inContact Workforce Management v2

Agent Workstation Administrator Web Site User Manual

www.incontact.com

inContact WFM v2 Agent Workstation Administrator Web Site User Manual

- **Version** — 16.1
- **Revision** — March 2016
- **About inContact** — inContact (NASDAQ: SAAS) is leader in cloud contact center software, helping organizations around the globe create customer and contact center employee experiences that are more personalized, more empowering and more engaging today, tomorrow and in the future. inContact focuses on continuous innovation and is the only provider to offer core contact center infrastructure, workforce optimization plus an enterprise-class telecommunications network for the most complete customer journey management. inContact offers customers a choice of deployment options. To learn more, visit www.inContact.com.

  Excel and Internet Explorer are registered trademarks of Microsoft Corporation.
- **Copyright** — ©2016 inContact, Inc.
- **Disclaimer** — inContact reserves the right to update or append this document, as needed.
- **Contact** — Send suggestions or corrections regarding this guide to documentationsrequest-discover@incontact.com.

Table of Contents

1. Overview 8
   1.1. Browser Requirements 8
2. Home Page Features 8
   2.1. Login 8
   2.2. Announcements 9
   2.3. Links 10
   2.4. Contacts 10
   2.5. Change Password 10
   2.6. Log out 11
3. Schedule Bidding 11
   3.1. Manage Schedule Bid Periods 12
   3.2. View Schedule Bid Period 12
   3.2.1. Schedule Preferences 12
      3.2.1.1. Creating a Favorite 13
      3.2.1.2. Creating a Least Favorite 14
4. Buddy Groups 14
   4.1. Create a Buddy Group 14
      4.1.1. Invite Agents to Your Buddy Group 14
      4.1.2. Deleting a Buddy Group 15
      4.1.3. Accepting an Invitation 15
   4.2. Buddy Group Preferences 15
5. Vacation Bidding 16
   5.1. Vacation Bid Periods 16
   5.2. View Vacation Bid Period 16
   5.3. Enter Vacation Bid Choices 17
6. Agents 18
      6.1. Manage Agents 18
      6.2. Add New Agent 18
      6.3. Edit Agent 19
      6.4. Edit Agent Summary 19
      6.5. Agent Assignments 20
      6.6. Agent Skill Assignments 21
      6.7. Agent Preferences 21
      6.8. Delete Agent 21
7. Analytics 22

7.2. Dashboards 22
7.2.1. Configuration 22
7.2.2. Dashboard 22
7.3. Scorecards 23
7.3.1. Performance 23
7.3.2. Adherence 24
7.3.3. Configure Scorecard 24
7.4. Reports 25
7.5. Agent Exceptions 25
7.5.1. Agent Exceptions Query 26
8. Adherence 26
8.1. Agent Adherence 26
8.1.1. Agent Adherence Page 26
8.1.2. Shift History 27
8.1.3. Warning Message 27
8.1.4. Configure Status 28
8.1.5. Refresh Rate 28
8.1.6. Download Data 28
8.2. Real-Time Adherence 29
8.2.1. Opening New Profile Window 29
8.2.1.1. Opening Add Window 29
8.2.1.2. Creating New Window 30
8.2.1.3. Saving New Profile 30
8.2.1.4 Editing Alert Configurations 31
8.2.1.5. Setting Alert Configurations 31
8.2.1.7. View Real-Time Adherence Windows 32
8.2.1.8 Download Window 32
8.3. Adherence Scorecard 33
9. Administration 33
9.1. Configuration 33
9.1.1. Metric Configuration 33
9.1.2. Report Configuration 34
9.1.2.1. Add New Report Template 35
9.1.2.2. Delete Report Template 35
9.1.2.3. Report Templates 35
9.1.2.3.1. Settings 35
9.1.2.3.2. Parameters 35
9.1.2.3.3. Scope Summary 36
9.1.2.3.4. Report Summary 36

9.1.3. Dashboard Configuration 36
9.1.3.1. Add New Dashboard Template 36
9.1.3.2. Delete Dashboard Template 36
9.1.3.3. Dashboard Templates 36
9.1.4. Messaging Configuration 37
9.2. Audit Reports 37
9.2.1. Download User Log 38
10. Operations 38
10.1. Update Forecasts 38
10.1.1. Operational Forecasts 38
10.1.2. Edit Forecasts 39
10.2. Performance 39
10.3. Performance Reports 42
10.3.1. Performance tab 42
10.3.2. Staffing tab 42
10.3. Agent Skill Management 43
10.3.1. Manage Agent Skills Management Runs 43
10.3.1.1. Agent Skill Change Runs 44
10.3.1.1.1. Status 44
10.3.1.1.2. Action 44
10.3.1.1.3. Delete Agent Skills Change Run 45
10.3.1.2. Synchronize 45
10.3.2. Download 45
10.3.3. Reports 45
10.3.3.1. Agents Meeting Criteria 45
10.3.3.2. ACD Skill List 45
10.3.3.3. Agent Skills 45
10.3.3.4. Agent Skill Counts 45
10.3.4. Add New Run 45
10.3.4.1. Configuration panel 45
10.3.4.1.1. Environment 45
10.3.4.1.2. Eff. Start Date 46
10.3.4.1.2. Eff. End Date 46
10.3.4.1.3. Agent Availability 46
10.3.4.1.4. No Breaks 46
10.3.4.1.5. No Exceptions 46
10.3.4.1.6. Refresh 46
10.3.4.1.7. Show All Skills 46
10.3.4.2. Search Criteria tab 46
10.3.4.2.1. Business Unit 46
10.3.4.2.2. Org Unit 46
10.3.4.2.3. Tour Group 47

10.3.4.2.4. Shift Start 47
10.3.4.2.5. Skill Group 47
10.3.4.26. Call Handling 47
10.3.4.2.7. Selection Criteria 47
10.3.4.3. Upload Lists tab 47
10.3.4.3.1. Select File 48
10.3.4.3.2. Download Template 48
10.3.4.3.3. Automatically Add New Agents 48
10.3.4.3.4. Upload 48
10.3.4.4. Submit Request tab 48
10.3.4.4.1. Description 48
10.3.4.4.2. Agents 48
10.3.4.4.3. Action 48
10.3.6.4.4. Type 48
10.3.4.4.5. From 49
10.3.4.4.6. To 49
10.3.4.4.7. Recurring 49
10.3.4.4.8. Submit Request 49
10.3.5. View Run 49
10.3.5.1. Synchronization Runs 50
10.3.5.1.1. Exceptions 50
10.3.5.1.2. Database Update 50
10.3.5.1.3. Update 50
10.3.5.1.4. Download 50
10.3.5.1.5. Exceptions List 50
10.3.5.2. Non-Synchronization Runs 50
10.3.5.2.1. Filter 50
10.3.5.2.4. Database Update 51
10.3.5.2.5. Update 51
10.3.5.2.6. Download 51
10.3.5.2.7. Exceptions List 51
10.3.5.2.8. Agents List 51
11. Calendar 51
11.1. My Calendar 51
11.1.1. Weekly Summary 52
11.1.2. Calendar View 53
11.1.3. View Schedule 53
11.1.4. Email 54
11.1.5. Enter Exceptions 54
View Exceptions 55
11.1.7. Swap Shifts 55
11.2. Swap Shifts 56
11.2.1. Swap Requests 56
11.2.2. Swap Proposed to Me 56
11.2.3. My Swap Requests 57
11.2.4. My Swap Proposals 57

11.2.5. Available Shifts 57
11.3. Manage Agent Schedules 58
11.3.1. Manage Agent Schedules Page 58
11.3.2. Edit Schedules 59
11.3.3. Delete Schedules 59
11.3.4. Add Schedules 59
11.3.5. Send Message 60
11.3.6. Download Schedules 60
11.3.7. Copy Schedules 60
11.3.8. Exception Requests 61
11.3.9. Add New Exception 62
11.3.10. Add Work Time 62
11.3.11. Daily Schedule View 63

1. Overview

The WFM v2 Agent Workstation Website, which will be referred to simply as the Website, is the user interface providing access to all of its functionality. It allows users to manage performance, work and off times during the course of an operating day.

The purpose of this User Manual is to provide a comprehensive description of the WFM v2 Agent Workstation Website. The AWO Agent Workstation empowers agents and management to manage schedules, exceptions, overtime, volunteer time off (VTO), and other activities. There are two classes of users who are accommodated in the Website. They are as follows:

- Managers/Administrators: These users are responsible for administering the Website, including configuring settings common to all Environments, and managing and creating users. These users are also able to manage performance, real-time adherence (RTA), schedule meeting, training or other off-phone activities, approve or reject exception requests, and manage agent schedules. Managerial or admin user roles with different functional and organizational scope can be created by clicking the *Roles* link under the Administrator tab in the AWO Portal.
- Agents: These users can access their Home page to view announcements and messages posted by their admins, change password, view their schedules, enter exception requests, volunteer for overtime or time off (VTO), swap shifts with other agents, participate in shift and vacation bids, and view their performance.

This document is organized by Website feature. The privileges of each user class are defined within the outline for each feature.

1.1. Browser Requirements

This web application is targeted for Microsoft Internet Explorer 6.0 or higher. In addition, cookies must be enabled for the application's authentication to function properly.

2. Home Page Features

The *Home* page, which is displayed by default upon first access to the Website, is shown in Figure 2.1. Once a user first accesses the Website, the *Home* page the *Home* page contains the Login module, and other public modules.

Figure 2.1 Howe Page with Login Module

2.1. Login

A user can gain access to the secure portions of the Website by logging in using the *Account Login* module located on the left side of the *Home* page. Checking the *Remember Login* check box will cause the user name to be populated automatically the next time the user accesses the Account Login module from the same workstation. To access the secure content in the Website, a user must enter his or her user name

into the *Username* box, and password into the *Password* box, and press the *Login* button. A message will be displayed in the Account Login module if the user is unable to login. Login may fail for the following reasons:

- The user name or the password is incorrect. Please verify both the user name and the password. For security reasons, the system will not inform a user whether the user name or password is invalid, just that login has failed. If a user has forgotten his or her password, an Administrator can reset the password to a new value.
- An Administrator has temporarily closed the site. In this case, the message will provide the cause of the failure to login.
- A system error is preventing logging in. If multiple attempts have been made to login, including having an Administrator reset the user's password, or several users are not able to login, there may be a system error. This is an unlikely event, and would most likely be related to an incorrect installation or configuration, or a physical problem with one or more of the servers (for instance, a power failure). Contact an Administrator or other support person if this happens.

The features available to a user after logging in to the Website depend on the class or access level of the user. These include the items that appear in the drop-down menu bar. Additional sections below describe the features available through these menu items.

Once a user has successfully been authenticated and logged into the Website, the *Home* Page will reappear, with additional modules enabled as shown in Figure 2.2.

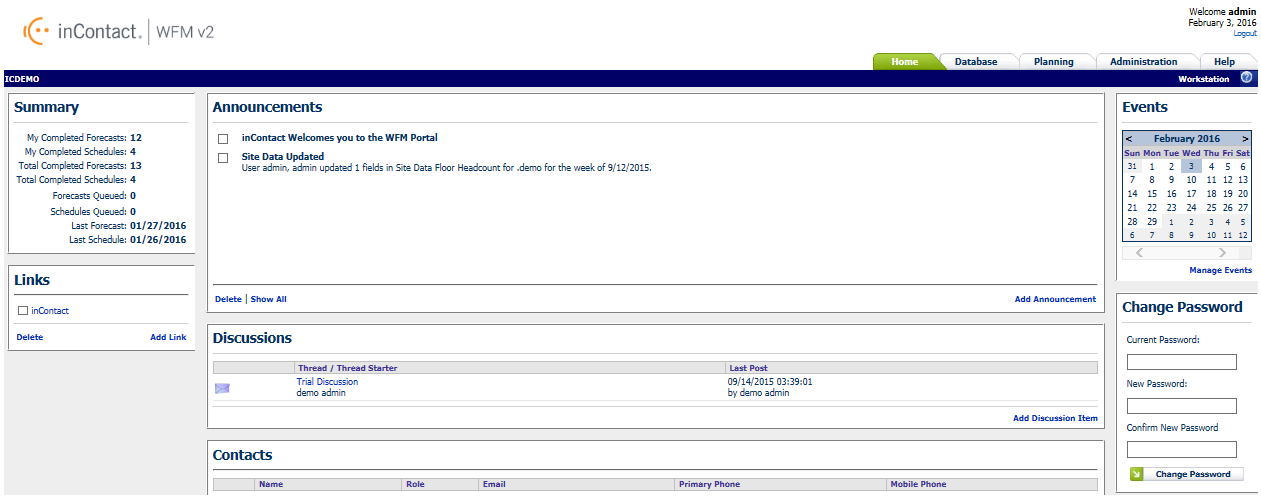


Figure 2.2 – Home Page for Authenticated Users

2.2. Announcements

The *Announcements* module on the Homepage provides important information delivered by the system Administrators as shown in Figure 2.3. The most recent announcements will appear at the top of the block.

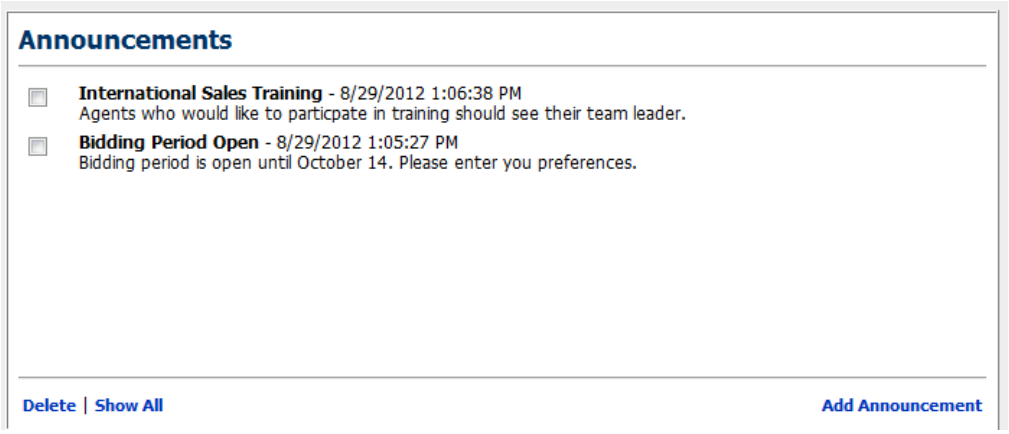


Figure 2.3 – Announcements

2.3. Links

The *Links* block provides useful hyperlinks that the system Administrator has created as shown in Figure 2.4. Clicking on these links will open the website in a new window. If there is a website to be listed here, speak with your Administrator.

Figure 2.4 - Links

2.4. Contacts

The *Contacts for Information* module allows the user to add contact information that is shared by all users of the site. This is simply a convenient common place that users can collect names with email addresses and telephone numbers. To add a new contact, click on the *Add Contact* link and enter the appropriate information as shown in figure 2.5.

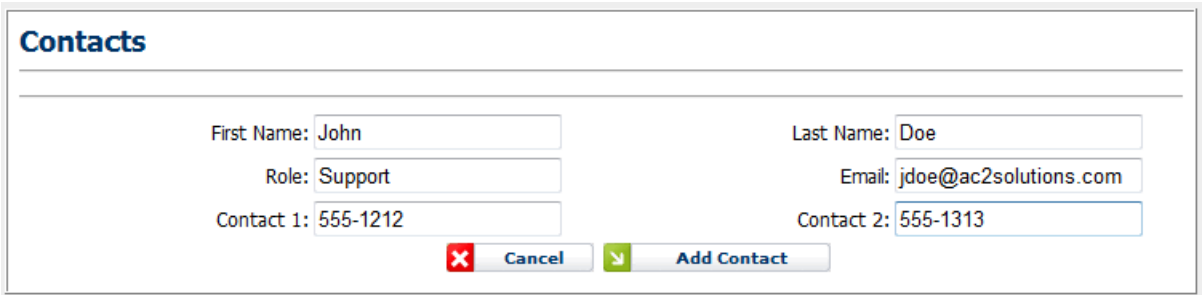


Figure 2.5 - Contacts

2.5. Change Password

The *Change Password* module enables the user to change his or her password. To select a new password, first, enter the existing password in the *Current Password* field. Next, enter the new password in the *New Password* field, and again in the *Confirm New Password* field. A message will appear in the *Change*

Password module to either confirm that the password has been changed successfully, or to notify the user of the reason for the password not being changed. The password change may be unsuccessful if the current password does not match the password in the database, the new password is blank, or the new password and the confirm password do not match.

.

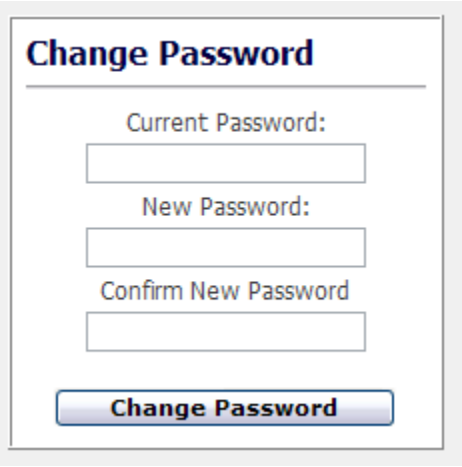


Figure 2.6 – Change Password

2.6. Log out

The *Log out* link appears not only on the *Home* page, but also on all pages, regardless of the access level of the user as shown in Figure 2.7. A user's authenticated session begins when he or she logs in to the site. This authenticated session ends when the user selects the *Log out* link. Closing the browser without logging off also ends the session, but is not the preferred method. Session authentication control in the Website is supported by encrypted HTTP cookies. These cookies are configured to expire when the browser is closed. When a user selects the *Log out* link, however, these cookies are programmatically deleted, which is the most reliable way to ensure that they do not last beyond the user's session.

Figure 2.7 – Log out

3. Schedule Bidding

The *Schedule Bidding* module is used to bid on future schedules by agents when the Administrator has opened a Schedule Bid Period. This module is accessed by clicking on the *Schedule Bidding* link on the *Bidding* drop-down menu as shown in Figure 3.1.

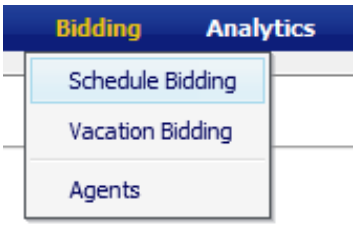


Figure 3.1

3.1. Manage Schedule Bid Periods

The *Manage Schedule Bid Periods* page displays Past Bid Periods and Current Bid Period information as shown in Figure 3.2. The Administrator may set up any number of Schedule Bid Periods allowing different bidding groups to bid at different times. A schedule bid period will span a specific period of time as defined by *Bid Start Date* and *Bid End Date*. To bid on schedules during this period, the user should click on the *View* icon in the corresponding row.

