MT SaaS WFM

Employee Guide

Version 15.2
Document Revision 1.00

VERINT®

Document Revision 1.00
Published July 17, 2019

Customer Engagement Solutions™

Contents

About this guide

The *Workforce Management Employee Guide* provides detailed information on how you can use Workforce Management for activities relating to your schedule, time off, and changes to your shifts.

Intended audience

This guide is designed for employees using Workforce Management.

Documentation feedback

We strive to produce the highest-quality documentation products and welcome your feedback. If you have comments or suggestions about our guides or help, you can email us. With your feedback, include the following information:

- Document name and revision number or title of help topic and product version
- Your suggestion for correcting or improving the documentation

Send your messages to userguides@verint.com.

The email address is only for documentation feedback. If you have a technical question, contact Technical Support.

Technical support

Our goal at Verint Systems is to provide you with the best products backed by a high-quality support network with various resource options. Verint Systems Technical Support services include email and telephone support.

To learn more about the support options that best suit your needs, visit us at Customer Engagement Support.

Verint University

In addition to documentation, help, and support services, Verint Systems also offers both classroom-based and online learning alternatives to suit your specific needs.

To learn more about available training options from Verint Systems, visit us at verint.com/training.

Document revision history

Revision	Description of changes
1.00	Initial publication. Formally known as the WFM User Guide.

Introduction

The Workforce Management Employee Guide shows how you can manage your schedule, time off, requests, and personal information.

Within the My Home section, you can do the following:

- View and manage your schedule
- Manage your time off
- Schedule requests
- Track your time
- Track your workload
- Review and change your personal information

Topics

Employee Guide overview

Workforce Management (WFM) allows you to view, and manage your personal details and requests. You can request time off, change your shift, and participate in shift swaps. You can also use Workforce Management to view your scheduled activities for the day, and check how well you are adhering to your assigned schedule.

Viewing and managing your schedule

Provides an overview of your upcoming work, and enables you to change shift requests. Also allows you to plan time off.

In **Viewing and managing your schedule**, you can do the following:

- View a summary of your schedule for the current week.
- View your time off for the year.
- View your schedule, and the schedule for your group in various formats.
- Manage shift swaps, voluntary time off, and shift changes.

Managing your requests

Provides a list of your outstanding requests, and allows you to create time off or shift requests based on your schedule.

In **Managing your requests**, you can do the following:

- Request time off, shift swaps, and shift changes.
- View the time off calendar.
- View your time off report.
- View the swap board.
- View your bid options.
- View any policies relating to shift requests in your workplace.

Tracking your time

Tracks your scheduled activities throughout the day, and allows you to see how well you adhere to your activity schedule.

In **Tracking your time**, you can do the following:

- View your scheduled activities for a shift.
- Record your actual activities for a shift.
- View a history of your actual activities.

Tracking your workload

Tracks your upcoming tasks, and allows you to view a history of your previous workload.

In **Tracking your workload**, you can do the following:

- View work items that have been assigned to you.
- Track your workload.
- View a history of your workload.

Setting your personal information

Allows you to change your personal details, and manage your shift preferences for upcoming work.

In **Setting your personal information**, you can do the following:

- Check, and amend your personal information.
- Change your password.
- Specify your shift preferences.

Viewing and managing your schedule

View your own work schedule, and the schedule of your group. You can choose to view schedules in a textual, graphical, or multiday format. Information from upcoming schedules can be used to request shift extensions, request time off, and to swap your shifts with other employees.

Topics

View a summary of your schedule

To view your schedule for the current week and time off summary information for the year, view a summary of your schedule. Required Pay Period Hours, Shift Swap, and Shift bidding sections are available when set up. The Time Banking section is available to view when you have been assigned to a time bank.

Procedure

1 Go to **My Home**. Under **My Schedule**, select **Summary**.

2 Optional: Do the following:

- To view your time off summary for another year, use the arrows to select from the list.
- To see if any changes occurred while viewing this page, select **Refresh**.

Related topics

My Schedule Summary page, page 12

Calculate time off accrual, page 35

My Schedule Summary page

This page provides your schedule for the current week and time off summary information for a selected year. When applicable, summary information is available for shift swap, shift bidding, and time banking. In addition, you can access the Time Off Accrual Calculator to view your available time off.

This Week's Schedule section

Column	Description
This Week's Schedule	Displays schedule summary for the week. If schedule is unpublished, **Not Published** is displayed.

Time Off Summary section

Column	Description
Time Off type	Time off or activity type.
Total	Total available hours at the end of the year.
Starting Balance	Accrued hours at the start of the current year. Balance is taken from the end balance of the previous year.
Used	Total hours used by the current date. If you are viewing the Time Off Summary for future years, this column displays a zero balance.

Column	Description
Scheduled	Total scheduled hours from the current date until the end of the selected year. If you are viewing the Time Off Summary for previous years, this column displays a zero balance.
Pending	Number of pending hours requested.
Estimated Remaining	Estimated remaining hours.

Required Pay Period Hours section

Column	Description
Current Hours	Number of hours you have worked in the current pay period.
Minimum Required Hours	Number of hours required in the current pay period.
Balance	Number of hours required, less the number of hours you have worked in the current pay period.

Shift Swap section

Column	Description
Shift Swap	Swap board requests and their status.

Shift Bidding section

Column	Description
Shift Bidding	Shift bidding requests and their status.

Time Bank section

If you are assigned to a time bank, this section is available to you.

Column	Description
Target Hours	Total hours you are required to work for the time bank period.
Target Hours (up to date)	Pro-rated number of hours you are required to work from the beginning of the time bank period to the most recently published schedule period.

Column	Description
Scheduled Hours (up to date)	Number of scheduled hours from the beginning of the time bank period to the end of the most recently published schedule period.
Adjustments	Any schedule adjustments between the start date of the time bank to the end of the most recently published schedule period.
Balance	Your scheduled hours, plus any adjustment hours, less your up to date target hours.

Related topics

My Schedule Summary page, page 12

Calculate time off accrual, page 35

View details of your schedule in textual view

In your personal schedule, you can view your schedule information in a textual format. Textual view is most suited for printing your upcoming work schedule.

Available request options

When viewing your schedule in the textual view, you can create a swap board posting or create a swap request for a specific employee.

Alternate way to view your schedule

If you prefer, you can choose to view your schedule in a graphical format.

Procedure

1. Go to **My Home**. Under **My Schedule**, select **Personal**.

   The page shows the current week in textual view, by default.
2. Optional: To choose a different schedule period, use the **Select Date Range** icon.

   < and > buttons move the date range in increments of a month.

   << and >> buttons move the date range calendar in increments of a year.

   When finished, select **Set**.
3. Optional: To request a shift swap, select an upcoming shift and do one of the following:
   - From the pop-up, select **Create New Posting**.

     You can then populate the **Swap Board Posting Form** as detailed in **Managing your Requests**.
   - From the pop-up, select **Create New Request**.

     You can then populate the **Shift Swap Request Form** as detailed in **Managing your Requests**.
4. Optional: Management can amend your schedule while you are viewing your schedule. To refresh schedule information, select **Refresh**.

Related topics

My Personal Schedule page - Textual view, page 16

View details of your schedule in graphical view, page 17

Create a swap board posting, page 48

Create a shift swap request, page 52

My Personal Schedule page - Textual view

This page provides your selected work schedule in a format best suited for printing. If required, you can access the Shift Swap Request Form and the Swap Board Posting Form from this screen.

Settings above schedule

Setting	Description
Select Date Range	Selected schedule period.
View	List for changing between textual and graphical views.
Refresh	Shows any changes made since you last accessed the page.

Schedule

Column	Description
Campaign	Shows which campaign you are assigned to for each shift.
Shift	Date and time of each shift. If no shift has been assigned to you for that day, **Off** is displayed. Your shift is underlined if it is in the future. You can select an underlined shift to create a shift swap or swap board posting. When you create a shift swap or shift posting, a red flag is displayed next to the applicable shift.
Activities	Breakdown of assignments and breaks for the day.
Activity's Campaign	The campaign the activity belongs to.

Related topics

View details of your schedule in textual view, page 15

My Personal Schedule page - Graphical view, page 18

Create a swap board posting, page 48

Create a shift swap request, page 52

View details of your schedule in graphical view

In your personal schedule, you can view your schedule information in a graphical format. This view provides an overview of your schedule, at-a-glance.

Alternate way to view your schedule

If you prefer, you can also view your schedule in a textual format.

Net staffing ribbon

With graphical view, you can use the net staffing ribbon to identify time periods that are over or understaffed. For overstaffed periods, you can create a voluntary time off (VTO) request. For understaffed periods, you can create a shift request and change.

> The net staffing ribbon is only available in graphical view. If you cannot view the net staffing ribbon, check your WFM preferences. To view the net staffing ribbon, the **Show Net Staffing in Graphical Schedules** setting must be selected.

Procedure

1. Go to **My Home**. Under **My Schedule**, select **Personal**.
2. From the **View** box, select **Graphical**.

   By default, the current week is displayed.
3. Optional: To select another scheduling period, use the date range selector:

   < and > buttons move the date range in increments of a month.

   << and >> buttons move the date range in increments of a year.

   When finished, select **Set**.
4. Optional: Do one of the following to create a request using the net staffing ribbon:
   - To add an extension before your shift, select and drag the desired amount of time to the left of your shift start time.
   - To add an extension after your shift, select and drag the desired amount of time to the right of your shift finish time.

     From the pop-up, you can then populate the **Shift Request and Changes** form as detailed in the **Managing your Requests** section.
   - To request voluntary time off from a shift that is overstaffed, select and drag the desired amount of time from your scheduled shift.

     From the pop-up, you can populate the Time Off Request form as detailed in the **Managing your Requests** section.
5. Optional: Management can amend your schedule while you are viewing it. To refresh schedule information, select **Refresh**.

Related topics

View details of your schedule in textual view, page 15

My Personal Schedule page - Graphical view, page 18

Create a time off request, page 32

Shift Request & Change form, page 59

Related information

Workforce Management Preference Settings *(Workforce Optimization Getting Started Guide)*

My Personal Schedule page - Graphical view

This page provides your selected work schedule in a graphical format. If the net staffing ribbon is enabled, you can access the Shift Request and Changes form and the Time Off form if needed.

Settings above schedule

Setting	Description
Select Date Range	Selected schedule period.
View	List for changing between textual and graphical views.

Schedule

Field	Description
Legend	Indicates the color legend for the graph.
Refresh	Shows any changes made since you accessed this page.
Net Staffing Ribbon	If enabled, this ribbon shows under shifts for the upcoming seven days. Using color coding, the ribbon indicates any of your shifts that are overstaffed or understaffed. When a shift is overstaffed, it indicates an opportunity to request voluntary time off. If a shift is understaffed, it indicates an opportunity to request extra work time (shift or shift extension). The Net Staffing ribbon is enabled in your Workforce Management Preference.

Related topics

My Personal Schedule page - Textual view, page 16
View details of your schedule in graphical view, page 17
Request additional shifts and shift changes, page 57
Shift Request & Change form, page 59

View your group's schedule in textual view

In your group's schedule, you can view your schedule and the schedule for everyone in your group. Textual view is best suited for printing daily group schedules.

Alternate ways to view your group's schedule

If you prefer, you can view your group schedule in a graphical, or multiday format.

Available request options

Textual view also allows you to post to the Shift Swap Posting Board or to request shift swaps directly with other employees.

Procedure

1. Go to **My Home**. Under **My Schedule**, select **Group**.
2. Optional: Using the date range selector, choose a date.

   < and > buttons move the date in increments of a month.

   << and >> buttons move the date range calendar in increments of a year.

   When finished, select **Set**.

   Then, using the **Day** list, select a day.
3. Optional: Do the following:
   - To select a filter type, use the **Sort By** list.
   - To select which employees to view, use the **Viewing Person** arrows.
   - Management can amend your schedule while you are viewing this screen. To refresh schedule information, select **Refresh**.
   - To view schedules belonging to other groups, use the **Organization/Campaign Group Selector**.
4. Optional: To request a shift swap, select your shift on the day selected, and do one of the following:
   - From the pop-up, select **Create New Posting**.

     You can then populate the **Swap Board Posting Form** as detailed in **Managing your Requests**.
   - From the pop-up, select **Create New Request**.

     You can then populate the **Shift Swap Request Form** as detailed in **Managing your Requests**.

Related topics

My Group Schedule page - Textual view, page 20

View your group's schedule in graphical view, page 21

View your group's schedule in multiday view, page 23

Create a swap board posting, page 48

Create a shift swap request, page 52

My Group Schedule page - Textual view

This page provides your group's selected work schedule in a format best suited for printing. If required, you can access the Shift Swap Request Form, and the Swap Board Posting Form from this screen.

Settings above the schedule

Setting	Description
Organization/ Campaign Group Selector	Organizations and campaigns that you can choose from.
Select Date Range	Selected schedule period.
Day	List where you can select which day from the selected schedule period to show.
Sort By	List where you can choose how to organize the schedule by.
View	List where you can choose between Textual, Graphical, and Multiday views.
Refresh	Refreshes the data.

Schedule

Column	Description
Name	Name of employees in the group.
Campaign	Name of campaign assigned to the employee.
Shift	Date and time of each shift. If no shift has been assigned to an employee for that day, **Off** is displayed. Your shift is underlined if it is in the future. You can select an underlined shift to create a shift swap or swap board posting. When you, or someone in your group creates a shift swap or shift posting, a red flag is displayed next to the applicable shift.
Activities	Breakdown of assigned activities for the day.
Activity's Campaign	The campaign the activity belongs to.

Related topics

View details of your schedule in textual view, page 15

My Group Schedule page - Graphical view, page 22

My Group Schedule page - Multiday view, page 24

Create a swap board posting, page 48

View your group's schedule in graphical view

You can view your group's schedule information in a graphical format. Graphical view is most suited to seeing an overview of your group's schedule, at-a-glance.

Alternate ways to view your group's schedule

If you prefer, you can also view your schedule in a textual, or graphical format.

Net staffing ribbon

In the graphical view, you can use the net staffing ribbon to identify time periods that are over or understaffed. For overstaffed periods, you can create a voluntary time off (VTO) request. For understaffed periods, you can create a shift request and change.

> The net staffing ribbon is only available in graphical view. If you cannot view the net staffing ribbon in graphical view, check your WFM preferences. To view the net staffing ribbon, the **Show Net Staffing in Graphical Schedules** setting must be selected.

Procedure

1. Go to **My Home.** Under **My Schedule**, select **Group**.
2. Using the **View** box, select **Graphical**.

   By default, the screen shows the current day's scheduling information.
3. Optional: Using the date range selector, choose a date.

   < and > buttons move the date in increments of a month.

   << and >> buttons move the date range calendar in increments of a year.

   When finished, click **Set**.
4. Optional: Do the following:
   - To choose another day, use the day selector.
   - To select a filter type, use the **Sort By** list.
   - To select which employees to view, use the **Viewing Person** arrows.
   - Management can amend your schedule while you are viewing this screen. To refresh schedule information, select **Refresh**.
   - To view schedules belonging to other groups, use the **Organization/Campaign Group Selector**.
5. Optional: Do one of the following to create a request using the net staffing ribbon:
   - To add an extension before your shift, select and drag the desired amount of time to the left of your shift start time.
   - To add an extension after your shift, select and drag the desired amount of time to the right of your shift finish time.

     From the pop-up, you can then populate the **Shift Request and Changes** form as detailed in the **Managing your Requests** section.
   - To request time off from a shift that is overstaffed, select and drag the desired amount of time from your scheduled shift.

From the pop-up, you can populate the **Time Off Request** form as detailed in the **Managing your Requests** section.

Related topics

View your group's schedule in textual view, page 19
View your group's schedule in multiday view, page 23
My Group Schedule page - Graphical view, page 22
Create a time off request, page 32
Shift Request & Change form, page 59

My Group Schedule page - Graphical view

This page provides your selected group's work schedule in a graphical format. If the net staffing ribbon is enabled, you can access the Shift Request and Changes Form, and the Request Time Off form if you require.

