MT SaaS

Workforce Management Administration Guide

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Contents

About this guide

The *Workforce Management Administration Guide* provides instructions for setting up work queues, activities, work rules and employee settings for the Workforce Management (WFM) application. Once configured, these components are used for creating optimal schedules that balance employee needs with business needs.

Intended audience

This guide is designed for system administrators who are responsible for:

- Planning and setting up the Workforce Management (WFM) product.
- System administration and maintenance for the Workforce Management (WFM) product.
- Using the Workforce Management (WFM) product.

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Document revision history

Revision	Description of changes
1.00	• *Customize a special activity for an organization*: Added a note, indicating that in an MT SaaS environment, tenants *cannot* modify their own special activities. • *Workflow: Set up normal queues*, *Edit work queue to map data source groups to normal queues*, and *Map data source groups to queues*: Added notes, indicating that in an MT SaaS environment, the tenant administrator can create and map queues to distributed or virtual parent queues, but they *cannot* create a mapping between data source groups and normal work queues.

Chapter 1

Getting started with WFM

Workforce Management (WFM) allows you to schedule the right *people* with the right *skills* in the right *place* at the right *time*.

Topics

Introduction to Workforce Management (WFM)

Workforce Management (WFM) allows you to schedule the right *people* with the right *skills* in the right *place* at the right *time*.

Why is Workforce Management important?

Personnel costs are the largest percentage of overall operating costs. These costs include salaries, training, management, bonuses, and more.

When not managed properly, you can have too many employees scheduled at the same time to handle a specific workload. This situation can leave some employees in an unproductive state. Under these circumstances, labor costs are high while productivity is low.

Alternatively, maybe you do *not* have enough employees scheduled at the same time to handle a specific workload. This situation leads to not meeting your service goals. Employees can feel overworked and stressed in this environment.

The goal of Workforce Management is to build optimal schedules that take all these factors into account.

Employee needs vs. business needs

Companies must balance employee needs with their business needs.

Employees like predictability. This predictability can be defined in a schedule. A schedule indicates the number of hours they are working every day with other activities taken at defined times (such as breaks, lunches, and training).

The WFM application generates a schedule based on:

- Defined service goals of the company
- Work forecasts
- Employee work patterns and preferences

Examples of scheduling challenges

To create optimal schedules, take the following scheduling challenges into account:

- What service level do you want to provide?
- How many customer interactions or work units do you receive during a specific time period?
- How much time does each interaction or work unit require?
- What skills are needed for each interaction or work unit?
- What skills do each of your employees have?
- What shifts can each employee work every day?
- How many employees can work at the same time?
- When does each employee take breaks and lunch?
- How closely do employees adhere to the schedule?
- How do you incorporate employee preferences?
- What are good times for meetings, training and projects?
- Is quality of service maintained throughout the day?

Goals of the Workforce Management application

The Workforce Management (WFM) application:

- Allows you to set service goals for how quickly you want work to be handled
- Helps measure and capitalize on the individual talents and preferences of each employee
- Ensures that employee skills and proficiencies are aligned with business objectives and customer needs
- Uses historical data to build forecasts that are statistically probable for specific work queues
- Builds an optimal schedule that balances employee needs with business needs

Related topics

Generating schedules in WFM, page 13

Setting up scheduling components, page 15

Generating schedules in WFM

The goal of the WFM application is to create an optimal schedule for your organization. You can automatically generate a schedule based on specific work rules you define in the **Work Administration** module. The **Generate schedule** option is the recommended and optimal way to generate a schedule.

There are alternate ways to generate a schedule as well, including manually creating it using the Calendar, importing it from an external source, and generating the schedule for multiple scheduling periods as a batch operation.

Automatically generate the schedule

If you create a schedule on a recurring basis, set up the WFM work rules using the **Work Administration** module. Then, generate the schedule from the **Forecasting and Scheduling** module.

Base your schedules on work queues, work rules, and skills that fit your organization and employees. These components do *not* typically change that often. Use them to generate schedules for different scheduling periods. They serve as templates from which you can make more updates from the calendar.

Once you set up the components, you can generate the schedule from the **Forecasting and Scheduling** module using the **Generate schedule** option. After the schedule is generated, you can manually update it with more shift assignments, shift events, calendar events, time-off events, unavailability events, and classes.

Other ways to create the schedule

You can also create the schedule in the following alternate ways:

- **Manually create or edit the schedule**: After selecting the calendar data on the left pane (**Campaign**, **Dates**, **Employees** and **Queues**), you can manually add shifts, shift events, calendar, time-off and unavailability events, and classes on the calendar. Manually creating the *entire* schedule is a time-consuming process. Therefore, it is highly recommended to use the automatic **Generate schedule** option and make any needed manual updates.

  To schedule calendar events, time off events, unavailability events, and classes, you *must* manually add them to the calendar. The manual method is also useful when you need to create non-standard shift assignments, or any schedule components that are *not* based on predefined work rules.

- **Import the schedule from an external source**: Outsourcers can create schedules externally, and you can import them back into the system. Schedule data can be shared with outsourcers to allow them to create the schedules. This capability is important for contact centers that share calls across their own sites and outsourced centers.

  Using WFM, outsourcers export employee schedules as XML files using the adapter, *Generic - Outsourcer Staffing Profile Export*. Based on this data, outsourcers create schedules for the staff. Outsourcer schedules can then be imported back into WFM, using the adapter, *Generic - Outsourcer Staffing Profile Import*. You can manually import the schedules from the Forecasting and Scheduling module.

- **Generate the schedule for multiple scheduling periods**: You can set up and run campaign scheduling periods as a batch (multiple scheduling periods at the same time). This option is helpful for Regional Managers. If they set up multiple scheduling periods in multiple campaigns, they can generate the schedule for all of them at the same time.

Related topics

Setting up scheduling components, page 15

Related information

Generating the schedule (*WFM Forecasting and Scheduling Guide*)

Setting up scheduling components

Before generating a schedule for your workforce, set up the scheduling components: *work queues*, *activities*, *work rules, and skills*.

Prerequisites to setting up scheduling components

Verify the following before setting up scheduling components:

- Your organization hierarchy fits the requirements of your company.
- The following organization parameters are defined correctly:
  - **Week Start Day**: Defines the organization weekly start day. This setting is critical for WFM, as it directly impacts campaigns.
  - **Day Boundary**: Defines the time that is considered the end of a day (for example, midnight). This parameter is critical for defining schedules in WFM.

> After you create the organization and associate employees and work rules with it, the **Week Start Day**, **Day Boundary** and time zone *cannot* be changed.

Work queues, activities, work rules and skills

Set up the following scheduling components before generating a schedule:

1 **Work queues**

Create *work queues*, which represent demand. They help us predict workload by multiplying the volume of customer interactions by their expected handling time. Workload is used in the scheduling process as a target for determining resourcing. Knowing how many people you need to meet workload requirements is key to generating efficient schedules.

2 **Activities**

Create *activities*, which are the core components of both schedules and time records. When an employee signs into the system and performs any kind of work, activities specify the scheduled work and capture employee adherence to the schedule.

3 **Work rules**

Define *work rules*, which are the means of creating schedules. They reflect both the needs of your organizations and individual employees. The scheduling engine uses the information, such as work patterns and assignment rules (optionally), to create schedules that reflect this balance.

4 **Skills**

Create *skills* that parallel the skills needed to deal with the workload—then link employees to skills. Skills are required for skill-based scheduling. If you are *not* performing skill-based scheduling, you do *not* need to create skills.

Related topics

Workflow: Set up normal work queues, page 20

Workflow: Set up activities, page 45

Workflow: Set up work rules, page 77

Workflow: Set up skills, page 150

Related information

Creating organizations (*Workforce Optimization User Management Guide*)

Work queues

Create work queues, which represent demand. They help us predict workload by multiplying the volume of customer interactions by their expected handling time.

Topics

Work queues overview

Create work queues, which represent demand. They help us predict workload by multiplying the volume of customer interactions by their expected handling time.

Work queues linked to scheduling periods

After you create a work queue, you need to link it to a *scheduling period*. A *scheduling period* is a specified period of time when defined employees target a specific workload. A *campaign* is a collection of *scheduling periods*. Schedules are generated for groups of employees who belong to a scheduling period. A work queue *must* belong to an organization that is linked to the scheduling period. Each work queue can only be linked to *one* campaign in a specific scheduling period.

Work queues defined by media types

Work queues can be represented by a combination of different media types (such as **Phone**, **Chat**, **Face to Face**, **Callback**, **Email**, **Outbound**, **Operations** or **Social Post**). Workload is used in the scheduling process as a target for determining resourcing. Knowing how many people you need to meet workload requirements is key to generating efficient schedules.

Work queues can be identical to an ACD (Automated Call Distributor) queue, but are not limited to a one-to-one mapping. They are visible in Queue Analytics for monitoring contact statistics.

Work queues associated with skills

Work queues can be linked to skills for skill-based scheduling. When you define a scheduling period, select the **Skill Based** attribute. You can then associate a queue with a specific skill (under **Campaign**, **Queues**).

Types of work queues

There are four different types of work queues:

- **Normal**: Used in regular campaigns. Normal queues collect interaction statistics from data source groups. If you do not have a Multi-Site license, all your work queues are normal queues. When you create a normal work queue, you need to map data source groups to the queue. This mapping translates the data from the data source reports to the work queues.
- **Distributed**: Used in multi-site scheduling. Workload in this queue is allocated *among the sites* using a percent allocation method, regardless of employee availability. *This type of queue can only be added to a campaign that has at least one defined subcampaign*.
- **Virtual**: Used in multi-site scheduling. Workload in this queue is sent to all *sites* using a dynamic method of distribution. Interactions are routed dynamically wherever employees are available. You can add this type of queue to a stand-alone campaign only. *Campaigns that are subcampaigns or that allow subcampaigns cannot have virtual queues*.
- **Process**: Used to identify and define a resolution process. A resolution process refers to a group of linked queues that can be assigned and are used to define a higher-level service goal.

Queues for multi-site operations

In multi-site operations, multiple physically separate sites share a workload. The data is then combined into a summary (or parent) work queue.

You can create either *distributed* or *virtual* queues as the parent queues for multi-site operations. You then need to map normal or process child queues to the parent queue.

Related topics

Workflow: Set up normal work queues, page 20
Workflow: Set up work queues for multi-site operations, page 26
Create a process work queue, page 25

Related information

Campaigns and scheduling periods overview (*Workforce Management Forecasting & Scheduling Guide*)

Workflow: Set up normal work queues

Create normal work queues. Then, create a mapping between specific data source groups and the queues.

In multi-site operations, normal work queues can be mapped to distributed or virtual parent work queues.

> In an MT SaaS environment, the tenant administrator can create and map queues to distributed or virtual parent queues (**Parent Work Queue Mapping**). However, the tenant administration *cannot* create a mapping between data source groups and normal work queues. The service provider *must* map queues to data source groups for the tenant.

Before you begin

Verify that the relevant data sources and data source groups have been created.

Workflow

1. Create a normal work queue, page 20

   Define a normal work queue, which is used in a regular campaign. Normal queues collect interaction statistics from data source groups. Most work queues are normal queues. If you do *not* have a Multi-Site license, all your work queues are normal queues.
2. Edit work queue to map data source groups to normal queues, page 23

   To begin the process of mapping data source groups to queues, select to edit the work queue.
3. Map data source groups to queues, page 24

   Create a mapping between data source groups and normal work queues. This mapping allows you to translate the data from the data source reports to the work queues.

Related topics

Workflow: Set up work queues for multi-site operations, page 26

Create a process work queue, page 25

Related information

Data sources and data source groups (*Workforce Optimization System Administration Guide*)

Workforce Management SaaS considerations (*Workforce Optimization Multi-tenant SaaS Service Provider Reference Guide*)

Create a normal work queue

Define a normal work queue, which is used in a regular campaign.

Normal queues collect interaction statistics from data source groups. Most work queues are normal queues. If you do *not* have a Multi-Site license, all your work queues are normal queues.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, **Settings**.
2. From the left pane, select the organization for which you want to create the queue.

3. From the lower right corner, select **Create work queue**.
4. On the **Work Queue Settings: Work Queue Details** screen, complete the fields.
   In the **Type** field, **Normal** is selected by default.
5. Select **Save**.
   The work queue now appears on the **Queues** page.

What to do next

Edit work queue to map data source groups to normal queues, page 23

Related topics

Work queue settings, page 21
Workflow: Set up normal work queues, page 20
Create a distributed or virtual work queue, page 26
Create a process work queue, page 25

Related information

Data sources and data source groups (*Workforce Optimization System Administration Guide*)

Work queue settings

When creating or editing a work queue, define or update data about the work queue.

Setting	Description
Name	Defines the name of the work queue.
Description	Optional: Describes the work queue.
Media	Specifies the media for the work queue. For example: **Phone**, **Email**, **Fax**, **Chat**, **Social Post**, **Callback**, **Face-to-Face**, **Operations**, **Project**. When creating a **Process** queue, select a media type of **Resolution**.

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Type</td><td>Specifies the type of work queue:
Normal: Used in regular campaigns, and collects interaction statistics from data source groups. If you do not have a Multi-Site license, all your work queues are Normal queues.
Distributed: Used in multi-site scheduling, where workload is allocated among the sites, regardless of employee availability. A predetermined percentage of interactions is routed to each site in each interval.
Virtual: Used in multi-site scheduling, where workload is sent to all sites. Interactions are routed dynamically wherever employees are available.
Process: Used to identify and define a resolution process, which is a group of linked queues that define a higher-level service goal.
Work queues whose media is Phone Outbound can only be Normal or Virtual work queues.</td></tr>
<tr><td>Organizations</td><td>Specifies the owner organization for the work queue.
Linking work queues to organizations allows administrators to create and maintain the set of work queues that are only relevant to a particular organization.
Work queues created for one organization are also available to the child organizations of the parent organization.</td></tr>
<tr><td>Data Source Groups Mapping</td><td>Displays the data source groups that are mapped to the normal work queue.
If you have not yet mapped data source groups to work queues, this field is blank.
NOTE: This field is only relevant to normal work queues. Data source groups can only be mapped to normal work queues.</td></tr>
</table>

Related topics

Create a normal work queue, page 20

Create a distributed or virtual work queue, page 26

Create a process work queue, page 25

Edit work queue to map data source groups to normal queues

To begin the process of mapping data source groups to normal queues, select to edit the work queue.

> In an MT SaaS environment, the tenant administrator *cannot* create a mapping between data source groups and normal work queues. The service provider *must* map queues to data source groups for the tenant.

Before you begin

- Create a normal work queue, page 20
- Verify that data sources have been created.

  Data sources are third-party systems that generate employee and device state, and data change events. For each third-party data source, create and configure a corresponding data source in WFO.
- Verify that data source groups have been created.

  Data source groups represent an external identifier for a segment of work. Data source groups are linked to queues. You can link multiple data source groups to work queues if they have a low volume of work.

> Data sources are usually configured during integration by Professional Services. If you want to add a new data source, contact Professional Services to complete the integration.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Work Queue Group Mapping**.
2. From the left pane, select the organization for which you want to map data source groups to normal work queues.
3. Under **Queues**, select the normal work queue to which you want to map data source groups.
4. From the lower right corner, select **Edit work queue**.

   The available data sources are data sources associated with the selected organization and its ancestors.

What to do next

Map data source groups to queues, page 24

Related topics

Workflow: Set up normal work queues, page 20

Workflow: Set up work queues for multi-site operations, page 26

Create a process work queue, page 25

Related information

Workforce Management SaaS considerations (*Workforce Optimization Multi-tenant SaaS Service Provider Reference Guide*)

Map data source groups to queues

Create a mapping between data source groups and normal work queues. This mapping allows you to translate the data from the data source reports to the work queues.

Only *normal* work queues with no subqueues and that are not subqueues themselves can be used for mapping data source groups.

> In an MT SaaS environment, the tenant administrator *cannot* create a mapping between data source groups and normal work queues. The service provider *must* map queues to data source groups for the tenant.

Before you begin

Edit work queue to map data source groups to normal queues, page 23

Procedure

1. From **Available Data Source Groups**, select the data source group you want to map, and select **Assign right**.

   The data source group now appears under **Mapped Data Source Groups**.
2. To remove a mapped data source group, select it from **Mapped Data Source Groups** and select **Assign left**.

   It now appears under **Available Mapped Data Source Groups**.
3. To view details about a data source, select **Go to Data Source Group Definition**.

   The system navigates you to **Integration Management**, **Data Sources**, and **Settings**. Under **Data Source Name**, select a data source for which you want to view more information.

   This option brings you out of the **Work Administration** module. To complete any data source and work queue mapping, go back to **Work Administration**. Under **Work Queues**, select **Work Queue Group Mapping**.
4. Select **Save Mapping**.

   On the **Queues** screen, the data source groups appear for the normal queue under **Data Source Groups Mapping**.

Related topics

Workflow: Set up normal work queues, page 20

Work queue settings, page 21

Related information

Workforce Management SaaS considerations (*Workforce Optimization Multi-tenant SaaS Service Provider Reference Guide*)

Create a process work queue

To identify and define a resolution process, create a process work queue. A resolution process is a group of linked queues that are used to define a higher-level service goal.

In multi-site operations, process work queues can be mapped to distributed or virtual parent work queues.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Settings**.
2. From the left pane, select the organization for which you want to create the queue.
3. From the lower right corner, select **Create work queue**.
4. On the **Work Queue Settings: Work Queue Details** screen:
   a. For **Type**, select **Process**.
   b. For **Media**, select **Resolution**.
5. On the **Work Queue Settings: Work Queue Details** screen, complete the remaining settings.
6. Select **Save**.

   The work queue now appears on the **Queues** page.

Related topics

Work queue settings, page 21
Workflow: Set up normal work queues, page 20
Workflow: Set up work queues for multi-site operations, page 26

Workflow: Set up work queues for multi-site operations

Create distributed or virtual parent work queues for multi-site operations. After creating the parent queues, map child queues to them.

In multi-site operations, multiple physically separate sites share a workload. The data is then combined into a summary (or parent) work queue. You can create either *distributed* or *virtual* queues as the parent queues for multi-site operations. You then need to map normal or process child queues to the parent queue.

Before you begin

Workflow: Set up normal work queues, page 20 or Create a process work queue, page 25

Workflow

1. Create a distributed or virtual work queue, page 26

   Create a distributed or virtual parent work queue for multi-site operations.
2. Edit work queue to map child queues to parent queues, page 27

   Map child queues (normal or process queues) to the parent queue (distributed or virtual).

Related topics

Workflow: Set up normal work queues, page 20

Create a process work queue, page 25

Related information

Multi-site operations (*Workforce Optimization Forecasting and Scheduling Guide*)

Create a distributed or virtual work queue

Create a distributed or virtual parent work queue for multi-site operations.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Settings**.
2. From the left pane, select the organization for which you want to create the queue.
3. From the lower right corner, select **Create work queue**.
4. In the **Type** field, select either **Distributed** or **Virtual**.
5. On the **Work Queue Settings: Work Queue Details** screen, complete the remaining settings.
6. Select **Save**.

   The work queue now appears on the **Queues** page.

What to do next

Edit work queue to map child queues to parent queues, page 27

Related topics

Work queue settings, page 21

Edit work queue to map child queues to parent queues

To begin the process of mapping child queues to parent queues, select to edit the work queue.

Before you begin

Create a distributed or virtual work queue, page 26

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Parent Work Queue Mapping**.
2. From the left pane, select the organization for which you want to map child queues to parent queues.
3. Under **Queues**, select the parent queue you want.
4. From the lower right corner, select **Edit work queue**.

   On the **Work Queue Mapping** screen, only the individual queues that have *not* yet been mapped to a campaign appear.

What to do next

Map child queues to parent queues, page 27

Related topics

Workflow: Set up normal work queues, page 20

Map child queues to parent queues

Map child queues (normal or process queues) to the parent queue (distributed or virtual).

You can *only* map normal or process queues to distributed or virtual queues. Normal and process queues are child queues, and distributed and virtual queues are parent queues.

Before you begin

Edit work queue to map child queues to parent queues, page 27

Procedure

1. From **Available Normal Work Queues**, search or select the queue you want to map to the parent queue, and select **Assign right**.

   The child queue now appears under **Mapped Work Queues**.
2. Optional: To remove a mapped work queue, select it from **Mapped Work Queues** and select **Assign left**.

   The child queue now appears under **Available Normal Work Queues**.
3. Select **Save Mapping**.

   On the **Queues** screen, the child queues appear for the parent queue under **Parent Queue Mapping**.

Related topics

Workflow: Set up work queues for multi-site operations, page 26

Work queue settings, page 21

Edit a work queue

You can modify the name, description, media, type, and organizations of a defined work queue.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Settings**.
2. From the left pane, select the organization for which you want to edit the queue.
3. On the **Queues** screen, select the queue you want to edit.
4. Select **Edit work queue**.
5. On the **Work Queue Details** screen, edit the fields you want.
   You can only edit the values in the **Media** and **Type** fields if the work queue is *not* currently in use.
6. Select **Save**.
   The updated details of the work queue appear on the **Queues** screen.

Related topics

Copy a work queue, page 30
Cleaning up skills, work rules, and queues, page 169

Copy a work queue

Copying a work queue is useful if you want to create a similar queue with a few different attributes.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Settings**.
2. On the **Queues** screen, select the queue you want to copy.
3. Select **Copy work queue**.

   The copied work queue appears on the **Queues** screen with the prefix **Copy Of** and the name of the queue. For example, you copied the queue, **Spanish Call Center**. The copied queue name is: **Copy Of Spanish Call Center**.
4. To rename the copied work queue for the selected organization:
   a. Select the work queue and select **Edit work queue**.
   b. In the **Name** field, edit the name and select **Save**.

Example: Copy work queue

1. You copy the work queue, **Copy of Spanish Call Center**, for the **Operations** organization.

   The name of the copied work queue is **Copy of Spanish Call Center**.
2. Select **Copy of Spanish Call Center** and select **Edit**.
3. Rename the work queue to: **Spanish Call Center**.

Related topics

Edit a work queue, page 29

Workflow: Create work queue filters

To filter work queues, create work queue attributes with values.

Example: Create attributes for work queue filters

1. Create an attribute called *Business Domain*.
2. For this attribute, add the values: *Call Center* and *Back Office*.
3. For each work queue, select whether the *Business Domain* attribute is set to *Call Center* or *Back Office*.
4. Go to a page that has a work queue selection pane (such as Queue Analytics).
5. Create a work queue filter.
6. Filter work queues by *Call Center* or *Back Office* for the *Business Domain* attribute.

Before you begin

Create the relevant work queues:

- Create a normal work queue, page 20
- Create a distributed or virtual work queue, page 26
- Create a process work queue, page 25

Workflow

1. Create work queue attributes, page 31
   To create filters for work queues, define the work queue attributes and their values.
2. Select work queue to set attributes, page 33
   For each work queue, set the values of each defined attribute.

Create work queue attributes

To create filters for work queues, define the work queue attributes and their values.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Work Queue Attribute Definition**.
2. From the left pane, select the organization for which you want to create the work queue attribute.
3. Select **Create**.
4. On the **Work Queue Attribute Definition** screen, complete the fields.
5. If you selected **Drop down list** from the **Type** field:
   a. Under **Distinct Drop Down Values**, select **Add** and enter a value for the drop-down list.
   b. To add another value, select **Add** again and enter the value.
   c. To add more values, repeat step b.
6. Select **Save**.
   The new work queue attribute appears on the **Work Queue Attribute Definition** screen.

What to do next

Select work queue to set attributes, page 33

Related topics

Work queue attribute definition fields, page 32

Work queue attribute definition fields

When creating or editing filters for work queues, define or update work queue attributes and their values.

Field	Description
Name	Defines the name of the work queue attribute. For example: *Business Domain*
Description	Optional: Describes the work queue attribute. For example: *Specifies the type of business in which the work queue is used*.
Type	Specifies the type of data you can enter for the attribute, including: • **Text**: Allows you to enter free-form textual data when defining attributes for each queue. • **Numeric**: Allows you to enter numbers for the attribute when defining attributes for each queue. • **Drop down list**: Allows you to define a drop-down list of values, which you can select when defining attributes for each queue. • **Date**: Allows you to select a date from a calendar date selector when defining attributes for each queue.
Distinct Drop Down Values	If the **Type** field is set to **Drop down list**, you can add values for the drop-down list for the attribute. For example, if the attribute is *Business Domain*, you can define the drop-down values to be *Call Center* and *Back Office*.

Related topics

Create work queue attributes, page 31
Edit work queue attributes, page 32

Edit work queue attributes

After defining work queue filters, you can edit work queue attributes and their values.

Before you begin

Create work queue attributes, page 31

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Work Queue Attribute Definition**.
2. From the left pane, select the organization for which you want to edit the work queue attribute.
3. From the **Work Queue Attribute Definition** screen, select the work queue attribute you want to edit.
4. Select **Edit**.
5. Edit the fields you want, and select **Save**.

Related topics

Work queue attribute definition fields, page 32

Delete work queue attributes, page 33

Delete work queue attributes

If required, you can delete work queue attributes.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Work Queue Attribute Definition**.
2. From the left pane, select the organization for which you want to delete the work queue attribute.
3. From the **Work Queue Attribute Definition** screen, select the work queue attribute you want to delete.
4. Select **Delete**.
5. To confirm the deletion, select **OK**.

   The work queue attribute is removed and no longer appears on the **Work Queue Attribute Definition** screen.

Related topics

Work queue attribute definition fields, page 32

Edit work queue attributes, page 32

Select work queue to set attributes

Select the work queue for which you want to set the values of defined attributes.

Before you begin

Create work queue attributes, page 31

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Work Queue Attributes**.
2. From the left pane, select the organization for which you want to set attribute values for work queues.
3. On the **Work Queue Attributes** screen, select the work queue for which you want to set attribute values.

4 Select **Edit**.

The work queue attributes appear for the selected work queue.

What to do next

Set attribute values for a work queue, page 34

Related topics

Edit work queue attributes, page 32
Work queue attribute definition fields, page 32

Set attribute values for a work queue

For the selected work queue, set the values of each defined attribute.

Before you begin

Select work queue to set attributes, page 33

Procedure

1 For each work queue attribute for the selected work queue, set the values you want.

For example, you selected the work queue, *Queue 1*. For *Business Domain*, select the value, *Call Center*. For *Language*, select *English*. When you filter work queues by *Call Center* and *English* for these attributes, this work queue is included in the filter.

2 Select **Save**.

The values you set for these attributes appear for the selected work queue.

Related topics

Edit work queue attributes, page 32
Work queue attribute definition fields, page 32

VCT work queues

For Operations environments, a VCT work queue has work volumes associated with it, and also captures employee level productivity data at a finer Intraday granularity.