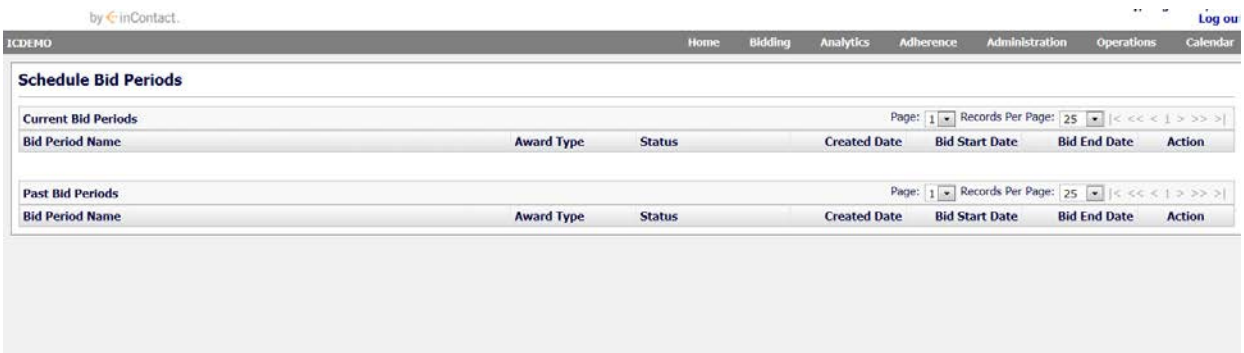


Figure 3.2 – Schedule Bid Periods

3.2. View Schedule Bid Period

Clicking the *View* icon displays the View Schedule Bid Period as shown in Figure 3.3.

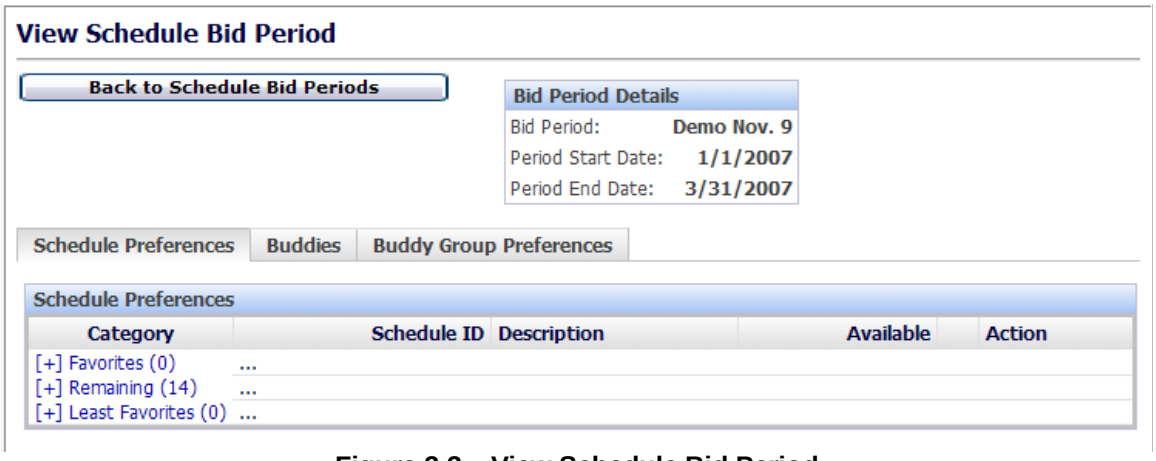


Figure 3.3 – View Schedule Bid Period

3.2.1. Schedule Preferences

This tab displays three categories: Favorites, Remaining and Least Favorites. These categories are used for prioritizing schedule choices. When the page is first reached all schedules available for bidding are shown in the Remaining list as shown in Figure 3.4.

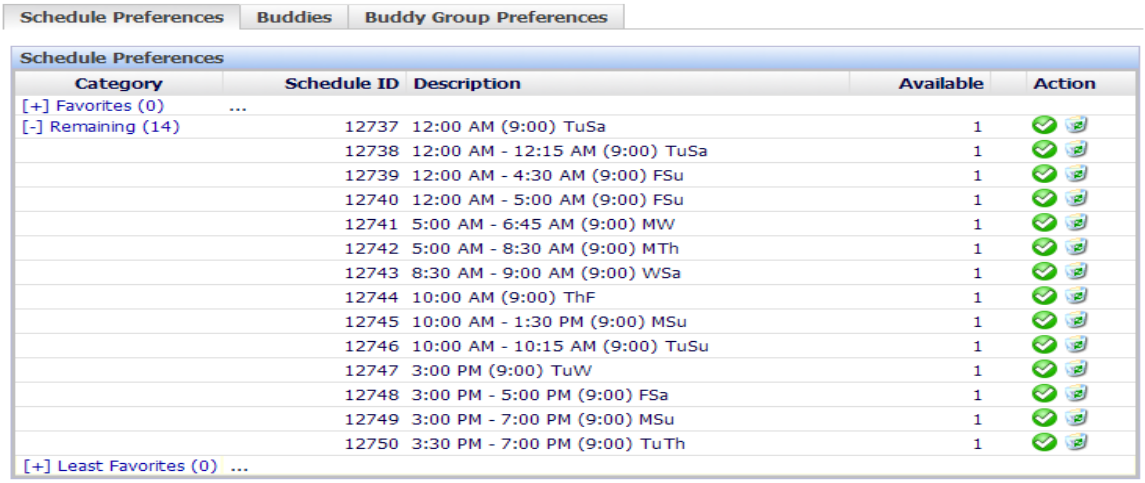


Figure 3.4 – Schedule Preferences

3.2.1.1. Creating a Favorite

To move schedule choices into the *Favorites* category click the Green Check Mark icon. Once a schedule is in the *Favorites* category, the user can change the priority by using the Up and Down arrows or remove a schedule choice by clicking on the *Remove* icon as shown in Figure 3.5. Once schedules are entered into the Favorites category and ordered, the agent does not need to take any further step to save the Favorites category. The last Favorites order existed in the *View Schedule Bid Period* page before a Schedule Bid period closes is the order considered for that agent.

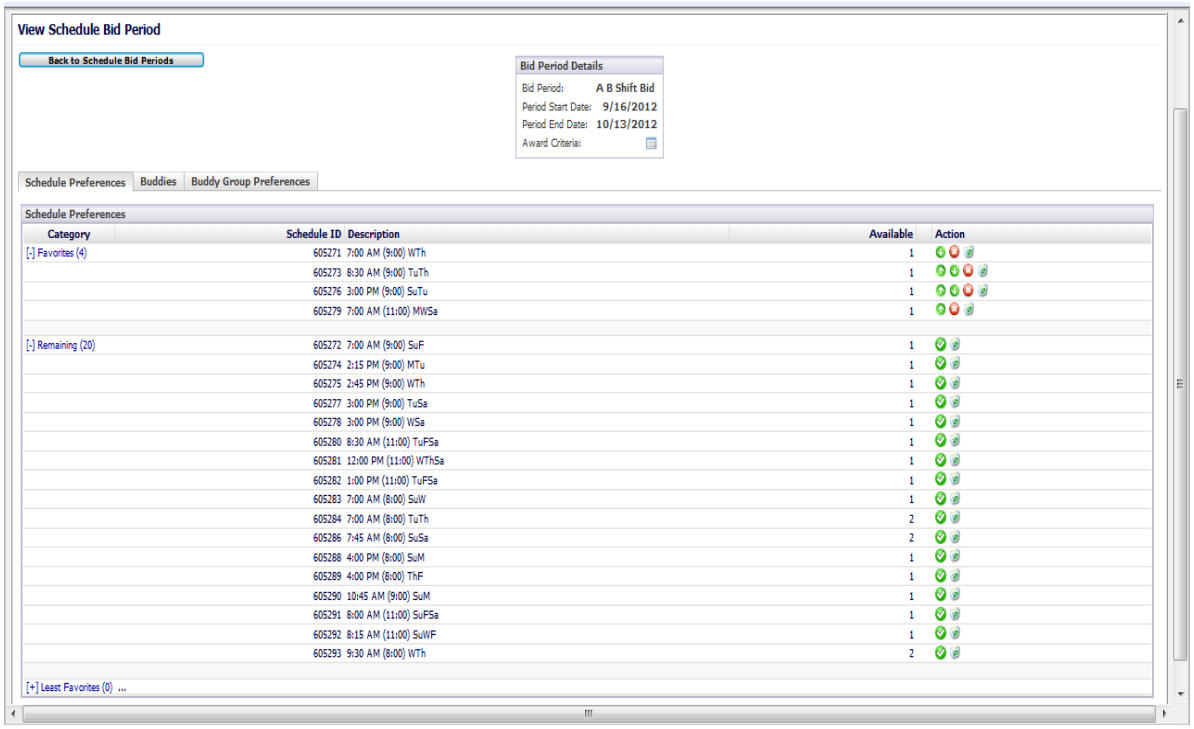


Figure 3.5 – Favorites

3.2.1.2. Creating a Least Favorite

To move a schedule choice to the *Least Favorite* category, click the *Trash* icon. The selection will be moved to Least Favorites as shown in Figure 3.6. Once schedules are entered into the Favorites category and ordered, the agent does not need to take any further step to save the Least Favorites category. The last Least Favorites order existed in the *View Schedule Bid Period* page before a Schedule Bid period closes is the order considered for that agent.

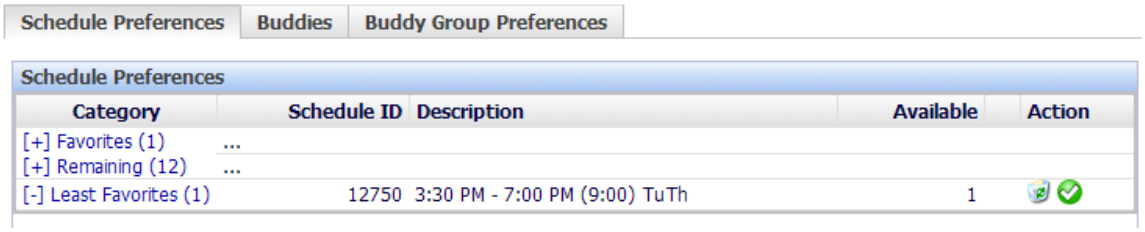


Figure 3.6 – Least Favorites

4. Buddy Groups

Buddy Groups give the opportunity for multiple agents to bid on like schedules together. There must be a minimum of like schedules in each group member's selections to match the number of agents in the buddy bid group before they will be awarded. The buddy group is assigned the lowest ranking score of the agents in the group. If no schedules can be awarded to the buddy group as a whole due to their preferences or low group score, the group is voided, agents in the group are evaluated as individuals and awards are re-processed from the beginning.

4.1. Create a Buddy Group

Click on the *Buddies* tab on the *View Schedules Bid Period* page. Click on the Create a *Buddy Group* link as shown in Figure 4.1.

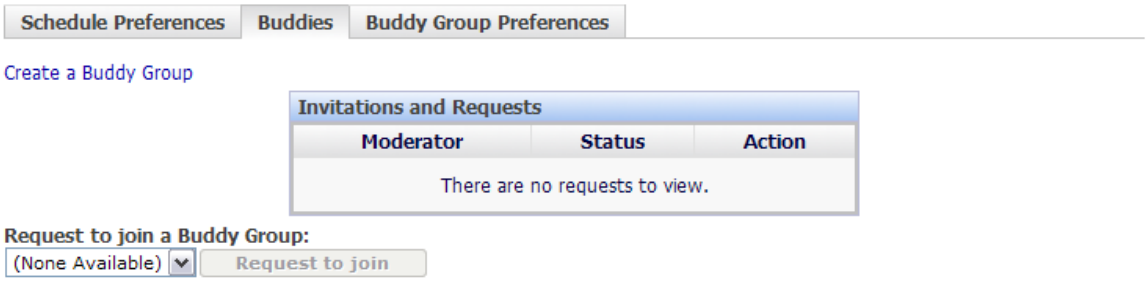


Figure 4.1 – Create a Buddy Group

4.1.1. Invite Agents to Your Buddy Group

Click on the *Invite* button and select the agents the user wants to invite as shown in Figure 4.2.

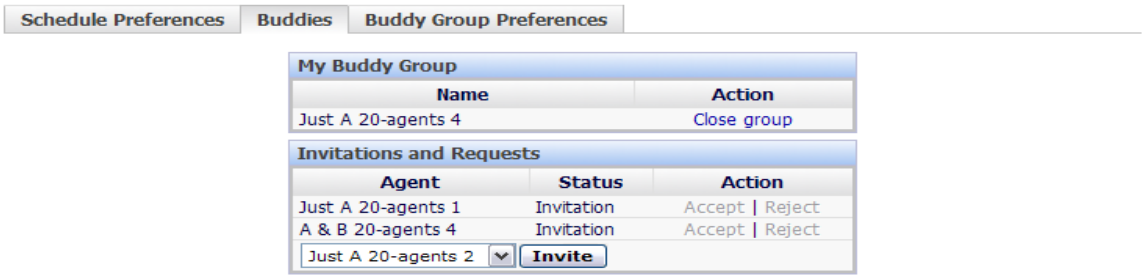


Figure 4.2 – Buddy Invite

4.1.2. Deleting a Buddy Group

To close/delete the buddy group under the Action column click on the *Close group* link as shown in Figure 4.3.

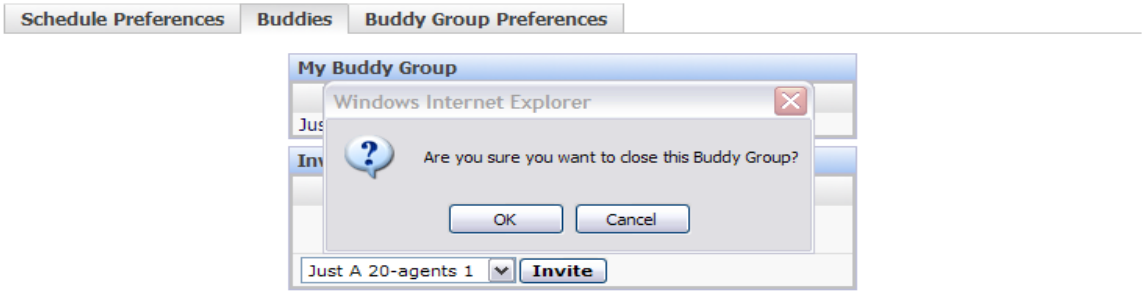


Figure 4.3 – Closing a Buddy Group

4.1.3. Accepting an Invitation

When an agent has been invited to join a buddy group they must "Accept" or "Reject" the invitation. In order to Accept or Reject an invitation, the agent must login to the Website, click on the Bidding – *Schedule Bidding – View* icon and the *Buddies* tab as shown in Figure 4.4.

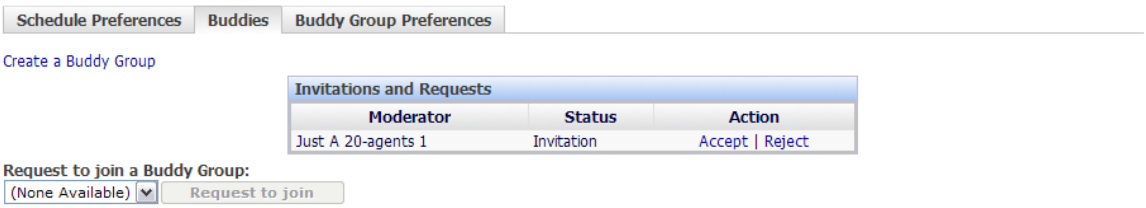


Figure 4.4 – Accepting an Invitation

4.2. Buddy Group Preferences

Once the Buddy Group has been created and members accepted then the Controller can enter schedule choices for the group by selecting the *Buddy Group Preferences* tab as shown in Figure 4.5. There must be a minimum of like schedules in each group member's selections to match the number of agents in the buddy bid group before they will be awarded. This is done the same way as it is for an individual agent (see section 3.2.1.) If no members have been accepted a message will be displayed as shown in Figure 4.6.

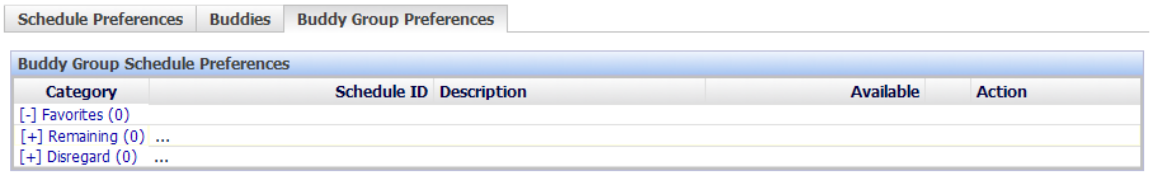


Figure 4.5 Buddy Group Schedule Preferences

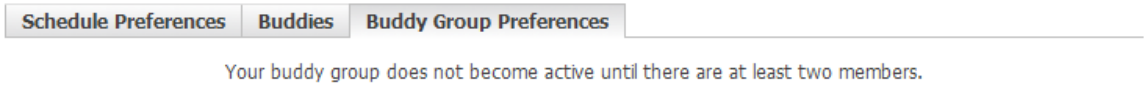


Figure 4.6 – No Members

5. Vacation Bidding

The *Vacation Bidding* module is used to bid on vacations in the future when the Administrator has opened a Vacation Bid Period. This module is accessed by clicking on the *Vacation Bidding* link on the *Bidding* drop-down menu as shown in Figure 5.1.

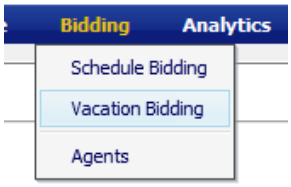


Figure 5.1

5.1. Vacation Bid Periods

The *Manage Vacation Bid Periods page* displays Past Bid Periods and Current Bid Period information as shown in Figure 5.2. The Administrator may set up any number of vacation Bid Periods allowing different bidding groups to bid at different times. A vacation bid period will span a specific period of time as defined by *Bid Start Date* and *Bid End Date*. To bid on vacation during this period, the user should click on the *View* icon in the corresponding row.

Figure 5.2 – Vacation Bid Periods

5.2. View Vacation Bid Period

Once the user has clicked the *View* icon from the *Vacation Bid Periods* page, the *View Vacation Bid Period* page will open as shown in Figure 5.3. This page is used to enter bid choices for the vacation period. The page is comprised of three major areas: Bid Period Details, Navigation Calendar and Bid Management. Vacation allotments displayed are the number of vacation slots available for agents to be on vacation in a week.

