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Workforce Management Administrator's Guide

Managing Overtime

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- Administrator

Enable supervisors to plan and track overtime hours for a single agent or multiple agents by specifying time intervals and activities.

Related documentation:

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WFM automates the overtime insertion process in the following ways:

- Finds the appropriate shift definition for the extended shift
- Schedules break/meals on the overtime part of the shift
- Designates overtime by specifying a marked type

Tip

Overtime functionality is available on the Master Schedule only. There is no overtime interface for Agents.

You can also enter overtime in the **Intra-Day**, **Agent Extended**, and **Weekly** views by inserting a work set with **Marked Time**. **Secondary** shifts and activities can be used to plan overtime.

Overtime requirements

In WFM Web for Supervisors, you can plan, define, and track how overtime requirements are met in the **Master Schedule > Overtime** view. To allow user access to this view, you must first set the user's security rights in the **Configuration** module. Select either **Roles > Role Privileges > Access Overtime Requirement** or **Users > Role Privileges > Access Overtime Requirement**.

Overtime data is displayed in a grid, which has an editable **Overtime Requirement** column and a read-only **Overtime Scheduled** column. The **Overtime Scheduled** column is calculated based on the scheduled **Marked Time** (ensure the **Overtime** option is checked). The following optional columns contain information that justifies the need for overtime hours (see the figure below):

- **Staffing**—Calculated and required staffing.
- **Difference**—Schedule coverage showing the difference between calculated and required.
- **Variance**—Equals the coverage minus the calculated, and is the anticipated unplanned overhead.

