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Workforce Management Administrator's Guide

Enabling Wait-lists

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- Administrator

Use WFM's automatic approval process to initiate wait-listing for efficient handling of various types of time-off requests.

Related documentation:

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If WFM cannot immediately grant a time-off request, it puts the request on a waiting list (called *wait-listing*). When all requirements are met, including configuration, WFM can grant the request and insert it into the Master Schedule automatically.

Read on to find out more about these tasks:

- Automatic Approval (sometimes called auto-granting)
- Auto-publishing
- Wait-listing
- Handling preferred time-off requests
- Making ungranted time-off requests *count* in a build
- Improved viewing time-off availability

The information in this topic supplements the information found in *Workforce Management Web for Supervisors (Classic) Help* and *Workforce Management Web for Agents Help*.

Important

The features and functionality described in this article are not enabled by default. If you are interested in using these features in your environment, contact your Genesys Professional Services representative.

About wait lists

WFM considers all wait-listed time-off requests on a First-In, First-Out (FIFO) basis, using the date and time of the request. To determine if there are slots available for the wait-listed time-off request, the process first considers all time off instances that are **Granted/Granted** and **Scheduled** and have intersecting time steps with the wait-listed request for time off. If the **CalendarOverScheduleData** option is set, then **Granted/Not Scheduled** time off items are also taken into account before processing the wait-list.

Next, WFM considers all **Preferred** time-off requests that were submitted earlier than the wait-listed request that is currently being processed. Only **Preferred** time-off instances that count against the time-off limit according to their actual status are considered. Also, if an earlier **Preferred** request is not valid for time-off within the various limits, it is ignored.

You can configure the advance threshold for automated time-off wait-listing. You can also configure the minimum number of weeks in advance that a request can be made for each time-off rule; that minimum number is called the automatic approval threshold. If an ungranted time-off request in the wait-list violates the automatic approval threshold, then WFM removes the request from the wait-list. That time-off request remains in the status **Preferred**, but it cannot remain wait-listed.

See Enabling automatic approval and setting the threshold below.

Events that might change the system's ability to grant time off, such as the agent's contract availability status, can affect the validity of any time-off request. Thus, wait-listing takes place on a schedule that is specified by a timeout option.

Enabling wait-listing

The following sections provide information about enabling wait-listing, and describes how auto-approvals, thresholds, and auto-publishing affect wait-listing.

Automatic approval of time-off requests

Wait-list automation is related to automatic approval functionality. The common workflow of wait-list automation is:

1. An agent's time-off request is automatically approved, but there are no time-off slots within the limits of the request.
2. The request is wait-listed until the appropriate time-off slots appear, and then automatically approved, if possible.
3. If automatic approval is enabled but the time-off request is beyond the automatic approval threshold, then the request cannot be wait-listed. It is instead saved with the status **Preferred**.

Important

Automatic approval must be enabled for wait-listing to work. When automatic approval is not enabled, supervisors manually grant time-off requests and requests are not wait-listed, even if requested by the agent.

When do time-off slots become available?

Time-off slots become available when:

- A supervisor declines a time-off request
- An agent recalls a time-off request
- An agent or supervisor deletes a time-off request.

Time-off slots are taken (or unavailable) when a Granted or Preferred or Scheduled time-off request is entered.

Viewing available time-off slots

Now agents can see if the time off that they want is available before they request it. In the **Time Off** view, they can hover the cursor over any time slot to see time-off limits and wait-list data about the time slot in a popup.

Enabling automatic approval and setting the threshold

Automatic Approval must be enabled for wait-listing to work. To learn more, see [[PEC-WFM/Current/Supervisor/RlsFrRqts]] in the *Workforce Management Web for Supervisors (Classic) Help*.

To enable and configure automatic approval, see the options:

- **Automatically approve time-off request if: Request is made by the following number of weeks in advance number**
- **Minimum requested time off is number** > (hours and minutes).

Auto-publishing

When WFM automatically approves a time-off request, it can also insert it into the Master Schedule automatically, if auto-publishing is enabled.

Wait-listing

Wait-listing is a background function that is enabled by circumstances and configuration. The circumstances are: automatic approval must be enabled and an agent's time-off request must be valid (time off slots and agent credit must be available).

When are time-off requests wait-listed?

- When the time-off request is valid (for example, not for time in the past).
- When the time-off request is not for more time than the agent's time-off balance contains.
- When the automatic approval option is enabled.

WFM will only wait-list those time-off requests that would have been automatically approved, if not for time-off limits. Also:

- If automatic approval is not set up in the accrual rule or the threshold has been passed, then that particular time-off item cannot be wait-listed.
- The requesting agent should have sufficient time-off balance and there can be no other restrictions.
- If limits allow, the request will be granted and not wait-listed

Treatment of preferred time-off requests

Preferred time-off requests (having the status Preferred) are not considered during schedule building. When a master schedule is published, Preferred time-offs do not count against limits and agent balance anymore, because they are usually not scheduled.

You can configure WFM to override this functionality by making unscheduled time off count against the agent balance and time-off limits, by using the **CalendarOverScheduleData** option.

Use cases and notes

The following use cases discuss scenarios to compare availability and seniority, and provide some additional important rules to keep in mind.

When availability overrides seniority

1. Request A asks for time slots that are not available (8AM-6PM). The time 8-9AM is not available, and so Request A is wait-listed.
2. Request B comes in later, but asks for time slots that are available (10AM-6PM).

The Result:

Request B is granted and Request A remains wait-listed, even though Request B came in later.

When seniority overrides availability

1. Request A is wait-listed. The time slots for automatic approval of this request become available, but the wait-list timeout has not yet expired. So this request remains wait-listed.
2. Request B comes in later and asks for the same time slots as Request A.

The Result:

- If the time slots are available for both requests, Request B is honored immediately and Request A is honored after the wait-list timeout expires.
- If the time slots are available for only one request, Request B is wait-listed and after the wait-list timeout expires, Request A is granted first.

Rules to remember

- When the wait-list process can grant a request, it changes the saved status of that request to granted (and removes the internal wait-list flag).
- If the auto-publish and wait-list functions are set up together, then granted requests are published to the master schedule.
- A wait-listed request can be granted only if: automatic approval is enabled, the time-off request is valid, there are no other restrictions.

WFM removes from the wait-list any time-off request that has expired (the time steps that it specifies are in the past) or belongs to an agent with no time-off balance.