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Workforce Management Web for Supervisors (Classic) Help

Business Units

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- Supervisor

Use these controls to create business units (BU) that consists of a set of sites that may be grouped together because the agents at the sites perform the same activity, or for ease of management.

Related documentation:

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Go to **Configuration > Organization > Business Units** to view this panes described in this article.

For monitoring purposes, you can group activity results from the various locations as a single business unit, allowing contact center managers to evaluate activity performance across locations. For display and staffing purposes, Workforce Manager splits the activity load among the sites that compose the business unit.

Use these panes to:

- Create a new business unit or edit an existing one.
- Delete a business unit.
- Copy a business unit.
- Use the Sites pane to link sites to a business unit.

Business unit pane controls

-  **Search field**—Enter the search criteria. For example, the name of the business unit.
-  **New**—Click to create a new business unit.
-  **Delete**—Click to delete the selected business unit.
-  **Copy**—Click to copy the selected business unit to create a new one.
-  **Help**—Click to view a Help topic for the **Business Unit** pane.

Properties pane controls

When you create a business unit, the **Properties** pane is open for any selected business unit. It is the default selection in this pane. (The other selection is Sites.)

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-  **Save Now**—Click to save the properties after you have entered them or made changes.
 -  **Help**—Click to view a Help topic for the **Properties** pane.
 - **Name field**—Enter a name for the business unit.
 - **Time Zone drop-down list**—Click to select a time zone for this business unit.

Creating business units

To create a business unit:

1. In the **Configuration > Organization** module, select **Business Unit**.
2. In the **Business Unit** pane, select **New**  .
By default the **Properties** pane for this business unit is open.
3. In the **Name** field, enter a name for the business unit.

Important

New Business Units are created with the default name, **New Business Unit (number>)**. The BU name must be unique. Therefore, Genesys recommends that you change it to a unique name, otherwise an error message appears prompting you to edit the name.

4. In the **Time Zone** drop-down list, select a time zone for the new business unit.
5. Click **Save Now**  .
A new business unit appears.

For help with configuration of your new business unit, see Business unit properties.

Copying business units

To create a business unit by copying an existing one:

1. In the **Business Unit** pane, select a business unit.
2. Click **Copy**  .
The new business unit appears in the Business Units list with the same time zone as the business unit you copied.
3. Do the rest of the configuration as described in Business unit properties and Business unit sites.
4. Click **Save Now**  .

Business unit properties

When you click an existing business unit (BU) name in the **Business Units** pane, the **Business Unit Properties** pane opens by default.

Use this pane to edit the business unit:

- **Business Unit Name**—Enter a name that is unique in the WFM environment.
- **Time zone**—This shows the default time zone. To change it, select a different time zone from the drop-down box.
- **Week Start Day**—Use this drop-down menu to set the first day of the week for all Sites under the Business Unit, including the week start day when creating schedules. You can choose from any day of the week.

The week start day is important for proper scheduling and schedule-related weekly totals. WFM Web differentiates between how it displays and uses the week start day. Within the interface, where the week start day is not vital for proper data presentation, WFM uses the browser locale settings. Where the week start day is used for presentation or validation purposes, WFM uses the setting specified in the BU.

Additional options

In the right-side pane, select Sites for additional business unit configuration options.

Business unit sites

The **Business Units Sites** tab enables you to select the sites you want to be included in the business unit. To open it, select a BU and in the right-side pane, click **Sites**.

Sites pane controls

-  **Save Now**—Click to save the properties after you have entered them or made changes.
-  **Add Site to Business Unit**—Click to add a site to a business unit. When clicked, opens a list of available sites from which to choose.
-  **Help**—Click to open a Help topic for the **Sites** pane.

Available Sites pane controls

-  **Apply**—Click to apply this site to the selected business unit.

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-  **Close**—Click to close the **Available Sites** pane.
 -  **Help**—Click to open a Help topic for the **Available Sites** pane.

Adding sites to business units

To add a site to your business unit:

1. Select a business unit.
2. In the **Sites** pane, select **Add Sites to Business Unit** . The **Available Sites** pane opens.
3. Select a site and click **Apply** .
The site appears in the Sites pane and is assigned to the selected business unit.

If you select a site that cannot be applied for any reason, the **Review Validation Messages** pane opens with an error description.

Sorting sites in lists

To sort the sites in a list, click the header of the column by which you want to sort the sites.

Business unit skills

Using the **Business Units > Skills** pane, you can select the skills you want to include in the business units (BU). To open this pane, select a BU and in the right-side pane, click **Skills**.

Skills are imported into WFM automatically during synchronization, but they are first defined and assigned to agents in Genesys Administrator. In WFM, skills are assigned to business units (not sites). A skill is assigned to one business unit only and can be assigned only to activities and profiles under this business unit.

Read more about skills in the *Workforce Management Administrator's Guide*.

Skills pane controls

-  **Save Now**—Click to save the properties after you have entered them or made changes.
-  **Add Skills to Business Unit**—Click to add a skill to a business unit. When clicked, opens a list of available skills from which to choose.
-  **Remove Skills from Business Unit**—Click to remove a skill from a business unit.
-  **Help**—Click to open a Help topic for the **Skills** pane.

Available Skills pane controls

-  **Apply**—Click to apply this skill to the selected business unit.
-  **Close**—Click to close the **Available Skills** pane.
-  **Help**—Click to open a Help topic for the **Available Skills** pane.

Adding skills to business units

To add a skill to your business unit:

1. Select a business unit.
2. In the **Skills** pane, select **Add Skills to Business Unit**  .
The Available Skills pane opens. The Available Skills pane contains unassigned skills only. To assign this same skill to another BU, you must first unassign it from this BU.
3. Select a skill and click **Apply**  .
The skill appears in the Skills pane and is assigned to the selected business unit. If you select a skill that cannot be applied, the Review Validation Messages pane opens with an error description.
4. Click **Save Now**  .

Removing skills from business units

To remove a skill from a business unit:

1. In the **Skills** pane, select the skill you want to remove.
2. Click **Remove Skills from Business Unit**  .
3. When the **Confirmation** dialog opens, select **Yes** to proceed or **No** to cancel the action.
4. Click **Save Now**  .

Sorting and searching the Skills list

To sort the skills in a list:

- Click the header of the column by which you want to sort the skills.

To search for skills in a list:

- Type the skill name in the **Search** field and press **Enter**.

Business unit configuration

You must have the Access backend configuration security right to view the **Business Units > Configuration** pane.

Use the **Configuration** pane and the parameters described below to configure the Data Aggregator (DA) setup for the Business Unit.

- **Data Aggregator**—Select the Data Aggregator instance for this business unit. If the application selected is not validated by Genesys Configuration Server or if no application is selected, WFM uses the default value .
 -  **Restart Data Aggregator icon**—Click to restart DA. (WFM Web prompts you to save any outstanding changes before restarting.)
- **Stat Server**—A read only field, containing the name of Stat Server Application that is specified in the selected Data Aggregator Application's connection properties. If there is no selected DA, or if DA Application or the Stat Server ID is invalid, this field is empty.
- **Tenant**—Enter the name of the tenant. The default value is **Environment**.
- **Tenant Password**—Enter the tenant password that was set in Genesys Administrator. If not set in Genesys Administrator, the password is blank. This value does not display in plain text.
- **Time Profile**—From the drop-down list, select a time profile. This list is populated with data from Stat Server Application's **Options\TimeProfiles** section. The default value is .