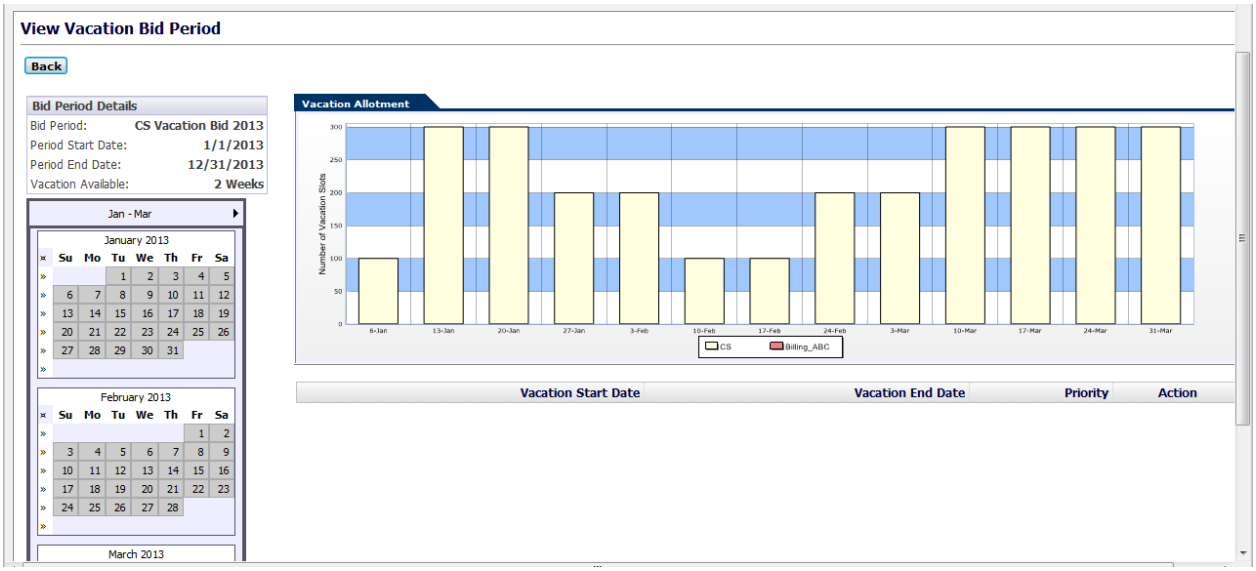


Figure 5.3 View Vacation Bid Period

5.3. Enter Vacation Bid Choices

To Enter Vacation Bid choices, an agent should click on the double arrows to the left of the vacation week choice in the Navigation Calendar box. Choices will be listed in the Bid Management box as shown in Figure 5.4. To change the priority order of a choice, the agent should use the green up and down arrows on the row to change, and to delete a choice, click on the *Delete* icon. Once the vacation week preferences are entered and ordered, the agent does not need to take any further step to save them. The last order existed in the *View Vacation Bid Period* page before a Vacation Bid period closes is the order considered for that agent.

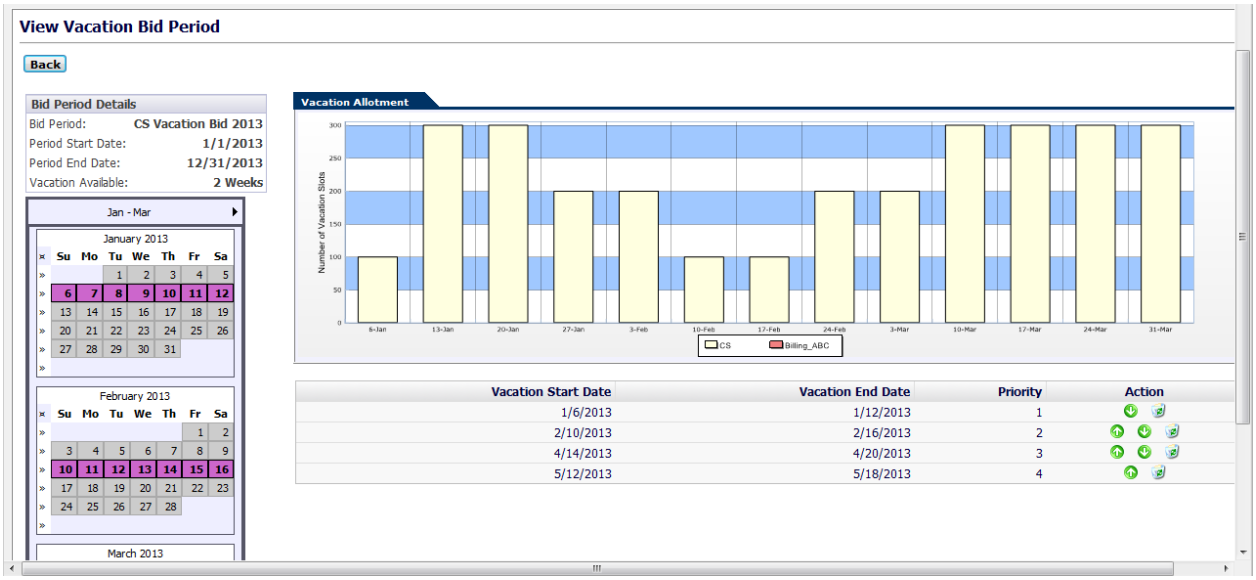


Figure 5.4 – Enter Vacation Bid Choices

6. Agents

The *Agents* module enables the user to manage the configuration of Agents within the System. The *Agents* module is accessible to Managers and Administrators only. An Agent belongs to an Organizational Unit, has skills to perform certain duties, and is available to perform these duties during certain times. Each agent is assigned a Tour Group (weekly work pattern) and a Shift Template (daily work pattern). This module is accessed by clicking on the *Agents* link on the *Bidding* drop-down menu as shown in Figure 6.1.

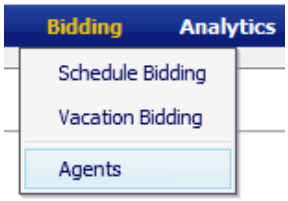


Figure 6.1

6.1. Manage Agents

The *Manage Agents* module displays a list of agents, which have been configured within the system as shown in Figure 6.2. Agents can be filtered by Name, HR ID, or simply display All Agents by using the *Filter* drop-down. The list can be ordered by Last Name, HR ID, Team Lead, Date Created/Modified by using the *Order By* drop-down.

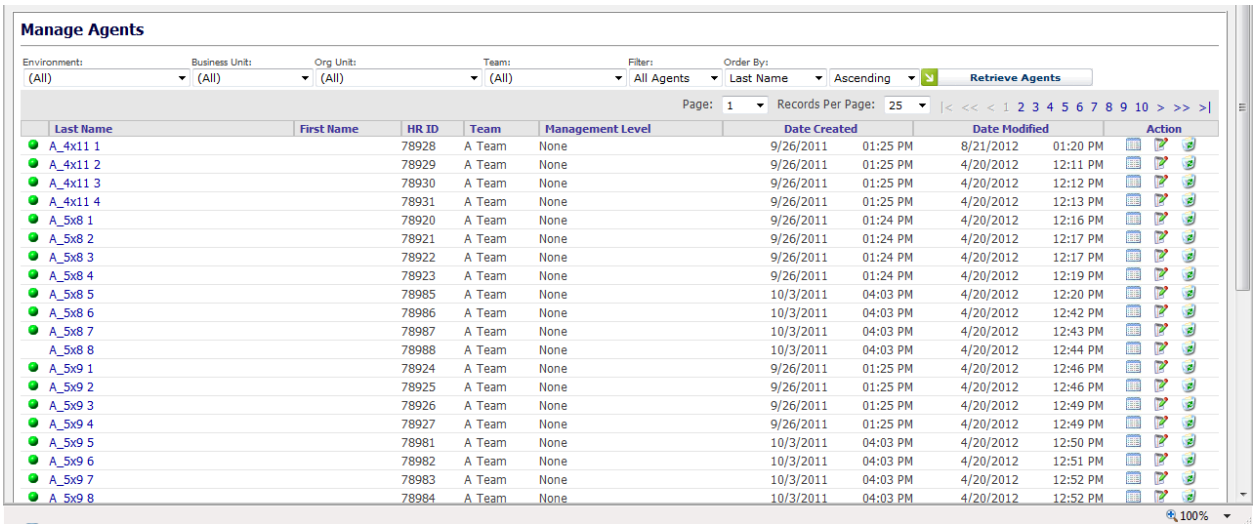


Figure 6.2 - Manage Agents

6.2. Add New Agent

The *Add New Agent* control allows adding a new Agent to the system. In order to add a new agent, the following information should be provided.

Field	Description
Last Name	Agent's Last Name
First Name	Agent's First Name
HR ID	Human Resources ID
Team Lead	Team Lead for this Agent – Drop-down selection
Environment	Environment for this Agent – Drop-down selection
Organizational Unit	Agent's Organizational Unit – Drop-down selection
Contact Group	Agent's Contact Group (skill) – Drop-down selection

Skill Level	Agent's Skill Level (highest: 1) – Drop-down selection
Shift	Default Shift for this Agent – Drop-down selection
Tour	Default Tour for this Agent – Drop-down selection
Management Level	Level at Which this Agent can Manage

Figure 6.3

Click on the *Add Agent* button to add the Agent to the database as shown in Figure 6.4.

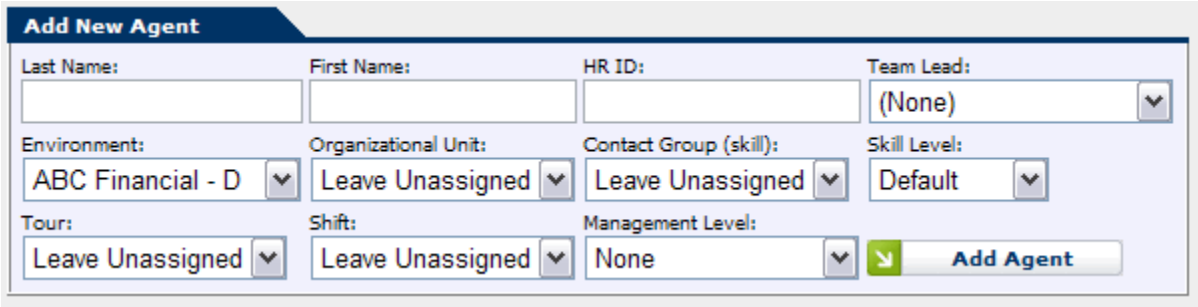


Figure 6.4 - Add New Agent

6.3. Edit Agent

The configuration for an agent can be edited by clicking the *Edit* link in the corresponding row in the Manage Agents module.

6.4. Edit Agent Summary

The *Edit Agent Summary* area handles editing of the following fields as shown in Figure 6.5. The user may create new agent attributes (e.g. address) to enter additional agent information. Agent Attributes created by the user will also be shown in the summary area.

Field	Description
Last Name	Agent's Last Name
First Name	Agent's First Name
Team Lead	Agent's Team Lead
HR ID	Human Resources ID
Email Address	Email Address for the Agent
Management Level	Level at Which this Agent can Manage
Date Created	Date the Agent record was created (**not editable**)
Date Modified	Date the Agent record was last modified (**not editable**)
Seniority Date	Default or a specific Seniority Date
Telephone 1	Primary Telephone Number for Agent
Telephone 2	Secondary Telephone Number for Agent

Figure 6.5

Once these fields have been modified, click the *Update* button to save the changes as shown in Figure 6.6. Click the *Cancel* button to return back to the *Manage Agents* module.

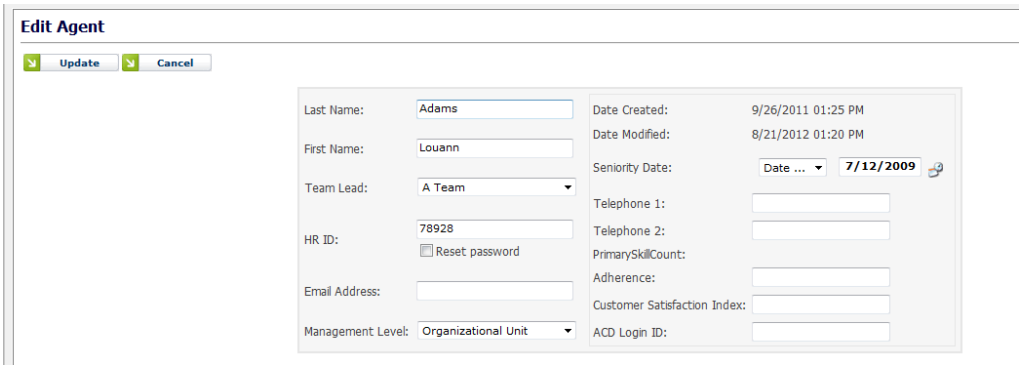


Figure 6.6 - Edit Agent Summary

6.5. Agent Assignments

The *Agent Assignments* tab of the *Edit Agent* module handles editing the Agent's Organizational Unit, Skills, and Tour Assignments as shown in Figure 6.7. To edit any of these fields, click on the *Edit* link in the corresponding row, make the appropriate changes, and then click on the *OK* link to save the changes. Clicking on the *Delete* link will remove that assignment. The changes will take affect when the *OK* or *Delete* link is clicked. To add a new Assignment, click on the *Add* button, select the appropriate fields, and then click on *OK* to save the new Assignment.

The following table details the fields in the *Agent Assignment* area:

Field	Description
Environment	Environment Agent of the Agent
Organizational Unit	Organizational Unit of the Agent
Start Date	Start Date, or Default for this record
End Date	End Date, or Default for this record
Tour Group	Tour Group assigned
Shift	Shift Template assigned
Minimum Hours Per Week	Minimum Number of Work Hours Agent is available
Maximum Hours Per Week	Maximum Number of Work Hours Agent is available
Default Fixed Schedule	Equals "Yes" if the agent is on a fixed schedule, and "No" otherwise
Default Must-Work	Equals "Yes" if the agent must be scheduled ("Must-Work"), and "No" otherwise
Active	Agent's state -if "No", the agent will not be scheduled

Figure 6.7

Once these fields have been modified, click the *Update* button to save the changes as shown in Figure 6.8. Click the *Cancel* button to return back to the *Manage Agents* module.

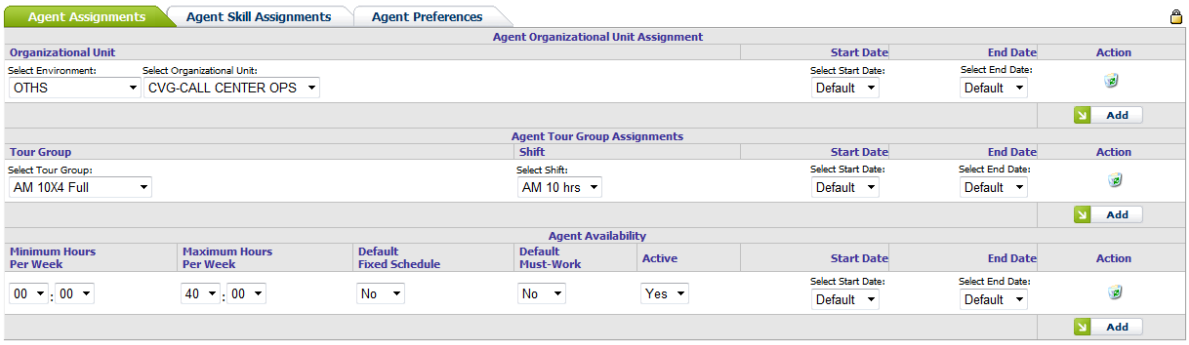


Figure 6.8 – Agent Assignments

6.6. Agent Skill Assignments

The *Agent Skill Assignments* tab of the *Edit Agent* module provides functionality to add or edit an Agent's skills as shown in Figure 6.9.

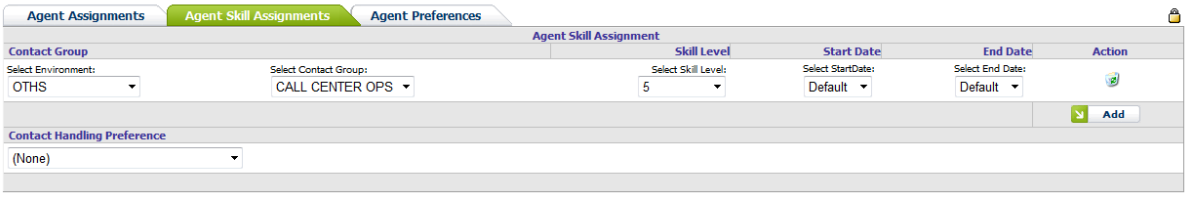


Figure 6.9 – Agent Skill Assignments

6.7. Agent Preferences

The *Agent Preferences* tab of the *Edit Agent* module provides functionality to enter or edit an Agent's Weekly and Daily Preferences as shown in Figure 6.10. To edit any of these values simply select from the drop-downs under Start Time an End Time. To add a new date range, enter the date range and click on the Add New Date Range button. To delete a date range, check the box to the left of the row(s) to delete and click on the Delete button.

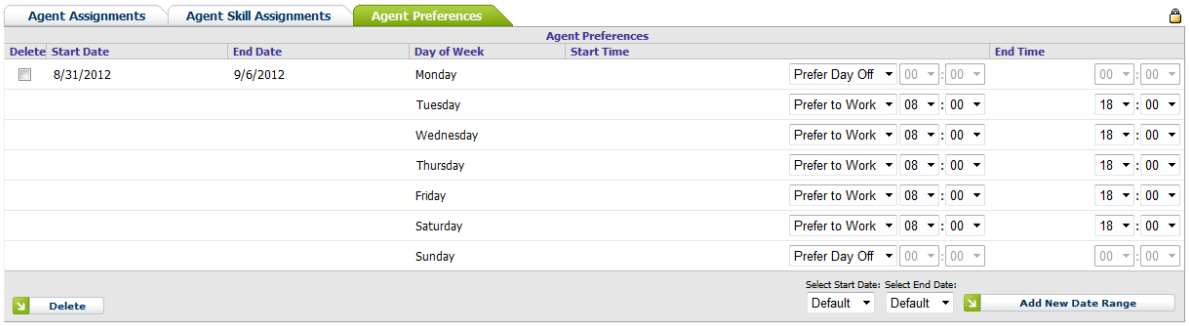


Figure 6.10 - Agent Preferences

6.8. Delete Agent

Clicking on the *Delete* icon of the *Manage Agents* module will remove the Agent in the corresponding row from the database.

7. Analytics

The *Analytics* module allows the user to view Dashboards, Scorecards, Reports and Agent Exceptions counts.

7.2. Dashboards

The *Dashboards* module is used to view in chart format the details of metrics such as calls offered, handling time, service levels, etc. at a glance. This module is accessed by clicking on the *Dashboards* link on the *Analytics* drop-down menu as shown in Figure 7.1.