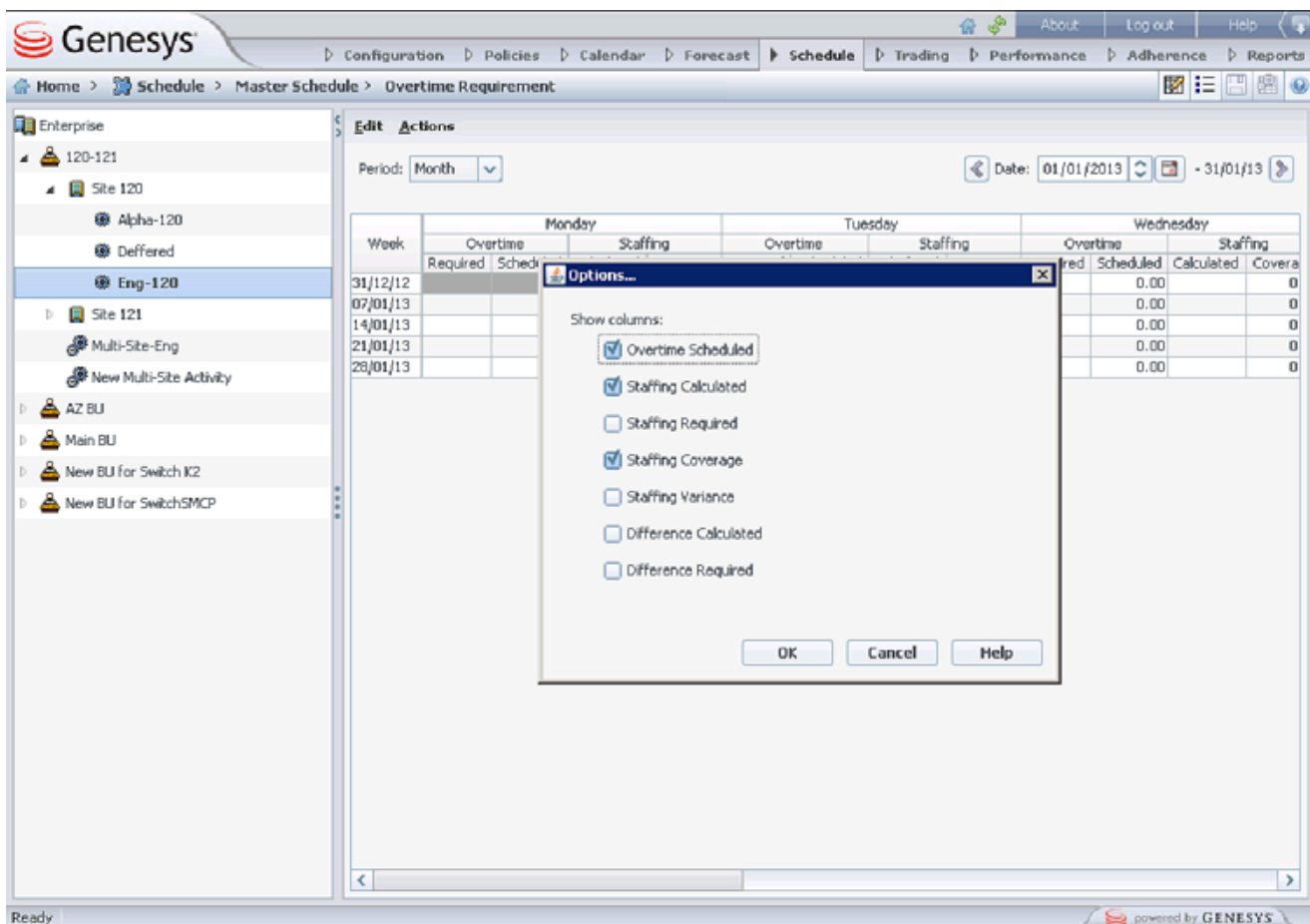


Figure: Overtime Requirement View with Monthly Granularity

Assigning secondary skill sets for overtime

Shifts are assigned to contacts in Web for Supervisors in the **Policies > Contracts** view (see the figure below) as either **Primary** or **Secondary**. **Secondary** assignments are used for overtime only and represent a broader set of constraints, while **Primary** assignments are used for other functionality.

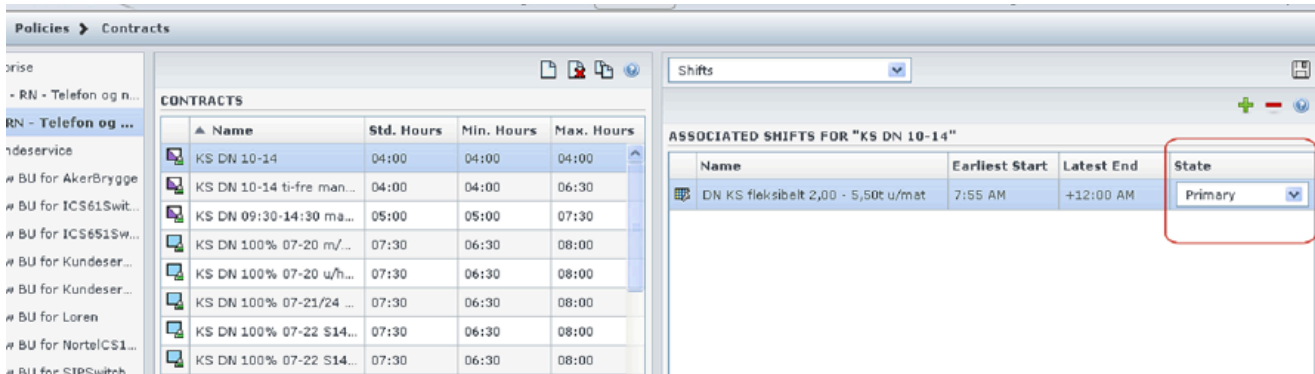


Figure: Web for Supervisors—Policies > Contracts > Shift Assignment

Secondary activities can be defined in one of two ways in Web for Supervisors in the **Configuration > Agents > Activities** view (see the figure below):

1. Assigning skills to the agent as **Secondary**
2. Assigning activities as **Secondary** with an effective date.

During overtime, agents can work on activities for which they are not normally scheduled. Therefore, entering overtime for an agent can change the agent's work day so that the usual shift definition no longer fits.