Setting	Description
Organization/ Campaign Group Selector	Organizations and campaigns that you can choose from.
Select Date Range	Selected schedule period.
Day	Menu where you can select which day from the selected schedule period to show.
Sort By	Menu where you can choose how to organize the schedule by.
View	Menu where you can choose between Textual, Graphical, and Multiday views.
Legend	Indicates the color legend of the graph.
Refresh	Refreshes the data.
Viewing Person	Menu where you can select how many employees of the group to show per schedule page. Arrows to click between the pages.

If you cannot view the net staffing ribbon in graphical view, check your WFM preferences. To view the net staffing ribbon, the **Show Net Staffing in Graphical Schedules** setting must be selected.

Related topics

View your group's schedule in textual view, page 19
My Group Schedule page - Textual view, page 20
My Group Schedule page - Multiday view, page 24

View your group's schedule in multiday view

You can view your group schedule information in a multiday format. Multiday view allows you to see your group's schedule for a week.

Available request options

From the multiday view, you can create shift swap postings or shift swap requests while viewing the schedule for your group.

Alternate ways to view your group's schedule

If you prefer, you can also view your schedule in a textual, or graphical format.

Procedure

1. Go to **My Home.** Under **My Schedule,** select **Group**.
2. Using the **View** box, select **Multiday**.

   By default, the current week's scheduling information is displayed.
3. Optional: Using the date range selector, choose a date.

   < and > buttons move the date in increments of a month.

   << and >> buttons move the date range calendar in increments of a year.

   When finished, click **Set**.
4. Optional: Do the following:
   - To choose another day, use the day selector.
   - To select a filter type, use the **Sort By** list.
   - To select which employees to view, use the **Viewing Person** arrows.
   - Management can amend your schedule while you are viewing this screen. To refresh schedule information, select **Refresh**.
   - To view schedules belonging to other groups, use the **Organization/Campaign Group Selector**.
5. Optional: To request a shift swap, select your shift on the day selected, and do one of the following:
   - From the pop-up, select **Create New Posting**.

     You can then populate the **Swap Board Posting Form** as detailed in **Managing your Requests**.
   - From the pop-up, select **Create New Request**.

     You can then populate the **Shift Swap Request Form** as detailed in **Managing your Requests**.

Related topics

View your group's schedule in textual view, page 19

View your group's schedule in graphical view, page 21

My Group Schedule page - Multiday view, page 24

Create a swap board posting, page 48

Create a shift swap request, page 52

My Group Schedule page - Multiday view

This page provides your selected group's work schedule in a list. If required, you can access the Shift Swap Request Form, and the Swap Board Posting Form from this screen.

Setting	Description
Organization/ Campaign Selector	Organizations and campaigns that you can see schedules for.
Select Date Range	Selected schedule period.
Sort By	Menu where you can choose how to organize the schedule by.
View	Menu where you can choose between Textual, Graphical, and Multiday views.
Refresh	Refreshes the data.
Viewing Person	Menu where you can select how many employees of the group to show per schedule page. Arrows to click between pages.

Related topics

View your group's schedule in multiday view, page 23
My Group Schedule page - Textual view, page 20
My Group Schedule page - Graphical view, page 22

Chapter 3

Managing your requests

My Requests allows you to manage all types of personal requests. Requests include: time off, flex time, shift swaps, shift bidding, and shift requests and changes. In addition, you can view time off activities in different calendar formats.

Topics

View request policies and rules

When your organization has entered policies for submitting requests and is using various types of request rules, you can view them.

The following information may be available:

- Time Off Management Policies
- Flex Time Policies
- Shift Swap Policies
- Shift Bidding Policies
- Shift Requests & Change Policies
- Auto Processing rules
- Auto Breaking rules
- Filing Rules

Procedure

1 Go to **My Home**. Under **My Requests**, select **Policies**.

2 To show and hide content, do the following:
   - To show a section, select the right arrow.
   - To hide a section, select the down arrow.

Related topics

Policies page, page 26

Policies page

The Policies page allows you to view request policies entered by your organization, and various types of system rules for processing requests.

Field	Description
Time Off Management Policies	Displays any policies entered by your organization for time off requests.
Flex Time Policies.	Displays any policies entered by your organization for flex time requests.
Shift Swap Policies	Displays any policies entered by your organization for shift swap requests.
Shift Bidding Policies	Displays any policies entered by your organization for shift bidding requests.

Field	Description
Shift Requests & Changes Policies	Displays any policies entered by your organization for shift requests and changes.
Auto Processing	Displays information about all active auto processing rules in this organization. Auto processing rules specify how to automatically process requests.
Auto Breaking	Displays information about all active auto breaking rules in this organization.
Filing Rules	Displays information about all active filing rules in this organization. Filing rules specify when requests must be submitted.

Related topics

View request policies and rules, page 26

View the daily time off calendar

To help plan your time off requests, use the time off calendar. For each day, you can view your scheduled and pending hours and your time off pool available and allocated hours,

Procedure

1. Go to **My Home**. Under **My Requests**, select **My Time Off Calendar**.
2. Optional: Do one of the following:
   - To change the date displayed, use the month and year lists.
   - To change the type of time off shown, make a selection from the **Time Off Type** list.
   - To change the number of months shown, make another selection from the **View** list.
   - To change from viewing your own time off calendar or your time off pool calendar, make another selection from the **Display** list.

Related topics

Time off calendar page , page 28

View the daily intervals time off calendar, page 30

Time off calendar page: daily intervals view, page 30

Time off calendar page

View time off information in a calendar format. Use this calendar to plan your time off requests.

Setting	Description
month and year list	Identifies the month and year of the time off calendar. Default is the current month and year.
Time Off Type	Time off activity type.
View	List of calendar views. Select from a one month, two months, or year-at-a-glance display.

Setting	Description
Display	The following two options are available when you select 1 month, or 2 month view: • Personal View: - **Hours Available** indicates the remaining number of time off hours in the current time off pool. - **Hours Pending** indicates the number of your time off hours that have not been approved or denied. - **Scheduled Time Off** indicates the number of your time off hours that have been approved. • My Time Off Pool View: - **Hours Allocated** indicates the total time off hours allocated in the time off pool. - **Hours Pending** indicates the total time off hours for everyone in the time off pool that have not been approved or denied. - **Scheduled Time Off** indicates the total time off hours approved for everyone in the time off pool.

Related topics

View the daily time off calendar, page 28
View the daily intervals time off calendar, page 30
Time off calendar page: daily intervals view, page 30

View the daily intervals time off calendar

The daily intervals time off calendar shows calendar information for periods of time from 15 minutes to 24 hours. Use this view to plan time off requests for partial days.

There are many options for viewing information on the time off calendar. When each option is changed, the calendar is refreshed.

Procedure

1. Go to **My Home**. Under **My Requests**, select **My Time Off Calendar**.

   By default, your daily time off calendar is displayed.
2. Optional: To select a different start date, use the date selector.
3. Optional: To select a different time off type, use the **Time Off Type** list.
4. From the **View** list, select **1 month - daily intervals**.
5. Optional: If required, use the **Display** list to select the **My Time Off Pool View**.
6. Optional: Do one of the following:
   - To view the interval information in a tooltip, move the pointer over the interval.
   - To view the interval information in a larger pop-up window, select the interval box.
7. Optional: To view the calendar for another date, use the date selector.

Related topics

Time off calendar page: daily intervals view, page 30

View the daily time off calendar, page 28

Time off calendar page , page 28

Time off calendar page: daily intervals view

Use the daily interval view of the Time Off calendar to view interval time off hours in a table format for yourself, or everyone in your time off pool.

Settings above the time off calendar

Setting	Description
month and year list	Identifies the month and year of the time off calendar. Default is the current month and year.
Time Off Type	Time off activity type.
View	List of calendar views. Select from a one month, two months, or year-at-a-glance display.

Time off calendar in daily intervals view

Column	Description
Date	Chosen month showing all days of that month. Default shows the current month.
[*hourly intervals*]	Each hour in a 24 hour clock. • Personal View: - **Hours Available** indicates the remaining number of time off hours in the current time off pool. - **Hours Pending** indicates the number of your time off hours that have not been approved or denied. - **Scheduled Time Off** indicates the number of your time off hours that have been approved. • My Time Off Pool View: - **Hours Allocated** indicates the total time off hours allocated in the time off pool. - **Hours Pending** indicates the total time off hours for everyone in the time off pool that have not been approved or denied. - **Scheduled Time Off** indicates the total time off hours approved for everyone in the time off pool.

Related topics

View the daily intervals time off calendar, page 30

View the daily time off calendar, page 28

Time off calendar page , page 28

Create a time off request

When you want to schedule time off, you can submit a request for approval.

Procedure

1. Go to **My Home**. Under **My Requests**, select **Time Off Calendar**.
2. Optional: To check your available time off, click **Calculate Estimate** and use the Time Off Calculator.
3. Select **Create New Request**.
4. Under the **Request Summary** section, do the following:
   a. Select the time off type.
   b. Select how you want the time off to affect your scheduled hours.
   c. Optional: Add a comment.
5. Under the **Time Off Choices** section, do the following:
   a. To specify a date and time range for your time off choice, use the date selector.
   b. Optional: To add another time off choice, select **Add**.
   c. To ensure that multiple choices are sorted in order of preference, select a choice and use the **Move Up** or **Move Down** buttons.
6. Optional: To help you make your time off choices, you can view the time off calendar for two, consecutive months. The following options are available:
   - To change the months, use the month and year lists.
   - To view the time off calendar legend, select **Legend**.
7. Select **Save.**

   The request is listed on **My Requests** page.

Related topics

Time Off request form, page 32
Escalate denied requests, page 1
View and manage your requests, page 62

Time Off request form

Use the time off request form to create a request for a time off activity.

Field	Description
Request Summary	
Employee Name	Indicates the name of the employee.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Time Off Type</td><td>Specifies the type of time off request.
Values include activities that the administrator has configured as time that can be requested off.
Examples include:
Floating Holiday
Personal Day
Sick
Unavailable
Vacation
Voluntary Time Off</td></tr>
<tr><td>Advanced VTO Options</td><td>When the selected time off type has multiple Voluntary Time Off choices, the following options are available.
Full Day: Requests VTO for your entire shift.
Partial Day: Requests VTO for a specific start time and length of time.
Late Start: Requests VTO by starting your shift as late as possible.
Early Off: Requests VTO by ending your shift as early as possible.
Anytime Off: Requests VTO at anytime during your shift.</td></tr>
<tr><td>Time Off Hours</td><td>Specifies how you want the time off request to affect the regularly scheduled hours.
For all the Time Off types except Unavailable, the possible choices are:
Use my time off hours to schedule my absence: Indicates to use the allocated time off hours and work fewer hours than the full schedule for that week.
Schedule around my time off request if possible: Indicates to schedule the employee as needed, except for the time requested off. This option is only useful:
When the employee has flexibility in their work rules
Time off is being requested before the schedule is run
For Unavailable, the choice is:
Mark as unavailable and schedule around this time: Indicates to schedule the employee for the full number of work hours, working around the time marked as unavailable.</td></tr>
<tr><td>Add Comment</td><td>Allows you to add comments about the time off request.</td></tr>
<tr><td>Add to Waitlist if not Approvable</td><td>If time off waitlists are used, this check box is available.
If your request is not approved, this option indicates whether to waitlist the request.</td></tr>
</table>

Field	Description
Expiry Date	If time off waitlists are used, this check box is available. Optional: Specifies until what date the request is valid. You can type any date (after the current date) here. If you do *not* type a date, the system updates the expiry date to the request start date. Requests are marked invalid once they are past the request start date.
Time Off Choices	
(*start date and end date of time off*)	Calendar icon for selecting the date range of the time off request. By default, the current day is selected.
Length	Displays the length of the time off request in days or hours as appropriate.
Hours Accounted	Displays the number of the time off hours in the request based on the scheduled shift.
Time Off Calendar	
Time Off Calendar	Time off information for four, consecutive months is available. This information is intended to help you make the correct choices for time off dates. (You *cannot* select a time off period by clicking dates in the Time Off Calendar container.) The months shown can be changed through the month and year list box menus in the header of the container. The Time Off Calendar color legend can be toggled by clicking **Legend** in the header of the container.

Example: Schedule around my time off request if possible

- You work an 8-hour schedule but the start time is flexible.
- You submit a time off request from 4:00-6:00 PM for an appointment.
- Due to the flexible start time, the scheduling engine comes up with schedule for you to work from 7:00-4:00. This schedule allows you to have your full eight hours without using up any of the times off.

In other words, the time off hours appear on the calendar. However, the hours do not get used from your allocation because there is no scheduled shift under it.

Example: Use my time off hours to schedule my absence

- You work an 8-hour schedule but the start time is flexible.
- You submit a time off request from 4:00-6:00 PM for an appointment.
- The scheduling engine attempts to schedule your shift from 9:00-6:00 (or something else that overlaps the time off). Your regular work hours are reduced and the time off is used out of your allocation.

Related topics

Create a time off request, page 32

Calculate time off accrual

To find how much time off you have, use the time off accrual calculator.

Procedure

1. Go to **My Home**. Under **My Schedule**, select **Summary**.
2. Select the **Time off accrual calculator**.
3. Select a date to calculate accrual to.
4. To generate your time off accrual, select **Calculate**.
5. When finished, select **Done**.

Related topics

Time off accrual calculator dialog box, page 35

Time off accrual calculator dialog box

When you calculate your time off accrual, the system provides your accrual and balance information.

Column	Description
Estimated Remaining	Estimated available hours remaining for the specified type of time off, by the specified date.
Accrual Schedule	The accrual rate for the selected time off type.
Maximum Balance	Maximum balance allowed for the selected time off period in the selected time off year.
Maximum Carryover	Maximum carryover allowed for the selected time off type in the selected time off year.
Scheduled as of...	Scheduled hours at the end of the selected time off year.
Pending as of...	Pending hours at the end of the selected time off year.

Related topics

Calculate time off accrual, page 35

View Time Off Report

The Time Off report provides information about past and scheduled time off. By default, the calendar displays information for the current calendar year. This date range can be changed.

Procedure

1. Go to **My Home**. Under **My Requests**, select **My Time Off Report**.
2. Optional: To view time off events for another date range, use **Select Date Range** icon to select different dates.

Related topics

Time off report page, page 36

Time off report page

View details of the time off you have scheduled, and the time off you have taken.

Column	Description
Time Off Taken	List of instances of time off that you have already taken.
Time Off Scheduled	List of instances of time off that you have scheduled for a future date.
Activity	Time off activity type.
Start	Time off start date.
End	Time off finish date.
Length	Time off duration.
Hours Accounted	Total number of hours per request.

Related topics

View Time Off Report, page 36

Submit one shift bid at a time

Submit a shift bid to be included in an auction for a scheduling period.

Alternate way to submit bids

If you prefer, you can submit multiple bids at a time.

Before you begin

You should understand the different types of shift bids.

Procedure

1. Go to **My Requests**, then select **My Bid Options**.
2. In the drop-down list, select a shift bid auction.
3. Optional: Change your view.
   - To limit the bid options in the list, use a filter.
   - To change the sort order, point to a column heading. Options include:
     - A non-date column heading sorts the list in ascending or descending order.
     - A date column heading displays a menu that provide multiple options for sorting.
4. Optional: To view the skills required for a shift, select a shift link. (Links are underlined.)
5. Select a shift by clicking a template row in a non-link area.

   Do one of the following:
   - If the auction is for full schedule bids for the schedule period, select one schedule.
   - If the auction is for various shifts for the schedule period, select one shift for each day.
   - If the auction is for shift blocks, select multiple shift blocks each day.
6. Select **Create**.

   The Shift Bid Request: Create New Request form is displayed.
7. Complete the form.
   a. Type a bid name.
   b. Change the preference number if needed.
   c. Optional: Type comments.
   d. Optional: Other fields, such as **Use Points**, may be available based on how the auction is set up.
8. When finished, select **Save**.
9. Review your bid and make changes if needed.
10. When there are no changes, select **Done**.
    - The **My Bid Options** page is updated with the preferences saved for the submitted bids.