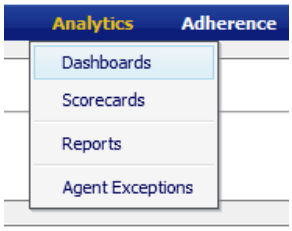


Figure 7.1

7.2.1. Configuration

The *Configuration* section of the Dashboard allows the user to change what is to be charted by selecting the Start and End Dates, Environment and Dashboard Type as shown in Figure 7.2. The *Configuration* section can be collapsed by clicking on the *Arrow* icon above this area.

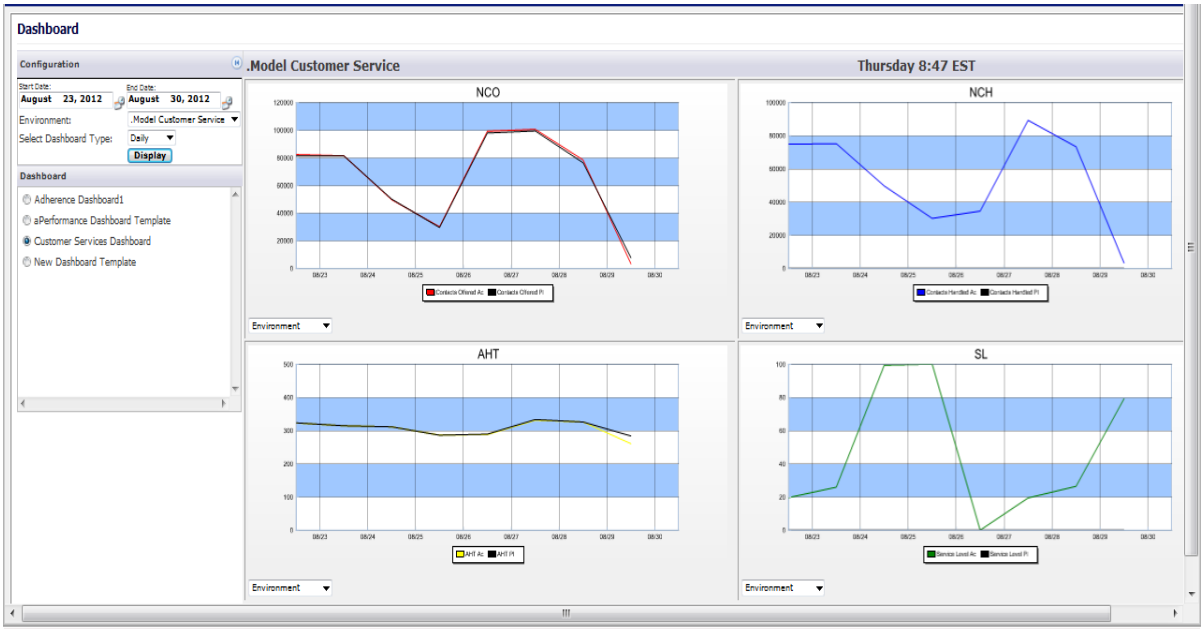


Figure 7.2 – Dashboard

7.2.2. Dashboard

The *Dashboard* section displays a list of the dashboards available for selection as shown in Figure 7.3. New Dashboards can be configured by the user by clicking on the *Dashboard Configuration* link on the Administrator - Configuration drop down menu (see section 9.1.3.)

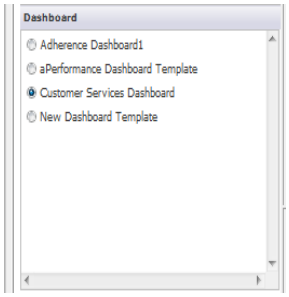


Figure 7.3

7.3. Scorecards

The *Scorecards* module is used to see the Performance and Adherence at different levels. Performance includes Service Level, Abandoned Percentage, Calls Offered, Calls Handled, Handling Time and ASA. Adherence includes Adherence Percentage, Shrinkage Percentage, Occupancy Percentage, Planned Handling Time and Actual Handling Time. This module is accessed by clicking on the *Scorecard* link on the *Analytics* drop-down menu as shown in Figure 7.4

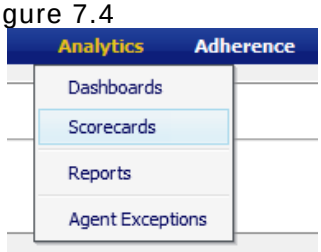


Figure 7.4

7.3.1. Performance

On the *Performance* tab the user has the option to change the Scope by clicking on the *Environment* link in the Scope column and drilling down to the Contact Group level. To return to the Environment level simply click on the word "Environments" on the navigation bar below the tabs as shown in Figure 7.5.

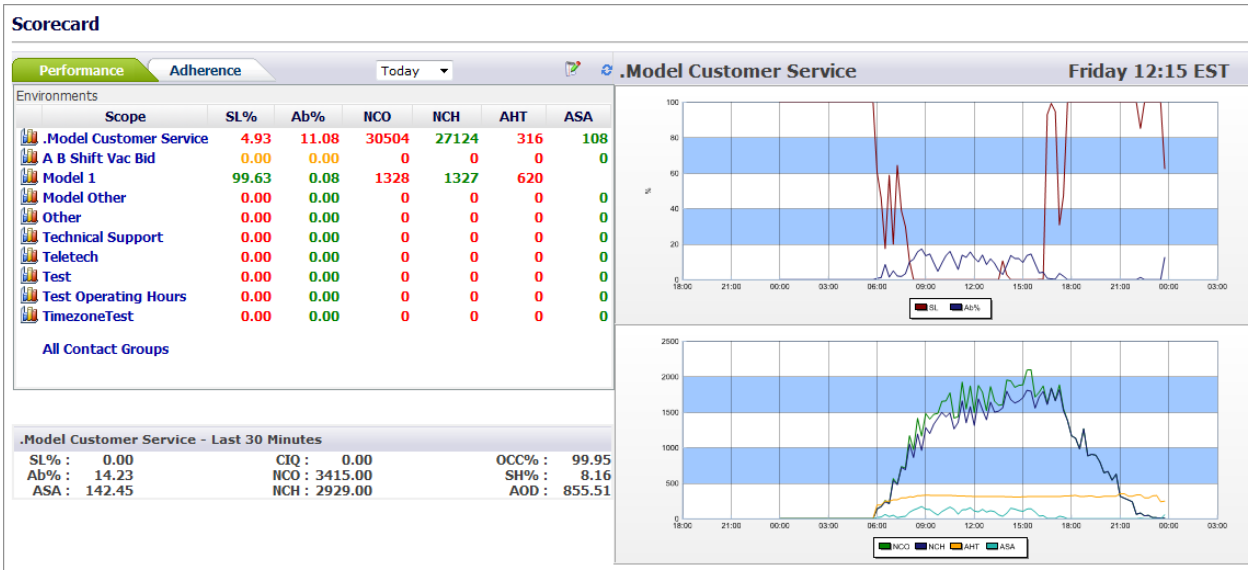


Figure 7.5 – Scorecard Performance

7.3.2. Adherence

On the *Adherence* tab the user has the option to change the Scope by clicking on the *Environment* link in the Scope column and drilling down to the Team level. To return a level simply click on the word on the navigation bar below the tabs as shown in Figure 7.6.

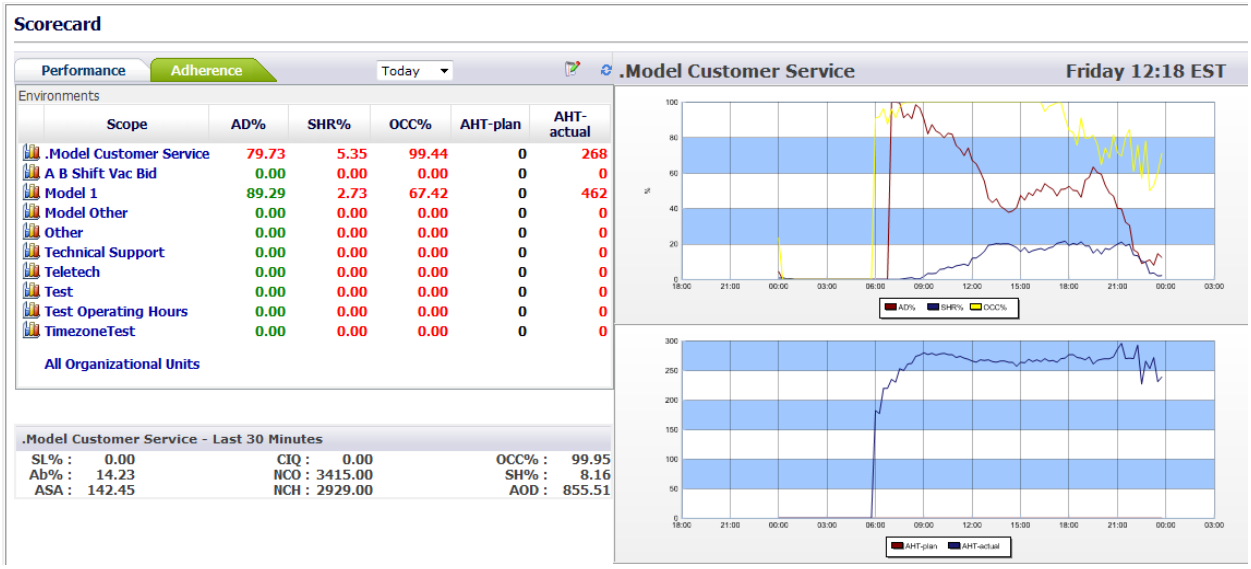


Figure 7.6 – Scorecard Adherence

7.3.3. Configure Scorecard

This option allows the user to define the thresholds for each area and metric on either the Performance tab or the Adherence tab. To reach this page, click on the *Configure Scorecard* icon as shown in Figure 7.7. The appropriate Configure Status box will be displayed.

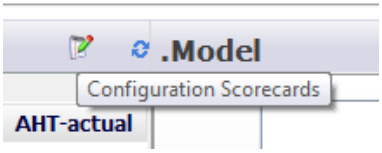
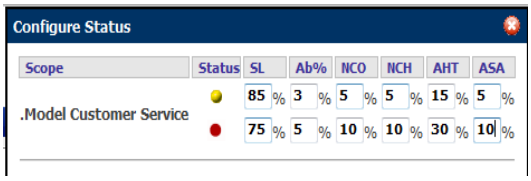


Figure 7.7 – Configuration Scorecards

For each area enter the value for each metric and click on the *Save* button. To close the page without saving click on the *Cancel* (red ball) icon on the title bar as shown in Figure 7.8. When the value reaches the limits configured, their status will be indicated by the color specified. For NOC, AHT, NCH and ASA the limits are for the % of deviation from the forecast.

Performance tab



Adherence tab

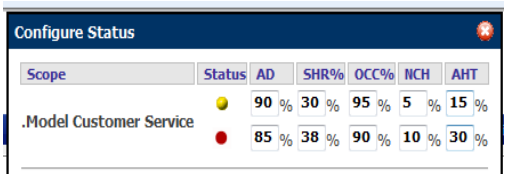


Figure 7.8 – Configure Status

7.4. Reports

The *Reports* module is used to view configured reports. This module is accessed by clicking on the *Reports* link on the *Analytics* drop-down menu as shown in Figure 7.9. The user has the option to select different reports, environments, contact groups and date ranges using the drop-downs as shown in Figure 7.10. Data from this page can be downloaded as well.

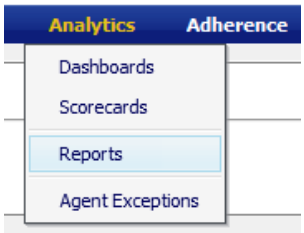
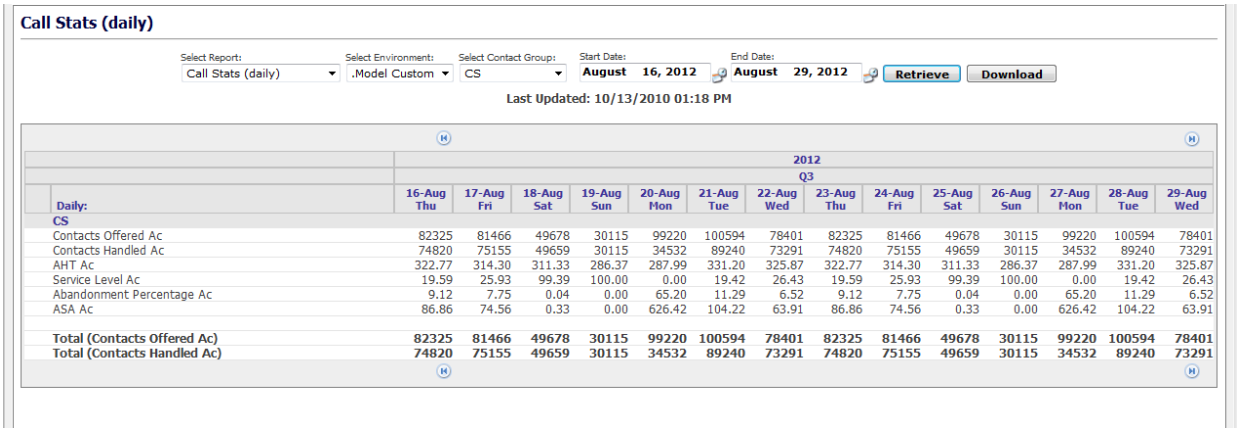


Figure 7.9



	2012													
	Q3													
Daily:	16-Aug Thu	17-Aug Fri	18-Aug Sat	19-Aug Sun	20-Aug Mon	21-Aug Tue	22-Aug Wed	23-Aug Thu	24-Aug Fri	25-Aug Sat	26-Aug Sun	27-Aug Mon	28-Aug Tue	29-Aug Wed
CS														
Contacts Offered Ac	82325	81466	49678	30115	99220	100594	78401	82325	81466	49678	30115	99220	100594	78401
Contacts Handled Ac	74820	75155	49659	30115	34532	89240	73291	74820	75155	49659	30115	34532	89240	73291
AHT Ac	322.77	314.30	311.33	286.37	287.99	331.20	325.87	322.77	314.30	311.33	286.37	287.99	331.20	325.87
Service Level Ac	19.59	25.93	99.39	100.00	0.00	19.42	26.43	19.59	25.93	99.39	100.00	0.00	19.42	26.43
Abandonment Percentage Ac	9.12	7.75	0.04	0.00	65.20	11.29	6.52	9.12	7.75	0.04	0.00	65.20	11.29	6.52
ASA Ac	86.86	74.56	0.33	0.00	626.42	104.22	63.91	86.86	74.56	0.33	0.00	626.42	104.22	63.91
Total (Contacts Offered Ac)	**82325**	**81466**	**49678**	**30115**	**99220**	**100594**	**78401**	**82325**	**81466**	**49678**	**30115**	**99220**	**100594**	**78401**
Total (Contacts Handled Ac)	**74820**	**75155**	**49659**	**30115**	**34532**	**89240**	**73291**	**74820**	**75155**	**49659**	**30115**	**34532**	**89240**	**73291**

Figure 7.10 – Reports

New Reports can be configured by the user by clicking on the *Report Configuration* link on the Administrator - Configuration drop down menu (see section 9.1.2)

7.5. Agent Exceptions

The *Agent Exceptions* module allows the user to view exception counts. This module is accessed by clicking on the *Agent Exceptions* link on the *Analytics* drop-down menu as shown in Figure 7.11.

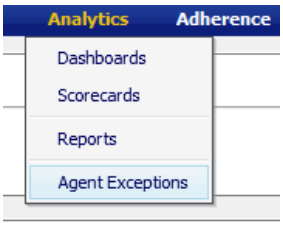


Figure 7.11

7.5.1. Agent Exceptions Query

The user has the option to select Environments, Business Units, Organizational Units, Exception Types and Exception Status. Once the selections have been made, click on the *View Results* button as shown in Figure 7.12. From this page the user can also download the results.

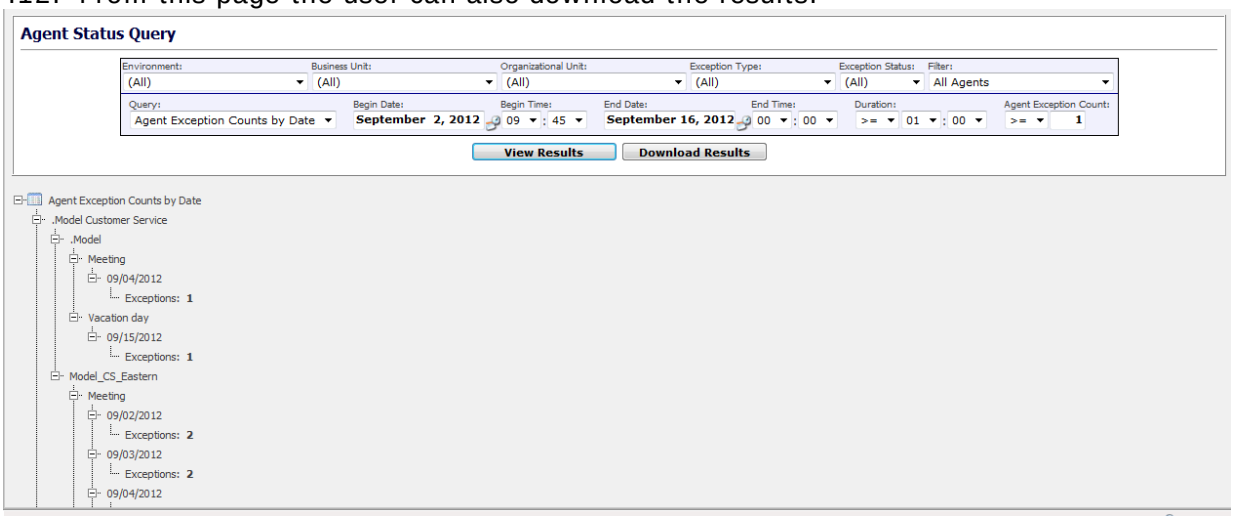


Figure 7.12 – Agent Excetpions

8. Adherence

The *Adherence* module allows the user to view Agent Adherence, Real-Time Adherence and Adherence Scorecard. The *Agent Adherence* and *Real-Time Adherence* links on the *Adherence* drop-down menu are accessible to Managers and Administrators only.

8.1. Agent Adherence

The *Agent Adherence* module shows the list of agents and their adherence scores. From this page the user can monitor agent adherence, send a warning message, configure the thresholds and download data. This module is accessed by clicking on the *Agent Adherence* link on the *Adherence* drop-down menu as shown in Figure 8.1.

