to display their activities. The tree shows only those sites that the scenario included when it was created.

   By default, activities included in the selected scenario are selected in the tree, and you cannot clear their check boxes.

   To add activities to the scenario, select their check boxes.

3. Click **Next.**

4. On the Select Agents screen, make whatever changes you want to the schedule scenario's agents.

   You can expand business units to display their sites and you can expand sites to display their agents. The tree shows only those sites that were included in the scenario when it was created.

   By default, those agents who were originally included in the scenario are selected in the tree.

   To add an agent to the scenario:

   Select the agent's Real or Profile check box. (You can select only one check box for each agent, and selecting one check box automatically clears the other.)

   To remove an agent from the scenario:

   Clear both of the agent's check boxes.

5. Click **Next.**

6. In the Select Profiles window, make whatever changes you want to make to the number of profile agents.

You can expand business units to display their sites and expand sites to display their profiles. For each profile, you can edit the Number column's entry (which is initially zero).

7. Click **Finish** to save your changes to the schedule scenario.

Or you can click **Previous** to review or change your selections in earlier windows, or **Cancel** to close the wizard without modifying the scenario.

## 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. The figure below shows an example.

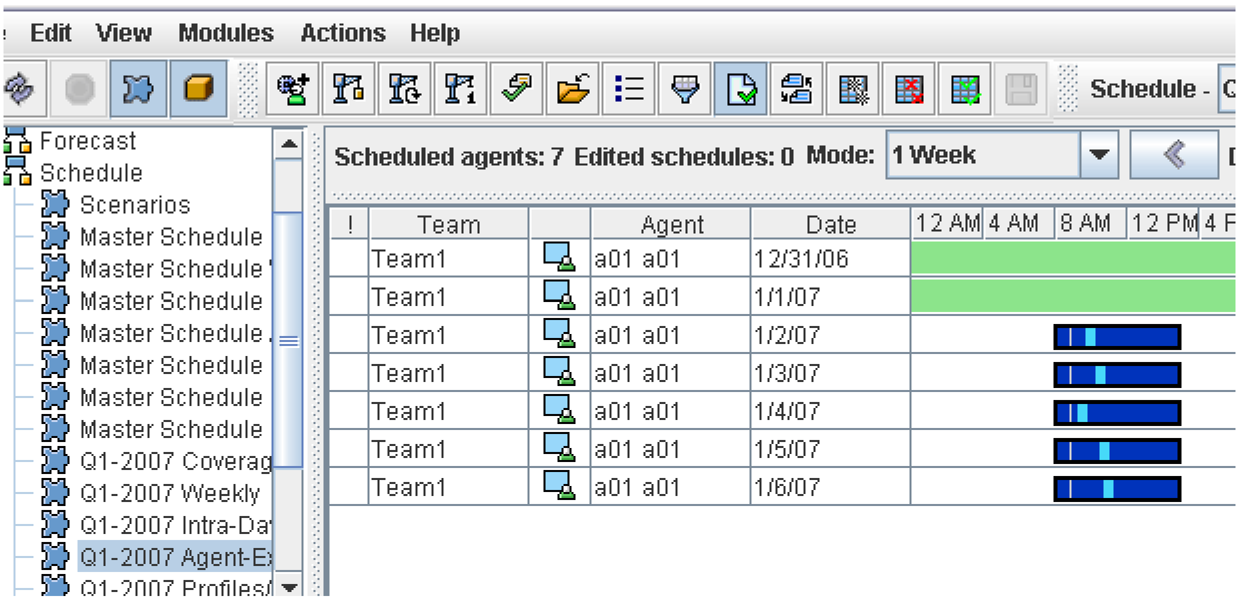


**Figure 24: Scenario Agent-Extended View**

Note: 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 here, and you can insert schedule items for multiple agents and/or profiles. The following sections and links cover:

- Displaying the Agent-Extended view.
- Using the Agent-Extended view grid
- Customizing the Agent-Extended view grid.
- Using the Agent-Extended view toolbar buttons.
- Modifying an agent's schedule.

## Displaying the Scenario Agent-Extended View

To display the Agent-Extended view:

1. In the Modules pane, expand the Schedules module.
2. Click **Scenarios**.
3. In the Schedule Scenarios view, open a scenario.
4. In the Modules tree, click **[Scenario-name] Agent-Extended.**

   If already accessed during the current session, the Agent-Extended view appears with the last selected agent.

   If accessed for the first time, an empty Agent-Extended view grid appears. The Objects tree displays the business unit/site(s)/team(s) associated with the selected scenario.
5. Expand the Objects tree and select a single agent. You can work with only one agent at a time. The Scenario Agent-Extended view appears.

## 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 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 View—**Select the Full 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 in the example above. Full 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 used 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)—** 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. This icon, assigned in Configuration Utility, 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.

**[Timesteps]**—These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the Full View check box and/or resize the columns.

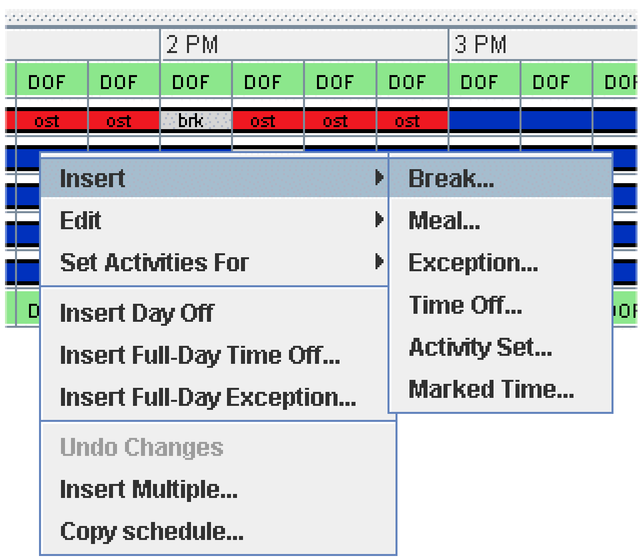


**Figure 25: Timestep shortcut menu**

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 on a 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 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.


**Figure 26: Scenario Agent-Extended View Legend**

## Customizing the Scenario Agent-Extended View Grid

You can resize the Team, Agent, and Date columns. For details, see the Getting Started Overview. You can also add and remove columns.

**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**—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.

## 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:

**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.

**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" on page 243 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, and Comment 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 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.

**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.

# Scenario Profiles/Bidding View

Use the Scenario Profiles/Bidding view to assign agents to a schedule that you have created using profiles. The figure below shows an example (partial view). Click the toolbar buttons on the image to jump to their descriptions below. Bidding controls and tools are described at the bottom of this topic.

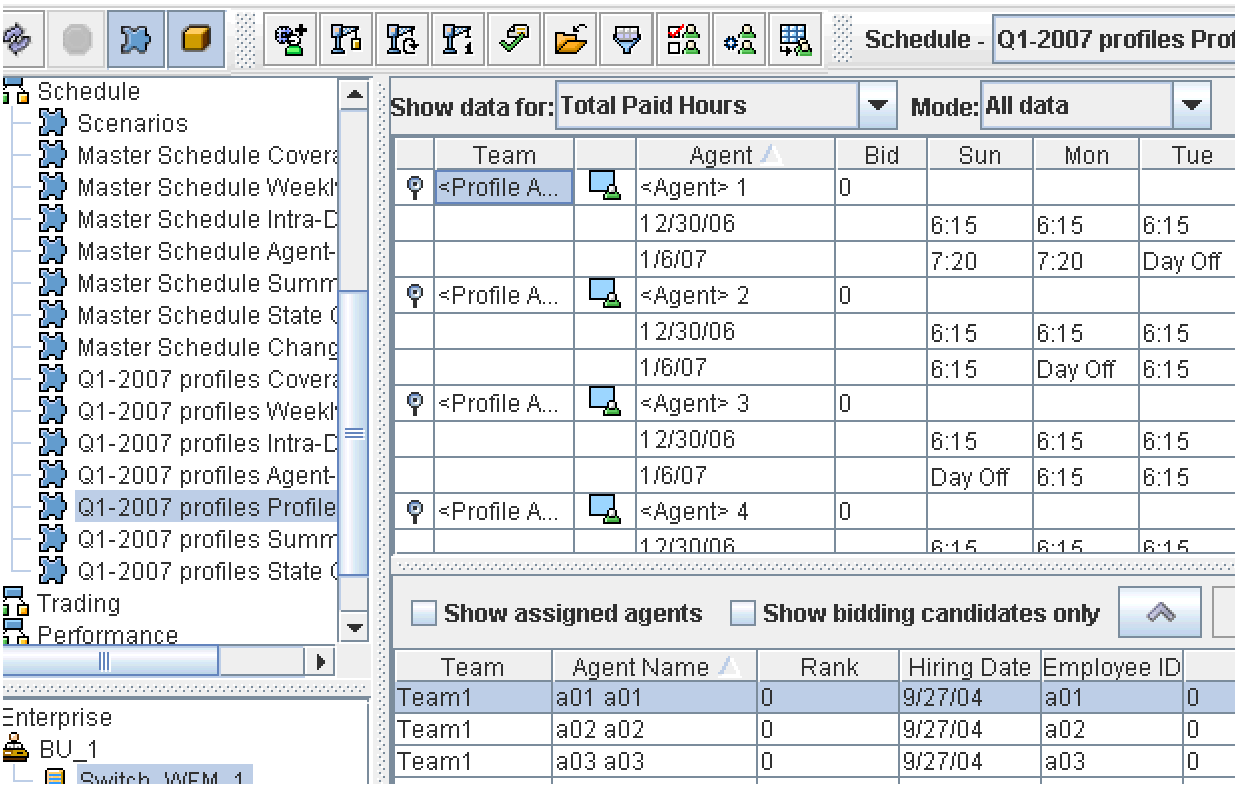


**Figure 27: Scenario Profiles/Bidding View**

## Using Profile-based Scheduling for Bidding Scenarios

The WFM offers Schedule Bidding view offers controls that 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.

The following sections cover:

- Displaying the Scenario Profiles/Bidding view.
- Reading the tables.
- Using the tables.
- The Show Data For drop-down list.
- Filter, build, validate, and save options.

## Displaying the Scenario Profiles/Bidding View

To display the Scenario Profiles/Bidding view:

1. In the Schedule Scenarios view, open a scenario.
2. In the Modules tree, click [**Scenario-name**] **Profiles/Bidding.**

   The Scenario Profiles/Bidding view appears.
3. In the Objects tree, select a site and/or profiles.

You can expand business units to display their sites and expand sites to display their profiles. You can work with only one site at a time, but you can select any number of profiles within that site. 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:

—Click this icon to shrink a multiple line listing down to a single line. Click again to expand the listing back to multiple lines.

**Team**—The assigned team of the agent on this row.

—This icon represents the agent's contract, and is assigned in Configuration Utility.

**Agent**—Shows a contract icon and index, with expand/collapse controls to display or hide schedule details in the Week column.

**Bid**—The agent's bid ranking number for this schedule

**[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, Hire Date, and Employee ID.

Each row displays information for one agent. Each agent listed meets all the requirements imposed by the check boxes Show Assigned Agents and 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.

To save changes:

- Click **Save.**

To discard all of the assignments that you have made:

- Click **Close** and then decline the prompt to save before closing.

**Show Data for**

Use this drop-down list to select what you want to display inside each day's table cell:

**Total Working Hours—**Total working time for the day. (Default display option.)

**Working Start/End Time—**Start and end times of agents' work.

**Shift 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):

**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).

**Filter—**Enables you to filter the displayed contract types and activities.

**Bidding Candidates Selection—**Opens the Bidding Candidates Selection 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.

### 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**

**Bidding Candidates Selection—**Opens the Bidding Candidates Selection dialog, where you specify which Agents can bid on the current bidding scenario.

**Control Bidding Process—**Use this wizard to specify the dates and times when bidding begins and ends.

**Auto-Assign Schedules—**Use this wizard to automate the assignment of profile shifts to real agents, after bidding has closed.

All other icons and modules are described in the Scenario Intra-Day View and the Scenario Agent-Extended View.

**Check boxes**

- **Show assigned agents** displays real agents and their assigned shifts in the grid above, only if the schedule was originally created using agent profiles. Otherwise selecting has no effect.
- **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 checkbox.
  - When you use this view for profile-based scheduling, clear the checkbox.

You can select both check boxes at once, as shown in the graphic.

### 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.

# Scenario State Group Totals

Use the Scenario State Group Totals view to display coverage statistics for every time step in a selected day.

## Displaying State Group Totals

1. Select a Scenario.
2. Select State Group Totals for that scenario, under the Schedule module.
3. Select the object—Switch(es), Team(s), Agent(s)—whose State Group Totals you want to work display.
4. Click Get data.

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. Use the State Groups Filter in the toolbar to specify which columns appear in the table and which lines appear in the graph.

### Data Tab

Click the Data tab to view to view the data in a table.

- The group columns are ordered with the highest weight displayed in the left-most column of the grid.

Note: 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 he is in each state group. For example, an agent 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.

### Graph Tab

Click the Graph tab to view the data in a stacked area 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.

### State Groups Filter Dialog Box

Reach this dialog by clicking the Filters button in the toolbar at the Scenario States Groups Totals module.

Use the State Groups Filters dialog box to control which State Groups are displayed:

1. Select the check boxes for State Groups that you want to display. By default, all State Groups are selected for display.
2. Clear the check boxes for any State Groups that you want to hide.
3. You can select the State Groups 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. 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.

## Scenario Summary View

Use the Scenario Summary view to display statistics about the current schedule scenario. The Summary view provides standard date-selection controls and two clickable tabs, Data and Graph. The following sections cover:

- Displaying the Scenario Summary view.
- Data tab.
- Graph tab.
- Actions toolbar.

### Displaying the Scenario Summary View

To display the Summary view:

1. In the Schedule Scenarios view, open a scenario.
2. In the Modules tree, click **[Scenario-name] Summary.**

   The Scenario Summary view appears.
3. In the Objects tree, select sites and/or activities.

You can select a single business unit, a single site within a business unit, or a single activity within a site. Making the selections populates the Data tab 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`.

### Data Tab

The Data tab 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.

**Time Step—**The start time for each 15-minute timestep.

**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 he 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 forecasted.

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.

**Difference Service Level—**Service Level Scheduled minus Service Level Forecasted

**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.

**Difference Interaction Volume—**Interaction Volume Scheduled minus Interaction Volume Forecasted

**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.

**Difference AHT—**AHT Scheduled minus AHT Forecasted

Budget Scheduled—The budget for the scheduled coverage for the selected day and activities, 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.

**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.

**Difference Budget—**Budget Scheduled minus Budget Forecasted

**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. This column appears if selected in the Options dialog box.

**Difference Calculated—**The difference between Coverage [Scheduled] and Staffing Calculated. This column appears if selected in the Options dialog box.

**Difference Required—**The difference between Coverage [Scheduled] and Staffing Required. This column appears if selected in the Options dialog box.

**Coverage Published—**The schedule coverage based on the “baseline” Master Schedule.

**Coverage Difference—**The difference between the schedule coverage based on the “current” Master Schedule and schedule coverage based on the “baseline” Master Schedule.

**ASA Scheduled—**The Average Speed of Answer that you *should* achieve with the number of scheduled agents.

**ASA Forecasted—**The Average Speed of Answer that you *should be able to achieve* with the number of agents from the staffing forecast.

**Difference ASA—**ASA Scheduled minus ASA Forecasted

**Occupancy Scheduled—**The Occupancy that you *should* achieve on this activity, with the number of agents currently scheduled.

**Occupancy Forecasted—**The Occupancy objective that you *should be able to achieve* when staffing with the number of agents from the staffing forecast.

**Difference Occupancy—**Occupancy Scheduled minus Occupancy Forecasted

### Graph Tab

The Graph tab 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 tab's available columns (except that Difference Calculated and Difference Required cannot be graphed).

**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).

### Using the Actions Toolbar

Use buttons on the toolbar (or commands from the Actions menu) for the following:

**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.

**Close—**Closes the open scenario (and prompts you to save unsaved data).

**Options—**Opens the Options dialog box for enabling or hiding individual statistics.

The following statistics are 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.

**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.

# Schedule Filter Dialog Box

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 Activities Agents Have Skills For list, select the check boxes for activities that you want to display. Clear the check boxes for any activities that you want to hide.

   By default, all activities are selected.

4. In the Contracts list, select the check boxes for contracts that you want to display. Clear the check boxes for contracts that you want to hide.

   By default, all contracts are selected.

5. Click the Schedule States tab.
6. If you are in the Weekly, Intra-day, or Profiles/Bidding module, this tab contains the Activities Agents Work On list. Select the check boxes for activities that you want to display. Clear the check boxes for any activities that you want to hide. By default, all activities are selected.

   OR

   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 groups are selected.

7. 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 Box

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. 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.

# Options Dialog Boxes

## Summary View Options Dialog Box

Use the Options dialog box to customize the statistics that the Summary view displays.

1. Click the Options button 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.

   Display or hide all statistics at once by selecting or clearing (respectively) the Statistics node's check box.
3. Click **OK.**

The Summary view reappears, displaying only the statistics that you selected.

### Coverage Statistics

Starting with Workforce Management 7.2, you have the option to include two new Coverage statistics in the Summary view:

**Coverage Published** displays the schedule coverage based on the “baseline” 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 can include these new 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 can include these new statistics in the Summary view:

**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).

**Occupancy Scheduled** displays the Occupancy that you should achieve on this activity, with the number of agents currently scheduled.

**Occupancy Forecasted** displays 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]** displays (Occupancy Scheduled minus Occupancy Forecasted).

For in-depth descriptions of these statistics and the formulae used to derive them see “Appendix B: Metrics” in the current *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.

## Weekly View Options Dialog Box

Use the Options dialog box to configure the data that is shown on the Weekly view or Master Weekly view.

To open the Options dialog box:

Click the Options button on the Actions toolbar

OR

Select Options from 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.

Note: 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 the Rank check box to add a column to the Weekly View grid that displays an agent's Rank value (which is set in the WFM Configuration Utility).

# Sorting Dialog Box

Use the Sorting dialog box to sort the Weekly or Intra-Day 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), or Agent Rank. 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**—Team Name, Contract, Agent Name (first or last), Overtime, Paid Hours, Total Hours, Shift Start Time, or Start Time of First Exception.

Note: 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.

2. 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.

# Swap Agent Schedules Wizard

Use the Swap Agent Schedules Wizard to swap the schedules of two agents in the same schedule scenario:

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 no agent is selected, 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 where you opened it.

# 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:

**Agent**—The agent whose action(s) generated this message.

**Team**—The team to which the agent belongs.

**Message**—The message type (either Warning or Error), numeric code, and the message text.

**OK**—Closes the dialog box and retrieves fresh data from the server.

**Help**—Displays this help topic.

# Insert Multiple Wizard

## Overview

Use the Insert Multiple Wizard 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.