This work queue is available for employees, managers, and supervisors to enter VCT data or productivity tracking data. You can enter VCT data by going to **My Tasks** or **Volume History** under **My Tracking** in **My Home**. Alternatively, you can use the Operations – Event File Import and Transform adapter.

Types of work distribution supported in VCT work queues

There are three types of work distribution supported for VCT work queues:

- **Operational Hours**: Arrivals for each day are distributed evenly over the hours of operation of the organization.
- **No Pattern**: Arrivals are converted to volumes as is, at the times they actually occur, without any distribution pattern. This pattern can be used if you want volumes to follow the true arrival pattern, and if arrivals are frequent during the organizational hours.
- **Even Distribution Hr**: Arrivals for each day are distributed based on defined specifications.

Related topics

Define a VCT work queue, page 35

VCT arrival patterns, page 40

Define a VCT work queue

After creating a work queue, you can define it as a VCT work queue. A VCT work queue is used in Operations environments. It has work volumes associated with it, and it also captures employee productivity on a finer Intraday granularity.

Before you begin

Create a process work queue, page 25 or Create a normal work queue, page 20

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **VCT Configuration**.
2. From the left pane, select the organization for which you want to create the queue.
3. From the lower right corner, select **Edit work queue**.
4. On the **Work Queue Configuration** screen, complete the fields.
5. Do one of the following:
   - If you want the work volume from the work queue to flow to a target queue, select **Add** on the right side of the screen. To define this process for the target queue, complete the fields.
   - If you do *not* want to configure any target work queues (meaning the work queue is the end of the chain), proceed to step 6.
6. Select **Save**.

   The work queue is now defined as a VCT work queue and updated on the **Queues** page.

Related topics

VCT work queue configuration, page 36
VCT AHT history and current settings, page 38

VCT work queue configuration

When creating or editing a VCT work queue, define or update data about the work queue.

Setting	Description
As of	Specifies the date from which to view or set the Activity Handling Time (AHT) for the work queue.
Use Volume Capture	Specifies the work queue as a VCT work queue. Once this check box is selected, the system displays the remaining fields for defining the work queue as a VCT work queue.
Type	Specifies the type of VCT work queue: • **Work Completed, WIP and Inventory**: Work queue in which all event types are enabled (**Arrivals**, **Check-in**, and **Check-out**). • **Work Completed and Inventory**: Work queue in which only the **Arrivals** and **Check-in** events are enabled. A **Check-out** event of equivalent value is automatically generated for each **Check-in** event, so there is no **Work in Progress (WIP)** event; only **Work Completed**. • **Work Completed**: Work queue in which only the **Check-in** event is enabled, which in turn generates an **Arrivals** event and a **Check-out** event of equivalent values.
Shown on Work Page	Indicates whether you can distinguish a manual entry VCT queue from an automated queue, without requiring the creation of suborganizations to hide the automated VCT queues. If you select this check box, the queue is displayed on the **Work** page under **My Volumes** in the **My Home** module.
Activity Handling Time (in seconds)	Specifies the Activity Handling Time (AHT) in seconds for the work queue. To enter effective dates for the AHT, select the icon to the right of the field.

Setting	Description
Arrival Pattern	Specifies the type of arrival pattern: • **Operational Hours**: Arrivals for each day are distributed evenly over the hours of operation of the organization. • **No pattern**: Arrivals are converted to volumes as is, at the times they actually occur, without any distribution pattern. This pattern can be used if you want volumes to follow the true arrival pattern, and if arrivals are frequent during the organizational hours. • **Even Distribution Hr**: Arrivals for each day are distributed based on defined specifications.
LQF Only	Determines whether the work queue is available for VCT or VCT data imports. If this check box is selected, the work queue is *not* available for VCT or VCT data imports.
Complete the following fields if you want the work volume from the work queue to flow to a target queue:	
Add	Allows you to add a target queue to which the work volume from the defined work queue flows into.
Multi Selection	Allows you to select multiple target queues.
Source Event	Specifies the type of event from the source queue that causes the work item to flow from the source work queue to the target work queue. Typically, the source event is **Check-in**.
Target Event	Specifies the type of event where the target queue receives the work coming from the source queue. This event could be one of the following: • **Arrivals**: If the target work queue type is **Work Completed, WIP and Inventory** or **Work Completed and Inventory** • **Check-in**: If the target work queue type is **Work Completed**. **Arrivals** is implied with this type of work queue.
Target Work Queue(s)	Specifies the work queue into which the work volume from the source queue flows into.

Setting	Description
Proportion Type	Specifies how to calculate the work that flows from one queue to another: • **Fixed Allocation**: Fixed percentage of work • **Forecast History Period**: Percentage of work is calculated based on the historical forecast • **Relative Period**: Percentage of work is calculated based on a relative period
Period (Weeks)	Specifies the number of weeks the system considers when calculating the work flow from one queue to another.
Proportion (Pct)	Specifies the proportion of work that flows from the source work queue to the target work queue.
Bundle Size	Optional: Specifies the required number of items sent in a bundle from the source queue to the target queue. Items from the source queue are *not* sent to employees working on the target queue until the required bundle size is reached.
Lag (Hrs)	Optional: Specifies the number of hours of lag time between bundles sent from the source queue to the target queue.
Lag (Mins)	Optional: Specifies the number of minutes of lag time between bundles sent from the source queue to the target queue.

Lag times between bundles

The **Lag (Hrs)** and **Lag (Mins)** fields allow adding a delay in creating the forecast for target queues in a linked queue forecasting chain. If there is a delay in processing that is not modeled by an activity, it can be modeled through a bundle lag.

Example: Lag between bundles

Queue A produces 10 units of work at 9:00 AM. It is chained 100% to Queue B. Without a bundle lag time, the 10 units of work would immediately be pushed to Queue B as an arrival. However, with a bundle lag time of two hours, it becomes an arrival for Queue B at 11:00 AM, not 9:00 AM.

Related topics

VCT AHT history and current settings, page 38

Define a VCT work queue, page 35

VCT AHT history and current settings

To edit details related to the current AHT setting for the VCT work queue, select the **Edit** icon next to the **Activity Handling Time (in seconds)** field.

The top portion shows the history of AHT for the work queue, according to time periods. On the bottom, you can edit the AHT setting for a new period.

Field	Description
From	Defines the date from which the AHT setting was assigned to the VCT work queue in the past.
To	Defines the date until which the AHT setting was assigned to the VCT work queue in the past.
Activity Handling Time (in seconds)	Defines the AHT setting for the VCT work queue for the defined time period in the past.
Effective Dates	Defines the dates that the AHT setting is now being assigned to the VCT work queue: • **Update value for current period <date range>**: This selection is the default, and replaces the displayed value for the time period that is currently saved. This setting has the same effect as having *no* effective dates and always resets the current value. • **Insert value for period from <date range>**: Allows you to set the new value from the beginning of the period being viewed into the future to a specified date. • **Insert value from <date> forward**: Allows you to set the new value from the beginning of the viewed period into the future, with no specified end date.
Activity Handling Time (in seconds)	Defines the current AHT setting, which indicates the target amount of time the work in the VCT work queue is performed and completed.

Related topics

VCT work queue configuration, page 36

Define a VCT work queue, page 35

Delete VCT work queue

If required, you can delete a VCT work queue for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Queues**, select **VCT Configuration**.

2 From the left pane, select the organization for which you want to delete the VCT work queue.

3 From the **Queues** screen, select the VCT work queue you want to delete and select **Delete work queue**.

4 To confirm the deletion, select **OK**.

Related topics

Define a VCT work queue, page 35

VCT arrival patterns

After defining VCT work queues, you can view and edit VCT arrival patterns. Arrival patterns are close representations of the distribution of the Intraday work to be done.

You can also configure the Operations - Arrival Processing adapter to use an arrival pattern to convert Arrival VCT events into volumes. The adapter applies the arrival pattern to the sum of arrivals over a defined time frame.

You can import a new pattern, or create one manually. You can select an existing pattern and change the settings.

Related topics

Import a VCT arrival pattern, page 40

Create a VCT arrival pattern, page 41

Edit a VCT arrival pattern, page 42

Delete a VCT arrival pattern, page 42

Related information

Operations adapters (*Workforce Management Operations Adapter Guide*)

Import a VCT arrival pattern

Import one or multiple VCT arrival patterns into the WFO system.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **VCT Arrival Patterns**.
2. Select **Import**.
3. Complete the fields on the **File Setup** screen.

   Two fields specific to arrival patterns include:

   - **Alignment Date**: Specifies the starting day of the week of the arrival pattern. It is recommended that you select a date in history before or coinciding with the oldest import date.
   - **Duration (in days)**: Specifies the number of days for which the VCT arrival pattern applies.
4. Select **Save**.

Related topics

File setup screen for imports and exports, page 147

Create a VCT arrival pattern, page 41

Edit a VCT arrival pattern, page 42

Create a VCT arrival pattern

You can create a VCT arrival pattern, which is a close representation of the distribution of the Intraday work to be done.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **VCT Arrival Patterns**.
2. Select **Create**.
3. On the **Create Arrival Patterns** screen, complete the fields.
4. To set the percentage of the work to be done over the duration of the arrival pattern, select **Save**.
   Text fields appear for every 15-minute interval for each day in the arrival pattern.
5. Set a percentage value for any 15-minute interval, which sets the distribution percentage of work for the arrival pattern.
6. Select **Save** again.
   The VCT arrival pattern is saved and updated on the Arrival Patterns screen.

Related topics

VCT arrival patterns settings, page 41
Import a VCT arrival pattern, page 40
Edit a VCT arrival pattern, page 42

VCT arrival patterns settings

When creating or editing a VCT arrival pattern, define or update data about the arrival pattern.

Setting	Description
Name	Defines the name of the VCT arrival pattern.
Description	Optional: Describes the VCT arrival pattern.
Alignment Date	Specifies the starting day of the week of the arrival pattern. It is recommended that you select a date in history before or coinciding with the oldest import date.
Duration (in Days)	Specifies the number of days for which the VCT arrival pattern applies.
Default frequency of import	Specifies the frequency with which you run the Operations - Data Management adapter. You can set it to a specific number of hours, days, or weeks. Typically, the Operations - Data Management adapter is run at the end of the day. In this case, this parameter is set to one day. If you run the adapter every three hours, set it to three hours.

Setting	Description
Daily Pattern	Defines the quarter-hour distribution percentage of the VCT arrival pattern. When you select **Save**, text fields appear for every 15-minute interval for each day in the arrival pattern. Set a percentage value for any 15-minute interval, which sets the distribution percentage of the arrival pattern.

Related topics

Import a VCT arrival pattern, page 40
Create a VCT arrival pattern, page 41
Edit a VCT arrival pattern, page 42

Edit a VCT arrival pattern

You can change the definition of a VCT arrival pattern.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **VCT Arrival Patterns**.
2. On the **Arrival Patterns** screen, select the arrival pattern you want to edit.
3. Select **Edit**.
4. On the **Edit Arrival Patterns** screen, edit the fields you want.
5. Select **Save**.
   The updated details of the VCT arrival pattern appear on the **Arrival Patterns** screen.

Related topics

VCT arrival patterns settings, page 41
Import a VCT arrival pattern, page 40
Create a VCT arrival pattern, page 41

Delete a VCT arrival pattern

If required, you can delete a VCT arrival pattern.

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **VCT Arrival Patterns**.
2. From the **Arrival Patterns** screen, select the arrival pattern you want to delete and select **Delete**.
3. To confirm the deletion, select **OK**.

Related topics

Import a VCT arrival pattern, page 40
Create a VCT arrival pattern, page 41

Edit a VCT arrival pattern, page 42

Activities

Create activities, which are the core components of both schedules and time records. When an employee performs any kind of work, activities specify the scheduled work and capture employee adherence to their schedule.

Topics

Workflow: Set up activities

Create activities, which are the core components of both schedules and time records. When an employee performs any kind of work, activities specify the scheduled work and capture employee adherence to their schedule.

Some activities are only visible in the schedule (such as **Vacation**). Some are only visible in the time records (such as **ACD Hold Time**). Other activities are visible in both the schedule and time records (such as **Break**).

Workflow

1 Create an activity type, page 46

Create an *activity type* for an organization. Activity types group similar activities not covered by the predefined activity types. Activity types make it easier for employees to log into activities in the My Time module.

2 Create an activity, page 50

Create an *activity* for an organization, which represents things an employee can do. Activities specify the *scheduled* work and the *actual* work done by employees.

3 Select to map activities to alternate activities, page 65

Select alternate activities that are considered in adherence when an employee is scheduled for a particular activity.

Related topics

Mapping of activities to reason codes and data sources, page 67

Create an activity type

Create a new *activity type* for each organization, which groups similar activities not covered by the predefined activity types.

Activity types make it easier for employees using the My Time module.

Before you begin

Determine whether you need to create a new activity type - see Predefined activity types, page 46.

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Activity Types**.
2. From the left pane, select the organization for which you want to create a new activity type.
3. Select **Create Activity Type**.
4. On the **Activity Type Details** screen, complete the fields and select **Save**.

What to do next

Create an activity, page 50

Related topics

Activity type details, page 47
Edit an activity type, page 49
Delete an activity type, page 49

Predefined activity types

When you create an *activity*, you need to select the *activity type*. You can select from *predefined* activity types, or *new* activity types that you define.

If the predefined activity types suit the requirements of your organization, you do *not* need to create more activity types.

Predefined Activity Type	Description	Examples
Absence Activities	Activities that define when employees are not at work.	• Vacation • Jury duty • Sick
Assigned Work Activities	Activities that define the work employees are doing.	• Phone • Email • Research
Desktop Monitoring	Activities that involve the use of software.	• eLearning

Predefined Activity Type	Description	Examples
Learning Activities	Activities related to scheduling and tracking in-house learning, such as Learning Break.	• Learning Break
Planned Events	Activities that are planned during work.	• Training • Staff meetings
Shift Events	Activities that occur during a shift.	• Lunch • Coffee break

Related topics

Create an activity type, page 46

Activity type details

When creating or editing an activity type, define or update data about the activity type.

Field	Description
Owner Organization	Defines the organization to which the activity type is assigned. Once assigned, the organization *cannot* be changed.
Name	Defines the name of the activity type.
Description	Optional: Describes the activity type.
Visible in My Time	Specifies whether this activity type is visible to the user viewing My Time. The selection of this parameter depends on whether you want employees to log into these activities through the My Time module. For example, the activity type, **Assigned Work Activities**, contains the **Phone** and the **Email** activities. This activity type is not selected as **Visible in My Time**. Employees are expected to log into these activities through the My Time module. **Absence Activities** contain the **Sick** and **Jury Duty** activities. This activity type is *not* selected as **Visible in My Time**, as employees are not expected to log into the Sick activity. Rather, managers create records containing the Sick activity when an employee calls in sick.
Time Off With Accrual	Enables time-off accrual for all activities created under this activity type. This setting is applicable to time off activities only.

Field	Description
Schedule of Accrual	Determines the period at which hours are accrued for the activity (Daily, Weekly, Semi-Monthly, Monthly, Yearly). If the Accrual Schedule is set to **Monthly**, hours are accrued at the start of each month, based on the specified accrual day of the month.
Accrual Policy	Determines the calculation of accrued time-off hours until the next accrual schedule. The policy can be set for an activity type or individual activity. Possible values are: • **Allot all hours on start date**: All time-off hours are allotted to the employee immediately. This option is the default when you create an activity or activity type. • **Allot prorated hours on start date**: The number of time-off hours allotted to the employee is based on the remaining months in the accrual schedule (from the employee start date). • **Earn all hours on next accrual schedule**: No time-off hours are allotted to the employee on the start date. The employee accrues these hours at the start of the next accrual schedule. • **Earn prorated hours on next accrual schedule**: No time-off hours are allotted to the employee on the start date. The employee accrues time-off hours based on the number of months they have worked at the start of the next accrual schedule.

Related topics

Create an activity type, page 46

Edit an activity type, page 49

Example: Accrual policy for an employee, page 48

Example: Accrual policy for an employee

The accrual policy includes the calculation of accrued time-off hours until the next accrual schedule. The policy can be set for an activity type or individual activity.

Example: Calculating accrual for an employee

An employee joins the company on March 1, 2018.

Their accrual schedule is 12 hours per year, accrued on January 1.

The accrued hours until the next accrual schedule are based on the following selections:

- **Allot all hours on start date**: All 12 time-off hours are allotted to the employee immediately, even though the employee was not employed at the organization on Jan 1, 2018. 12 hours are accrued on Jan 1, 2019.

- **Allot prorated hours on start date**: Nine hours are allotted to the employee based on the fact that nine months are left until the next accrual schedule, which is Jan 1, 2019. 12 hours are accrued on Jan 1, 2019.
- **Earn all hours on next accrual schedule**: No hours are allotted on the start date. The employee accrues 12 hours on Jan 1, 2019.
- **Earn prorated hours on next accrual schedule**: No hours are allotted on the start date. The employee accrues nine hours on Jan 1, 2019, having worked for nine months at the time of accrual. (You can set the accrual rate for each employee individually from the **Profiles** page of the **User Management** module.).

Related topics

Activity type details, page 47

Edit an activity type

Edit an activity type for an organization.

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Activity Types**.
2. From the left pane, select the organization for which you want to edit a new activity type.
3. From the right pane, select an activity where the **Owner Organization** is the *same* as the organization you selected on the left.
4. Select the activity type you want to edit, and select **Edit Activity Type**.
5. On the **Activity Type Details** screen, edit the relevant fields and select **Save**.

Related topics

Activity type details, page 47

Create an activity type, page 46

Delete an activity type, page 49

Delete an activity type

If required, you can delete an activity type for an organization.

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Activity Types**.
2. From the left pane, select the organization for which you want to delete a new activity type.
3. Select the activity type you want to delete, and select **Delete Activity Type**.
4. To confirm the deletion, select **OK**.

Related topics

Create an activity type, page 46

Edit an activity type, page 49

Create an activity

Create an activity, which is the basic building block of WFM. Activities specify the *scheduled* work and the *actual* work done by employees.

Before you begin

- Create an activity type, page 46
- Determine whether you need to create a new activity - see Predefined activities, page 51

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Activities**.
2. From the left pane, select the organization for which you want to create a new activity.
3. Select **Create Activity**.
4. On the **Activity Details** screen, complete the fields and select **Save**.

What to do next

Select to map activities to alternate activities, page 65

Related topics

Activity details, page 54

Edit an activity, page 60

Copy an activity, page 60

Delete an activity, page 61

Predefined activities

You can create new activities, or use the predefined activities that are pre-configured in the WFM application.

Predefined Activity	Description	Can Be Deleted
Blended	Work activity associated with responding to customer requests using different types of media, at different levels of immediacy. This activity is assigned with all types of media (**Social Post**, **Face-to-Face**, **Phone Outbound**, **Callback**, **Fax**, **Email**, **Chat**, **Voice-Over-IP**, **Phone**). The employee assigned this activity only uses the skills assigned to them with media matching the activity assigned to them for the specified time range.	Yes
Break	Shift event intended to be used for breaks. This activity can be renamed or deleted.	Yes
CKA	Closed Key Activity used during a time when ACDs required employees to *close the key* when leaving for activities, such as break, lunch, or meeting.	Yes
Coaching	Activity used by default by the Coaching module when creating Coaching sessions. The Coaching activity cannot be deleted or renamed, but can be used as a Calendar event outside the Coaching module.	No
Deferred	Work activity associated with resolving customer requests not immediately, but in a more delayed fashion. This activity is assigned with **Email** and **Fax** media. The media assigned to this activity have a Service Level Agreement (SLA) that is often longer than the shift.	Yes
General Absence	Placeholder time-off event, intended to be used by schedulers when the specific type of absence activity that needs to be used is unknown.	Yes

Predefined Activity	Description	Can Be Deleted
Generic Non-Work Activity	Activity used with the Adherence module to designate non-working activities.	No
Generic Work Activity	Activity used with the Adherence module to designate working activities.	No
Idle	Activity intended to be used with Time Collector Mapping to map to the **Idle** reason code (if reported).	Yes
Immediate	Work activity associated with responding to customer requests shortly after they are received. This activity is assigned with **Phone** and **Chat** (if applicable) media.	Yes
Learning	Activity used by the eLearning module to schedule calendar events for Learning Assignments. This activity *cannot* be renamed or deleted.	No
Learning Break	Activity used by the eLearning module to schedule a break in a Learning activity. Learning Break is used as a tracking mechanism by the eLearning module. This activity *cannot* be renamed or deleted, and it is not scheduled. Learning Break is used automatically by the system, so you do *not* need to map it in Time Collector or Adherence Mapping.	No
Learning End	Activity used by the eLearning module to schedule the end of a Learning activity. Learning End is used as a tracking mechanism by the eLearning module. This activity *cannot* be renamed or deleted, and it is not scheduled. Learning End is used automatically by the system, so you do *not* need to map it in Time Collector or Adherence Mapping.	No

Predefined Activity	Description	Can Be Deleted
No Activity	Activity used as an internal classification used to indicate the time interval between shifts. **No Activity** indicates that not being logged in is an acceptable and adherent state for the employee. This activity is needed for contact centers where employees log off for certain activities (for example, **Break** or **Meetings**). It can also be used for time-off events where employees do not log on (for example, for **Vacation** and **Sick** activities).	No
None	Activity used by Operations when scheduling in a queue hopping environment. This activity indicates that the employee is scheduled to work on an activity not tied to a work queue.	Yes
Outbound	Activity used for outbound scheduling.	No
Records Merge Activity	Activity used to retain continuity in Adherence where employees log off, rather than use **AUX** or **Not Ready**. For example, employees log off for **Break**. You can map **Records Merge Activity** to **Break** in Adherence Mapping. The software then merges the adherence record for the time period they are logged out. To encourage appropriate **AUX** / **Not Ready** behavior, if the employee uses **AUX** or **Not Ready** to log off, do not map **Records Merge Activity** to **Break**.	No
Shift / Overtime Gap	Default activity used by the Forecasting and Scheduling module to place unscheduled, unpaid time between typical shifts and overtime shifts for employees. This activity is automatically added when overtime is added from the Calendar, and when requested from Time Off Manager.	No
Sick	Time off event intended to be used for **Sick** or **UPTO** (Unplanned Paid Time Off). This activity can be renamed or deleted.	Yes

Predefined Activity	Description	Can Be Deleted
Unknown Activity	Activity for which an employee was logged in, but a predefined amount of time has passed, and no further information about the employee has been received. This activity is for clients who have active feeds into the Adherence module, rather than files deposited at intervals to be picked up. This activity informs the client that the feed is either down, or it has not been reported for a specified time period. Within the employee record, it can be replaced with what the employee was actually doing during that time period.	No
Vacation	Time off event intended to be used for **Vacation** or **PTO** (Paid Time Off). This activity can be renamed or deleted.	Yes

Related topics

Create an activity, page 50

Edit an activity, page 60

Activity details

When creating or editing an activity, define or update data about the activity.

Activity Details

Field	Description
Owner Organization	Defines the organization to which the activity is assigned.
Name	Defines the name of the activity.
Description	Optional: Describes the activity.
Activity Type	Specifies the type of activity. Includes predefined and created activity types.

Field	Description
Paid	Indicates whether the activity is paid. If an activity is marked as paid, any time an employee logs into this activity, the resulting time entry is also marked as paid. A manager can override the paid/unpaid status of any time entry on the Day Details page.
Color	Defines the color representing the activity, which displays on schedules and on time records in Adherence.
Activity Code	Defines the code representing the activity, which displays on schedules and on time records in Adherence.
Time Off	Indicates whether this activity can be used for time-off events.
Media	Indicates the media to which the activity is mapped. Select from the **Available Media** list. Examples: Phone, Voice-over-IP, Chat, Email, Fax, Callback, and Social Post.
Work Queue Hopping	Indicates whether this activity can be used for queue hopping.
Work Queues	If Work Queue Hopping is selected, select from the **Available Work Queues** list.

Scheduling Usage

Field	Description
Use in Shift (Primary Activity)	Indicates whether the activity can be used in a shift.
Use in Shift Event	Indicates whether the activity can be used in a shift event. If **Use in Shift (Primary Activity)** is selected, the system automatically selects this field.
Use in Calendar Event	Indicates whether the activity can be used in a calendar event.
Unavailability	Indicates whether the activity can be used in an unavailability event.

Field	Description
Resource Constraint	Specifies the maximum number of employees who can be doing this activity at the same time. For example, part of a check processing operation requires checks to be scanned. There are only two scanning machines available. Only two employees are scheduled to perform the scanning activity at any given time.
Cell Group Size	Specifies a number by which the maximum number of employees doing this activity at the same time (defined by **Resource Constraint)** must be divisible. For example, one of the scheduled tasks in your production environment involves loading tables on pallets. It requires exactly four people to move a table onto the pallets. Set the **Cell Group Size** parameter to 4 to guide to schedule this activity in increments of four employees.
Can be Scheduled Within a Shift from Another Campaign	Indicates whether the activity can be scheduled within a shift from another campaign.

Request Management Usage

Field	Description
Used in Requests	Indicates whether the activity can be used in a request.
Deduct from Daily Pool	Indicates whether the activity can be deducted from a daily pool.
Deduct from Interval Pool	Indicates whether the activity can be deducted from an interval pool.

Display Multiple VTO Options	Indicates whether the following VTO options are displayed on the Create New Request form when this activity is selected as the Time Off Type:
	• **Full Day**: Requests the entire shift.
	• **Partial Day**: Requests a specific start time and length of time.
	• **Late Start**: Requests to come in as late as possible to start the shift.
	• **Early Off**: Requests to leave as early as possible to end the shift.
	• **Anytime Off**: Requests not to work at any time during the shift.
	Users can select any combination of these options for the selected day. However, only one option can be approved.
	This option is available when:
	• The **Name** field has a value
	• **Activity Type** is **Absence Activities**
	• The following checkboxes are selected:
	  • Activity Details > **Time Off**
	  • Request Management Usage > **Used in Requests**
	  • Request Management Usage > **Deduct from Interval Pool**
	Note: When selected, a subset of the Time Off Validation rules is processed for the VTO options.