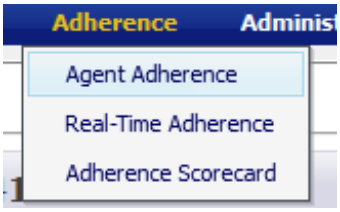


Figure 8.1

8.1.1. Agent Adherence Page

When the *Agent Adherence* page is first reached "All" agents (currently working if the current day is selected for monitoring) will be displayed as shown in Figure 8.2. The user has the option to change the Scope by clicking on the Environment name in the Scope list and drilling down to the Team level. To return to the Environment level simply click on the word "Environments" on the navigation bar below the tabs.

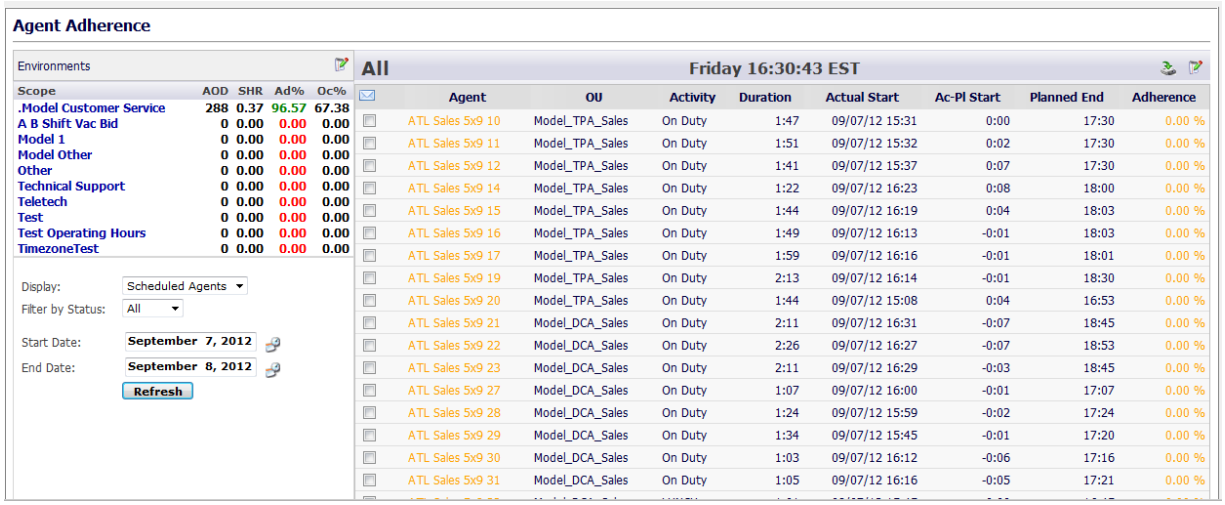


Figure 8.2 – Agent Adherence

8.1.2. Shift History

The *Shift History* is accessed by clicking on the agent link. From the *Shift History* box the user can send a message to an agent. To send the message click on the *Send History* button to open the Comments to Agent box then click on send as shown in Figure 8.3.

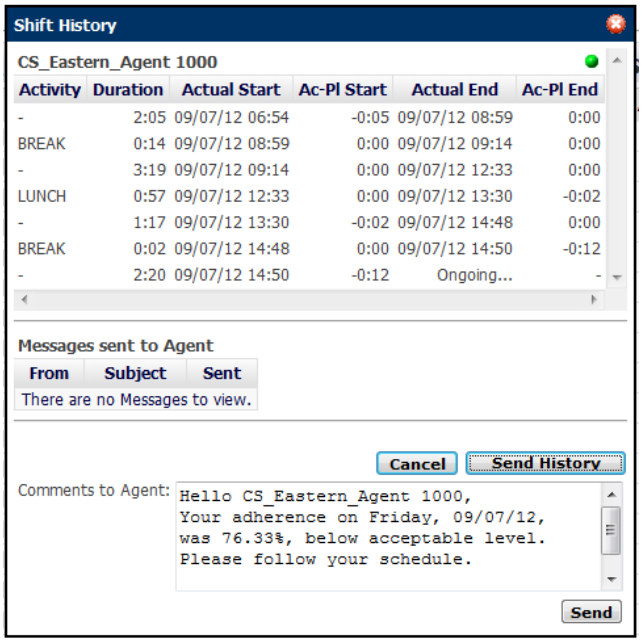


Figure 8.3 – Shift History

8.1.3. Warning Message

A warning message can be sent to agent(s) by checking the box to the left of the agents name and then clicking on the *Email* icon at the top. The messages are sent to SMS, Email or the Agents Homepage depending on the Messaging Configuration defined by the user as described in section 9.1.4. An example of the message to the Homepage is shown in Figure 8.4.

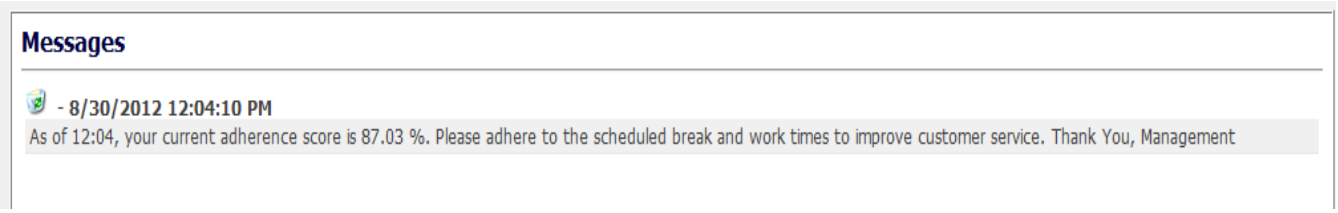


Figure 8.4 – Warning Message for Adherence

8.1.4. Configure Status

Clicking on the *Configure Agent Adherence* icon above the Adherence column will display the Configure Status box as shown in Figure 8.5. When the value reaches the limits configured, the adherence status will be indicated by the color specified.

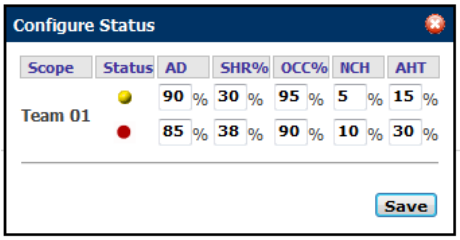


Figure 8.5 – Configure Status

8.1.5. Refresh Rate

Clicking on the *Configure Agent Adherence* icon will display the Configure Agent Adherence box as shown in Figure 8.6. Select from the drop-down lists the number of minutes and seconds for the refresh rate.

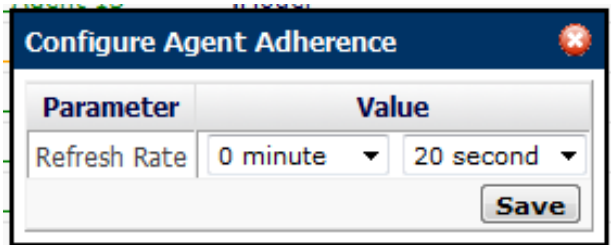


Figure 8.6 – Configure Agent Adherence

8.1.6. Download Data

Clicking on the *Download* icon above the Adherence column will display the message prompt to Open or Save the file. The user can save the file to any destination folder as shown in Figure 8.7.

	A	B	C	D	E	F	G	H
1	Agent Performance							
2								
3	Organizational Unit:	.Model						
4	Start Date:	8/30/2012						
5	End Date:	8/31/2012						
6								
7	Organizational Entity	AOD	SHR	Ad%	Oc%			
8	Team 01	284	0.31	96.43	71.11			
9								
10	Summary - Last 30 minutes:							
11	Agents on duty:	56						
12	Agents on break:	0						
13	Adherence:	98.87%						
14	Shrinkage:	0.20%						
15	Abandonment:	1.12%						
16	Service Level:	74.94%						
17								
18	Agent Activity:							
19	Agent	OU	Activity	Duration	Actual Start	Ac-Pl Star	Planned E	Adherence
20	CS_Eastern_Agent 10	.Model	-	2:20	8/30/2012 11:27	-0:02	13:47	87.03%
21	CS_Eastern_Agent 13	.Model	-	2:11	8/30/2012 11:31	0:00	13:45	86.29%
22	CS_Eastern_Agent 14	.Model	-	2:19	8/30/2012 11:28	-0:01	13:47	84.09%
23	CS_Eastern_Agent 15	.Model	-	2:14	8/30/2012 11:30	0:00	13:45	87.27%
24	CS_Eastern_Agent 16	.Model	-	2:17	8/30/2012 11:29	-0:03	13:47	86.27%
25	CS_Eastern_Agent 17	.Model	-	2:13	8/30/2012 11:32	0:00	13:45	87.19%
26	CS_Eastern_Agent 28	.Model	-	2:15	8/30/2012 11:32	0:01	13:47	86.71%
27	CS_Eastern_Agent 30	.Model	-	2:19	8/30/2012 11:27	-0:06	13:46	86.00%

AgentPerformance_.Model_2012083

Figure 8.7 – Download Agent Adherence

8.2. Real-Time Adherence

The *Real-Time Adherence* module is used to monitor employee activities and compare them to their schedules. This module is accessed by clicking on the *Real-Time Adherence* link on the *Adherence* drop-down menu as shown in Figure 8.8.

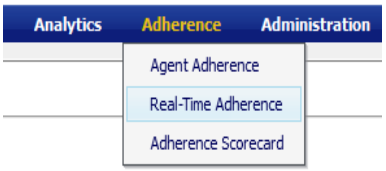


Figure 8.8

8.2.1. Opening New Profile Window

The user can create multiple windows to monitor one or more agent activity and/or schedule violation types. A set of windows created by the user may be stored as a profile for future use. To create a new profile, the user should click on the *New* icon to open the profile window as shown in Figure 8.9.

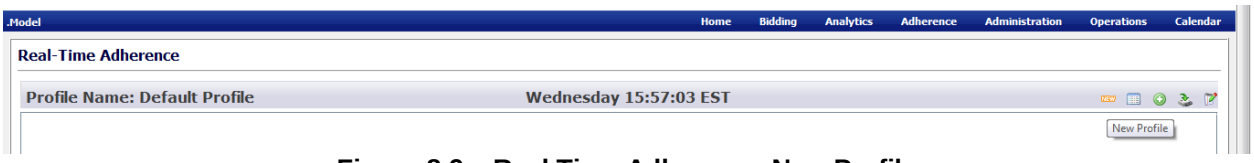


Figure 8.9 – Real Time Adherence New Profile

8.2.1.1. Opening Add Window

Click on the *Add Window* icon (green "+") to open the profile window, as shown in Figure 8.10.

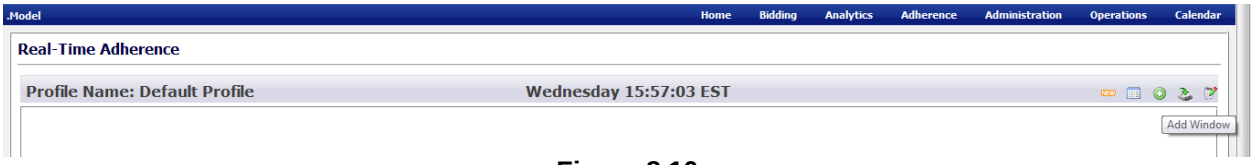


Figure 8.10

8.2.1.2. Creating New Window

To create a new window, the user must select one or more environments, business units, organizational units or agent names, and one or more alerts. In the Environments area, the user must click on Work Areas to select, and in the Alerts area, click on Alerts to monitor in the new window. To create the new window, the user should then click on the *New Window* link on the *Window* drop-down, enter a name for the new window, select a font size from the *Font Size* drop-down for displaying agent information, and click on *Monitor* as shown in Figure 8.11.

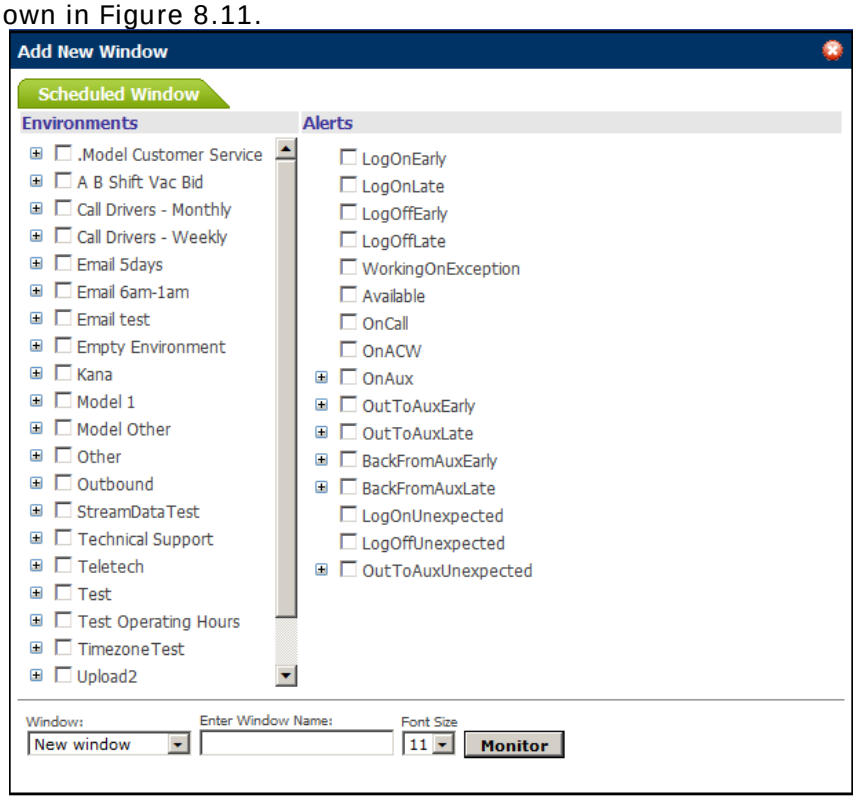


Figure 8.11

To edit an existing window, the user should select its name on the Window drop-down instead of *New Window*. The *Add New Window* popup will automatically display the configuration stored for the Window selected for editing.

8.2.1.3. Saving New Profile

To save a newly created Profile, the user should click on the *Profiles* icon, fill in Profile Name, Profile Description, select a Refresh Rate from the *Refresh Rate* drop-down, and then click on *Save Profile* as shown in Figure 8.12. The refresh rate specifies the frequency of update for the information in the windows of a Profile. If the user desires to view the Profile saved each time the *Real Time Adherence* page is reached, it should be marked as the Default Profile.

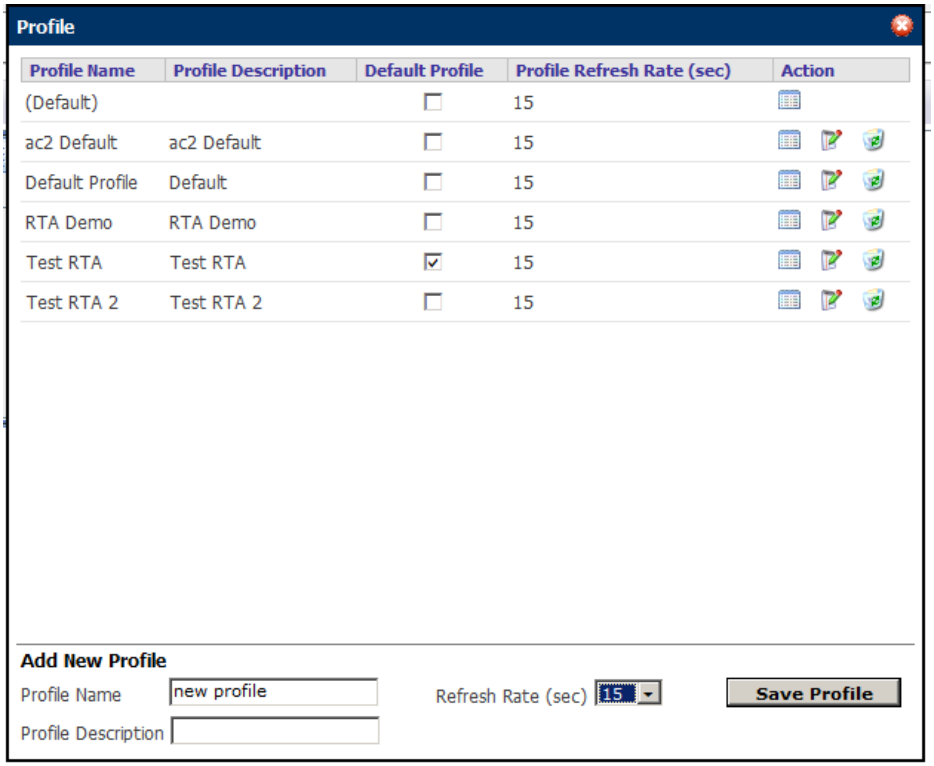


Figure 8.12

8.2.1.4 Editing Alert Configurations

To configure time limits for alerts and grace windows, the user should click on the *Edit Configuration* icon as shown in Figure 8.13.

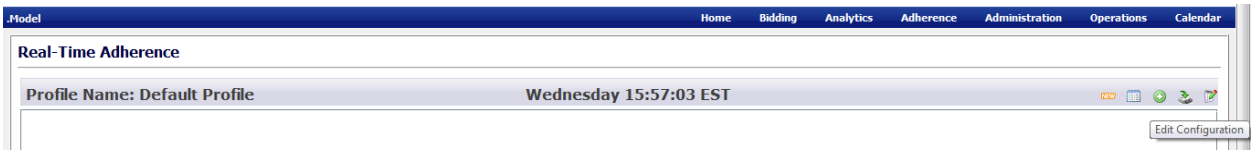


Figure 8.13

8.2.1.5. Setting Alert Configurations

In the Environments area, the user should click on the Work Areas for which the configurations entered will be applied. The user should then find the Alert Type to enter the following settings:

- A Grace Period in minutes is the time before the Alert Type shows in the window. Any deviation within the grace window of a scheduled start or end time is considered a non-violation.
- A Window Period in minutes is the time that will pass before the Alert Type will change form a violation to unexpected event. For example, when the Window Period for Login Late is set to 30 minutes, Login Late will be displayed if an agent logs in after the Grace period but within 30 minutes of the scheduled login time, and Login Unexpected will be displayed if the agent logs in after 30 minutes.
- An Expiration period in minutes is the time that will pass before the Alert Type will be removed the window.

A color for each Alert Type to show in the window can be selected by clicking on the *Color* drop-down. To save the alert configurations, click on the *Save* button, as shown in Figure 8.14.

