Workforce Management Web for Supervisors (Classic) Help

Trading

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Contents

Understand the criteria for the schedule trade proposals included in the list of Trades.

Related documentation:

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The Trading topics explain how to review, and approve or decline, agents' proposed schedule trades.

Use the Trading features to:

- View a list of trade proposals.
- Add comments to proposals.
- View the schedule details for the agents involved in trades.

> ## Important
>
> If you do not see Trading information, or cannot configure objects or change settings in Web for Supervisors, you might not have the appropriate role privileges. See Trading Role Privileges in this Help. Also, you must configure WFM Web to initiate trading for agents. To implement this feature, contact your Genesys Professional Services representative.

Criteria for the list of trades

The List of Trades displays a week's schedule trading information for a single site at a time. Controls enable you to view details about each trade, to accept or decline the trade, and to enter comments about your decision.

Trade proposals appear in the list of trades if they meet the following criteria:

- The trade has not been automatically approved. Automatic approval is based on WFM's built-in trade rules or on exception types' own configured trade rules.
- The trade has not been automatically cancelled. WFM automatically cancels a proposed trade if either agent's schedule has been modified in some way in the Master Schedule since the trade request was made. For example, a supervisor has explicitly modified the agent schedule; or another trade, with overlapping schedule data, has been approved and executed.
- The trade has not been automatically declined. WFM automatically declines a proposed trade if either agent's schedule overlaps with overnight schedule from the previous day for a recipient agent.
- The trade has not yet been explicitly approved or declined by any supervisor. Once acted upon, trades no longer appear in the list.

If a trade proposal has not been approved or declined by its effective date, the proposal expires and the trade does not occur.

How trading works

A trade can include up to six full weeks of schedule days. Every schedule trade requires:

- One agent's proposal for a trade. The proposal specifies which schedule days this agent wants to trade.
- Another agent's response to that proposal. The response indicates this agent's willingness to accept the proposed trade.
- An approval, either automatically by WFM or explicitly by a supervisor.

For some trades, the proposing agent must explicitly accept the response before submitting the trade for approval. This is always true for community proposals, which are offered to all agents within a team, site, or business unit (if multi-site trading is permitted).

If a trade is approved, WFM executes it and both agents' schedules are changed to reflect it. After execution, WFM removes the trade from the **Trading** > **List of trades** view and you will see it only in the Schedule Trade report.

Not all trades are approved. For example:

- Under certain conditions (when one agent is not qualified for the other agent's scheduled activities), WFM automatically declines a trade.
- If either agent's schedule is changed before a pending trade's approval, the trade is automatically canceled.
- A supervisor may explicitly decline a trade.
- If a pending trade has not been approved before the first day involved in the trade, it expires.

In each of these cases, the trade does not occur.

Requirements for a successful trade

A trade can take place after the following steps are completed. (See the *Workforce Management Agent Help* for details about how agents perform the first three steps.)

- One agent creates a community or personal trade proposal.
- At least one agent responds to the community proposal, or the receiving agent accepts the personal proposal.
- The proposing agent accepts a response to a community or personal proposal. (This step is required for personal proposals only if the proposing agent specified manual approval.)
- The trade receives either WFM's automatic approval or a supervisor's explicit approval.

> **Tip**
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> At all steps before approval, a pending trade can fail in one of three ways: either agent can cancel it; the trade can automatically be canceled if either agent's schedule is changed, or the trade can expire.

Testing trades for automatic approval

Once both agents have accepted a trade proposal, WFM tests it for automatic approval. These tests evaluate the trade using the conditions listed in each of the following sections:

Exceptions trade conditions

If either agent has a scheduled exception on any of the days to be traded, WFM tests the trade against the trade rules configured for that exception type. For example, exceptions that count as vacation time always have either the **Delete**, **Keep with agent**, or **Do not trade** rule.

Here is how WFM acts on each trading rule:

Exception Trade Rule:	How WFM Responds:
Delete	Allows the trade to proceed to the next test, but deletes the exception from the schedule.
Do not trade	Agent is not allowed to create a trading proposal on a day with scheduled exception "Do not trade".
Keep with agent	Allows the trade to proceed to the next test, but keeps the scheduled exception with the original agent.
Keep with schedule	Allows the trade to proceed to the next test, and trades the exception along with the schedule.

Auto-decline conditions

WFM automatically declines a trade if either agent's schedule overlaps with the overnight schedule from the previous day for a recipient agent.

If multi-site trading is permitted, WFM automatically declines a trade if:

- A scheduled shift cannot be matched with a shift on another site
- A scheduled exception type is not available on another site
- A scheduled marked time is not available on another site
- A scheduled time-off item is not available on another site

Supervisor approval conditions

WFM places a trade "in review"—a status that requires a supervisor to approve the trade— if the trade involves any of the following conditions:

- The traded schedules have different paid hours.
- Either agent is trading days off for working days.
- Either agent has a scheduled exception with the delete rule enabled.
- Either agent is trading a keep with agent exception for fixed-staff work.
- The trade violates an agent's availability (contract availability, granted availability preferences, or rotating availability).
- The trade violates certain contract terms or site rules: minimum or maximum working hours per day or per week; minimum or maximum days off per week; or minimum time off between consecutive working days.