Flex Time	Indicates whether the activity can be used for flex time requests.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Applies to Required Pay Period Hours</td><td>Indicates whether this activity is deducted from the Required Pay Period Hours balance, which is set in User Management, Employees, Work Rules.
This option is available when:
The Name field has a value
Activity Type is Absence Activities
The following check boxes are selected:
From Activity Details, select Time Off
From Request Management Usage, select Used in Requests</td></tr>
<tr><td>Time Off With Accrual</td><td>Indicates if the time-off activity has been specified as having an allotted number of hours per week or per month for the owner organization.</td></tr>
<tr><td>Schedule of Accrual</td><td>Defines the period at which hours are accrued for the activity (Daily, Weekly, Semi-Monthly, Monthly, Yearly).
If the Accrual Schedule is set to Monthly, hours are accrued at the start of each month, based on the specified accrual day of the month.</td></tr>
<tr><td>Accrual Policy</td><td>Affects the calculation of accrued time-off hours until the next accrual schedule. The policy can be set for an activity type or individual activity.
Possible values are:
Allot all hours on start date: All time-off hours are allotted to the employee immediately. This option is the default when you create an activity or activity type.
Allot prorated hours on start date: The number of time-off hours allotted to the employee is based on the remaining months in the accrual schedule (from the employee start date).
Earn all hours on next accrual schedule: No time-off hours are allotted to the employee on the start date. The employee accrues these hours at the start of the next accrual schedule.
Earn prorated hours on next accrual schedule: No time-off hours are allotted to the employee on the start date. The employee accrues time-off hours based on the number of months they have worked at the start of the next accrual schedule.</td></tr>
</table>

Activity Manager Usage

Field	Description
Adherence Tolerance Minutes	Specifies the number of minutes an employee can be out of adherence in the scheduled activity before an exception is created. For example, the Phone activity is assigned a tolerance of 5 minutes. An employee is scheduled to log on to the Phone activity at 9:00 a.m. They log on at 9:05 a.m. Therefore, they were not adhering for 5 minutes and the tolerance is 5 minutes, so no adherence exception is displayed. However, if the employee logged on at 9:10 a.m., the full 10 minutes from 9:00 a.m. to 9:10 a.m. would show up as an exception. This **Out of adherence** exception displays on the Adherence page. The exception creates an **Out of adherence** alert for that scheduled activity (if an applicable alert rule has been defined and enabled).
Maximum Time in Activity	Indicates the maximum amount of time an employee can remain in the recorded actual activity before a **Too long in activity** exception is created. The **Too long in activity** exception displays on the Quickview page. The values include: • **Unlimited**: An employee can remain in the recorded actual activity for an unlimited amount of time. (No **Too long in activity** exception is created.) • **Minutes**: An employee can remain in the recorded actual activity for the maximum number of minutes specified by this field. If this time is exceeded, a **Too long in activity** exception is created.
Who is in State	Specifies the state that the activity represents for the **Who Is In** display (**In** or **Out**).

Scorecards Usage

Field	Description
Scorecards Source Measure	Specifies the source measure in Scorecards to which the activity is mapped. This field is only displayed if you are licensed for Scorecards. A source measure reflects a type of measurement used to evaluate the performance of a person or organization. To make analyzing activity data more practical and meaningful for Scorecards, activities are mapped to a smaller group of source measures.

Related topics

Create an activity, page 50

Edit an activity, page 60

Activity type details, page 47

Related information

Work queue hopping (*Workforce Management Forecasting and Scheduling Guide*)

Edit an activity

Edit an activity for an organization.

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Activities**.
2. From the left pane, select the organization for which you want to edit an activity.
3. From the right pane, select an activity where the **Owner Organization** is the *same* as the organization you selected on the left.
4. Select **Edit Activity**.
5. On the **Activity Details** screen, edit the relevant fields and select **Save**.

Related topics

Activity details, page 54

Create an activity, page 50

Copy an activity, page 60

Delete an activity, page 61

Copy an activity

Copy an activity from one organization to another.

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Activities**.
2. From the left pane, select the organization for which you want to copy an activity.
3. From the right pane, select an activity where the **Owner Organization** is the *same* as the organization you selected on the left.
4. Select **Copy Activity**.
5. On the **Copy Activity** screen, select the organization to which you want to copy the activity, and select **Copy to Selected Organization**.
6. Select **Done**.

Related topics

Create an activity, page 50

[Edit an activity](), page 60
[Delete an activity](), page 61

Delete an activity

If required, you can delete an activity for an organization.

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Activities**.
2. From the left pane, select the organization for which you want to delete an activity.
3. From the right pane, select an activity where the **Owner Organization** is the *same* as the organization you selected on the left.
4. Select **Delete Activity**.
5. To confirm the deletion, select **OK**.

Related topics

Create an activity, page 50
Edit an activity, page 60
Copy an activity, page 60

Customize a special activity for an organization

For a specific organization under the root organization, you can override up to two attributes for most special activities. For **Vacation**, you can override the entire activity with a different one.

> In an MT SaaS environment, tenants *cannot* modify their own special activities. The service provider can modify tenant-specific special activities, where available. Global special activities are defined at the top-level organization and are viewable by all tenants.

Purpose of special activities

A *special activity* is a default, system-defined activity that has a special meaning in the system. Defined at the root organization level, all organizations under root inherit special activities. To customize a special activity for a specific organization, you can change the values of specified attributes for that organization.

Special activity overrides do *not* affect the *siblings* of the organization. These activity settings apply to the organization and its child organizations *only*.

Before you begin

Verify that the **Special Activity Overrides** license is enabled. (Go to **System Management**. Under **Licensing Management**, select **System Licensing**.)

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Special Activities**.
2. From the left pane, select the a child organization of root for which you want to customize special activities.

   You *cannot* override special activities at the root organization level.
3. Determine the special activities for which you want to override attribute values:
   - For all special activities *except for Vacation*, you can override up to two attribute settings, **Adherence Tolerance Minutes** and **Maximum Time in Activity**.
   - For **Vacation** only, replace it with a different time-off activity created for the selected organization, or the inherited Vacation activity defined for the parent organization. When you replace Vacation with a different activity, all Vacation properties are overridden with the values defined for the selected time-off activity.
4. Select **Save**.

   All overrides also apply to all child organizations of the selected organization.

Related topics

Special activity override details, page 63

Activity details, page 54

Related information

Workforce Management SaaS considerations (*Workforce Optimization Multi-tenant SaaS Service Provider Reference Guide*)

Special activity override details

You can override up to two specific attributes for most special activities for a selected child organization under the root organization. The attributes depend on the special activity. For Vacation, you can override the entire activity with a different one.

The two attributes, **Adherence Tolerance Minutes** and **Maximum Time in Activity**, are two of the attributes you can define for regular activities in the system.

Special Activity	Attributes You Can Override
Vacation	You can replace the Vacation activity with a different time-off activity created for the organization, or with the inherited Vacation activity defined for the parent organization. When you select another time-off activity for Vacation, all Vacation attribute values are overridden with the values defined for the selected time-off activity. The overrides also apply to all child organizations. **NOTE**: The only inherited activity available is the Vacation activity defined for the parent organization. *Any other time-off activities listed are only defined at the currently selected organization*. You cannot use time-off activities defined for a parent organization unless it is designated as the Vacation activity.
No Activity	Adherence Tolerance Minutes
Unknown Activity	Maximum Time in Activity
Shift/Overtime Gap	• Adherence Tolerance Minutes • Maximum Time in Activity
Voluntary Time Off	• Adherence Tolerance Minutes • Maximum Time in Activity
Learning Break	• Adherence Tolerance Minutes • Maximum Time in Activity
Coaching	• Adherence Tolerance Minutes • Maximum Time in Activity

Related topics

Activity details, page 54

Customize a special activity for an organization, page 62

Example: Override attributes for special activities, page 64

Example: Override attributes for special activities

Overriding specific attribute settings for certain special activities is useful for call center service providers.

For example, one of the attribute settings you can override is **Adherence Tolerance Minutes**. This setting specifies the number of minutes an employee can be out of adherence in the scheduled activity before an exception is created.

Note the following scenario:

- There is a parent company, Central.
- Central has two child organizations: West Coast and East Coast.
- For Central, the value for **Adherence Tolerance Minutes** is set to five minutes for the Coaching activity.
- An employee is supposed to log into a Coaching activity at 2:00 and instead logs in at 2:10.
- An **Out of adherence exception** and alert is created for the Coaching activity.
- For the West Coast child organization, set this value for Coaching to 10 minutes, while maintaining the 5-minute limit for the East coast child organization.
- An employee belonging to the West Coast organization is supposed to log into a Coaching activity at 2:00 and instead logs in at 2:10.
- No exception or alert is generated. The system still considers them to be in adherence with the scheduled activity.
- The West coast organization has two child organizations: Rocky Mountains and Sierra Nevada.
- Both the Rocky Mountains and Sierra Nevada inherit the 10-minute value for this attribute from the West Coast organization.

Related topics

Special activity override details, page 63

Customize a special activity for an organization, page 62

Activity details, page 54

Workflow: Map activities for adherence

Adherence monitors how well scheduled activities of employees match their real-time activities. Using Adherence, your organization can determine if efficiencies can be gained through process changes, policy changes, or performance coaching.

Example: Adherence mapping

An employee is scheduled for the activity, **Phone**, during office hours. The data collected from the ACD is more granular and includes several states, such as **Talk**, **Hold**, **Wrap** and **Available**.

Use adherence mapping to indicate that if the employee is scheduled for **Phone**, any of the actual states from the ACD do *not* generate an adherence exception.

The activity, **No Activity**, is an internal classification used to indicate the time interval between shifts, and is ignored in adherence calculations. You can map **No Activity** to scheduled activities, such as **Vacation**, **Sick**, or **Training**. For these activities, the user is *not* expected to be logged into the system.

Workflow

1 Select to map activities to alternate activities, page 65

Select to map activities to alternate activities for adherence. An employee is considered to be in adherence when performing that activity or any of the mapped activities.

2 Map alternate activities for adherence, page 66

Map alternate activities for a selected activity.

Select to map activities to alternate activities

Select to map activities to alternate activities for adherence. An employee is considered to be in adherence when performing that activity or any of the mapped activities.

Before you begin

Create an activity, page 50

Procedure

1 Go to **Work Administration**. Under **Activities**, select **Adherence Mapping**.

2 From the left pane, select the owner organization of the activity for which you want to map alternate activities.

For example, you want to map alternate activities for **Answer Calls**. The organization listed in the **Owner Organization** for **Answer Calls** is **West Coast**. Select **West Coast** from the left pane.

3 Select the activity for which you want to map alternate activities for adherence, and select **Edit Adherence Mapping**.

You can now map alternate activities for the selected activity.

What to do next

Map alternate activities for adherence, page 66

Related topics

Workflow: Map activities for adherence, page 65

Map alternate activities for adherence

Map alternate activities for a selected activity. An employee is considered to be in adherence when performing that activity or any of the mapped activities.

Before you begin

Select to map activities to alternate activities, page 65

Procedure

1 From **Available Activities**, highlight the activity you want to map to the scheduled activity, and select **Assign right**.

The activity now appears under **Adhering Actual Activities**.

2 Repeat step 1 for all activities you want to map to the scheduled activity.

The new mapped activities appear under **Adhering Actual Activities** for the **Scheduled Activity**.

3 Optional: To remove an activity from the mapping, do the following:

a. From **Adhering Actual Activities**, highlight the activity you want to remove from the mapping.

b. Select **Assign left**.

The activity now appears under **Available Activities**.

4 Select **Save**.

The updated mapped activities appear under **Adhering Actual Activities** for the **Scheduled Activity**.

Related topics

Workflow: Map activities for adherence, page 65

Mapping of activities to reason codes and data sources

Adherence monitors how well the *scheduled* activities of employees match their *actual* or real-time activities. This analysis allows you to determine if your organization can be more efficient through process changes, policy changes, or performance coaching.

The Time Collector component receives *reason codes* from defined *data sources*, which indicates the *actual* activity employees are performing. Time Collector links the reason code with a WFM activity, based on defined Time Collector mappings in the system. This mapping is then used by the Adherence module to check if employees are *in adherence*.

Managing activity mapping for adherence

You can:

- Create and upload a text file that contains the mapping of reason codes to activities
- View the data sources and reason codes mapped to WFM activities for organizations (Time Collector mappings)
- Edit or remove the mapping of a reason code to an activity

Related topics

View Time Collector Mappings, page 70
Workflow: Upload Time Collector Mappings, page 67
Edit the mapping of a reason code to an activity, page 71
Remove the mapping of a reason code to an activity, page 72
Monitoring adherence from data sources, page 72

Workflow: Upload Time Collector Mappings

To ease the process of mapping the reason code of a data source with the activities of an organization, upload the mappings from a text file.

Create the text file, which contains the mapping of reason codes to activities. When you upload the file, complete various parameters, which define the format of the text file.

Workflow

1. Create text file of Time Collector Mappings, page 68

   Create a text file that contains the mapping of reason codes to activities. The file is a comma-separated text file. It can have any file name extension, such as .txt or .csv.

2. Upload Time Collector Mappings, page 68

   Upload Time Collector Mappings, which are contained in a predefined text file. In addition, complete parameters defining the file.

Related topics

Time Collector Mappings fields, page 69

Mapping of activities to reason codes and data sources, page 67

Create text file of Time Collector Mappings

Create a text file that contains the mapping of reason codes to activities. The file is a comma-separated text file. It can have any file name extension, such as .txt or .csv.

After creating the file, you select it when uploading the mappings to WFM.

Procedure

1 Create a text file with a .txt or .csv extension.

2 Create a header line in the file, which is identified by the # character at the beginning of the line.

For example: **#ReasonCode_Name_ActivityName**

3 Type the mapping of the reason codes to activity names in the following syntax:

<Reason Code Name>, <Activity Name>

For example:

Logon, Immediate

Not-Ready, Inactive

4 Save the text file locally. When you upload the mappings, you are prompted to browse to the file.

What to do next

Upload Time Collector Mappings, page 68

Related topics

Mapping of activities to reason codes and data sources, page 67

Upload Time Collector Mappings

Upload Time Collector Mappings, which are contained in a predefined text file. In addition, complete parameters defining the file.

Before you begin

Create text file of Time Collector Mappings, page 68

Procedure

1 Go to **Work Administration**. Under **Activities**, select **Time Collector Mapping**.

2 Select **Upload From File**.

3 Complete the fields on the **Upload Time Collector Mappings** screen, and select **Upload**.

Related topics

Time Collector Mappings fields, page 69

Mapping of activities to reason codes and data sources, page 67

Time Collector Mappings fields

When you upload Time Collector Mappings from a text file, complete more parameters defining the file.

Field	Description
File Setup	
File	Specifies the text file that contains the Time Collector Mappings you want to upload.
Delimiter	Specifies the column delimiter within the text file: • Comma • Semicolon • Tab The delimiter determines the character that separates the columns in the file.
Prefix for comment lines	Specifies one or more characters that indicate comment lines in the text file. For example: *This reason code is not used by all ACDs.
Data Source	Read-only field that specifies the data source of the reason codes.
Field Name	
Reason Code Name	Provides the text descriptions of event mode or event reason pairs that are sent by the data source as a record of employee states. Reason codes represent the *actual* activity an employee is performing at any given time.
Activity Name	Defines the WFM activity that is mapped to the reason code for tracking whether the employee is in adherence.
Column Number	
Reason Code Name	Specifies the column number for the Reason Code Name values. For example: 1
Activity Name	Specifies the column number for the Activity Name values. For example: 2

Related topics

Upload Time Collector Mappings, page 68

Create text file of Time Collector Mappings, page 68

View Time Collector Mappings

You can view Time Collector Mappings for each activity of an organization. Time Collector Mappings link reason codes sent from data sources to Workforce Management activities.

Procedure

1 Go to: **Work Administration**. Under **Activities**, select **Time Collector Mapping**.

2 From the left pane, select the organization for which you want to view Time Collector Mappings.

3 On the Time Collector Mappings screen, view the following:

- **Data Source**: Name of the data source that sends the reason code to the Time Collector module in WFM.
- **Reason Code**: Text description of the event mode or event reason pairs sent by the data source as a record of employee states.
- **Activity**: WFM activity to which the reason code is mapped by the Time Collector.
- **Owner Organization**: Name of the organization that owns the Time Collector Mapping.

Where a mapping exists, all columns have values. Dashed lines indicate either an unmapped activity or reason code. For example, if the **Activity** column has dashes, the reason code is not mapped to an activity. If the **Reason Code** column has dashes, the activity is not mapped to a reason code.

4 To view additional information about a data source, highlight the data source and select **Data Source** .

The Data Source Selector screen displays a **Description**, **Time Zone** and **Type** of the data source.

If you are using data sources scoped by organization, the Data Source Selector is limited to data sources associated with the selected organization and its ancestors, and data sources of types not configured with a data source.

5 To view additional information about a reason code, highlight the data source with the reason code and select **View Reason Codes**.

The system goes to **Integration Management**, **Data Sources**, and **Reason Codes** to display detailed information about the reason code.

Related topics

Mapping of activities to reason codes and data sources, page 67

Workflow: Upload Time Collector Mappings, page 67

Edit the mapping of a reason code to an activity, page 71

Remove the mapping of a reason code to an activity, page 72

Related information

Data sources and reason codes (*Workforce Optimization System Administration Guide*)

Edit the mapping of a reason code to an activity

You can edit the mapping of a reason code of a data source to an activity.

Procedure

1 Go to **Work Administration**. Under **Activities**, select **Time Collector Mapping**.

2 From the left pane, select the organization for which the mapping is defined (**Owner Organization**). Alternatively, select a child of the organization for which the mapping is defined.

If you select a *child* of the **Owner Organization**, the mapping is saved for the child organization and its own child organizations (and not for the **Owner Organization**). To change the mapping for the **Owner Organization** and all of its child organizations, select it from the left pane.

3 From the **Time Collector Mappings** screen, select the data source for which you want to edit the mapping of its reason code to an activity.

4 Select **Edit Time Collector Mapping**.

5 From the **Time Collector Mapping Details** screen, select the new activity to which you want to map the selected reason code.

6 Select **Save**.

The selected activity is now mapped to the reason code.

Related topics

Mapping of activities to reason codes and data sources, page 67
Edit the mapping of a reason code to an activity, page 71
Workflow: Upload Time Collector Mappings, page 67
Remove the mapping of a reason code to an activity, page 72

Time Collector Mapping Details screen

You can map an activity to a data source and a reason code.

Field	Description
Data Source	Read-only field that specifies the name of the data source that sends the reason code to the Time Collector module in WFM.
Reason Code	Read-only field that specifies the text descriptions of event mode or event reason pairs that are sent by the data source as a record of employee states. Reason codes represent the *actual* activity an employee is performing at any given time.
Organization Name	Read-only field that specifies the organization that owns the Time Collector Mapping.
Activity	Specifies the WFM activity to which the reason code is mapped by the Time Collector.

Related topics

Edit the mapping of a reason code to an activity, page 71
Mapping of activities to reason codes and data sources, page 67
Time Collector Mapping Details screen, page 71
Workflow: Upload Time Collector Mappings, page 67
Remove the mapping of a reason code to an activity, page 72

Remove the mapping of a reason code to an activity

You can remove the mapping of a reason code of a data source to an activity.

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Time Collector Mapping**.
2. From the left pane, select the organization for which the mapping is defined (**Owner Organization**).
3. From the **Time Collector Mappings** screen, select the data source for which you want to remove the mapping of its reason code to an activity.
4. Select **Unmap Time Collector Mapping**.
5. To remove the mapping of the activity to the reason code, select **OK**.

   The selected activity is no longer mapped to the reason code.

Related topics

Mapping of activities to reason codes and data sources, page 67
Remove the mapping of a reason code to an activity, page 72
Workflow: Upload Time Collector Mappings, page 67
Edit the mapping of a reason code to an activity, page 71

Monitoring adherence from data sources

The process of monitoring adherence starts when an employee logs into the system and a data source captures their state or activity. This state is then translated into a reason code, which represents the actual activity as it is represented in the WFM application.

Monitoring adherence from data sources

One main way to monitor adherence is from data sources connected to an Automated Call Distributor (or ACD):

1. Employees log on to the system from their phone and indicate their actual state or activity that they are doing.
2. An Automated Call Distributor (or ACD) captures the state.
3. The data source on the ACD translates the state into a reason code, which represents the actual activity the employees is performing.
4. The data source sends the reason code to the Time Collector component in WFM.

5 The Time Collector links the reason code with a WFM activity, based on defined Time Collector Mappings defined in the system.

6 This mapping is used by the Adherence module to check if employees are *in adherence*. Alternatively, it checks if the actual activities they are performing matches their scheduled activities.

To enable this adherence monitoring, define the Time Collector Mappings in the Work Administration module in WFM.

Example: Monitoring adherence from data sources

1 Employee #9345 logs in by phone and changes their state to one indicating they are working on the phone.

2 The corresponding data source on the ACD translates this activity into the **OnP** reason code, and sends this code to the Workforce Management application.

3 The Time Collector Mapping links the OnP reason code sent from the data source to the WFM activity, **Phone**.

4 The Adherence mapping checks to see if the **Phone** activity is mapped to the scheduled activity, **Answer Calls**.

5 After performing the **Phone** activity for the scheduled amount of time, employee #9345 logs in and changes their phone state to the **After Call Work** activity.

6 The corresponding data source translates this activity into the **ACW** reason code, and sends this code to the Workforce Management application.

7 The Time Collector Mapping links the ACW reason code sent from the data source to the WFM activity, **After Call Work**.

8 The Adherence mapping checks to see if the **After Call Work** activity is mapped to the scheduled activity, **Answer Calls**.

If **Phone** and **After Call Work** are mapped as alternate activities for **Answer Calls**, the employee is considered to be *in adherence*. If these activities are *not* mapped to **Answer Calls**, the employee is considered to be *out of adherence*.

> To monitor employee adherence for *non-phone* employees, employees need to log their activities using the **My Time** module in **My Home**. This method is a different way of monitoring adherence, and is *not* defined by the Time Collector Mapping module.

Related topics

View Time Collector Mappings, page 70

Workflow: Upload Time Collector Mappings, page 67

Edit the mapping of a reason code to an activity, page 71

Remove the mapping of a reason code to an activity, page 72

Related information

My Time module (*Workforce Management Employee Guide*)

Work rules

Define work rules and patterns that reflect both the needs of your organizations and your individual employees. Then, assign work rules to employees. These rules determine how employees are scheduled.

Topics

Anatomy of a shift and a work pattern

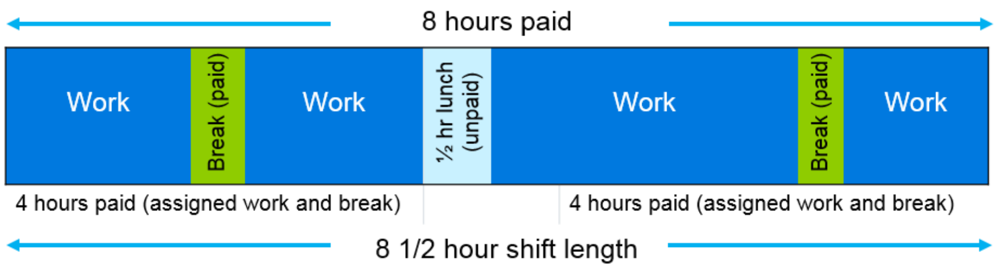
A *shift* is a work period of a definite length. A *work pattern* is a set of shifts.

Anatomy of a shift

Each shift type has:

- Length (such as 8 1/2 hours, nine hours)
- Start time or range of start times
- Linked shift events (such as breaks and meals)

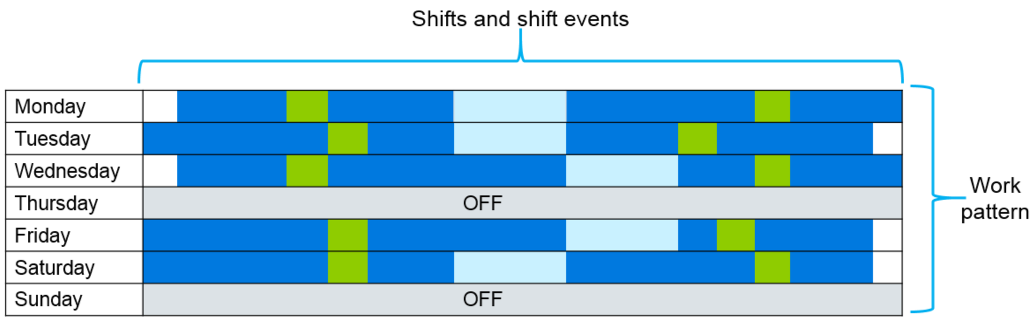
You can create as many types of shifts as needed. Each shift can have as many shift events as necessary. The total shift length includes both paid and unpaid time.

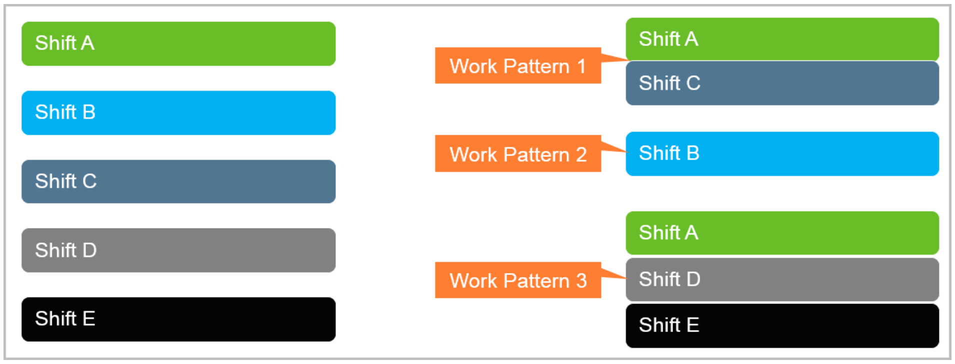


Anatomy of a work pattern

A work pattern is a set of shifts (usually a weekly set of shifts). A work pattern typically includes one or more shifts and possible days off for one week.

At least one work pattern must be assigned to an employee in order for the scheduling engine to schedule the employee. *Work patterns are assigned to employees, not individual shifts*.





Related topics

Workflow: Set up work rules, page 77

Workflow: Set up work rules

Define work rules and patterns that reflect both the needs of your organizations and your individual employees. Employees are assigned work patterns that combine various shift lengths, start and stop times, shift events and specific rules. The scheduling engine uses these work patterns to generate schedules.

Workflow

1 Create a shift event, page 78

Create a *shift event*, which is a time period when employees are scheduled for specific activities, other than the main shift activity. Shift events can be either productive or unproductive. For example, **Phone** and **Email** can be both a shift and a shift event. **Breaks** and **Lunches** can *only* be shift events. You can use each shift event in many different shifts.

2 Create a shift, page 86

Create a *shift*, which is an interval of time for which an employee is scheduled to perform work. Shifts are associated with an activity, which defines the type of work that is to be performed during the shift (such as phone time or research). A shift can contain multiple *shift events*.

3 Create a VTO event, page 93 and Create an OT extension, page 96

To adjust staffing, use Overtime (OT) extensions and Voluntary Time Off (VTO) events in your scheduling plans. OT extensions can be added *before* or *after* a shift to *extend* employee work time. VTO events can be added at the *beginning* or *end* of an employee shift to *reduce* employee work time.

4 Create a work pattern, page 101

Create a *work pattern*, which is a set of shifts. A work pattern includes one or more shifts and possible days off for one week. The scheduling engine can only schedule employees who have *at least one work pattern* assigned to them. Only work patterns, not individual shifts, are assigned to employees.