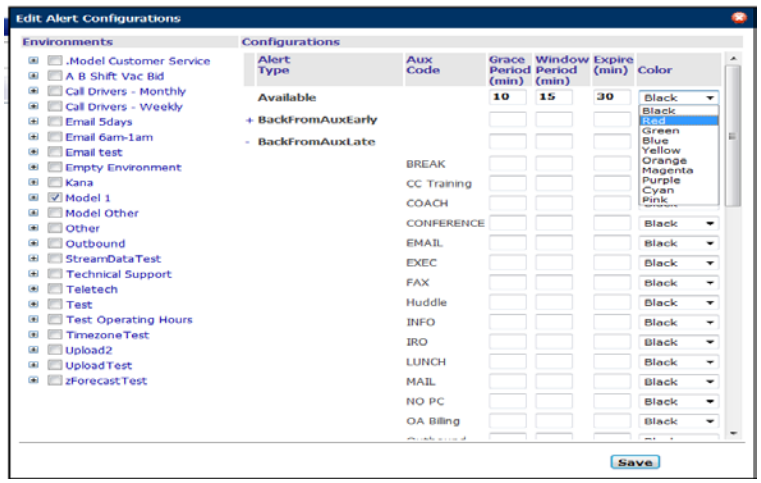


Figure 8.14

8.2.1.7. View Real-Time Adherence Windows

When a new or existing Profile is opened, the user will view agent activities and violations as shown in Figure 8.15. The data presented in the windows is updated based on the refresh rate set for the profile.

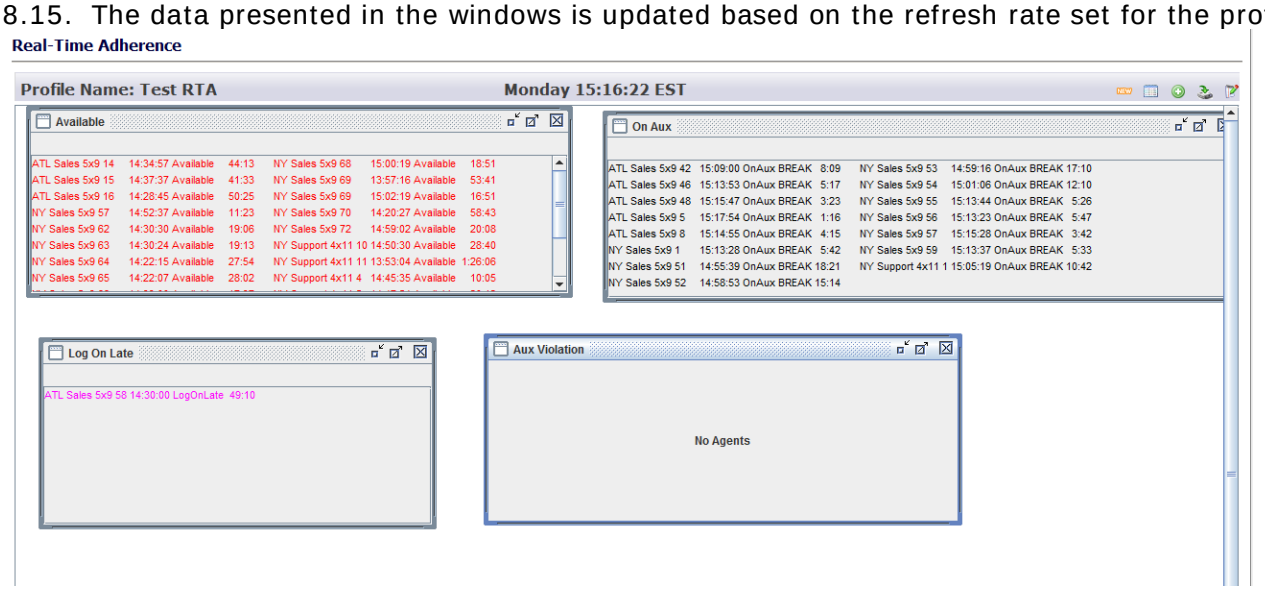


Figure 8.15

8.2.1.8 Download Window

To download Real-Time Adherence information into Excel, the user should click on the *Download Window* icon as shown in Figure 8.16.

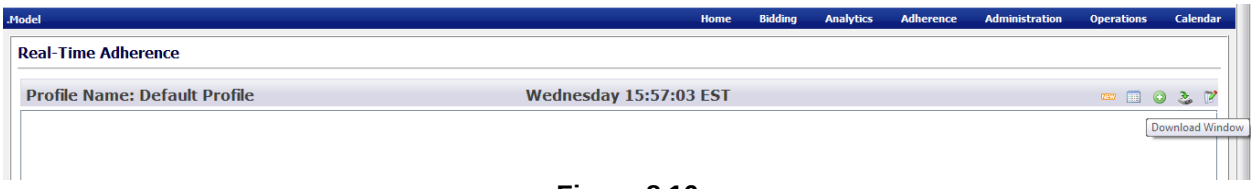


Figure 8.16

8.3. Adherence Scorecard

See section 7.3.2. for information on this page.

9. Administration

The *Administration* module allows the user to configure metrics, reports, dashboard and messaging. The *Administration* module is accessible to Managers and Administrators only.

9.1. Configuration

The *Configuration* modules are accessed by clicking on the then *Configuration* link on the *Administration* drop-down menu as shown in Figure 9.1.

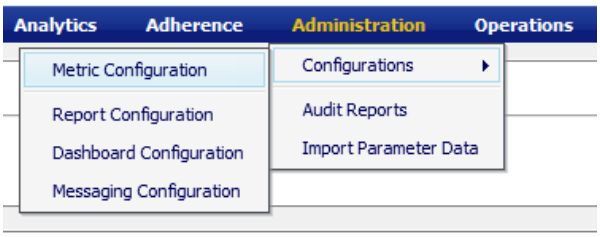
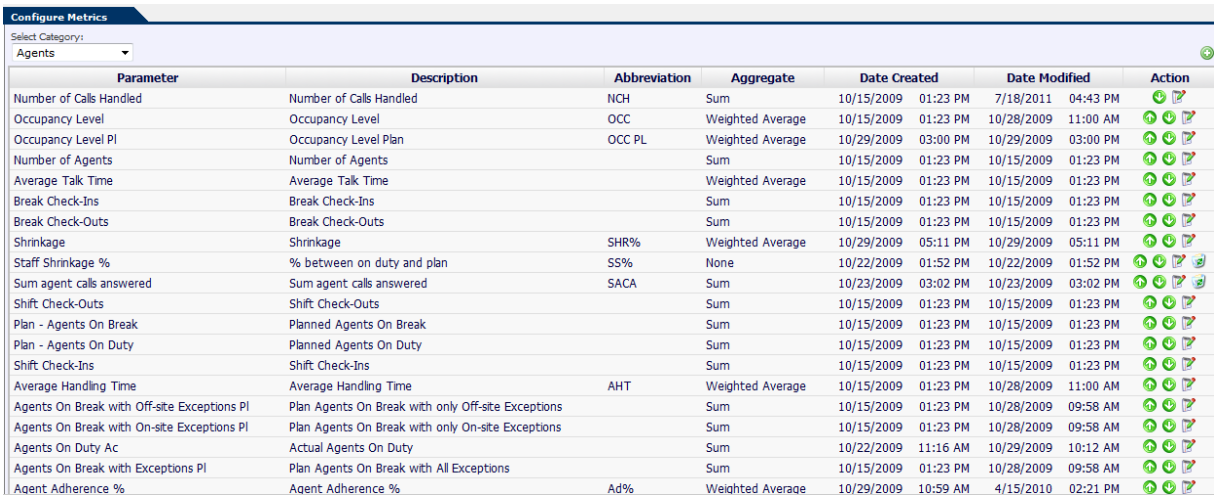


Figure 9.1

9.1.1. Metric Configuration

The *Metric Configuration* module allows the user to add a parameter by clicking on the *New Parameter* icon above the Action column as shown in Figure 9.2. Default system parameters will not have the *Delete* icon available in the Action column.



Configure Metrics

Select Category: Agents

Parameter	Description	Abbreviation	Aggregate	Date Created	Date Modified	Action
Number of Calls Handled	Number of Calls Handled	NCH	Sum	10/15/2009 01:23 PM	7/18/2011 04:43 PM	
Occupancy Level	Occupancy Level	OCC	Weighted Average	10/15/2009 01:23 PM	10/28/2009 11:00 AM	
Occupancy Level Pl	Occupancy Level Plan	OCC PL	Weighted Average	10/29/2009 03:00 PM	10/29/2009 03:00 PM	
Number of Agents	Number of Agents		Sum	10/15/2009 01:23 PM	10/15/2009 01:23 PM	
Average Talk Time	Average Talk Time		Weighted Average	10/15/2009 01:23 PM	10/15/2009 01:23 PM	
Break Check-Ins	Break Check-Ins		Sum	10/15/2009 01:23 PM	10/15/2009 01:23 PM	
Break Check-Outs	Break Check-Outs		Sum	10/15/2009 01:23 PM	10/15/2009 01:23 PM	
Shrinkage	Shrinkage	SHR%	Weighted Average	10/29/2009 05:11 PM	10/29/2009 05:11 PM	
Staff Shrinkage %	% between on duty and plan	SS%	None	10/22/2009 01:52 PM	10/22/2009 01:52 PM	
Sum agent calls answered	Sum agent calls answered	SACA	Sum	10/23/2009 03:02 PM	10/23/2009 03:02 PM	
Shift Check-Outs	Shift Check-Outs		Sum	10/15/2009 01:23 PM	10/15/2009 01:23 PM	
Plan - Agents On Break	Planned Agents On Break		Sum	10/15/2009 01:23 PM	10/15/2009 01:23 PM	
Plan - Agents On Duty	Planned Agents On Duty		Sum	10/15/2009 01:23 PM	10/15/2009 01:23 PM	
Shift Check-Ins	Shift Check-Ins		Sum	10/15/2009 01:23 PM	10/15/2009 01:23 PM	
Average Handling Time	Average Handling Time	AHT	Weighted Average	10/15/2009 01:23 PM	10/28/2009 11:00 AM	
Agents On Break with Off-site Exceptions Pl	Plan Agents On Break with only Off-site Exceptions		Sum	10/15/2009 01:23 PM	10/28/2009 09:58 AM	
Agents On Break with On-site Exceptions Pl	Plan Agents On Break with only On-site Exceptions		Sum	10/15/2009 01:23 PM	10/28/2009 09:58 AM	
Agents On Duty Ac	Actual Agents On Duty		Sum	10/22/2009 11:16 AM	10/29/2009 10:12 AM	
Agents On Break with Exceptions Pl	Plan Agents On Break with All Exceptions		Sum	10/15/2009 01:23 PM	10/28/2009 09:58 AM	
Agent Adherence %	Agent Adherence %	Ad%	Weighted Average	10/29/2009 10:59 AM	4/15/2010 02:21 PM	

Figure 9.2 – Configure Metrics

9.1.1.1. New Parameter

The *Edit Metric* page will be displayed after clicking on the *New Parameter* icon as shown in Figure 9.3. The user should enter the name, description, abbrevation, select the type from, the aggregation, the operation type, the first operand from the drop-downs. To save the metric click on the *Save* button. To cancel without saving click on the *Cancel* button.

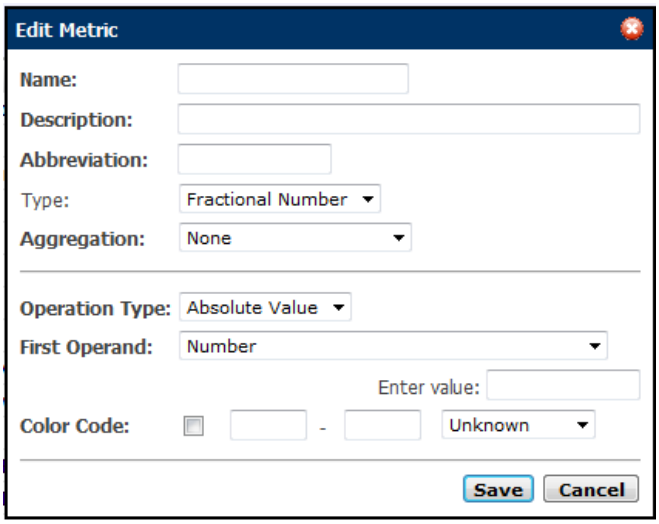


Figure 9.3 – Edit Metric

9.1.2. Report Configuration

The *Report Configuration* module allows the user to configure report templates used for the *Analytics - Reports* module as shown in Figure 9.4. The Custom Report Configuration component, on the left side of the page, contains the list of report templates configured in the system. Interaction with the component is primarily through the context menu, which is accessed by right-mouse-clicking on items in the list.

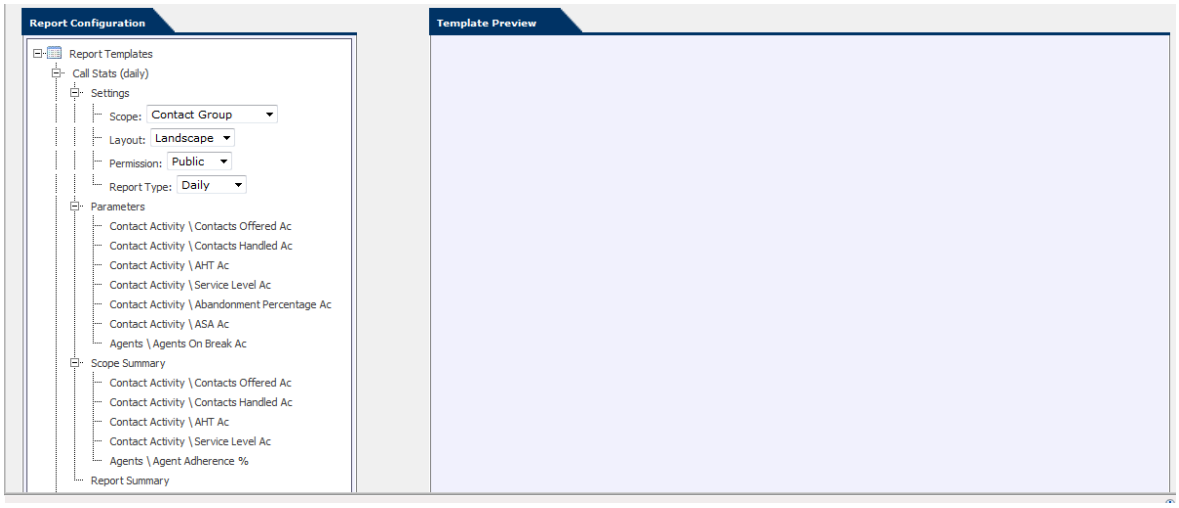


Figure 9.4 – Configure Reports

9.1.2.1. Add New Report Template

A new report template may be created by right-clicking on the Report Templates item, and selecting Add Report Template.

9.1.2.2. Delete Report Template

A report template may be deleted by right-clicking on a report item, and selecting Delete Report Template.

9.1.2.3. Report Templates

Report templates have four sets of properties that can be configured in the Custom Report Configuration component.

9.1.2.3.1. Settings

Report templates have overall properties that are configured within the Settings item under each report.

- The Scope may be configured at the Environment, Business Unit, Organizational Unit, Contact Group, or Stream level. The scope level selected limits the levels at which aggregation can take place.
- The layout selected may be either Landscape or Portrait, which determines whether the fields are arranged as rows or columns in the displayed report.
- The permission selected can control what users are able to access the report to view. Public reports are viewable by any user; Private reports are viewable only by authorized users.

9.1.2.3.2. Parameters

The Parameters set of properties is a list of data items that a user can add to the report template. These items are displayed for each element, such as an Organizational Unit or Contact Group, which is selected to be displayed by the user. A parameter may be added by right-clicking on the Parameters item, moving over the Add Item menu to display the list of available data item categories, moving over the appropriate category to display the available data items within the category, and then selecting the desired data item. The data items available include both built-in items and those items added in the Metric Configuration module. A parameter may be removed by right-clicking on the parameter, and then selecting the Remove Item menu option.

9.1.2.3.3. Scope Summary

The Scope Summary section is similar to the Parameters section, except that this section determines what additional fields will be displayed at the end of each scope sub-section.

9.1.2.3.4. Report Summary

The Report Summary section is similar to the Parameters section, except that this section determines what fields will be displayed in the summary section for the report. Values in this section are calculated by summing the individual values for the individual scope sub-sections.

9.1.3. Dashboard Configuration

The *Dashboard Configuration* module allows the user to configure dashboards used for the *Analytics - Dashboard* module as shown in Figure 9.5.

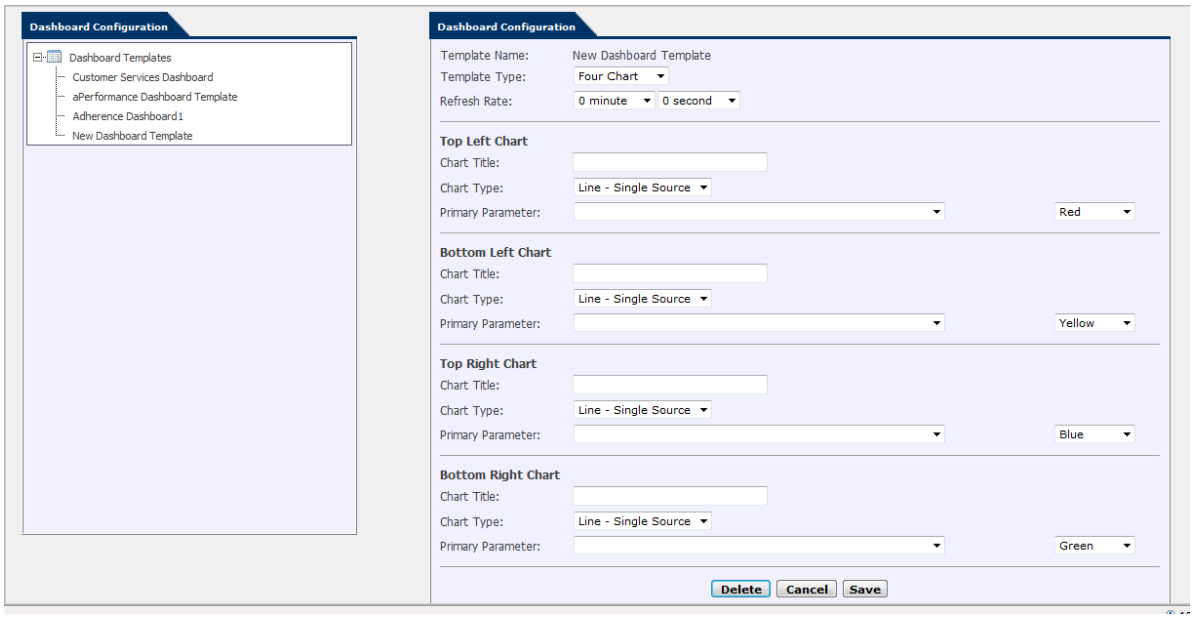


Figure 9.5 – Dashboard Configuration

9.1.3.1. Add New Dashboard Template

A new dashboard may be created by right-clicking on the Dashboard Templates item, and selecting Add Report Template.