      After a bid is submitted, the preference number can be changed, saved, and resubmitted when the bid status is Pending or Escalated.
    - The **My Requests** page lists each shift bid submitted from the Create New Request form page is in your preference order and with the bid name that you entered, and the status.

Related topics

Submit multiple shift bids at a time, page 42

Create a filter for bid options

A bid options filter excludes shifts that do not meet your specifications. Using a filter can make it easier for you to find shifts that you want to bid on.

Procedure

1 Go to **My Home**. Under **My Requests**, select **My Bid Options**.

2 To create a filter, do the following:

a. Select **Filter**.

b. From the **Request Filter Configuration** window, select any combination of filter options for shifts and schedules, activities, and skills.

c. Select **Save**.

- The bid options list is refreshed based on your filter and sort settings.
- The filter and sort settings are saved and displayed in the filter list.

3 If you want to make changes to the existing filter, add, change, or remove filter settings, do the following:

a. Select **Filter**.

b. From the **Request Filter Configuration** window, select any combination of filter options for shifts and schedules, activities, and skills.

c. Select **Save**.

- The bid options list is refreshed based on your filter and sort settings.
- The filter and sort settings are saved and displayed in the filter list.

4 If you no longer want to use a filter, do the following:

a. Select **Filter**.

b. Select **Clear**.

c. Select **Save**.

- The bid options list is refreshed with all available options.
- The filter and sort settings are cleared from the filter list.

> Names assigned to biddable schedules have two possible sources, **Template Name**, and **Shift Name**. If filtering using one of these options does not lead to accurate results, try using the other option.

Related topics

Submit one shift bid at a time, page 37

Submit multiple shift bids at a time, page 42

Bid Options filter page

Use this filter to find suitable shifts that are available for you to bid on.

Option	Description
Shifts and Schedules	
Template Name	Name of the template assigned to the biddable schedule.
Availability	Number of instances of a particular shift template that have not yet been bid upon. Filter by: • Any Number of Options • Equal To • No More Than • No Less Than • Between
Schedule Length	Length (in hours) of a particular template. Filter by: • Any Length • Equal To • No More Than • No Less Than • Between
Shift Name	Name of the shift assigned to the biddable schedule.
Shift Length	Length (in hours) of a particular shift (the number of hours on a particular day). Filter by: • Any Length • Equal To • No More Than • No Less Than • Between

Option	Description
Shifts Starting	Shift start time. Filter by: • Any Time • At • Not After • Not Before • Between
Shifts Ending	Shift finish time. Filter by: • Any Time • At • Not After • Not Before • Between
Activities	
Activity Name	Name of activities within the schedules displayed. You can select up to two to filter by. For example: • Break • CKA • Late • Learning Break
Length	Length (in hours) of a particular activity. Filter by: • Any Length • Equal To • No More Than • No Less Than • Between

Option	Description
Starting	Activity start time. Filter by: • Any Time • At • Not After • Not Before • Between
Skills	
Skills Associated with Shift	A two-column table listing the skills you have.

Related topics

Create a filter for bid options, page 38

Submit multiple shift bids at a time

To be included in a shift auction for a schedule period, you can submit multiple shift bids at a time.

When an auction is set up to require a minimum number of available schedules in a bid request, you must bid on enough schedules to meet or exceed this requirement.

When you set a preference for a template, a message above the bid options list indicates the total number of available schedules in your current submission.

Alternate way to submit bids

If you prefer, you can submit one bid at a time.

Before you begin

Be familiar with the different types of shift bids.

Procedure

1. Go to **My Requests**, then select **Bid Options**.
2. Optional: If you are in two auctions and need to bid on the another auction, click the other auction in the drop down list above the Bid Options list (left side).

   The list of bid options is refreshed.
3. Optional: Change your view.
   - To limit the bid options in the list, use filter.
   - To a column heading to change the sort order, point to a column heading.
   - Options include:
     - A non-date column heading sorts the list in ascending or descending order.
     - A date column heading displays a menu that provides multiple options for sorting.
4. Check the top of the workspace to see if a message is displayed that indicates your bid submission must contain a minimum number of available schedules.

   Example: Kim Smith’s bid submissions must contain at least 40 available schedules.
5. Do one of the following based on whether your auction requires a minimum number of available schedules in your bid submission and your preference for making bid submissions:
   - When you are required to have a minimum number of schedules in your bid submission, create your bids on the Bid Options page. Continue to step 6.
   - When you are not required to have a minimum number of available schedules in your bid submission, you have two options:
     - Create one or more bids on the **Bid Options** page. Continue to Step 7.
     - Create one bid at a time using the **Shift Bid Request** form if you prefer that method.
6. In the **Template** column, identify the schedule or shifts you want to bid on (based on the auction).
7. In the **Preference** box, select a bid by entering a number to indicate your preference for that schedule or shift (1 = first choice, 2 = second choice, and so on).

> If you need to finish your bid submission later and want to save the preferences that you have entered, click **Save Preference**.

8 Repeat step 6 and step 7 until you have selected all your bids with the correct preference number.

You have the following options:

- Select only the bids needed to meet your minimum number of available schedules.
- Select enough bids to exceed your minimum number of available schedules.
- Select any number of bids when no minimum number of available schedules is required.

9 Select **Submit Multiple Bids**.

10 When prompted to confirm the number of bids, select **OK**.

Results after the bids are processed:

- On **My Bid Options** page: This page is updated with the preferences saved for the submitted bids.

  After a bid is submitted, the preference number can be changed, saved, and resubmitted when the bid status is Pending or Escalated. (The status can be viewed on the employee's My Requests page).
- On **My Requests** page: Each shift bid submitted from the Create New Request form page is listed in your preference order and with the name that you entered.
- On **My Notifications** page: A notification for each submitted shift bid is listed on this page when the bid submission alert is set up.
- If you were required to submit bids to meet a minimum number of available schedules for this employee:
  - For future bids in this auction, you can create a single bid at a time using the **Shift Bid Request** form.
  - If you withdraw a shift bid request and fall below the employee's required minimum number of available schedules, you need to meet the employee's minimum number of available schedules.

Related topics

Submit one shift bid at a time, page 37

My Bid Options page

Use this page to view available biddable schedules for an auction and to create Shift Bid Requests.

Features below the menu and above the bid options

Feature	Description
(*minimum number of bids message*)	If an auction is set up with Multi-bid Submission, the system displays a message about the minimum number of available schedules that must be in bids submitted. Message text: <employee first and last name>'s bid submissions must contain at least <number> available schedules. When this message is displayed, you cannot submit a bid request until you have met the required number of minimum available shifts.
(*current submission message*)	If an auction is set up with Multi-bid Submission, the system displays a message that indicates the number of available schedules in the current submission. Message text: Current submissions contain <number> available schedules. This number is the total from the Available column for all templates that have a preference set. It increases and decreases when a preference is added or removed.
filter and sort setting list box	Lists the available filter and sort settings.
Filter button	Displays the Edit Filter: Shift Bids window.

Bid Options list column descriptions

Column	Description
Template Name	Name of the template.
Description	Provides additional information about the template when this feature is set up.
Preference	Use to create a shift bid request. When a preference is entered, the schedule is selected for a bid. One indicates the highest ranked schedule, two indicates the second highest ranked schedule, and so on. When more than one bid has the same preference number, the bids have equal preference. After a bid is submitted and the status is Pending or Escalated, the preference number can be changed, saved, and resubmitted. (The status can be viewed on the My Requests page.)

Column	Description
Status	Indicates the status of the preference for that shift bid. • **Pending**: Bid preference has been submitted. • **Saved**: Bid preference has been saved, but not submitted. • **Edited, Saved**: Bid preference was previously submitted, but has been changed and saved. The new bid preference has not yet been submitted. • **Denied**: The bid preference was submitted and denied. The preference cannot be changed. (The status can be viewed on the Employee Requests page and the My Requests page.) • (**No status shown**): A status in not available when the bid preference has been entered, but has not been saved. The preference can be changed.
Available	Number of instances of the template that have not yet been bid on. When an auction is set up with Multi-bid Submission, this number is added to the current submissions total message displayed above the bid options list.
Submitted	Number of bids submitted.
Bonus	Bonus points awarded for working this shift/schedule.
Hours	Total number of hours in the template.
(*remaining columns*)	Starting with the current day, shows the shift start and ending times for each day.

Related topics

Submit one shift bid at a time, page 1

Submit multiple shift bids at a time, page 1

Shift bid request form

Use this form to view the details of a selected shift bid request or to edit a request.

Section	Description
Shift bid request section	Displays shift bid request information, and can be edited when you are updating a request. The information includes the bid Name, Preference Level (if applicable) and comments associated with the requests.

Section	Description
Auction section	Displays associated shift bid Auction information and is not editable. The information in this container includes Scheduling Period and deadlines.
Biddable schedule information	Displays shift assignment information for one or more selected Biddable Schedules and is not editable.
Alerts section	Displays the icons and a description for any failed validations.
History and status information	Contains the modification history (audit trail) and status of the request.

When an Auction is configured to use Bonus Points, a check box allowing you to specify Use Points is displayed. Keep in mind that using points might affect the rank on the Shift Bid Requests. This information is displayed in the Shift Bid auction section of this form.

Related topics

My Bid Options page, page 43

Submit one shift bid at a time, page 37

Submit multiple shift bids at a time, page 42

Copy previous time off bid choices

If the copy time off bid request feature is turned on, you can copy unapproved choices from a previous time off bid. With this method, the Create New Request form opens with the time off type, time off hours, and any choices that were not approved in the previous bid. Any comment history is not copied.

On My Requests page, a copy icon is displayed in the Actions columns for a request when it:

- is from a closed bid.
- has the status of pending or approved.
- has choices that can be approved.

Procedure

1. Go to **My Home**, then select **My Requests**.
2. In the **Actions** column, locate a previous request with a copy icon.
3. Select the copy icon.
4. Complete the request.
5. Select **Save**.

   If bid criteria is met, the request is submitted as a bid in the appropriate auction.

Related topics

Submit one shift bid at a time, page 37

Submit multiple shift bids at a time, page 42

Create a swap board posting

A swap board posting communicates that you want to swap either a shift or non-work time with any one. The posting is listed on the Swap Board for others to view and, when interested, pick up the posting to negotiate the swap.

A swap posting is a contract between two employees, and has to be approved by a manager.

Example: Swap board posting for a shift

Mark works on Monday and his shift is from 8 AM to 5 PM. He wants to work on Monday, May 5th, but on a different shift. He creates a swap board post for his shift on Monday, May 5th, from 8 AM to 5 PM, a two-way swap.

Other employees can view the swap board and select Mark's post and negotiate swapping shifts on Monday, May 5th.

Example: Swap board posting for non-work time

Pam is not scheduled to work on Saturday and wants to pick up more hours by working on Saturday, June 25th. She creates a swap board post for non-work time for a one-way swap.

Other employees can view the swap board and select Pam's post and negotiate swapping their work time on Saturday, June 25th for time off.

Alternate way to swap

If you prefer, you can create a shift swap request that is for a specific person.

Procedure

1. Go to **My Home**. Under **My Requests**, select **Swap Board**.

   Initially the Swap Board is displayed with both full and partial swap postings. The view is the All Posting view. (Postings in your campaign and your organization including postings created by you.)
2. Optional: To view only full postings and exclude partial postings, select the **Show only full postings** check box.
3. Optional: To narrow down the list of postings, from the **View** list, select another option.
4. Select **Create New Posting**.
5. In the posting statement list, select the swap type, date (for non-Work Time), and the type of swap (one-way or two-way swap).
6. Shift swaps only: To determine shift swap duration, do one of the following:
   - Select entire shift and the date.
   - Select partial shift and the start and ending dates and times.
7. Select the date and time that the posting will expire.
8. To determine who submits the swap request to the manger, do one of the following:
   - Select whether the employee willing to swap must send the request to you.
   - Select whether the employee willing to swap can send the request directly to the manager.
9. Optional: Add comments for employees viewing this posting.
10. To save your changes, select **Save**.
11. When finished with the request, select **Done**.

The posting is added to the swap board.

Related topics

Swap Board posting list, page 49
Swap Board posting form, page 50

Swap Board posting list

This page shows available shift swap postings.

Settings above the swap board list

Setting	Description
Show only full postings	When selected, only full shift swaps are included in the list. Partial shift swaps are excluded.
View	Options to change which postings are displayed. Options include: • **My Postings** (default): Shows all posting created by you. • **All Postings**: Shows postings in both your campaign and your organization including postings created by you. • **My Campaign**: Only shows postings in your campaign. • **My Organization**: Only shows posting in your organization.

Swap board list

Column	Description
Name	Employee name.
Shift Date	Date of the shift being swapped.
Start	Shift start time.
End	Shift finish time.
Post Expires	Date the post will expire.
Partial Shift	States if this shift swap is a partial shift, and not a full shift.
Confirm	Indicates whether the swap has been confirmed.
Swap Type	Indicates the type of swap: one way or two way.
Comments	Any additional comments relating to the shift swap.
Actions	Any actions require for this shift swap.

Related topics

Create a swap board posting, page 48

Swap Board posting form

Use this form to create a posting for a swap on the swap board. The swap can be for a shift or non-work time.

Swap board posting settings

Setting	Description
A combination of the following three settings form a description of the swap.	
Post a ____	Identifies what you want to swap. Options are shift or non-work time.
on ____	This setting is available for non-work time swap postings. Date of the non-work time swap occurs.
to bulletin board for a ____ swap	Identifies the type of swap. Options are Two-way or one-way.
The following two sets of options are available for swapping a shift.	
• Entire shift • Partial shift	Identifies either the date of the entire shift or the date and time of the partial shift.
• The employee willing to swap should pick the entire posting. • The employee willing to swap may pick a portion of the posting.	Determines whether the employee willing to swap can pick a portion of the posting.
The posting will expire on____	Date and time the posting expires.
Comments attached to this posting.	Comments available to employees viewing the posting.

Related topics

Swap Board posting list, page 49

Pick up a posting from the swap board

View the swap board to see if there is a posting that you would like to pick up.

You can view any postings for swapping shifts or non-work time. The postings can be for either a one-way swap or a two-way swap.

- When you pick up a one-way swap, you take a shift or non-work day from another employee without the other employee taking a swap from you.
- When you pick up a two-way swap, you take a shift or non-work day from another employee and give them a shift or non-work day.

Procedure

1. Go to **My Home**. Under **My Requests**, select **Swap Board**.
2. Locate a posting that you would like to pick up.
3. Optional: To view your personal schedule, in the **Actions** column, select the View Personal Schedule icon. If you view your schedule, you will have to use the menu to return to the swap board.
4. In the **Actions** column, select the Pickup Posting icon.

   The **Create New Request from Posting** form is displayed.
5. If you want to negotiate changes with the posting employee, do the following:

   a. Optional: To change when a response is needed, select another date and time.

   b. Optional: To suggest a change, add a negotiation comment.
6. If you want to submit the request for approval, select the **I want to submit this request for approval check box**.
7. When finished, select **Save**, then select **Done**.

   The request is added to each employee's **My Requests** page.

Related topics

Swap Board posting list, page 49

Shift Swap request form, page 53

View and manage your requests, page 62

View details of your schedule in textual view, page 15

View your group's schedule in textual view, page 19

View your group's schedule in multiday view, page 23

Create a shift swap request

You can send another employee a swap request. When you create the request, you have many options including whether to swap a shift or non-work time, swap one-way or two way, and swap a full shift or partial shift.

A swap request is a contract between two employees, and has to be approved by a manager.

Alternate way to swap a shift

If you prefer, you can create a posting for the swap board. A posting can be picked up by anyone that can view the swap board.

Procedure

1. Go to **My Home.** Under **My Requests,** select **My Requests**.
2. Select **Create New Request**.
3. Select **Shift Swap**.

