GENESYS

Workforce Management Web for Supervisors (Classic) Help

Policies

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  - Supervisor

Use Policy objects to configure the rules that govern the work schedules of contact-center agents. WFM considers these rules (defined as policies for each site) when making forecasts and setting up schedules.

Related documentation:
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> ### Important
> To configure objects and change settings in the **Policies** module, you must have the appropriate role privileges. See Role Privileges.

WFM Web for Supervisors includes the following policy objects:

- Exception types—Defined periods of time when agents are engaged in non contact work or are absent, such as during meetings or on days off.

- Time off types—Various types of time off, such as vacation, sick leave, and holiday. This module enables you to configure various time-off types and associate them with time-off rules.

- Time-off rules—The rules that govern accrued time off, and how awarded time off is granted. This module enables you to configure time-off rules for multiple time-off types or a single time-off type.

- Meetings—A period set aside for a specific activity, such as a meeting or training, attended by multiple agents.

- Marked times—Periods that you can designate as requiring special tracking. For example, you might have an agent who works extra hours on a particular day, but the extra hours do not count as overtime. You can mark those hours to track and report on them.

- Shifts—Defined periods of time when agents are assigned to work activities. Shifts define workday parameters by the time of day, duration, and days of the week.

- Contracts—Settings for agent availability times and days off that might be union or contractual requirements. WFM automatically takes these settings into consideration during scheduling to produce legal schedules for every agent.

- Rotating patterns—Rotating workweeks of shifts, working days, working hours, and/or work activities. A rotating pattern can be assigned to an agent.

Watch the video

- Creating Exception Types
- Creating Time-Off Types
- Creating Time-Off Rules
- Creating Meetings
- Filtering Agents by Activities
- Creating Marked Time