To use the Insert Multiple Wizard:

1. In Intra-Day or Agent Extended view, select **Insert Multiple** from one of the following:
   - Actions toolbar
   - Actions menu
   - Shortcut menu

Insert Multiple is also available in Weekly view from the Actions toolbar or Actions menu.

If you have unsaved changes, WFM Web prompts you to save them before proceeding.

The Insert Multiple Wizard's first screen, Select Agents, opens.

**2.** Select the agents whose schedules you are editing.

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Note: If 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.

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If using one of the Scenario views, this checkbox is always enabled.

**3.** Click **Next.**

**4.** Select the dates in which to insert items, and then click **Next.**

**5.** On the Select State Type screen, select a state, and then click **Finish** (for a Day Off) or **Next** (for other schedule items).

**6.** Fill in the Select Break, Select Meal, Select Exception, or Select Time Off screen that appears next, and then click **Finish**.

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.

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.

## Select Agents Screen

To fill in the Select Agents screen:

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.

   Note: If schedule validation errors also occur, WFM Web does not insert any of your 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.

3. Click **Next** to open the Select Dates screen.

Click **Cancel** if you want to close the wizard without saving your selection.

## Select Dates Screen

The select dates screen 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.

Note: If you are inserting into 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.

## Select State Type Screen

To fill in the Select State Type screen:

1. Select the state that you want to insert.
2. Click **Finish** or **Next.**

The button that is enabled depends on the state that you have selected:

- The Finish button is enabled if you selected Day Off. Clicking it inserts a day off on the selected dates for the selected agents and closes the wizard.
- If you select any other state, the Next button is enabled. Click it to open the appropriate wizard screen for selecting breaks, meals, exceptions, or time off.
- If you want to review or change your entries on the Select Dates screen, click **Previous**. Or click **Cancel** if you want to close the wizard without saving your selection.

## Select Shift Screen

To fill in the Select Shift screen:

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 screen.

## Select Activity Set Screen

To fill in the Select Activity Set screen:

1. Select the check box next to each shift that you want to insert.
2. Click **Finish**.

## Select Break Screen

To fill in the Select Break screen:

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.)
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.The list shows all of the breaks that have been configured for the selected site in the WFM Configuration Utility. 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.
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 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.
4. 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 screen, click **Previous.**

If you want to close the wizard without inserting the break, click **Cancel.**

## Select Meal Screen

To fill in the Select Meal screen:

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 the WFM Configuration Utility. 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 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.
4. 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 screen, click **Previous.**

If you want to close the wizard without inserting the meal, click **Cancel.**

## Select Exception Screen

To fill in the Select Exception screen:

1. Select an exception from the Select Exception list. Click a single row to select its exception. (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.)

   The list shows all of the exceptions that have been configured for the selected site in the WFM Configuration Utility. The list's columns show each exception's full name, its short name, whether it is paid, whether it counts as time off, whether the exception is convertible to a day off, and whether it is a full-day exception.

   Note: 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 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.
4. 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 screen, click **Previous.**

If you want to close the wizard without inserting the exception, click **Cancel.**

## Select Time Off Screen

To fill in the Select Time Off screen:

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 WFM Configuration Utility. The list's columns show each time-off type's name, short name, whether or not the time off is paid, and whether the time off counts toward the configured time-off limits.

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 7.6 Administrator's Guide.

Note: 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 starts on the day after the agents' shifts begin. Or select **Next Day** next to the End Time text box if the time-off begins on the same day as the agents' shifts begin, but ends on the day after.
4. 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.
5. 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 screen, click **Previous.**

If you want to close the wizard without inserting the time off, click **Cancel.**

## Review Messages Dialog Box

Use the Review Messages dialog box 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 checkbox 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.

**Message—**Displays the message type (either Warning or Error), and the message text itself.

**Select All Warnings—**Marks the check box for all Warnings.

**Repeat Insert—**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.

Note: 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.

# Delete Multiple Wizard

## Overview

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 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.

   The Delete Multiple Wizard's first screen, Select Agents, opens.

2. Select the agents whose schedules you are editing.

   Note: 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.

3. Click **Next.**

4. 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.

5. In the Select State Types screen, select one or more states. Then click **Next** (for other schedule items).
6. Fill in the Select Breaks, Select Meals, Select Exceptions, or Select Time Off 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.

## Select Agents Screen

To fill in the Select Agents screen:

1. Select any combination of agents.

   You can select individual agents from multiple teams, or you can select whole teams or the whole site. However, you can select only within the site for which you displayed the Agent-Extended, Intra-Day, or Weekly view.
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.

Note: 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 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.

## Select Dates Screen

The Select Dates screen 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.

   Note: 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.

Note: Any item that overlaps the dates and times selected will be deleted, even if it overlaps by as little as a minute.

## Select State Types Screen

To fill in the Select State Types screen:

1. Select the state or states that you want to delete. You can delete breaks, meals, exceptions, and/or time off.
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, and Select Time Off.

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.**

## Select Breaks Screen

To fill in the Select Breaks screen:

1. Select a break or 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 Configuration Utility. The list's columns show each break's full name, short name, how long it lasts, and whether the break is paid. You cannot select or clear the Paid check box here.

2. If you selected to delete meals, exceptions, or time off, 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.**

## Select Meals Screen

To fill in the Select Meals screen:

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 Configuration Utility. 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. If you selected to delete exceptions or time off, 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.**

## Select Exceptions Screen

To fill in the Select Exceptions screen:

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 exceptions, hold down the Ctrl key while you select. To de-select, continue holding Ctrl and click the exception(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 WFM Configuration Utility. 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, and whether it is a full-day exception.

Note: The check boxes simply indicate the exception's configured properties. You cannot select or clear them here.

2. If you selected to delete time off, 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.**

## Select Time Offs Screen

To fill in the Select Time Offs screen:

1. Select one or more time-off types from the Select Time Off 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 time-off type(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 WFM Configuration Utility. The list's columns show each time-off type's full name, its short name, whether it is paid, and whether it counts toward the configured time-off limits.

Note: The check boxes simply indicate the time-off type's configured properties. You cannot select or clear them here.

2. 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.**

# Commit/Rollback Multiple Wizard

## Overview

Use the Commit/Rollback Multiple Wizard 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.

Note: 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 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 making changes to the Master Schedule does have permission to “Approve Changes,” but turns off the Auto-Commit icon.
3. The user is working with a schedule scenario and turns off the Auto-Commit icon.

   In all cases, the user must click the Save button in order 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. If, however, 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**.**

To use the Commit/Rollback Multiple 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 Agents, opens.
2. Select the agents whose pending changes you want to commit or roll back.
3. Select whether to commit or roll back pending changes.
4. Click **Next.**
5. In the Select Dates screen, select the dates for which to save or delete pending items, then click **Finish**.

The view reappears.

## Select Agents Screen

To fill in the Select Agents screen:

1. Select any combination of agents.

You can select individual agents from multiple teams, or you can select whole teams or the whole site. However, you can select only within the site displayed in the Agent-Extended, Intra-Day, or Weekly view.

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 screen.

Click **Cancel** if you want to close the wizard without saving or deleting pending changes.

## Select Dates Screen

The Select Dates screen 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.

> Note: If you are working with a schedule scenario, you cannot select dates that fall outside of 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 screen, click **Previous.**

Or, if you want to close the wizard without saving your selection, click **Cancel.**

# Modify Individual Agents' Schedules

## Overview

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. The following sections cover:

- Using shortcut menus.
- Inserting full-day schedule items.
- Modifying full-day exceptions, days off, and full-day time off.
- Modifying shifts.
- Inserting and editing shift items.
- Moving and resizing shift items.
- Committing or rolling back pending changes.

## 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 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).

**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.

## Modifying Shifts

Once 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.

## 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, Marked Time, or Activity Set. Use the resulting dialog box 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 a Work 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.

Note: 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.

**Commit—**When 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.

Note: 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.

Note: An error message appears 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: 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.)

### Moving a Shift Item

To Move a Shift Item

Note: If you want 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

To Resize a Shift Item

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Note: If you want to resize the shift itself, hold down the Ctrl key throughout the first two steps.

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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.

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Note: If do not have the Approve Changes security permission enabled, you cannot select Commit.

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## 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.

   Click any timestep for any agent who does not have a scheduled shift.
2. From the shortcut menu that appears, select **Insert Shift.**

   The first of the Insert Shift Wizard's two screens, Select Shift, opens.
3. In the Choose Item to Insert list, click a shift row to select it.

The list shows the name and hours of each shift that was configured in the WFM Configuration Utility. If necessary, a vertical scroll bar appears to the right.

4. Adjust the shift's Start time and End times, 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 the Configuration Utility. If this option is unchecked, then the Shift will be inserted with no meals and breaks, and those can be inserted manually.
5. Click **Next.**
6. 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

   If you are inserting a shift for an agent that can work on multiple activities, you can select multiple activities.

   Note: The shift hours that you selected on the previous screen must be consistent with the activity set's configured time constraints. (Click **Previous** if you need to change the shift's start or end times.)

7. Click **Finish** to insert the selected work activities or activity sets and close the wizard.

Note: 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 Box

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.

   Select **Next Day** if the End time is on the day after the Start time.

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 Box

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).

   Click at or near the timestep where you want the meal to begin.

2. 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.

3. 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.)

4. Adjust the Start time and End time, as necessary.

   Select **Next Day** if the End time is on the day after the Start time.

5. Click **OK** to insert the selected meal and close the dialog box.

The view reappears. The new meal appears as a light-blue bar.

Note: 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 Box

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).

   Click at or near the timestep where you want the activity set to begin.
2. 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.

   Select **Next Day** if the End time is on the day after the Start time.

   Note: Your settings must match the activity set's configured time constraints.
5. Click **OK** to insert 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).

# Insert Exception Dialog Boxes

WFM uses different dialog boxes and menu items for part-day and full-day exceptions:

- Use the Insert Exception dialog box to insert a part-day exception into an agent's schedule.
- Use the Insert Full-Day Exception dialog box 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.

## Insert Exception Dialog Box

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).

   Click at or near the timestep where you want the exception to begin.

2. From the shortcut menu that appears, select **Insert** > **Exception.**

   The Insert Exception dialog box opens. The agent's name appears in the title bar.

3. In the grid, click an exception row.

   The grid shows the part-day exception types that are configured in the WFM Configuration Utility. 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.

4. 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.

5. 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).

Note: 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.

## Insert Full-Day Exception Dialog Box

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 WFM Configuration Utility. 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.

4. In the **Specify Start/End** section, you can optionally adjust the exception's Start time and End time as necessary.

   Select Next Day next to the Start Time and End Time text boxes if the exception starts on the day after the agent's shift begins. Or select Next Day next to the End Time text box if the exception begins on the same day as the agent's shift begins, but ends on the day after.

5. 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.
6. If you select the Specify Paid Hours check box, the **Paid Hours** check box becomes enabled.

> Note: 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 (known as *Total Hours* or *Duration*).

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 Dialog Boxes

WFM uses different dialog boxes and menu items for part-day and full-day time-off schedule items:

- Use the Insert Time Off dialog box to insert part-day time off into an agent's schedule.
- Use the Insert Full-Day Time Off dialog box 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 schedule item:

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 on the bar or near the timestep where you want the time off to begin.

2. From the shortcut menu that appears, select **Insert** > **Time Off.**

   The Insert 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.

Select the Show all checkbox to display all Time Off types. Clear the checkbox to display only Time Off types that are applicable to the selected agent. See Appendix D, "Time Off Primer" in the WFM Administrator's Guide.

The list shows part-day time-off types that were configured in the WFM Configuration Utility. 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 is paid and whether it counts toward time-off limits. You cannot select or clear check boxes to change these attributes here.

**4.** Optional: Adjust the Start Time and End Time for this time off, if the default values are not correct.

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.

Select Next Day to the right of the Start Time text box if the time-off starts on the day after the agent's shifts begin.

Select Next Day to the right of the End Time text box if the time-off ends on the day after it begins.

**5.** Optional: Specify a nonstandard length of your full-day time off.

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.

---

Note: The Specify Paid Hours check box is enabled only if you selected a paid time-off type in the Choose Time Off list.

---

**6.** Click OK to insert the selected time off and close the dialog box.

The view reappears. The new time off appears as a dark-green bar (you can change the color with the Colors Tool).

---

Note: 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 Full-Day Time Off

To insert full-day time-off 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.

   The list shows the full-day time-off types that were configured in the WFM Configuration Utility. 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 is paid and whether it counts toward time-off limits. You cannot select or clear check boxes to change these attributes here.

   Adjust the Start time and End time as necessary, by using the text boxes in the lower left of the dialog.

   Select **Next Day** next to the Start Time and End Time text boxes if the time-off starts on the day after the agent's shifts begin. Or select **Next Day** next to the End Time text box if the time-off begins on the same day as the agent's shifts begin, but ends on the day after.
4. Optional: Adjust the Start time and End time for this time off, if the default values are not correct.

   Clear the Full Day check box.

   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.

   Select Next Day to the right of the End Time text box if the time-off ends on the day after it begins.
5. Optional: Specify a nonstandard length of your full-day time off.

   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.

   Note: The Specify Paid Hours check box is enabled only if you selected a paid time-off type in the Choose Time Off list.
6. Click **OK** to insert the selected time off and close the dialog box.

The view reappears. The new full-day time off appears as a dark-green bar (you can change the color with the Colors Tool).

## Insert Marked Time Dialog Box

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 at or near the timestep where you want the marked time to begin. You can also click on a timestep outside of the shift. If you click on 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 on 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.

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). 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 Options Dialog View Options in the Master Schedule Intra-Day View topic or the Schedule Scenario Intra-Day View topic.

# Edit Item Dialog Box

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 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 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 Box

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.
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. Only valid exceptions are shown in the list.

- Beginning with release 7.5, you can set start and end times for full-day exceptions. Select the Specify Start/End check box and enter or select the correct times in the Start time and End time text boxes.
- If you replace a part-day exception with a full-day exception, all other schedule items for that day are removed.

To edit exceptions:

1. If you are replacing the current exception with another one, select it from the list.
2. If it is a part-day exception, set start and end times.
3. 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.

> Note: 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 (known as *Total Hours* or *Duration*).

4. 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.
5. Click **OK** to save your changes or **Cancel** to discard them.

The view reappears, showing the edited exception.

# Set Activities Dialog Box

Use the Set Activities dialog box to modify an agent's activity set by adding or removing activities:

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).

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 Box

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

The top of the Copy Schedule dialog box contains the date to be copied.

To use this dialog box, specify the copy-to date range:

1. Click the date selector for **Start date.** Select the start date for the copy-to range.
2. Click the date selector for **End date.** 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 (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 **Fix Later** or **Undo**.
5. When through in this dialog box, click **OK**.

# Meeting Scheduler Wizard

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 the Meeting Scheduler icon .
4. At the Select Agents dialog, choose the Agents who should attend.
5. At the Specify Meeting Parameters dialog, select the meeting type, possible dates, possible times, duration, and minimum percentage of required attendees.

   A message box appears, listing how many agents were scheduled for the meeting. Click OK.
6. If some agents were not scheduled, a message box may appear listing them. Click OK.

The meeting is scheduled, and exceptions, representing meeting, get 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 WFM Configuration Utility) is useful for scheduling pre-planned meetings especially ones that recur, such as weekly team meetings or bi-weekly one-on-one coaching sessions.

# 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 Schedule branch in the Modules tree displays the following Master Schedule views:

**Master Schedule Coverage View** Compares staffing coverage to forecasted (calculated and required) staffing data, and highlights overstaffed or understaffed timesteps.

**Master Schedule Weekly View** Displays a weekly summary table of total paid hours, working start/end times, or shift names for a site's agents and/or profiles.

**Master Schedule Intra-Day View** Displays Master Schedule details for a 24- or 36-hour period, enabling you to modify schedules for individual or multiple agents and profiles.

Unless you have the Approve Master Schedule Changes security permission, your changes are entered in pending mode. An approver with the Approve Master Schedule Changes security permissions must then accept or reject the changes.

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 View** Displays and allows editing of a single agent's schedule for one week or the schedule planning period.

**Master Schedule Summary View** Displays service-level and related statistics for the Master Schedule.

**Master Schedule Changes Approval View** Enables users with the appropriate security permissions to review pending schedule changes, and approve or reject them.

**Master Schedule State Group Totals View** Displays coverage statistics for every timestep in a selected day.

Click a branch in the Modules tree to open the corresponding view. (Or use the Views toolbar's Scenarios drop-down list to move among these views.)

## 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.

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.

The following sections cover:

- Displaying the Coverage view.
- Using the Daily graphs and tables.
- Reading the Totals table.
- Customizing the Coverage view.
- How understaffing and overstaffing are calculated.

## Displaying the Coverage View

To display the Coverage view:

1. In the Modules tree, click **Master Schedule Coverage.**

   The Master Schedule Coverage view appears.

In the Objects tree, select sites and/or activities.

You can select a single business unit, a single site within a business unit, 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 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.

### 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. 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.

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Note: 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).

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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).

## 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 and/or profiles within a single site. An example view is shown below.

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.

The following sections cover:

- Displaying the Weekly view.
- Using the table.
- Customizing the Weekly view.

### Displaying the Master Schedule Weekly View

To display the Master Schedule Weekly view:

1. In the Modules tree, click **Master Schedule Weekly.**

   The Master Schedule Weekly 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 work with only one site at a time, but you can select any number of agents and/or teams within that site.

3. 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, Vacation, 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).

Note: 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.

**Long (Planning) Period Totals**—Shows an agent's or profile's total paid hours for the schedule planning period. This period's duration and start date are set in the WFM Configuration Utility's Policies > Contracts> Contracts General 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.

**Working Start/End Time**—Start and end times of agents' work.

**Shift Names**—Names of agents' assigned shifts.

### Mode

Select 1 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 in the WFM Configuration Utility, 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:

**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 column.

**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 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.

**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 Master Schedule to its former settings.

**Meeting Scheduler**—Opens the Meeting Scheduler Wizard.

Note: 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 agent> for every schedule day that contains a granted calendar item.
2. Click **Apply** to save.

On the Columns tab:

1. Select **Agent Rank** to display the column; de-select to hide the column.
2. Click **Apply** to save.

# Master Schedule Intra-Day View

## Overview

Use the Master Schedule Intra-Day view to manage schedule details for agents and profiles, for a specific day in the Master Schedule.

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 View check box, data is also shown in a table.

You can modify schedule items for individual agents or profiles here, and you can insert schedule items for multiple agents and/or profiles. The following sections and links cover:

- Displaying the Intra-Day view.
- Using the grid.
- Customizing the grid.
- Modifying multiple agents' schedules.
- Modifying individual agents' schedules.
- Searching for an agent.
- Viewing performance data.
- Using the Intra-Day Schedule Rebuild Wizard.