9.1.3.2. Delete Dashboard Template

A dashboard may be deleted by right-clicking on a dashboard item, and selecting Delete Dashboard Template.

9.1.3.3. Dashboard Templates

Dashboard has the option to include one to four charts that can be configured in the Custom Dashboard Configuration component. Each chart requires a Title, Type, Primary Parameter and Color as shown in Figure 9.6. Chart types include Line – Single Source, Line – Two Sources, Bar – Single Source, Bar – Two Sources, and any combination.

Figure 9.6 – Dashboard Template

9.1.4. Messaging Configuration

The *Messaging Configuration* module allows the user to set how agents will be notified for Adherence issues, Schedule Changes and Exception approval and rejections as shown in Figure 9.7. The choices are SMS (Short Message Service), Email and Agent Homepage. Settings are done by Organizational Units. In order for agents to receive SMS and email messages, the AWO Portal must be connected with your mail server, and agents' telephone and email addresses must be entered into the AWO Database using the *Agent* page.

Figure 9.7 – Agent Notification

9.2. Audit Reports

The *Audit Reports* module provides reports on Website access by Users and Agents. This module is accessed by clicking on the *Audit Reports* on the *Administration* drop-down menu as shown in Figure 9.8. It lists active users and tracks their activities as shown in Figure 9.9.

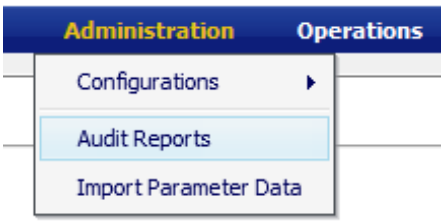


Figure 9.8

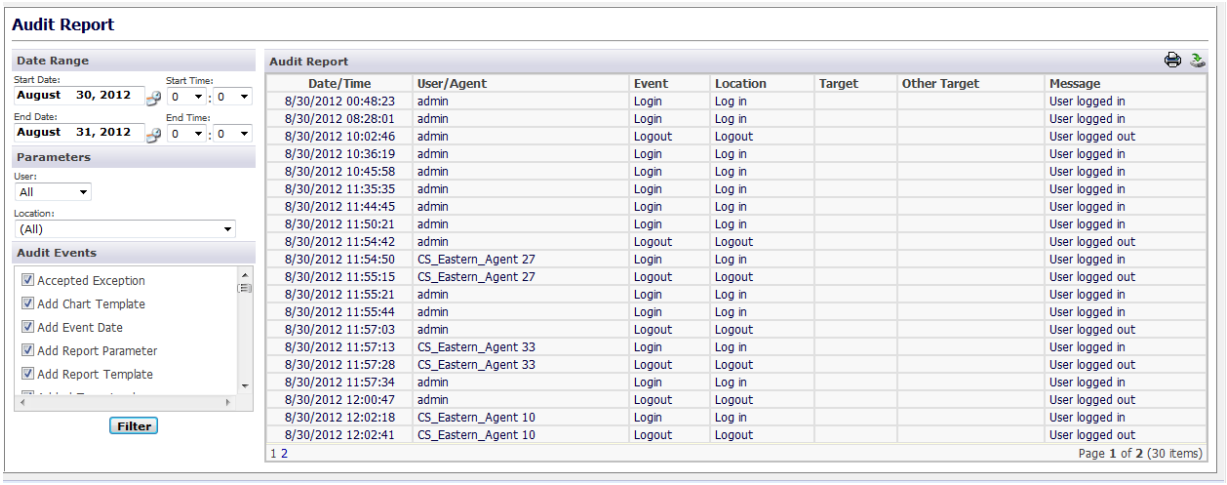


Figure 9.9 – Audit Reports

9.2.1. Download User Log

The results can be downloaded into an Excel spreadsheet by clicking the *Download* link. Upon downloading, the option to open or save the file will be displayed.

10. Operations

The *Operations* module offers functionality for intra-day management of performance. The *Operations* module is accessible to Managers and Administrators only. In the *Update Forecast* module, the user has the ability to review the intra-day forecasts and make updates as operational conditions change. Additionally, as these occur, the resulting needs for staffing may change. Staffing levels can be adjusted in the *Performance Optimizer* module by determining how much additional work time (AWT) or volunteer time off (VTO) should be offered. In the *Agent Skill Management* module, the user manages the agent skills and makes changes as needed to eliminate service level imbalances.

10.1. Update Forecasts

The *Update Forecasts* module is used to monitor the forecast and adjust it if necessary. This module is accessed by clicking on the *Update Forecast* link on the *Operations* drop-down *m*enu as shown in Figure 10.1.

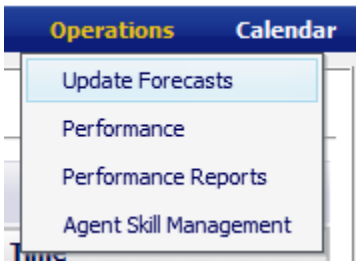


Figure 10.1

10.1.1. Operational Forecasts

In the Configure box on the *Operational Forecasts* page, the user has the option to select an Environment, Contact Group, change the Bucket size, enter Start and End dates and time, view different items and adding data items to the charts as shown in Figure 10.2. After selecting options click on the *Redraw* button to refresh the charts.

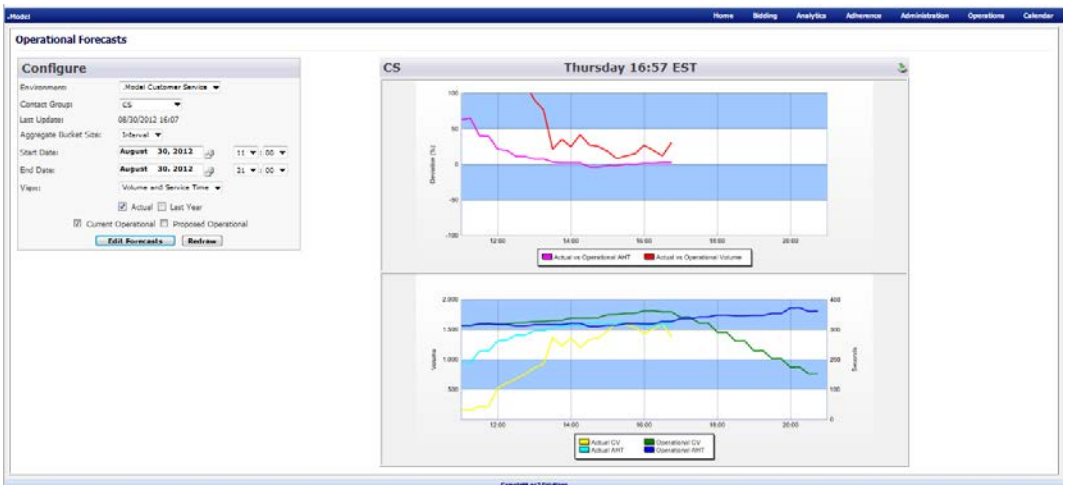


Figure 10.2 – Operational Forecasts

10.1.2. Edit Forecasts

To reach the *Edit Forecasts* page click on the *Edit Forecast* button. On this page the Actual column shows the actual data streaming in, the Current Operation column shows the most recent published/official forecasts, and the Proposed Operation column the Website's re-forecast based on the actual data over the time period selected for both call volume and average handling time. The % Variation is between the Actual and the Current Operation so that the user can see if the actauls have been higher or lower than the forecasts and can adjust the Current Operational forecasts either by directly editing or entering a percentage as shown in Figure 10.3.

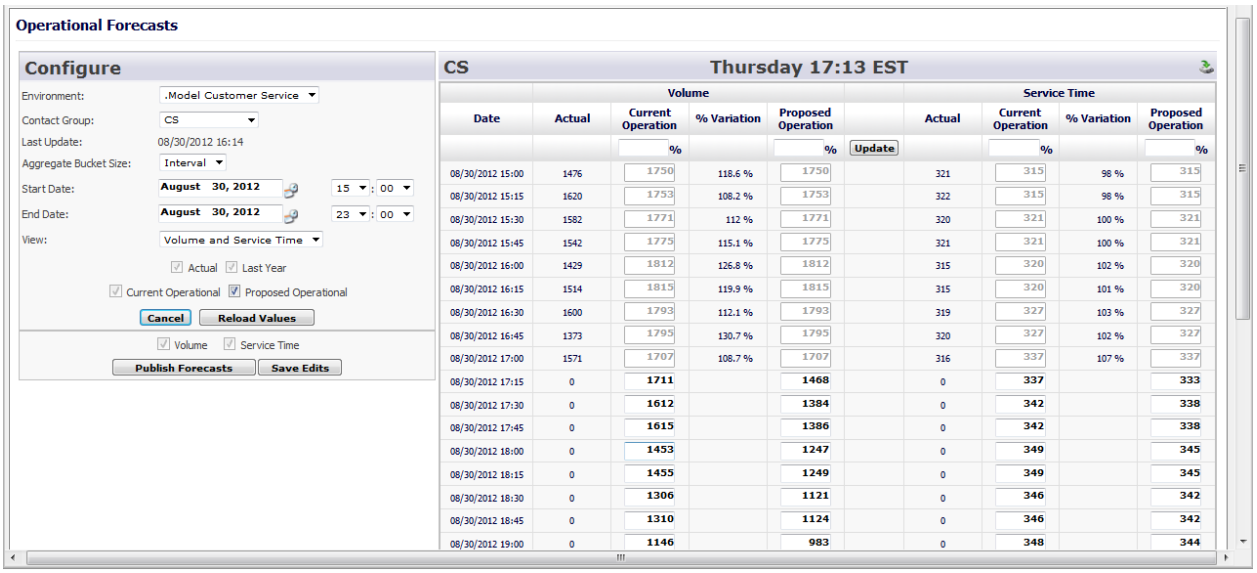


Figure 10.3 – Operational Forecasts

10.2. Performance

The *Performance* module is used to manage staffing levels by determining how much AWT or VTO should be offered to meet the service level targets while minimizing excess agent costs. This module is accessed by clicking on the *Performance* link on the *Operations* drop-down menu as shown in Figure 10.4.

Figure 10.4

10.2.1 Performance Optimizer

The *Performance Optimizer* page provides functionality to carry out staffing and service level tradeoff analysis. It allows resetting several parameters and targets in the Advanced Parameters, VTO/AWT and

Approved Exceptions areas, and analyzing performance with these settings. Once the desired parameters are reset, the user can click on the *Redraw* button to refresh the Chart.

10.2.1.1. Advanced Paramaters

The Advanced Parameters area permits changing parameters such as the service level target, customer impatience as described by the abandonment rate and average wait time, percentage adjustment to contact volumes, average handling times and agent on duty counts. Changes to Adjust Agent-On-Duty may or may not be carried by adjusting break counts and durations.

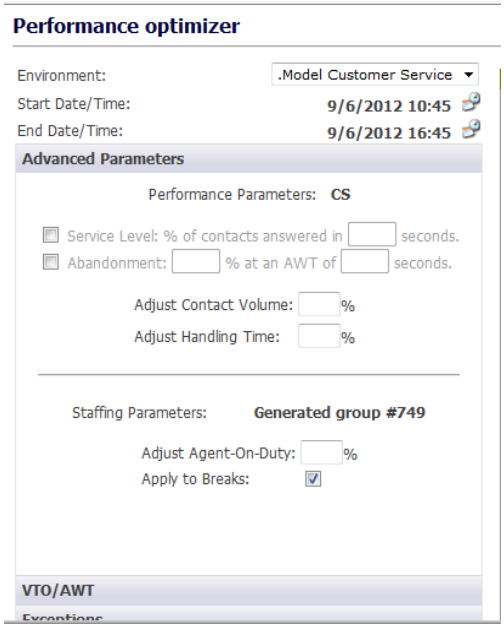


Figure 10.5- Advanced Parameters area

10.2.1.1. VTO/AWT

When the *Redraw* button is clicked, the *Performance Optimizer* page generates the required AWT or VTO automatically to meet the service level targets. These time slots are normally multiples of 15 minutes in length. The user can specify a Minimum and Maximum Offer Duration for the slots that may be generated by the *Performance Optimizer* page. AWT/VTO slots can also be entered by the user manually to analyze impact on performance.

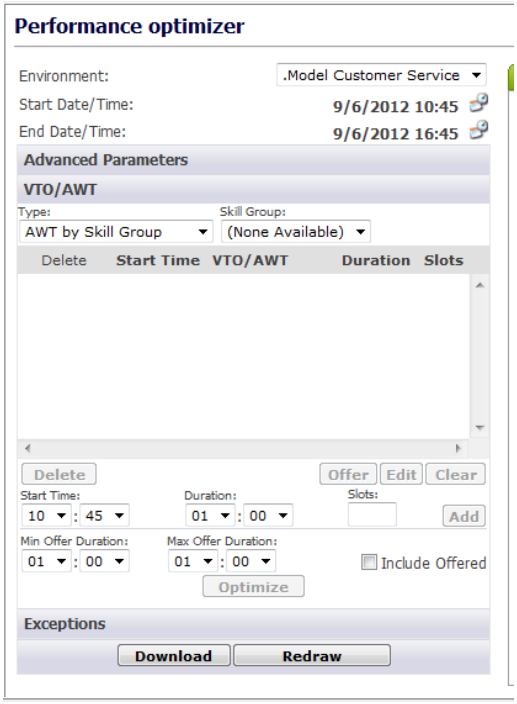


Figure 10.6 – VTO/AWT area

10.2.1.1. Exceptions

The Exceptions area shows agent exceptions already approved. They may be filtered by type and skill group for cancellation to analyze the impact of such a decision on the performance. To select Exceptions, the user should select a skill group from the *Skill Group* drop-down menu and an exception type on the *Exceptions Type* drop-down menu.

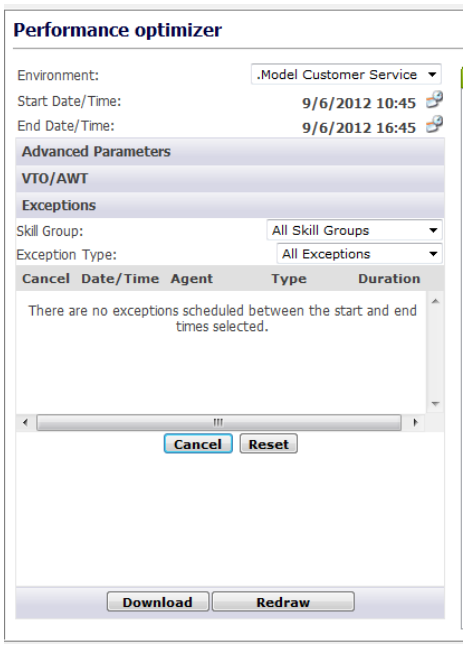


Figure 10.7 – Exceptions area

10.3. Performance Reports

The *Performance Reports* module allows the user to view performance and staffing in a weekly report format by intervals. This module is accessed by clicking on *Operations* then *Performance Reports* on the Menu as shown in Figure 10.8.

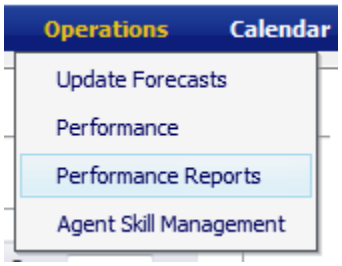


Figure 10.8

10.3.1. Performance tab

On the *Performance* tab the user can change environments, skill groups and contact groups. Data included in this report is Contact Volume, Handling Time, Service Level, The report can be downloaded in a weekly or tabular format as shown in Figure 10.9.

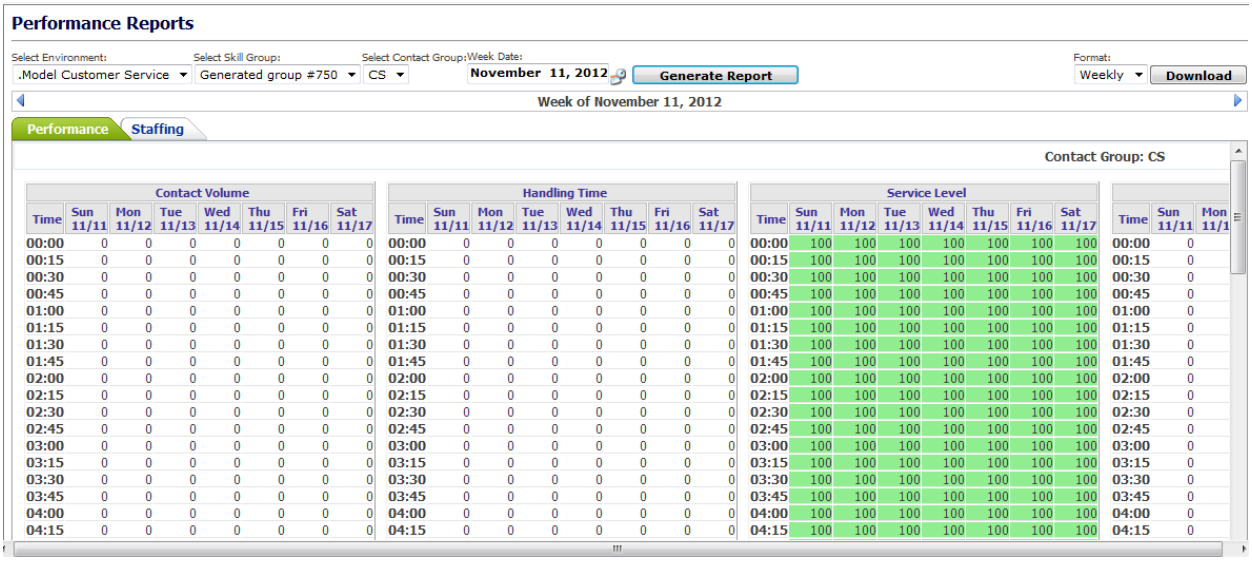


Figure 10.9

10.3.2. Staffing tab

On the *Staffing* tab the user can change environments, skill groups and contact groups. Data included in this report is Agents On Duty (AOD), Requred Staff, Over/Under and Occupancy Level. The report can be downloaded in a weekly or tabular format as shown in Figure 10.10.

