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Workforce Management Web for Supervisors (Classic) Help

[Schedule State Groups](#)

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- Supervisor

Learn about Schedule State Groups, schedule states, and Genesys states.

Related documentation:

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A *Schedule State Group* is a collection of schedule states that is linked to a site.

If you selected Generate Default Schedule State Groups and Exception Types when you imported the site, these Schedule State Groups appear automatically:

- Asynchronous Work
- Days Off
- Exception Types
- Fixed-Staff Work
- Immediate Work
- No Activity
- Shift Items/Meals
- Time Off

The Schedule State Group view enables you to create a new group, copy and paste an existing group, edit, and delete groups. See [Configuring Schedule State Groups](#).

Important

To configure objects and change settings in the **Schedule State Groups** view, you must have the appropriate role privileges. See [Configuration Role Privileges](#).

For information about setting adherence rules for Schedule State Groups, see [Configuring adherence rules](#).

Schedule states

The schedule states that you can include in schedule state groups are:

- All breaks configured for the site

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- All meals configured for the site
 - All activities configured for the site
 - All exception types configured for the site
 - All time-off types configured for the site
 - Fixed states, which are:
 - Generic break, meal, exception, and activity states that you can use in place of specific meals, breaks, exceptions, and activities.
 - Day Off, Vacation, No Activity

Tip

Use these Fixed States to report the state, for which an agent is scheduled when a particular schedule state type (such as an Exception Type) has been deleted from WFM.

Schedule state groups and Genesys states

Each schedule state group is associated with one or more Genesys states, such as **CallRingling** or **WaitForNextCall**. Each group can include an additional reason (aux) code, sent with the related Genesys state, that further identifies what the agent is doing.

Important

Aux codes are not supported for all Genesys states. The T-Server you are using dictates which Genesys states support aux codes. Check the documentation for your T-Server to determine which of the Genesys states can support aux codes.

You can apply the Start Before Threshold and Start After Threshold values to each schedule state group; these values help you track agent adherence. Configure these functions in the **Adherence Rules** pane.

Configuring Schedule State Groups






Create and set properties for Schedule State Groups that define a collection of schedule states, and then associate these groups to a site.

To create a schedule state group, you must first select a site within a business unit. When you select a schedule state group or create a new one, the **Schedule State Group Properties** pane opens.

Controls and settings





Schedule State Groups controls

The **Schedule State Groups** pane contains the following controls:

-  **Search** *field*—Enter the search criteria. For example, the name of the schedule state group.
-  **New**—Click to create a new schedule state group.
-  **Delete**—Click to delete an existing schedule state group.
-  **Copy**—Click to copy and paste an existing schedule state group.
-  **Help**—Click to view a Help topic about the **Schedule State Group** pane.




State Groups Properties controls

The **State Groups Properties** pane contains the following controls:


-  **Save Now**—Click to save changes you have made in this pane.
-  **Help**—Click to view a Help topic about the **Schedule State Group Properties** pane.
- **Name** *field*—Enter a name for the Schedule State Group.
- **Type drop-down list**—Select a type for the Schedule State Group, such as **None** (default), **Planned Overhead**, **Unplanned Overhead**, **Actual Work**.
-  **Assign Schedule States**—Click to assign a schedule state to the group and open the **State Type** pane, from which you can select states from various state types (see controls below).
-  **Unassign Schedule States**—Click to remove or unassign a schedule state.

State Type controls

The **State Type** pane contains the following controls:





-  **Apply**—Click to apply the state to the schedule state group.
-  **Close**—Click to close the **State Type** pane.
-  **Help**—Click to view a Help topic about the **State Type** pane.
- **State Type drop-down list**—Select a state type for the Schedule State Group, such as **Fixed State**, **Activity**, **Exception Type**, **Break**, **Meal**, or **Time-Off Type**.
- ☐ **Show Assigned States** *check box*—Check this box to display the states that are already assigned.