### Displaying the Intra-Day View

To display the Intra-Day view:

1. In the Modules tree, click **Master Schedule Intra-Day.**

   The Master Schedule Intra-Day view appears.
2. In the Objects tree, select a site, teams, and/or agents.

   You can expand business units to display their sites, and expand sites to display their teams and agents. You can work with only one site at a time, but you can select any number of agents and/or teams within that site.
3. Click **Get data** to display the Intra-Day view for the selected agents.

### Using 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 team, agent, contract, start time, shift start time, paid hours, overtime, and total hours, by clicking on the header for that column.

Note: Double-click on cells containing these items, to edit them: Shift, Activity Set, Time Off, Meal, Break, Exception, Marked Time.

**Auto-Commit—**This button toggles on and off the auto-commit feature. 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.

Note: If you do not have the Approve Changes security permission for the Master Schedule, the auto-commit button is disabled.

**Full View—**Select the Full 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.

**Options—**Enables you to customize the view by selecting options that cover agent availability, 24-hour or 36-hour display, marked time, performance data, and whether to display or hide the Overtime, Paid Hours, Total Hours, Start Time, and Comment columns. For more information, see the Options Dialog Box topic.

**Scheduled agents—**This indicator 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.

**Date—**These controls are standard date selectors.

**! (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 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).

  Double-click a yellow or red icon to review message details and resolve the unsaved items.

**Team—**This column shows each agent's assigned team.

**Agent—**This column shows each agent's name.

**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.

**[Timesteps]—**These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the Full 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 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 the Getting Started Overview.

### Searching for an Agent

To find a specific agent in the Master Schedule Intra-day view:

1. You can 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:

**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 Overtime, Paid Hours, Total Hours, Start Time, 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 for multiple agents or teams.

**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 (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, the auto-commit check box is cleared and disabled.

**Meeting Scheduler—**Opens the Meeting Scheduler, which enables you to schedule meetings to already build scenario for selected agents.

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 View Options dialog box adds a graph and a table to the Master Schedule Intra-day display.

Note: The table appears only if you clear the Full View check box.

To configure the performance data views:

1. Select a target for the performance data by clicking the ellipsis (...) button next to the **Target:** label. This list that appears contains both the activities 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 (appears on the graph in blue), Required (appears on the graph in yellow), or Advanced (both Calculated and Required; appears on the graph as a blue area for the calculated staffing and as a yellow line showing the required staffing). By default, the graph shows Calculated staffing.
- The table always displays values for schedule coverage and calculated staffing. It may show additional figures, depending on your selections on the Performance tab of the Options dialog box.

If you are not using automatic updates, click the **Refresh Performance Data** button 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 in Configuration Manager. For more information, see the "Enabling Multi-Skill Support" section in the current *Workforce Management Administrator's Guide*.

## Performance Data Target

To view performance data in the Master Schedule or 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, or an activity (either multi-site or single-site).

To open the Select Target window:

- Click **Target...** on the Schedule Intra-Day view window.

---

Note: 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.

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## 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.

To open the Options dialog box:

- Click the Options button on the Actions toolbar or select **Options** from the Actions menu.

The Options dialog box appears.

- When called from an Intra-Day view, it has three tabs: Options, Performance, and Columns.
- When called from an Agent-Extended view, it two tabs: Options and Columns.

Each tab is described below. After you are done configuring the Options dialog box, click **Apply** 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 leftmost column (labeled "!") for every Agent who meets these conditions.

> Note: 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 one of his preferences, or a schedule from a rotating pattern, then the icon will not be shown.

Select the radio button for the hours you want to show, 24 to show 24 hours or 36 to show 36 hours.

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.

> Note: You see the table only if the Full View check box is *not* selected.

In addition to scheduled coverage and calculated staffing, which always appear, you can select any or all of the following 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 ASA (Average Speed of Answer)

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: Overtime, Paid Hours, Total Hours, Start Time, Comments. In Intra-Day view, all columns are sortable, except for Comments. In Agent-Extended view, these columns are not sortable.

## 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—**Displays the team to which this agent belongs.

**Agent—**Displays the agent whose schedule generated this message.

**Message—**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 in order 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.
>
> **Undo—**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.

**Cancel—**Closes the dialog box without saving or refreshing data.

Note: 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. The figure below shoClick the toolbar buttons on the image to jump to their descriptions below.

Note: 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 here, and you can insert schedule items for multiple agents and/or profiles. The following sections and links cover:

- Displaying the Agent-Extended view.
- Using the Agent-Extended view grid.
- Customizing the Agent-Extended view grid.
- Using the Agent-Extended view toolbar buttons.
- Modifying an agent's schedule.

## Displaying the Master Schedule Agent-Extended View

To display this view:

1. In the Modules pane, expand the Schedules module.
2. In the Modules tree, click **Master Schedule Agent-Extended**.

   If already accessed during the current session, the Agent-Extended view appears with the last selected agent.

   If accessed for the first time, an empty Agent-Extended view grid appears. The Objects tree displays the business unit/site(s)/team(s) associated with the Master Schedule.
3. Expand the Objects tree and select a single agent. You can work with only one agent at a time.

## 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.

Note: Double-click on 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 View—**Select the Full View check box to have the grid display the entire day similar to the Intra-Day view as shown in the example above. If you clear this check box, the grid shows a more detailed view as shown for the Scenario Agent-Extended view. Full 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 (see graphic above) 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 Configuration Utility, 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.

**[Timesteps]—**These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the Full 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 on a dark blue area within a color-coded bar (unless you change the color). The menu items vary depending on the area clicked.

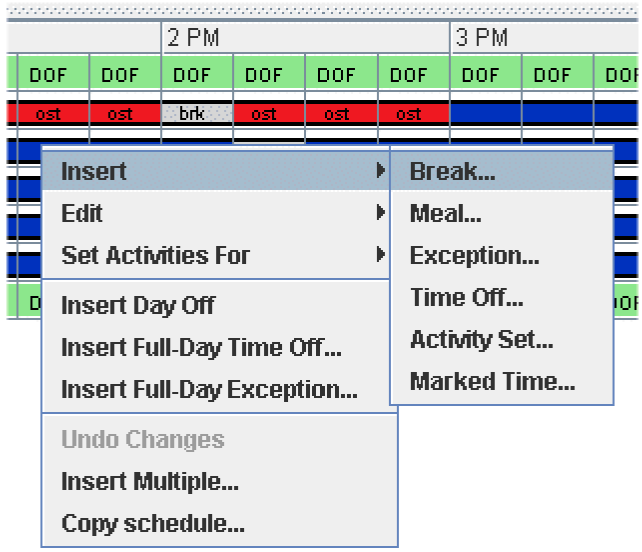


**Figure 28: Modifying an Individual Agent's Schedule**

See Modify Individual Agent's Schedules for instructions and explanations.

**[Horizontal scroll bar]**—Appears below the table when clearing the Full 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.

## Customizing the Master Schedule Agent-Extended View Grid

You can resize the Team, Agent, and Date columns. For details, see the Getting Started Overview. You can also add and remove columns.

**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.

## 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. Click an Action button on the Master Schedule Agent-Extended view image to jump to its description.

## Modifying an Agent's Schedule

You can use the following buttons on the Actions toolbar (these commands also appear in the Actions menu):

**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 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, 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.**)

**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 check box is cleared and 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, or vacation days for multiple agents or teams.

**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 (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—**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.

# Master Schedule Summary View

Use the Master Schedule Summary view to display statistics about the Master Schedule.

The summary view provides standard date-selection controls, a Granularity control, and two clickable tabs, Data and Graph.

The following sections cover:

- Displaying the Summary view.
- The Data tab.
- The Graph tab.
- Customizing the Summary view.

## Displaying the Master Schedule Summary View

To display the Master Schedule Summary view:

1. In the Modules tree, click **Master Schedule Summary.**

   The Summary view appears.
2. In the Objects tree, select an object.

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 tab grid.

### Data Tab

The Data tab provides a scrollable grid displaying 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 Column Statistics and Quantities

The grid provides columns displaying the following statistics and quantities.

- 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 Schedule, 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]

See explanations of Optional fields in the Filters Dialog Box topic.

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### Table 2: Grid Columns Defined

| Column | Definition |
|---|---|
| **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.<br>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. |

**Table 2: Grid Columns Defined (Continued)**

| Column | Definition |
|---|---|
| **Service Level Percentage Forecasted** | The service level percentage that can be expected to be achieved based on the number of agents forecasted.<br>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 (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 forecasted interaction volumes, AHT, and applicable service objectives. |

**Table 2: Grid Columns Defined (Continued)**

| Column | Definition |
|---|---|
| **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 |
| **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 |
| **Difference [Budget Scheduled minus Budget Forecasted]** | Optional field. Budget Scheduled minus Budget Forecasted |

### Graph Tab

The Graph tab 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 which statistic that you want to graph. The options correspond to the Data tab's available columns (except that Difference Calculated and Difference Required cannot be graphed).

### Graph

The graph is redrawn to match your 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).

## Customizing the Summary View

These commands are available on the Actions toolbar (and also on the Actions menu):

**Options—**Opens the Options dialog box. Enables you to display or hide individual statistics.

The following are 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, and 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]. See 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.

**Cleanup—**Opens the Cleanup window. 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 forecast scenario (using the Publish Schedule Wizard), and/or make a backup of the WFM database (using the WFM Database Utility).

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 the ellipsis (...) button 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 **OK** 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.

## Master Schedule Changes Approval

Viewing and using the Master Schedule Changes Approval module requires that you have Schedule Approve Changes security permission enabled. If you do not, you cannot see this module 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 module 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. Select Master Schedule Changes Approval under the Schedule module.
2. Select the objects whose schedule you want to work with. You can only choose one site, or objects within one site, at a time.
3. From the Period drop-down list, select the time period to view. You can select Daily or Weekly.
4. 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.
5. 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.
6. 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:

**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.

**Team—**The team to which the affected agent belongs.

## Filter By Agent Properties

You reach this dialog box by clicking on 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 Agent properties under the current site:

- The left-hand column displays a list of Activities Agents Have Skills For.
- The right-hand column displays a list of Contracts.

All check boxes are selected by default.

1. Clear the check boxes for the items that you want excluded from the filter.
2. Click **OK** to apply your choices.

### 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, this column includes the shift's start and end times. 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.

   **Colors—**Items that do not match in the original and edited schedules appear in specific colors. Non-matching items in the schedule pane are marked in blue. Non-matching items in the modified schedule pane are marked in red.
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 box 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.

Warning! If you accept or reject any pending change for an agent, ***all*** pending changes for that agent are accepted or rejected.

The Master Schedule is updated to include all accepted schedule changes.

## Review Validation Messages Dialog Box

Use the Review Validation Messages dialog box to view any warnings or errors that the server returned when you validated the selected pending changes to the Master Schedule.

The dialog box contains the following columns and controls:

**Team**—The team to which the agent whose schedule is being changed belongs.

**Agent**—The agent whose schedule change generated this message.

**Message**—The message type (either Warning or Error), numeric code, and the message text.

**OK**—Closes the dialog box and retrieves fresh data from the server.

**Cancel**—Closes the dialog box without saving or refreshing data.

Note: These errors and warnings would be generated if you approved the selected pending schedule changes. They differ from Validation warnings and errors, which WFM Web generates during the schedule building process.

# Schedule Bidding

## Overview

Schedule bidding allows 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 view the scenario and may 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 on links in the summary steps below, to read details.

## Setting Up Bidding

1. Someone with administration permissions must enable schedule bidding. This is described in the “Agent Bidding Section” of *Chapter 5: Configuring the Options Tabs* in the current *Workforce Management Administrator's Guide*.
2. The Supervisor creates and configures a bidding scenario. (See “Configure Bidding Scenario” on page 232.)

   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.

   Note: 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.

## Bidding on the Schedule

3. Agents examine the bidding scenario options and submit their bids.
4. The bidding period closes when the Bidding End Date arrives.(See “Control Bidding Process Wizard” on page 234.)

   Agents can not access the closed bidding scenario.

## Resolving the Bids

5. The Supervisor reviews schedule bids. (See “Resolving and Publishing a Bidding Scenario” on page 236.)

   The Supervisor may wish to manually modify or assign schedules to agents.
6. The Supervisor starts the auto-assignment wizard. (See “Auto-Assign Schedules Wizard” on page 236.)

   The wizard assigns schedules to agents.
7. The Supervisor reviews results of auto-assignment. (See “Resolving and Publishing a Bidding Scenario” on page 236.)

   The Supervisor may wish to manually modify or reassign schedules.

### Finalizing the Schedule

8. The Supervisor publishes the bidding scenario to the Master Schedule. (See “Publishing/Extracting Schedules” on page 252.)

After all schedules have been assigned to real agents, the Supervisor can run a Schedule Bidding Report.

## Configure Bidding Scenario

Begin at the Schedule Scenarios View. (See “Schedule Scenarios View” on page 127.)

### Create a Forecast Scenario

1. Create a New Forecast Scenario. (See “New Forecast Wizard” on page 54.)

   Define the work week(s) that this forecast spans and the activities that it requires.

2. Build Volumes (see “Volumes Build Wizard” on page 62), Build Staffing (see “Staffing Build Wizard” on page 77), and then Publish the Forecast (see “Publish/Extract Forecasts” on page 89).

   This transfers the forecast to the master schedule database, so you can configure a bidding schedule. Follow all the steps are exactly as you would to create a non-bidding schedule.

### Create a Schedule Scenario

3. Create a New Schedule Scenario. (See “New Schedule Scenario Wizard” on page 131.)

   Define the General Parameters including Start Date, End Date and Extended End Date. (See “General Parameters” on page 132.)

   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.

4. Select Activities (See “Select Activity” on page 133), and Agent Profiles (See “Select Agents” on page 134). You can select real agents too, but their schedules will not be biddable.

5. Build the scenario.

### Configure the Scenario for Bidding

6. Build the Bidding Schedule. (See “Schedule Build Wizard” on page 238.)
7. Define which Agents can bid in the Bidding Candidates Selection dialog. (See “Bidding Candidates Selection” on page 233.)
8. Define when Agents can bid in the Control Bidding Process Wizard. (See “Control Bidding Process Wizard” on page 234.)

## Bidding Candidates Selection

Use the Bidding Candidates Selection dialog to specify which Agents are eligible to bid on a chosen bidding Scenario.

### Preparation

1. Create and configure a Scenario for bidding. (See “Configure Bidding Scenario” on page 232.)
2. Open the Scenario and select the Profiles/Bidding view. (See “Schedule Scenarios View” on page 127.)

### Assigning the Agents

3. To open the wizard, click the Bidding Candidates Selection icon  in the toolbar.
4. In the Bidding Candidates Selection dialog, open the site(s) and then the Team(s).
5. Select only the team members who will be eligible to bid on your configured Scenario. Clear the checkbox to the left of each member who will not be eligible to bid.
6. Click **OK**.

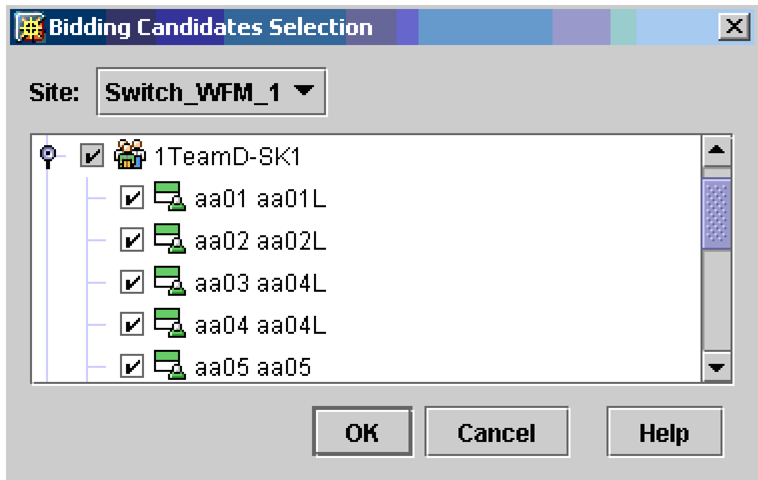


**Figure 29: Bidding Candidates Selection dialog**

# Control Bidding Process Wizard

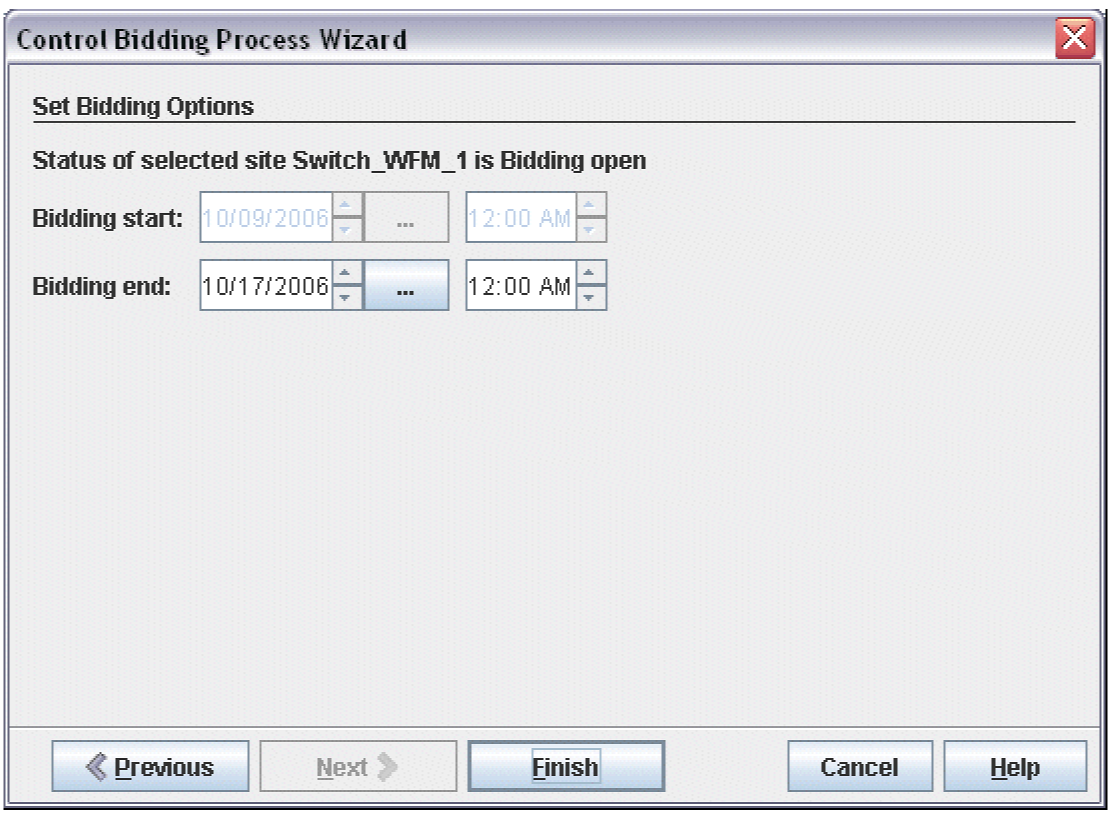


**Figure 30: Control Bidding Process Wizard**

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.

