Workforce Management Web for Supervisors (Classic) Help

Notifications

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Create and manage notifications that alert users of schedule and time-off changes.

Related documentation:
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In the **Configuration** module, select **Notifications** to create, edit, delete, and copy emails by site for the four types of notifications listed below. The notification types that you create are listed in the Notifications pane, along with its corresponding subject. You can create the same notification types for many different sites and business units, depending on your requirements.

- Schedule Modifications
- Schedule Trade Status Changes
- Time-Off Bidding
- Time-Off Requests Status Changes

Security permissions

You must have certain security permissions assigned in WFM Web to configure notifications. See User Security in the *Workforce Management Administrator's Guide* for a description of WFM security roles and associated privileges, and Creating roles in this Help.

Managing notifications

Tip
WFM sends out notifications to agents and supervisors, but it does not generate notifications by default. To generate notifications you must first create them, then select at least one site in the Associated Sites tab, to which the notifications will be sent and then save. Once you have done so, WFM sends out notifications of the selected types. For more information on this server component, see *Workforce Management Administrator's Guide*.

After creating notifications, you might need to edit, delete, or copy them from time to time, or you might want to add or remove certain associated sites. The following procedures describe how to

perform these tasks.

Creating notifications

To create notifications of schedule modifications:

1. In the Configuration module, select **Notifications**.

2. In the Objects tree, select a business unit.

3. In the Notifications pane, click **New**.
   The Properties tab opens by default.

4. From the Type drop-down list, select one of four notification types:

   - **Schedule Modifications**

   - **Schedule Trade Status Changes**

   - **Time-Off Bidding**

   - **Time-Off Request Status Changes**

5. At this step, choose one of two options:

   - Use the prepopulated text in the **Subject** and **Message** fields, adding any additional token variables, as required.

   - Enter new text in the **Subject** and **Messages** fields, adding token variables, as required.

6. Click **Save**.

You can now associate sites with this notification.

Editing notifications

When editing notifications, you cannot change the notification type.

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 **Save** on the toolbar.
   If you switch to another notification type without saving, a message asks if you wish to save or cancel.

Deleting notifications

To delete a notification:

1. In the Notifications pane, choose the notification you want to delete.

2. Click **Delete**.

3. In the Confirmation dialog, click **Yes** to delete the notification or **No** to cancel the action.

Copying notifications

To copy an existing notification to a different business unit:

1. In the Notifications pane, choose the notification you want to copy.

2. Click **Copy**.

3. When the Copy Notification pane opens, select a business unit and then, click **Apply**.
   The notification is now copied and associated with the business unit you selected.

Properties and associated sites

When you create email notifications, the **Properties** and **Associated Sites** panes become available for you to select the notification type, compose the subject and body of the message, and select the sites you want to associate with them. In the **Properties** pane, there is some prepopulated text in the subject and message body, if you wish to use it.

Notification properties

After selecting a notification type from the drop-down list, you will find that each of the four notifications types has the same sections in the **Properties** tab. However, the information withing these sections vary slightly, depending on which notification type you selected.

Tokens

This section contains buttons for inserting tokens into the message body:

- **Notification of Schedule Modifications**—Available tokens related to agent time-off requests are: *Agent*, *Requested Dates*.

- **Notification of Schedule Trade Status Changes**— Available tokens related to agent schedule trades are: *Proposing Agent*, *Responding Agent*, *Requested Dates*, *Requested Status*, *Submission Date*, *Expiration Date*.

- **Notification of Time-Off Bidding Changes**—Available tokens related to time-off bidding requests are: *Agent*, *Bidding Status*, *Status Expiration*, *Bidding Period*, *Bidding Period Start*, *Bidding Period End*, *Team*, *Site*.

- **Notification of Time-Off Request Status Changes**—Available tokens related to agent time-off requests are: *Agent*, *Requested Dates*, *Requested Status*, *Employee ID*, *Team*, *Site*, *Submit Date*, *Actual Status*.

Subject

This section contains Genesys-supplied subject text, which you can modify by changing text or inserting tokens:

- **Notification of Schedule Modifications**—The supplied text is "*Message from Genesys Workforce*

Management: Schedule modification occurred."

- **Notification of Schedule Trade Status Changes**—The supplied text is "*Message from Genesys Workforce Management: Schedule trading status changed.*"
- **Notification of Time-Off Bidding Changes**—The supplied text is "*Message from Genesys Workforce Management: Time-Off Bidding status changed to for .*"
- **Notification of Time-Off Request Status Changes**—The supplied text is "*Message from Genesys Workforce Management: Time-Off Request status changed to .*"

Message Body

This area also contains Genesys-supplied body text, which you can modify by deleting/typing over text and inserting tokens:

- **Notification of Schedule Modifications**—The supplied text is "*The schedule for has been modified for the date(s) .*"
- **Notification of Schedule Trade Status Changes**—The supplied text is "*The schedule trade proposal for and for the date(s) has been updated with the status of . Trade proposal's submission date is . It will expire on .*"
- **Notification of Time-Off Bidding Changes**—The supplied text is "*Status for agent changed to . It is applicable to time-off bidding period with start and end .*"
- **Notification of Time-Off Request Status Changes**— The supplied text is "*has requested time off for the date(s) . The requested time off is currently in status.*"

Associated sites

Use this tab to select one or more sites to associate with a notification.

To associate a notification with a site:

- Expand a business unit to display its sites and make your initial selection(s) or change them at any time.

Rules for sending notifications

Learn about the rules that govern when and to whom WFM sends emails for each notification type. After notifications are saved, WFM uses the specified subject, body, and rules listed below when sending them to agents and supervisors.

Schedule modifications

When a supervisor changes one or more scheduled days, WFM sends a schedule modification notification to the affected agent in the configured site and to supervisors who have the appropriate security rights.

Schedule trade status changes

WFM applies the following rules when sending notifications of trade status changes. 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**.
- Supervisors who have appropriate security rights are notified when a trade status is **Pending**, or changes from **Pending** to any other status.
- The responding agent is notified when the status of a trade proposal is **In Review** or **Open**.
- The proposing agent is 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 check box 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.

Time-off bidding

WFM applies the following rules when sending notifications of time-off bidding changes:

- When an agent's status in bidding period is changed to **Waiting** or **Timed Out**, WFM sends a time-off bidding notification to the affected agent.

Time-off request status changes

WFM applies the following rules when sending notifications of time-off request status changes:

- When supervisors manually change agents' time off in the **Calendar** module, affected agents and other supervisors who have the appropriate security rights receive a notification.

- When agents request time off that are not **Auto-declined**, supervisors who have the appropriate security rights are notified.

- When automatic **Time-Off** request status changes occur, the affected agents and supervisors who have the appropriate security rights and are notified.

- When time-off balances change, supervisors who have the appropriate security rights are notified.

For a complete description of the WFM security roles and privileges, see Roles in this Help.