When checked, the name of the schedule state group, to which this state is assigned displays in the **Schedule State Group** column.

-  **Search field**—Enter the search criteria. For example, if you selected **Exception Type** in the **State Type** drop-down list, enter an exception type name, such as **Exc1** or **Exc2**.

Creating Schedule State Groups



To create a group:

1. In the **Configuration > Schedule State Groups** pane, select a the site for which you want to create the schedule state group.
2. On the **Schedule State Groups** pane, select **New** .
The new schedule state group displays with a default name and the Schedule State Group Properties pane opens.
3. In the **Name** field, enter a name for your schedule state group. It must be unique within the site.
4. From the **Type** drop-down list, select a type (**None** (default), **Planned Overhead**, **Unplanned Overhead**, or **Actual Work**).
5. Assign schedule states to the group by clicking **Assign Schedule States** .
The State Type pane opens.
6. Optional: To remove any schedule state, select it and click **Unassign Schedule States** .
7. Select a **State Type** from the drop-down menu.
A list of states that are associated with this state type are displayed in the lower half of the pane.
8. Optional: To display any states already assigned to the schedule state group, click the **Show Assigned States** check box.
9. When you have finished adding schedule states, click **Apply** .
10. In the **Schedule State Group Properties** pane, from the drop-down list, select **Adherence Rules** to continue configuration of this schedule state group. See Configuring adherence rules.

Creating groups using copy and paste

To create a new schedule state group by copying and pasting an existing one:





1. In the **Schedule State Groups** pane, select a schedule state group.

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2. Select **Copy**  .
The Copy Schedule State Group schedule state group name> pane opens.
 3. Enter a name for the new schedule state group. It must be unique within the site.
If the name is not unique, the Review Validation Messages pane opens, with a description of the error message. In this case, A duplicate name specified..
 4. In the lower half of the pane, select the business unit and site, with which you want to associate this schedule state group.
 5. Click **Save Now**  .
The new schedule state group appears in the objects list according to the sort order selected (ascending or descending).

Editing Schedule State Groups

You can edit any schedule state group, whether it is pre-set or user-created.

To edit a schedule state group:

1. Select it **Schedule State Group** pane and make the changes in the **Schedule State Group Properties** and **Adherence Rules** panes.
2. Change the schedule state group name, if necessary. It must be unique within the site.
3. Change the state type, by selecting one of the four state types from the drop-down list.
4. Use the **Assign Schedule States**  or **Unassign Schedule States**  to change state assignment for this group.
5. When you have finished adjusting which schedule states are included, click **Apply**  .
6. Click **Save Now**  .
7. At the top of the **Schedule State Group Properties** pane, click **Adherence Rules** to continue configuration of this schedule state group. See Configuring adherence rules.


Tip

If you make changes to a Schedule State Group (assign or unassign a state, change an adherence rule), the Schedule State Group effective date automatically updates to the current date.

Deleting Schedule State Groups

To delete a selected schedule state group from the **Schedule State Groups** pane:

1. Select the schedule state group you want to delete.

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2. Click **Delete**  .
 3. When the **Confirmation** dialog appears, click **Yes**.
The schedule state group is deleted and any schedule states included in it now appear on the State Type pane.

Assigning states to multiple groups

You can assign the same schedule state(s) to different Schedule State Groups under the same Business Unit. For example, you can assign the state ExceptionType1 to SSG1 (under Site1 & under BU1) and to SSG2 (under Site2 & under BU1) at the same time—but only because both Schedule State Groups are under the same Business Unit (BU1).

Preset groups

Schedule state groups from a previous release of Workforce Management are brought into the WFM Web as pre-configured groups. The default groups, which can be edited or deleted are listed at the top of this article.

Tip

The formerly-used *Vacation Schedule State Group* no longer exists. Instead, Vacation is now a default time-off type within the Time Off Schedule State Group. All previously configured Vacation Schedule State Groups are migrated into the automatically-created Vacation time-off type.