## Preparation

1. Create and configure a Scenario to be used for bidding. (See "Configure Bidding Scenario" on page 232.)
2. Open the Scenario and select the Profiles/Bidding view for that scenario. (See "Schedule Scenarios View" on page 127.)

## Running the Wizard

3. To start the wizard, click the Control bidding process icon  in the toolbar.
4. In the Select Site dialog, select the appropriate site and click Next.
5. 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).

> Note: You can change the End Date after the bidding scenario is already open and while agents are bidding. You may need 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.

Click **Finish**.

## Resolving and Publishing a Bidding Scenario

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. (See “Control Bidding Process Wizard” on page 234.)

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. (See “Auto-Assign Schedules Wizard” on page 236.)

4. Publish the now-finished bidding schedule to the Master Schedule. (See “Publishing/Extracting Schedules” on page 252.)

   The Publish to Master Schedule page of the Publishing wizard includes the check box Insert granted exception, time off, and day off Calendar items, which you can use to overlay these items in the schedule.

> Note: Unassigned profile schedules are not published to the Master Schedule; only real agents' schedules.

Once 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. (See “Schedule Reports” on page 324.)

## Auto-Assign Schedules Wizard

Reach this wizard by clicking the Auto-Assign Schedules icon in the toolbar.

Follow these steps:

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 in the WFM Configuration Utility's Agent Configuration window.

**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 Candidates 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.

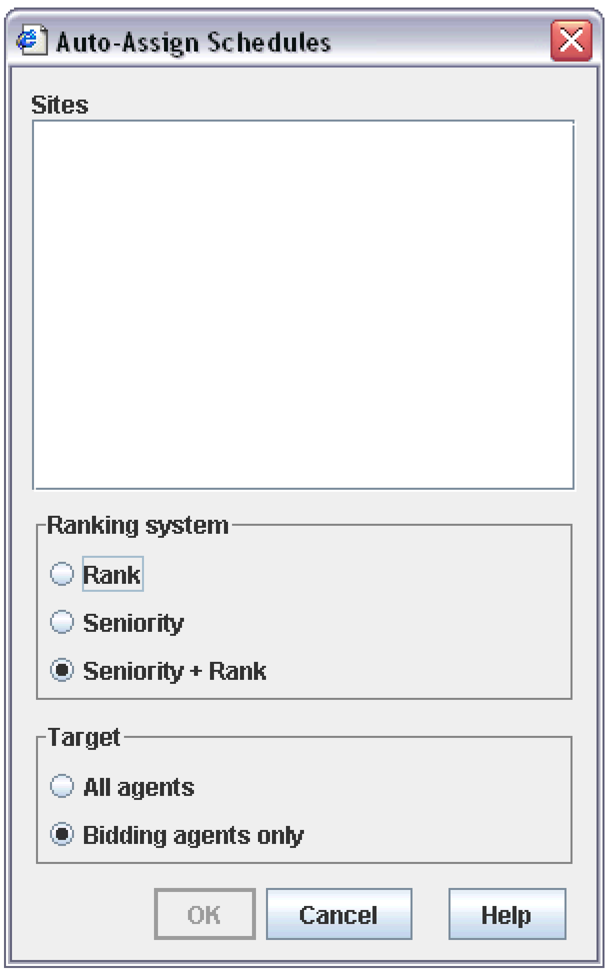


**Figure 31: Auto-Assign Schedules Dialog**

# Schedule Build Wizard

## Overview

Use the Schedule Build Wizard to build a schedule for a selected site, based on a selected scenario.

The build process includes all activities and agents defined for this site in the scenario.

To use the wizard:

1. Use the New Schedule Scenario Wizard to create a schedule scenario or select an existing scenario.
2. Click the Build schedule button from the Actions toolbar in a Schedule Scenario view (Scenario Intra-Day view, Scenario Agent-Extended view, Scenario Coverage view, Scenario Weekly view, Scenario Profiles/Bidding view, or Scenario Summary view).

   The first of the Schedule Build Wizard's two screens, Site Options, opens.
3. Select the site and build options that you want and then click **Next.**

   If you select the Use Team Constraints check box, the Team Synchronicity screen opens next.
4. Select the specific constraints to apply and click Next.
5. Specify the settings that you want to apply to the build and click Next.

   If you created your schedule scenario using profiles (not real agents), then the Optimize Number of Profiles and Assign Profiles to Teams screens follow, in that order.
6. At the Optimize Profiles screen, specify the settings that you want to apply to the build and click Next.

   If you set Team Size and select the Use Backfilling of Existing Teams check box, go to step 7. If you did not, click Finish.
7. At the Assign Profiles to Teams screen, specify the settings that you want to apply to the build and click Next.
8. Click **Finish**.

## Select Site/Build Options

Use the Schedule Build Wizard's Select Site screen to select a site and schedule build options.

1. From the Sites drop-down list, select the site whose schedule you want to build.

   The list offers you the sites in the selected scenario.

2. Under Build Options, select or clear **Force Single Skills**.

   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.

3. Select or clear **Use Required**.

   If you select this option, the schedule is built with the Required Staffing forecast, not with the Calculated Staffing forecast.

4. Select or clear **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. Selecting this check box relaxes those constraints for this month.

5. Select or clear **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.)

6. Select or clear **Use Team Constraints**.

   If you select this option, if you have synchronization of daily schedules configured for one or more of your Contracts, the schedule start times are synchronized for agents in the same team, within the configured threshold.

7. Select or clear **Exclude granted agents from team 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.

   ---
   Note: *Always* select this option when you are using team constraints.

   ---

8. Click **Next** to continue, or **Cancel** to discard your selections and close the wizard.

# Preference Fulfillment Options

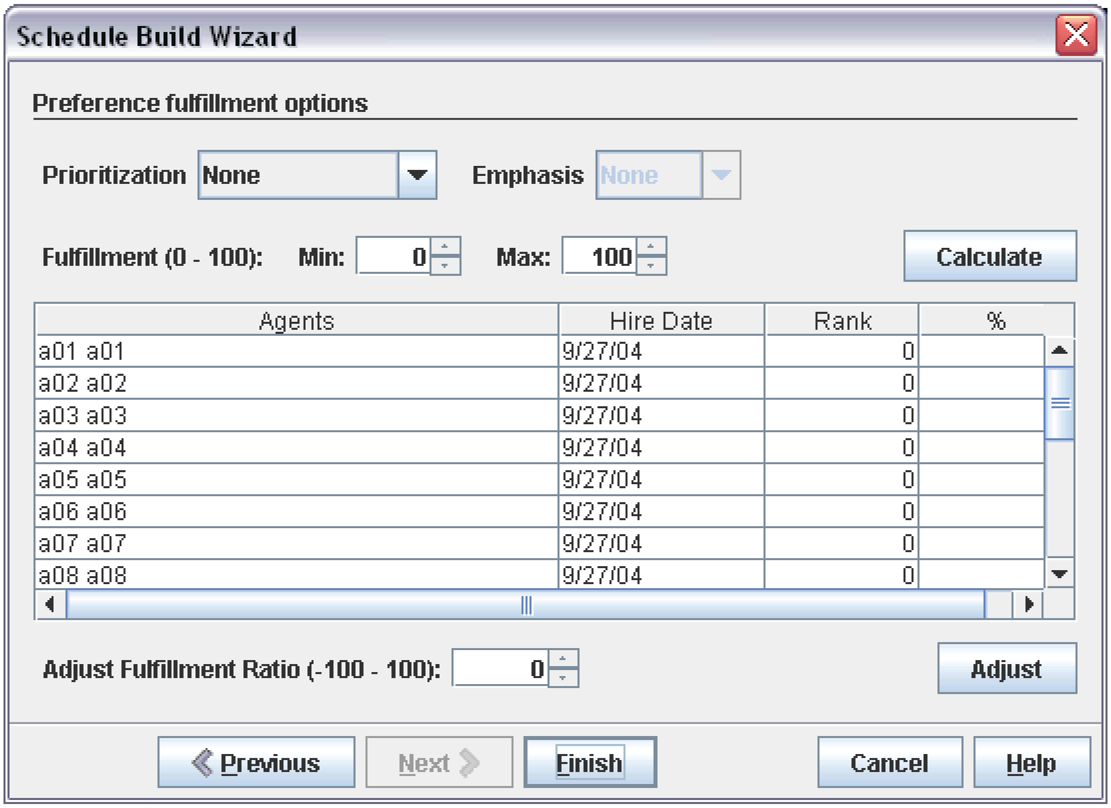


**Figure 32: Preference Fulfillment Options window**

Select Force Maximum Preference Fulfillment to:

- treat all preferences in preferred status as granted
- resolve all granted and would-be granted preferences
- use the result to build the schedule
- disable all other options in the dialog box

Or, clear Force Maximum Preference Fulfillment (the default setting) and use the Schedule Build Wizard's second (and final) screen, Preference Fulfillment options, to set preference-fulfillment options the Schedule Build Wizard's second (and final) screen, preference Fulfillment options, to set preference-fulfillment options.

# Preference Fulfillment Options

The screen's upper area provides the following options:

1. From the Prioritization drop-down list, select **None**, **Seniority**, **Rank**, or **Seniority + Rank** to determine how WFM Builder favors agent requests when building the schedule. If you select None, the Emphasis drop-down list is not enabled.

   *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 WFM Configuration Utility's Agent Configuration window (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.

2. From the Emphasis drop-down list, select **None, Low, Medium,** or **Strong**. This setting controls how closely the build process considers skill coverage when it assigns priorities to preferences.
   - *None* means 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 multiskilled optimization over preference fulfillment.
   - *Strong* means that schedule building does not consider multiskilled optimization when it allocates preferences.
   - *Medium* indicates that schedule building accommodates preferences if a loss in any skill coverage is caused only by an exception.
   - *Low* means that schedule building places more emphasis on preference fulfillment, without sacrificing multiskilled optimization.

3. Enter percentage values for Min and Max.

   *Min* and *Max* set the minimum 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).

   Note: 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.

4. Click **Calculate.**

The table display is re-sorted by the % column, which now shows each agent's calculated chance of preference fulfillment. (You can use the table's vertical scroll bar to display more agents.)

## Adjust Fulfillment Ratio (-100 – 100)

To adjust 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.
2. Click **Adjust.**

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.

---

Note: 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%.

---

### Navigation Buttons

The buttons at the bottom of the screen provide the following options:

- Click **Finish** to build the schedule with the settings that you have selected.
- Click **Back** to review or change your settings in the Site and Build Options screen.
- Click **Cancel** to close the wizard without building a schedule.

# Intra-Day Schedule Rebuild Wizard

## Overview

Use this wizard to rebuild an Intra-Day schedule for a specific day or time period for a site, team, or agent. While in a Schedule Scenario or 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.

### 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 may cause the schedule to be sub-optimal by the time a particular schedule day arrives. For example:

1. You may have re-forecasted volumes and staffing for the day.
2. Agents may have called in sick or were given time off.
3. Existing agent schedules may have been manually adjusted.
4. Additional agents may have been added into the schedule.
5. Meetings or other types of exceptions may have been added to the schedule.

Because of this, you may wish to re-optimize the schedule day. It does not make sense to re-optimize days or hours that have already passed. You probably do not want to re-optimize 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 re-optimize 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 re-optimization.

To use the wizard:

1. Select a Schedule Scenario or Master Schedule view (Intra-Day, Weekly, or Agent Extended).
2. Click the Rebuild intra-day schedule button from the Actions toolbar.
3. The first of the Wizard's screens, Select Options, opens. Select a date/time and rescheduling options, then click **Next.**
4. In the next screen select a site and build options, then click **Next**.
5. In the next screen, select agents.
6. If you selected certain options on the Select Options screen, the Select Activities screen opens.  Otherwise, click **Finish,** or **Cancel** to discard your selections and close the wizard.

## Select Options

Use the Intra-Day Schedule Rebuild Wizard's Select Options screen to select a start date and time and rescheduling options.

Note: For information on task sequences (fourth and fifth rescheduling options), see the *Workforce Management 7.5 Configuration Utility Help*.  Also see the *Workforce Management 7.5 Administrator's Guide*.

1. From the Date drop-down, select the date to be rebuilt in the schedule. This date cannot be outside the scenario's date range. The default value shown is the date selected in the view from which the Wizard was called.
2. Opposite Start from, select the time in the scheduled day to start rebuilding. The default value shown is the computer's current time rounded to the nearest time step 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. Select/clear other rescheduling options including:

   Reschedule breaks, meals, activities/activity sets/task sequences, shift start and/or end times may change.

   If the above option is selected, the following check boxes become enabled:

   - **Shift start time is fixed**. You might not want to change shift start and/or end times because you might not want to subject agents to that level of disruption. You may not be able to notify agents in a timely manner if you plan to change their start times, so by selecting the Shift start time is fixed checkbox, you would not have to be concerned about that.
   - **Shift end time is fixed**. See above entry for Shift start time is fixed.
   - **Paid duration is fixed**.  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.

4. Keeping the **Auto-commit changes** default instructs the schedule builder to commit all schedule changes. Otherwise, they will be put into the schedule in a pending mode.
5. Click **Next** to continue, or **Cancel** to discard your selections and close the wizard.

# Site and Build Options

Use the Intra-Day Schedule Rebuild Wizard's Select Options screen to select a site and schedule rebuild options.

1. From the Sites drop-down list, select the site whose schedule you want to build.

   The list offers you the sites in the selected scenario.
2. Under Build Options, select or clear **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.
3. Select or clear **Use Required**.

   If you select this option, the schedule is rebuilt with the Required Staffing forecast, not with the Calculated Staffing forecast.
4. Select or clear **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. Selecting this check box relaxes those constraints for this month.
5. Select or clear **Shuffle Agents**.

   If you select this option, the agent pool is *randomized* before rescheduling. (*Randomizing* ensures that the schedule's results are independent of the sequence in which agents are loaded into the scheduling algorithm.)
6. Select or clear **Use Team Constraints**.

   If you select this option and you have synchronization of daily schedules configured for one or more of your contracts, the schedule start times are synchronized for agents in the same team, within the configured threshold.

   If you select this option and you have synchronization of daily schedules configured for one or more of your contracts, the next page in the wizard will be Team Synchronicity, where you can specify the specific constraints that will be used to synchronize a team's schedule.

7. Select or clear **Exclude granted agents from team 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.

   > Note: *Always* select this option when you are using team constraints.

8. Click **Next** to continue, or **Cancel** to discard your selections and close the wizard.

# Team Synchronicity

Use the Schedule Build Wizard's Select Site screen to select a site and schedule build options.

This wizard page appears when you selecte Use Team Constraints in the Select Site dialog box.

1. Select the **Synchronize Days Off** check box to specify that days off should be synchronized for all teams.
2. Use the radio buttons under Synchronize By: 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**
   - **Paid Duration** and **Shift Start Time**
   - **Paid Duration**, **Shift Start Time** and **Meals**
   - **Paid Duration**, **Shift Start Time**, **Meals** and **Breaks**
   - **Paid Duration** and **Meals**
   - **Paid Duration**, **Meals** and **Breaks**
3. Select the **Apply constraints only to the same contracts inside team** 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.
4. Click **Finish** to enable your choices.

Synchronization applies to all teams.

# Preference Fulfillment Options

This Schedule Build Wizard screen appears if the schedule scenario you are building contains actual agents (not profiles) in the selected site. Use these controls described below to optimize the number of profiles.

Select **Force Maximum Preference Fulfillment** 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 (as illustrated above).

Or, clear **Force Maximum Preference Fulfillment** (cleared is the default setting), and use the Schedule Build Wizard's second (and final) screen, Preference Fulfillment options, to set preference-fulfillment options, as described in the sections Preference Fulfillment Options and Adjust Fulfillment Ratio.

## Preference Fulfillment Options

The screen's upper area provides the following options:

1. From the Prioritization drop-down list, select *None*, *Seniority*, *Rank*, or *Seniority + Rank* to determine how WFM Builder favors agent requests when building the schedule.
    - If you select *None*, the Emphasis drop-down list is not enabled.
    - *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 WFM Configuration Utility's Agent Configuration window (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.
2. From the Emphasis drop-down list, select *None*, *Low*, *Medium*, or *Strong*. This setting controls how closely the build process considers skill coverage when it assigns priorities to preferences.
    - None means 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 multiskilled optimization over preference fulfillment.
    - *Low* means that schedule building places more emphasis on preference fulfillment, without sacrificing multiskilled optimization.
    - *Medium* indicates that schedule building accommodates preferences if a loss in any skill coverage is caused only by an exception.

- *Strong* means that schedule building does not consider multiskilled optimization when it allocates preferences.

**3.** Enter percentage values for Min and Max.

Min and Max set the minimum 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).

Note: 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.

**4.** Click Calculate.

The table display is re-sorted by the % column, which now shows each agent's calculated chance of preference fulfillment. (You can use the table's vertical scroll bar to display more agents.)

## Adjust Fulfillment Ratio (-100 — +100)

To adjust 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.

**2.** Click Adjust.

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.

Note: Note: 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%.

### Navigation Buttons

The buttons at the bottom of the screen provide the following options:

- Click Finish to build the schedule with the settings that you have selected.
- Click Previous to review or change your settings in the Site and Build Options screen.
- Click Cancel to close the wizard without building a schedule.

## Optimize Profiles

This Schedule Build Wizard screen appeared because the schedule scenario you are building contains profiles and not actual agents in the selected site. Use these controls described below to optimize the number of 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 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 0 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. Editable. Range: Empty (default) or any number from 0 to 9999

### Controls

**Total Growth Ratio** field—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.

**Team Size** field—The maximum number of profiles that WFM can use when creating profile teams. Range: Empty (default) or any positive number greater than 0 (zero).

**Use Backfilling of Existing Teams** check box**—**Select to specify if existing non profile teams should be filled up to the number of agents specified in the field Team size. The default value is cleared. If you select this check box, then the next wizard page is Assign Profiles to Teams.

Note: Team Size and Use Backfilling of Existing Teams are enabled only if you selected Use Team Constraints in the Select Site dialog box.

Click **Next** (if Use Backfilling of Existing Teams is checked ) or Finish.

## Assign Profiles to Teams

This screen appears because you selected Use Backfilling of Existing Teams on the previous screen (Optimize Profiles).

