

GENESYS

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Workforce Management Web for Supervisors (Classic) Help

Sites

Contents

- 1 Site properties
- 2 Managing sites
 - 2.1 Creating sites
 - 2.2 Copying sites
 - 2.3 Editing sites
 - 2.4 Deleting sites
- 3 Associating teams with sites
 - 3.1 Teams controls
 - 3.2 Team Properties controls
 - 3.3 Adding and removing agents from teams
- 4 Associating agents with sites
 - 4.1 Agents controls
 - 4.2 Available Agents controls
 - 4.3 Adding and removing agents from a site
- 5 Site configuration



Supervisor

This page provides links to topics that explain how to create and manage sites.

Related documentation:

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Sites can be equivalent to switches, which are defined in Genesys Configuration Manager and imported into WFM.

You can create sites in WFM that are unrelated to a switch. This is appropriate when switches do not correlate with your company's organization. For example, a single location could be divided into multiple entities to reflect divisions along business unit lines.

Go to **Configuration > Organization** and select **Sites** to complete the following tasks:

- · Create new sites
- Edit sites
- · Delete sites
- · Associate agents with sites
- · Distribute agents between teams

Site properties

When you create a site or select an existing one, the properties for that site are displayed in the **Site Properties** pane. At the top of this pane, you can view additional configuration settings for the site, by selecting Teams or Agents.

The fields in the **Properties** pane are:

- Name—Enter a name for a new site or edit the existing one. The name must be unique in the WFM
 environment.
- **Associated Switch**—A read-only field that shows the switch associated with the site as configured in Genesys Administrator.
- Maximum Number of Seats—The maximum number of seats in the center. This places a limit on the number of agents that Workforce Manager can schedule at any given time. Some combinations of activity sets and task sequences might conflict with this constraint. In cases of conflict, Scheduler gives priority to the activity set.
- Time Zone—The default time zone. To change it, select the desired time zone from the drop-down list.

- Business Unit—The business unit, with which the site is associated.
- Alarm Threshold—The number of minutes before or after a schedule state group is scheduled to occur before an agent is considered severely non-adherent. Can be set to any integer between 0-1440 (24 hours). The default value is 5 minutes.
- Allow auto-approval of schedule trades—Check this box to enable auto-approval of this trade type. Clear it to require manual approval of all agent schedule trades.
- Allow Agents to create Shared Transport—Check this box to enable agents on this site to create and modify shared transport groups.
- Paid Breaks are mandatory—Check this box to make paid breaks mandatory during scheduling. By default, the check box is cleared. (See Tip below.)
- Suppress Break-related warnings while scheduling—Check this box to suppress break-related warnings during scheduling. By default, the check box is cleared. (See Tip below.)

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There's more information about mandatory paid breaks, suppressing break-related warnings, and scheduling breaks and meals in conjunction with exceptions in the Workforce Management Administrator's Guide.

The following check boxes exist while you are creating a new site. After the site is saved these check boxes are no longer visible:

- Generate default Schedule State Groups and Exception Types—Check this box to enable WFM to create default schedule state groups and exception types.
- Associate existing exceptions with site—Check this box to enable WFM to verify that none of the newly created exception types for the site's BU have the same name as an existing exception type. If there is duplication, WFM adds a new site to its associated sites. If no duplication exists, a new exception type is created.

Managing sites

Manage the sites in your enterprise by using the following controls to create, edit, and delete sites in this pane:

- **Search** *field*—Enter the search criteria. For example, the name of a site. Error
- creatNew-Click to add a new site.
- Friumbnail: creating ete—Click to delete an existing site.
- Humbhail: Light to delete an existing site Light by Click to copy the selected site. Humbhail: Light by Click to open a Help topic for the -Click to open a Help topic for the **Sites** pane. ea**dile∃r**⊢ Umbnai|:
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Creating sites

To create a site:

- 1. In the Configuration module, select Organization > Sites.
- 2. In the **Sites** pane, click **New**Error