Auto-approval conditions

If a schedule trade does not match any of the Auto-Decline or Supervisor Approval conditions, WFM automatically approves it and trades the schedules.

Auto-cancel conditions

WFM automatically cancels a trade proposal, a response, or a pending trade in review if either agent's schedule is modified in the Master Schedule. Examples of auto-cancel conditions are:

- A supervisor explicitly modifies either agent's schedule.
- Another trade is approved and executed for either agent that involves a schedule period that overlaps with the schedule period for this trade.

Expiration conditions

If a trade has not received approval by the day before its first included day, it expires, and can no longer be approved by any agent or supervisor.

List of trades

The **List of Trades** view displays a table of agents' proposed schedule trades, standard date-selection controls, buttons to accept or decline each pending trade, and a drop-down list that modifies the table's contents.

Multi-site trading

If multi-site trading is permitted in your environment, agents can trade shifts across different sites within the same business unit. If the trade participants are located in different sites, you might see

the same trade under two different sites.

Depending on which sites you have access rights to, you can either fully approve the trade or partially approve it (if you have access rights to only one of the two sites in the trade). When you partially approve a trade, you receive an appropriate warning message (that the trade needs further approval) and the trade remains in **Pending** status until a supervisor with the required site access rights completes the trade approval process.

Displaying the list of trades

To open the List of Trades view:

1. Click **Trading** > **List of Trades**.
   The List of Trades view opens.

2. In the **Objects** tree, select a site, teams, and/or agents.
   Expand business units to display their sites and sites to display their teams and agents.
   Select any number of agents and/or teams within a single site.
   If you select a new site or its teams/agents, this clears any previous selection that you made within a different site.

3. Click **Get data** to populate the table for the selected agents.

Using the table

The **List of Trades** table shows all of the proposed schedule trades that meet the following criteria:

- At least one trade participant is among the agents that you selected in the Objects tree.

- The trade can still be accepted or declined. (Once accepted or declined, trades no longer appear in the table.)

- The trade is within the selected week. (To see other weeks, use the date-selection controls at the upper right.)

Each proposed trade appears on two rows. (If a scroll bar appears to the right, you can use it to reveal more trades.) The table includes the following columns:

- **Dates**—The start and end dates for the proposed trade.

- **Agent Name**—The names of both agents involved in the trade.

- **[Weekdays]**—The agent's schedule information for the specific day in the trade. The cell contents correspond to your selection from the Show data for drop-down list.

If the agent is not scheduled for a shift on this day, the cell contains **Day Off**, **Vacation**, **Working Hours** (for scheduled working hours without a shift), or an exception name (for scheduled full-day exceptions). A blank cell indicates that this day is not included in the proposed schedule trade.

- **Paid Hours**—Total paid hours in the trade proposal.

- Details *button*—Displays schedule details for both agents involved in the trade.

Accepting and declining trades

To accept or decline proposed trades:

1. Select one or more trades in the table to select them.
2. Select one of the following options from the view's right side (or on the **Actions** menu):
   - **Accept**—Opens the Comments window for you to add an (optional) comment and approve the selected trade(s)
   - **Decline**—Opens the Comments window for you to add a (required) comment and reject the selected trade(s).

Show data for

From this drop-down list, you can select what you want to display inside each day's table cell:

- **Total Paid Hours**—The total paid hours for each day.
- **Working Start/End Time**—The start and end times of agents' work. (Default display option.)
- **Shift or Schedule State Names**—The names of agents' assigned shifts for each day.

Trading comments

Use the **Trading Comments** dialog box to confirm your acceptance or rejection of a proposed schedule trade, and to add a comment about your decision:

1. Type your comment into the **Comments** text box.
   A comment is required when you decline a trade, but it is optional when you accept a trade.
2. Do one of the following:
   - Click **OK** to attach your comment and confirm the trade's acceptance or rejection.
   - Click **Cancel** to discard your comment and take no action on the proposed trade.

Clicking either button closes the window and returns you to the List of Trades view.

Schedule details

Use the **Schedule Details** dialog box to view schedule information for both of the agents in a proposed schedule trade.

Each column displays one agent's information, in the following rows:

- **Agent**—The agent's name.
- **Date**—The date for which details are displayed.
- **Paid Hrs**—The agent's total paid hours for the scheduled states/activities.

- **Schedule Details**—The states or activities for which the agent is scheduled.

- **Sch. Attendance: Start Time**—The agent's scheduled start time for these states/activities.

- **Sch. Attendance: End Time**—The agent's scheduled end time for these states/activities.