GENESYS

Workforce Management Web for Supervisors (Classic) Help

Staffing Build Wizard

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Use the wizard to build forecast staffing data for a single-site or multi-site activity, based on set parameters.

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Use the Staffing Build Wizard to build staffing data for a selected single-site activity or multi-site activity, based on parameters that you provide.

> ## Important
>
> Before using this wizard to build a staffing forecast, take these required actions:
>
> - Build interaction volumes and AHT for activities.
>
> - If necessary, create templates.
>
> - Build a volume forecast for multi-site activity for both IV and AHT.
>
> - Be aware that even if there is IV and AHT data for all child activities, this wizard does not build a staffing forecast for the parent multi-site activity.

For information about building staffing data for multiple activities, see Staffing Build Wizard for Multiple Activities.

Building the staffing data

This is Video 3 in a 4-video series. You can watch Video 2 here or, when you are ready to publish the forecast scenario, watch Video 4.

Link to video

To build staffing data:

1. On the Scenario Staffing View toolbar, click the **Build** button.
   The Staffing Build Wizard's first screen, Provide Target Date, opens.

2. Fill in the Provide Target Date screen and then click **Next**.

3. Fill in the Provide Target Options screen and then click **Next**.

4. The screen that appears next depends on what kind of activity you are staffing.

If you are staffing:

- An **Immediate** activity, and you select the **Use Service Level Objectives check** box, the Specify Service Level Objectives screen opens. If you do not select **Use Service Level Objectives**, the Staffing Requirements screen opens.

- A **Deferred** activity, the Multimedia Service Level Objectives screen opens.

- A **Fixed-Staff** activity, the Staffing Requirements screen opens.

Fill in each screen that opens, and then click **Finish**. In some cases, the Staffing Build Wizard displays values for objectives that were used for the most recent staffing build or the default forecasting objective values (if these have been specified and there were no previous builds). Otherwise, the parameter values are left blank.

The wizard closes and the **Scenario Staffing View** opens.

Alternatively, if you selected **Compare results with previous** on the second wizard screen, the **Scenario Build Results** window opens.

Activity types

The types of activities mentioned in the procedure above are described as follows:

- **Immediate** activity—Work activities that are handled by agents immediately, such as voice calls.

- **Deferred** activity—Backlog activities, such as email, that use special forecasting calculations.

- **Fixed-Staff** activity—Non-CTI activities that do not use Workforce Management service objectives.

Specifying the target date

Use the **Provide Target Date** screen in the Staffing Build Wizard to specify the target date range.

1. Select a Start Date and End Date using the spinner or the calendar.

2. Click **Next** to continue.

Specifying the target options

Use the **Provide Target Options** screen in the Staffing Build Wizard to specify the options described below.

Indirectly occupied time

At a minimum, enter a value for **Indirectly Occupied Time** (IOT). IOT is a parameter that helps define the queuing model that WFM uses when building a staffing forecast. This is why:

There is a certain pool of agents that WFM considers in its queuing model when determining how calls would be distributed from the queue to agents. IOT affects the availability of agents to handle calls. For example, if IOT is defined as 10%, that means that 10% of the time, an agent will not be in the agent pool (because the agent is off the phone).

To use template data, select the **Use Template Data** check box and click the **Load Templates** button to load the specific templates that you want to be used.

Initial Queue

If the selected activity has the type **Deferred**, then the **Initial Queue** field is displayed and inside it you must enter an integer value that is 0 or greater. You can leave this value empty, to indicate that the build process will assume that the value is 0.

Select the **Save initial queue time in default SL properties** check box if you want to save the initial queue value that you have specified as the new default service level value.

How is the Initial Queue Value Determined?

WFM Server posts a default value in **Initial Queue** field, based on existing information and calculations. WFM Server uses the ending queue value of the previous day as the default value. If it is the first day of the Forecast scenario, this value is taken from Master Forecast.

This same value is used in the Contact Center Performance Report's **Queue** > **Forecasted** column for the first day of the new forecasting period after you publish the Master Forecast.