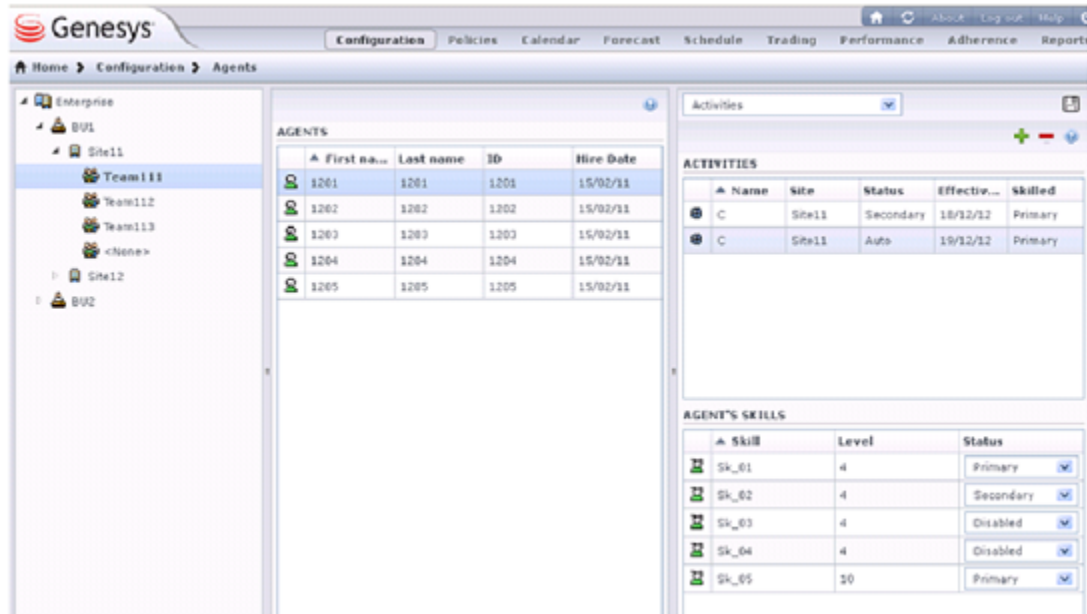


Figure: Web for Supervisors—Configuration > Agents > Activities View

Configuring overtime for individual agents

The **Overtime** view is available in the Master Schedule only. However, you must publish a scenario with the inserted work sets before the information can be seen in the Overtime view.

You can schedule overtime for an agent by inserting a work set and using **Marked Time** to mark it as overtime. Use one the wizards in the following views:

- **Insert Wizard—Schedule > Intra-Day, Agent-Extended** views (**Master** and **Scenarios**)
- **Insert Multiple Wizard—Schedule > Intra-Day, Agent-Extended**, and **Weekly** views (**Master** and **Scenarios**)

Setting overtime for agents

Purpose: To add an overtime work set for individual agents by using the **Insert Multiple Wizard** in WFM Web.

Start of Procedure

1. In the **Intra-Day, Agent Extended**, or **Weekly** view, select **Insert Multiple** from one of the following:
 - Actions toolbar
 - Actions menu
 - On the agent's schedule, Right-click and select the **Shortcut** menu (not in Weekly view)

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

2. In the **Insert Multiple Wizard**, select **Insert Work set**.
3. Create a new overtime work set by selecting **Marked Time** for the designated work type.

Important

You must select **Marked Time**. Otherwise, the resulting work set is not created as overtime (see the figure below). Also, inserting a work set over an existing shift can change the scheduled activities in the affected interval.

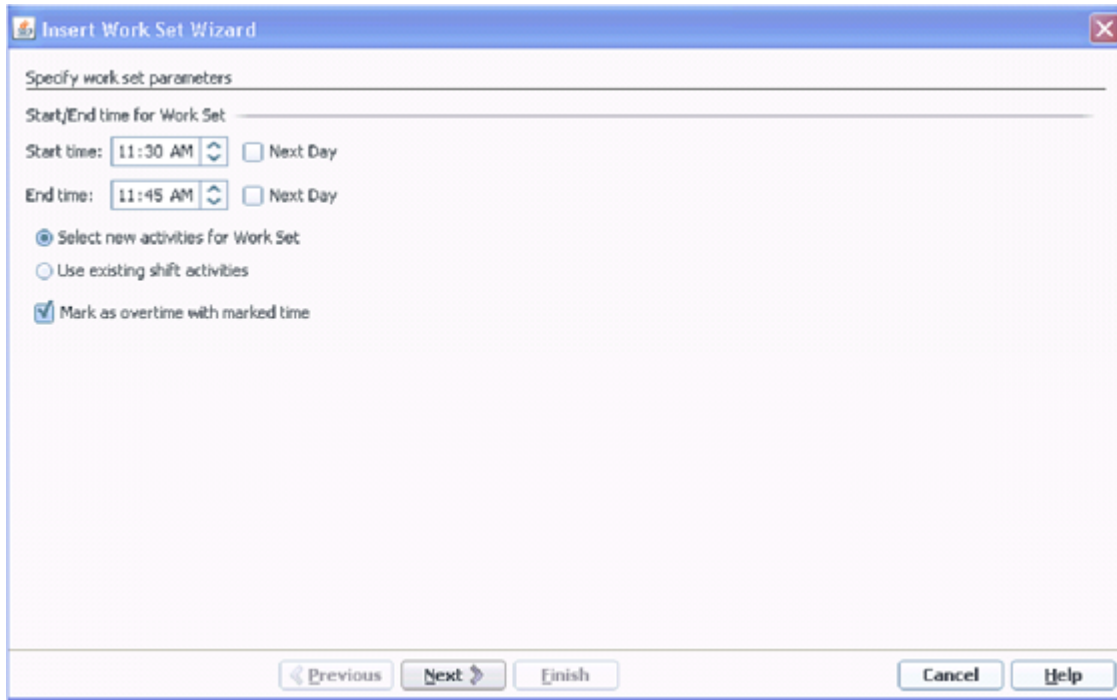


Figure: Insert Multiple Wizard—Inserting an Overtime Work Set

End of Procedure

Tracking scheduled overtime results

You can use the following views to track scheduled overtime results:

- **Schedule > Schedule Scenarios > Intra-Day** view in the **Performance Data** pane
- **Schedule > Master Schedule > Intra-Day** view in the **Performance Data** pane
- **Schedule > Master Schedule > Overtime** view

The **Performance Data** pane separates the scheduled overtime part of the coverage within the calculated staffing graph and distinguishes it from the overtime requirement. See the figure below.