5 Create a rotation, page 110

To assign employees a specific repeating sequence of work patterns, use *rotations*. Rotations *override* work patterns. When rotations are assigned, work patterns that were previously assigned are ignored.

6 Create an assignment rule, page 113

For work environments that have complex work rules, rotations, or fairness needs due to employee or union requirements, create *assignment rules*. Assignment rules *supplement* work patterns. Employees must be assigned at least one work pattern or rotation *before* applying assignment rules for that employee.

7 Create a project work rule, page 120

Create a *project rule*, which defines the length of time and time period in which you want employees to perform a project activity. Use project work rules when you have flexibility about *when* the work is done and *who* does the work.

8 Create a time bank, page 125

Create a *time bank*, which allows employees to work longer hours during busy times and fewer hours during slower times. Employees bank hours when they work more than usual, and subtract hours when they work less than usual.

9 Workflow: Assign work rules to employees, page 135

After defining work rules in the system, assign the relevant work rules and work-related parameters to employees. These rules and parameters determine how an employee is scheduled.

Create a shift event

Create a *shift event*, which is a time period when employees are scheduled for specific activities, other than the main shift activity. Shift events can be either productive or unproductive. For example, **Phone** and **Email** can be both a shift and a shift event. **Breaks** and **Lunches** can *only* be shift events. You can use each shift event in many different shifts.

Shift event usage and policies

For call centers, shift events are off-phone time periods. For back-office operations, shift events are non-production time periods.

Some organizations dictate specific times during which employees take breaks and lunch. Other organizations do *not* want to specify these events. Regardless of company policy, you can still create shifts that include employee downtime. Employee downtime affects the calculation of productive time. It is reflected in the Productivity report.

Procedure

1. To create a shift event on an organizational level for *all* campaigns, go to **Work Administration**. Under **Work Rules**, select **Shift Events**.

   If you want to *override* the organizational settings and create a shift event exception for a *specific scheduling period only*, go to **Forecasting and Scheduling**. Under **Work Rules**, select **Shift Events**.
2. From the **Work Administration** module, from the left pane, select the *organization* for which you want to create a shift event.

   When creating an exception for a scheduling period, from the **Forecasting and Scheduling** module, select the *campaign* and *scheduling period* for which you want to create a shift event.
3. Select **Create**.
4. On the **Shift Events** screen, complete the fields.
5. Note the following:
   - If you select **Paid**, you can then select for the shift event to be **Flexible**.
   - If you select **Flexible**, the schedule can include zero or more blocks of the shift event within any shift to which the shift event is linked. The **Minimum Count** and **Maximum Count** fields define this setting.
   - In addition, if you select **Flexible**, you can link more activities to the shift event.
6. To link more activities to the shift event:
   a. Select **Flexible** for the shift event.
   a. From **Additional Activities**, select **Add**.
   b. From **Activities**, select the other activities to which you want to associate the shift event, and select **Add Selected Activities**.
   c. To remove any activities from the shift event, select **Remove**.
7. When you have completed all fields on the **Shift Events** screen, select **Save**.

What to do next

Create a shift, page 86

Related topics

Shift event details, page 79

Related information

Set up campaign-specific work rules (*Workforce Management Forecasting and Scheduling Guide*)

Shift event details

When creating or editing a shift event, define or update data about the shift event.

Field	Description
Organization	When creating shift events from the **Work Administration** module, this is a read-only field that displays the *organization* for which the shift event is created (the selected organization). NOTE: This field *only* appears when creating shift events from the **Work Administration** module, under **Work Rules**.
Campaign	When creating shift event exceptions from the **Forecasting and Scheduling** module, this is a read-only field that displays the *campaign* for which the shift event is created. NOTE: This field *only* appears when creating shift events from the **Forecasting and Scheduling** module, under **Work Rules**.
Name	Defines the name of the shift event. For example: *1-hour lunch; 1/2 hour research; first break* Do *not* use a comma as part of the shift event name, as linked shift events are separated by commas. For this reason, you *cannot* use a comma as an import delimiter for shifts or shift events.
Description	Optional: Describes the shift event. For example: *Paid lunch break that lasts a total of 1 hour.*
Activity	Defines the associated activity for the shift event. Activities are not associated with a length of time or a start time. Each shift event is associated with an activity (for activities defined as **Use in Shift Event**). Shift events are *containers* for activities. Shift events associate the activity with a length of time and a start time at which you want employees to perform that activity. For example: The shift events called *20-minute morning break* and *15-minute afternoon break* can both be associated with the activity called *break*.

Field	Description
Length	Defines the duration of the shift event. You can use the up and down arrows to set the length, or you can type the length directly into the **Length** field.
Paid	Indicates whether the shift event is paid or not. For example, a lunch or break could be paid or unpaid, depending on the policies of the organization. If you select **Paid**, you can select **Flexible**. Only paid shift events are flexible to avoid having a differing number of paid hours per shift. For example, specify that a four-hour shift can have between zero and one thirty-minute blocks of unpaid break time. Note: • If *zero* blocks of unpaid break time are scheduled, the shift would include four paid hours. • If *one* block of unpaid break time is scheduled, the same type of shift could have three and a half paid hours. • If the shift event is unpaid (**Paid** is *not* selected), the **Flexible** option is *not* available.
Flexible	Allows you to define the following for the shift event: • Zero or more blocks of the shift event within any shift to which the shift event is linked. • Multiple activity types for the shift event When this option is selected: • Define the *minimum* number of times the shift event can occur during a shift (**Minimum Count**). • Define the *maximum* number of times the shift even can occur during a shift (**Maximum Count**). It is not a strict rule. Rather, it guides the scheduling engine toward generating an optimal schedule. The blocks of the shift event can be next to each other, or they can be separate blocks of time. • You can add **Additional Activities**. Select activities (other than the activity selected in the **Activity** field) to which you want to associate the shift event.
Minimum Count	Specifies that the flexible shift event can occur *at least* this number of times during the shift. The value for this field can be zero (0).
Maximum Count	Specifies that this shift event can be repeated *at most* this number of times during the shift.

Field	Description
Start Time Type	Determines the start time of the shift event during a shift: • **Any Time**: Start time can occur any time during the shift. If you select this option, the **Earliest Start** and **Latest Start** fields are unavailable (as they are *not* relevant). • **Absolute**: Start time can occur according to the actual clock times defined in the **Earliest Start** and **Latest Start** fields. For example, the **Earliest Start** is set to 2:00 and the **Latest Start** is set to 3:00. It means that this shift event could start between 2:00 and 3:00 o'clock. • **Relative to Shift Start**: Start time of this shift event can occur according to a timed offset from the start of the shift. The offset is defined in the **Earliest Start** and **Latest Start** fields. For example, the **Earliest Start** is set to 2:00 and the **Latest Start** is set to 3:00. It means that this shift event could start between two and three hours from the start of the shift.
Earliest Start	Defines one of the following: • If **Start Time Type** is **Absolute**, the start time can occur *from* this defined clock time. • If **Start Time Type** is **Relative to Shift Start**, the start time can occur *from* the offset from the start of the shift. For example, **Start Time Type** is set to **Absolute**. The **Earliest Start** is set to 9:00. It means that the shift event can start from 9:00 o'clock during the shift. For example, the **Start Time Type** is **Relative to Shift Start**. The **Earliest Start** is set to 3:00. It means that the shift event can start from 3 hours after the start of the shift.
Latest Start	Defines one of the following: • If the **Start Time Type** is **Absolute**, the start time can occur *until* this defined clock time. • If the **Start Time Type** is **Relative to Shift Start**, the start time can occur *at a maximum from* the offset from the start of the shift. For example, **Start Time Type** is set to **Absolute**. The **Latest Start** is set to 11:00. It means that the shift event can start *until* 11:00 o'clock during the shift. For example, the **Start Time Type** is **Relative to Shift Start**. The **Latest Start** is set to 5:00. It means that the shift event can start *at a maximum of* five hours after the start of the shift.

Field	Description
Additional Activities (Enabled if shift event is flexible)	Specifies other activities to which you want to associate the shift event, if **Flexible** is selected. For example, for the *Customer Service* shift event, add the *Email*, *Chat*, and *Clerical* activities. The scheduling engine calculates the optimum number of blocks of time for each of the activities, and places them in schedules.

The more time you allow between the start and end times of a shift event, the more optimization choices the scheduling engine has.

Related topics

Create a shift event, page 78

Example: Create flexible shift events

Flexible shift events allow you to define multiple activity types for the shift event. They also allow placing the shift event a minimum and maximum number of times during a shift.

Example: Create a flexible shift event with a minimum and maximum count

You want to create a shift event where employees receive customers at a front desk. Each employee has at least one hour of this activity during a shift, and a maximum of four hours.

1. Create a **Flexible** shift event called **Customer Service**.
2. Set the **Length** of this shift event to 1:00 (one hour).
3. Set the **Minimum Count** to **1** and the **Maximum Count** to **4**.
4. Based on these settings, the scheduling engine:
   - Places between one and four one-hour blocks of the **Customer Service** shift event in any shifts to which the **Customer Service** shift event is linked.
   - Determines the best *number* and the best *placement* of these shift events in the schedule.

     These shift events can be next to each other. For example, one shift event is scheduled from 10:00-11:00 am, and another shift event is scheduled immediately afterward, from 11:00-noon.

     Alternatively, the shift events are placed in different blocks in the schedule. For example, one shift event is scheduled from 10:00-11:00 am, and another shift event is scheduled from 2:00-3:00 pm.

Example: Create a flexible shift event for an optional activity

You want to create a shift event for optional employee training, only if it does *not* affect your service level.

1. Create a **Flexible** shift event called **Optional training**.
2. Set the **Length** of this shift event to 1:00 (one hour).
3. Set the **Minimum Count** to **0** and the **Maximum Count** to **1**.

The **Minimum Count** of zero allows the scheduling engine to treat the event as an optional activity. It only schedules the one-hour training session during a shift if the training does *not* affect the service level.

Related topics

Shift event details, page 79

Edit a shift event

Edit a shift event for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Shift Events**.

2 From the left pane, select the organization for which the shift event was created.

Select the same organization displayed in the **Organization** column for the shift event to edit it. Otherwise, the **Edit** option is *not* available.

3 From the **Shift Events** screen, select the shift event you want to edit, and select **Edit**.

4 On the **Shift Events** screen, edit any relevant fields and select **Save**.

Related topics

Shift event details, page 79

Cleaning up skills, work rules, and queues, page 169

Copy a shift event

Copy a shift event for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Shift Events**.

2 From the left pane, select the organization from which you want to copy the shift event.

3 From the **Shift Events** screen, select the shift event you want to copy and select **Copy**.

The shift event is copied on the **Shift Events** screen with the name: **Copy of <name of shift event> 1**.

4 To rename the copied shift event for the selected organization:

a. Select the shift event and select **Edit**.

b. In the **Name** field, edit the name and select **Save**.

Example: Copy shift event

1 You copy the shift event, **1/2 hour Research**, for the **Operations** organization.

2 The name of the copied shift event is **Copy of 1/2 hour Research 1**.

3 Select **Copy of 1/2 hour Research 1** and select **Edit**.

4 Rename the shift event to: **1/2 hour Research 2**.

Related topics

Shift event details, page 79

Export shift events

Export all shift events from the WFO system to an external file.

If you want to store data on your hard drive, or want to make multiple updates using a data file, you can export shift event data. Once you make your updates, import them back into the system.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Shift Events**.
2. Select the organization from which you want to export shift events.
3. Select **Export**.
4. On the **File Setup** screen in the **Delimiter** field, select one of the following as the field delimiter (separator) used in the file:
   - Tab
   - Semicolon
5. Select **Export**, and then **Done**.

   The system exports the data to the file, **ShiftEvents.txt**.
6. At the prompt, open or save the export file.

Related topics

File setup screen for imports and exports, page 147

Import shift events, page 84

Import shift events

Import one or multiple shift events into the WFO system.

After you have exported your data and made the required updates in an external location, you can import the updated data back into the system.

Before you begin

Export shift events, page 84

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Shift Events**.
2. Select the organization for which you want to import shift events.
3. Select **Import**.
4. Complete the fields on the **File Setup** screen.
5. Select one of the following:
   - **Import**: Imports the data as specified on the **File Setup** screen.
   - **Select All**: Imports all data in the file, regardless of what is specified on the **File Setup** screen.

The system imports the data accordingly. It is populated as specified on the **Shift Events** screen.

Related topics

File setup screen for imports and exports, page 147

Create a shift

Create a *shift*, which is an interval of time for which an employee is scheduled to perform work.

Shifts are associated with an activity. This activity defines the type of work performed during the shift (such as phone time or research). A shift can contain multiple *shift events*. Shift events represent other activities that occur during the shift (such as breaks or meals).

You can create shifts at any level of the organization hierarchy, but they can *only* be modified in the organization for which they were created.

Shifts versus shift assignments

Shifts are templates for shift assignments. A *shift assignment* occurs when the scheduling engine assigns a shift to an employee during the scheduling process.

Before you begin

Create a shift event, page 78

Procedure

1. To create a shift on an organizational level for *all* campaigns, go to **Work Administration**. Under **Work Rules**, select **Shifts**.

   If you want to *override* the organizational settings and create a shift exception for a *specific scheduling period only*, go to **Forecasting and Scheduling**. Under **Work Rules**, select **Shifts**.

2. From the **Work Administration** module, from the left pane, select the *organization* for which you want to create a shift.

   When creating an exception for a scheduling period, from the **Forecasting and Scheduling** module, select the *campaign* and *scheduling period* for which you want to create a shift.

3. Select **Create**.
4. Complete the fields on the **Shifts** screen.
5. For **Start Times**, select the cell in the grid that represents the start time of the shift you want:
   - To select a *single* start time for the shift, select the one cell representing that single start time in the grid.
   - To select a range of *multiple* start times for the shift, select the cells that represent those start times in the grid.

     Shift start times are defined in 15-minute increments *only*.

> Setting a range of start times gives the scheduling engine more flexibility in creating an optimal schedule that matches your service level and employee availability.

6. To add shift events to the shift:
   a. Expand **Shift Events**.
   b. Select **Add**.
   c. From **Available Shift Events**, select the shift events you want to add to the shift.
   d. Select **Add Selected Shift Events**.

   The selected shift events are added to the shift.

7 When you have completed all fields on the **Shift** screen, select **Save**.

The new shift appears on the **Shifts** page in collapsed view. To expand the view to display the defined shift events, from the **Shift** column, select the arrow next to the shift name.

What to do next

Create a VTO event, page 93, Create an OT extension, page 96, or Create a work pattern, page 101

Related topics

Shift details, page 87

Related information

Set up campaign-specific work rules (*Workforce Management Forecasting and Scheduling Guide*)

Shift details

When creating or editing a shift, define or update data about the shift.

Field	Description
Organization	When creating shifts from the **Work Administration** module, this is a read-only field that displays the *organization* for which the shift is created (the selected organization). NOTE: This field *only* appears when creating shifts from the **Work Administration** module, under **Work Rules**.
Campaign	When creating shift exceptions from the **Forecasting and Scheduling** module, this is a read-only field that displays the *campaign* for which the shift is created. NOTE: This field *only* appears when creating shifts from the **Forecasting and Scheduling** module, under **Work Rules**.
Name	Defines the name of the shift. For example: *9 hr, 1-hr lunch*; *8.5 hr, 1/2 hr lunch*; *Research shift, 1-hr lunch*
Description	Optional: Describes the shift. For example: *Research shift with no customer service work and 1-hour lunch*.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Activity</td><td>Defines the associated activity for the shift.
Each shift is associated with an activity (for activities defined as Use in Shift Event). Shifts are containers for activities. Shifts define a length of time and a time period in which you want employees to perform an activity.
For example: You want to create a shift that is focused on immediate customer service. Therefore, create a shift named 9 hr, 1-hr lunch. Associate the shift with the predefined activity, Immediate, which is a work activity associated with responding to customer requests shortly after they are received.</td></tr>
<tr><td>Duration</td><td>Defines the duration of the shift in the time format, HH:MM.
You can use the up and down arrows to set the duration, or you can type it directly into the Duration field.</td></tr>
<tr><td>Start Times</td><td>Specifies the possible start times of the shift in 15-minute increments:
Single start time: You can create each shift with one distinct start time. For example, one shift starts at 8:00 AM, and a different shift starts at 8:30 AM. If there are any changes to the shift, such as adding another shift event, update each shift individually.
Multiple start times: You can create each shift with multiple start times. For example, one shift can start at 8:00 AM, 8:15 AM, 8:30 AM, 8:45 AM, and 9:00 AM. If there are any changes to the shift, such as adding another shift event, you only need to update one shift.</td></tr>
<tr><td>Minimum Spacing</td><td>Defines the minimum amount of time between shift events or between a shift event and the beginning or end of a shift.</td></tr>
<tr><td>Maximum Spacing</td><td>Defines the maximum amount of time between shift events or between a shift event and the beginning or end of a shift.
Unlimited indicates that there is no maximum amount of time between shift events, or between a shift event and the beginning or end of a shift.</td></tr>
<tr><td>Shift Events</td><td>Allows you to add shift events to the shift.</td></tr>
</table>

Related topics

Create a shift, page 86

Edit a shift, page 90

Example: Define start times for shifts, page 89

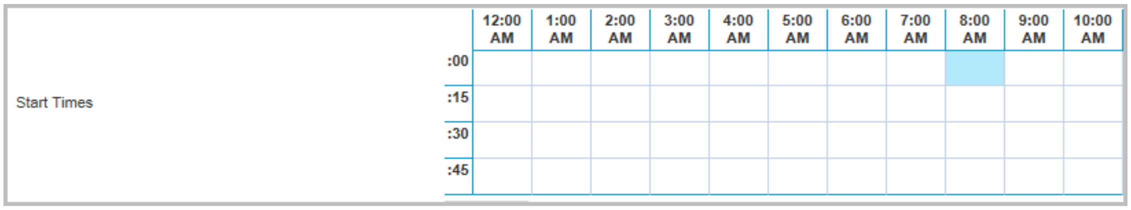
Example: Define minimum and maximum spacing for shifts, page 90

Example: Define start times for shifts

When you create a shift, you have flexibility in defining the start times of a shift.

Example: Select a single start time for a shift

You want to define a single start time of 8:00 AM for this shift. Therefore, select the 8:00 AM block in the grid.

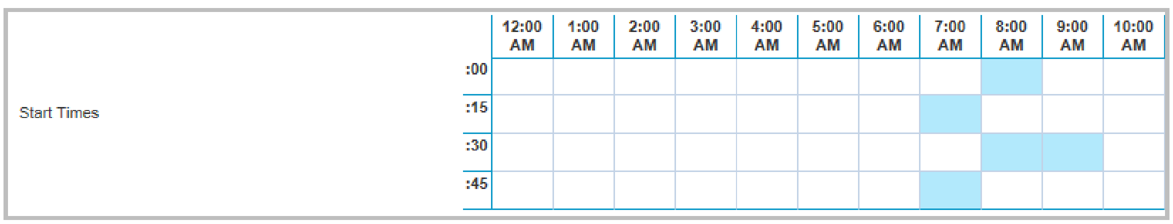


Example: Select a range of multiple start times for a shift

You want to define a range to start times that include the following possible times:

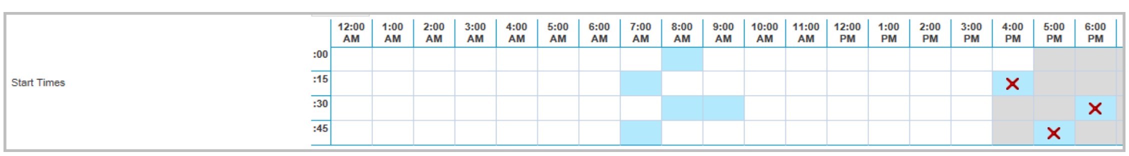
- 7:15 AM
- 7:45 AM
- 8:00 AM
- 8:30 AM
- 9:30 AM

Therefore, select each one of those blocks in the grid.



Example: Select invalid start times for a shift

If you select a time outside the hours of operation, a red X appears. The red X indicates that the selection is invalid. To unselect it and select alternate start times in the grid, select the cell again.



Related topics

[Create a shift](), page 86

[Shift details](), page 87

[Example: Define minimum and maximum spacing for shifts](), page 90

Example: Define minimum and maximum spacing for shifts

When you create a shift, you can define the minimum and maximum amount of time between shift events during a shift.

Example: Define minimum spacing

Morning break can start anytime from 10:30 AM to 11:30 AM. Lunch can start anytime from 11:45 AM to 1:00 PM.

Use the **Minimum Spacing** setting to ensure that an employee does not get the *latest* possible morning break (11:30 AM) and the *earliest* possible lunch (11:45 AM).

To ensure that there is *at least* an hour and a half between break and lunch, enter 01:30 in the **Minimum Spacing** field.

> In addition to using the **Minimum Spacing** setting, it is a best practice to ensure that no conflicts exist between breaks and lunches by verifying the **Start** and **End** time parameters.

Example: Define maximum spacing

Lunch can start anytime from 11:30-12:30 PM. Afternoon break can start anytime from 2:00-3:30 PM.

Use the **Maximum Spacing** setting to ensure that an employee does not get the *earliest* possible lunch (11:30 PM), and the *latest* possible afternoon break (3:30 PM).

To ensure that there is *at the most* three hours between lunch and afternoon break, enter 03:00 in the **Maximum Spacing** field.

Related topics

Create a shift, page 86

Shift details, page 87

Example: Define start times for shifts, page 89

Edit a shift

Edit a shift for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Shifts**.
2. From the left pane, select the organization for which the shift was created.

   Select the same organization displayed in the **Organization** column for the shift to edit it. Otherwise, the **Edit** option is *not* available.
3. From the **Shifts** screen, select the shift you want to edit, and select **Edit**.
4. On the **Shifts** screen, edit any relevant fields and select **Save**.

Related topics

Shift details, page 87

Cleaning up skills, work rules, and queues, page 169

Copy a shift

Copy a shift for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Shifts**.
2. From the left pane, select the organization from which you want to copy the shift.
3. From the **Shifts** screen, select the shift you want to copy and select **Copy**.
   The shift is copied on the **Shifts** screen with the name: **Copy of <name of shift> 1**.
4. To rename the copied shift for the selected organization:
   a. Select the shift and select **Edit**.
   b. In the **Name** field, edit the name and select **Save**.

Example: Copy shift

1. You copy the shift, **9 hr, 1-hr lunch**, for the **Customer Care** organization.
2. The name of the copied shift is **Copy of 9 hr, 1-hr lunch 1**.
3. Select **Copy of 9 hr, 1-hr lunch 1**, and select **Edit**.
4. Rename the shift to: **9 hr, 1-hr lunch 2**.

Related topics

Shift details, page 87

Export shifts

Export all shifts from the WFO system to an external file.

If you want to store data on your hard drive, or want to make multiple updates using a data file, you can export shift data. Once you make your updates, import them back into the system.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Shifts**.
2. Select the organization from which you want to export shifts.
3. Select **Export**.
4. On the **File Setup** screen in the **Delimiter** field, select one of the following as the field delimiter (separator) used in the file:
   - Tab
   - Semicolon
5. Select **Export**, and then **Done**.
   The system exports the data to the file, **Shifts.txt**.
6. At the prompt, open or save the export file.

Related topics

File setup screen for imports and exports, page 147

Import shifts, page 92

Import shifts

Import one or multiple shifts into the WFO system.

After you have exported your data and made the required updates in an external location, you can import the updated data back into the system.

Before you begin

Export shifts, page 91

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Shifts**.
2. Select the organization for which you want to import shifts.
3. Select **Import**.
4. Complete the fields on the **File Setup** screen.
5. Select one of the following:
   - **Import**: Imports the data as specified on the **File Setup** screen.
   - **Select All**: Imports all data in the file, regardless of what is specified on the **File Setup** screen.

   The system imports the data accordingly. It is populated as specified on the **Shifts** screen.

Related topics

File setup screen for imports and exports, page 147

Managing overstaffing and understaffing

To adjust staffing to help you meet your service goals, use Overtime (OT) and Voluntary Time Off (VTO) in your scheduling plans.

OT extensions can be added *before* or *after* a shift to *extend* employee work time. VTO events can be added at the *beginning* or *end* of an employee shift to *reduce* employee work time.

Handing understaffing: schedule Overtime (OT)

To handle *understaffing*, extend the time employees work. Add an OT extension to the work pattern assigned to employees.

When scheduling OT, the scheduling engine assigns OT extensions *before* or *after* existing schedules of employees. You can specify a minimum and a maximum duration of gaps or breaks between the regular shift and the overtime. You can also add shift events, such as breaks, to OT extensions.

Handling overstaffing: schedule Voluntary Time Off (VTO)

To handle *overstaffing*, ask employees to take time off voluntarily. Define a VTO event to the work pattern assigned to employees.

Voluntary time off is typically used in call center environments that are *overstaffed*. Call centers reduce overhead by giving employees the option to leave early without pay. This same practice could be applicable to high volume processing operation units, for which employees are paid hourly.

When scheduling VTO, the scheduling engine assigns VTO events *on top of* existing schedules of employees. They are assigned at the beginning or end of scheduled shifts. You can specify a minimum and a maximum duration of VTO events.

Scheduling OT and VTO

OT extensions and VTO events *must* be linked to a work pattern for the scheduling engine to be able to schedule them. You can also manually add OT extensions or VTO events to the schedule.

For each employee, you can set OT and VTO limits. Managers can specify the minimum and maximum number of hours of overtime or voluntary time off assigned to an employee every day and every week.

Optionally, you can set employee preferences for OT and VTO. For example, an employee prefers to work overtime after their regular shift, but *not* before it. Another employee prefers to have VTO at the end of their shift, but *not* at the beginning. Provided they have the relevant privilege, employees can enter their own OT and VTO preferences through the WFO portal.

After you set up OT and VTO, you can generate a schedule, which assigns OT and VTO to employees.

Related topics

Create a VTO event, page 93

Create an OT extension, page 96

Create a VTO event

Create a *Voluntary Time Off (VTO)* event, which can be added at the *beginning* or *end* of an employee shift to *reduce* employee work time.

Create a VTO event for a specific organization, and add it to a work pattern.

Before you begin

Create a shift, page 86

Procedure

1 To create a VTO event on an organizational level for *all* campaigns, go to **Work Administration**. Under **Work Rules**, select **VTO Events**.

If you want to *override* the organizational settings and create a VTO event exception for a *specific scheduling period only*, go to **Forecasting and Scheduling**. Under **Work Rules**, select **VTO Events**.

2 From the **Work Administration** module, from the left pane, select the *organization* for which you want to create a VTO event.

When creating an exception for a scheduling period, from the **Forecasting and Scheduling** module, select the *campaign* and *scheduling period* for which you want to create a VTO event.