   The Shift Swap form is displayed with the multiple default values. You may want to keep some values and change others. The form changes if you make the following changes:
4. In the posting statement list, select the swap type, date (for non-Work Time), and the type of swap (one-way or two-way swap).
5. Shift swaps only: To determine shift swap duration, do one of the following:
   - Select entire shift and the date.
   - Select partial shift and the start and ending dates and times.
6. Select the date and time that the posting will expire.
7. To determine who submits the swap request to the manger, do one of the following:
   - Select whether the employee willing to swap must send the request to you.
   - Select whether the employee willing to swap can send the request directly to the manager.
8. Optional: Add comments for employees viewing this posting.
9. To save your changes, select **Save**.
10. When finished with the request, select **Done**.

    The request is added to each employee's My Request page.

Related topics

Shift Swap request form, page 53

Create a swap board posting, page 48

View and manage your requests, page 62

Shift Swap request form

To create a shift swap request for a specific employee, complete and submit the Shift Swap request form.

Section	Description
Shift Swap Specification	States employees' shifts to be swapped. Shift information includes shift type and date, and whether the shift is being proposed for swap as an entire unit, or if a portion of the shift (partial shift swap) is offered. For two-way swaps, employees can also specify if they want to accept an entire shift in exchange or if they will accept a partial shift swap. Only one date is required for a one-way swap.
Expiration	If the shift swap is in negotiation, this field enables an employee to specify when the negotiation expires. Otherwise, it states when the request expires.
Feedback option	This option is only available while the request is still being negotiated. Allows employees to specify whether or not they need to approve the shift swap prior to the request going to management for approval.
Negotiation Comment	This option is only available while the request is still being negotiated. Employees can use this field while participating in the shift swap to provide feedback to each other for negotiation.
Submit request to manager	This option is only available while the request is still being negotiated. You must be one of the employees participating in the shift swap. It also requires that the employee you are swapping your shift with has indicated on their request form that you can submit the request for approval without their confirmation.

Related topics

Swap Board posting form, page 50

Swap Board posting list, page 49

Create a flex time request

You can create a flex time request to take off during an approved shift and specify a corresponding shift extension to make up the time taken.

Before you begin

Decide when you want to make up your time. You need to decide the date and whether you want to make up your time before your shift, after your shift, or during a gap.

Procedure

1. Go to **My Home**. Under **My Requests**, select **My Requests**.
2. Select **Create New Request**.
3. From the **Create New Request** pop-up window, select **Flex Time**.
4. From the **Time Off Type** (activity) list, make a selection.
5. Optional: Add a comment.
6. In the **Time Off Choice** section, select the calendar icon to specify the date range for the flex time.
7. In the **Flex Makeup** section, do the following:
   a. Select the **Select Date** icon and select the month, day and time for the makeup time.

      If the employee has a shift scheduled, by default, the **Duration** field contains 0.15 and the **Hours Accounted** contains 00:15 at the end of the current shift.

   b. From the **Extension** list, select a make up option.
   c. From the **Activity** list, select an activity.
   d. Select the **Duration** of the time that will be spent making up the time taken off before the scheduled shift.
   e. In the **Makeup Gap** field, select the desired gap (space) between the start of the shift gap and the start of the makeup time.

      For example, the scheduled shift has a Gap from 2:00 to 4:00 with a Makeup Gap of 1 hour. The employee is making up 30 minutes. Therefore, the Makeup Shift starts at 3:00.

8. Select **Add** to define another Flex Makeup event if some of the time to be made up takes place on multiple days, in a different extension, or in different gaps on the same day. For each Flex Makeup event, you must specify a date and enter the applicable **Extension Before Shift**, **Extension After Shift**, or **In Gap** information.
9. If you need to check the accrual of **Time Off**, select **Calculate Estimate** before saving the request.
10. Select **Save**.

    Any alerts that indicate messages relating to the request display in the lower, left area of the page.

> Before saving the request, ensure that the **Hours Accounted** in the **Time Off Choice** section equals that **Hours Accounted** in the **Flex Makeup** section. Otherwise, you will receive an error when you try to save the request, as the **Hours Accounted** must be equal in both sections of the request.

11. When all changes have been completed, select **Done**.

Related topics

Flex time request form, page 55

Flex time request form

Use the flex time request form to create a request to take time off during an approved shift, and specify a corresponding shift extension to make up the time taken.

Field	Description
Request Summary	
Employee Name	Name of the employee. *This field is available when someone is creating the request for an employee.*
Time Off Type	Indicates the time off type (activity) for this request.
Add Comment	Text of any comments added by the manager or employee.
Time Off Choice	
(*start date*)	Calendar icon is available for selecting the start date and time of the time off.
(*end date*)	Calendar icon is available for selecting the end date and time of the time off.
Length	Displays the duration of the requested time off.
Hours Accounted	Displays the number of the employee time off hours in the request. For example: • A flex time request is for three hours • One of the three hours is over lunch Therefore, the time listed in this column is 02:00.
Time off Calendar	
(*month and year selectors*)	Changes the starting month of the time off calendar. By default, the current month and year are selected.
Legend button	Shows the legend for the time off calendar.
(*calendar*)	Shows the calendar for the selected starting month and year.
Flex Makeup	

Field	Description
(*date selector*)	Date of the makeup time.
Shift information	
Name	Shift name.
Start	Time the shift starts.
Activity	Activity for the shift.
Duration	Total length of the shift.
Flex Makeup information	
Extension	Indicates when the makeup time will occur.
Activity	Indicates the activity during the makeup time.
Duration	Indicates the duration of the makeup time.
Makeup Gap	Indicates the desired gap between the start of the shift gap and the start of the makeup time.
Hours Accounted:	The hours in this section must match the Hours Accounted in the Time Off Choice section.
Alerts	
Alerts	When applicable, alerts are displayed.
Description	Description of the alert.

Related topics

Create a flex time request, page 54

Request additional shifts and shift changes

Using the Shift Request and Change form, you can request shift on days you are not scheduled to work. You can also request changes to your existing shifts.

You can create and submit the following types of shift requests:

- Extra shits for days you are not scheduled to work.
- Change your shift start time.
- Choose different shifts.
- Create overtime requests.
- Request to add overtime extensions, or regular time extensions at the start or end of your existing shifts.
- Request to withdraw approved shifts or shift changes.

Procedure

1. Go to **My Home**. Under **My Requests**, select **My Requests**.
2. Select **Create New Request**, then select **Shift Request & Change**.
3. Optional: Do one of the following:
   - To request a new shift:

   a. Use the **Select date** icon to select a start date.

   b. Use the **Select time** icon to select a start time.

   c. Use the **Activity** menu to select a shift activity.

   d. If you are requesting overtime, select the **Mark Entire Shift as Overtime** box.

   e. Add a comment if necessary.
   - To request an extension before an existing shift:

   a. Use the **Type** menu to select what type of overtime extension you are requesting.

   b. Use the **Activity** menu to select a shift activity.

   c. Use the **Gap** menu to select the length of time between the end of the shift extension, and the start of your scheduled shift.

   d. If you are requesting overtime, select the **Overtime** box.
   - To request an extension after an existing shift, do the following:

   a. Use the **Type** menu to select what type of overtime extension you are requesting.

   b. Use the **Activity** menu to select a shift activity.

   c. Use the **Gap** menu to select the length of time between the end of your scheduled shift, and the start of the shift extension.
   - To request an extension during a gap between shifts, do the following:

   a. Use the **Gap** menu to select an available gap during your shift.

   b. Use the **Type** menu to select what type of overtime extension you are requesting.

   c. Use the **Activity** menu to select an Activity type.

   d. Use the **Extension Gap** menu to indicate your desired duration between shifts.
4. When finished, select **Save**.

Related topics

[Shift Request & Change form], page 59
[View details of your schedule in graphical view], page 17
[View your group's schedule in graphical view], page 21

Shift Request & Change form

Use this form to create a request a new shift or to change an existing shift.

Shift section

Setting	Description
Employee Name	Only available when someone is creating a request for an employee.
Start Date	Indicates the start day of the shift. After a day is selected, the system can determine whether the request type is: • **New Shift** (if there is not already a shift on that day) • **Shift Change** (if there is already a shift on that day) Whenever you change the day, the rest of the page is reloaded with the details for that day.
Start Time	Indicates the start time of the shift. By default, this option can be used to either set or change the start time of the shift. Shift changes only: If the **Start Time** box is unavailable, it means that your system administrator has chosen to prevent changes to the start time on existing shifts.
Shift	Lists the available shifts for selection using your available work patterns, and the shift already assigned to you on that day (if any).
Duration	Numeric read-only box. This option is pre-populated with the duration from the work pattern of the selected shift.
End Date	Read-only date/time display calculated dynamically using the start date, start time, and duration.

Setting	Description
Activity	List of activities available to be requested. For a New Shift request: • When the dialog is opened from the Net Staffing ribbon on the schedule page, it only lists activities that have a Net Staffing shortage. • The default selection is the activity linked to the queue with the greatest shortage. However, when coming from the Requests page, there is no Net Staffing context, so you can request any activities at any time. In addition to listing the available activities, the list also includes the activity that the employee is already scheduled for on that day (if any). You cannot change the activity for a Shift Change request.
Mark Entire Shift as Overtime	Marks the entire shift as overtime (OT). When checked, the **Extension Before Shift** and **Extension After Shift** sections are *not* available, and you are not able to request an extension to the shift.
Add Comment	Allows you to add comments about the shift request.

Extension Before Shift section

Field	Description
Type	Specifies the type of shift request.
Activity	Specifies the activity for the extension.
Duration	Numeric read-only box. This option is pre-populated with the duration from the work pattern of the selected shift.
Gap	Specifies the length of time between the shift and the extension.
Overtime	Indicates whether this request is overtime.

Extension After Shift section

Field	Description
Type	Specifies the type of shift request.

Field	Description
Activity	Specifies the activity for the extension.
Duration	Duration of the extension.
Gap	Desired gap (space) between the requested shift extension and shift start time.
Overtime	Indicates whether this request is overtime.

Extension During Gap section

Field	Description
Gap	Available gaps which are based on gaps in the shift scheduled for the day.
Type	Overtime extensions which are based on your available work patterns.
Activity	Available activities which are based on the activities in the shift and activities for the OT template selected in the Type field.
Duration	Duration of the extension.
Extension Gap	Desired gap (space) between the start of the original shift gap selected for the extension and the start of the extension.

Alerts section

Field	Description
Alerts	Alerts configured for this request.
Description	Details of the alerts.

Related topics

Request additional shifts and shift changes, page 57

View and manage your requests

You can view and manage your requests from one location. For viewing your requests, options are available to change which requests are included in the list. For managing your requests, you can view the details of all request types. Other options for managing requests are available, but they vary based on the type and status of the request.

Procedure

1 Go to **My Home.** Under **My Requests,** select **My Requests.**

The My Request page is displayed. By default, all non-expired requests are included in the list.

2 Optional: To change what you can view in the request list, do the following:

- To view a single request type, make a selection from the **View** list.
- To view expired requests in the list, select the **include expired** check box.

3 Optional: Do one of the following:

- To manage your requests, from the **Actions** column, select one of the icons.
- To view the status of your request, see the **Status** column.

Point to an icon in the Status column to view its meaning.

Point to an icon in the Action column to view its purpose.

Related topics

My Requests page: All view, page 62
My Requests page: Time off view, page 63
My Requests page: Flex Time view, page 64
My Requests page: Shift Swap view, page 66
My Requests page: Shift Bidding view, page 67
My Requests page: Shift Request and Change view, page 68

My Requests page: All view

Use the My Requests page to view requests, process requests, and create a request.

The All view shows only the columns common to multiple requests type. This view excludes withdrawn, and invalid requests. The All view is the default view.

Column	Description
Status	Icon showing the status of the request. The name of the status is displayed when you point to the icon. Statuses include: approved, pending approval, tentatively approved, withdrawn, waitlisted, denied, escalated, expired, in negotiation, and invalid.

Column	Description
Type	Type of request.
Submitted	Date the request was submitted.
Last Modified	Date the request was last changed.
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the system, manager, or employee.
Alerts	Icons showing which request validation rules are violated, as a result of this request. The rule details are displayed when you point to the icon.
Actions	When selected, icons allow you to change, withdraw, and view details of a request.

Related topics

View and manage your requests, page 62
My Requests page: Time off view, page 63
My Requests page: Flex Time view, page 64
My Requests page: Shift Swap view, page 66
My Requests page: Shift Bidding view, page 67
My Requests page: Shift Request and Change view, page 68

My Requests page: Time off view

The My Requests page has the following columns when the Time Off view is used.

Column	Description
Status	Icon showing the status of the request. The name of the status is displayed when you point to the icon. Statuses include: approved, pending approval, withdrawn, waitlisted, denied, escalated, expired, in negotiation, and invalid.
Type	Display the type of request.
Submitted	Date the request was submitted.
Start Date	Time stamp of the beginning of the requested time-off.

Column	Description
End Date	Time stamp of the end of the requested time-off.
Length	Duration of the requested time-off.
Hours Accounted	Number of the employee time-off hours involved in the request.
Choice Alerts	Each possible choice for a time-off request is validated independently. For each failed validation, this area shows the icon and description of the validation, similar to that described in the previous section on the alerts information.
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the system, manager, or employee.
Alerts	Icons showing which request validation rules are violated as a result of this request. When you point to the icon, the rule name is displayed.
Actions	Icons that you can click to apply an action to the request. To display the icon name, point to it.

Related topics

View and manage your requests, page 62
My Requests page: All view, page 62
My Requests page: Flex Time view, page 64
My Requests page: Shift Swap view, page 66
My Requests page: Shift Bidding view, page 67
My Requests page: Shift Request and Change view, page 68

My Requests page: Flex Time view

The My Requests page has the following columns when the Flex Time view is used.

Column	Description
Status	Icon showing the status of the request. The name of the status is displayed when you point to the icon. Statuses include: approved, pending approval, tentatively approved, withdrawn, waitlisted, denied, escalated, expired, in negotiation, and invalid.
Submitted	Date the request was submitted.

Column	Description
Type	Column is available to display the type of request when the View is **No Filter** or a filter is used to view either Time Off requests or Shift requests.
Time Off Start Date	Time stamp of the beginning of the requested time-off.
Time Off End Date	Time stamp of the end of the requested time-off.
Time Off Length	Duration of the requested time-off.
Hours Accounted	Number of the employee time-off hours in the request. For example: • A flex time request is for three hours • One of the three hours is over lunch Therefore, the time listed in this column is 2.
Makeup Start Date	Time stamp of the beginning of the makeup time.
Makeup End Date	Time stamp of the end of the makeup time.
Makeup Activity	Activity to be completed during the makeup time.
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the system, manager, or employee.
Alerts	Icons showing which request validation rules are violated, as a result of this request. The rule details are displayed when you point to the icon.
Actions	Icons allowing you to change, deny, withdraw, view further details about the request.

Related topics

View and manage your requests, page 62

My Requests page: All view, page 62

My Requests page: Time off view, page 63

My Requests page: Shift Swap view, page 66

My Requests page: Shift Bidding view, page 67

My Requests page: Shift Request and Change view, page 68

My Requests page: Shift Swap view

The My Requests page has the following columns when the Shift Swap view is used.

Column	Description
Name	Name of the employee requesting the swap and the employee who received the swap request.
Status	Icon that indicates the status of the request. When you point to the icon, the name of the icon is displayed.
Shift Date	Date of the shift offered in the swap request.
Start	Start time of the shift in the swap request.
End	End time of the shift in the swap request.
Post Expires	Date and time the shift swap request expires.
Confirm	Indicates whether a confirmation is required.
Swap Type	Image that indicates whether the swap was a one-way or two-way swap.
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the system, manager or employee.
Alerts	Icons showing which request validation rules are violated as a result of this request. When you point to the icon, the rule name is displayed.
Actions	Icons that you can click to apply an action to the request. To display the icon name, point to it.

Related topics

View and manage your requests, page 62
My Requests page: All view, page 62
My Requests page: Time off view, page 63
My Requests page: Flex Time view, page 64
My Requests page: Shift Bidding view, page 67
My Requests page: Shift Request and Change view, page 68

My Requests page: Shift Bidding view

The My Requests page displays information that is specific to shift bidding requests and information that is common to all requests.