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 page Optimize Profiles

1. Select a profile for each team.
2. Click **Finish**.

# Schedule Rebuild Wizard

Use the Schedule Rebuild Wizard to change a built schedule's included agents, teams, and/or dates:

1. Click the Rebuild schedule button on a schedule scenario view's Actions toolbar or select this command from the Actions menu.

   The first of the Schedule Rebuild Wizard's two screens, Choose Start/End Date, opens.

   Enter the dates for which you want to rebuild the schedule.

   Neither date can be outside the scenario's original date range.
2. Click **Next.**
3. From the Select Team window's Agents 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 site.

   Note: A highlighted background color indicates agents whose schedules were edited (for the selected date range) after the last build or rebuild.
4. 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.
5. Click **Finish** to rebuild the schedule with the new parameters.

   Or click **Back** to review or change your Start/End Date selections, or **Cancel** to close the wizard without modifying the schedule.

## Select Agents

Use the Intra-Day Schedule Rebuild Wizard's Select Agents screen to select one or more teams or agents within a team.

- Under Select Agents, you can expand business units (if configured) to display their sites and expand sites to display their 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.

If you selected **Reschedule breaks, meals, activities/activity sets/task sequences, shift start and/or end times may change** on the Select Options screen, the Select Activities screen appears. Otherwise, click Finish, or Cancel to discard your selections and close the wizard.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.

## 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. Select one or more activities.
2. Select **Retain scheduled activities** to have the build add any activities selected above while still keeping the activities currently in the Schedule.
3. Click **Finish,** or **Cancel** to discard your selections and close the wizard.

# 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 the Publish button 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. Select the check box **Insert granted exception, time off, and day off Calendar items** 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. 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 re-publish 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 the Publish button 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**.

Note: 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.

The sections below cover:

- Using the Review Messages window.
- The Warnings list.
- The Errors list.

## Using the Review Messages Window

The Review Messages window contains the following controls:

**Choose Site**—Use this drop-down list to select one site.

**Reviewed**—Select the check boxes in this column to indicate messages that you have reviewed.

**Message**—Shows the text of each generated message.

**Save**—Saves your reviewed selections and closes the window.

**Close**—Discards all changes and closes the window.

# Warnings List

Note: When Schedule building or validation generates the following warnings, the variable text shown here in braces { } is replaced with the actual value.

**Warning[1]** The workload of agent {A} cannot be increased to meet the planning period requirements.

The number of planning period hours scheduled for this agent is less than the minimum planning period requirement for the agent as described in the contract. This can happen when the agent is forced to take days off. Forced days off are usually caused by unrealistic contract weekend and day-off constraints. Other possible causes of forced days off include: the day-to-day distance constraint cannot be met; there are no shifts available on the day; or the day-off constraints require a day off. However, in cases where the agent begins work in the middle of a planning period, planning period work cannot be increased to the usual amount; therefore, you should either disregard the warning or enter the agent's history for the beginning of the planning period.

**Warning[2]** The workload of agent {A} cannot be decreased to meet the planning period requirements.

The number of planning period hours scheduled for this agent is greater than the maximum planning period requirement for the agent as described in the contract. This usually happens when the set number of daily and/or weekly hours does not allow for the planning period-hours constraint to be satisfied.

**Warning[3]** The scheduler could not assign a day off for agent {A} on week with first day {B}.

No days off have been assigned to an agent in the specified week in order to satisfy the agent's minimum days off per week requirement. This can happen when the contract day-off rules and the weekend fairness rules create a mandatory pattern of days-off assignment that is not compatible with the minimum number of days off per week.

**Warning[4]** Too many days off have already been assigned for agent {A} on week with first day {B}.

The user has assigned more days off to an agent in the specified week than are permitted by the agent's constraints. Contract weekend and/or day-off rules limit the number of days off allowed.

**Warning[5]** The workload of agent {A} cannot be increased to meet the weekly requirements on week with first day {B}.

The number of hours scheduled for this agent in the specified week does not meet the minimum weekly hours requirement for the agent as described in the contract. See Warning[1] for possible causes.

**Warning[6]** The workload of agent {A} cannot be decreased to meet the weekly requirements on week with first day {B}.

The number of hours scheduled for this agent in the specified week is more than the maximum weekly hours requirement for the agent as described in the contract. See Warning[2] for possible causes.

**Warning[7]** No shifts match the constraints for contract {A} of agent {B} on day {C}.

No shifts matched the contract constraints for the specified agent on the specified day. Usually, this means that the shift does not have a duration that will satisfy the daily or weekly hours constraints for the contract, or that individual constraints or exceptions on that day prevent all available shifts for the agent.

**Warning[8]** No shifts match the constraints for agent {A} on day {B}; agent assigned a day off.

Scheduler is forced to schedule a day off for this agent because no shifts match the agent's contract constraints for this day. If a shift is configured to be available on this day, then this warning signals a bad configuration of either the shift or an associated meal. Verify that the durations for the shift and meal are valid.

**Warning[9]** Meal {A} is removed from shift {B} since it does not fit shift start/end constraints.

There is inconsistent data. For example, shifts are defined with a meal, but there is no way to schedule such a meal in the shift. In this case, the meal is removed from the definition of the shift, and the meal is ignored. This shift will not be used for scheduling. This is often reported along with Warning[8], described above.

**Warning[10]** Understaffed for day {A}, activity {B}, timestep {C}:{D} agents requested, {E} agents available.

There are not enough agents scheduled for this timestep to cover the specified activity.

**Warning[11]** Adjacency constraints force a day off for agent {A} on day {B}.

The minimum interval between two working days (as defined in Policies/Site Rules) cannot be satisfied. Therefore, Scheduler is forced to assign the agent a day off.

**Warning[12]** Break constraints were relaxed for agent {A} on day {B} in order to schedule breaks.

Scheduler is unable to schedule a break that complies with all constraints for this agent on the specified day, but assigns the most optimal breaks possible given the constraints.

**Warning[13]** Agent {A} has requested too many availability preferences; the maximum allowable was {B}; therefore, the satisfaction percentage has been decreased to {C}.

The agent has requested more availability preferences than Scheduler could assign. Therefore, the preference fulfillment percentage has been decreased. This can happen when constraints, such as day-to-day distance, shift occurrences, or start-time synchronicity, make it impossible to satisfy all the preferences. It can also arise if the days-off constraint conflicts with a shift preference.

**Warning[14]** Meal {A} is in conflict with meal {B} for shift {C}.

Two meals or shift splits conflict on a given shift. In this case, the first of these two meals or splits is removed from the shift.

**Warning[15]** Agent {A} has made few availability preference requests; the minimum expected was {B}, therefore, the satisfaction percentage has been increased to {C}.

The agent has made very few availability preference requests. Because Scheduler was able to assign most or all the preferences, the preference fulfillment percentage has been increased. This can happen when an agent is set to work at a time that coincides with his or her availability preference, as in the case of synchronicity constraints.

**Warning[16]** The timestep constraint {A} is not satisfied for initial values of meal {B}.

When you specify the starting timestep for a meal, you must satisfy other constraints. (For example, ensure that the meal does not overlap with other schedule items.)

**Warning[17]** Historical data missing for agents; therefore, planning period constraints are ignored.

The schedule period begins after the first day of the planning period but there is no historical data for the planning period. Because there is no way to know how much the agent has already worked before the schedule was built, planning period constraints are ignored for this planning period only. One workaround is to publish a schedule covering the dates before the dates of the schedule that generated this message.

**Warning[19]** This warning may say one of the following:

- The Meeting {A} could not be scheduled.
- The Meeting {A} could not be scheduled on day {B}.
- The Meeting {A} could not be scheduled on days {B}-{C}.

The desired meeting cannot be scheduled as entered. Either no day was found that would satisfy the meeting requirements or the meeting could not be scheduled for certain dates.

**Warning[20]** Not enough seats on day {A} at time {B}.

There are not enough seats for the scheduled agents for this timestep. In some cases, this can produce violations of the agent hours and/or day-off constraints.

**Warning[21]** Not enough seats on day {A}, at time {B} and activity {C}.

The Maximum-Number-of-Seats constraint for the specified activity does not allow all agents to be scheduled. Scheduler schedules the agents anyway, but for each timestep during which there are more agents than seats, it generates this warning. The use of the maximum-seats constraint for each activity is for multiskilled scheduling only. Possible causes of this warning include insufficient flexibility in hours and/or day-off constraints, forcing agents to work when they are not needed.

**Warning[22]** Seniority of agent {A} is given as level {B}. This is greater than 100,000; therefore, the seniority level is set to 100,000.

The specified agent has a seniority greater than 100,000. This should not occur in normal use of Workforce Management.

**Warning[23]** The date interval {A} to {B} of constraint {C} is not included in the fine-grain period, so the outside part of this constraint is ignored.

This constraint extends for a longer period than the schedule period. Only the period covered by the schedule is "fine-grained." Constraints that extend past the schedule period are not considered during schedule building. This situation should not occur in normal Workforce Management use.

**Warning[24]** An incompatible shift preference and paid-hours exception on day {A} for agent {B}; therefore, the exception wins.

Both a preference and granted paid hours have been set in Staff. Scheduler accepts the paid hours and ignores the shift preference.

**Warning[25]** Consider that team, maxseats, day-to-day, weekly, and monthly constraints are soft for agent {A} on day {B}.

You can override soft constraints in case a scheduling conflict occurs. Possible causes include:

One or more agents have a rotating schedule that forces them into conflict with team-synchronicity constraints.

An agent has an exception that requires a shift outside of the team start time window.

The maximum-seats constraint could not be adhered to, usually because the configuration does not allow enough flexibility in day-off and paid-hours assignments.

A coupling of weekend day-off and min/max/consecutive day-off constraints can force violations. Violations of weekly and/or monthly constraints usually indicate a significant configuration problem.

**Warning[26]** Rest (compensation) for agent {A} on day {B} lowered weekly/monthly goals by {C} hours.

A paid day off (a "bonus" paid day off in addition to regular days off) has been scheduled for the agent on the specified day. Therefore, weekly and monthly workload goals have been decreased by a certain number of hours.

**Warning[27]** Rest (compensation) for agent {A} on day {B} raised weekly/monthly goals by {C} hours.

A paid day off (a "bonus" paid day off in addition to regular days off) has been scheduled for the agent on the specified day. Therefore, weekly and monthly workload goals have been increased by a certain number of hours.

**Warning[28]** Forced day off for agent {A} on day {B} lowered weekly/monthly goals by {C} hours.

Conflicting contract constraints will force the agent to have the day off. Usually, this is due to a combination of min/max/consecutive day-off and weekend day-off rules. It can also be caused by shift rejections.

**Warning[29]** Cannot meet shift maximum occurrences constraint for agent {A} and shift {B}.

Scheduler is unable to schedule a different shift, in violation of the constraint for maximum shift occurrence. This can occur if another shift is rejected or not available because of configuration constraints. It can also be caused by the start-time synchronicity constraint if alternate shifts do not allow the synchronicity constraint to be observed.

**Warning[30]** Cannot meet shift minimum occurrences constraint for agent {A} and shift {B}.

Scheduler is unable to meet shift constraints with regard to minimum number of hours/days configured for the specified agent and shift. See Warning[29], above.

**Warning[31]** Failed to satisfy constraint of type {A} for agent {B}.

Scheduler was unable to assign the schedule items for the agent required by the specified constraint. Usually, this is due to a conflicting combination of constraints.

**Warning[32]** Cannot assign a day-off period needed for agent {A}.

The agent is due for a day off in order to comply with the specific day-off period constraint, but Scheduler could find no possible time window in which to schedule a day-off period. This situation can sometimes occur if the minimum number of days per week or weekend-days per month requires a pattern of days off that is incompatible with the day-off period constraint.

**Warning[33]** Even breaks with relaxed constraints could not be scheduled for agent {A} on day {B}.

Scheduler could not assign any breaks to the agent on the specified day.

**Warning[34]** The start-step constraint {A} is not satisfied for initial values of shift {B}.

Check that the shift start time is compatible with the timestep requested.

**Warning[35]** Scheduler could not assign days off for agent {A}.

Due to a conflict in constraints, Scheduler could not produce a satisfactory day-off sequence for this agent. Usually, this is due to a combination of minimum/maximum/consecutive day-off and weekend day-off rules.

**Warning[36]** {A} percent of activity {B} coverage has deteriorated on account of after-scheduling swaps on day {C}.

Because of seniority considerations, the coverage for the specified activity has diminished by a certain percentage. This percentage is based upon the agents that had their schedules changed to account for seniority rights. If this effect is undesirable, change the Loose or Free setting in the Schedule Build Wizard to Strict.

**Warning[37]** Agent {A} has requested very few availability preferences. {B} requests were granted; therefore, the satisfaction percentage has been increased to {C}.

The agent has made few availability preference requests. A certain number has been granted; therefore, the preference fulfillment ratio has been increased by the specified amount.

**Warning[38]** Agent {A} has made too many availability preference requests. {B} requests were granted; therefore, the satisfaction percentage has been decreased to {C}.

The agent has made many availability preference requests. Only the specified number could be granted; therefore, the preference fulfillment ratio has been decreased by the indicated amount.

**Warning[39]** Agent {A} has requested very few shift preference requests. {B} requests were granted; therefore, the satisfaction percentage has been increased to {C}.

The agent has made few shift preference requests. More than the expected number has been granted; therefore, the preference fulfillment ratio has been increased by the specified amount.

**Warning[40]** Agent {A} has made too many shift requests. {B} requests were granted; therefore, the satisfaction percentage has been decreased to {C}.

The agent has made many shift preference requests. Only the specified number could be granted; therefore, the preference fulfillment ratio has been decreased by the indicated amount.

**Warning[41]** Scheduling period begins in the middle of the month and no scheduling history is provided.

No schedule has been published for the beginning of the first schedule month.

**Warning[42]** Work constraints starting on {A} and ending on {B} for agent {C} cannot be satisfied.

Because of conflicts in constraint settings, workload constraints for this agent cannot be fulfilled for the specified days.

**Warning[43]** Planning period work constraint for the dates {A} - {B} for agent {C} cannot be satisfied.

Because of conflicts in planning period constraint settings, workload constraints for this agent cannot be fulfilled for the specified days.

**Warning[44]** Agent {A} cannot be swapped because of either a nonstandard shift, a forced day off, or an infeasible day-off sequence within the swap period.

The specified agent's schedule cannot be given to any other agent because it contains fixed elements that cannot be exchanged.

**Warning[45]** Schedule for agent {A} cannot be assigned to anyone; therefore, this agent has been removed from swap post treatment.

Because this agent's schedule is not valid for any other agent, it cannot be exchanged during swapping.

**Warning[46]** No activity was found for agent {A} on day {B} at timestep {C}; therefore, a forced break was assigned.

None of this agent's assigned activities are available during the specified timestep(s). Therefore, Scheduler was forced to assign a break. This situation occurs when the agent's activities are all exclusive and could not be assigned without violating the minimum-duration-for-exclusive-activity constraint.

**Warning[47]** Agent {A} has no nonexclusive activity for day {B}.

All of this agent's activities are contained in exclusivity sets, which limit how the agent's activities can be scheduled. These constraints might create some periods during this agent's workday when no activity can be scheduled.

**Warning[48]** For day {A}, agent {B} can work only on exclusive activity and is useless according to charge. Therefore, activity distribution might be inconsistent.

The agent has been configured to work on an activity for which the forecast predicts no interactions. The assignment of the agent to the unnecessary activity might degrade workload coverage.

**Warning[49]** The paid exception or time off was removed on day {A} for agent {B} to find feasible shift.

A part-day exception or time off that violates shift settings has been removed so that Scheduler can assign this agent a shift.

**Warning[50]** The Day Off per Period constraint configured for agent {A} is incorrect.

**Warning[51]** Ignored activity {A} matching no task sequence of {B}.

Scheduler is not using the specified activity because, although it is included in the activity set configured for the task sequence, its constraints do not match the task sequence constraints.

**Warning[52]** Break {A}, anchorage to start implies minimum/maximum lengths from start to be equal.

Because this break is anchored to the shift start time, the distance between the shift start time and the break start time cannot vary.

**Warning[53]** No shift of {A}'s contract can match preferences on day {B} (ignore).

**Warning[54]** Preference requirement on period ({A}..{B}) for agent {C} cannot be fulfilled, and is ignored.

**Warning[55]** Meal {A} does not fit in shift {B}. Shift can not be scheduled.

**Warning[56]** Time-window for day {A} of agent {B} reduced to [{C},{D}] to match activity open hours.

**Warning[57]** Break and meal sequence for [{A},{B}] duration of shift {C} was ignored as infeasible. Sequence: {D}

**Warning[58]** Break and meal sequence for [{A},{B}] duration of shift {C} contains no valid break combination.

**Warning[59]** Default break sequence for shift {A} is infeasible and there is no break sequence for work duration of {B}.

**Warning[60]** Exception is removed on day {A} for agent {B} as it is out of day time window.

**Warning[61]** Planning period hours limit granted preferences to {A} for agent {B}. Decreasing quotas to {C}.

**Warning[62]** More than {A} constraints were violated during dayoff scheduling. Further warnings will not be generated.

**Warning[63]** Single skill mode can not be used when task sequences are defined. Changing to multi-skill mode.

**Warning[64]** {A} constraint can not be satisfied for agent {B} starting at {C} and ending at {D}.

The specified constraint for this agent cannot be satisfied for the specified date interval.

**Warning[65]** Some breaks could not be scheduled for agent {A} on day {B}.

**Warning[66]** Maximum distance Shift Items constraint could not be satisfied for agent {A} on day {B}.

**Warning[67]** Minimum shift item distance constraint could not be satisfied for agent {A}.

**Warning[68]** Shift items could not be scheduled at configured time intervals for agent {A} on day {B}.

**Warning[1000]** Calendar item containing invalid shift ID={A} assigned to agent '{B}' on day {C}.

**Warning[1001]** Exception will be ignored for overnight shift of day {A} for agent '{B}'. Strict work time can not accommodate partially covered exception.

**Warning[1002]** Schedule start date weekday is not the same as long period start day. Moving long period back {A} days.

**Warning[1003]** Task sequence '{A}' was removed as it contains activity set '{B}' with no activities or assigned activities are not present in schedule scenario.

**Warning[1004]** Null element ignored in break meal list of shift '{A}'

**Warning[1005]** Both break and meal are not null element in break meal list of shift '{A}'

**Warning[1006]** Shift '{A}' task sequence ID={B} was not found.

**Warning[1007]** Agent '{A}' has no assigned contract. Agent will not be scheduled.

**Warning[1008]** Contract ID={A} assigned to agent '{A}' is unknown at site '{B}'.

**Warning[1009]** Agent '{A}' has accrual rule ID={B} that is not known to WFMServer.

**Warning[1010]** The team ID={A} of agent '{B}' does not exist at site '{C}'.

**Warning[1012]** Removed activity set '{A}' with no activities. Activities are either not present in schedule scenario or misconfigured.

