# Workforce Management Web for Supervisors (Classic) Help

Sites

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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.)

> ### Tip
>
> 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.

- **New**—Click to add a new site.

- **Delete**—Click to delete an existing site.

- **Copy**—Click to copy the selected site.

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

## Creating sites

To create a site:

1. In the **Configuration** module, select **Organization > Sites**.

2. In the **Sites** pane, click **New**  .

3. On the **Properties** pane, in the **Name** field, enter a name for the site.
   The name must be unique in the WFM environment.

4. In the **Maximum Number of Seats** field, enter the maximum number of seats in this site.

5. From the **Time Zone** drop-down list, select a time zone for the site.

6. From the **Business Units** drop-down list, select the business unit, with which you want to associate this site.

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**  .

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

## Copying sites

To create a new site by copying an existing one:

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

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

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

## Editing sites

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** ![icon] .
3. When the **Confirmation** dialog opens, click **Yes** to continue or **No** to retain the selected site and its properties.

# Associating teams 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:

- ![icon] **Save Now**—Click to save the configuration in the **Teams** pane.

- ![icon] **Create Team**—Click to create a new team within the site.

- ![icon] **Delete Team**—Click to delete the selected team from the site.

- ![icon] **Help**—Click to open a Help topic for the **Teams** pane.

You can sort 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 selected team appear in the **Team Properties** pane.

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

remove agents from the site

## Team Properties controls

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

-  **Save Now**—Click to save the configuration in the **Team Properties** pane.

-  **Close**—Click to close the **Team Properties** pane.

-  **Help**—Click to open a Help topic for the **Team Properties** pane.

- **Name** *field*—Enter a name for the team.

-  **Add Agent to Team**—Click to add agents to the team.

-  **Remove Agent from Team**—Click to remove agents from the team.

-  **Remove Agent from Site**—Click to remove agents from the site.

When you add agents to a team, the **Available Agents** pane opens. See the Available Agents controls. You can filter this list to display only agents from certain business unit(s) or the entire enterprise, and to include unassigned agents in the enterprise or business unit. See Agent Filter.

To sort 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**  .
   **The Available Agents pane opens.**

2. Select an agent from the list and click **Apply**  .
   **Use CRTL or SHIFT to select several agents at a time.**

3. After you have finished assigning agents, click **Close**  in the **Available Agents** pane.

To remove an agent from a team:

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

2. Click **Remove Agent from Team**  .

> ### Warning
>
> When you move an agent from one site to another site, the agent's historical schedules are still available to be viewed and reported. However, any Calendar items related to that agent will not be available when building future schedules for the new site. This is because items, such as Time-Off 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

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

-  **Save Now**—Click to save the configuration in the **Agents** pane.
- **Search By** *radio buttons*—Select one of three radio button to find an agent in the list: **Last Name**, **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.
-  **Remove Agent from Site**—Click to remove agents from the site.
-  **Help**—Click to open a Help topic for the **Agents** pane.

Agents who are associated with that site appear in the **Available Agents** pane and can be filtered. By default, all agents to which you have access appear in this pane.
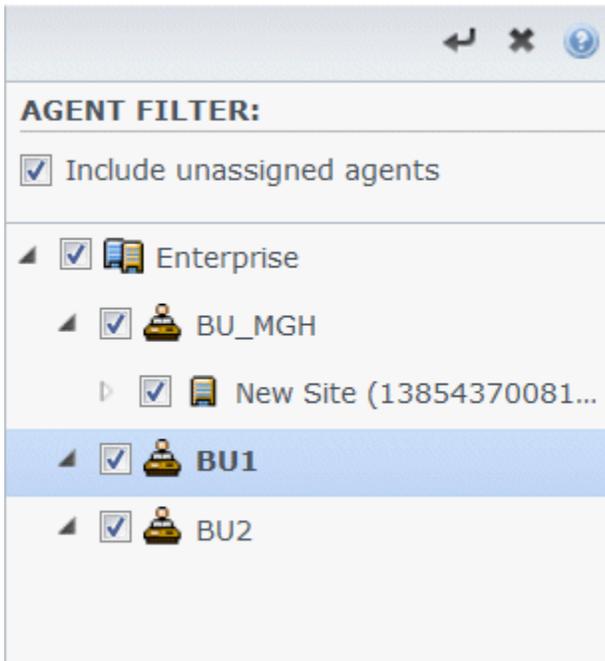
### Available Agents controls

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

-  **Apply**—Click to assign an agent to a site.
-  **Close**—Click to close the **Available Agents** pane.
-  **Help**—Click to open a Help topic for the **Available Agents** pane.
- **Search By** *radio buttons*—Select one of three radio buttons to find an agent in the list: **Last Name**,

**First Name**, **Employee ID**.

- $\quad$ **Search** *field*—Enter the search criteria. For example, the agents first name.

- $\quad$ **Filter**—Click to filter the list of available agents, by opening the **Agent Filter** pane.
**Filter this list to display only agents from certain business unit(s) or the entire enterprise, and to include unassigned agents in the enterprise or business unit. See the figure below.**



**Figure:** Agents Pane—Filtering

Sorting agents 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** .
   **The Available Agents pane opens.**

2. Select an agent from the list and click **Apply** . (Use the CTRL or SHIFT keys to select several agents at a time.)

3. After you have finished assigning agents, click **Close** in the **Available Agents** pane.

To remove an agent from a site:

1. In the **Agents** pane, select the agent you want to remove. (Use the CTRL or SHIFT keys to select several agents at a time.)

2. Click **Remove Agent from Site**  .

> ## Warning
>
> When you move an agent from one site to another site, the agent's historical schedules are still available to be viewed and reported. However, any Calendar items related to that agent will not be available when building future schedules for the new site. This is because items, such as Time-Off 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 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 the DA Application or 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 .

- **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.