Column	Description
Bid Name	Name given by the employee when the request was created.
Status	Indicates the status of the preference for that shift bid. • **Pending**: Bid preference has been submitted. • **Saved**: Bid preference has been saved, but not submitted. • **Edited, Saved**: Bid preference was previously submitted, but has been changed and saved. The new bid preference has not yet been submitted. • **Denied**: The bid preference was submitted and denied. The preference cannot be changed. (The status can be viewed on the Employee Requests page and the My Requests page.) • (**No status shown**): A status in not available when the bid preference has been entered, but has not been saved. The preference can be changed.
Preference	Indicates the preference assigned to the shift bid when the request was created.
Use Points	Indicates whether the employee has chosen to use accumulated bonus points in the bid.
Submitted	Number of bids submitted.
Expired	Indicates whether the bid has expired.
Comments	Text of any comments added by the system, manager, or employee.
Alerts	Icon representing each validation rule violated by this request. Rule details are displayed when you point to the image.
Action	Icons that can be selected to edit, withdraw, or view details of the request.

Related topics

View and manage your requests, page 62

My Requests page: All view, page 62

My Requests page: Time off view, page 63

My Requests page: Flex Time view, page 64

My Requests page: Shift Swap view, page 66

My Requests page: Shift Request and Change view, page 68

My Requests page: Shift Request and Change view

The My Requests page has the following columns when the Shift Request and Change view is used.

The values displayed for shift requests and changes only reflect the *difference* from what was originally scheduled.

For example, if only the shift start time changes, *none* of the other columns display a value. you see the change request only, and *not* the original shift settings.

Column	Description
Status	Icon that indicates the status of the request. When you point to the icon, the name of the icon is displayed.
Type	New shift or shift change.
Campaign	Name of the campaign to which the user is assigned during the start of the request.
Submitted	Date the request was submitted.
Start Date	Start date and time of the request. The date and time includes any overtime before or after the shift. For requests to change an existing shift, only the changes are reflected. For example, a request to extend a shift would only include the extension date and time, not the already scheduled shift.
End Date	End date and time of the request.
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the system, manager, or employee.
Alerts	Icons showing which request validation rules are violated as a result of this request. When you point to the icon, the rule name is displayed.
Actions	Icons that you can click to apply an action to the request. To display the icon name, point to it.

Related topics

View and manage your requests, page 62

My Requests page: All view, page 62

My Requests page: Time off view, page 63

My Requests page: Flex Time view, page 64

My Requests page: Shift Swap view, page 66

My Requests page: Shift Bidding view, page 67

Chapter 4

Tracking your time

My Time allows you to view your scheduled activities. It allows you to view a record of your actual activities, and to see how well you conform to your assigned schedule.

Topics

View your time schedule

When required, you can view the activities that have been assigned to you for any day of your schedule.

You can also change your current activity on this page, but you cannot see those changes unless you are viewing the Time Record page.

Procedure

1 Go to **My Home**. Under **My Time**, select **Schedule**.

2 Optional: Do the following:

- To change the date of the time schedule you are viewing, select the **Select Date** button.
- Management can amend your schedule while you are viewing this screen. To refresh schedule information, select **Refresh.**

3 Optional: To change your current activity, do the following:

a. Select an **Activity Type,** and an **Activity** from the menus.

b. Select **Start Activity**.

c. Repeat steps a and b whenever you need to change your activity.

d. To end your shift for the day, select **End Shift**.

Related topics

Record your daily activities, page 73

View your time schedule, page 71

My Time Schedule page

Use this page to view your scheduled activities for the day.

Column	Description
Date	Date of schedule shown.
Time	Date and time of scheduled activity.
Activity Type	Type of activity scheduled.
Activity	Scheduled activity name.
Duration	Time allocated for the activity.
Activity Time Total	Total number of hours scheduled for the day.

The Activity Selection screen is visible on both this page, and the Time Record page. You can change your activity selection on the Schedule page, but you can only view changes on the Time Record page.

Related topics

My Time Schedule page, page 71

Record your daily activities

When you are working a shift, you can record the activities you are working on throughout the day. Recording your activities allows you to compare your actual activities, with your assigned activities to see how well you are adhering to your schedule. You can also record when you end your shift for the day.

Procedure

1 Go to **My Home**. Under **My Time**, select **Time Record**.

2 To record your daily activities, do the following:

a. Select an **Activity Type**, and an **Activity** from each menu.

b. Select **Start Activity**.

c. To change activity, repeat steps a and b.

3 To end your shift for the day, select **End Shift**.

This completes your current activity and logs you off the system.

4 Optional: To set a recurring refresh time, select from the **Refresh Rate** menu.

Related topics

View a history of your activities, page 75
Time Record page, page 73
View your time schedule, page 71

Time Record page

Use this page to record your activities throughout the day.

Column	Description
Time	Date and time of activity.
Activity Type	Type of activity recorded.
Activity	Activity name.
Duration	Total time spent on the activity.
Creator	• My Time indicates activities that you have manually recorded. • System indicates activities that have been scheduled for you.
Notes	Any notes entered when manually recording activities.

Activity Selection

Field	Description
Refresh Rate	Specifies how often the page is refreshed to show current Time Record.
Current Activity	Indicates the current activity selection.
Notes	Space to type any notes relating to the activity.

Related topics

Record your daily activities, page 73
View your time schedule, page 71
My Time Schedule page, page 71

View a history of your activities

When needed, you can view a history of your recorded activities.

Procedure

1. Go to **My Home**. Under **My Time**, select **Log History**.
2. Optional: To view a log history from a specific date range, do the following:
   a. To choose a start date and end date, use the **Select Date Range** icon.
   b. Select **Set**.
   c. To refresh the data, select the **Refresh** icon.

Related topics

Record your daily activities, page 73
Log History page, page 75

Log History page

Use this page to view a history of your activities.

Column	Description
Time	Date and time of the activity.
Activity Type	Type of activity recorded.
Activity	Name of activity recorded.
Duration	Total time spent on the activity.
Creator	• My Time indicates activities that you have manually recorded. • System indicates activities that have been scheduled for you.
Notes	Any notes entered when manually recording activities.

Related topics

View a history of your activities, page 75

View your adherence

To see how well you are conforming to your assigned schedule, view your adherence.

Procedure

1 Go to **My Home**. Under **My Time**, select **My Adherence**.
By default, the current date is displayed, and no auto-refresh is selected.

2 Review your adherence information.

3 Optional: Do one of the following:

- To view your adherence for another date, use the arrows or select the **Select Date** icon.
- To check for recent changes, select the **Refresh** icon.
- To set the data to be refreshed at specific intervals, use the **Refresh Rate** selector.
- To view the color legend, select the **Legend** button.

Related topics

View your adherence, page 76
Record your daily activities, page 73
View your time schedule, page 71

My Adherence page

This page shows your adherence data (how well you are conforming to your assigned schedule) in a graphic form. In addition, it shows a summary of the data for the day.

Column	Description
Refresh Rate *(only available for the current day)*	Available when date is set to the current day.
Scheduled	Your scheduled activities for the day.
Primary - ACD	Your actual activities for the day.
Exceptions	Indicates where you have performed activities outwith your schedule.

Summary

Column	Description
Approved Exception Hours	Hours outside your schedule that have been approved.

Column	Description
Unapproved Exception Hours	Hours outside your schedule that have not been approved.
Scheduled In-Office Hours	Hours that you have scheduled to be at work.
Exceptions during In-Office Hours	Hours where you have performed duties outwith your expected schedule during your work day.
Day's Adherence	Percentage of your shift where you have adhered to your expected tasks.

When the **My Adherence** page shows the current day, the **Summary** section displays as **Summary (up to now).** This includes all summary information up until the most recent data refresh.

Related topics

View your adherence, page 76

Tracking your workload

In My Tracking, you can review your upcoming work tasks, track workload volume, and view your workload volume history.

Topics

Review and update your work tasks

View active work items assigned to you to plan your work. When needed, you can update the status of a work item. You can also see when items are scheduled for completion, and plan your work load accordingly.

Procedure

1. Go to **My Home**. Under **My Tracking**, select **Tasks**.
2. Optional: To change the number of work items displayed on each page, use the pagination control below the task list.
3. Review your tasks.
4. Optional: For each work item, do one of the following:
   - After you have finished a work item, select **Complete**.
   - If you cannot complete the work item, select **Reject**. Then, you can specify a reason or add a comment.
   - To reactivate a work item that has been previously rejected or completed, select **Reactivate**
5. Optional: To refresh the data, select **Refresh**.

Related topics

My Tasks page, page 79

My Tasks page

Use this page to view your assigned work items.

Field	Description
Item	Work item name.
Queue	Queue the work item belongs to.
Estimated Age	Approximate number of days the work item has been open.
On Track	Indicates whether the work item is on track for completion.
Urgency	Urgency of the work item.
Estimated Start	When you should start working on the work item, in accordance with your schedule.
Estimated End	When it is estimated that you should finish the work item.

Field	Description
AHT	Activity Handling Time for the work item, in minutes.
State	Work item's current state.

Related topics

Review and update your work tasks, page 79

Track workload volume

Track your workload of various types as it arrives, is completed, and is backlogged throughout the day. View a summary of the work assigned to you, and view the status of each work queue's inventory.

Procedure

1. Go to **My Home**. Under **My Tracking**, select **Volume Entry**.

   Effective time for events is set to **Now** as the default option.
2. Optional: To view events from a selected time, click **Selected time**. Then, choose a date using the **Select Date and Time** icon.
3. Optional: Do one of the following:
   - To refresh the data, click **Refresh**.
   - To show work queues that your administrator has chosen to hide, click **Show Hidden**.

Related topics

Volume Entry, page 81

Volume Entry

Use this page to view a summary of the work assigned to you.

Work Queue Inventory Status

Type	Description
Arrivals	Team managers have the ability to add arrivals to work queues.
Inventory	Provides a net total of outstanding work for each work queue at your organization.
Check-Out	Work that you have checked out.
Check-In	Work that you have checked in.
Work-In-Progress (WIP)	Current net total of work that has been checked out.

Related topics

Track workload volume, page 81

View workload volume history

When needed, you can view a history of your assigned and completed work.

Procedure

1 Go to **My Home**. Under **My Tracking**, select **Volume History**.
By default, this page is set to show all events, and all work queues for the current week.

2 Optional: Do one of the following to change your view:

- To view volume history by event type, select from the **Type** list.
- To view a specific work queue, select from the **Work Queue** list.
- To view history for a specific period, use the **Select Date Range** icon.
- To refresh the data, select the **Refresh** icon.

Related topics

Volume History, page 82
Track workload volume, page 81
Volume Entry, page 81

Volume History

Use this page to view a history of your entered, and completed work.

Column	Description
Type	Type of event.
Time	Corresponding time an entry occurred.
Work Queue	Name of work queue.
Managed	Indicates whether the data management adapter has been run in that instance. If the event is an arrival, this indicates if it has been converted into a volume for that work queue.

Related topics

View workload volume history, page 82
Track workload volume, page 81
Volume Entry, page 81

Setting your personal information

In My Information, you can view your personal profile. The system generates most of your profile, but if required, you can update your personal details. You can also set your schedule preferences for upcoming shifts, and change your password.

Topics

Specify your shift preferences

For upcoming shifts, you can specify your preferences for start time, days off, and overtime and voluntary time off.

These preferences are taken under consideration when scheduling shifts, but are not guaranteed.

Procedure

1. Go to **My Home**. Under **My Information**, select **Schedule Preferences**.
2. To set your start time preference, do the following:
   a. For the first day, use the **Select Time Range** icons to select a first, second, and third start time preference.
   b. Select **Set**.
   c. Repeat steps a and b until you are finished.
   d. Specify whether you would prefer to start early, late, or have no preference.
3. To set your day off preference, do the following:
   a. Select a day under the **Day Off Preference** section, and use the arrows to move to the **Preference** box.
   b. Repeat step a in order of day off preference.
   c. Specify whether you place most importance on your day off preferences, or start time preferences.
4. Under the **Overtime and Voluntary Time Off Preference** section, use the arrows to select an answer to each question.
5. Select **Save**.

Related topics

Schedule Preferences page, page 84

View details of your schedule in textual view, page 15

View details of your schedule in graphical view, page 17

Schedule Preferences page

Schedule preferences define your preferred shift, and time off requirements for upcoming schedules.

Start Time Preference

Setting	Description
Day	Day of the week you are selecting preferences for.
First preference	Your most preferred shift preference for the selected day.

Setting	Description
Second preference	Your second most preferred shift preference for the selected day.
Third preference	Your third most preferred shift preference for the selected day.
In general, would you prefer to start early or late?	Answering this question indicates whether you would prefer early, or late shifts for upcoming schedules.

Day Off Preference

Setting	Description
Week day	Days of the week.
Preference	Days of the week in order of day off preference.
Is it more important to you to have your preferred day off or to start work at the time you prefer?	Answering this question indicates whether you would most prefer your day off preferences, or your start time preferences to be considered when scheduling your upcoming shifts.

Over Time and Voluntary Time Off Preference

Setting	Description
Over Time Before Shift	Asks whether you would prefer to have overtime at the beginning of your scheduled shifts.
Over Time After Shift	Asks whether you would prefer to have overtime at the end of your scheduled shifts.
Voluntary Time Off at Shift Start	Asks whether you would prefer time off at the beginning of your scheduled shifts.
Voluntary Time Off at Shift End	Asks whether you would prefer time off at the end of your scheduled shifts.

Related topics

Specify your shift preferences, page 84

View and update your profile

When required, you can view your personal information. If any details are incorrect or have changed, you can update your personal details.

Procedure

1 Go to **My Home**. Under **My Information**, select **Personal Profile**.

2 Review each section, and make changes as needed.

3 If you make any changes, select **Save**.

Related topics

Personal Profile page, page 86

Change your password, page 89

Personal Profile page

Your Personal Profile is where you can see your personal details, and contact information.

Name and birth date section

Field	Description
(name fields)	Your last and first names, middle initial, and suffix.
Birth Date	Your date of birth.

Contact Information section

Field	Description
Email	Work email address.
Desktop Messaging Username	Username for desktop messaging.
(phones)	Work, home, and cell phone numbers.

Home Address section

Field	Description
(address 1–3)	Your home address.

Field	Description
City	Your city.
State	Your state.
Zip/Postal Code	Your postal code.
Country	Your country.

Time Off Type section

Field	Description
Time Off Type	Lists time off types defined for the organization.
Default Per Day	When a time off request is for one day, this value is the number of hours used for that day.
Default Per Week	When a time off request is for multiple days, this value is the maximum number of hours that can be taken during a seven day period.
Accrual Schedule	If the time off type (activity) was created with **Time Off With Accrual** selected, the accrual schedule is listed.
Balance	Current balance of hours.
Date Last Updated	Date that the time off balance was last updated.
Maximum Balance	Maximum number of hours an employee can accrue for each time off type.
Maximum Carryover	Maximum number of hours that can be carried over based on the accrual schedule. (Time off balances are carried over automatically.)
Accrual Rate	The rate for the accrual schedule. Example: If the Accrual Schedule for this activity is a year, four years are available for entering the accrual rate.

Administrative Details section

Field	Description
Start Date	Date you started with the company.
End Date	Your employment end date if applicable.

Field	Description
Is Supervisor	Box is checked if you are a supervisor.
Is Team Lead	Box is checked if you are a team lead.
Employee type	Indicates whether you are a full-time or part-time employee.
Employee ID	Your identification number.
Tax ID (SSN)	Your tax identification number.
Wage Amount	Your wage rate.
Rank	Your numeric rank in the company.
Organization	Organization that you belong to within the company.
Supervisor	Name of your supervisor.
Team Lead	Name of your team lead.
Job Title	Your job title.

Data Source section

Field	Description
Employee ID	Your Employee IDs for data sources.
Extension	Your extension numbers for phone data sources.

Sign-in Data section

Field	Description
Username	Your username.
Password	Field where you can change your password.

Related topics

View and update your profile, page 86
Change your password, page 89

Change your password

You can change your password at any time, but you may be prompted to change your password periodically.