Configuring adherence rules

Configure adherence rules for Schedule State Groups and multiple media channels within a site to define the standards WFM will use when monitoring agent performance.

To view the **Adherence Rules** pane, select **Adherence Rules** at the top of the **Schedule State Group Properties** pane.

Adherence Rules controls

The **Adherence Rules** pane contains the following controls:

-  **Save Now**—Click to save changes you have made in this pane.
-  **Associate Genesys current states with schedule states group**—Click to associate Genesys current states with schedule state groups.
-  **Delete State**—Click to delete an associated Genesys state.

-  **Help**—Click to view a Help topic about the **Adherence Rules** pane.

Adherence threshold levels

<p>Channel</p>	<p>Click to configure the media channel for the schedule state group. Select one of three radio buttons:</p> <ul style="list-style-type: none"> • None—Schedule state groups containing non-work activities that do not have a specified channel (and therefore, belong to all channels). • Voice/Unspecified—Schedule state groups using this channel contain voice-related activities and other work that is not related to any other configured channel, such as other non-media-channel activities. • Specify Name—Schedule state groups with this name will contain activities and other work being done on this channel. <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Important</p> <p>The channel name must match the name that is used in Stat Server statistics (and sent to WFM).</p> </div>
<p>Channel Name</p>	<p>Enter a name for the selected channel.</p>

Genesys current states mappings

- **Start Before Threshold** *field*—Enter a start time. This is the duration of time considered to be adherent time before the start of a schedule state. Valid values are 0–20. The default value is 20.
- **End After Threshold** *field*—Enter an end time. This is the duration of time considered to be adherent time after the end of a schedule state. Valid values are 0–20. The default value is 20.
- **Current State** *drop-down list*—Select a state from this list to set the current state to be mapped to the aux (reason) code.
- **Aux Code (Reason)** *field*—Enter an appropriate aux (reason) code. A reason is user-specified information that supplements schedule state information. A reason helps to define the precise nature of the schedule state group to which it is attached.

Tip

Reasons do not apply to all Genesys current states. Refer to your Genesys Stat Server documentation for additional information.

Start Before and End After thresholds

Set the Start Before Threshold and End After Threshold for an acceptable amount of flexibility in

scheduled state start and end times. Threshold settings indicate how many minutes early or late an agent can transfer to a scheduled state without being considered *nonadherent*.

Example 1: An agent is scheduled to start a shift at 12:00 PM and the Start Before threshold is set for 5 minutes. If the agent starts the shift at 11:54 AM, which is beyond the 5-minute threshold, it is written to the database and appears on the adherence reports as a nonadherent current state.

Example 2: If the schedule requires agents to work from 12:00–1:00 and both thresholds are set to 5 minutes, an agent who starts at 11:55 and ends at 1:04 is adherent. Agents who start and/or end outside the configured thresholds are either *nonadherent* or *severely nonadherent*.

You can configure the setting that marks the cut-off between nonadherence and severe nonadherence in the **Alarm Threshold** combo box on the **Site Properties** pane of the **Organization** module. See Site properties for details.

Setting the adherence rules



To set adherence rules for a schedule state group:

[Link to video](#)


1. In the **Schedule State Groups** pane, select a schedule state group.
2. At the top of the **Schedule State Group Properties** pane, select **Adherence Rules**.
The Adherence Rules pane opens.
3. In the **Start Before Threshold** and **End After Threshold** fields, set the adherence threshold levels for the schedule state group.
These rules define the agent adherence parameter. Agents are adherent if their start time and end time are within threshold intervals for that scheduled state.

Procedure continued...

1. Select the media channel for the Schedule State Group: **None**, **Voice/Unspecified**, or **Specify Name**.
If you choose Specify Name, enter the channel name—for example, email.
The channel name must match the name that is used in Stat Server statistics (and sent to WFM).