3 Select **Create**.

4 On the **VTO Events** screen, complete the fields to define the VTO event.

5 Select **Save**.

The new VTO event appears on the VTO Events page.

What to do next

Create an OT extension, page 96 or Create a work pattern, page 101

Related topics

VTO event details, page 94

Related information

Set up campaign-specific work rules (*Workforce Management Forecasting and Scheduling Guide*)

VTO event details

When creating or editing a VTO event, define or update data about the VTO event.

Field	Description
Organization	When creating VTO events from the **Work Administration** module, this is a read-only field that displays the organization for which the VTO event is created (the selected organization). NOTE: This field *only* appears when creating VTO events from the **Work Administration** module, under **Work Rules**.
Campaign	When creating VTO event exceptions from the **Forecasting and Scheduling** module, this is a read-only field that displays the *campaign* for which the VTO event is created. NOTE: This field *only* appears when creating VTO events from the **Forecasting and Scheduling** module, under **Work Rules**.

Field	Description
Name	Defines the name of the VTO event. For example: Short VTO, End of shift VTO
Description	Optional: Describes the VTO event. For example: *2-hr VTO at the beginning of a shift*.
Activity	Defines the name of the activity underlying the event, which is always set to the **Voluntary Time Off** activity. VTO events are non-work activities which reduce the work time in the regular shift of an employee. VTO is a special type of time-off activity. Like other types of time-off activities, it appears on top of the regular shift of the employee on the Calendar.
Minimum Duration	Defines the minimum duration for the VTO event (in HH:MM format).
Maximum Duration	Defines the maximum duration for the VTO event (in HH:MM format).

Related topics

Create a VTO event, page 93

Edit a VTO event, page 95

Edit a VTO event

Edit a Voluntary Time Off (VTO) event for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **VTO Events**.
2. From the left pane, select the organization for which the VTO event was created.

   Select the same organization displayed in the **Organization** column for the VTO event to edit it. Otherwise, the **Edit** option is *not* available.
3. From the **VTO Events** screen, select the VTO event you want to edit, and select **Edit**.
4. On the **VTO Events** screen, edit any relevant fields and select **Save**.

Related topics

VTO event details, page 94

Delete a VTO event, page 96

Copy a VTO event

Copy a Voluntary Time Off (VTO) event for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **VTO Events**.

2 From the left pane, select the organization from which you want to copy the VTO event.

3 From the **VTO Events** screen, select the VTO event you want to copy and select **Copy**.

The VTO event is copied on the **VTO Events** screen with the name: **Copy of <name of VTO event> 1**.

4 To rename the copied VTO event for the selected organization:

a. Select the VTO event and select **Edit**.

b. In the **Name** field, edit the name and select **Save**.

Example: Copy VTO event

1 You copy the VTO event, **2-hr VTO**, for the **Claims Setup** organization.

2 The name of the copied VTO event is **Copy of 2-hr VTO 1**.

3 Select **Copy of 2-hr VTO 1** and select **Edit**.

4 Rename the VTO event to: **2-hr VTO 2**.

Related topics

VTO event details, page 94

Delete a VTO event

If required, you can delete a Voluntary Time Off (VTO) event for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **VTO Events**.

2 From the left pane, select the organization for which you want to delete the VTO event.

3 From the **VTO Events** screen, select the VTO event you want to delete and select **Delete**.

4 To confirm the deletion, select **OK**.

Related topics

Create a VTO event, page 93

Create an OT extension

Create *Overtime (OT)* extensions, which are added *before* or *after* a shift to *extend* employee work time. In understaffing, OT extensions are added to extend the time employees work.

OT extensions have many attributes that are similar to shift assignments. These attributes include duration, activity, and linked shift events. You can create an OT event for a specific organization, and add it to a work pattern.

Before you begin

Create a shift, page 86

Procedure

1. To create an OT extension on an organizational level for *all* campaigns, go to **Work Administration**. Under **Work Rules**, select **OT Extensions**.

   If you want to *override* the organizational settings and create an OT extension exception for a *specific scheduling period only*, go to **Forecasting and Scheduling**. Under **Work Rules**, select **OT Extensions**.
2. From the **Work Administration** module, from the left pane, select the *organization* for which you want to create an OT extension.

   When creating an exception for a scheduling period, from the **Forecasting and Scheduling** module, select the *campaign* and *scheduling period* for which you want to create an OT extension.
3. Select **Create**.
4. On the **OT Extensions** screen, complete the fields to define the OT extension.
5. To add shift events to the OT extension (such as a break):
   a. Expand **Shift Events**.
   b. Select **Add**.
   c. From **Available Shift Events**, select the shift events you want to add to the OT extension.
   d. Select **Add Selected Shift Events**.

      The selected shift events are added to the OT extension.
6. Select **Save**.

   The new OT extension appears on the OT Extensions page.

What to do next

Create a work pattern, page 101

Related topics

OT extension details, page 98
Shift event details, page 79

Related information

Set up campaign-specific work rules (*Workforce Management Forecasting and Scheduling Guide*)

OT extension details

When creating or editing an OT extension, define or update data about the OT extension.

Field	Description
Organization	When creating OT extensions from the **Work Administration** module, this is a read-only field that displays the *organization* for which the OT extension is created (the selected organization). NOTE: This field *only* appears when creating OT extensions from the **Work Administration** module, under **Work Rules**.
Campaign	When creating OT extension exception from the **Forecasting and Scheduling** module, this is a read-only field that displays the *campaign* for which the OT extension is created. NOTE: This field *only* appears when creating OT extensions from the **Forecasting and Scheduling** module, under **Work Rules**.
Name	Defines the name of the OT extension. For example: *1.5-hr OT*, *4-hr OT with Break*
Description	Optional: Describes the OT extension. For example: *3-hour OT after the shift with a 15-minute break*.
Activity	Defines the name of the activity of the OT extension. The drop-down list includes activities defined for the selected organization.
Duration	Defines the length of the OT extension in the time format, HH:MM. You can use the up and down arrows to set the duration, or you can type it directly into the **Duration** field.
Minimum Gap	Defines the *minimum* allowable time between the end or beginning of a shift and the OT extension. For example, you want employees to have at least a 1/2 hour gap between the end of a shift and their overtime extension. Type **00:30** in the **Minimum Gap** field.
Maximum Gap	Defines the *maximum* allowable time between the end or beginning of a shift and the OT extension. For example, you do *not* want employees to have more than an hour gap between their overtime extension and the beginning of a shift. Type **01:00** in the **Maximum Gap** field.

Related topics

Create an OT extension, page 96

Edit an OT extension, page 99

Edit an OT extension

Edit an Overtime (OT) extension for each organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **OT Extensions**.

2 From the left pane, select the organization for which the OT extension was created.

Select the same organization displayed in the **Organization** column for the OT extension to edit it. Otherwise, the **Edit** option is *not* available.

3 From the **OT Extensions** screen, select the OT extension you want to edit, and select **Edit**.

4 On the **OT Extensions** screen, edit any relevant fields and select **Save**.

Related topics

OT extension details, page 98

Delete an OT extension, page 100

Copy an OT extension

Copy an Overtime (OT) extension for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **OT Extensions**.

2 From the left pane, select the organization from which you want to copy the OT extension.

3 From the **OT Extensions** screen, select the OT extension you want to copy and select **Copy**.

The OT extension is copied on the **OT Extensions** screen with the name: **Copy of <name of OT extension> 1**.

4 To rename the copied OT extension for the selected organization:

a. Select the OT extension and select **Edit**.

b. In the **Name** field, edit the name and select **Save**.

Example: Copy OT extension

1 You copy the OT extension, **4-hr OT with Break**, for the **Roswell** organization.

2 The name of the copied OT extension is **Copy of 4-hr OT with Break 1**.

3 Select **Copy of 4-hr OT with Break 1** and select **Edit**.

4 Rename the OT extension to: **4-hr OT with Break 2**.

Related topics

OT extension details, page 98

Delete an OT extension

If required, you can delete an Overtime (OT) extension for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **OT Extensions**.
2. From the left pane, select the organization for which you want to delete the OT extension.
3. From the **OT Extensions** screen, select the OT extension you want to delete and select **Delete**.
4. To confirm the deletion, select **OK**.

Related topics

Create an OT extension, page 96

Create a work pattern

Create a *work pattern*, which includes one or more shifts and possible days off for one week. The scheduling engine can only schedule employees who have *at least one weekly or monthly work pattern* assigned to them. Only work patterns, *not individual shifts*, are assigned to employees.

One or more work patterns can be assigned to an employee. However, the scheduling engine selects only *one* work pattern to use for the entire week. It does *not* switch from one work pattern to another during the same week.

Benefits of work patterns

Some typical uses of work patterns include:

- Allows an employee the flexibility to work two different types of shifts within one week
- Allows the scheduling engine to use the optimal combination of shifts and shift events in a schedule
- Controls the scheduling of weekday and weekend shifts
- Generates potential scheduling options

Before you begin

- Create a shift, page 86
- If required - Create a VTO event, page 93 and Create an OT extension, page 96

Procedure

1 To create a work pattern on an organizational level for *all* campaigns, go to **Work Administration**. Under **Work Rules**, select **Work Patterns**.

If you want to *override* the organizational settings and create a work pattern exception for a *specific scheduling period only*, go to **Forecasting and Scheduling**. Under **Work Rules**, select **Work Patterns**.

2 From the **Work Administration** module, from the left pane, select the *organization* for which you want to create a work pattern.

When creating an exception for a scheduling period, from the **Forecasting and Scheduling** module, select the *campaign* and *scheduling period* for which you want to create a work pattern.

3 Select **Create**.

4 On the **Work Patterns** screen, complete the fields.

5 To add shifts to the work pattern:

a. Under **Work Days / Consistency** > **Shift**, select **Add**.

b. From the **Shift Details** screen, select the shifts you want to add to the work pattern and select **Add Selected Shifts**.

The selected shifts are added to the work pattern.

6 To define the consistency of shift start times for all or specific days in the work pattern:

a. Expand the shift.

b. Determine which days you want the shifts to start at the same times.

c. For those specific days, select the same value from the drop-down list of integers of 1-7.

For example, if you want Monday and Thursday to start the shift at the same time, select 3 for both Monday and Thursday. (The 3 value just defines a specific start time group. You can select any value here, as long as it is the same value for both days.)

7 To ensure that the *shift events* start at the same times for the shift start time groups you created, select **Consistent Shift Events** for the relevant shifts. This setting only refers to the same shift events within the shift.

8 To add Voluntary Time Off (VTO) events to the work pattern:

   a. Under **VTO Events**, select **Add**.

   b. From the **VTO Events** screen, select the VTO events you want to add to the work pattern and select **Add Selected VTO Events**.

      The selected VTO events are added to the work pattern.

   c. From **Start Times**, set the recommended start time of each VTO event.

9 To add Overtime (OT) extensions to the work pattern:

   a. Under **OT Extension**, select **Add**.

   b. From the **OT Extension** screen, select the OT extension you want to add to the work pattern and select **Add Selected OT Extensions**.

      The selected OT extensions are added to the work pattern.

   c. From **Start Times**, set the recommended start time of each OT extension.

10 When you have completed all fields on the **Work Patterns** screen, select **Save**.

The new work pattern appears on the **Work Patterns** screen. To view the defined shifts, VTO events and OT extensions, select the arrow next to the work pattern name to expand the view.

What to do next

Create a rotation, page 110 or Workflow: Assign work rules to employees, page 135

Related topics

Work pattern details, page 103

Examples: Days off and consistency start time settings, page 106

Related information

Set up campaign-specific work rules (*Workforce Management Forecasting and Scheduling Guide*)

Monthly scheduling (*Workforce Management Forecasting and Scheduling Guide*)

Work pattern details

When creating or editing a work pattern, define or update data about the work pattern.

Field	Description
Organization	When creating work patterns from the **Work Administration** module, this is a read-only field that displays the *organization* for which the work pattern is created (the selected organization). NOTE: This field *only* appears when creating work patterns from the **Work Administration** module, under **Work Rules**.
Campaign	When creating work pattern exceptions from the **Forecasting and Scheduling** module, this is a read-only field that displays the *campaign* for which the work pattern is created. NOTE: This field *only* appears when creating work patterns from the **Forecasting and Scheduling** module, under **Work Rules**.
Name	Defines the name of the work pattern. For example: *FT 9 hr*; *PT Flex No Weekend*; *FT 8-hr w/ResearchDays*
Description	Optional: Describes the work pattern. For example: *Full-time 9-hour shifts with no weekends and 1 research day*.
Consistency Tolerance	Defines the time variation allowed between start times of the shifts, within which the system *tolerates* the difference between the start times. For example: • If **Consistency Tolerance** is set to **0**, start times of shifts *must be identical*. The system does *not* tolerate any variance between the start times. • If **Consistency Tolerance** is set to **15**, shifts can start within 15 minutes of one another. The system is tolerant of inconsistent start times of up to 15 minutes. In this example, shifts that start at 8:00, 8:05, 8:10 and 8:15 are all within a 15-minute consistency tolerance. If the shifts start at 7:45, 8:00, and 8:15, they are outside the consistency tolerance. The greatest difference between shifts (7:45 and 8:15) is greater than 15 minutes.
Employee Type	Defines the type of employee assigned to the work pattern. Values include: **10-4**, **Contract**, **Full-time**, **Part-time**, **Seasonal**, **Supervisor**.

Field	Description
Work Pattern Type	Defines the type and duration of the work pattern. Values include: **Week**, **28 Day Month**, **29 Day Month**, **30 Day Month**, or **31 Day Month**. Note: This field *only* appears if you have the **Monthly Forecast and Rules** license. If you do *not* have this license enabled, the work pattern is defined for a week *only*.
Work Days / Consistency	
Possible Days Off	Specifies the days that could be scheduled as days off *in the work pattern*. Note that this sets a *possible* or *recommended* work pattern - the scheduling engine determines the optimal schedule in order to meet defined service goals. For a *weekly* work pattern (**Work Pattern Type** = **Week**), the days are displayed as days in a week (for example: Monday-Sunday). For a *monthly* work pattern (**Work Pattern Type** = **28, 29, 30, or 31 Day Month**), the days are displayed as numbers of days in the month (for example: 1-30).
Minimum Consecutive Days	Defines the *minimum* number of days in a row that are scheduled as days off in the work pattern.
Maximum Consecutive Days	Defines the *maximum* number of days in a row that are scheduled as days off in the work pattern.
Shift	
Shift	Name of the shift added to the work pattern. To add a shift to the work pattern, select **Add**, select the shifts and select **Add Selected Shifts**.

Field	Description
Possible Days Off (for the selected shift)	Specifies the days that could be scheduled as days off *of the shift*. For example, you might want to set possible days off for a longer shift to be every other day, altering it with a shorter shift. Note that this sets a *possible* or *recommended* shift pattern - the scheduling engine determines the optimal schedule in order to meet defined service goals. For a *weekly* work pattern (**Work Pattern Type** = **Week**), the days are displayed as days in a week (for example: Monday-Sunday). For a *monthly* work pattern (**Work Pattern Type** = **28, 29, 30, or 31 Day Month**), the days are displayed as numbers of days in the month (for example: 1-30).
Minimum Consecutive Days	Defines the *minimum* number of days in a row that are scheduled as days off for the shift.
Maximum Consecutive Days	Defines the *maximum* number of days in a row that are scheduled as days off for the shift.
When shifts are expanded:	
Consistency shift start time group	Defines the shift start time group to which the days in the work pattern belong. All days within the same group (defined by the values 1-7) will have their shifts *start at the same time*. For example, you want the shift to start at the same time on Monday and Tuesday. Set these days to (group) 3. (It does *not* matter which group they belong to - as long as they belong to the *same* group.) This specific shift is defined to start any time between 8:00 AM and 10:00 AM. Therefore, the scheduling engine can select for the shift to start any time between 8:00 AM and 10:00 AM on these days, but it *must be the same start time on both of these days*. For *weekly* work patterns, the days in the work pattern are the days of the week (Monday-Sunday, for example). For *monthly* work patterns, the days in the work pattern are the number of days in the defined monthly work pattern (28, 29, 30 or 31). A null value (--) means that the day does *not* belong to any shift start time group.

Field	Description
Consistent Shift Events	Extends the shift start time group rule to also include consistent *shift event* start times (in addition to consistent *shift* start times). This setting only refers to the same shift events within the shift.
VTO Events	
VTO Event	Name of the VTO event added to the work pattern.
Start Times	Defines the recommended start time of the VTO event for the work pattern: • **Start of Shift**: VTO event should start at the beginning of the shift. • **End of Shift**: VTO event should start at the end of the shift. • **Start or End**: VTO event can start either at the start or end of the shift.
OT Extension	
OT Extension	Name of the OT extension added to the work pattern.
Start Times	Defines the recommended start time of the OT extension for the work pattern: • **Before Shift**: VTO event should start before the shift. • **After Shift**: VTO event should start after the shift. • **Before or After**: VTO event can start either before or after the shift.

Related topics

Create a work pattern, page 101

Edit a work pattern, page 108

Examples: Days off and consistency start time settings, page 106

Related information

Monthly scheduling (*Workforce Management Forecasting and Scheduling Guide*)

Examples: Days off and consistency start time settings

When creating a work pattern, you can define days that could be scheduled as days off. You can also define the days in the work pattern for which you want the shifts and shift events to start at the same time.

Example: Define possible days off for a weekly work pattern

For example, you do *not* want employees with a certain work pattern to have Mondays off. However, you want employees with this work pattern to have two days off in a row.

Define the following:

- Specify that Monday is not a possible day off (unselect the **Monday** check box).
- Set both the **Minimum Consecutive Days** and **Maximum Consecutive Days** fields to **2**.

Example: Consistency settings for shift start times for weekly work patterns

For example, a union rules states that every employee has to have the same start time every day of the week, but they can be scheduled at different start times from week to week.

1. For **Work Pattern A**, add the following shifts:
   - 9hr, 1hr lunch, training
   - 8.5hr, 1/2hr lunch, research
2. For every day in the weekly work pattern (Mon-Sun), set the consistency shift start time group for both shifts to group **4**.
3. For **Work Pattern B**, add the following shifts:
   - 4hr early
   - 9hr, 1hr lunch
4. For every day in the weekly work pattern (Mon-Sun), set the consistency shift start time group for both shifts to group **5**.

   Work Pattern A is used for one week in the scheduling period, and Work Pattern B is used for another week in the scheduling period.

   For the week using Work Pattern A, all shifts will start at the same time every day of the week. For the week using Work Pattern B, all shifts will start at the same time every day of the week. It could be that the start times for one week are different than the other week, but every day during the *same* week, the start times will be the same.

Example: Consistency settings for shifts and shift event start times for monthly work patterns

For example, you added a shift to a *monthly* work pattern called *9hr, 1hr lunch*. This shift is defined to start anytime between 9:00 - 10:30 AM.

You want the 1st, 5th, 10th and 15th day of the month to start this shift at the same time. For **Day 1**, **Day 5**, **Day 10** and **Day 15**, set the consistency shift start time group to 1. All days belonging to group 1 will start their shifts at the same time. The scheduling engine will start the shift on these days to be at some time from 9:00-10:30 AM. The shift start time the scheduling engine chooses will be the *same time on all four of these days*.

The *9hr, 1hr lunch* shift has three shift events:

- Morning Break
- Lunch
- Late Break

To ensure that these *shift events* start at the same time for all four of these days (**Day 1**, **Day 5**, **Day 10** and **Day 15**), select **Consistent Shift Events**. The scheduling engine ensures that the same shift events for all days belonging to the same shift start time group (1-7) will also start at the same time.

Related topics

Create a work pattern, page 101

Work pattern details, page 103

Edit a work pattern

Edit a work pattern for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Work Patterns**.
2. From the left pane, select the organization for which the work pattern was created.

   Select the same organization displayed in the **Organization** column for the work pattern to edit it. Otherwise, the **Edit** option is *not* available.
3. From the **Work Patterns** screen, select the work pattern you want to edit, and select **Edit**.
4. On the **Work Patterns** screen, edit any relevant fields and select **Save**.

Related topics

Work pattern details, page 103

Cleaning up skills, work rules, and queues, page 169

Copy a work pattern

Copy a work pattern for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Work Patterns**.
2. From the left pane, select the organization from which you want to copy the work pattern.
3. From the **Work Patterns** screen, select the work pattern you want to copy and select **Copy**.

   The work pattern is copied on the Work Patterns screen with the name: **Copy of <name of work pattern> 1**.
4. To rename the copied work pattern for the selected organization:
   a. Select the work pattern and select **Edit**.
   b. In the **Name** field, edit the name and select **Save**.

Example: Copy work pattern

1. You copy the work pattern, **FT 9 hr**, for the **Claims Entry** organization.
2. The name of the copied work pattern is **Copy of FT 9 hr 1**.
3. Select **Copy of FT 9 hr 1** and select **Edit**.
4. Rename the work pattern to: **FT 9 hr 2**.

Related topics

Work pattern details, page 103

Import work patterns

Import one or multiple work patterns into the WFO system.

After you have exported your data and made the required updates in an external location, you can import the updated data back into the system.

Before you begin

Export work patterns, page 170

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Work Patterns**.

2 Select the organization for which you want to import work patterns.

3 Select **Import**.

4 Complete the fields on the **File Setup** screen.

5 Select one of the following:

- **Import**: Imports the data as specified on the **File Setup** screen.
- **Select All**: Imports all data in the file, regardless of what is specified on the **File Setup** screen.

The system imports the data accordingly. It is populated as specified on the **Work Patterns** screen.

Related topics

File setup screen for imports and exports, page 147

Create a rotation

To assign employees a specific repeating sequence of work patterns, use *rotations*. Rotations override work patterns. When rotations are assigned, work patterns that were previously assigned are ignored.

Example: Create a rotation

Assign a group of employees three work patterns - A, B, and C - in a three-week rotation. Employees are assigned work pattern A for the first week, work pattern B for the second week, and work pattern C for the third week. For the fourth week, employees are assigned work pattern A again, and the cycle continues.

Before you begin

Create a work pattern, page 101 - Create the work patterns that you want to include in a rotation.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Rotations**.
2. From the left pane, select the organization for which you want to create a rotation, and select **Create**.
3. On the **Rotations** screen, complete the fields.
4. To add work patterns to the rotation:
   a. Under **Work Patterns**, select **Add**.
   b. From the **Work Patterns** screen, select the work patterns you want to add to the rotation and select **Add Selected Work Patterns**.
      The selected work patterns are added to the rotation.
5. Select **Save**.
   The new rotation appears on the **Rotations** page.
   After you create a rotation, assign it to employees. Assign *multiple work patterns* to an employee, or assign *a single rotation* to an employee.

What to do next

Create an assignment rule, page 113 or Workflow: Assign work rules to employees, page 135

Related topics

Rotation details, page 110

Rotation details

When creating or editing a rotation, define or update data about the rotation.

Field	Description
Name	Defines the name of the rotation. For example: *PT Rotation*; *FT Rotation*

Field	Description
Organization	Read-only field that displays the organization for which the rotation is created (the selected organization).
Alignment Date	Defines the date from which the rotation starts, which *must* align to the start of a business week. There *cannot* be more than 26 weeks in the rotation.
Work Patterns	Allows you to add work patterns to the rotation.

Related topics

Create a rotation, page 110

Edit a rotation, page 111

Edit a rotation

Edit a rotation for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Rotations**.

2 From the left pane, select the organization for which the rotation was created.

Select the same organization displayed in the **Organization** column for the rotation to edit it. Otherwise, the **Edit** option is *not* available.

3 From the **Rotations** screen, select the rotation you want to edit, and select **Edit**.

4 On the **Rotations** screen, edit any relevant fields and select **Save**.

Related topics

Rotation details, page 110

Copy a rotation

Copy a rotation for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Rotations**.

2 From the left pane, select the organization from which you want to copy the rotation.

3 From the **Rotations** screen, select the rotation you want to copy and select **Copy**.

The rotation is copied on the Rotations screen with the name: **Copy of <name of rotation> 1**.

4 To rename the copied rotation for the selected organization:

a. Select the rotation and select **Edit**.

b. In the **Name** field, edit the name and select **Save**.

Example: Copy rotation

1. You copy the rotation, **FT Rotation**, for the **Dallas** organization.
2. The name of the copied rotation is **Copy of FT Rotation 1**.
3. Select **Copy of FT Rotation 1** and select **Edit**.
4. Rename the rotation to: **FT Rotation 2**.

Related topics

Rotation details, page 110

Delete a rotation

If required, you can delete a rotation for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Rotations**.
2. From the left pane, select the organization for which you want to delete the rotation.
3. From the **Rotations** screen, select the rotation you want to delete and select **Delete**.
4. To confirm the deletion, select **OK**.

Related topics

Create a rotation, page 110

Create an assignment rule

For work environments that have complex work rules, rotations, or fairness needs due to employee or union requirements, create *assignment rules*.

Assignment rules *supplement* work patterns, and are optional. Employees must be assigned at least one work pattern or rotation *before* applying assignment rules for that employee.

Before you begin

- Create a work pattern, page 101
- Create a rotation, page 110

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Assignment Rules**.
2. From the left pane, select the organization for which you want to create an assignment rule, and select **Create**.
3. On the **Assignment Rules** screen, complete the fields.
4. Under **Rule Type**, select one of the following:
    - **Employee must work**: Defines rules related to how many work units (shifts, days, and times) an employee must work.
    - **Employee must have off**: Defines rules related to how many work units (days and times) an employee must *not* work (take time off).
    - **Employees on this team must**: Defines work constraints related to employees on the same team.
    - **Employee must start**: Defines rules related to start times of shifts for an employee.
5. Determine the next step:
    - If you selected **Employee must work** or **Employee must have off**, under **Count**: Select options related to the number of work units an employee must work or *not* work.
    - If you selected **Employees on this team must**, under **Team Constraint Type**: Select options related to the start and end times of shifts, and overlap times of shifts for employees on the same team.
    - If you selected **Employee must start**, under **Start Unit**, select options related to the start time of shifts for an employee.

> Assign only *one* team scheduling rule to each employee.

6. When you have completed your selections for the assignment rule, select **Save**.

What to do next

Create a time bank, page 125 or Workflow: Assign work rules to employees, page 135

Related topics

Assignment rule details, page 114
Types of assignment rules, page 114

Assignment rule details

When creating or editing an assignment rule, define or update data about the assignment rule.

Field	Description
Name	Defines the name of the assignment rule. For example: *FT Rule*; *PT Rule*
Organization	Read-only field that displays the organization for which the assignment rule is created (the selected organization).
Priority	Specifies the priority of the assignment rule among the other defined assignment rules.

Related topics

Create an assignment rule, page 113

Edit an assignment rule, page 115

Types of assignment rules, page 114

Types of assignment rules

There are four types of assignment rules. When you select to create an assignment rule, you are prompted to select a **Rule Type**. Depending on the rule type you select, you need to define options related to the rules.