For example, if you have published the Master Forecast for 02/02 - 08/02, the Contact Center Performance Report's **Queue** > **Forecasted** column for 09/02 displays the backlog value that is proposed in the Staffing Forecast Build wizard for 09/02 in the **Initial Queue** field.

> ### Tip
> The **Initial Queue** field is hidden for all activity types except **Deferred**.

Use service-level objectives

Select this check box to enable the Specify Service Level Objectives screen, later in the wizard.

Save IOT in default SL properties

Select this check box to save the IOT value as the new default value.

Compare results with previous

If you want to compare the results obtained from the Staffing Build Wizard with the previous staffing scenario results, select the **Compare results with previous** check box.

If you do so, after you have completed the wizard, the Staffing Build Results window opens, showing

a comparison of the new and previous results.

Save default SL objectives

If you are building staffing for a single (or multi-site) **Immediate** activity type, you can choose to update some or all of the default service level objectives with the new values you have specified. In the next step of the **Staffing Build Wizard**, you'll be able to choose which parameter values to save as the new defaults by selecting the **Update activity default SL objective** check box for each parameter you want to update. You can then apply the updates in one of two ways:

- **Remove all** is the default setting. For each parameter where the **Update activity default SL objective** option is selected, the default service level objective value for that parameter is updated to the new specified value while the default values (or templates) for all other parameters are cleared.

- When **Append selected** is selected, the default service level objective value for each parameter where the **Update activity default SL objective** option is selected is updated to the new specified value. The default values for all other parameters remain unchanged.

If you do not select the **Update activity default SL objective** check box for any parameters, the default values remain unchanged.

Click **Next** to open the wizard's next screen.

Defining the service-level objectives

Use the **Specify Service Level Objectives** screen in the Staffing Build Wizard to define service level objectives when you are building staffing volumes for immediate activities.

1. Select the check box(es) for one or more of the following:

    - **Use Estimated Average Time to Abandon (sec)**—This is not a service objective. It is a parameter that helps define the queuing system model used internally by WFM when building staffing requirements. The value you configure here should represent the average time it takes impatient callers to abandon.

    - **Use Service Level Objective**—You can specify that you want a specified percentage of calls answered in a specified number of seconds. For example, when building a staffing forecast, you may specify that 80% of calls should be answered in 20 seconds.

    - **Use Average Speed of Answer Objective**—**ASA (sec)**.

    - **Use Occupancy Objectives**—**Maximum Occupancy Rate (%)**. The total amount of time the agent is actually doing activity work as a percentage of the total amount of time the agent is available to do activity work. For example, assume an agent has a shift from 8 am-5 pm, with a 30-minute lunch and 2x15-min breaks. Although the agent's total shift duration is 9 hours, the total amount of time the agent is actually available for work is 8 hours, after subtracting the time for the lunch and breaks.

    - **Use Abandoned Interaction Objective**—**Maximum Percent of interactions Abandoned (%)**.

2. Enter values for each objective that you selected.
   When you select an objective's check box, you enable the text boxes for these target levels.

3. If you want to load an existing template to specify an objective's service levels, select **Use Template Data** and then click **Load Template**.

You might want to use a template if the values for the objective are different for different timesteps. Otherwise, WFM uses the single value that you configure and applies it across all open hours of the activity.

4. If you want to update the default service level objective values for the current activity type with the new values you have specified, select the **Update activity default SL objective** check box for each parameter you want to update. When building the staffing, WFM saves these new values as the default service level objectives for the current activity type.

> ## Important
>
> **If you are using templates to specify the parameter values, you can select only one template to save when choosing to update the default service level objectives for the activity. The Staffing Build Wizard will prompt you to select the template you want to save. The staffing will be built according to the values of all selected templates, but only the template selected to be saved will update the default service level objective value.**

5. Click **Finish**.
   WFM Web calculates the staffing volumes and displays them in the Staffing view. An error message appears if WFM Web cannot complete the calculation.

> ## Tip
>
> You can see the effect of other values by using the What-If window in the **Performance** module.

Defining the multimedia service-level objectives

Use the **Specify Multimedia Service Level Objectives** screen in the Staffing Build Wizard to define service level objectives for a Deferred staffing activity, such as responding to emails.

