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Workforce Management Administrator's Guide

Getting started

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Start planning the set up of your organization's workforce and learn how to enable user access to WFM's web interfaces.

Related documentation:

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Workforce Management (WFM) is a strategic asset in advancing your goals of providing the highest-quality customer service for the best value. In today's contact center, interactions take a multitude of forms, and agents may have a broad variety of skills. WFM creates forecasts and schedules for multi-skilled agents who are handling interactions in a variety of media, as well as for traditional single-skilled agent pool handling mostly voice interactions.

WFM enables supervisors to create proposed future schedules, agents to bid on those schedules, and supervisors to integrate the bids into real schedules.

WFM enables agents to request time off and specific working hours, and also to trade schedules with other agents, without sacrificing optimal staffing levels. Flexible agent scheduling can help improve agent retention, resulting in fewer new hires who require training before they can become effective promoters of your business.

WFM provides real-time contact-center performance and agent-adherence monitoring. You can immediately adjust the number of agents working on a specific activity if you see that the service-level statistics for that activity have fallen out of the acceptable range. Or, if the service levels are more than satisfactory, you can encourage agents to spend additional time up-selling new products, move them to another activity, or even give them time off.

Start planning

A good way to start your planning efforts is to become familiar with WFM's Configuration and Policy objects. These objects enable you to organize your workforce and set parameters that help you to effectively manage and simplify daily tasks. For details see Configuration objects and Policy objects.

Also, find articles under "Daily operations" in the table of contents that describe day-to-day tasks that a supervisor might perform.

WFM Web interfaces

WFM Web is a server application that provides content for two Web browser-based user interfaces, one for supervisors, one for agents. The agent interface can also be accessed on mobile devices using the Agent Mobile Client. The appropriate interface opens after login, depending on the login information you enter.

The contact center administrator or a supervisor provides agents with the URL to access WFM Web

for Agents on their desktop (for example, <http://:8080/wfm85x>) or smartphone (<http://:8080/wfm85x/m>). The agent simply enters their user name and password in the **Login** window.

- Web for Supervisors—Includes calendar management, forecasting, scheduling, real-time agent adherence, contact-center performance statistics, the configuration of email notifications, and reporting. These functions are all entirely accessible through any computer with a supported browser and network access.
- Web for Agents—Enables contact center managers to easily distribute schedule information to their employees and provides agents with proactive scheduling capabilities, such as entering schedule preferences, planning time off, schedule bidding, and trading schedules.
- Agent Mobile Client—Enables agents to use their mobile devices to access their schedules, enter schedule preferences, plan time off, trade schedules, and change their personal information settings.

Redesigned Web interfaces

Both the WFM Web Supervisor and Agent interfaces were redesigned and the previous applications (still available) were renamed WFM Web for Supervisors (Classic) and WFM Web for Agents (Classic). The Help was also renamed. See *Workforce Management Web for Supervisors (Classic) Help* and *Workforce Management Web for Agents (Classic) Help*.

Important

As of August 2019, the Web for Agents (Classic) UI is deprecated and will be unavailable in future releases. Genesys recommends that you change the configuration to display the current Agent UI instead of the Agent (Classic) UI. The latest Agent UI has feature parity with Web for Agents (Classic) UI.

Enabling Supervisors access

The latest Supervisor interface displays only the updated Forecast module, with all of the same functionality of the classic version, but with new controls, icons, and tools bars with which supervisors can perform Forecasting tasks. All other modules are accessible in the Supervisors (Classic) interface. To enable supervisors to access to the latest interfaces, some configuration is required. Ask your Genesys Professional Services representative to assist you with setting up access for your supervisors.

See also, the latest *Workforce Management Supervisor Help*

Enabling Agents access

The latest Agent interface displays all of the same functionality of the classic version, but with new controls, icons, and tools bars with which agents can perform their day-to-day tasks. Agents have access to the latest interface by default.

Agents can access the latest interface on their mobile devices by using the same URL as they do on their desktop.

See also, *Workforce Management Agent Help*.