Shift rules

Shift rules ensure that employees are scheduled for work or are given time off within a specified time period.

Examples of shift rules include:

- You want to define that an employee must work at least four days each week.
- You want to define that an employee must have exactly two days off each week.

Rule types related to shift rules include:

- **Employee must work**
- **Employee must have off**

After selecting one of these options, the **Count** options appear. These options are related to the number of work units an employee must work or not work, respectively.

Fairness rules

Fairness rules ensure that specific events are scheduled the same number of times within a specified period for each member of a group. The scheduling engine determines the exact number of times.

Examples of fairness rules include:

- You want to define that every employee on a specific team must work a fair number of night shifts every week.

- You want to define that every employee on a specific team must work a fair number of hours every week with a tolerance of 120 minutes.

The rule type related to fairness rules includes:

- **Employee on this team must**

After selecting this option, the **Team Constraint Type** options appear. These options are related to the start and end times of shifts, and overlap times of shifts for employees on the same team.

Consistency rules

Consistency rules specify whether employee schedules can change from week to week in multi-week schedules, or whether schedules must apply to the entire scheduling period.

An example of a consistency rule is: You want to define that an employee must start all shifts at the same time every week.

The rule type related to consistency rules includes:

- **Employee must start**

After selecting this option, the **Start Unit** options appear, which are related to selecting the start time of shifts for an employee.

> Consistency rules *only* apply to multi-week scheduling periods.

Team scheduling rules

Team scheduling rules specify that shifts of team members start at the same time, end at the same time, or overlap. The system defines a team by the supervisor, team lead, or all employees to whom the rule is assigned.

Examples of team scheduling rules include:

- You want to define that all employees on a team start at the same times with a tolerance of 30 minutes.
- You want to define that all employees on a team work shifts that overlap 240 minutes every day with their supervisor.

The rule type related to team scheduling rules includes:

- **Employees on this team must**

After selecting this option, the **Team Constraint** options appear. These options are related to the start and end times of shifts, and overlap times of shifts for employees on the same team.

Related topics

Create an assignment rule, page 113

Edit an assignment rule, page 115

Assignment rule details, page 114

Edit an assignment rule

Edit an assignment rule for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Assignment Rules**.

2 From the left pane, select the organization for which the assignment rule was created.

Select the same organization displayed in the **Organization** column for the assignment rule to edit it. Otherwise, the **Edit** option is *not* available.

3 From the **Assignment Rules** screen, select the assignment rule you want to edit, and select **Edit**.

4 On the **Assignment Rules** screen, edit any relevant fields and select **Save**.

Related topics

Assignment rule details, page 114

Types of assignment rules, page 114

Copy an assignment rule

Copy an assignment rule for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Assignment Rules**.

2 From the left pane, select the organization from which you want to copy the assignment rule.

3 From the **Assignment Rules** screen, select the assignment rule you want to copy and select **Copy**.

The assignment rule is copied on the Assignment Rules screen with the name: **Copy of <name of assignment rule> 1**.

4 To rename the copied assignment rule for the selected organization:

a. Select the assignment rule and select **Edit**.

b. In the **Name** field, edit the name and select **Save**.

Example: Copy assignment rule

1 You copy the assignment rule, **FT Rule**, for the **Americas UC** organization.

2 The name of the copied assignment rule is **Copy of FT Rule 1**.

3 Select **Copy of FT Rule 1** and select **Edit**.

4 Rename the assignment rule to: **FT Rule 2**.

Related topics

Assignment rule details, page 114

Types of assignment rules, page 114

Delete an assignment rule

If required, you can delete an assignment rule for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Assignment Rules**.

2 From the left pane, select the organization for which you want to delete the assignment rule.

3. From the **Assignment Rules** screen, select the assignment rule you want to delete and select **Delete**.
4. To confirm the deletion, select **OK**.

Related topics

Create an assignment rule, page 113

Workflow: Set up project scheduling

Create the necessary components for managing project scheduling, which is non-volume-driven work.

In the Operations industry, employees process volume-driven work and non-volume-driven work. Non-volume-driven work includes processing work, such as filing and inventories. Project scheduling allows you to incorporate non-volume-driven activities in schedules.

Workflow

1. Create project work queues, page 118

   Set up one or more *project* queues, and one queue that is *not* a project queue (such as an **Operations** or **Email** work queue).
2. Create project activities, page 119

   Create an activity with **Project** as the media type. Link only one project activity to each project work queue.
3. Create a project work rule, page 120

   To define the length of time and the time period in which you want employees to perform the project activity, create a project rule. Use project work rules when you have flexibility about *when* the work is done and *who* does the work. In this way, they are similar to flexible shift events.
4. Create project skills, page 123

   Create a skill with **Project** as the media type.

Related information

Workflow: Generate a schedule for project queues (*Workforce Management Forecasting and Scheduling Guide*).

Create project work queues

Set up one or more *project* queues, and one queue that is *not* a project work queue (such as an **Operations** or **Email** work queue).

Procedure

1. Go to **Work Administration**. Under **Work Queues**, select **Settings**.
2. Select **Create work queue**.
3. On the **Work Queue Settings** screen, complete the fields.
4. In the **Media** field, select **Project**.
5. Save your changes for the project work queue.
6. For every project queue you want to create, repeat step 2-step 5.
7. Create at least one work queue that is *not* a project work queue.

   For example, set the **Media** field to **Operations** or **Email**.

What to do next

Create project activities, page 119

Related topics

Create a normal work queue, page 20

Work queue settings, page 21

Create project activities

Create an activity with **Project** as the sole media type. Link only one project activity to each project work queue.

Before you begin

Create project work queues, page 118

Procedure

1. Go to **Work Administration**. Under **Activities**, select **Activities**.
2. Select **Create Activity**.
3. On the **Activity Details** screen, complete the fields.
4. In the **Media** field, select **Project**.

   Use in Calendar Event is automatically selected.
5. From the **Work Queues** field, select the project work queue you set up.

> Although you can link multiple project activities to the same project work queue, link only *one* project activity to each project work queue.

6. When you have completed the remaining fields, select **Save**.

What to do next

Create a project work rule, page 120

Related topics

Create an activity, page 50

Activity details, page 54

Project work rules

Project work rules are used when you have flexibility about *when* the work is done and *who* does the work. In this way, they are similar to flexible shift events.

Example: Create a project work rule

An employee works on filing every Monday from 9:00 AM to 5:00 PM. Create a shift that includes the filing activity, rather than creating a project work rule for this purpose.

Other employees do filing work between 0-2 hours every day. Therefore, create project work rules for this work.

What do project rules define?

Project rules specify:

- Time frame in which work can be done each day of the week
- Length of time for a segment of work
- Maximum number of employees that can be assigned to work on the segment simultaneously
- Maximum count for day and week per employee

Related topics

Create a project work rule, page 120

Create a project work rule

To define the length of time and time period in which you want employees to perform a project activity, create a project rule. Use project work rules when you have flexibility about *when* the work is done and *who* does the work. In this way, they are similar to flexible shift events.

Before you begin

Create project activities, page 119

Procedure

1. To create a project rule on an organizational level for *all* campaigns, go to **Work Administration**. Under **Work Rules**, select **Project Rules**.

   If you want to *override* the organizational settings and create a project rule exception for a *specific scheduling period only*, go to **Forecasting and Scheduling**. Under **Work Rules**, select **Project Rules**.
2. From the **Work Administration** module, from the left pane, select the *organization* for which you want to create a project rule.

   When creating an exception for a scheduling period, from the **Forecasting and Scheduling** module, select the *campaign* and *scheduling period* for which you want to create a project rule.
3. Select **Create**.
4. From the **Activity** field, select one of the project activities you defined.
5. From **Start Times**, select the cell in the grid that represents the start time of the shift:
   a. Select the day of the week for which you want to define the start time of the project work.
   b. Select the cell or cells representing the start times in the grid for the selected day.

> Setting a range of start times gives the scheduling engine more flexibility in creating an optimal schedule that matches your service level and employee availability.

6. When you have completed the remaining fields for the project rule, select **Save**.

What to do next

Create project skills, page 123

Related topics

[Project work rule details], page 121

[Project work rules], page 119

Related information

Set up campaign-specific work rules (*Workforce Management Forecasting and Scheduling Guide*)

Project work rule details

When creating or editing a project rule, define or update data about the project rule.

Field	Description
Organization	When creating project rules from the **Work Administration** module, this is a read-only field that displays the *organization* for which the project rule is created (the selected organization). NOTE: This field *only* appears when creating project rules from the **Work Administration** module, under **Work Rules**.
Campaign	When creating project rule exceptions from the **Forecasting and Scheduling** module, this is a read-only field that displays the *campaign* for which the project rule is created. NOTE: This field *only* appears when creating project rules from the **Forecasting and Scheduling** module, under **Work Rules**.
Name	Defines the name of the project rule. For example: *2-hr filing work*, *1.5-hr inventory work with break*
Description	Optional: Describes the project rule. For example: *3-hr filing work with 15-minute break*.
Activity	Specifies the project activity created for the selected organization (with the **Media** field set to **Project** for the activity).
Duration	Indicates the length of the project rule in HH:MM time format.
Daily Maximum Count Per Employee	Defines the maximum number of project work segments for every employee in one *day*. The value of this field can be 1 or more, or **Unlimited**. Note: For the purposes of system calculation, Unlimited is set to 32,767.

Field	Description
Weekly Maximum Count Per Employee	Defines the maximum number of project work segments for every employee in one *week*. The value of this field can be 1 or more, or **Unlimited**.
Maximum Simultaneous Employees	Defines the maximum number of employees who can be assigned to this project. The value of this field can be 1 or more, or **Unlimited**.
Start Time	Defines the start times of the project work for each day of the work week.

Related topics

Create a project work rule, page 120

Edit a project work rule, page 122

Edit a project work rule

Edit a project rule for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Project Rules**.

2 From the left pane, select the organization for which the project rule was created.

Select the same organization displayed in the **Organization** column for the project rule to edit it. Otherwise, the **Edit** option is *not* available.

3 From the **Project Rules** screen, select the project rule you want to edit, and select **Edit**.

4 On the **Project Rules** screen, edit any relevant fields and select **Save**.

Related topics

Project work rule details, page 121

Copy a project work rule

Copy a project rule for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Project Rules**.

2 From the left pane, select the organization from which you want to copy the project rule.

3 From the **Project Rules** screen, select the project rule you want to copy and select **Copy**.

The project rule is copied on the Project Rules screen with the name: **Copy of <name of project rule> 1**.

4 To rename the copied project rule for the selected organization:

a. Select the project rule and select **Edit**.

b. In the **Name** field, edit the name and select **Save**.

Example: Copy project rule

1 You copy the project rule, **2-hr Filing**, for the **Chicago Health** organization.
2 The name of the copied project rule is **Copy of 2-hr Filing 1**.
3 Select **Copy of 2-hr Filing 1** and select **Edit**.
4 Rename the project rule to: **2-hr Filing 2**.

Related topics

Project work rule details, page 121

Delete a project work rule

If required, you can delete a project rule for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Project Rules**.
2 From the left pane, select the organization for which you want to delete the project rule.
3 From the **Project Rules** screen, select the project rule you want to delete and select **Delete**.
4 To confirm the deletion, select **OK**.

Related topics

Create a project work rule, page 120

Create project skills

Create a skill with **Project** as the media type.

Before you begin

Create a project work rule, page 120

Procedure

1 Go to **Organization Management**. Under **Employee Attributes**, select **Skills**.
2 Select **Create Skill**.
3 On the **Skill** screen, complete the fields.
4 In the **Media Type** field, select **Project**.
5 When you have completed the remaining fields, select **Save**.

Related topics

Create a skill, page 150

Time banking

Time banking allows employees to work *more* hours during busy times of the year and *fewer* hours during slower times of the year. Employees bank hours when they work *more* than the usual amount of time. They subtract from the bank when they work *less* than the usual number of hours.

Purposes of time banks

Companies that use time banking often have full-time salaried employees, with large seasonal variations in volume. During the year, employees work the same number of total hours. They just do *not* work a set number of hours *every week*. The seasonal volume of the company drives their work schedule.

Creating a time bank

There are three ways to create a time bank:

- Import data from Strategic Planner, which is the best practice.

  If your company has purchased *Strategic Planner*, use it to create long-term plans regarding the number of hours your employees need to work. You can export Strategic Planner data to the Forecasting and Scheduling module to create time banks.
- Create a time bank from **Work Administration** > **Work Rules** > **Time Banks**, and enter the total target hours manually.

  The system calculates daily target hours by dividing the total target hours by the total amount of days left in the time bank. It calculates the weekly target hours by multiplying the daily target hours by the number of days in the period. A period is usually seven days.
- Import data from a text file.

  The system calculates the base period of the time bank based on the organization start day. If there are too *few* base period values, extra weeks have target hours of zero (0). If there are too *many* base period values, extra values are ignored. Figures are rounded to the nearest 15 minutes.

Related topics

Import time banks, page 124

Create a time bank, page 125

Strategic Planner plan for time banks, page 130

Edit time bank base period hours, page 128

Assign time banks to employees, page 145

Related information

Time banking (*Workforce Management Strategic Planners Guide*)

Import time banks

You can import time banks for an organization.

Before you begin

Verify that the import file has the following column headers in the first row:

- **NAME**

- **STARTDATE**
- **ENDDATE**
- **DAYOFWEEK**
- **TARGETMINUTESWEEK1**
- **TARGETMINUTES2**
- **TARGETMINUTESWEEK[N]**

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Time Banks**.

2 Select the organization for which you want to import time banks.

3 Select **Import**.

4 Complete the fields on the **File Setup** screen.

5 Select **Import**.

The system imports the data accordingly. It is populated as specified on the **Time Banks** screen.

6 Note the following:

- The time bank base period dates are based on the organization week boundary day.
- The algorithm does *not* distinguish between the first period being a partial or a full week; it puts the hours sequentially into each base period.
- If there are too *few* week values, the extra weeks have target hours of 0.
- If there are too *many* week values, the extra values are ignored.
- If a data value is unreadable because it is *not* numeric, it is replaced with a 0.
- If a data value is *not* divisible by 15 minutes, it is rounded to a value divisible by 15.
- If the **Start Day of Week** is **-1**, it is *not* imported. This value indicates that the data is *not* weekly data. Only weekly period values can be imported.

Related topics

File setup screen for imports and exports, page 147

Workflow: Assign work rules to employees, page 135

Create a time bank

Create a time bank, which allows employees to work *longer* hours during *busy* periods and *fewer* hours during *slow* periods.

Employees bank hours when they work *more* than the usual number of hours. They subtract from the bank when they work *less* than the usual number of hours.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Time Banks**.

2 From the left pane, select the organization for which you want to create a time bank, and select **Create**.

3 On the **Time Bank Detail** screen, complete the fields.

4 For **Target Hours**, do one of the following:

- If you want to enter the total hours manually, select **Target Hours**. Enter the hours and minutes for the time bank accordingly.
- If you want to use a Strategic Planner plan to overwrite data defined for the time bank, select **Use Strategic Planner Plan**. Select the plan from this drop-down list. Make sure that the plan overlaps the start and end date specified for the time bank.

5 Select **Apply**.

The system applies the selected target hours to the time bank, and displays the **Details** grid.

6 View the time bank hours in the **Details** grid:

- The entire time bank period is shown, divided into seven-day periods (typically). Each seven-day period is called a **Base Period**. (The first and last base periods could be less than seven days in length.)
- The system divides the total target hours by the number of days defined in the time frame of the time bank. It calculates the total hours for each **Base Period**, and populates each **Base Period** with that number of hours. Figures are rounded to the nearest 15 minutes.

7 To lock a specific base period, which prevents the hours for that period from being edited:

a. Select the cell displaying the base period you want to lock, select , and select **Lock**.

b. To unlock the base period, select and select **Unlock**.

8 To save the time bank to the selected organization, select **Save**.

The time bank is applied to the selected organization and all of its child organizations.

What to do next

Workflow: Assign work rules to employees, page 135

Related topics

Time bank details, page 126
Strategic Planner plan for time banks, page 130
Edit time bank base period hours, page 128
Create time bank intermediate period, page 129

Related information

Time banking scheduling (*Workforce Management Forecasting and Scheduling Guide*)

Time bank details

When creating or editing a time bank, define or update data about the time bank.

Field	Description
Name	Defines the name for the time bank (50-character limit)

Field	Description
Date Range	Defines the start and end date for which the time bank is effective. Time banks *must* be between 6 weeks and 1 year in length. By default, the date range is set for the entire current year - from January 1 to December 31 of the current year. If you want to define a shorter time frame for the time bank, select the **Calendar** icon and set the date range accordingly.
Organization	Read-only field that displays the organization for which the time bank is created (the selected organization).
Target Hours	
Update Time Bank Hours	Specifies that target hours can be calculated from one of the following: • **Target Hours, Minutes**: Defines the total time (in hours and minutes) included in the time bank. To enter the total hours for the time bank manually, select this option and enter the hours and minutes for the time bank. • **Use Strategic Planner Plan**: Defines the Strategic Planner data you want to use to overwrite all or some of the data defined for the time bank. Make sure that the plan overlaps the start date and end date specified for the time bank. If you change the start or end date, you need to reselect the Strategic Planner plan. Strategic Planner plans are loaded differently, based on whether they were exported from a *Monthly* or *Weekly Scenario*.
Details	
Base Period	Typically a 7-day period within the defined time frame of the time bank. The system divides the target hours for the time bank by the number of days defined in the time frame of the time bank. It then populates each **Base Period** with that number for the days in the period. Figures are rounded to the nearest 15 minutes. Base periods start on the same day as the organization start day. The first and last base periods could be less than seven days in length.

Field	Description
Intermediate Period	Groups of base periods you can create to view the target total hours for periods. The intermediate periods are *longer* than the weekly base periods, but *shorter* than the whole time bank period. For example, a whole time bank period is 1 year. You can create intermediate periods of 4 months each, which include 16 base periods. Intermediate periods do *not* need to contain equal numbers of base periods. For example, you can have an intermediate period with 3 base periods, another intermediate period with 4 base periods, and another with 2 base periods.
Target Bank Hours	Displays the **Target Hours** you defined for the time bank.

Related topics

Create a time bank, page 125

Edit a time bank, page 132

Edit time bank base period hours, page 128

Create time bank intermediate period, page 129

Strategic Planner plan for time banks, page 130

Related information

Strategic Planner Plan (*Workforce Management Strategic Planners Guide*)

View time banks for a scheduling period and adjust paid hours (*Workforce Management Forecasting and Scheduling Guide*)

Edit time bank base period hours

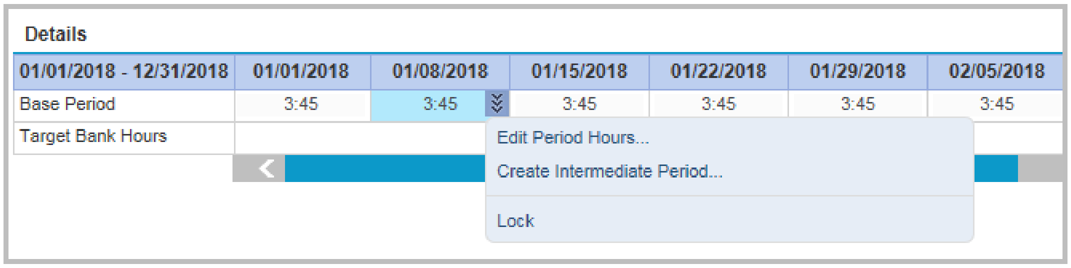
When you create a time bank, the system displays the target hours by Base Period. Base Period is typically a seven-day period within the time frame of the time bank. You can modify the time bank hours for a specific or multiple base periods.

Before you begin

Create a time bank, page 125

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Time Banks**.
2. From the left pane, select the organization for which you want to edit the base period hours for a time bank.
3. On the **Time Banks** screen, select the time bank for which you want to edit base period hours.
4. Select **Edit**.
5. From the **Details** grid, select the cell displaying the hours for that base period.
6. Select and select **Edit Period Hours**.



> You can edit the time bank hours for *multiple* base periods at the same time. Highlight the group of cells, select , and select **Edit Period Hours**. The system updates the values for the selected base periods.

7 Modify the hours for the selected base period.

Valid values are integers or integers with a minutes value, in increments of 15. For example, 30:00, 30:15, 22:30, and 32:45 are all valid values.

8 Select **OK**.

The updated number of hours appears for that **Base Period**.

Related topics

Time bank details, page 126

Create time bank intermediate period, page 129

Create time bank intermediate period

You can view the total number of time bank hours for *multiple* base periods by creating *intermediate periods*. Intermediate periods show the target hours for periods that are *longer* than the weekly base periods, but *shorter* than the whole time bank period.

Example: Create intermediate periods for a time bank

You create a time bank for one year, with base periods of a week each throughout that year. You want to view the total time bank hours for each season: Winter, Spring, Summer, and Fall.

Therefore, create the following intermediate periods:

- January 1-March 31 (Winter)
- April 1-May 31 (Spring)
- June 1-August 31 (Summer)
- September 1-November 30 (Fall)

Before you begin

Create a time bank, page 125

Procedure

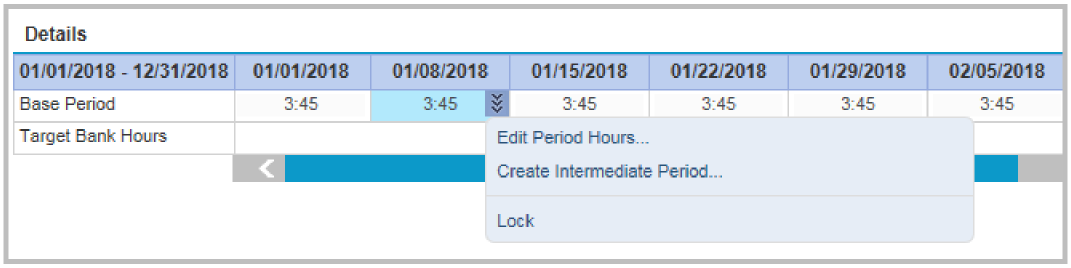
1 Go to **Work Administration**. Under **Work Rules**, select **Time Banks**.

2 From the left pane, select the organization for which you want to create an intermediate period for a time bank.

3 On the **Time Banks** screen, select the time bank for which you want to create an intermediate period.

4 Select **Edit**.

5 Select the cell displaying the base period from which you want to start a group, select , and select **Create Intermediate Period**.



6 From **Start**, verify the period from which you want to start the intermediate period. You can change the period by selecting it from the drop-down list.

7 From **End**, select the period until which you want to end the intermediate period.

8 Select **OK**.

The system adds the **Intermediate Period** row after **Base Period**. It displays the total target hours for the selected group of base periods for those dates.

9 After you create an intermediate period, you can do the following:

- To edit a *specific* intermediate period, select the cell, select , select **Edit Intermediate Period**, and edit the period accordingly.
- To remove *all* intermediate periods at once, select the cell, select , select **Clear Intermediate Periods**. *All* intermediate periods are removed from the **Details** grid.

Related topics

Time bank details, page 126

Edit time bank base period hours, page 128

Strategic Planner plan for time banks

When you create a time bank, you can use Strategic Planner data to overwrite all or some of the data defined by the time bank.

If you select **Use Strategic Planner Plan** for the **Update Time Bank Hours** field:

- Data is imported into the time bank in the same way as when you are creating a time bank.
- Intermediate and total target period locks are removed.
- Unlocked base period cells with data available from Strategic Planner are overwritten in the time bank, regardless of locked intermediate, or top period levels.
- If a base period cell is locked in the time bank, the value for that week is *not* imported.
- For base period weeks that do *not* overlap with data from Strategic Planner, the values for the base periods are retained.

Related topics

Time bank details, page 126

Create a time bank, page 125

[Strategic Planner Plan: Monthly scenario](), page 131
[Strategic Planner Plan: Weekly scenario](), page 131

Strategic Planner Plan: Monthly scenario

For Strategic Planner Plans exported from a *Monthly* Scenario, the monthly values are used for the overlapping weeks in the time bank.

Example: Export Strategic Planner Plan from a Monthly Scenario

Select **Use Strategic Planner Plan** for **Update Time Bank Hours**. The Strategic Planner plans are exported from a *Monthly Scenario*.

If the time bank has 12 months, it has 12 values.

For example, you have three years of data for 2008–2010. You are loading data for 2009. The second year data (values 13–24) is used. The start day for the organization is Monday. The plan value 42 is used for January and plan value 35 for February. The following week values are stored for the first few weeks:

- 1/1-1/4 (partial week) - 42/7 days X 3 days = 18 hours
- 1/4-1/11 - 42 hours
- 1/12-1/18 - 42 hours
- 1/19-1/25 - 42 hours
- 1/26 or 2/1 (week divided between months) - 42/7 X 6 days + 35/7 X 1 day = 41 hours

Related topics

Strategic Planner Plan: Weekly scenario, page 131
Strategic Planner plan for time banks, page 130
Time bank details, page 126
Create a time bank, page 125

Strategic Planner Plan: Weekly scenario

For Strategic Planner Plans exported from a *Weekly* Scenario, the weekly values used are loaded into the weeks they overlap the most.

Example: Export Strategic Planner Plan from a Weekly Scenario

Select **Use Strategic Planner Plan** for **Update Time Bank Hours**. The Strategic Planner plans are exported from a *Weekly Scenario*.

There is no guarantee that the weekly values start on a Monday and are loaded into an organization that starts on a Monday. The plan weeks start on a Wednesday, January 21 to January 27, 2009. You are loading the data into a time bank for the entire 2009 year for an organization that starts on a Monday.

Therefore, you are loading in one of two weeks:

- January 19 to January 25
- January 26 to February 1

More days overlap with January 19 to January 25. Therefore, the hours for the first week are put in this week. Data is then loaded consecutively until the plan runs out of data to load, or Forecasting and Scheduling runs out of weeks in the time bank.

Related topics

Strategic Planner Plan: Monthly scenario, page 131

Strategic Planner plan for time banks, page 130

Time bank details, page 126

Create a time bank, page 125

Edit a time bank

Edit a time bank for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Time Banks**.
2. From the left pane, select the organization for which the time bank was created.

   Select the same organization displayed in the **Organization** column for the time bank to edit it. Otherwise, the **Edit** option is *not* available.
3. From the **Time Banks** screen, select the time bank you want to edit, and select **Edit**.
4. On the **Time Banks** screen, edit any relevant fields.

   If you modify the **Target Hours**, select **Apply** to update the **Details** grid.
5. Select **Save**.

   If you edit the **Date Range**, note the following:

   - New values are added or subtracted proportionately to all unlocked base period hours in the **Details** grid.
   - Intermediate periods are removed.
   - Base period locks are *not* changed.