**Warning[1013]** Removed task sequence '{A}' ID={B} since it contains invalid activity sets. Check prior warnings for activity set configuration problems.

**Warning[1014]** Removed agent '{A}' with no activities. Activities are either not assigned to agent, missing in schedule scenario or not configured properly.

**Warning[1015]** Minimum shift '{A}'s' paid duration is not covered by combine list. Minimum shift paid time changed to {B} hours {C} minutes.

**Warning[1016]** Task sequence ID={A} was removed from shift '{B}'. Task sequence may be misconfigured or contain not available activity set.

**Warning[1017]** Shift '{A}' was removed since it has no assigned mandatory task sequences.

**Warning[1018** One or more shifts assigned to contract '{A}' could not be used due to configuration problems.

Not all shifts that were assigned to contract could be used for scheduling. This warning usually is issued after more detailed shift configuration warnings.

**Warning[1019]** Agent '{A}' will not be scheduled. Scenario activities can not be used in any one of task sequences of contract shifts.

Schedule scenario does not contain activities that are required in order to schedule shifts with mandatory task sequences.

**Warning[1020]** Activity sets will be used for scheduling even though task sequences exist in the site.

Task sequences exist in the database but are not assigned to the shifts.

**Warning[1021]** Removed contract '{A}'. Shifts assigned to this contract are not configured properly.

Contract has no useable shifts, and therefore the contract is removed from scheduling. Shift configuration problems are described in other warnings.

**Warning[1022]** Removed agent '{A}' with mis-configured contract.

Contract that was assigned to agent cannot be used. This warning usually follows warning 1021.

# Errors List

**Note:** When Schedule building or validation generates the following errors, the variable text shown here in braces { } is replaced with the actual value.

**Error[1]** Shift {A} violates contract constraints for agent {B} on day {C}.

**Error[2]** The constrained start and end times {A} and {B} are not compatible with imposed activity for agent {C} on day {D}.

**Error[3]** No shift was found for agent {A} on day {B}

**Error[4]** Schedule build was canceled by user.

**Error[5]]** Wrong time unit for timestep {A}.

**Error[6]** Wrong scheduling start date {A} and/or end date {B}.

**Error[7]** Length of break {A} is not a supported break length.

**Error[8]** 0 is not a valid value for minimal daily workload in contract {A}.

**Error[9]** The minimum/maximum constraints for contract {A} make it impossible to schedule.

**Error[10]** The minimum weekly workload cannot be reached for contract {A}.

**Error[11]** The minimum planning period workload cannot be reached for contract {A}.

**Error[12]** The day {A} that was given is outside the planning period.

**Error[13]** On day {A}, activity {B} has not been declared.

**Error[14]** On day {A}, the charge specification for activity {B} cannot be processed.

**Error[15]** On day {A}, the charge specification for activity {B} has the wrong length.

**Error[16]** The code for contract {A} given for the agent {B} is not valid.

**Error[17]** The activity string {A} given for the agent {B} is not valid.

**Error[18]** Too many consecutive days worked: {A} days worked prior to the planning period for the agent {B}.

**Error[19]** The month goal {A} for agent {B} conflicts with the contract {C}: minimum {D}, maximum {E}.

**Error[20]** Impossible to assign a weekend off in the first month to the agent {A}.

**Error[21]** The code number {A} is not valid to designate an agent.

**Error[22]** The team for agent {A} has already been assigned.

**Error[23]** The day-off type {A} for agent {B} is not valid.

**Error[24]** The preference weight {A} for agent {B} is not valid.

**Error[26]** The day off costs for day off type {A} are invalid.

**Error[27]** Impossible to schedule work for agent {A} on day {B} although required by exceptions or hard preferences.

**Error[28]** Wrong shift index: {A}

**Error[29]** Wrong meal index: {A}

**Error[30]** Schedule of agent {A} cannot be assigned to any other agent. Do not use this agent for after-scheduling swapping.

**Error[31]** Break length {A} is not a multiple of time unit {B}.

**Error[32]** The day-of-week indexed by number {A} is not valid. See definition of shift {B}.

**Error[33]** There is not enough memory for this problem {A}; adjust memory parameters.

**Error[34]** Too many activities configured: {A} is the maximum number of activities. Configured {B}.

**Error[35]** No other agent's schedule can be assigned to agent {A}. Remove this agent from after-scheduling swapping.

**Error[36]** Impossible to overwrite shift for agent {A} on day {B}: unpaid times and work length not compatible.

**Error[37]** Impossible to find acceptable shift for agent {A} on day {B}: forbidden by day-to-day distance constraint.

**Error[38]** Activity hours start time {A}, end time {B}, for activity {C} not compatible with scheduled hours.

**Error[39]** Request on day {A} and time {B} violates activity open hours for activity {C}.

**Error[40]** Contradictory requirements for agent {A} on day {B}: agent should be both present and off.

**Error[41]** Unable to satisfy week/month constraints after giving compensation rest for agent {A} on day {B}.

**Error[42]** At least one schedule in the preference list for agent {A} is not swappable for this agent.

**Error[43]** Too many shifts: the maximum number is {A}, but more than {B} were requested.

**Error[44]** Agent {A} was not in the initial list of swappable agents.

**Error[45]** Wrong preference time window for agent {C}: timestep {A} < timestep {B}.

**Error[46]** Rescheduling data of agent {A} on day {B} is inconsistent with the current meal definition. Restore initial settings before rescheduling.

**Error[47]** The list of time windows for a meeting between time {A} and time {B} is incorrect.

**Error[48]** The list that specifies the DOC set for agent {A} is not correct.

Note: DOC = Day-Off Constraint.

**Error[49]** The number {A} is not valid to designate a team.

**Error[50]** Weekly work constraint for agent {A} has invalid dates {B} and {C}.

**Error[51]** Rescheduling data of agent {A} on day {B} is inconsistent with current shift definition. Do not change it before rescheduling.

**Error[52]** Wrong break index: {A}

**Error[53]** Wrong activity index: {A}

**Error[54]** Wrong task sequence index: {A}

**Error[55]** Activity {A} already belongs to activity set {B} (hence cannot be included in activity set {C})

**Error[56]** Invalid break sequence({A}): all alternatives of the combine list must share the same unpaid length

**Error[57]** Invalid break sequence({A}): a sequence with no break must have minDuration=0

**Error[58]** Invalid task sequence({A}): mismatching start/end anchors

**Error[59]** Exclusive activities and task sequences cannot coexist

**Error[60]** No agent has been defined: solve aborted.

**Error[61]** More than {A} constraint failures during dayoff scheduling.

**Error[62]** Shortest shift item sequence for shift {A} has minimum duration of {B}. Sequence covering minimum shift duration is required.

**Error[63]** Shift {A} item sequence for longer shift contains less unpaid time ({B} minutes) than shorter sequence.

**Error[66]** Internal scheduling engine error.

**Error[1000]** Failed to load schedule scenario. Scenario ID={A}

**Error[1001]** Loaded schedule scenario does not contain required site. Scenario ID={A}, site ID={B}.

**Error[1002]** Specified schedule interval is {A} days. At least one week is required.

**Error[1003]** Specified schedule interval is {A} days long. Schedule period can not be longer than 6 weeks.

**Error[1004]** Specified schedule interval is {A} days long. Schedule period must contain exact number of weeks.

**Error[1005]** Invalid long period type={A} detected (more than 6 weeks or less than 0) for site '{B}'.

**Error[1006]** WFMServer returned 0 sites.

**Error[1007]** Site to be scheduled was not found in database. Site ID={A}.

**Error[1008]** Activities not found in the database for site '{B}'.

**Error[1009]** Activity '{B}' belongs to unknown activity set. Set ID={A}.

**Error[1010]** Task sequence '{B}' references activity set ID={A} that is not defined in database.

**Error[1011]** Task anchor value {A} is incorrect for sequence '{B}' task index={A}.

**Error[1012]** Unknown break ID={A} assigned to shift '{B}'.

**Error[1013]** Unknown meal ID={A} assigned to shift '{B}'.

**Error[1014]** Meal ID={A} is in combine list but not assigned to shift '{B}'.

**Error[1015]** Break ID={A} is in combine list but not assigned to shift '{B}'.

**Error[1016]** Can not create schedule. Schedule scenario or configuration is not valid.

**Error[1017]** Synchronize work start threshold value {A} is out of range [-1, 6]—for site '{B}'.

**Error[1018]** Can not schedule task sequences in single skill scheduling mode. Use multi-skill scheduling instead.

**Error[1020]** Unknown calendar item exception type ID={A} assigned to agent '{B}' on day {C}.

**Error[1021]** No activities configured for scheduling. Check schedule scenario and configuration.

**Error[1022]** No contracts configured for scheduling. Check schedule scenario and configuration.

**Error[1023]** No shifts configured for scheduling. Check schedule scenario and configuration.

**Error[1024]** No agents configured for scheduling. Check schedule scenario and configuration.

**Error[1025]** Long period start date is not defined for site '{A}'.

**Error[1026]** Cannot reschedule. Previous schedule was created with incompatible version of WFM Builder.

**Error[1027]** Cannot reschedule. Shift from original schedule is no longer available.

**Error[1028]** Cannot reschedule. Meal from original schedule is no longer available.

**Error[1029]** Cannot reschedule. Meal assignment to shifts have changed.

**Error[1030]** Cannot reschedule. Shift assignment to contracts have changed.

**Error[1031]** Cannot reschedule. Shift configuration has changed.

**Error[1032]** Cannot reschedule. Task sequence from original schedule is no longer available.

**Error[1035]** No daily agent schedules are available for schedule re-optimization.

**Error[1066]** Internal error.

**Error[1067]** Not enough memory to build the schedule. {A} MBytes of free memory is required.

**Error[1068]** WFM Builder failed to save schedule.

**Error[1069]** WFM Server communication problem: {A}.

**Error[1070]** WFM Server communication problem.

**Error[1071]** Configuration Server communication problem: {A}.

**Error[1072]** More than one WFM Server specified in Builder connections.

**Error[1073]** WFM Server not specified in application connections.

**Error[1074]** Failed to retrieve WFM Server '{A}' information.

Chapter

# 6 Trading

Use the Trading module to review, and accept or decline, agents' proposed schedule trades. The features of this module are:



## 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 canceled. 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 following sections describe how a schedule trade proceeds to approval or rejection:

- Trading Summarized
- Requirements for a Successful Trade
- How Trades Get Tested for Automatic Approval
    - Exceptions' Trade Conditions
    - Auto-Decline Conditions
    - Auto-Approval Conditions
    - Supervisor Approval Conditions
    - Auto-Cancel Conditions
    - Expiration Conditions

## Trading Summarized

A trade can include up to one full week 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. The approval can be either automatic (by WFM Web) or explicit (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 or site.

If a trade is approved, it is *executed* and both agents' schedules change to reflect it. The trade no longer appears in most trading windows within WFM Web for Agents. (However, agents still see their own proposals in the WFM Web for Agents My Proposals window, even after the corresponding trades are executed.)

Not all trades are approved:

- Under certain conditions (for example, when one agent is not qualified for the other's scheduled activities), WFM Web 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 *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 Web's automatic approval or a supervisor's explicit approval.

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Note: At all steps 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.

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## How Trades are Tested for Automatic Approval

Once both agents have accepted a trade proposal, WFM Web 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 Web 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* or the *Keep with agent* rule.

Here is how WFM Web acts upon each trade rule:

**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 Web automatically declines a trade if any of the following conditions is true for any day included in the trade:

- Either agent's schedule overlaps with the overnight schedule from the previous day for a recipient agent.
- A trading proposal includes a day with the “do not trade” exception.

## Supervisor Approval Conditions

WFM Web 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 work durations.
- 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 Web automatically approves it and trades the schedules.

## Auto-Cancel Conditions

WFM Web 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.

The following sections cover:

- Displaying the list of trades
- Using the table
- Accepting or declining trades
- The Show data for drop-down list (Working Start/End Times, Total Paid Hours, or Shift Names)

## 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—**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.

**Total Paid—**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. Click 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 Working Hours—**Total working time for each day.

**Working Start/End Time—**Start and end times of agents' work. (Default display option.)

**Shift Names—**Names of agents' assigned shifts for each day.

# Trading Comments Dialog Box

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 Box

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.

**Sch. States—**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.

Chapter

# 7 Performance and Adherence

Use the Performance module to display performance statistics for Business Units, sites, and activities. The features of this module are:



This module includes a Monitor view for the most recently completed timestep, an Intra-day table view, an Alerts view, and a Graphs view.

All views display the following statistics, which are calculated by the WFM servers:

- **Interaction Volume**—Forecast and Actual number of interactions.
- **AHT (sec)**—Forecast and Actual average handling time, in seconds.
- **Abandoned Calls (%)**—Scheduled, Required, and Actual percentage of abandoned calls.
- **Service Level (%)**—Scheduled, Required, and Actual service level percentage.
- **ASA (sec)**—Scheduled, Required, and Actual average speed of answer, in seconds.

- **Staffing—**Scheduled (Sch.) and Required (Req.) number of agents 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, the scheduled staffing values may be expressed as fractions. Required staffing values are taken from the forecast and are always whole numbers.
- **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.).

Note: *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—**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.

Note: 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.

The following sections cover:

- Displaying the Monitor view.
- Using the Monitor view.

- Required data options.

# 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, and *R* for required.

Note: 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.

- Double-click any graph to display a graphical view of the corresponding statistic.

# Required Data Options

You can use the following buttons on the toolbar (these commands also appear in the Actions menu):

- **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.

You can also use the Performance drop-down list (to the right of Show Required) to jump to other Performance views.

# Performance Intra-Day View

Use the Intra-Day view to display performance statistics (both summarized and detailed) in a grid.

The following sections cover:

- Displaying the Intra-Day view.
- Reading and navigating the grid.
- Display, copy/paste, and other options.

## 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.

## 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 Current Day view, which shows all of the timesteps, from midnight to midnight, of the current day.

- To use the current-day view, select **Current Day** from the Actions menu.

Note: 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-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:

**Interaction Volume—**Forecast and Actual number of interactions.

**AHT (sec)—**Forecast and Actual average handling time, in seconds.

**Abandoned Calls (%)—**Scheduled, Required, and Actual percentage of abandoned calls.

**Service Level (%)—**Scheduled, Required, and Actual service level percentage.

**ASA (sec)—**Scheduled, Required, and Actual average speed of answer, in seconds.

**Staffing—**Scheduled (Sch.) and Required (Req.) number of agents 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, the scheduled staffing values may be expressed as fractions. Required staffing values are taken from the forecast and are always whole numbers.

**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.).

Note: *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**—Number of scheduled (Sch.) and actually working (Act.) agents. For more information, see description of Headcount in the Master Schedule Summary view.

Note: Use the Show Required button to display or hide all of the Required columns.

### 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).

You can use the following buttons on the toolbar (these commands also appear in the Actions menu):

**Show Required—**Turns on and off the display of Required columns for all statistics. (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.)

**User time zone—**If this setting is configured in the WFM Configuration Utility, you can select this option to display performance data adjusted to the user's time zone, if it differs from that of the site. (This is also a toggle.)

**What if—**Opens the What If window for calculating "what if" scenarios based on the selected timestep's data.

**Use multi-site activities—**This button becomes enabled when you select a multi-site activity or business unit in the Objects tree. Click to display data for the selected multi-site activity.

**Current Day—**Click this button to switch from 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).

**Options—**Displays an Options dialog box with the logged in user's time zone selected.

You can also use the Performance drop-down list (to the right of Show Required) to jump to other Performance views.

# Performance Graphs View

Use the Graphs view to view a single performance statistic as a line chart. The displayed data is automatically refreshed at the conclusion of each 15-minute timestep, and represents the values from the most recent timestep.

The following sections cover:

- Displaying the Graphs view.
- Using the Graphs view.

## Displaying the Graphs View

1. In the Modules tree, select **Performance > Graphs.**

   The Graphs view appears. If you switched to this view from another Performance view, it retains your earlier Objects tree selection and shows a corresponding graph.

2. Select the enterprise, a business unit, activity group, 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 graph is updated to match it.

## Using the Graphs View

By default, you see a graph for the Interaction Volume statistic.

To switch to a different statistic:

- Select the statistic from the **View** drop-down list. The graph changes to match your selection.

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.

By default, the graph shows a rolling view. To switch from rolling to current-day view, select **Current Day** from the Actions menu.

- Rolling View—12 hours before and 12 hours after the current timestep
- Current-Day View—from midnight to midnight of the current day

### Toolbar Buttons/Actions Menu Options

You can use the following buttons on the toolbar (these commands also appear in the Actions menu):

**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.)

**User time zone—**If this setting is configured in the WFM Configuration Utility, you can select this option to display performance data adjusted to the logged in user's time zone, if it differs from that of the site. (This is also a toggle.)

**Use multi-site activities—**This button becomes enabled when you select a multi-site activity or business unit in the Objects tree. Click to display data for the selected multi-site activity.

**Current Day—**Click this button to switch from 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).

**Options—**Displays an Options dialog box with the logged in user's time zone selected.

You can also use the Performance drop-down list (to the right of Show Required) to jump to other Performance views.

## 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, click **Close,** or select a different view from the Objects tree or the Performance drop-down list.

# Performance Options Dialog Box

Selecting the Options button in Performance Intra-Day View or Performance Graphs View opens the Options dialog box with your time zone already selected.

To select another time zone:

1. Click the drop-down arrow to the right of the User Time Zone text box.
2. Select the time zone from the drop down list.
3. Click **Apply.**

Performance data is adjusted to the selected time zone.

# 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:

**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 calls (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—**Initial value is the scheduled coverage, which is also called Staffing in the Performance Intra-day View. 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 Coverage Scenario, click Close.

# Adherence

## Overview

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 Overview

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).

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# Adherence Details View

Use the Adherence Details view to examine individual agents' adherence statuses.

The following sections cover:

- Displaying the Adherence Details view.

- Reading the Details table.
- Customizing the table.

## Displaying the Adherence Details View

To display the Details view:

1. In the Modules tree, select **Adherence** > **Details module.**

   Or, if you are in the Adherence Graphical view, use the Adherence drop-down list (on the right side of the toolbar) to select **Details module.**
2. In the Objects tree, select teams or agents you want and then 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.

Note: 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.

## 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
- Shift start time (optional—use the Detail Options dialog box to select this column if you want to see it)

Note: 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 Filter Dialog Box

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) in 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 Filter using the following reason check box; then type the appropriate code in the text box to its right.

   Note: 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.

Notes:

- 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) in 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 using the WFM Configuration Utility are displayed in the Scheduled State Groups and Genesys State tabs.
- 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 Box

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.