Use one of these two procedures:

1. Fill in the target for % of Deferred work in

a. Enter a value into each of the following fields: **Hrs**, **Min**, and **Sec**.

b. Select a radio button from this group:

  - **Hours (default)**—use these controls:
    - In the field below this choice, enter hours, minutes, and seconds.
    - Select one of these radio buttons: **Non-interrupted Time** (default) or **Interrupted Time**.
  - **Business days**—In the field below this choice, enter an integer greater than 0.

c. Select the **Save Deferred work in default SL properties** check box if you want to save the multimedia service level values you have specified as the default service level objective values.

d. Click **Finish**.

— OR —

2. Use the service level template

a. Select the **Use Service Level Template**.

b. Click **Load Template** to load an existing template.

c. Select the **Save Deferred work in default SL properties** check box if you want to save the multimedia service level values specified in the template as the default service level objective values.

d. Click **Finish**.

More about interrupted and non-interrupted time

When WFM calculates staffing, selecting interrupted time or non-interrupted time determines whether or not the Activity closed hours are counted.

For example, if you select **Interrupted Time** WFM does not account for the Activity closed hours when calculating the "idle in queue" time of interactions. If you select **Non-interrupted Time** WFM does account for the Activity closed hours when calculating the "idle in queue" time of interactions.

Defining the staffing requirements

Use the **Staffing Requirements** screen in the Staffing Build Wizard to define how staffing requirements are built. You will use this screen for Immediate activities if you do not define any service objective, or for Fixed-Staff activities.

1. Do one of the following:

   - Select **Number of Agents Each Time Step** and enter the appropriate number in the text box to the right.

   - Select **Average Activity Handling Time** and enter the appropriate value (in seconds) in the text box to the right.

   - Select **Use Staffing Template** and click **Load Template** to load an existing template.

2. Select the **Update activity default staffing requirements** check box if you want to update the default staffing requirement values with the new values you have specified.

3. Click **Finish**.
   WFM Web calculates the staffing volumes and displays them in the Staffing view. An error message appears if WFM Web cannot complete the calculation.

Viewing the staffing build results

If you selected the **Compare Results with Previous** check box on the first screen of the Scenario

Staffing Build Wizard, the **Scenario Staffing Build Results** view opens after you click **Finish** to complete the wizard.

The graph shows the new calculated staffing compared to the original calculated staffing.

- Where the new calculated staffing results in an increased number of agents, the graph shows the area in red.
- Where the new calculated staffing results in a decreased number of agents, the graph shows the area in green.

Click **Save** to keep the new calculated staffing in your scenario, or **Discard** to return to the original calculated staffing values.

Load forecast template

Use the **Load Forecast Template** window to select a forecast template. This window opens when you:

- Select **Use Templates** and click the **Load Templates** button in these Staffing Build Wizard screens: Provide Budgeting and Overhead Data, Specify Service Level Objectives, and Staffing Requirements. The window title includes the template type; for example, **Load Indirectly Occupied Time % Forecast Templates**.
- Select Template Based and click **Next** in the Volumes Build Wizard.

The template's type, and its associated activity, match your selections in the previous view or window.

To use this window:

1. Select a template in the list of available **Templates** at the upper left.
   The list shows each source template's name and, for overlap templates, its date range.

2. Select a **Start date** and **End date** at the lower left, using the date-selection controls.
   The date range that you can specify depends on the context from which you opened this window. For non-overlap templates, you cannot select dates outside the selected template's date range, and you cannot apply templates with overlapping date ranges.

3. Select the check boxes (at the lower left) beside any weekday to which you want to apply this template.

> ### Tip
> This does not apply to overlap templates.

4. Click **>>>** to apply the template.
   The template moves into the **Applied Templates** list at the upper right. That list shows your date and weekday selections, where applicable.

5. Repeat the preceding steps for any additional templates that you want to apply.

6. Click **if you want to remove any of your selections from the Applied Templates list.**

7. Click **OK** to load the templates that you have applied.
    You are returned to the window from which you opened the **Load Forecast Template** window.