Procedure

1. Go to **My Home**. Under **My Information**, select **Personal Profile**.
2. Under the **Sign-in Data** section, on the right of the **Password** box, select the **Set Password** icon.
3. In the **Old password** box, type your current password.
4. In the **Password** box, type a new password.
5. In the **Confirm password** box, type your new password again.
6. To save your new password, select **Set**.

Related topics

View and update your profile, page 86
Personal Profile page, page 86

Verint Global Headquarters
175 Broadhollow Road
Suite 100
Melville, NY 11747 USA

info@verint.com
1-800-4VERINT

www.verint.com

VERINT®

Glossary

A

Active Directory

One of the main user authentication methods supported in the system, allowing customers to leverage Windows Authentication as the authentication mechanism in the system. When Windows authentication is defined, the Single Sign-On (SSO) mechanism can be used to allow all users to access and log in to the system from one centralized, secure, single access point.

Active Directory Validation Tool

Pre-deployment tool used to validate Windows authentication (LDAP) and SSO settings.

Activity

Represents the types of work an employee can perform in Workforce Management, but also include other states, such as a break, meeting or anything else a person may be tracked doing during the workday.

Activity Types

Used to categorize activities for sorting and grouping. Simplifies activity selection of activities. Some example predefined activity types include Absence Activities (such as vacation or jury duty), and Assigned Work Activities (such as phone or research).

Adherence

Measure used in WFM to determine how well an employee’s scheduled activities match their actual, real-time activities.

Adherence Mapping

Entity in WFM that allows users to select alternate activities that are considered in adherence when an employee is scheduled for a particular activity. For example, if an activity called Email is mapped to the scheduled activity AnswerCalls, employees are considered in adherence if they are performing either activity.

Alarm Service

Main alarm component that is located on system servers. The Alarm Service processes alarms and uses the alarm configuration to determine whether to send an SNMP trap to an SNMP node, or send an email to a particular person to provide a notification that the alarm has been triggered. The Alarm Service also relies on the alarm configuration for other aspects of alarm processing, such as determining the priority to assign to the alarm and whether to implement trigger delay.

Analytics Engine

Component of the Speech Analytics Service that, together with the SpeechCat component, retrieves themes data from the Speech Analytics Database and generates updated data for the Speech Portal.

Annotations

Textual comments appended to an interaction that may optionally include links to external resources, such as an external server maintained by the customer. Users can define and add an annotation to an interaction during playback.

Application Analysis

Application Analysis allows DPA admin users to obtain, monitor and report on employee desktop application usage statistics.

Application Event Triggering

DPA Application Event Triggering allows DPA to recognize events that occur in software applications on employee desktops and to use these occurrences to trigger other actions.

Assessment

Use to review the customer’s experience with your contact center for a specific contact (aggregation of one or more interactions). If the customer interacts with more than one employee in the same phone call (multiple interactions), the system attaches the assessment to the contact’s first interaction.

Assignment Manager

Interactions application that allows administrators to define user access permissions and scope of the Interactions and Analytics applications. Administrators define the scope of what users can do in the Interactions and Analytics applications based on user groups and role affiliations defined in the system.

Audit Trail

Mechanism that provides a record of the actions performed in the Recording Framework Applications. Audit Trail allows contact centers to track who logged into the system, performed a search, played back interactions, evaluated or flagged interactions, assigned and completed training materials, and deleted items from the application.

Audit Viewer

Tool that displays audit trail information.

C

Campaign

Grouping of resources and organizational rules in WFM that targets a specific work load in the form of a schedule.

Canned ontology

Default ontology used in Speech Analytics that is imported to the customer’s system before the Training process is performed.

Category

Speech Analytics: Grouping of calls in Speech Analytics that pertain to specific business issues among all transcribed interactions. Categories in Speech Analytics are defined by a combination of the following: - Category filter: Specific call attributes about the interaction (such as duration of the call, financial impact of the business issue, etc.). - Category terms: Specific words, phrases or combinations of each spoken during the agent-customer conversation. Examples of Speech Analytics categories include: Customer Complaints, Billing Issues, Product Feedback, or Repeat Calls). Text Analytics: A user-defined content type to structure and monitor business issues. Because a category can incorpate other content types such as themes, relations and topics, free-text and sentiment, they can be used for trend, content, and interaction-transcript analysis.

Category Trends

Type of trend in Speech Analytics that shows how the numbers in specific categories fluctuate over time.

CCD

Conditional Custom Data fields that enable customers to tag interactions with additional information not available directly from other sources, such as a CTI, but derived from the values in other data fields. CCD fields contain predefined values that are based on customized rules defined by the System Engineer (SE).

CD

Custom Data fields that enable customers to create customized sets of data that can be used for marking, alongside the data obtained from the customer's recording environment. For example, an enterprise may want to tag an interaction with an indication of the line of business to which it belongs, when this data is not available from the CTI.

Centralized Log Collector

Component that enables the Enterprise Manager (EM) to collect logs (and other files) from servers within the Enterprise. This provides the Field Engineer with a way to retrieve log files from all servers via the EM, so they do not need to connect to each server to get them individually.

CF

Customer Feedback product in the system that provides a highly reliable, scalable and flexible voice and Web/email system for conducting intelligent and dynamic postcall and post contact surveys.

Channel

See Project.

Coaching

Application that provides a method of directing, instructing and training a person or group of people, with the aim of achieving a set goal or developing specific skills.

Collection

A Collection is a group of back-office Contributions from one or more employees connected to a single customer or account captured by DPA. Collections are used for analyzing and improving back-office efficiency and quality.

Conditional Custom Data

Data fields that enable customers to tag interactions with additional information not available directly from other sources, such as a CTI, but derived from the values in other data fields. CCD fields contain predefined values that are based on customized rules defined by the System Engineer (SE).

Consolidated Deployment

The smallest deployment (also called a single box solution), where the two logical zones, Data Center and Site, reside on the same physical server.

Contact

A customer's entire communication experience with the enterprise, from beginning to end. For example, a contact can be a phone call that starts from when the enterprise answers a customer's call, to when the customer hangs up the call. A contact can include one or more interactions (which is a individual communication session between one employee and the same customer). NOTE: A contact center normally focuses on the individual interaction that makes up a contact. Contacts are normally used to understand customer sentiment (that is, purpose of the call, SMS, chat, email).

Contact Database

Server role in the Data Center that includes long-term interactions. The Contact Database is optimized for searching operations, and interactions are inserted and updated in bulk operations.

Contact OLTP Database

Server role in the Data Center that is used to upload (known as marking) recorded interactions and interaction metadata for short-term storage management. After a predefined time interval, the Contact OLTP Database sends the recording data to the Contact Database for long-term storage management.

Content Server

Server role in the Site zone that uses an HTTP/HTTPS Web-based file retrieval component to search for interactions. The content server's search is triggered by the Locator, which is the Interaction Applications' DLL.

Content type (Text Analytics)

The classification of the unstructured raw data from different channels into well-defined semantic types based on the ontology. Content types are system- or user-defined. In the Text Analytics Application, themes, topics, and relations are examples of predefined content types, while categories are examples of user-defined content types.

Contribution

A Contribution is an item of work done by an employee that is connected to a single customer, or account captured by DPA. Contributions are used for analyzing and evaluating individual items of work for back-office efficiency and quality.

Cradle-To-Grave

A feature that follows and captures the customer experience across a single call, which may have been transferred to different agents a number of times. Cradle-to-Grave includes various features which capitalize on the resulting interactions and interaction-level information. By default, the system supports cradle-to-grave within the scope of a single data source within a single Integration Service. It is possible to configure the system for Custom Data gathering mode in order to provide for cradle-to-grave playback. An additional supported option is the Enterprise Cradle to Grave postprocessing database job, which actually combines interactions into a single appended contact with appended contact-level information in the Contact Database.

Custom Data

Fields that enable you to create customized sets of data that can be used for marking, alongside the data obtained from the your recording environment. For example, an enterprise may want to tag an interaction with an indication of the line of business to which it belongs, when this data is not available from the CTI.

Customer Feedback

Product in the system that provides a highly reliable, scalable and flexible voice and Web/email system for conducting intelligent and dynamic postcall and post contact surveys.

Customer Feedback Survey

Server role in the Site zone that allows creating and managing short, context-sensitive surveys to capture data immediately after the customer's interaction with agents. Surveys are delivered to customers based on defined rules.

D

Dashboard

Suite-wide unified dashboard that provides a single, quick view of valuable information across multiple applications.

Data Center Redundancy

The main Data Center redundancy solution includes a deployment scheme and software procedures that an enterprise employs to ensure the continued availability of a Data Center, in the event of a natural disaster or unexpected catastrophic event, such as an explosion or a fire. In this redundancy solution, the enterprise maintains two Data Centers: - Active Production Data Center: Current, functioning Data Center - Secondary (or Standby) Data Center: Data Center that functions in passive, standby mode until an administrator performs a switchover procedure when a disaster occurs, which switches over the Secondary Data Center to become the Active Data Center. Alternatively, Data Center high availability can be implemented by leveraging technologies such as storage replication and virtualization to allow relocating a single site to another geographical site in an efficient manner.

Data Center Zone

Logical deployment zone that serves as the centralized, single point of access where application data and content metadata is accessed, managed and maintained.

Data set (Text Analytics)

The set of interactions in the selected project on which to run analytics in the Verint Text Analaytics application. The dataset can is either all the interactions or a subset of interactions in the selected project.

Data Source

An abstract definition of a source of a contact state, device state, or agent state information that an integration will plug into, such as a customer's switch or a screen recording system. Data sources are used with various applications within the Enterprise Suite and Workforce Optimization Suite, such as Workforce Management, Scorecards, Interactions, and Speech Analytics.

Data Source Groups

Refers to the data source group name in WFM, which is an encompassing term for the identifier of an external record of data.

Database Management

Database Management is a server used for remote SQL deployments in L3 deployments and higher. It hosts the Database platform, which in this case only contains the application elements that normally run on this platform while the actual databases are located on the remote SQL server.

Database Purger

Database purge job that runs daily during off-peak hours, and purges the relevant data from the QM, Contact and Interaction Data Warehouse Databases.

Desktop and Process Analytics

Product in the system that captures events and data from employee desktops and makes them actionable.

Desktop Gadget

Optional feature, available on top of Scorecards, that provides a Desktop-based interface for employees to view their performance on their desktop.

Desktop Messaging

Application that allows a WFO administrator, manager, supervisor, or scheduler to send pop-up messages to employees by selecting the recipients' name, login or role within the organization. Alternatively, administrators can configure automatic messaging based on conditions, such as out of range KPIs or adherence issues.

Detection

Function of Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics). The system compares a caller’s voice to one or more voiceprints in a watch list to detect if a target is participating in a call. For example, if the voice of a caller closely matches one of the voiceprints in a watch list of people suspected of fraud, a Recorder Analytics Rule can be configured to alert the employee that a targeted person may be speaking on a call. The alert can provide additional instructions, such as telling the employee not to allow the caller to process transactions over the phone. See also: Verification

Diarization

The software-based process of separating mono audio containing the voices of two people into two separate audio streams, one for each person. Diarization occurs during automatic enrollment of customers in the Identity Authentication and Fraud Detection (IAFD) system.

DPA

Desktop Process Analytics is a product in the system that captures events and data from employee desktops and makes them actionable.

DPA Application

Server role in the Data Center that provides the Desktop and Process Analytics (DPA) application functionality.

DPA Database

Server role in the Data Center that stores data for the Desktop and Process Analytics (DPA) product.

DPA Next Best Action

Real-time scripting capability that effectively provides a desktop based rules engine that can process on screen data to provide next best action prompts to desktop users.

DPA Reporting

DPA reporting users can view predefined sets of Application Analysis, Event Triggering, and Process Analysis reports. The reports enable analysis of application usage, tracking of fired triggers, and analysis of the flow of events.

E

eLearning

Product that provides hard skills and soft skills training applicable for the entire agent life cycle (before, during, and after the hiring process), and includes training assessment and design tools.

EM

Enterprise Manager is a Java-based web application that serves as the primary administration tool for all of the managed servers deployed in an enterprise, including those deployed both in the Data Center and in remote geographical locations (or sites). The Enterprise Manager: - Provides a hierarchical view of all installations (the Installations tree user interface). - Handles configuration settings for all of the managed servers in the enterprise - Allows configuring Custom Data (Attributes) and Data Sources for managed servers and other applications - Connects to managed servers using HTTP (or HTTPS) and distributes configuration changes to the servers using a reliable messaging protocol - Monitors the managed servers to detect the installation of any new software on the servers, such as new server roles or components - Configures alarm behavior and collects alarm summary information from the managed servers - Launches applications on the managed servers that enable responding to and acknowledging alarms

EMA

Enterprise Manager Agent is a Java-based Web application that is installed on every system server and communicates with the Enterprise Manager regarding any configuration changes or alarm messages for the relevant server.

Emerging terms

Terms and phrases that the Analytics Engine considers meaningful in the context of the business domain, but have not been classified in the ontology.

Employee Quickview

View in Interactions that allows you to view information on the employee who participated in an interaction. The information includes a photo of the employee (if available), name, organization, KPI data, assigned eLearning lessons, and assigned coaching sessions. This information can be used to improve the performance of the employee.

End-to-End Encryption

Encryption solution in which the system encrypts files at the time of recording, and then stores them in an encrypted format throughout their entire life cycle. The files can be securely decrypted at the workstation for playback, if the specific right is granted. The system provides a robust and scalable encryption methodology. Files are encrypted with a certified industry-standard strong algorithm (AES 256). The end-to-end encryption solution uses the RSA security Key Manager Software for managing the generation, rotation, and archiving and retrieval of symmetric keys required by the AES algorithm.

Enrollment

Function of Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics). You enroll a person in voice biometrics, which can be an employee, a customer, or a target. After enrollment is complete, the system is able to assist with identity verification and watch list detection when that speaker might be on a call. The process of enrollment consists of providing all criteria required for verification or detection in the system. Criteria are call attribute metadata as well as recordings of the person’s voice, which create a voiceprint.

Enterprise Manager

Java-based web application that serves as the primary administration tool for all of the managed servers deployed in an enterprise, including those deployed both in the Data Center and in remote geographical locations (or sites).

Enterprise Manager Agent

Java-based Web application that is installed on every system server and communicates with the Enterprise Manager regarding any configuration changes or alarm messages for the relevant server.

Evaluation

Use to review employee performance for a specific interaction, including proficiency in handling interactions and delivering services to a customer. Evaluations can be forwarded to the employee for follow-up, together with the evaluator feedback (by flagging the evaluation).

Event

This term has different meanings, depending on the product: - Event in WFM: Refers to the record of information depicting the status of an employee in WFM, which may contain a time stamp of when the event occurred, as well as the employee identifier. - Event in Interactions: Refers to an action that takes place during an interaction that is automatically appended to interactions during recording, which is derived from the following event sources: - CTI events (such as hold, conference, start recording and alarms) - Recorder events (such as start recording)

Event Mode

Data source identifier of a specific event in WFM, which identifies an employee’s status. For example, the event mode, 5, may indicate that an employee is unavailable.

Event Reason

Data source identifier of a specific event in WFM, which, together with the Event Mode, further specifies an employee’s status. For example, the event mode, 5, could be the data source identifier for some kind of unavailability. The event reason, Lunch, further qualifies the data to mean that the employee has entered a state of unavailable because of their Lunch break.

Exception Interaction

Interactions marked by the system with an indication based on recording rules, for example an interaction whose duration is more than 10 minutes.

Export Manager

Optional product used when it is required to export recorded content (audio and metadata) from a system recording platform to an open file system for use by the customer or a third-party application.

F

Feedback Goal

Benchmark to rate the aggregated feedback received for specific jobs in an organization. Feedback goals consist of a percentage breakpoint for each rating category (Excellent, Good, Fair, etc.). The assigned percentage enables the system to grade the feedback received for the specific job titles. For example, for the job title, Agent, administrators can determine that the feedback goal for the rating, Good, is 80% (and the range is 80-89%). This means that if the aggregated feedback received for Agents is between 80% and 89%, the rating category for the job title, Agent, is Good.