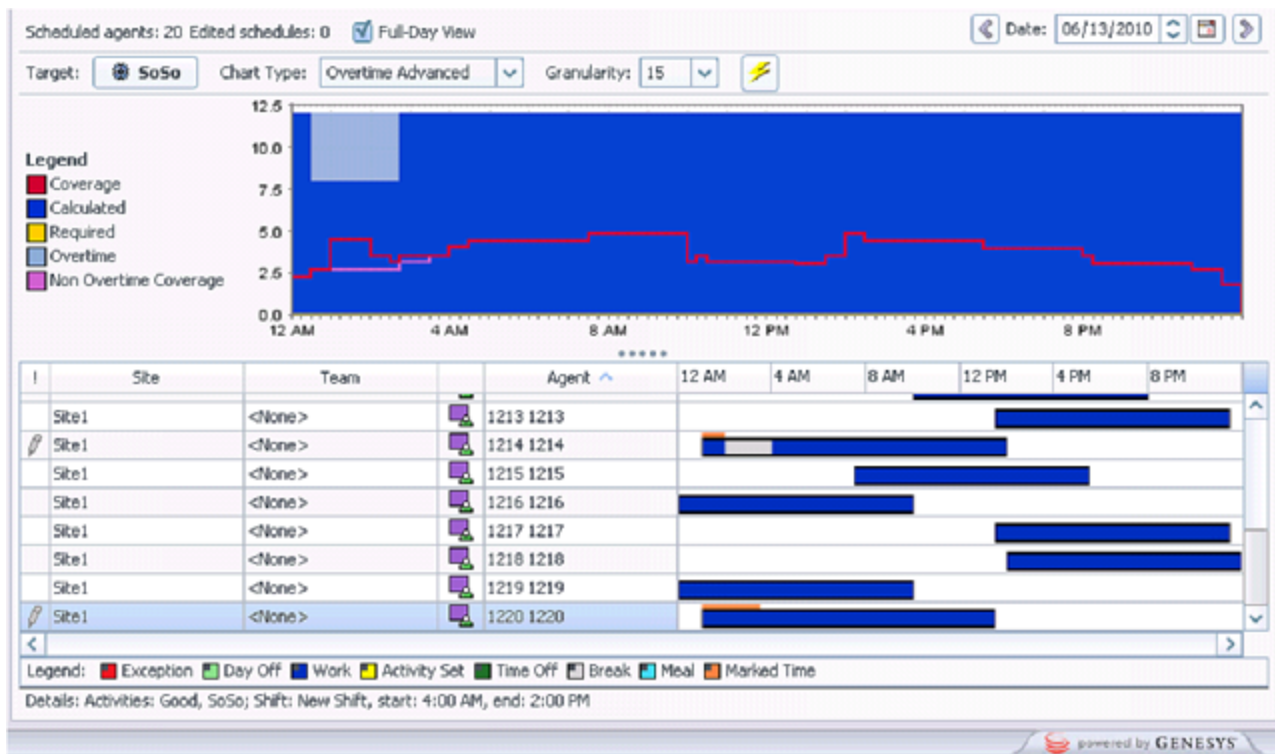


Figure: Calculated Staffing Graph—Full Day View

Overtime bidding

Supervisors with the appropriate role privileges can create Overtime Offers for a specific activity or multi-site activity in Web for Supervisors' **Overtime Bidding** view in the **Schedules** module. Offers are associated with the Master Schedule only and WFM uses the offer properties and other data in the automatic overtime scheduling process—the *other data* being the overtime slots chosen by agents when they are bidding on open offers.

Supervisors must have the Access Overtime Requirements and Overtime Bidding role privileges for the Schedule module. Then, they can track the overtime requirement that is currently scheduled, by checking the Marked Time that is denoted as "mark as overtime" in the agents' schedule for the activity or multi-site activity associated with the Overtime Offer.

Agents use the **Bidding** module in Web for Agents to see open schedules bidding scenarios or overtime offers, on which to bid. When they select an overtime offer, they can then choose the overtime slots they want to be added to their schedules. Agents see overtime offers only after the supervisor marks the offer as "open" and only if the supervisor has associated the agent and his/her site with the offer.

Continuous processing of overtime offers

You can enable WFM to continuously process Overtime offers, which have FIFO selected for agent bid ranking criteria. To enable this functionality, contact your Genesys representative.

For more information about Overtime bidding, see the *Workforce Management Web for Supervisors Help* and *Workforce Management Agent Help*.

For information about WFM Role Privileges see Assigning Roles to Users and [[PEC-WFM/Current/Supervisor/SchdIRIP]] topics in the *Workforce Management Web for Supervisors Help*.