   If you edit **Target Bank Hours**, the new value is added or subtracted proportionately to all unlocked periods in the **Details** grid.

Related topics

Time bank details, page 126

Copy a time bank

Copy a time bank for an organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Time Banks**.
2. From the left pane, select the organization from which you want to copy the time bank.

Select the same organization displayed in the **Owner Organization** column for the time bank to copy it. Otherwise, the **Copy** option is *not* available.

3. From the **Time Banks** screen, select the time bank you want to copy and select **Copy**.

   The time bank is copied to the Time Banks screen with the name: **Copy of <name of time bank> 1**.

4. To rename the copied time bank for the selected organization:
   a. Select the time bank and select **Edit**.
   b. In the **Name** field, edit the name and select **Save**.

Example: Copy time bank

1. You copy the time bank, **Winter Holiday Season**, for the **Advisor Express** organization.
2. The name of the copied time bank is **Copy of Winter Holiday Season 1**.
3. Select **Copy of Winter Holiday Season 1** and select **Edit**.
4. Rename the time bank to: **Winter Holiday Season 2**.

Related topics

Time bank details, page 126

Export time banks

You can export time bank data to an external file.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Time Banks**.
2. Select the organization from which you want to export time banks.
3. Select **Export**.
4. On the **File Setup** screen in the **Delimiter** field, select one of the following as the field delimiter (separator) used in the file:
   - Tab
   - Comma
   - Semicolon
5. Select **Export**, and then **Done**.

   The system exports the data to the file, **Timebanks.txt**.

6. At the prompt, open or save the export file.

Related topics

File setup screen for imports and exports, page 147
Import time banks, page 124

Delete a time bank

If required, you can delete a time bank for an organization.

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Time Banks**.

2 From the left pane, select the organization for which you want to delete the time bank.

3 From the **Time Banks** screen, select the time bank you want to delete and select **Delete**.

4 To confirm the deletion, select **OK**.

Related topics

Create a time bank, page 125

Workflow: Assign work rules to employees

After defining work rules in the system, assign the relevant work rules and work-related parameters to employees. These rules and parameters determine how an employee is scheduled.

Before you begin

Define all relevant work rules - see Workflow: Set up work rules, page 77

Workflow

1. Select employees and assign initial work rules, page 135.

   After you define work rules in the system, you can then assign them to employees. When you generate the schedule, the scheduling engine uses the work patterns and other work rules you assigned to employees to generate an optimal schedule.

2. Assign work patterns to employees, page 140.

   Assign work patterns to employees, which are a set of shifts. A work pattern includes one or more shifts and possible days off for one week.

3. Assign assignment rules to employees, page 142

   Assign assignment rules to employees, which *supplement* work patterns. Employees must be assigned at least one work pattern or rotation *before* applying assignment rules for that employee.

4. Assign rotations to employees, page 145

   Assign rotations to employees, which are a specific repeating sequence of work patterns. Rotations *override* work patterns. When rotations are assigned, work patterns that were previously assigned are ignored.

5. Assign time banks to employees, page 145

   Assign time banks to employees, which allow employees to work longer hours during busy times and fewer hours during slower times. Employees bank hours when they work more than usual, and subtract hours when they work less than usual.

6. Review and save assigned work rules, page 146

   After defining all required work rules to selected employees, it is critical to review and save these settings in the system. These rules and parameters determine how an employee is scheduled.

Select employees and assign initial work rules

After you define work rules in the system, you can then assign them to employees. When you generate the schedule, the scheduling engine uses the work patterns and other work rules you assigned to employees to generate an optimal schedule.

Before you begin

- Create the relevant work rules you need to assign to employees - see Workflow: Set up work rules, page 77.

Procedure

1. To assign work rules on an organizational level for *all* campaigns, go to **User Management**. Under **Employees**, select **Work Rules**.

If you want to *override* the organizational settings and assign work rules for a *specific scheduling period only*, go to **Forecasting and Scheduling**. Under **Employees**, select **Work Rules**.

2 From the **User Management** module, set the filters to display the employees for which you want to assign work rules.

To assign work rules for a *specific scheduling period only*, from the **Forecasting and Scheduling** module, select the *campaign* and *scheduling period* and set the filters to display the employees for which you want to assign work rules.

3 Select the employee or multiple employees for which you want to assign work rules:

- To assign work rules to *one individual employee*, select the employee.
- To assign the same work rules to *specific multiple employees*, select the ones you want and select **View**.
- To assign the same work rules to *all displayed employees*, select **Select All**.

If you select multiple employees: Only the fields for which all employees have the same value display a value. Fields with a different value for different employees are marked with an asterisk (*).

4 On the **Work Rules Assignment** screen, define hours, required pay period hours, and pooling rules for the selected employees.

What to do next

Assign work patterns to employees, page 140

Related topics

Work rules assignment details, page 136

Work rules history and current settings, page 138

Required Pay Period Hours, page 140

Work rules assignment details

When defining work rules to employees, there are specific parameters and sections related to each work rule and parameter.

Field	Description
Hours	
Minimum Paid Hours	Defines the least number of paid hours the selected employee can work every week.
Maximum Paid Hours	Defines the most number of paid hours the selected employee can work every week.
Maximum OT Per Day	Defines the most number of overtime hours the selected employee can work every day.

Field	Description
Maximum OT Per Week	Defines the most number of overtime hours the selected employee can work every week.
Maximum VTO Per Day	Defines the most number of voluntary time-off hours the selected employee can work every day.
Maximum VTO Per Week	Defines the most number of voluntary time-off hours the selected employee can work every week.
Minimum Rest Period Per Week	Defines the least number of hours that the selected employee must have continuous, non-working time in the schedule.
Start Date	Defines the date *from which* the work rules are effective for the selected employee.
End Date	Defines the date *until which* the work rules are effective for the selected employee.
Required Pay Period Hours	
Required Hours per Pay Period	Defines the least number of hours the employee is required to work in a pay period.
Start Date	Defines the date *from which* the **Required Hours per Pay Period** setting is effective for the selected employee.
End Date	Defines the date *until which* the **Required Hours per Pay Period** setting is effective for the selected employee.
Pooling Rules NOTE: Pooling Rules are *only* available when assigning work rules on an organizational level for *all* campaigns. They are *not* available when overriding work rules for a specific scheduling period (done using the **Forecasting and Schedule** module).	
Employee Can Pool	Indicates whether the employee is a pooler. A pooler is an employee who works at their primary location with some open slots in their schedule. If other locations demand more employees, this employee can be pooled to work at those secondary locations.
Secondary Organizations	Defines the organizations for which the employee can pool, other than their primary organization.
Minimum Paid Hours in Primary Organization	Defines the least number of paid hours the selected employee need to work in their primary location *before* being pooled to work at other locations.

Field	Description
Start Date	Defines the date *from which* the **Pooling Rules** settings are effective for the selected employee.
End Date	Defines the date *until which* the **Pooling Rules** settings are effective for the selected employee.

Related topics

Select employees and assign initial work rules, page 135
Work rules history and current settings, page 138
Required Pay Period Hours, page 140

Work rules history and current settings

When you select ✎ next to the **Start Date** field under **Hours**, you can edit details related to the current work rules assignment.

The top portion shows the history of work rules assigned to the employee, according to time periods. On the bottom, you can edit the new settings for the current assignment.

Field	Description
Start Date	Defines the date from which the work rules were assigned to the selected employee for the defined time period in the past.
End Date	Defines the date until which the work rules were assigned to the selected employee for the defined time period in the past.
Minimum Paid Hours	Defines the least number of paid hours the selected employee was set to work every week for the defined time period in the past.
Maximum Paid Hours	Defines the most number of paid hours the selected employee was set to work every week for the defined time period in the past.
Maximum OT Per Day	Defines the most number of overtime hours the selected employee was set to work every day for the defined time period in the past.
Maximum OT Per Week	Defines the most number of overtime hours the selected employee was set to work every week for the defined time period in the past.

Field	Description
Maximum VTO Per Day	Defines the most number of voluntary time-off hours the selected employee was set to work every day for the defined time period in the past.
Maximum VTO Per Week	Defines the most number of voluntary time-off hours the selected employee was set to work every week for the defined time period in the past.
Effective Dates	Defines the dates that the work rules are now being assigned to the employee: • **Update value for current period <date range>**: This selection is the default, and replaces the displayed value for the time period that is currently saved. This setting has the same effect as having *no* effective dates and always resets the current value. • **Insert value for period from <date range>**: Allows you to set the new value from the beginning of the period being viewed into the future to a specified date. • **Insert value from <date> forward**: Allows you to set the new value from the beginning of the viewed period into the future, with no specified end date.
Minimum Paid Hours	Defines the least number of paid hours the selected employee can work every week.
Maximum Paid Hours	Defines the most number of paid hours the selected employee can work every week.
Maximum OT Per Day	Defines the most number of overtime hours the selected employee can work every day.
Maximum OT Per Week	Defines the most number of overtime hours the selected employee can work every week.
Maximum VTO Per Day	Defines the most number of voluntary time-off hours the selected employee can work every day.
Maximum VTO Per Week	Defines the most number of voluntary time-off hours the selected employee can work every week.
Minimum Rest Period Per Week	Defines the least number of hours that the selected employee must have continuous, non-working time in the schedule.

Related topics

Select employees and assign initial work rules, page 135

Work rules assignment details, page 136

Required Pay Period Hours, page 140

Required Pay Period Hours

When you select next to the **Start Date** field under **Required Pay Period Hours**, you can edit details related to this setting.

Field	Description
Effective Dates	Defines the dates that the **Required Hours per Pay Period** setting is effective for the selected employee: • **Update value for current period <date range>**: This selection is the default, and replaces the displayed value for the time period that is currently saved. This setting has the same effect as having *no* effective dates and always resets the current value. • **Insert value for period from <date range>**: Allows you to set the new value from the beginning of the period being viewed into the future to a specified date. • **Insert value from <date> forward**: Allows you to set the new value from the beginning of the viewed period into the future, with no specified end date.
Required Hours per Pay Period	Defines the least number of hours the employee is required to work in a pay period.

Related topics

Select employees and assign initial work rules, page 135

Work rules assignment details, page 136

Work rules history and current settings, page 138

Assign work patterns to employees

Assign work patterns to employees, which is a set of shifts. A work pattern includes one or more shifts and possible days off for one week.

The scheduling engine can only schedule employees who have *at least one work pattern* assigned to them. Only work patterns, not individual shifts, are assigned to employees.

Before you begin

Select employees and assign initial work rules, page 135

Procedure

1. From the **Work Rules Assignment** screen, expand **Work Patterns** and select **Add**.
2. From the **Work Pattern** screen, select the work patterns you want to add to the work rules assignment and select **Add Selected Work Patterns**.

   The selected work patterns are added to the work rule assignment.
3. To enter start and end effective dates each work pattern, select next to **Start Date / End Date**.

The system displays a history of the work pattern assignment to the employee. The history includes the dates the work pattern was assigned, and the settings for those time periods.

4 For the current work pattern assignment, enter effective dates and preferences on the bottom half of the **Work Pattern** screen, and select **Set**.

You can also set a preference for the work pattern on the **Work Rules Assignment** screen, if needed.

What to do next

Assign assignment rules to employees, page 142

Related topics

Work patterns history and current settings, page 141
Create a work pattern, page 101

Related information

Work pattern preferences and scheduling (*Workforce Management Forecasting and Scheduling Guide*)

Work patterns history and current settings

When you select next to the **Start Date / End Date** field under **Work Patterns**, you can edit details related to the current work patterns assignment.

The top portion shows the history of work patterns assigned to the employee, according to time periods. On the bottom, you can edit the new settings for the current assignment.

Field	Description
From	Defines the date from which the work pattern was assigned to the employee in the past.
To	Defines the date until which the work pattern was assigned to the employee in the past.
Preferences	Defines the preference of the work pattern over other work patterns assigned to the employee in the past. A value of 1 has the highest preference. Valid values include 1–99.

Field	Description
Effective Dates	Defines the dates that the work pattern is now being assigned to the employee: • **Update value for current period <date range>**: This selection is the default, and replaces the displayed value for the time period that is currently saved. This setting has the same effect as having *no* effective dates and always resets the current value. • **Insert value for period from <date range>**: Allows you to set the new value from the beginning of the period being viewed into the future to a specified date. • **Insert value from <date> forward**: Allows you to set the new value from the beginning of the viewed period into the future, with no specified end date.
Is Work Pattern Assigned?	Indicates whether the work pattern is assigned to the employee. By default, this check box is selected.
Preferences	Defines the preference of the work pattern over other work patterns assigned to the employee. A value of 1 has the highest preference. Valid values include 1–99. Do *not* use both work pattern and start time/day off preferences. The start time/day off preferences take priority over work pattern preferences. If you do *not* want to use work pattern preferences, set the priority of all work patterns to 1 or any other number. This common priority value indicates that one work pattern does *not* have priority over any other work pattern.

Related topics

Assign work patterns to employees, page 140

Related information

Work pattern preferences and scheduling (*Workforce Management Forecasting and Scheduling Guide*)

Assign assignment rules to employees

Assign assignment rules to employees, which *supplement* work patterns. Employees must be assigned at least one work pattern or rotation *before* applying assignment rules for that employee.

Assignment rules are useful for work environments that have complex work rules, rotations, or fairness needs due to employee or union requirements.

Before you begin

Assign work patterns to employees, page 140

> You can *only* add assignment rules to a work rule assignment on an organizational level for *all* campaigns (done using the **User Management** module). You *cannot* add assignment rules for a work rules assignment for a *specific scheduling period only* (done using the **Forecasting and Scheduling** module).

Procedure

1. From the **Work Rules Assignment** screen, expand **Assignment Rules** and select **Add**.
2. From the **Assignment Rule Details** screen, select the assignment rules you want to add to the work rules assignment and select **Add Selected Assignment Rules**.

   The selected assignment rules are added to the work rule assignment. Assignment rules can rotate being active or inactive in different weeks during a specific cycle.
3. To set a recurring pattern for each assignment rule to be active or inactive for each week in the work pattern:
   a. Define the number of weeks of the rotation period where the assignment rule is either active or inactive:
      - From the **Cycle** field, enter a value of 1–26 (weeks).

   b. Indicate in which weeks the assignment rule is active and not active for the set cycle:
      - From the **Pattern** field, for the weeks in which you want the assignment rule to be *active*, select **<number of week> - Not Active**. The value changes to **<number of week> - Active**.

        For example, the cycle is set for five weeks. You want the assignment rule to be active in weeks 1, 3, and 4. From **Pattern**, select **1 - Not Active**, **3 - Not Active** and **4 - Not Active**. These values change to: **1 - Active**, **3 - Active** and **4 - Active**.
      - For the weeks in which you want the assignment rule to be *inactive*, do *not* select those weeks. Those weeks remain with the value, **<number of week> - Not Active**.

   c. Set the number of weeks you are currently into the cycle:
      - From the **Week** field, select the relevant value.

        For example, to indicate that you are currently in the fifth week of the current cycle for the assignment rule, select **5** in this field.

What to do next

Assign rotations to employees, page 145

Related topics

Example: Define cycles for assignment rules, page 144
Create an assignment rule, page 113

Example: Define cycles for assignment rules

When assigning assignment rules to employees, you can define a set number of weeks in a cycle where the assignment rule is either active or inactive.

Scenario: Employee works rotation with weekend hours and non-weekend hours

An employee has been working a 2-week rotation since the beginning of 2018, which alternates between work patterns. One of the work patterns includes possible weekend hours. The other work pattern does *not* include weekend hours.

Recently, the incoming call volumes on weekends have increased significantly. For every employee able to work weekends, impose an assignment rule that specifies they work at least some weekend hours.

This employee works a rotation in which they work weekends *every other week*. Do *not* impose the assignment rule on the employee during weeks that their work pattern does *not* allow weekend work.

Resolution: Use assignment rule in weeks that the work pattern allows weekend work

Set up a recurring pattern for the assignment rule. This pattern uses the assignment rule in weeks that allows weekend work for the employee. Do *not* use the assignment rule in weeks that the work pattern does *not* include weekend work.

Do the following when assigning the assignment rule to the employee:

1. For **Cycle**, select **2**.

   We need to define a two-week recurring pattern for activating and deactivating the rule for this employee.

2. For **Pattern**, select **1-Active**, and leave week 2 as **2-Not Active**.

   Now we set a pattern of alternating weeks that turn the assignment rule on and off.

3. View the current week and see if the rotation this week includes a work pattern with weekend time or not.

   The employee has been working this rotation since the beginning of 2018. Figure out where the employee is in the rotation and line it up with our recurring pattern for the assignment rule.

4. Determine the next step:

   - If the current week in the rotation includes a work pattern with weekend time, set the **Week** field to **1**.

     You want the assignment rule to be active this week in the pattern.

   - If the current week in the rotation does *not include* a work pattern with weekend time, set the **Week** field to **2**.

     You want this week to match up to the *inactive* assignment rule week in our pattern.

     As you change the value in the **Week** field, the value in the **Pattern** field changes to show the selection that matches that week.

     For example, change the value in the **Week** field to **1**. The value in the **Pattern** field changes to **1 - Active**. Change the value in the **Week** field to **2**. The value in the **Pattern** field changes to **2 -Not Active**.

Related topics

Assign assignment rules to employees, page 142

Assign rotations to employees

Assign rotations to employees, which is a specific repeating sequence of work patterns. Rotations *override* work patterns. When rotations are assigned, work patterns that were previously assigned are ignored.

Before you begin

Assign assignment rules to employees, page 142

> You can *only* add rotations to a work rule assignment on an organizational level for *all* campaigns (done using the **User Management** module). You *cannot* add rotations for a work rules assignment for a *specific scheduling period only* (done using the **Forecasting and Scheduling** module).

Procedure

1. From the **Work Rules Assignment** screen, expand **Rotations** and select **Add**.
2. From the **Rotation Details** screen, select the rotation you want to add to the work rules assignment and select **Add Selected Rotation**.

   You can only assign *one rotation at a time to employees*. The selected rotation is added to the work rule assignment.
3. To change the work pattern associated with the rotation, select the work pattern from the **Work Pattern** drop-down list.

What to do next

Assign time banks to employees, page 145

Related topics

Create a rotation, page 110

Assign time banks to employees

Assign time banks to employees, which allow employees to work longer hours during busy times and fewer hours during slower times. Employees bank hours when they work more than usual, and subtract hours when they work less than usual.

Before you begin

Assign rotations to employees, page 145

> You can *only* add time banks to a work rule assignment on an organizational level for *all* campaigns (done using the **User Management** module). You *cannot* add time banks for a work rules assignment for a *specific scheduling period only* (done using the **Forecasting and Scheduling** module).

Procedure

1. From the **Work Rules Assignment** screen, expand **Time Banks** and select **Add**.

2. From the **Time Bank Details** screen, select the time bank you want to add to the work rules assignment and select **Add Selected Time Bank**.

   You can only assign one time bank at a time to employees. The selected time bank is added to the work rule assignment.

   A time bank shares the following three items with the organization to which the time bank is associated: day boundary, time zone and start day. It is *not* possible to assign a time bank to an employee if these items of the time bank do *not* match those of the organization to which the employee belongs.

   If a time bank has been assigned to an employee, and then the employee is transferred to another organization that has a different day boundary, time zone, or start day, the time bank is automatically unassigned for that employee.

What to do next

Review and save assigned work rules, page 146

Related topics

Time banking, page 124

Related information

Time banking scheduling (*Workforce Management Forecasting and Scheduling Guide*)

Review and save assigned work rules

After defining all required work rules to selected employees, it is critical to review and save these settings in the system. These rules and parameters determine how an employee is scheduled.

Before you begin

Assign time banks to employees, page 145

Procedure

1. Review all assigned work rules to the selected employees, and make any required updates.
2. Select **Save**.

   The specified work rules are updated for the selected employees.

Related topics

Workflow: Assign work rules to employees, page 135

File setup screen for imports and exports

When importing and exporting shift events, shifts, work patterns, skills, and VCT arrival patterns, complete the relevant fields on the **File Setup** screen.

Depending on the import or export item, the fields on the **File Setup** screen can vary slightly.

File setup screen for imports

Field	Description
File to import	Path and name of the external file to be imported.
Delimiter	Specifies one of the following as the field delimiter (separator) used in the file: • Tab • Comma (for importing time banks and skills *only*) • Semicolon
Number of lines to ignore at start of file	Specifies the number of lines to ignore at the beginning of the file. This value is useful for data to include in the file, but *not* in the import. For example, use this value for comments about the data in the file.
Import Behavior	Specifies whether you want to add new data, overwrite existing data, or both during the import: • **Add/Update**: Adds any new data to the system and updates or overwrites any existing data. • **Update Only**: Overwrites any existing data *only* to the system, but does *not* add new data. • **Add Only**: Adds new data *only* to the system, but does *not* overwrite any existing data.
Check the fields to import and enter the column number from your file	Allows you to select the fields to be imported, and to specify the number of the column that contains that data of the field. Some fields are mandatory for the import, and those fields are automatically selected and *cannot* be unselected. For shift events, you must import the **Shift Event**, **Activity**, and **Length** fields. However, you can determine whether to import the **Start Time Type**, **Paid** and **Flexible** fields. Specify the number of the column from the file for every field. For example, if **Length** is the third column, enter **3** for the **Length** field.

File setup screen for exports

Field	Description
Delimiter	Specifies one of the following as the field delimiter (separator) used in the file: • Tab • Comma (for exporting time banks *only*) • Semicolon

Related topics

Export shift events, page 84

Import shift events, page 84

Export shifts, page 91

Import shifts, page 92

Export work patterns, page 170

Import work patterns, page 109

Export time banks, page 133

Import time banks, page 124

Export skills, page 153

Import skills, page 152

Import a VCT arrival pattern, page 40

Employee settings

Create and assign skills to employees, set employee preferences, and create staffing profiles.

Topics

Workflow: Set up skills

Create skills that parallel the skills needed to deal with the workload, and then link employees to skills.

> Skills are required for skill-based scheduling. If you are *not* performing skill-based scheduling, you do *not* need to create skills.

Workflow

1. Create a skill, page 150 or Import skills, page 152

   You can import skills or manually create skills in the system.
2. Assign a skill to employees, page 154

   After creating a skill or importing skills, assign a skill to employees.
3. The remaining steps are completed in the **Forecasting and Scheduling** module and include the following steps:

   a. Create a skill-based scheduling period.

   b. Link skills to work queues.

   c. Generate a schedule for a skill-based scheduling period.

Related topics

Example: skill-based scheduling in call centers, page 161

Edit a skill, page 151

Copy a skill, page 152

Export skills, page 153

Related information

Skill-based scheduling (*WFM Forecasting and Scheduling Guide*)

Create a skill

Create a skill for an organization by entering it manually in the system.

Procedure

1. Go to **Organization Management**. Under **Employee Attributes**, select **Skills**.
2. Select **Create Skill**.
3. Complete the fields on the **Skill** screen, and select **Save**.

What to do next

Assign a skill to employees, page 154

Related topics

Skill details, page 151

Import skills, page 152

Skill details

When creating or editing a skill, define or update data about the skill.

Field	Description
Organization Name	Specifies the name of the organization for which the skill is created. Select an organization that is in the right place in the organization hierarchy. The higher the organization, the more universal the skill is. You can modify organizations for both skills and work queues.
Name	Defines the name of the skill. For example: *French Billing Service*, *Customer Service*, *Spanish - Phone*
Description	Optional: Describes the skill. For example: *Fluent to proficient Spanish-language speaking and comprehension to answer calls and communicate to customers in Spanish*.
Media Type	Defines the media required for the skill (same list as work queues). For example: **Phone**, **Email**, **Fax**, **Chat**, **Social Post**, **Callback**, **Face-to-Face**, **Operations**, **Project**.

Related topics

Create a skill, page 150

Edit a skill, page 151

Edit a skill

To modify the attributes of a skill, you can edit it.

Procedure

1. Go to **Organization Management**. Under **Employee Attributes**, select **Skills**.
2. From the left pane, select the organization for which the skill was created.

   Select the same organization displayed in the **Organization** column for the skill to edit it. Otherwise, the **Edit Skill** option is *not* available.
3. From the **Skill** screen, select the skill you want to edit, and select **Edit Skill**.
4. On the **Skill** screen, edit any relevant fields and select **Save**.

Related topics

Skill details, page 151

Delete skills, page 173

Copy a skill

Copy a skill for an organization.

Procedure

1 Go to **Organization Management**. Under **Employee Attributes**, select **Skills**.

2 From the left pane, select the organization from which you want to copy the skill.

Select the same organization displayed in the **Owner Organization** column for the skill to copy it. Otherwise, the **Copy** option is *not* available.

3 From the **Skill** screen, select the skill you want to copy and select **Copy Skill**.

4 On the **Copy Skill** screen, select the organization to which you want to copy the skill and select **Copy to Selected Organization**.

A message appears, stating: **Instruction: Copied Successfully: [Name of Organization]**.

5 Select **Done**.

6 From the left pane, select the organization for which you copied the skill.

The skill is copied on the **Skill** screen for the selected organization with the name: **Copy of <name of skill>**.

7 To rename the copied skill for the selected organization:

a. Select the skill and select **Edit Skill**.

b. In the **Name** field, edit the name and select **Save**.

Related topics

Skill details, page 151

Edit a skill, page 151

Import skills

You can import skills into the WFO system.

Before you begin

Export skills, page 153

Procedure

1 Go to **Organization Management**. Under **Employee Attributes**, select **Skills**.

2 Select the organization for which you want to import skills.

3 Select **Import Skills**.

4 On the **File Setup** screen, complete the fields.

5 Select **Import**.

The system imports the skills accordingly. It is populated as specified on the **Skill** screen.

What to do next

Assign a skill to employees, page 154

Related topics

File setup screen for imports and exports, page 147

Export skills

Export all skills from the WFO system to an external file.

If you want to store data on your hard drive, or want to make multiple updates using a data file, you can export skills. Once you make your updates, import them back into the system.

Procedure

1. Go to **Organization Management**. Under **Employee Attributes**, select **Skills**.
2. Select **Export Skills**.
3. In the **Delimiter** field, select one of the following as the field delimiter (separator) used in the file:
   - Tab
   - Comma
   - Semicolon
4. Select the organizations from which you want to export skills, and select **Export**.
5. From the **Save** drop-down list, select **Save as**.
6. Type a name for the file (such as **Skills**) and save the file with a .txt file name extension in a specified location.
7. Select **Save** and **Open**.