File List Filtering

Filtering mechanism in Speech Analytics that supports the ability to bring in external metadata values from external source systems to categorize interactions within Speech Analytics. Users can enter up to half a million metadata values by entering these values in an external file and uploading it to the system to be used by the filter. Alternatively, to enter a limited amount of metadata values (up to 1024 characters), users can enter multiple metadata values in the filter field itself.

First User

The first user is an administrator account, that is created by the System Account, for a specific customer or Service Provider. The First User is used for system configuration, maintenance, and troubleshooting.

Flag Manager

Enables users to create and edit flags for interactions and evaluations. Administrators can create an unlimited number of flags and assign them to users in the Assignment Manager module. Flags are visible to different users according to the rights assigned to them.

Flags

Tracking mechanism in the Interactions and Analytics application that marks interactions and evaluations, to indicate that these entities need further attention and follow-up actions.

Forecasting and Scheduling Service

Server role in the Data Center that provides an intuitive desktop solution for managing and planning contact center activities. The Forecasting and Scheduling Service is functionality provided by the Workforce Management (WFM) product.

Forms

Tool used in the Interaction and Analytics application to evaluate employee performance, and to assess the interactions from the customer's perspective. Forms can be easily customized and tailored for different needs, allowing users to review the employee interaction with the customer, or the customer experience with the contact center, by completing a set of questions.

Framework Applications

Server role in the Data Center (formerly known as the Foundation-based application) that provides the system's core applications, including User Management, License Management, and Enterprise Manager, in addition to WFM, Scorecards, eLearning, Customer Feedback, etc. It is a mandatory server role in the system and required for all packages.

Framework Data Warehouse

Server role in the Data Center used to store Scorecard metrics and processed data for reporting purposes.

Framework Database

Server role in the Data Center (also known by its legacy name BPMain) that is a mandatory server role required by the system for all packages. The Framework Database is primarily used to store user, organization and group data, including user preferences and security data (roles, permissions, and license information). In addition, it stores operational data for Framework-based applications (such as WFM, Scorecards, Customer Feedback, Coaching, and eLearning).

Framework Integration Service

Server role in the Data Center required for Workforce Optimization (or Enterprise Suite) solutions that include Framework applications such as Workforce Management, Forecasting and Scheduling, Scorecards and eLearning. Once installed and activated, the Framework Integration Service is used to configure and run a variety of adapters, whose features are described in individual adapter guides.

FTS

Full-Text Search is functionality that lets users search for interactions according to specific terms or phrases included in interactions. Full-Text Search is performed on transcribed interactions and text interactions.

Full-Text Search

Functionality that lets users search for interactions according to specific terms or phrases included in interactions. Full-Text Search is performed on transcribed interactions and text interactions.

G

Group Hierarchy

Hierarchy set up by administrators (via the EM) that is structured according to a specific logical structure defined by the administrator.

H

High Availability

A system design approach and associated service implementation that ensures a pre-arranged level of operational performance will be met during a contractual measurement period. High availability is used in the system on both the sub-server level (disks, power supply, NICs, etc)., as well as on the server level (as in server redundancy configurations, such as N+N and N+M).

Hit/No Hit

Ratio based on statistics in Speech Analytics, in order to understand the number of interactions per agent that are associated with a specific category. Categories in Speech Analytics are defined by a combination of the following: - Category filter: Specific call attributes about the interaction (such as duration of the call, financial impact of the business issue, etc.). - Category terms: Specific words, phrases or combinations of each spoken during the agent-customer conversation. Hit represents the number of interactions per agent that match the category filters and contain the category terms. No Hit represents the number of interactions per agent that match the category filters, but do not contain the category terms.

I

Identification Rules

Part of Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics), an identification rule is a list of specific call attributes. Identification rules are used by Recorder Analytics Rules. Identification rules uniquely identify employees and customers for automatic enrollment and identity verification.

IDF

Industry-standard weight used widely in information retrieval that is used in relevancy-based searches in Speech Analytics. The Inverse Document Frequency weight is a statistical measure used to evaluate how important a term is in the index, which is based on the term's frequency in the index. IDF diminishes the weight of terms that occur very frequently, and increases the weight of terms that occur rarely. IDF is used only in multiple-term entries (such as credit debt payment), as the importance of the search is on the relevancy or power of the term within the index.

Import Manager

Server role in the Site zone that is used to import recorded content (audio and metadata) from external source systems into the recorder's local call buffer for system use and processing. The external source systems from which the Import Manager extracts the content includes the following: - OEM Recorders - Third-party Recorders via the Generic Adaptor

Inbox Folder

The Inbox folder provides access to the interactions required to meet a user's weekly or monthly evaluation quota. From the Inbox folder, you can also access all interactions that you have already evaluated, whether you accessed the interaction from the Inbox or by performing a search.

Index

Repository of transcribed interactions, which are used for analysis in Speech Analytics. All search, playback and analysis operations (excluding trends and customer behavior indicator analysis) are performed against this database).

Indexing

The process in Speech Analytics in which the Speech Application Service retrieves transcribed interactions, and builds a semantic index based on this data. Once the index is built, it is then exported to different databases in the system for use by other applications.

Installation Service Account

A system user account used for running software installation. This account must be assigned with local administrative rights for each of the servers.

Installations Tree

A graphical representation of the system in Enterprise Manager that includes Site Group, Site, Server, and Server Role nodes. Administrators can configure the servers in the system by selecting the Server or Server Role nodes in the left-hand pane of the Enterprise Manager, and making configuration settings in the right-hand pane.

Interaction

Speech Analytics: Represents a single part of the contact between one employee and the same customer. Text Analytics: The communication session between one or more employees and the same customer with a unifying contextual element, usually dictated by the channel infrastructure. For example, an email interaction is the complete thread of emails relating to the same subject.

Interaction Analytics Services

Server role in the Data Center that manages the Semantic Intelligence (Si) services for Speech Analytics.

Interaction Applications Server Role

Server role in the Data Center that provides the Interactions and Analytics applications, including Interactions and Speech Analytics.

Interaction Data Warehouse

Server role in the Data Center that is used to store recording, Quality Monitoring (QM), and Speech Analytics data for reporting purposes.

Interaction Flow Manager

Server role in the Data Center that is used to provide Interactions and Analytics post-processing services, including call distribution, Inbox selection, etc.

Interaction Metrics Distribution Report

Interactions report that displays the distribution of interactions across one specific metric. The Interaction Metrics Distribution Report displays the number of interactions for a specific metric. This enables users to quickly visualize how many interactions relate to a specific property.

Interactions

Product that assists contact centers increase operational effectiveness and improves the customer experience through full-time recording, powerful quality monitoring, compliance/liability management, rich reports, and an intuitive, dashboard-style interface. The application allows users to evaluate employees performance and assess recorded interactions from the customer’s perspective using customized forms. Users can also tag contacts and evaluations with one or more flags to indicate that these entities require further attention. These flags are used to push the contacts to corresponding folders for review and follow up.

Intraday Performance Management

Optional feature, available on top of Advanced Scorecards, that allows users to manage, analyze and track performance during the day, using KPIs that are calculated several times during the day, in up to 15-minute intervals. Using Intraday KPIs, users can track their performance and receive alerts when the KPI deviates from the targeted range.

INUM

Internal name for a single recorded communication session between the customer and the contact center. This could include an audio recording, screen recording, or an email. For audio recordings, one INUM begins when the contact center answers the customer’s phone call and ends if the customer is put on hold or transferred. A second INUM begins after the hold or transfer of the same call (when a second recording session begins).

Inverse Document Frequency

Industry-standard weight used widely in information retrieval that is used in relevancy-based searches in Speech Analytics. The IDF weight is a statistical measure used to evaluate how important a term is in the index, which is based on the term's frequency in the index. IDF diminishes the weight of terms that occur very frequently, and increases the weight of terms that occur rarely. IDF is used only in multiple-term entries (such as credit debt payment), as the importance of the search is on the relevancy or power of the term within the index.

K

KPI Gadget

Utility supported by Scorecards that provides users with KPIs on their desktops. For each KPI, the KPI Gadget displays the KPI’s name, score, history graph and period to date data.

L

Language Model

Repository used with Speech Analytics and Real Time Speech Analytics that contains words for a specific language, where each word has its own phonetic representation (one or more words) and frequency grade, for the purpose of accurate word recognition and subsequently transcription.

License Management

System management functionality (available via the Portal) that includes: - Activating the license using the license Web portal - Uploading the license - Customizing the license (includes adding or removing items from the license, as required) License management is enforced centrally, and integrated with the other system information.

Local Time

Time axis in the system that refers to the time on the clock in the location where the operation occurred. Local time is used for cross-enterprise reporting, and Speech Analytics operations. This time stamp is never shifted for users when displayed in business applications, as it is important to know when an operation took place relative to the people who took part in that operation.

Locator

Interaction Application’s DLL component that determines how to search for interactions based on the selected interactions specific characteristics (also called the M, C, ST key).

Log Viewer

System Management module that allows users to view and manage system logs. Using the Log Viewer, you can select the managed server for which you want to view logged information, and activate a specific log file.

M

Maintenance Group and Service Accounts

A system user account defined for domain users who have the relevant permissions to run the required maintenance tasks. For example, for installing patches, the users in this group need to be assigned with the relevant rights to the file system and registry. In addition, these users are used by the company to troubleshoot WFO applications.

Managed Server

A server that is managed by the Enterprise Manager application. The Enterprise Manager application, which resides in the Data Center, interacts with the Enterprise Manager application on the other servers in the system to configure and monitor those servers.

Management Service Account (previously known as IMSA)

A system user account used for the following purposes: - Running application services - Accessing all files created by applications, using file-security access The MSA account has only the minimal SQL rights required for run-time application operations.

Message (Text Analytics)

The part of the interaction that represnts a single comunication, either from the employee or the customer. An interaction typically comprises multiple messages from the empolyee and customer. See also Interaction.

Mobile App

Downloadable software for mobile devices to connect to the Workforce Optimization Suite. It includes a subset of the suite functionality: Scorecards, Calendar, and Request Time Off.

Monitor Employee Dashboard

The Supervisor Dashboard in the Interactions application enables supervisors to monitor and evaluate employee interactions in real time, so that they can deliver on-the-spot feedback and provide assistance and support during problematic calls. Alerts are designed to instantly notify supervisors when the length of an interaction has exceeded a predefined time period.

My Notifications

Suite-wide feature that provides a personal, read-only Inbox for notifications sent to users by other employees (for example, a user's supervisor or manager), or generated by an alert rule.

N

Notification Profile

Contains a list of email addresses or SNMP nodes. A Notification Profile is assigned to an individual alarm during the alarm configuration process. If the alarm is triggered, the email addresses and the SNMP nodes receive a notification that the alarm was triggered.

O

Organization Management

Administrators can set up different hierarchies that allow them to manage users from a single, unified, Web interface.

Organizational Hierarchy

Hierarchy set up by administrators (via the EM) that is structured according to the managerial and employee hierarchy in the company.

P

Platform

A predefined logical group of server roles that are installed together on a physical server.

Playback

The process of selecting a recorded interaction, playing it back to listen to the call and viewing the content of the interaction on the screen.

Player

Application that displays recorded interaction data in audio waveform format, which is a color-coded display of the voice energy levels of the employee and customer. The Player also provides metadata about the interaction.

Plot

Line chart in the Speech Analytics application that allows viewing statistics for Category or Term trends. The Plot allows viewing the trend's development over the selected time frame and easily identifying periods when the trend was consistent, and periods when it was falling or rising. By changing the time frame of the Plot, you can zoom in and out on periods of interest.

Portal

The home page or main UI access point for all WFO applications.

Portlet

Also known as Widget. Visual building block in an application that is interchangeable, depending on system or user configurations. Widgets hold specific information processed by the application, and make certain activities available to the user.

Post-Processing Framework

System-automated call mission queue used in Speech Analytics for retrieving transcribed interactions.

PPFW

System-automated call mission queue used in Speech Analytics for retrieving transcribed interactions.

Privilege

Each role contains a set of privileges, which, associated with user roles, define the features of the application a user is able to view and the functionality in the application the user can access.

Process Discovery and Analysis

Process Discovery and Analysis allows DPA reporting users to visualize and analyze the workflow of events, steps, and processes. Process Discovery is used to investigate how business processes are implemented, while allowing users to identify best practices and process compliance issues.

Project

Instance of the Speech and Text Analytics application that supports a different language or Line of Business (LOB).

Project Rules Manager

Component that allows you to define rules, according to which the system performs specific actions. You can also assign a condition to a rule, which defines when the rule's actions must be performed.

Pulse

Feature in Workforce Management that tracks Queue data. Pulse can show the Actual vs. Forecasted metrics.

Q

QM Database

Server role in the Data Center (also known by its legacy name Central Application) is used to store Quality Monitoring application data, including evaluations, flags, interactions selected for users’ Inbox, etc.

QM DB

Server role in the Data Center (also known by its legacy name Central Application) is used to store Quality Monitoring application data, including evaluations, flags, interactions selected for users' Inbox, etc.

Queue

Representation of the workload in WFM (also known as Work Queues). Each queue has a media type (such as phone, email, fax), and consists of various metrics (such as Contact Volume Offered, Contacts Abandoned, Service Level, Staffing, Average Speed to Answer).

Queue Mapping

Process of mapping data source groups to queues (also known as Work Queue Mapping).

R

Ranking

Rating of a specific interaction in the search results in Speech Analytics, which is determined by the number of instances of the search term within the interaction, and the interaction's individual score.

Rating Category

Predefined categories used in Customer Feedback to rate feedback received for a specific job title in an organization (such as Poor, Fair, Goal, Good and Excellent).

Real Time Alert Notifications

Suite-wide alert mechanism that generates real-time alerts to specified users or targets in the form of desktop messages appearing on the target's workstation and emails. These alerts are triggered by different actions performed in different applications (including Interactions, Speech Analytics and Real Time Speech Analytics).

Real Time Monitoring

Process that enables users to monitor employees' calls and screen activity as the call is taking place. Users select the extension or employee they want to monitor, and can then hear the call and view the employee’s screens continuously on the user interface, which continually displays the employee’s status in realtime (including whether the employee is logged in, in a call, not in a call, or logged out).

Real Time Speech Analytics

Feature that detects keywords (terms and phrases) spoken in contact center interactions in near real time. The keywords are detected according to the system’s language vocabulary. On detection, the system triggers alerts and actions that inform employees of calls that are of significance to the enterprise.

Reason Codes

Representation of an external data source event in WFM, which consists of an Event Mode and Event Reason. For example, the event mode, 5, could be the data source identifier for some kind of unavailability. The event reason, Lunch, further qualifies the data to mean that the employee has entered a state of unavailable because of their Lunch break.

Recorder Analytics Framework

Comprises the Recorder-based set of components shared by all Recorder Platform Analytics solutions, part of Real-Time Speech Analytics as well as Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics). The framework includes: software interfaces, services (including the Analytics Service, a core component of the framework), rules processing, and the infrastructure which supports a common enterprise solution for analyzing all metadata and audio captured by recorders.

Recorder Analytics Rules

Part of the Recorder Platform Analytics product, which includes Real-Time Speech Analytics and Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics). A Recorder Analytics Rule can be configured for a number of purposes, such as automatic enrollment, identity verification, and/or target detection for voice biometrics. Each rule consists of configuration settings that determine: - Real-time call selection based on recording rules - Historical call selection based on campaigns - Analytics engines used - Identification rules used - Conditions for the rule to trigger - Actions to take when the conditions are satisfied For example, you can configure a rule to use the Voice Biometrics Engine to help identify a customer on a call; if the identification fails, the rule's action is to generate an alert to the employee and to tag the call with specific metadata.

Recorder Platform Analytics

Enterprise solution that performs complex, automatic analysis of call audio and metadata in either real-time (as recording occurs) or post-processing (after recording completes). Recorder Platform Analytics includes Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics) and Real-time Speech Analytics (RTSA).

Recording Interactions

Product in the system that provides a recording and archiving infrastructure that records and stores audio and screen data for compliance, customer analytics and workforce optimization.