2. To view the Shift Start column in the Adherence Details view, select the Shift Start 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.

3. To view the Site column in the Adherence Details view, select the Site check box. This column shows each agent's site.
4. Click **Apply.**

The Adherence Details view reappears. It is automatically updated to show the columns you selected.

# Adherence Graphical View

Use the Adherence Graphical view to see a pie-chart summary of agents' adherence states.

The following sections cover:

- Displaying the Adherence graphical view.
- How to read the chart.

## Displaying the Adherence Graphical View

To display the Graphical view:

1. In the Modules tree, select **Adherence** > **Graphical module.**

   Or, if you are in the Adherence Details view, use the Adherence drop-down list (on the right side of the toolbar) to select **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.

Note: 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.

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. This threshold is set in the WFM Configuration Utility, 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.

Chapter

# 8 Reports



## Reports Overview

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.
- The button with a square (Stop) icon duplicates your browser's Stop button.

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.

## 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.

   Adjust the report's destination folder and file name.
5. 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 tree, 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:

1. 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.

### Policies Reports

- Agent Properties Report—Includes hire date, contract, wage, and skills.
- Contract Properties Report—Includes daily, weekly, and monthly paid hours, synchronization settings, and days off.

- 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.

## 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.

## Saving Reports to Files

To export a report to a disk file:

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.**

# Configuration Reports

## Overview

The Configuration report summarizes the configuration settings for WFM objects. (For a complete list of all WFM reports, see the Reports List.)

The Configuration report is:

- Activity Properties Report.

### 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.

## 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:
3. Click once on a report's name in the working pane.
4. Or click the report's name in the Objects tree.

   After you select a report, the Reports Wizard's first screen, Header, appears.
5. To print a header on the report, select **Show Header** and type your header text into the text box.
6. Click **Next.**
7. Select the objects, dates, or other options you want to include in the report.

   The number of screens that follow the first one depends on the report you are creating.
8. Click **Next** after making your selections on each intermediate screen.
9. Make your selections on the final screen (which has a Finish button).
10. Click **Finish.**

A Progress message box appears. You can click its Cancel button to interrupt the report's generation.

When the report has been generated, the Report Viewer opens to display it. The report is also added to the Objects tree so you can review it later.

Note: For a detailed explanation of what is displayed in the report, see Activity Properties Report.

## Activity Properties Report

To Create an Activities Properties Report:

1. In the Modules tree, select **Reports** > **Configuration Reports.**

   A list of Configuration Reports appears in the working pane and in the Objects tree.

2. From either list, select **Activity Properties Report.**

   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.

### Table 3: Understanding the Activity Properties Report

| Item | Description |
|---|---|
| **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. If Minimum Staffing Level is configured as percentage in Configuration Utility, then the value is shown as a percentage; example: 20%. If set as agents, then this value is shown as a number; example: 20. |

**Table 3: Understanding the Activity Properties Report (Continued)**

| Item | Description |
|---|---|
| **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). |

# Policies Reports

## Overview

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.

### 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.

## 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:
3. Click once on a report's name in the working pane.
4. Or click the report's name in the Objects tree.

   After you select a report, the Reports Wizard's first screen, Header, appears.
5. To print a header on the report, select **Show Header** and type your header text into the text box.
6. Click **Next.**
7. 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.
8. Click **Next** after making your selections on each intermediate screen.
9. Make your selections on the final screen (which has a Finish button).
10. Click **Finish.**

A Progress message box appears. You can click its Cancel button 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 you can review it later.

Note: For detailed explanations of what is displayed in each report, click the name of the report in the bullet list above.

## Agent Properties Report

To create an Agent Properties Report:

1. In the Modules tree, select **Reports** > **Policies Reports.**

   A list of Policies Reports appears in the working pane and in the Objects tree.
2. From either list, select **Agent Properties Report.**

   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.

### Table 4: Understanding the Agent Properties Report

| Item | Description |
|---|---|
| **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 Configuration Utility. |
| **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 Type** | Time off type associated with time off rule. |
| **Bonus Time-Off Hours** | The number of time-off hours earned in addition to that accrued by the usual time-off rules. |
| **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 Time Off Rule became inactive for agent. |

To create a Contract Properties Report:

1. In the Modules tree, select **Reports** > **Policies Reports.**

   A list of Policies Reports appears in the working pane and in the Objects tree.

2. From either list, select **Contract Properties Report.**

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 to include in the report.

   You can expand business units to display their sites, and expand sites to display their contracts. You can select any combination of contracts from multiple sites.
6. Click **Finish.**

The report appears in the Report Viewer.

### Table 5: Understanding the Contract Properties Report

| Item | Description |
|---|---|
| **Site [header]** | The selected site, its time zone, and the first selected contract name. |
| **Daily Working Hours (Min, Std, Max)** | The daily minimum, standard, and maximum working hours defined for each contract in the report. |
| **Weekly Working Hours (Min, Std, Max)** | The weekly minimum, standard, and maximum working hours defined for each contract. |
| **Schedule Planning Period Working Hours (Min, Std, Max)** | The minimum, standard, and maximum working hours defined for the user-defined Schedule Planning Period for each contract. |
| **Weekly Working Days (Min, Max)** | The minimum and maximum number of working days per week allowed for each contract. |
| **Daily Availability (Start and End Time)** | The start time and end time for each day of the week. A plus sign (+) before end time indicates the next day. |
| **Days Off** | The number of First Weekend Days, Second Weekend Days, and weekend combinations allowed or required for this contract |
| **Max. Consecutive Working Days** | Maximum number of days that an agent can work without a Day Off scheduled. |
| **Max. Consecutive Working Weekends** | Maximum number of consecutive weekends that an agent can have scheduled as working without Days Off. |
| **Synch. Period** | The length of time that the synchronization setting is applied. |
| **Synch. of Daily Schedules Flexibility** | If synchronization is selected, the amount of flexibility in synchronized start times. |
| **Synch. Type** | A rule that defines how synchronization will be performed during scheduling. |

**Table 5: Understanding the Contract Properties Report (Continued)**

| Item | Description |
|---|---|
| **Week Days Of Synch.** | Weekdays to which synchronization will be applied. |
| **Weekend First Day** | The day of the week when the weekend starts. |
| **Shifts** | The list of all shifts associated with the contract in Configuration Utility. |

# Shift Properties Report

To create a Shift Properties Report:

1. In the Modules tree, select **Reports** > **Policies Reports.**

   A list of Policies Reports appears in the working pane and in the Objects tree.
2. From either list, select **Shift Properties Report.**

   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.

**Table 6: Understanding the Shift Properties Report**

| Item | Description |
|---|---|
| **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. |

**Table 6: Understanding the Shift Properties Report (Continued)**

| Item | Description |
|---|---|
| **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.<br><br>**Index**—The position of the task-sequence item in the task sequence.<br><br>**Activity Set**—The activity set on which the agent can work during the specified task-sequence interval.<br><br>**Min Duration**—Minimum task sequence duration.<br><br>**Max Duration**—Maximum task sequence duration.<br><br>**Fixed Position**—Whether the task-sequence interval has strict bounds. Possible values are:<br>• Task is flexible within the earliest start, latest end interval.<br>• Start is fixed, end is flexible.<br>• End is fixed, start is flexible.<br>• Start and end are fixed. |

### Table 6: Understanding the Shift Properties Report (Continued)

| Item | Description |
|---|---|
| **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.)<br><br>**Allowed**—Specifies if this Shift Item Sequence be used while scheduling (value can be Yes or No).<br><br>**Index**—The position of the shift item in the Shift Item Sequence.<br><br>**Meal**—Meals that are assigned to this Shift Item Sequence.<br><br>**Break**—Breaks that are assigned to this Shift Item Sequence |
| **Break [if applicable]** | **Break Name**—The break associated with the shift.<br><br>**Index**—The position of the break in the shift's list of breaks. The same break may occur more than once.<br><br>**Duration**—The length of the break.<br><br>**in. Length From Shift Start**—The minimum distance between the start of the shift and the start of the break.<br><br>**Max. Length from Shift Start**—The maximum distance between the start of the shift and the start of the break.<br><br>**Min. Length from Shift End**—The minimum distance between the end of the break and the end of the shift.<br><br>**Paid Time**—Shows break is paid or not.<br><br>**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.<br><br>**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.<br><br>**Fixed Position**—Shows whether the break has to occur at a specific point in the shift. |

**Table 6: Understanding the Shift Properties Report (Continued)**

| Item | Description |
|---|---|
| **Meals [if applicable]** | **Meal Name**—The meal associated with the shift.<br><br>**Index**—The position of the meal in the shift's list of meals. The same meal may occur more than once.<br><br>**Earliest Start Time**—The earliest time this meal can start.<br><br>**Latest End Time**—The latest time this meal can end.<br><br>**Duration**—The length of the meal.<br><br>**Min. Time Before Meal**—The minimum distance between the shift's start time and the meal's start time.<br><br>**Min. Time After Meal**—The minimum distance between meal's end time and the shift's end time.<br><br>**Paid**—Whether the meal is paid or unpaid.<br><br>**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. In the Modules tree, select **Reports** > **Policies Reports.**

   A list of Policies Reports appears in the working pane and in the Objects tree.
2. From either list, select **Rotating Pattern Properties Report.**

   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.

   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.

**Table 7: Understanding the Rotating Pattern Properties Report**

| Item | Description |
|---|---|
| **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 Configuration Utility, the minimum Paid Hours for the weekly pattern. |
| **Max. Paid Hours** | If Use Weekly Paid Hours is selected in Configuration Utility, 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 All Activities was selected on the Rotating Pattern Available Activities dialog in Configuration Utility. |
| **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.

## 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 once on 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 screen, Header, appears.
3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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. 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.

6. Click **Next** after making your selections on each intermediate screen.
7. Make your selections on the final screen (which has a Finish button).
8. Click **Finish.**

A Progress message box appears. You can click its Cancel button 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.

Note: For detailed explanations of what is displayed in each report, see Time Off Report, Time Off Balance Report, or Calendar Items Report.

### 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. In the Modules tree, select **Reports** > **Calendar Reports.**

   A list of Calendar Reports appears in the working pane and in the Objects tree.
2. From either list, select **Calendar Items Report.**

   The Reports Wizard's first screen, Header, appears.
3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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. In the Date Range screen, select a start and end date for the report.
6. Optionally, you can select **Show comments** to control whether comments, 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, and Exceptions.
9. Click **Finish.**

Note: If Exceptions and Time Off are selected on Calendar Items page, you must specify Exceptions and Time Off.

The report appears in the Report Viewer.

**Table 8: Understanding the Calendar Items Report**

| Item | Description |
|---|---|
| **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** | Optional column. |

# Time Off Report

For the agents and dates that you select, this report displays granted, preferred, declined, and scheduled time off. Optionally, includes time-off balances for all the time-off types selected.

To create a Time Off Report:

1. In the Modules tree, select **Reports** > **Calendar Reports.**

A list of Calendar Reports appears in the working pane and in the Objects tree.

2. From either list, select **Time Off Report.**

   The Reports Wizard's first screen, Header, appears.

3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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. In the Date Range screen, select a start and end date for the report.
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 unit (if any), site, and time off type.
13. Click **Finish.**

The report appears in the Report Viewer.

**Table 9: Understanding the Time Off Report**

| Item | Description |
|---|---|
| **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 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 Balance Report:

1. In the Modules tree, select **Reports** > **Calendar Reports.**

   A list of Calendar Reports appears in the working pane and in the Objects tree.

2. From either list, select **Time Off Balance Report.**

   The Reports Wizard's first screen, Header, appears.

3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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. In the Date Range screen, select a start and end date for the report.
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**.

   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 unit (if any), site, and time off type.

8. Click **Finish.**

The report appears in the Report Viewer.

**Table 10: Understanding the Time Off Balance Report**

| Item | Description |
|---|---|
| **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. |

**Table 10: Understanding the Time Off Balance Report (Continued)**

| Item | Description |
|---|---|
| **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. |

# Forecast Reports

## Overview

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.

### 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:
3. Click once on a report's name in the working pane.
4. Or click the report's name in the Objects tree.

   After you select a report, the Reports Wizard's first screen, Header, appears.
5. To print a header on the report, select **Show Header** and type your header text into the text box.
6. Click **Next.**

7. 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.
8. Click **Next** after making your selections on each intermediate screen.
9. Make your selections on the final screen (which has a Finish button).
10. Click **Finish.**

A Progress message box appears. You can click its Cancel button 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.

Note: 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.

## Forecast Report

To create a Forecast Report:

1. In the Modules tree, select **Reports** > **Forecast Reports.**

   A list of Forecast Reports appears in the working pane and in the Objects tree.
2. From either list, select **Forecast Report.**

   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.**

   On the Date Range screen:

5. Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
6. Select Activity, Site, Multi-site Activity, or Business Unit from the drop-down list.
7. Click **Next.**
8. 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.
9. Click **Next.**

   On the Forecast Data Types screen, select the Data Types you want to include.
10. Click **Finish.**

The report appears in the Report Viewer.

### Table 11: Understanding the Forecast Report

| Item | Description |
|---|---|
| **Site Information or Business Unit Information or Enterprise [header]** | The site name and time zone, if you selected activity as the report's target.<br>The business unit name and time zone, if you selected multi-site activity or site as the report's target.<br>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. |

**Table 11: Understanding the Forecast Report (Continued)**

| Item | Description |
|---|---|
| **Statistics/Options [columns]** | The forecast value, for each period, for the display options that you selected in the wizard. The possible columns are:<br>• Interaction Volume.<br>• Average Handling Time.<br>• Calculated Staffing.<br>• Required Staffing.<br>• Service Level.<br>• ASA.<br>• Abandons Factor.<br>• Max. Occupancy. |
| **Total/Average for Activity/Site [footer]** | The total or average forecast value for each statistic shown in the table for this activity or site. |
| **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. In the Modules tree, select **Reports** > **Forecast Reports.**

   A list of Forecast Reports appears in the working pane and in the Objects tree.
2. From either list, select **Forecast Graphs Report.**

   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.**
5. On the Date Range screen:
   - Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
   - Select Activity or Multi-site Activity from the drop-down list.
   - Click **Next.**
6. 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.

7. If you selected Multi-site Activity as the target:
   - The Data screen is the Wizard's final screen. Click **Finish.**

   If you selected Activity as the target:
   - Click Next.
   - On the Forecast Data Types screen, select the Data Types you want to include.
   - Click **Finish.**

The report appears in the Report Viewer.

**Table 12: Understanding the Forecast Graphs Report**

| Item | Description |
|---|---|
| **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:<br>Interaction Volume.<br>Average Handling Time.<br>Calculated Staffing.<br>Required Staffing. |
| **Timestep / Day / Week of / Month / *X* weeks of [bottom labels]** | The time period covered by each bar in the graph. The period depends on the granularity that you selected in the wizard. |

# Schedule Reports

## Overview

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
- 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
- Weekly Schedule Report

### 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.

## 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 once on 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).
   - Click **Finish.**

A Progress message box appears. You can click its Cancel button 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.

---

Note: For detailed explanations of what is displayed in each report, click the name of the report in the bullet list above.

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## Activity Weekly Schedule Report

To create an Activity Weekly Schedule Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.
2. From either list, select **Activity Weekly Schedule Report.**

   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.**
5. Fill in the Date Range screen.
   - 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.
   - If necessary, select **Show Required Staffing** and/or **Show Paid Hours.**

- Click **Next.**

6. 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.

7. Click **Finish.**

The report appears in the Report Viewer.

**Table 13: Understanding the Activity Weekly Schedule Report**

| Item | Description |
|---|---|
| **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–Off.** | The agent's effective work hours per week. |
| **Weekly Work Hours–Nonlife.** | 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. |

**Table 13: Understanding the Activity Weekly Schedule Report (Continued)**

| Item | Description |
|---|---|
| **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 finished report is grouped by this hierarchy:
Enterprise
Business Unit
Site
Week date range
  Team
    Activity
      Agent

## Agent Comments Report

Note: This report presents information only for agents and days that have comments entered. The report is not generated if the selected agent schedule days have no comments.

To create an Agent Comments Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.

2. From either list, select **Agent Comments Report.**

   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.**

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.

**Table 14: Understanding the Agent Comments Report**

| Item | Description |
|---|---|
| **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. |

# Individual Schedule Report

To create an Individual Schedule Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.
2. From either list, select **Individual Schedule Report.**

   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.**
5. On the Date Range screen, select a Start and End date for the report. Then click **Next.**
6. 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.
7. Click **Finish.**

The report appears in the Report Viewer.

**Table 15: Understanding the Individual Schedule Report**

| Item | Description |
|---|---|
| **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. |
| **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. |

# Scheduled Budget Report

To create a Scheduled Budget Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.
2. From either list, select **Scheduled Budget Report.**

   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.**
5. On the Date Range screen, select a Start and End Date. Then click **Next.**
6. 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.
7. Click **Finish.**

The report appears in the Report Viewer.

**Table 16: Understanding the Scheduled Budget Report**

| Item | Description |
|---|---|
| **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. |
| **Overtime Budget** | The agent's pay for overtime work hours on the given day. |
| **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. |

# Schedule Marked Time Report

To create a Schedule Marked Time Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.

2. From either list, select **Schedule Marked Time Report.**

   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 Scenarios screen, select a schedule scenario or the Master Schedule. Then click **Next.**

5. On the Date Range screen, select start and end dates for the report. Then click **Next.**

   If you selected a scenario on the previous screen, you cannot select dates outside the scenario date range.

6. On the first Data screen, select the enterprise or the business units, sites, teams or 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.
7. Click **Next.**
8. 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.
9. Click **Finish.**

The report appears in the Report Viewer.

**Table 17: Understanding the Schedule Marked Time Report**

| Item | Description |
|---|---|
| **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. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.
2. From either list, select **Schedule Marked Time Totals Report.**

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.**
5. On the Date Range screen:
   - Select a granularity and a corresponding start and end date. (Your granularity selection may restrict your date selections.)
   - On the Target pane, select Agent, Team, or Site from the drop-down list.
   - Click **Next.**
6. 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.
7. 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.

**Table 18: Site Schedule Marked Time Totals Report**

| Item | Description |
|---|---|
| **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. |

**Table 18: Site Schedule Marked Time Totals Report (Continued)**

| Item | Description |
|---|---|
| **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. |

**Table 19: Team Schedule Marked Time Totals Report**

| Item | Description |
|---|---|
| **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. |

**Table 20: Agent Schedule Marked Time Totals Report**

| Item | Description |
|---|---|
| **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 States Report

To create a Schedule States Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.
2. From either list, select **Schedule States Report.**

   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 Scenarios screen, select a schedule scenario or the Master Schedule and then click **Next.**
5. On the Date Range screen, select Start and End Dates and Times for the report. Then click **Next.**

Note: You can select fewer weeks than are defined in the scenario that you selected in step 4.

