Workforce Management Administrator's Guide

Calendar Management

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Use the Calendar to plan and manage meetings, time off, and exceptions before creating agents' schedules.

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Workforce Management's (WFM) unique agent-based scheduling approach enables robust agent-calendar management prior to scheduling. WFM can incorporate known obligations into agent schedules to ensure that agents can keep appointments and request adjusted shifts or working hours while WFM maximizes contact-center efficiency. By more accurately planning for known obligations, WFM can take the guesswork out of forecasting for staffing overheads, leading to more efficient use of the agent pool.

Planning and scheduling meetings

The Meeting Planner provides great flexibility when planning meetings. You select the meeting participants, define the range of time in which the meeting should occur, and set the duration of the meeting. You can configure recurring meetings, specifying either the number of occurrences or the start and end dates of the meeting series and the interval (weekly, for example).

The Meeting Scheduler builds the meeting into the work schedules of the participants during the scheduling process, finding the optimal times for agents' shifts and the meeting at the same time.

The meeting is included as an exception in all attendees' schedules. WFM displays the meeting exception in the Schedule views using the meeting short name, so you can find it easily when looking at schedules. If a sufficient percentage of participating agents is unavailable, then the meeting is not scheduled, and you receive a warning.

Additional functionality

Use the Meeting Scheduler...

- To insert meetings directly into multiple agent schedules as an exception after building the schedule.
- To create optimally-scheduled meetings within an existing schedule.

Use the Meeting Planner...

- To configure meetings that are pre-planned, such as recurring team meetings.

Play 'what if'...

- To add a meeting to a schedule that has already been built, and WFM will insert the meeting into the most optimal time slot, based on the list of participants.

Supervisors can use this feature to better determine the optimal meeting times that otherwise required manual calculation or guesswork.

Time off

You can use the WFM Web's Time Off Types view to configure multiple types of time off. Doing so enables you to set different characteristics for each type, define different rules for the accumulation of accrued time off and distribution of awarded time off, and fine-tune your record-keeping using the Time Off Report.

Time off can be accrued or awarded. The settings for these differ slightly, but both are configured in the WFM Web's Time-Off Rules view. You can configure separate time-off rules for each time-off type, or assign several time-off types to the same time-off rule, meaning all of the time-off types assigned to this rule share the time-off balance.

You can also associate multiple time-off rules with one time-off type. For example, you might want to have different accrual rules for agents with more seniority than for those who were recently hired. By assigning the appropriate time-off rule to each agent who receives time off of that type, you can determine the rate at which each agent accrues the time off.

Use the Calendar view in WFM Web for Supervisors to set time-off limits. You can set time-off limits for an activity, for a team, or for an entire site. You can also set different time-off limits for a specified period. For example, you might want to further limit time off because of special circumstances.

You can also set different time-off limits for various periods during the day. For example, you might permit more time off in the evening than in the busier morning.

Agents can view their balances for each time-off type and request time off in WFM Web for Agents. Agents can request both full-day and part-day time off. Supervisors can enter time-off requests into the WFM Web for Supervisors Calendar view.

Requested time off can be manually approved by the supervisor or automatically approved by WFM Web, based on agent time-off balances and the limits set on the number of agents with time off per activity, team, or site.

When the Scheduler runs, all time off that has been granted is scheduled. Additional time off can be scheduled, depending on whether it meets time-off limits and scheduling optimization constraints. Once time off is scheduled, agents can no longer edit or remove the time-off assignment using WFM Web for Agents.

Time off wait list

When a time-off request is made, but time off limits have already been reached, if the agent asks for the request to be wait-listed, the request remains in the WFM Calendar in a **Preferred** status, rather than being declined. Supervisors can view this *wait list* in the Calendar, sorting the time off requests by timestamp, and selectively grant time off requests.

Supervisors can grant agent time off for future periods, if the time off limits are raised, or if other

agents cancel their existing requests. This improves supervisor productivity by no longer requiring them to track these requests with a paper-based system.

Your supervisor can enable automatic approval (also known as *auto-granting*), which eliminates the need for that supervisor to approve your legitimate time-off requests.

Time off within bidding periods

You can enable time-off bidding by configuring bidding periods in WFM Web and associating them with sites within your enterprise. Agents within the site can submit multiple time off requests concurrently and WFM processes them within the specified bidding period. This configuration ensures that agent requests are all granted, declined, or wait-listed on the same processing date and eliminates the possibility of some requests for a vacation period being granted, while others are not. For details, see Time-Off Bidding.

Schedule exceptions

Exceptions are not work items but are additions to the schedule that must be taken into account to allocate agent time correctly. Examples of exceptions include meetings, training, and special projects.

Exception types

You create exception types based on the needs of your contact center. These types can be extremely flexible and you can link them to other WFM scheduling features. For example, you can specify that some exception types are used in meeting planning, and that some can be converted to a day off, if necessary.

Exceptions can be full-day or part-day. You can assign multiple part-day exceptions, assuming they do not overlap or otherwise violate internal WFM consistency checks.

Exceptions and preferences hierarchy

Exceptions and preferences are ranked in a hierarchy. This means that, if multiple exceptions and preferences are assigned for an agent on a single day, Calendar Management analyzes the assignments and immediately selects the highest-priority exception for assignment, noting the others as declined.

However, declined exceptions and preferences are stored in the WFM database, in case there are changes to calendar information later. If, for example, a training session is canceled, an agent's previously overridden day-off preference might then change status and be available for scheduling.