- 3. On the **Properties** pane, in the lange field, enter a name for the site. The name must be unique in the Majenvironment.
- 4. In the **Maximum Number of Seats** field, enter the maximum number of seats in this site.
- 5. From the $\bf Time\ Zone\ drop\mbox{-}do\mbox{\it NP}\mbox{\it MN}\mbox{\it Ast},$ select a time zone for the site. thumbnail
- 6. From the **Business Units** drop-down list, select the business unit, with which you want to associate this site. destination
- 7. In the **Alarm Threshold** field, enter a value for the alarm. See Alarm Threshold, for information about this parameter.
- 8. Check the Allow auto-approval of schedule trades if you want the agents in this site to have automatic approval for any schedule trade requests. If not, leave the check box empty.
- 9. Check the Allow Agents to Create Shared Transport if you want the agents in this site to be able to make shared transport requests. If not, leave the check box empty.
- 10. Check the Generate default Schedule State Groups and Exception Types if you want WFM to create default schedule state groups and exception types. If not, leave the check box empty.
- 11. Check the Associate existing exceptions with site if you want WFM to verify that none of the newly created exception types for the site's BU have the same name as an existing exception type. If not, leave the check box empty.
- 12. Click Save Now

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For help with configuration of your new site, see Site properties.

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Copying sites

To create a new site thumbnally an existing one:

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1. In the **Sites** pane, select a site and click **Copy**Error

2. In the **Properties** pane, rename the new site and site and supplied the properties, if required.

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Although some of the configuration settings transfer the original to the copy, you must do the rest of the configuration as described in Site properties and Associating agents with sites.

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Editing sites

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To configure a site or edit its configuration:

- 1. In the **Sites** pane, select it.
- 2. Enter the appropriate settings as described in Site properties. Settings on the Agents pane are described in Associating agents with sites.

Deleting sites

To delete a site:

- 1. In the **Sites** pane, select the site you want to delete.
- 2. Select **Delete**

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3. When the Confirmation dialog opens, click Yes to continue or No to retain the selected site and its properties. thumbnail:

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Associating the with sites

Associate teams with an existing site or with a newly created site to facilitate work activities, by selecting **Teams** at the top of the **Properties** pane.

Teams controls

The **Teams** pane has the following controls:

- **Save Now**—Click to save the configuration in the **Teams** pane. Error
- creatGreate Team—Click to create a new team within the site.
- Friding phail: creating letter than the selected team from the site.
- Humbrail: The Teams pane.

The shape of the **Team** list, by clicking the **Team Name** column header.

When you create a new team, the **Team Properties** pane opens. Agents who are associated with the selection appear in the **Team Properties** pane.

When you click **Add Agent to Team** (____), agents appear in the **Available** Agents and can be filtered by Last Name, First Name, or Employee ID. By default, all agents to which you have 9000 appear in this pane. You can edit the team name, add or remove agentsthemelteam, and remove agents from Unable the site

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Team Properties controls

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The **Team Properties** pane has the following controls:

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- **Save Now**—Click to save the configuration in the **Team Properties** pane.
- creat Glose—Click to close the Team Properties pane.
- Thumbnail: creating p—Click to open a Help topic for the **Team Properties** pane. fumbnail: fumbnail: fambgeld—Enter a name for the team.
- Trumbnail. Trum**fuld Agent to Team**—Click to add agents to the team.

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- **Remove Agent from Team**—Click to remove agents from the team.
- creat Remove Agent from Site—Click to remove agents from the site. Eff@mbnail:

When add agents to a team, the **Available Agents** pane opens. See the Available Agents controls from certain business unit(s) or the entire enterprise, and to include unassigned agents in the enterprise or business unit. See Agent Filter. thumbnail

To soft agents in the **Available Agents** pane, click any one of the column headers.

Adding and removing agents from teams

To add an agent to a team:

1. In the Teams pane, click Add Agents to Team Error The Available Agents pane opens. creating

2. Select an agent from the list and click Apply thumbnail:

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3. After you have finished assigning agents, click/Classeail: in the Available Agents pane.