Recording system

Recording is the process of capturing an agent-customer interaction for playback, screen and dialer-based interactions, and evaluation purposes. The Recording system consists of a set of logical servers called Recorders, which consist of software components that capture an interaction between an agent and a caller. Recording rules are set up in the system to control the behavior of recorders and the recording process. The recorders record media data and store the data in the system, which is tagged with contact-related data (media and metadata). Administrators can then retrieve the interactions of a contact and play them back, either from a PC or over the phone. In addition, administrators can monitor agents’ calls and screen activity while a call is in progress.

Relations

In Speech and Text Analytics, two terms found in close proximity to each other in one interaction. For example, speak <-> supervisor is one relation. This indicates that the words speak and supervisor were found within close proximity to one another in an interaction.

Reporting Services

Server role in the Data Center that provides reporting services for Workforce Management (WFM), Scorecards, eLearning, Coaching, Customer Feedback, Interactions and Speech Analytics products. It is based on the SQL Server Reporting Services Reporting infrastructure.

Risk Management

Component of Recorder Platform Analytics that provides interaction search and replay functionality, combined with integration of Recorder Platform Analytics. You can use Risk Management to see the results of Real-time Speech Analytics as well as Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics) analysis.

RTSA

Feature that detects keywords (terms and phrases) spoken in contact center interactions in near real time. The keywords are detected according to the system's language vocabulary. On detection, the system triggers alerts and actions that inform employees of calls that are of significance to the enterprise.

S

SA

Product in the system that analyzes ongoing changes in customer behavior through spoken interactions with the customer, and drives effective organizational changes needed to address challenging market conditions.

SAT

Test plan that validates the successful installation and configuration of the entire system suite. The SAT is performed by a System Engineer together with the Customer Project Manager.

Scorecards

Product that assists agents, supervisors and all contact center employees to focus on critical aspects of their performance and identify opportunities for improvement.

Script Adherence

Speech Analytics feature that measures adherence or non-adherence to a defined script. A category that is used to retrieve interactions that contain a given script are referred to as Script Adherence Categories. A category for which the Inverse check box is selected can be used to retrieve interactions that do not contain the given script (known as the Script Non-Adherence Category or Inverse Category).

Self Evaluations

Evaluations performed by employees in the Interactions application to evaluate their own performance in handling an interaction.

Semantic Intelligence

Novel technology used in Speech Analytics that automatically extracts themes from employee-customer interactions, which are significantly more intuitive and meaningful than words. Si is based on machine learning-based methods to improve the knowledge extraction process in a specific domain or business environment. By formulizing a specific company's internal knowledge and terminology, the solution surfaces relevant and important content for analysis.

Sentiment (Text Analytics)

The attitude, mood, emotion expressed by the customer within an interaction. Sentiment analysis is available at the level of the interaction for each content type, and ranges from the very positive to the very negative.

Server Discovery

A process performed by the Enterprise Manager application in which the application regularly communicates with each server in the system to determine whether any new software (new release, service pack, hot fix, or patch) or server roles have been added or installed on the server.

Server Role

Contains a logical, predefined set of components (system software or certified third-party software) deployed in the Data Center and Site Zones that provide specific functionality for the system.

Server Role Association

A relationship between server roles, where one server role relies on the configuration and functionality of another server role to perform its tasks. Some server role associations are configured automatically by the system and others are configured manually by administrators. Some server roles do not support any associations.

Server Role Constraint

A particular condition or restriction under which a server role must operate. For example, some server roles have restrictions on the number of server role instances that can exist within a particular site.

Shared Inbox

Feature in Interactions where a message Inbox is shared between several users, where each user can retrieve the next interaction from the shared inbox for evaluation purposes. Shared inbox is useful when a team of evaluators is assigned to evaluate a team of agents on a 'first in first out' basis.

Shift Bidding

Feature in WFM that allows employees to submit requests (bids) for selected shift assignments. An automated rules engine factors in seniority, rank and bonus points to assign shifts. Managers or supervisors can allocate bonus points to staff for recognition of hard work, and employees can use the bonus points to elevate their position in the bid. Employees can check the status of their shift bids online, and the system immediately notifies employees of the chances of getting their desired shifts.

Shift Swapping

Feature in WFM that allows employees to change shifts with another employee. Employees can use their Web browser to securely post, negotiate, and request shift swaps via an online swap board, which is monitored by an automatic conflict checker and forwarded to managers for quick and easy processing.

Si

Novel technology used in Speech Analytics that automatically extracts themes from employee-customer interactions, which are significantly more intuitive and meaningful than words. Si is based on machine learning-based methods to improve the knowledge extraction process in a specific domain or business environment. By formulizing a specific company's internal knowledge and terminology, the solution surfaces relevant and important content for analysis.

Site

Logical deployment zone that provides recording, content storage and integration with the customer environment.

Site Acceptance Test

Test plan that validates the successful installation and configuration of the entire system suite. The SAT is performed by a System Engineer together with the Customer Project Manager.

Skill

Defined activity in WFM that an employee is able to do. For example, an employee may be able to process loan applications, but not mortgage applications. When a schedule is created, each queue in the campaign is mapped a skill. In turn, each employee is assigned a set of skills, and this tells the scheduling engine which employees can process the different workloads.

SMA

An alarm proxy component that sits on many system servers, pulls status messages from components, generates the alarms and forwards them to the Alarmer, the main alarm component on servers.

Speaker Separation

Method used in Speech Analytics of segmenting and labeling speaker information in the audio of a recorded interaction.

Special Days

Feature in WFM that allows administrators to assign time intervals in employee schedules with a special setting to indicate paid time off (such as holidays). This setting ensures that employees receive the appropriate pay for these scheduled breaks.

Speech Analytics

Product in the system that analyzes ongoing changes in customer behavior through spoken interactions with the customer, and drives effective organizational changes needed to address challenging market conditions.

Speech Analytics Database

Database in the Data Center used in the Speech Analytics 2.0 solution that stores the ontology output from the Ontology Training process.

Speech Application Service

Server role in the Data Center that builds the index of transcribed calls for use by various system applications and services, and processes requests for retrieving analytics data based on the indexed interactions.

Speech Products Database

Database in the Data Center that stores transcribed interactions. The Transcription Repository Service (TRS) inserts and retrieves interactions to and from the Speech Products Database for transcription, indexing and Speech Analytics 2.0 services (Ontology Training and Ontology Tagging).

Speech Transcription Service

Server role in the Site zone that retrieves and transcribes the audio files of recorded interactions and outputs two different types of data—the transcribed text of the recorded conversation, and metadata about the recording.

SQL Collation

The character set, or collation, to be used and interpreted by the installed SQL Server. For a list of supported collations, see the Site Preparation Checklist (SPC).

Star Ranking

Mechanism in Speech Analytics by which an interaction is given an overall score for a category, according to the terms that the interaction contains. The Star Ranking menu shows users what percentage of the result set is most relevant for the category, and enables users to drill down and filter the displayed result set according to a selected rank.

Survey Assignment

Customer Feedback administration feature that involves assigning one or more surveys from the organization to each transaction (such as bill payments, billing inquiries, sales, etc.). This allows one or more surveys to correspond to each customer interaction.

System Account

A predefined account used for accessing the system for the first time, and creating the First User in the system. The System Account is also used for specific intenal system activities and is not used for application activities.

System Management

Suite-wide system management activities are performed from a single, Web-based application, Enterprise Manager. Activities are saved and processed centrally in one secure and highly available database.

System Monitoring Agent

An alarm proxy component that sits on many system servers, pulls status messages from components, generates the alarms and forwards them to the Alarmer, the main alarm component on servers.

System Time

Time axis in the system (also known as User Time), where users can view time stamps automatically adjusted according to their own time zone and daylight saving time shifts, regardless of where the operation took place. This is especially useful for search and playback operations. The time of the operation is stored in the system as system time (usually set to UTC), and displayed to the user when the user views the operations' details according to the user's time zone.

T

Tags

Time-stamped information items appended to interactions at different points of interest. The following types of tags exist: - Annotations: Textual comments that are manually appended to interactions - Events: Actions that take place during an interaction that are automatically appended to interactions during record

Talk Time

There are different meanings of this term, depending on the product: - Talk time in Interactions: Refers to an agent's average handling time of interactions during different selected time periods (daily, weekly, monthly, etc.). - Talk time in Speech Analytics: Refers to the duration or percentage of time when either the agent or the customer was speaking during an interaction.

Target

Person of interest to an enterprise and used by Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics). Risk Management can help identify a potential target on a call through the use of voice biometric technology. An example of a target is someone who is suspected of fraudulent activity. Such a person would be added to a watch list. With the addition of the person's voiceprint, the Risk Management system can help detect if the vocal pattern occurs on a call.

TDM Recording

In Time-Division Multiplexing (TDM), multiple data streams are assigned different time slots over a shared channel. In TDM Recording environments, trunk-side recording taps directly into a T1 or E1 line to record all incoming calls at the demarcation point before going to a switch.

Term

One to five words that are meaningful to a specific type of business, or phrases that stand out in interactions in Speech and Text Analytics. For example, a theme can contain the following terms and phrases: - verify - confirm - want to confirm - wanted to confirm

Term Frequency

Percentage of interactions in Speech Analytics in which the term is used, out of the total number of interactions on a given date.

Term Trend

Type of trend in Speech Analytics that shows the fluctuations of spoken words and phrases mentioned in customer-employee interactions. For example, an increase in instances of the phrase “new fees” can quickly indicate that calls are actually increasing contact center costs, eroding the potential revenue gains and posing a risk to current customer retention.

Themes

Groups of expressions that have a similar meaning in Speech and Text Analytics. Themes help users understand what is happening in their calls, without the need to know what to look for in advance. A theme represents a single business issue represented by many different interactions. By reviewing themes, users can quickly and easily understand the main business issues raised in a multitude of interactions in the data set.

Time-Off Pool

Allocation in WFM used to allocate the time off available to a group (pool) of employees. For example, if an administrator specifies that 32 hours of time off are allocated to a pool for a specific day, employees in that pool can be granted requests for time off on that day for up to a total of 32 hours (for all employees together).

Time Collector Mappings

Entity in WFM that maps the reason code of a data source with an organization's activities.

Training

Semantic Intelligence (Si) process in Speech Analytics in which the system implements machine learning-based methods to extract and surface ontology-related items found in a sampling of transcribed interactions. These items can help the user make non-trivial observations about their business. At the end of the Ontology Training process, a base ontology is built that is used for user review and analytics purposes.

Transcription

The process in Speech Analytics of converting audio files of the recorded agent-customer conversation to text. The transcription process outputs two different types of data: - Transcribed text of the recorded conversation - Speaker Separation (SPS) data from the recording

Transcription Repository Service

Web-based service that provides an interface between the Speech Products Database and other services in the system. The TRS inserts and retrieves transcribed interactions between the database and other system services and applications.

Transcription Rule

Definition configured in Speech Analytics that includes language and specific vocabulary, which forms the basis of the cluster definition used by the

Speech Transcription Service. Each transcription rule is applied to a specific instance, which is associated with a specific Speech Application Server.

Trend

Feature in Speech and Text Analytics that helps users: - Identify changes in customers communication with the contact center - Understand any emerging tendencies - Pinpoint any significant events that may require close attention All trends are visually presented in a dedicated Plot. Alongside a graphical presentation of each trend, Speech and Text Analytics also provide trend analysis data. You can view this data in time frames of different durations to understandi recent trends and trends over a longer period of time.

TRS

Web-based service that provides an interface between the Speech Products Database and other services in the system. The TRS inserts and retrieves transcribed interactions between the database and other system services and applications.

U

Uncategorized Category

Category in Speech Analytics that includes all interactions that do not meet any of the existing category definitions (excluding the Emotions category). The Uncategorized category enables analyzing the commonalities of the interactions not currently assigned to any category, to determine whether additional categories need to be created.

User Management

Administrators set up and create user profiles for every employee in their organization using the unified, single user management solution for the suite.

User Role

Every user’s profile contains one or more roles, which are assigned to users to define their access permissions to applications. For example, a user with the Supervisor role will have a different level of access to an application than a user with only the Agent role.

User Time

Time axis in the system (also known as System Time), where users can view time stamps automatically adjusted according to their own time zone and daylight saving time shifts, regardless of where the operation took place. This is especially useful for search and playback operations. The time of the operation is stored in the system as system time (usually set to UTC), and displayed to the user when the user views the operations’ details according to the user’s time zone.

V

Verification

Function of Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics). After comparing call attribute values to those in an employee or customer database, voice biometrics compares the speaker’s voice to a collection of employee or customer voiceprints that should match the call. If a match occurs, the speaker is said to be verified. For example, verification passes due to the speaker’s voice matching the voiceprint. The system triggers actions (such as alerts) to tell the employee to skip additional authentication processes. See also: Detection

Virtual Interaction

An interaction between an employee and a customer that is not recorded by the Interactions application, for example, email or fax correspondences or calls recorded on other systems. A virtual interaction can also be created in the system during real-time evaluations, if the user submits the form before the interaction is recorded in the system. In this case, a virtual interaction is created and attached to the submitted form.

Voice Biomerics Engine

One of several engines supported by the Recorder Analytics Framework for Identity Authentication and Fraud Detection (IAFD). The Voice Biometrics Engine provides analysis of metadata and audio supplied by the Analytics Service.

Voice Biometrics Library

A component of Identity Authentication and Fraud Detection (IAFD). Analytics engines invoke the library to perform voice biometric functions, such as analysis of voiceprints against calls for detection and verification. See also: Detection, Verification

Voice Enrollment Engine

One of several engines supported by the Recorder Analytics Framework for Identity Authentication and Fraud Detection (IAFD). The Voice Enrollment Engine facilitates the processing of call attribute metadata and audio, which are supplied by the Analytics Service and are used by the engine to create voiceprints.

Voiceprint

A file containing a mathematical summary of the vocal patterns of a person's voice. A voiceprint is used, in combination with other means of caller identification, by Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics) to assist with identity verification and detection. To be effective, a voiceprint must be trained. Voiceprint training is the process of using audio of a person's voice to create (train) or update (enhance) the person's voiceprint. Audio used for training is based on already recorded interactions, audio clips directly uploaded, or a combination of both.

W

Watch list

A watch list contains one of more voiceprints of people who are of particular interest to an enterprise. A typical example of a watch list might be a collection of voiceprints for individuals (targets) suspected of impersonating others on telephone calls. Watch lists are used by Recorder Analytics Rules for target detection in Identity Authentication and Fraud Detection (IAFD, also known as voice biometrics).

WFM

Workforce Management product in the system that helps measure and leverage the individual talents and preferences of each employee, uniquely ensures that their skills and each one's proficiency are aligned with business objectives and customer needs, and helps produce optimum schedules.

WFO

Defines the system (fifth generation Workforce Optimization solution), which provides a full, end-to-end enterprise solution, including: - Unified, enterprise-wide installation procedures - Centralized system management layer, including configuration, system monitoring and alarms, and organizational and user management - Variety of applications and cross-application integrations

Widget

Visual building block in an application that is interchangeable, depending on system or user configurations. Widgets hold specific information processed by the application, and make certain activities available to the user.

WIT

Data that can be imported from WFM Operations data sources, and typically contains a number of standard attributes, including but not limited to: - Employee - Data Source Group - External ID - Creation Date - Closed Date - Status

Work Item Tracking

Data that can be imported from WFM Operations data sources, and typically contains a number of standard attributes, including but not limited to: - Employee - Data Source Group - External ID - Creation Date - Closed Date - Status

Workforce Management

Product that helps measure and leverage the individual talents and preferences of each employee, uniquely ensures that their skills and each one’s proficiency are aligned with business objectives and customer needs, and helps produce optimum schedules.

Workforce Optimization

Defines the system (fifth generation WFO solution), which provides a full, end-to-end enterprise solution, including: - Unified, enterprise-wide installation procedures - Centralized system management layer, including configuration, system monitoring and alarms, and organizational and user management - Variety of applications and cross-application integrations

Workspace

There are two different meanings of this term: - An area within an application window where the user interacts with the program. For example, in Speech Analytics, the high-level workspaces are Discover, Analyze, Report and Design. - Phone or screen group for a user in the system.