6. 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.

7. Click **Next.**
8. 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.

9. Click **Finish.**

The report appears in the Report Viewer.

### Table 21: Understanding the Schedule States Report

| Item | Description |
|---|---|
| **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. |
| **Agent** | The agent whose information is displayed. |
| **Day** | 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. |

**Table 21: Understanding the Schedule States Report (Continued)**

| Item | Description |
|---|---|
| **Total Duration/Paid Hours for Agent** *(not labeled)* | **Note:** This total appears beneath the statistics for each agent.<br>Duration: The total duration of all the agent's schedule states during the time range covered by the report.<br>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** | **Note:** This total appears at the end of the report.<br>Duration: The total duration of all selected agents on each selected team.<br>Paid Hours: The total paid hours of all selected agents on each selected team. |
| **Total Duration/Paid Hours for Site** | **Note:** This total appears at the end of the report.<br>Duration: The total duration of all selected agents from all selected teams on the site.<br>Paid Hours: The total paid hours of all selected agents from all selected teams on the site. |

Notes: The durations of full-day time offs 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 offs and exceptions are equal to paid time.
- The durations of unpaid full-day time offs and exceptions are equal to Standard Daily Paid Hours from the agent's contract.

# Schedule Summary Report

To create a Schedule Summary Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.

2. From either list, select **Schedule Summary Report.**

   The Reports Wizard's first page, 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 Scenarios page, select a schedule scenario or the Master Schedule. Then click **Next.**
5. On the Date Range page:
   - 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.
   - 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.
   - 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.
   - Select the Target type—activity, 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.
   - Click **Next.**
6. 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), sites, and activities. If you select Site, the tree contains the enterprise, business units (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.
7. 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 “Appendix B: Metrics” in the current *Workforce Management Administrator's Guide*.

   The list of statistics includes these categories: Headcount, Service Level, Interaction Volume, AHT, Budget, Staffing, Difference, Coverage, ASA, Occupancy; and for each category 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.

8. Click **Finish.**

The report appears in the Report Viewer.

**Table 22: Understanding the Schedule Summary Report**

| Item | Description |
|---|---|
| **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.<br>The business unit's name and time zone, if you selected multi-site activity or site as the report's target.<br>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.<br>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. |

**Table 22: Understanding the Schedule Summary Report (Continued)**

| Item | Description |
|---|---|
| **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 State Totals Report

To create a Schedule Marked Time Totals Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.

2. From either list, select **Schedule State Totals Report.**

   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 and then click **Next.**
5. 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.**
6. On the Target screen, select Agent, Team, or Site from the drop-down list. Then click **Next.**
7. 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.
8. Click **Next.**

   On the second Data screen, select the schedule states to include.
9. Click **Finish.**

The report appears in the Report Viewer.

## Understanding the Schedule State Totals Report

The report takes one of three forms, depending on the target that you selected.

**Table 23: Site Schedule State Totals Report**

| Item | Description |
|---|---|
| **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. |

**Table 24: Team Schedule State Totals Report**

| Item | Description |
|---|---|
| **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. |

Notes: The durations of full-day time offs 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 offs and exceptions are equal to paid time.
- The durations of unpaid full-day time offs and exceptions are equal to Standard Daily Paid Hours from the agent's contract.

## Schedule Trade Report

To create a Schedule Trade Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

A list of Schedule Reports appears in the working pane and in the Objects tree.

2. From either list, select **Schedule Trade Report.**

   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, select a Start and End Date.

5. 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.**

6. 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.

7. Click **Finish.**

The report appears in the Report Viewer.

**Table 25: Understanding the Schedule Trade Report**

| Item | Description |
|---|---|
| **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 Validation Report

To create a Schedule Validation Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.
2. From either list, select **Schedule Validation Report.**

   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.

# Team Schedule Report

To create a Team Schedule Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.
2. From either list, select **Team Schedule Report.**

   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.
5. Optionally, click the Sort by shift start check box. Then click **Next.**
6. In the Date Range Page, select a Start and End date for the report. 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.

The report is sorted in alphabetical order by business unit, site name within each business unit, and team name.

8. Click **Finish.**

The report appears in the Report Viewer.

**Table 26: Understanding the Team Schedule Report**

| Item | Description |
|---|---|
| **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. |

## Team Weekly Schedule Report

To create a Team Weekly Schedule Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.

2. From either list, select **Team Weekly Schedule Report.**

   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.**
5. Fill in the Date Range screen:
   - Select a Start and End date for the report.
   - To include required staffing figures, select the Show Required Staffing check box.
   - Select a data type: **Start/End Time** or **Paid Hours.**
     You can select multiple weeks for the report output, but your selection must be full weeks.
   - Click **Next.**
   - 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.
6. 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.

### Table 27: Understanding the Team Weekly Schedule Report

| Item | Description |
|---|---|
| **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. (This column and the next two only appear if you selected the Show Paid Hours check box.) |
| **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.) |

**Table 27: Understanding the Team Weekly Schedule Report (Continued)**

| Item | Description |
|---|---|
| **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. |

### Presentation

The finished report is grouped by this hierarchy:
Enterprise
Business Unit
Site
Week date range
  Team
    Activity
      Agent

## Weekly Schedule Coverage Report

To create a Weekly Schedule Coverage Report:

1. In the Modules tree, select **Reports** > **Schedule Reports.**

   A list of Schedule Reports appears in the working pane and in the Objects tree.

2. From either list, select **Weekly Schedule Coverage Report.**

   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.**

5. On the Date Range screen, select a Start and End Date. Then click **Next.**
   - Select a Start Date and an End Date in the Data Range pane.
   - Select Show Required Staffing or Calculated Staffing in the Options pane.
   - Select one: Activity, Site, Multi-site Activity, or Business Unit from the drop-down list in the Target pane.
   - Click **Next**.

6. On the Staffing Type screen, you can optionally select **Show Required Staffing** and/or **Calculated Staffing**. Then click **Next.**
7. On the Target screen, select Activity, Site, Multi-site Activity, or Business Unit from the drop-down list. Then click **Next.**
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.

**Table 28: Understanding the Weekly Schedule Report**

| Item | Description |
|---|---|
| **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. |

# Performance Reports

## Overview

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.

### 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.

## 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 once on 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 screen, Header, appears.
3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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. 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 its Cancel button 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 to allow later review.

Note: For detailed explanations of what is displayed in each report, click the name of the report in the bullet list above.

## Actual Overhead Report

To create an Actual Overhead Report:

1. In the Modules tree, select **Reports** > **Performance Reports.**

   A list of Performance Reports appears in the working pane and in the Objects tree.
2. From either list, select **Actual Overhead Report.**

   The Reports Wizard's first screen, Header, appears.
3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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, select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
6. Click **Next.**
7. On the Data screen, select the sites that you want to include in the report.

   You can expand business units to display their sites. You can make multiple selections.

8. Click **Finish.**

The report appears in the Report Viewer.

**Table 29: Understanding the Actual Overhead Report**

| Item | Description |
|---|---|
| **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. |
| **Calculated Staffing** | The amount of overhead calculated in the forecast. |
| **% Working Overhead** | The percentage of agent time that is work related but not included in an activity. |
| **% Nonworking Overhead** | The percentage of time that agents are not working during paid hours. |
| **Scheduled Coverage** | The scheduled staffing coverage for an activity or multi-site activity. |
| **% Working Exceptions** | The percentage of time the agent is scheduled for Exceptions, if the Exception is defined as a working exception. |
| **% Nonworking Exceptions** | The percentage of agent time spent in non-work related exceptions, such as jury duty or sick leave. |
| **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. In the Modules tree, select **Reports** > **Performance Reports.**

   A list of Performance Reports appears in the working pane and in the Objects tree.

2. From either list, select **Workforce Performance Report.**

   The Reports Wizard's first screen, Header, appears.

3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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:
   - Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
   - Enter a **Percentage of Deviation Threshold.** (Periods whose actual values differ from the planned values by more than this percentage are listed as *noncompliant*.)
   - Select a time zone.
   - Select Activity, Site, Activity Group, Multi-site Activity, or Business Unit from the drop-down list.
   - Click **Next.**
6. On the Data screen, select the targets that you want to include in the report.

   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.

### Table 30: Understanding the Workforce Performance Report

| Item | Description |
|---|---|
| **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. |

**Table 30: Understanding the Workforce Performance Report (Continued)**

| Item | Description |
|---|---|
| **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. |
| **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. |
| **Head Count** | 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 no more 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. In the Modules tree, select **Reports** > **Performance Reports.**

   A list of Performance Reports appears in the working pane and in the Objects tree.

2. From either list, select **Contact Center Performance Report.**

   The Reports Wizard's first screen, Header, appears.

3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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:

   - Select a Granularity and a corresponding Start Date and End Date. (Your Granularity selection may restrict your Date selections.)

- Select a time zone.
- Select the Target type—activity, 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.
- Click **Next.**

6. On the Data screen, select the targets that you want to include in the report.
7. 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.
8. Click **Next.**
9. On the Performance Data Types screen, select the Data Types (statistics) that you want to include.
10. Click **Finish.**

The report appears in the Report Viewer.

**Table 31: Understanding the Contact Center Performance Report**

| Item | Description |
|---|---|
| **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. |
| **Head Count** | The scheduled and actual agents per period; the scheduled number minus the actual number; and the percent (%) difference. |
| **Interaction Volumes** | The forecast and actual interaction volume per period; the forecast minus the actual; and the percent (%) difference. |
| **AHT** | The forecast and actual average handling time per period; the forecast minus the actual; and the percent (%) difference. |
| **Service Level** | The scheduled and actual service level per period. |

**Table 31: Understanding the Contact Center Performance Report (Continued)**

| Item | Description |
|---|---|
| **ASA** | The scheduled and actual average speed of answer for each period. |
| **Abandons Factor** | The scheduled and actual abandons per period. |
| **Total/Average [footer]** | The total number of agents, interactions, and abandons across the report's time range; and the average of the AHT, service-level, and ASA values across the report's time range. |

## Contact Center Performance Graphs Report

To create a Contact Center Performance Graphs Report:

1. In the Modules tree, select **Reports** > **Performance Reports.**

   A list of Performance Reports appears in the working pane and in the Objects tree.
2. From either list, select **Contact Center Performance Graphs Report.**

   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:
   - Select a Granularity and a corresponding Start Date and End Date. (Your Granularity selection may restrict your Date selections.)
   - Select a time zone.
   - Click **Next.**
5. On the Data screen, select the activities that you want to include in the report.

   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.

**Table 32: Understanding the Contact Center Performance Graphs Report**

| Item | Description |
|---|---|
| **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. |
| **Forecasted/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 [bottom labels]** | 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. |

# Adherence Reports

## Overview

Adherence reports display adherence statistics at the business unit, site, team, or agent level. (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.

### 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.

# 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 you want:
   - Click once on 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 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. 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 its Cancel button 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.

Note: For detailed explanations of what is displayed in each report, click the name of the report in the bullet list above.

# Agent Adherence Report

To create an Agent Adherence Report:

1. In the Modules tree, select **Reports** > **Adherence Reports.**

   A list of Adherence Reports appears in the working pane and in the Objects tree.
2. From either list, select **Agent Adherence Report.**

The Reports Wizard's first screen, Header, appears.

3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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, select a Start date and End date for the report.
6. 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 nonadherent periods. If you leave this check box cleared, the report shows only the first of the consecutive nonadherent statuses that occurred during each schedule state.

   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.
7. Click **Next.**
8. On the Data screen, select the agent(s) to include in the report.
9. You can expand business units to display their sites, teams, and agents.
10. Click **Finish.**

The report appears in the Report Viewer.

### Table 33: Understanding the Agent Adherence Report

| Item | Description |
|---|---|
| **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. |

**Table 33: Understanding the Agent Adherence Report (Continued)**

| Item | Description |
|---|---|
| **% 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:<br>NC—Noncompliant time<br>UNC—Noncompliant time outside of scheduled time<br>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. |

# Adherence Totals Report

To create an Adherence Totals Report:

1. In the Modules tree, select **Reports** > **Adherence Reports.**

   A list of Adherence Reports appears in the working pane and in the Objects tree.

2. From either list, select **Adherence Totals Report.**

The Reports Wizard's first screen, Header, appears.

3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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, select a Granularity and a corresponding Start Date and End Date. (Your Granularity selection may restrict your Date selections.) Then click **Next**.

   In the Target section, select Agent, Team, or Site from the drop-down list.

   Optional: you can select the Exclude Days Without Shifts check box. Then click **Next**.

6. 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.

7. 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.

**Table 34: Site Adherence Totals Report**

| Item | Description |
|---|---|
| **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. |
| **% 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. |

**Table 35: Team Adherence Totals Report**

| Item | Description |
|---|---|
| **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. |

**Table 35: Team Adherence Totals Report (Continued)**

| Item | Description |
|---|---|
| **% of Adherence** | The percentage of time that 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**<br>**% Adherence per X Weeks**<br><br>**% Adherence per Month** | The average of the compliant time for all teams for the specified week.<br>The average of the compliant time for all teams, for a specified period of up to six weeks.<br>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. |

**Table 36: Agent Adherence Totals Report**

| Item | Description |
|---|---|
| **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. |
| **% 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**<br>**% Adherence per X Weeks**<br><br>**% Adherence per Month** | The average of the compliant time for all agents for the specified week.<br>The average of the compliant time for all agents, for a specified period of up to six weeks.<br>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. In the Modules tree, select **Reports** > **Adherence Reports.**

   A list of Adherence Reports appears in the working pane and in the Objects tree.

2. From either list, select **Agent States Report.**

   The Reports Wizard's first screen, Header, appears.

3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.

   Optional: To print the report in report 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, select a Start Date and End date for the report. Then click **Next.**
6. 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.

7. Click **Next.**
8. 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.
9. Click **Finish.**

The report appears in the Report Viewer.

### Table 37: Understanding the Agent States Report

| Item | Description |
|---|---|
| **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. |

**Table 37: Understanding the Agent States Report (Continued)**

| Item | Description |
|---|---|
| **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. |

# Audit Reports

Audit reports track user (supervisor) actions performed in the Calendar module and on the Master Schedule. (For a complete list of all WFM reports, see the Reports List.)

The Audit reports are:

- Calendar Audit Report
- Schedule Audit Report

## Report Security Restrictions

To create and print these reports, permission must be assigned through the Configuration Utility Reports Security Options.

## 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.

## Creating a Report

1. In the Modules tree, click **Reports** (to expand the report categories); then click the Audit Reports 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 once on 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 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. 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 its Cancel button 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.

Note: For detailed explanations of what is displayed in each report, see Calendar Audit Report or Schedule Audit Report.

## 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. In the Modules tree, select **Reports** > **Audit Reports.**

   A list of Audit Reports appears in the working pane and in the Objects tree.

2. From either list, select **Calendar Audit Report.**

   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.
   - 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.
   - Under Actions and Statuses, check boxes to indicate the actions and statuses that you wish to audit: Insert, Edit, Delete, Preferred, Granted, Declined and Recalled.
   - Under Calendar Items Date Range, do one of the following:
     - Select Start and End dates for the agent Calendar items you wish to audit.
     - Select the Any check box to select Calendar items in any date range. If checked, the Start and End date fields are disabled.
   - Under Options, select **Show comments** to control whether comments, if any, are shown on the report.
   - Under Sort Options, select one of the following:
     - By Agent name
     - By Supervisor name
     - By Timestamp date
     - By Calendar Item date

   Click **Next**.

5. On the Data screen, under Available Users, select the supervisors and other users/agents that you want to include in your report.

   Click **Next.**

6. 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**.

7. 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, and Exceptions.

8. 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.

**Table 38: Understanding the Calendar Audit Report**

| Item | Description |
|---|---|
| **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** | 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. In the Modules tree, select **Reports** > **Audit Reports.**

   A list of Audit Reports appears in the working pane and in the Objects tree.

2. From either list, select **Schedule Audit Report.**

   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.
   - 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.
   - Under Actions, check boxes to indicate the actions you wish to audit. Publish, Cleanup, Modify, or Trade.
   - 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.
   - 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.
   - 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.
   - 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.
7. 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.

**Table 39: Understanding the Schedule Audit Report**

| Item | Description |
|---|---|
| **Site [header]** | The selected business unit, site, and site time zone. |
| **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.<br>If you selected **Present action's details** on the Data Range screen, the following applies:<br>If the Action is Publish or Cleanup, the report lists all affected agents. |
| **Schedule Item, Start Time, End Time** | If the Action is Modify, the report shows the agent's schedule information for the modified day. The following additional columns are included: Schedule Item, Start Time, End Time. |

Appendix

# Glossary of Abbreviations

This appendix defines acronyms and abbreviations that appear on Workforce Management (WFM) screens and in the documentation.

**ACD**

Automatic Call Distribution

**ACW**

After Call/Contact Work

**AHT**

Average Handling Time; the average amount of time it takes incoming interactions to be distributed to agents. You can configure this statistic in the WFM Configuration Utility to include noninteraction time, such as After Call Work, as a part of the AHT.

**ASA**

Average Speed of Answer; the average amount of time agents take to respond to incoming interactions. WFM uses this statistic to calculate staffing forecasts, and as a basis for contact center performance values.

**CIM**

Customer Interaction Management; the Genesys Customer Interaction Management platform.

**CSV**

Comma-Separated Values; a format used in exporting data to a file, in which commas separate data elements.

**CTI**

Computer-Telephony Integration

**DAP**

Data Access Point

**DBO**

Database Owner; a set of user access privileges.

**FTE**

Full-Time Equivalent; an abstract term used to quantify a forecast and budget in human terms. The Endnotes section of Appendix B in the current *Workforce Management Administrator's Guide* explains how FTEs are calculated.

**GUI**

Graphical User Interface; elements of the screen display that are not words, including clickable icons.

**IOT**

Indirectly Occupied Time

**IV**

Interaction Volume; the number of interactions during a specific timestep or time period. Forecasted vs. Scheduled is a common comparison.

**JDK**

Java Development Kit; the Sun Java Development Kit.

**JVM**

Java Virtual Machine

**JSP**

Java Server Page; WFM Web uses Java Server Pages to create its dynamic web pages.

**MSA**

Multi-Site Activities; work activities that are handled at the site (child) level. In the object tree, they appear higher in the hierarchy than single-site activities.

**MSE**

Multi-Skilled Equivalent

**MSF**

Multi-Site Forecasting

**.MDB**

Microsoft Database format; a three-letter extension signifying the Microsoft Access database format.

**PTO**

Personal Time Off

**SCI**

Solution Control Interface; a Genesys Framework application.

**SCS**

Solution Control Server; a Genesys Framework application.

**SL**

Service Level

**SSE**

Single-Skill Equivalents

**UR**

Universal Routing; a Genesys application.

**WFM**

Workforce Management

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