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1. In the **Teams** pane, select the agent you want to remede. (Use CNTRL or SHIFT to select several agents to at a time.) destinat ΘY^e

2. Click Remove Agent from Team

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When you move an agent from one wite to another site, the agent's historical schedules are still available to betwienwach and reported. However, any Calendar items related to that agent will not be awailable when building future schedules for the new site. This is because items, such alequimetion Types, Exception Types, Contracts, and Shifts, are configured separately for each site.

Associating agents with sites

Associate agents with an existing site or with a newly created site to facilitate management, by selecting **Agents** at the top of the **Properties** pane.

Agents controls

Warning

The **Agents** pane has the following controls:

- **Save Now**—Click to save the configuration in the **Agents** pane. Error
- Search By radio buttons—Select one of three radio button to find an agent in the list: Last Name, thumbnail: Unable

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First Name, Employee ID.

- **Search** *field*—Enter the search criteria. For example, the agents first name.
- Add Agent to Site—Click to add agents to the site.

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- creat Remove Agent from Site—Click to remove agents from the site.
- from bnail: creating p—Click to open a Help topic for the **Agents** pane.

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Age are associated with that site appear in the **Available Agents** pane and can be filtered. By definition agents to which you have access appear in this pane.

Available Agents controls

The Available Agents pane has the following controls:

- Apply—Click to assign an agent to a site. Error
- creat@lose—Click to close the Available Agents pane.
- Fill monail: creating p—Click to open a Help topic for the **Available Agents** pane.
- Humbhail: Select one of three radio buttons to find an agent in the list: Last Name, thus haile.

 Humbhail: Select one of three radio buttons to find an agent in the list: Last Name, thus haile.
 - Flimbnail Fe Sea Estarbación **Search** *field*—Enter the search criteria. For example, the agents first name.
- **Fritterg**-Click to filter the list of available agents, by opening the **Agent Filter** pane.
- Fixer the hist to display only agents from certain business unit(s) or the entire enterprise, କ୍ରିନ୍ୟ ବ୍ୟାଦ୍ଧାନ୍ୟ। See the figure below.

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Sorting indicates in lists

To sort agents in either the **Agents** or **Available Agents** pane, click the header of the column in which you want to sort the agents.

Adding and removing agents from a site

To add an agent to a site:

1. In the Agents pane, click Add Agent to Site

Error The Available Agents pane opens. creating

- 2. Select an agent from the list and click Apply thun(beaithe CTRL or SHIFT keys to select several agents

To remove an agent from a site:

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1. In the **Agents** pane, select the agent you want to rental ve. (Use the CTRL or SHIFT keys to select several

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agents at a time.)

2. Click Remove Agent from Site

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When you move an agent from gazesite to another site, the agent's historical schedules are still available to behind and reported. However, any Calendar items related to that agent will not be to vailable when building future schedules for the new site. This is because items, such as that wolf Types, Exception Types, Contracts, and Shifts, are configured separately for each site.

Site configuration

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

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

- **Data Aggregator**—Select the Data Aggregator instance for this site. 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 Estanding changes before restarting.) creating
- Stath Server Application that is specified in the selected Data Aggregator Application's connection properties. If there is no selected DA, or if the DA Application or Stat Server ID is invalid, this field is empty.

 Save
- **Tenant** 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 .
- Switch Used for Statistics—Select the switch that will be used for handling statistics. The default value is .
- Associated Switch—Select the switch that is associated with the site that will be used to synchronize Genesys configuration objects.
 - Unassign Agents in case Genesys login is deleted check box—Enter a check mark in this box if you want WFM to automatically unassign from this site, any agent whose login is deleted from this site.
 - Assign agents if logins are for this Site only check box—Enter a check mark in this box if you want WFM to automatically assign to this site, any agent whose login is only valid for this site.
- **Dedicated WFM Server**—Select the WFM Server instance that will be used for forecasting, scheduling, trading, and performance and adherence measurements. Some additional configuration might be required to assign the dedicated WFM Server. Ask your Genesys Professional Services representative to

assist you with this.