The file looks similar to the following:

	A	B	C	D
1	Skill Name	Media Type	Description	Organization Name
2	Customer Service	Phone		.Verint
3	English Billing Service	Phone		.Verint
4	Sales - Phone	Phone		.Verint
5	French Billing Service	Phone		.Verint
6	Sales	Phone		.Verint
7	Service	Phone		.Verint
8	Phone Outbound	Phone		.Verint
9	BUR Group 3 New Claims	Phone		.Verint
10	Banking New	Phone		.Verint
11	NascoHomeEdit	Phone		.Verint
12	BUR Group 2 English	Phone		.Verint
13	BUR Group 3 English	Phone		.Verint
14	BUR Group 1 Spanish	Phone		.Verint
15	BUR Group 2 Spanish	Phone		.Verint
16	BUR Group 3 Spanish	Phone		.Verint
17	BUR Group 3 Agt HL	Phone		.Verint
18	MedGrp_PediatricsSpanish	Phone		.Verint
19	Mortgage	Phone		.Verint

8 From the **Export Skills** screen, select **Done**.

Related topics

File setup screen for imports and exports, page 147

Import skills, page 152

Assign a skill to employees

After creating a skill or importing skills, assign the skill to employees.

Before you begin

Create a skill, page 150or Import skills, page 152

Procedure

1 Determine the scope of the skill assignment:

- To assign a skill for *all* campaigns, go to **User Management**. Under **Employees**, select **Skills**.
- To assign a skill for a *specific* campaign, go to **Forecasting and Scheduling**. Under **Employees**, select **Skills**.

2 Do one of the following:

- If you are assigning a skill for *all* campaigns from the **User Management** module, from the left pane, set the filters to display the employees for which you want to assign a skill.

- If you are assigning a skill for a *specific* campaign from the **Forecasting and Scheduling** module, from the left pane, select the *campaign* and *scheduling period*, and set the filters to display the employees for which you want to assign a skill.

3 From the left pane, select one or more employees for which you want to assign skills.

The Skills Assignment screen lists the current skills assigned to the selected employees.

4 To add a skill for the employees, under **Assigned**, select **Add**.

5 Select the skills you want to assign to one or more employees, and select **Add Selected Skills**.

The system populates the skills on the **Skills Assignment** screen, under **Assigned**.

6 To enter data about the skill assignment, select the **Edit** icon next to **Start Date / End Date**.

The system displays a history of the skill assignment to the employee. The history includes the dates the skill was assigned, and the settings for those time periods.

7 For the current skill assignment, complete the fields on the bottom half of the **Skill** screen, and select **Set**.

8 On the Skills Assignment screen, select **Save**.

Related topics

Skills assignment details, page 156

Skill history and current settings, page 158

Skill proficiencies and priorities, page 160

Related information

Assign campaign-specific settings to employees (*Workforce Management Forecasting and Scheduling Guide*)

Skills assignment details

When assigning skills to employees, you need to enter specific data about the skill assignment.

Field	Description
Proficiency	Defines a value for the general work proficiency level of one or more selected employees, using the following scale: • **0.5**: Employee is *above average* at work. It takes them half as long as the defined Average Handle Time (AHT) to complete their work. The system considers this value as the work of two employees. • **1.0**: Employee is *average* at work. They complete their work within the Average Handle Time (AHT). The system considers this value as the work of one employee. • **2.0**: Employee is *below average* at work. It takes them twice as long as the defined Average Handle Time (AHT) to complete their work. The system considers this value as the work of one half of an employee. The proficiency level is used in creating skill-based schedules.
Number of Chat Sessions	Defines the number of simultaneous chat sessions assigned to the employee.
Assigned	
Skill	Defines the name of the skill assigned to the employee.
Start Date / End Date	Defines the dates for which the skill is effective for the employee. For example, you want to define the specified skill, Mortgage Consulting, to an employee for a specific campaign. Specify that this skill is effective for the employee for the two-week period, 3/1 to 3/15.

Field	Description
Proficiency	Defines the numeric value for the proficiency level of one or more selected employees *in the skill*, using the following scale: • **0.5**: Employee is *above average* in this skill. It takes them half as long as the defined Average Handle Time (AHT) to complete their work using this skill. The system considers this value as the work of two employees. • **1.0**: Employee is *average* in this skill. They complete their work using this skill within the Average Handle Time (AHT). The system considers this value as the work of one employee. • **2.0**: Employee is *below average* in this skill. It takes them twice as long as the defined Average Handle Time (AHT) to complete their work using this skill. The system considers this value as the work of one half of an employee. *Skill* proficiencies override *general* proficiencies defined for the employee.
Priority	Defines the priority of the skill for the employee, which is linked to a work queue. This setting determines how interactions or units of work are routed to employees: • In call centers, the priority of the skill matches the ACD priority routing (1=highest priority). • In an Operations environment, the priority of the skill matches the unit of work routing (1=highest priority). The work queue linked to the skill with a priority *1* is the *primary* queue. The work queue linked to the skill with a priority *2* is the *secondary* queue.

Field	Description
Classification	Defines the grouping of the skill for employees as either their *primary* or *reserve* skill. This grouping allows you to achieve your service goals by taking advantage of a larger pool of eligible employees when increased efficiency is needed. At all other times, employees remain dedicated to their primary skill. Possible values include: • **Primary Skill**: Classifies the skill as being the *primary* skill of the employee. Employees are dedicated to this skill during a usual business workload. • **Reserve 1**: Classifies the skill as being the *first* reserve skill of the employee. During peak business hours, when more employees are needed to cover the workload than usual, the schedule can include employees with skills set to Reserve 1. • **Reserve 2**: Classifies the skill as being the *second* reserve skill of the employee. During peak business hours, when more employees are needed to cover the workload than usual, the schedule can include employees with skills set to Reserve 2.

Related topics

Assign a skill to employees, page 154

Skill history and current settings, page 158

Skill proficiencies and priorities, page 160

Skill history and current settings

When you select next to the **Start Date** field on the Skills Assignment screen, you can edit details related to the current skills assignment.

The top portion shows the history of skills assigned to the employee, according to defined time periods. On the bottom, you can edit the new settings for the current assignment.

Field	Description
From	Defines the date from which the skill was assigned to the employee in the past.
To	Defines the date until which the skill was assigned to the employee in the past.
Proficiency	Defines the skill proficiency level for the employee that was set for the defined time period.

Field	Description
Priority	Defines the priority of the skill for the employee that was set for the defined time period.
Classification	Classifies the skill for the employee that was set for the defined time period.
Effective Dates	Defines the dates that the skill is now being assigned to the employee: • **Update value for current period <date range>**: This selection is the default, and replaces the displayed value for the time period that is currently saved. This setting has the same effect as having *no* effective dates and always resets the current value. • **Insert value for period from <date range>**: Allows you to set the new value from the beginning of the period being viewed into the future to a specified date. • **Insert value from <date> forward**: Allows you to set the new value from the beginning of the viewed period into the future, with no specified end date.
Is Skill Assigned?	Indicates whether the skill is assigned to the employee. By default, this check box is selected.
Proficiency	Defines the numeric value for the proficiency level of one or more selected employees *in the skill*, using the following scale: • **0.5**: Employee is *above average* in this skill. It takes them half as long as the defined Average Handle Time (AHT) to complete their work using this skill. The system considers this value as the work of two employees. • **1.0**: Employee is *average* in this skill. They complete their work using this skill within the Average Handle Time (AHT). The system considers this value as the work of one employee. • **2.0**: Employee is *below average* in this skill. It takes them twice as long as the defined Average Handle Time (AHT) to complete their work using this skill. The system considers this value as the work of one half of an employee. *Skill* proficiencies override *general* proficiencies defined for the employee.

Field	Description
Priority	Defines the priority of the skill for the employee, which is linked to a work queue. This setting determines how interactions or units of work are routed to employees: • In call centers, the priority of the skill matches the ACD priority routing (1=highest priority). • In an Operations environment, the priority of the skill matches the unit of work routing (1=highest priority). The work queue linked to the skill with a priority *1* is the *primary* queue. The work queue linked to the skill with a priority *2* is the *secondary* queue.
Classification	Defines the grouping of the skill for employees as either their *primary* or *reserve* skill. This grouping allows you to achieve your service goals by taking advantage of a larger pool of eligible employees when increased efficiency is needed. At all other times, employees remain dedicated to their primary skill. Possible values include: • **Primary Skill**: Classifies the skill as being the *primary* skill of the employee. Employees are dedicated to this skill during a usual business workload. • **Reserve 1**: Classifies the skill as being the *first* reserve skill of the employee. During peak business hours, when more employees are needed to cover the workload than usual, the schedule can include employees with skills set to Reserve 1. • **Reserve 2**: Classifies the skill as being the *second* reserve skill of the employee. During peak business hours, when more employees are needed to cover the workload than usual, the schedule can include employees with skills set to Reserve 2.

Related topics

Assign a skill to employees, page 154

Skills assignment details, page 156

Skill proficiencies and priorities, page 160

Skill proficiencies and priorities

A skill *proficiency* defines how proficient the employee is in that specific skill. A skill *priority* is linked to the work queue, and determines how the system routes the interaction or unit of work (in Operations) to the employee.

Example: Setting a skill proficiency level for an employee

You assign John Smith, an employee, with a general proficiency of 1.0. John is *average* at work, completing the workload within the Average Handle Time (AHT).

You assign the employee with the skill, **French**, a language in which the employee is fluent. You define the skill proficiency level in **French** to be **0.5**, as the employee is *above average* in this skill. Therefore, the proficiency of **0.5** in **French** *overrides* the work proficiency of **1.0**.

Skill priorities

Note the following about setting priorities for skills:

- If there are *no* priorities or if *all* skills have the *same* priority, the system routes the work to the next available employee.
- If *two or more* employees are available, the interaction or unit of work is assigned to the employee with the *highest* priority skill.
- An employee with two or more skills is the only available employee. There is pending work from more than one queue. The work from the highest priority queue for the employee determines which one is routed to them.

> Priorities are just one of several factors used to route work. Other factors include the length of time work is pending, and the time an employee last received an interaction or unit of work.

Related topics

Skills assignment details, page 156

Assign a skill to employees, page 154

Skill history and current settings, page 158

Example: skill-based scheduling in call centers

For example, in a call center, you have English, French, and Spanish-speaking customers. Therefore, create English, French, and Spanish language skills in the system. Then, assign the relevant skills to the qualified employees accordingly.

You have the following employees with the following qualifications:

- **Employee A** speaks Spanish on a mother-tongue language level and has proficient knowledge of English.
- **Employee B** speaks English on a mother-tongue language level and has proficient knowledge of French.
- **Employee C** speaks French on a mother-tongue language level, has a high-level knowledge of Spanish, and proficient knowledge of English.

You assign skills accordingly to the employees:

- **Employee A**: Spanish with a priority of 1, and English with a priority of 2
- **Employee B**: English with a priority of 1, and French with a priority of 2
- **Employee C**: French with a priority of 1, Spanish with a priority of 2 and English with a priority of 3

The calls are routed accordingly:

1. A Spanish-speaking customer calls.

2 If **Employee A** is available, the call is routed to **Employee A**.
3 If **Employee A** is handling another interaction and cannot take the call, the call is routed to **Employee C**.
4 A French-speaking customer calls.
5 As **Employee C** is handling another interaction, the call is routed to **Employee B**.

Related topics

Workflow: Set up skills, page 150
Example: skill-based scheduling in back office environments, page 162

Example: skill-based scheduling in back office environments

As in a call center, skills are also useful in back office environments to route the appropriate work to the employees with the relevant skills.

For example, in a back office environment, you have three main types of work:

- Research
- Investigation
- Data entry

You have the following employees with the following qualifications:

- **Employee A** is a researcher and detail-oriented.
- **Employee B** is good at troubleshooting and problem-solving, and delves into every customer case with a deep level of detail.
- **Employee C** is organized and meticulous and also does research.

You assign skills accordingly to the employees:

- **Employee A**: Research with a priority of 1, and Data Entry with a priority of 2
- **Employee B**: Investigation with a priority of 1, and Research with a priority of 2
- **Employee C**: Data Entry with a priority of 1, and Research with a priority of 2

The work assignments are done accordingly:

1 Two customer cases come in that require research, and one case involves some investigation into the issue.
2 If Employee A is available, one of the research cases goes to Employee A.
3 The second research case can go to Employee C.
4 The investigative case can go Employee B.

Related topics

Workflow: Set up skills, page 150
Example: skill-based scheduling in call centers, page 161

Employee preferences

Employee preferences are general scheduling preferences, and are not related to a specific week or scheduling period.

Many factors contribute to how the final schedule is created. Preferences are *not* guarantees. When you generate the schedule, specify whether to consider preferences and how - by rank or seniority. You can also determine whether to favor service level over preferences.

Example: Employee preferences

The following are examples of employee preferences:

- John Smith prefers to work overtime after his regular shift, but not before.
- Lynn Jones prefers to have Tuesday and Wednesday defined as the weekend.
- Joe Klein prefers to have Monday as a day off.
- George Stein prefers earlier shifts.

Related topics

Define employee preferences, page 163

Define employee preferences

For a specific employee, set employee preferences on how they are scheduled.

Procedure

1 Go to **User Management**. Under **Employees**, select **Schedule Preferences**.

2 From the left pane, select one or more employees for which you want to set preferences.

3 Define the **Start Time Preference** for the selected employees:

   a. For the **First Preference** for each day of the week, select , select the desired time range, and select **Set**.

   b. For the **Second** and **Third Preference**, repeat step a

   c. Indicate whether you want to start early or late:

      - No preference
      - Early
      - Late

> Do *not* use both work pattern and start time/day off preferences. The start time/day off preferences take priority over work pattern preferences. If you do *not* want to use work pattern preferences, set the priority of all work patterns to 1 or any other number. This common priority value indicates that one work pattern does *not* have priority over any other work pattern.

4 Define the **Day Off Preference** for the selected employees:

   a. From the **Week Day** column, select the day you want and select **Assign right** to move the day under **Preference**.

   b. For all preferred days off, repeat step a

c. Under **Preference**, use **Assign up** and **Assign down** to sort the days in the preferred order.

For example, if you prefer Monday over Sunday for the preferred day off, select **Monday** and select **Assign up** until Monday is above Sunday.

d. Indicate whether start time is more important than day off preference for the selected employees:

- Days off preferences are more important than start time
- Start time preferences are more important than day off
- They are equally important

5 For **Over Time and Voluntary Time Off Preference** for the selected employees, select **No Preference**, **Prefer**, or **Do not prefer** for the following:

- **Over Time Before Shift**
- **Over Time After Shift**
- **Voluntary Time Off at Shift Start**
- **Voluntary Time Off at Shift End**

6 Select **Save**.

The system updates the preferences you specified for the selected employees.

Related topics

Employee preferences, page 163

Work rules assignment details, page 136

Staffing profiles

Staffing profiles allow you to evaluate alternative staffing plans and project future staffing needs.

Staffing profiles can be used for the following purposes:

- **Basic headcount planning**: The scheduling engine can be used to schedule both actual employees and staffing profiles together.
- **Fixed schedules for current staff**: Some companies operate with employees on fixed schedules with specific times when employees are unavailable to work. To determine the number of employees needed in the future, consider the number of current employees. Staffing profiles allow adding profile schedules to your existing employee schedules, which help determine the new set of schedules for which employees are hired. It also helps determine how many existing employee schedules to leave intact.
- **Determining outsourcing needs**: Many companies consider adding outsourcers to help meet peak volumes. By scheduling its current employees along with staffing profiles, managers determine how many outsourcers to hire and at which times. Outsourcers help offload needs during drastic seasonal changes. In addition, they help predict staffing costs so that a more accurate bid can be submitted to a potential customer.
- **Schedules for Shift Bidding**: Staffing profiles can be used to create schedules to be placed in auctions. As employees bid and receive shifts, real employees replace the profiles.

Related topics

Create a staffing profile, page 165

Edit a staffing profile, page 167

Copy a staffing profile, page 168

Delete a staffing profile, page 168

Create a staffing profile

To evaluate alternative staffing plans and project future staffing needs, create a staffing profile.

You can create a staffing profile for each type of employee, which describes the type of employee needed, their work patterns and skills.

Only one profile is needed for each type of employee. The scheduling engine automatically creates the correct number of each type of employee, according to your scheduling requirements. Define the percentage of each type of staffing profile for a specified scheduling period. (For example, you can define a 30% full-time profile and a 70% part-time profile.)

Procedure

1. Go to **User Management**. Under **Staffing Profile**, select **Staffing Profile**.
2. From the left pane, select the organization to which you want to associate the staffing profile.
3. Select **Create**.
4. On the Staffing Profiles screen, complete the fields.
5. To add assignment rules to the staffing profile:
    a. Under **Assignment Rules**, select **Add**.

b. From the **Assignment Rules** screen, select the assignment rules you want to add to the staffing profile and select **Add Selected Assignment Rules**.

The selected assignment rules are added to the staffing profile.

6 To add skills to the staffing profile:

a. Under **Skills**, select **Add**.

b. From the **Skills** screen, select the skills you want to add to the staffing profile and select **Add Selected Skills**.

The selected skills are added to the staffing profile.

Related topics

Staffing profile details, page 166

Edit a staffing profile, page 167

Create an assignment rule, page 113

Create a skill, page 150

Staffing profile details

When creating or editing a staffing profile, define or update data about the staffing profile.

Field	Description
Name	Defines the name of the staffing profile.
Work Pattern	Defines the work pattern assigned to the staffing profile. When you generate a schedule using this staffing profile, the shifts and times are selected using this work pattern.
Wage	Defines the average salary for this staffing profile.
Organization	Defines the organization associated with this staffing profile.

Field	Description
Proficiency	Defines the required work proficiency level for the staffing profile: • **0.5**: Employee is *above average* at work. It takes them half as long as the defined Average Handle Time (AHT) to complete their work. The system considers this value as the work of two employees. • **1.0**: Employee is *average* at work. They complete their work within the Average Handle Time (AHT). The system considers this value as the work of one employee. • **2.0**: Employee is *below average* at work. It takes them twice as long as the defined Average Handle Time (AHT) to complete their work. The system considers this value as the work of one half of an employee. The proficiency level is used when scheduling profiles for skill-based schedules.
Chat Sessions	Defines the number of simultaneous chat sessions assigned to the staffing profile.
Assignment Rules	Defines the assignment rules associated with this staffing profile.
Skills	Defines the skills associated with this staffing profile.

Related topics

Create a staffing profile, page 165

Edit a staffing profile, page 167

Edit a staffing profile

To modify the attributes of a staffing profile, you can edit it.

Procedure

1. Go to **User Management**. Under **Staffing Profile**, select **Staffing Profile**.
2. From the left pane, select the organization for which the staffing profile was created, and select **Edit**.

   Select the same organization displayed in the **Organization** column for the shift to edit it. Otherwise, the **Edit** option is *not* available.
3. On the **Shifts** screen, edit any relevant fields and select **Save**.

Related topics

Staffing profile details, page 166

Copy a staffing profile

You can copy a staffing profile.

Procedure

1. Go to **User Management**. Under **Staffing Profile**, select **Staffing Profile**.
2. From the left pane, select the organization from which you want to copy the staffing profile.

   Select the same organization displayed in the **Organization** column for the staffing profile to copy it. Otherwise, the **Copy** option is *not* available.
3. From the **Staffing Profiles** screen, select the staffing profile you want to copy and select **Copy**.

   The staffing profile is copied to the **Staffing Profiles** screen with the name: **Copy of <name of staffing profile> 1**.
4. To rename the copied staffing profile for the selected organization:
   a. Select the staffing profile and select **Edit**.
   b. In the **Name** field, edit the name and select **Save**.

Example: Copy staffing profile

1. You copy the staffing profile, **Profile FT 8.5 hr**, for the **Chicago** organization.
2. The name of the copied staffing profile is **Copy of Profile FT 8.5 hr**.
3. Select **Copy of Profile FT 8.5 hr** and select **Edit**.
4. Rename the staffing profile to: **Profile FT 8.5 hr 2**.

Related topics

Staffing profile details, page 166

Delete a staffing profile

If required, you can delete a staffing profile for an organization.

Procedure

1. Go to **User Management**. Under **Staffing Profile**, select **Staffing Profile**.
2. From the left pane, select the organization for which you want to delete the staffing profile.

   Select the same organization displayed in the **Organization** column for the staffing profile to delete it. Otherwise, the **Delete** option is *not* available.
3. From the **Staffing Profiles** screen, select the staffing profile you want to delete and select **Delete**.
4. To confirm the deletion, select **OK**.

Related topics

Create a staffing profile, page 165

Cleaning up skills, work rules, and queues

When you no longer require specific WFM entities (such as skills, work rules and work queues), you can remove them from the system. Removing each entity requires specific steps and has specific implications.

Topics

Workflow: Delete work rules

If you no longer require a work rule, you can delete it from the system. There is a specific workflow for deleting any relevant work rule.

Before you begin

- Verify that the work rule you want to delete is *not* linked to any active employees, schedules, or scheduling periods.
- If WFM Ad Hoc Reports are available, you can create reports for employee work patterns and shifts.

> If you delete a campaign and its scheduling periods, the deletion is permanent. No warnings are provided when you delete these entities. The deletion impacts Queue Analytics statistics, other data elements, and reporting. If historical data is a requirement, actual data is stored in a central repository outside the Verint solution.

> When deleting work rules, start with the smallest organization to understand the overall impact before proceeding with the deletion. Only consider deletion if you are sure that you no longer require the work rule.

Workflow

1 Export work patterns, page 170

Before deleting work patterns, export them from the appropriate root or leaf organizations to identify the work pattern planned for deletion.

2 Delete work patterns, page 171

After exporting the relevant work pattern, you can delete it.

3 Delete shifts, page 171

If specific shifts are no longer required, you can delete them.

4 Delete shift events, page 172

If specific shift events are no longer required, you can delete them.

Export work patterns

Before deleting work rules, export work patterns from the appropriate root or leaf organizations to identify the work pattern planned for deletion.

> If work patterns are linked to the root, and several leaf organizations, you must perform an export from each organization.

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Work Patterns**.
2. Select the relevant organization.
3. Select **Export**.

4 On the **File Setup** screen, select **Tab** for the **Delimiter** and select **Export**.
5 From the **Save** drop-down list, select **Save as**.
6 Type a name for the file, and open or save it as a text file (for example, **WorkPatterns.txt**).

> Although you can use Excel to view work pattern exports, it is safer to use a text editor (such as Notepad). Excel might convert the data into the wrong format (for example, integers into dates).

7 When the system displays a message, stating that the file could be corrupted or unsafe, select **Yes** to open the file anyway.

Delete work patterns

After exporting the relevant work pattern, you can delete the work pattern and its associated work rules.

Before you begin

Export work patterns, page 170

Procedure

1 Go to **Work Administration**. Under **Work Rules**, select **Work Patterns**.
2 Select the relevant organization that owns the work rules.
3 Select the work pattern to be deleted, and select **Edit**.
4 Below the **Work Days / Consistency** area, select the linked shifts and select **Remove**.
5 If applicable, below the **VTO Events** and **OT Extension** areas, select the linked events and select **Remove** for each one.
6 Select **Save**.
7 Select the work pattern again, and select **Delete**.
8 When the system prompts you to proceed with the delete, select **OK**.
9 For every work pattern you want to delete, repeat step 3-step 7.
10 Verify whether the work patterns you want to delete are included in rotations and associated with staffing profiles. If they are, remove them accordingly.

What to do next

Delete shifts, page 171

Related topics

Workflow: Delete work rules, page 170

Delete shifts

If specific shifts are no longer required, you can delete them.

Before you begin

Delete work patterns, page 171

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Shifts**.
2. Select the shift you want to delete and select **Edit**.
3. Under **Shift Events**, select the linked shift events and select **Remove** for each one.
4. Select **Save**.
5. Select the shift you want to delete again and select **Delete**.
6. When the system prompts you to proceed with the delete, select **OK**.
7. For every shift you want to delete, repeat step 2-step 5

What to do next

Delete shift events, page 172

Related topics

Workflow: Delete work rules, page 170

Delete shift events

If specific shift events are no longer required, you can delete them.

Before you begin

Delete shifts, page 171

Procedure

1. Go to **Work Administration**. Under **Work Rules**, select **Shift Events**.
2. Select the shift event you want to delete and select **Edit**.
3. Under **Additional Activities (Enabled if shift event is flexible)**, select the linked activities and select **Remove** for each one.
4. Select **Save**.
5. Select the shift event you want to delete again and select **Delete**.
6. When the system prompts you to proceed with the delete, select **OK**.
7. For every shift event you want to delete, repeat step 2-step 5.

Related topics

Workflow: Delete work rules, page 170

Delete skills

If specific skills are no longer required, you can delete them.

Deleting skills impacts past and future scheduling periods, and other statistics, including, but not limited to, service level.

Before you begin

- Export the skills you want to delete from the appropriate root or leaf organizations - see Export skills, page 153
- If WFM Ad Hoc Reports are available, you can create reports for employee work patterns and shifts.

Procedure

1. Go to **Organization Management**. Under **Employee Attributes**, select **Skills**.
2. From the left pane, select the relevant organization.
3. From the right pane, select the skill you want to delete.
4. Select **Delete Skill**.

   The following message appears:

   The skill will also be unlinked from employees and work queues. Schedules in the past or future scheduling periods that link to such employees or work queues may not be valid. Do you want to proceed?
5. Select **OK**.

Related topics

Create a skill, page 150

Delete work queues, page 174

Workflow: Delete work rules, page 170

Delete work queues

If specific work queues are no longer required, you can delete them.

Deleting work queues removes all historical data. After deleting them, this data is *no longer available* for viewing and reporting. Any reports linked to this pertinent data could potentially impact the integrity of reports.

Before you begin

If the goal is to manage user display, do the following *instead of* deleting the work queue:

1. Rename the work queue.
2. Create a suborganization called **Old Queue**.
3. Verify that the **Old Queue** organization is only visible to users with appropriate access rights. It should *not* be visible to most users.
4. Move the work queue to the **Old Queue** organization.

   Changing the work queue from one organization to a different one does *not* delete the historical data. The data is just moved to the new organization.

   If you still want to permanently delete the work queue, follow the steps under **Procedure**.

Procedure

1. Log on the WFO Portal as an **Administrator**.
2. Go to **Work Administration**. Under **Work Queues**, select **Work Queue Group Mapping**.
3. From the left pane, select the relevant organization.
4. From the right pane, select the queue you want to delete.
5. Select **Edit work queue**.
6. On the **Work Queue Group Mapping** screen, move the **Mapped Data Source Groups** back to the **Available Data Source Groups**:
   a. Select the mapped data source group.
   b. Select **Assign left** to move the **Mapped** group back to the **Available** group.
   c. Repeat step a-step b for every mapped data source group.
   d. Select **Save Mapping**.

      This action unlinks all mapped data source groups from the work queue *before* you delete it.
7. To delete the work queue, back on the main screen, select **Delete work queue**.
8. For every work queue you want to delete, repeat step 3-step 7.

Related topics

Create a normal work queue, page 20

Workflow: Delete work rules, page 170

Delete skills, page 173

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