2. Click **Associate Genesys current states with schedule states group**  to populate the mappings list in the lower half of the pane.
 - Select the current states that should be associated with this schedule state group.
 - Continue adding rows as necessary.
 - To remove a Genesys current state from the **Current State** column, select it and then click **Delete** .

You can associate a Genesys current state with any number of schedule state groups.

3. Enter reasons (aux codes), if necessary, by typing the appropriate code into the **Reason Code** column for the appropriate Genesys current state.
4. Click **Save Now** .

Configuring media channels for schedule state groups

Configuring a media channel for schedule state groups enables you to track an agent adherence to the schedule when agents are scheduled to work on multiple media channels or when agents are working on a media channel that is currently not scheduled. Agents are considered non adherent, if they are non adherent on any one of those channels.

After implementation, WFM tracks multiple channel-related agent real-time states per time interval. See the following example of a contact center use case that might require multi-channel adherence tracking.

Use case: Tracking multi-channel adherence

A site in the contact center has voice and email related activities, and agents can make outbound calls, which are scheduled as exceptions. The schedule state groups can be configured as follows:

Schedule State Group	Channel	Schedule State	Real-time States
Inbound calls	Voice/Unspecified	All (immediate) voice-related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Outbound calls	Voice/Unspecified	Exception types that represent outbound call work	WaitForNextCall, CallRinging, AfterCallWork, CallOutbound
E-mails	(for example, email)	Deferred, email related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Overheads	None (no channel)	Breaks, meals, time off, exceptions, etc.	NotReadyForTheNextCall, LoggedOut

Important

Tracking multi-channel adherence is a new feature in WFM 8.5. If there is no schedule state group with a channel name under the site, WFM calculates adherence as it would for a single agent real-time state, and Stat Server aggregates the statistics as it did in previous WFM releases. However, if there is at least one schedule state group with a configured channel name, WFM tracks multiple channels. For each site, WFM tracks as many different channels as there are distinct channel names for all schedule state groups under the site.

For more information about how WFM calculates agent adherence for single channel and multi-channel sites, see [Adherence Calculations](#).

Reporting historical adherence for groups

Using the **History** pane, you can add or modify the Schedule State Group's effective date to ensure accurate reporting of historical adherence.

Effective dates in historical data

The **History** pane displays historical data; in other words, how the Schedule State Group has changed over time. It enables you to restore previous changes to the current state.

By setting an effective date, you specify that the historical change (the latest one in list) is actually effective from that specific date (and not immediately). Historical changes made before that are valid up to the effective date.



The effective date can be set on any latest historical change and many historical changes can have effective dates. This enables you to specify dates, from which changes are effective. This is important, because Adherence Reports are populated with information from the Schedule State Groups to determine adherence. Changing a Schedule State Group configuration without setting adherence, applies the latest changes to all data and adherence might be incorrectly calculated for dates, on which the previous Schedule State Group configuration should have been applicable.

After changing a Schedule State Group, it is best to apply the effective date, by indicating from which date it is applicable to ensure the **History** pane displays past changes and the effective date assignments.

Modifying the effective date

If you modify the effective date in the **Schedule State Group History** pane, the new date is applicable, starting at midnight on the effective date (not from the midnight of the current day in the site time zone, as is the default), and historical adherence is updated in the Adherence Reports.

To change the effective date:

1. Click **Modify** to open the **Set Effective Date** pane.
The current date in your site time zone is displayed, by default.
2. Click the date field to display a calendar, from which you can select an alternative date.
3. Click to **Apply**  the changes or **Close**  without modifying.

Loading historical data

To populate the **Historical Changes Records** section in this view, click **Load Historical Data**.

All historical change records, from the start date to the current day, will be displayed in the following columns:

- **Date and Time**—The date and time that the change was made.
- **Action**—Details of the changes.
- **Effective Starting**—The effective start date of the changes.