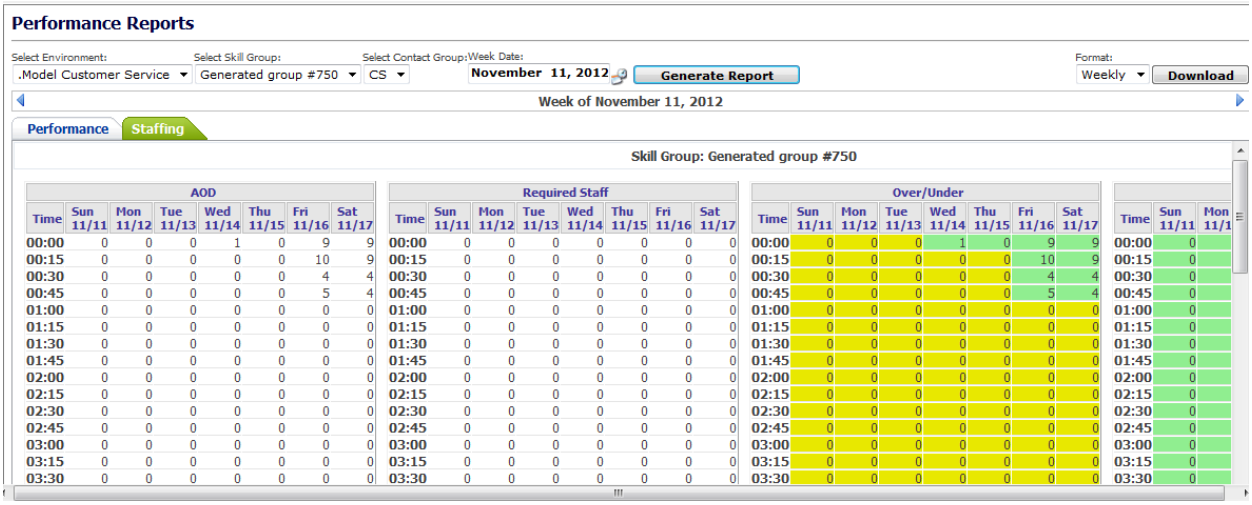


Figure 10.10

10.3. Agent Skill Management

The *Agent Skill Management* module is used to manage skill change requests for either a permanent change or for a temporary period of time. This module is accessed by clicking on the *Agent Skill Management* link on the *Operations* drop-down menu as shown in Figure 10.8.

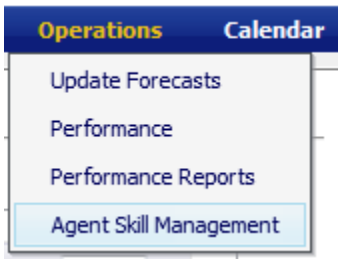


Figure 10.11

10.3.1. Manage Agent Skills Management Runs

The *Agent Skills Management* module as shown in Figure 10.12 provides lists of Administrator and site Managers, jobs submitted by them and their states. The User, Description, Number of Agents, Start Date, End Date, Status and Action are also displayed.

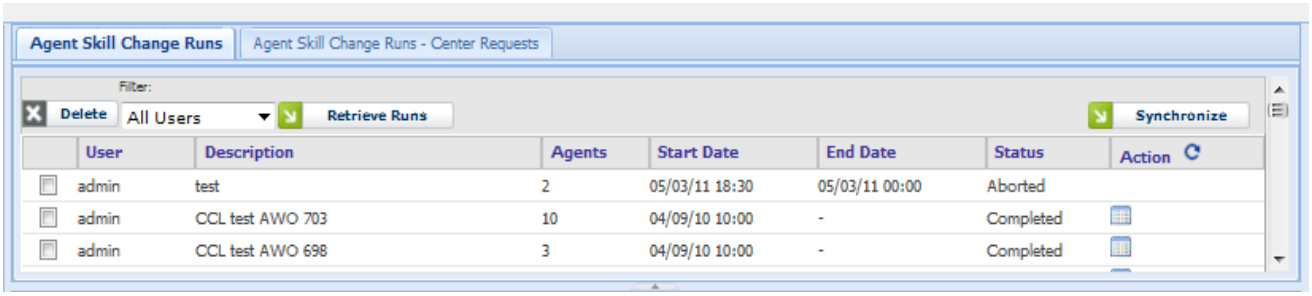


Figure 10.12 – Manage Agent Skills Management Runs

10.3.1.1. Agent Skill Change Runs

The *Agent Skill Change Runs* tab allows the user to view runs submitted by Administrators. This tab is available only to Administrators. The *Agent Skill Change Runs – Center Requests* tab is available to all users. This tab allows the user to view runs submitted by Site Managers. The *Filter* drop-down is available only in the *Agent Skills Change Runs* tab. It allows the user to filter the run list by User, Description, Start date or End Date. Clicking *Retrieve Runs* button will refresh the table, applying the filtering criteria. To refresh the run list with the latest data simply click on the *Refresh* icon ( ) in the header row of the Action column.

10.3.1.1.1. Status

One of several Status messages may be displayed in the Status column for each run as shown in Figure 10.13.

Status	Description
Awaiting Approval	The job has been submitted by a Site Manager and is awaiting approval by an Administrator.
Approved	The job has been approved by an Administrator.
Pending	The job has been submitted or approved by an Administrator. It is awaiting execution.
Active	This applies only to temporary changes. Temporary changes have been applied. These changes will be reversed at a future date and time set by an Administrator.
Completed	The job has been completed. Temporary changes have been reversed.
Aborted	Applies only to temporary changes. The changes will not be reversed. The scheduled reversal has been cancelled.
Rejected	Applies only to jobs submitted by Site Managers. The job has been rejected by an Administrator and will not be executed.
Error	An error occurred during execution. Contact your Administrator or check your parameters.

Figure 10.13 – Status Messages

10.3.1.1.2. Action

Several actions are available, which are dependent on the status of the run as shown in Figure 10.14.

Action	Description
View	Available if the job status is *Completed* or *Error*.
Edit	Available if the job status is *Pending* or *Awaiting Approval*.
Cancel	Available if the job status is *Pending* or *Awaiting Approval*.
Reject	Available if the job status is *Awaiting Approval*.
Approve	Available if the job status is *Awaiting Approval*.

Figure 10.14 - Action

10.3.1.1.3. Delete Agent Skills Change Run

You may delete one run at a time or multiple runs by checking the check boxes in the first column and then clicking the *Delete* button. You may not delete *Active* or *Aborting…* runs. *Approved* runs may be deleted only by Administrators.

10.3.1.2. Synchronize

The *Synchronize* button allows the user to submit a run that will discover discrepancies between data in the AWO Portal database and the ACD regarding agent skills/levels and agent call handling preferences. After the run has completed the user may choose to update either the AWO Portal database or the ACD. Only Administrators may submit synchronization runs.

10.3.2. Download

The *Download* button allows the user to download the data in the current tab in Microsoft Excel format.

10.3.3. Reports

The tabbed portion of the page below the *Download* button contains several lists. The tabs are described below. The Number of Agents Meeting Criteria count is displayed at the bottom of the tabbed portion of the page.

10.3.3.1. Agents Meeting Criteria

The *Agents Meeting Criteria* tab contains the list of agents meeting the search criteria specified either in the *Configuration* panel alone or in conjunction with those specified in the *Search Criteria* tab. The columns include Agent, ACD Login ID, Org Unit, Tour Group, Template, CHP (Call Handling Preference), Skill and Lvl (Skill Level). The user may select all agents in the list for a new run by marking the check box in the header row or by marking individual check boxes. The *Agents* field in the *Submit Request* tab will be updated to show the number of selected agents.

10.3.3.2. ACD Skill List

This tab contains the list of contact groups within each Environment. The columns include ACD Skill Name, Environment, Contact Group Name, ACD, and Active.

10.3.3.3. Agent Skills

This tab contains the list of agents and their skill group. The columns include Environment, Org unit, Agent, HR ID, and Skill Group. The Skill Group column includes sub-columns Permanent and Active.

10.3.3.4. Agent Skill Counts

This tab contains the count of agents by skill group. The columns include Environment, Skill Group – Permanent, Skill Group – Active, and Agent Count.

10.3.4. Add New Run

To add a new run the user may select the Environment, dates, agent availability in the Configuration panel, select the criteria, upload an agent list, and finally submit the run.

10.3.4.1. Configuration panel

The Configuration panel is used to select the desired agents to populate the Reports section.

10.3.4.1.1. Environment

This drop-down allows the user to filter agents for the run by environment. All agents within a run should belong to the same environment.

Note: when a user has only one environment assigned to him/her, that environment is automatically selected by default.

10.3.4.1.2. Eff. Start Date

This allows the user to schedule the date and time for the run. By default this is set to the next 5-minute interval. The Eff. Start Date must be in the future. Marking the check box will include the current value of Eff. Start Date in the *Selection Criteria* list and will be used for filtering agents. Otherwise, the current value of Eff. Start Date will be used in filtering.

10.3.4.1.2. Eff. End Date

This applies only to temporary changes. It allows the user to schedule the date and time for the changes to be reversed. Marking the check box will include the current value of Eff. Start Date in the *Selection Criteria* list and will be used for filtering agents. Otherwise, the current value of Eff. Start Date will be used in filtering.

10.3.4.1.3. Agent Availability

The available choices are *All*, *Active*, *Scheduled* and *Inactive*. This drop-down allows the user to filter agents based on their availability within the time interval described by Eff. Start Date and Eff. End Date (if any.)

10.3.4.1.4. No Breaks

Marking the check box will filter for agents who have no scheduled breaks within the specified time interval.

10.3.4.1.5. No Exceptions

Marking the check box will filter for agents who have no scheduled exceptions within the specified time interval.

10.3.4.1.6. Refresh

Click on the *Refresh* button to delete all entries in the *Selection Criteria* list and re-query the database using the selections in the *Configuration* panel.

10.3.4.1.7. Show All Skills

Marking the check box will cause all skills for an agent to be displayed in the *Agents Meeting Criteria* list. Otherwise, only skills specified in the *Selection Criteria* list will be displayed.

10.3.4.2. Search Criteria tab

10.3.4.2.1. Business Unit

This drop-down allows the user to filter agents by business unit. Multiple business units may be included in the filter. The available choices are determined by the selected Environment and are limited to Business Units for which the user is authorized. The selected business unit is added to the *Selection Criteria* list when the *'Plus'* icon to the right of the drop-down is clicked.

10.3.4.2.2. Org Unit

This drop-down allows the user to filter agents by organizational unit. Multiple organizational units may be included in the filter. The available choices are determined by the selected Environment and Business Unit and are limited to Organizational Units for which the user is authorized. The selected organizational unit is added to the *Selection Criteria* list when the *'Plus'* icon to the right of the drop-down is clicked.

10.3.4.2.3. Tour Group

This drop-down allows the user to filter agents by tour group. Multiple tour groups may be included in the filter. The selected tour group is added to the *Selection Criteria* list when the *'Plus'* icon to the right of the drop-down is clicked.

10.3.4.2.4. Shift Start

These entry fields allow the user to filter agents by scheduled shift start time. Leave the *Latest Start* field blank (the default) if only a single start time is desired. A single start time or range of start times may be included in the filter. The selected shift start time(s) are added to the *Selection Criteria* list when the adjacent *'Plus'* icon is clicked.

10.3.4.2.5. Skill Group

This drop-down allows the user to filter agents by either skill group or skill. Selecting *Skill Group* will cause the adjacent drop-down to be populated with skill groups associated with the selected Environment. Selecting *Skill* will cause the adjacent drop-down to be populated with skills associated with the selected Environment. A single skill group may be included in the filter. Multiple skills may be included in the filter. The selected skill or skill group is added to the *Selection Criteria* list when the adjacent *'Plus'* icon is clicked.

10.3.4.26. Call Handling

This drop-down allows the user to filter agents by call handling preference. The available choices are SL (Service Level without Service Objective), SLSO (Service Level with Service Objective), GN (Greatest Need without Service Objective) and GNSO (Greatest Need with Service Objective). Multiple call handling preferences may be included in the filter. The selected call handling preference is added to the *Selection Criteria* list when the adjacent *'Plus'* icon is clicked.

10.3.4.2.7. Selection Criteria

This contains the list of *Search Criteria* filters selected by the user. It also contains the *Eff. Start Date* and *Eff. End Date* selections from the Configuration panel if the associated check boxes have been marked. Click on the *Refresh* icon in the right corner of the header row of the *Search Criteria* area to re-query the database using these filters along with the selections in the *Configuration* panel.

10.3.4.3. Upload Lists tab

The user may select agents for a run from an uploaded file as shown in Figure 10.15. A template is also provided for populating and uploading an agent list.

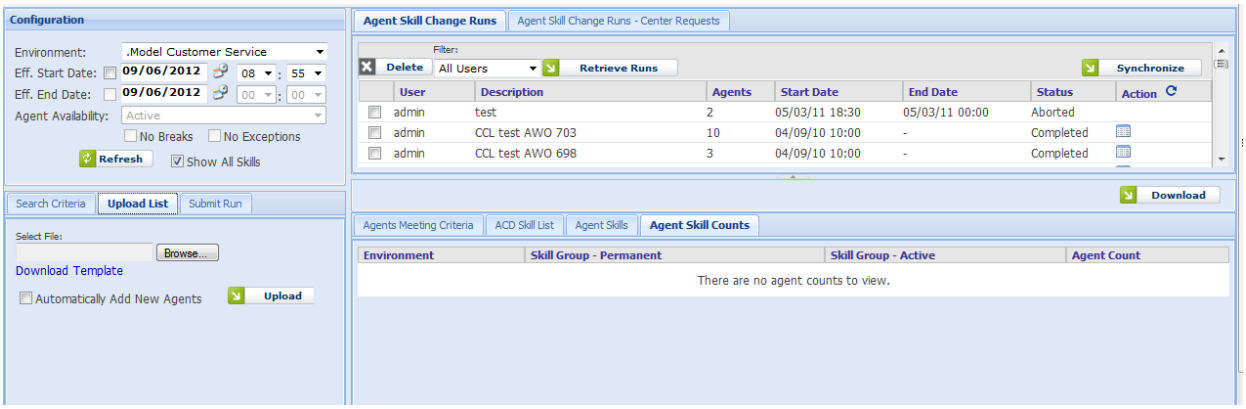


Figure 10.15 – Upload List

10.3.4.3.1. Select File

This allows the user to choose the file to upload.

10.3.4.3.2. Download Template

This link allows the user to download a template that displays the required file layout for the file to be uploaded.

10.3.4.3.3. Automatically Add New Agents

The user should mark this check box to add agents, from the uploaded file, that are not already in the AWO Portal database.

10.3.4.3.4. Upload

The user should click the *Upload* button to upload agents from the selected file.

10.3.4.4. Submit Request tab

Once all selections have been made the user may submit the run as shown in Figure 10.16.

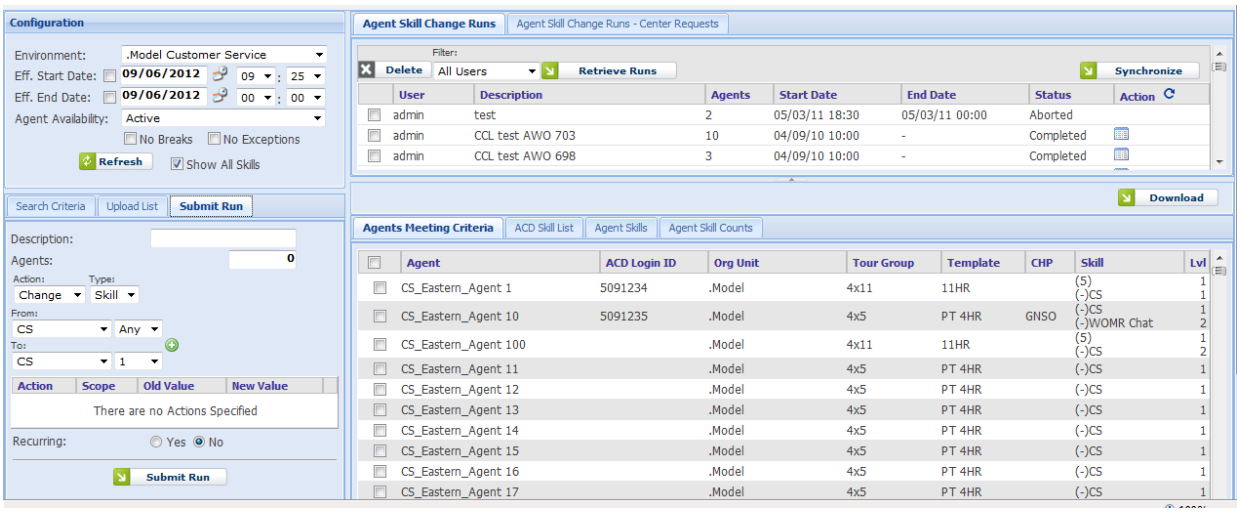


Figure 10.16 – Submit Run

10.3.4.4.1. Description

This text input field allows the user to enter a name for the run.

10.3.4.4.2. Agents

This text input field allows the user to specify a value for the number of agents to be included in the run. This value may not be less than the number of agents selected in the *Agents Meeting Criteria* tab. If this value is greater than the number of selected agents, the *Agent Skill Management* module will randomly choose additional agents for inclusion in the run.

10.3.4.4.3. Action

This drop-down allows the user to select the action to perform on the agents. The available choices are *Add*, *Change* and *Remove*.

10.3.6.4.4. Type

This drop-down allows the user to select the property that the selected Action should apply to. The available choices are *Skill* and *Call Handling Preference*.

10.3.4.4.5. From

This drop-down allows the user to select the initial value for a change request, or the value to be removed. If *Skill* is selected from the Type field this drop-down is populated with skill names. Otherwise it contains choices for Call Handling Preference. In the former case the adjacent drop-down allows the user to select the Skill Level. These drop-downs are disabled when action *Add* is selected. When action *Change* is applied to a skill only the skill level may be modified. To *Remove,* the user should click on the adjacent *'Plus'* icon to include this request.

10.3.4.4.6. To

This drop-down allows the user to select the new value for a change request, or the value to be added. If Skill is selected from the Type field this drop-down is populated with skill names. Otherwise it contains choices for Call Handling Preference. In the former case the adjacent drop-down allows the user to select the Skill Level. These drop-downs are disabled when action *Remove* is selected. When the *Change* action is applied to a skill only the skill level may be modified. For the *Add* or *Change action,* the user should click on the adjacent *'Plus'* icon to include this request.

10.3.4.4.7. Recurring

Marking *No* (default value) will create a run that executes one time only. Marking *Yes* will create a run that executes more than once. This option applies to temporary runs only. Two additional data entry fields will be displayed: *Every,* with the available choices of *Day*, *Week* and *Month,* specifying the frequency for the run, and *End Date* specifying the date on which the run will cease to execute.

10.3.4.4.8. Submit Request

The user should click on the *Submit Request* button to save the run. If the requested actions are incompatible with the configuration of any of the agents selected for the run, the user is presented with a dialog box with a list of those agents as shown in Figure 10.17. The *Reconfigure* button will dismiss the dialog. The user may also uncheck the invalid agents in the *Agents Meeting Criteria* tab. The *Cancel* button will dismiss the dialog and reload the page. The user may start over creating or managing runs.

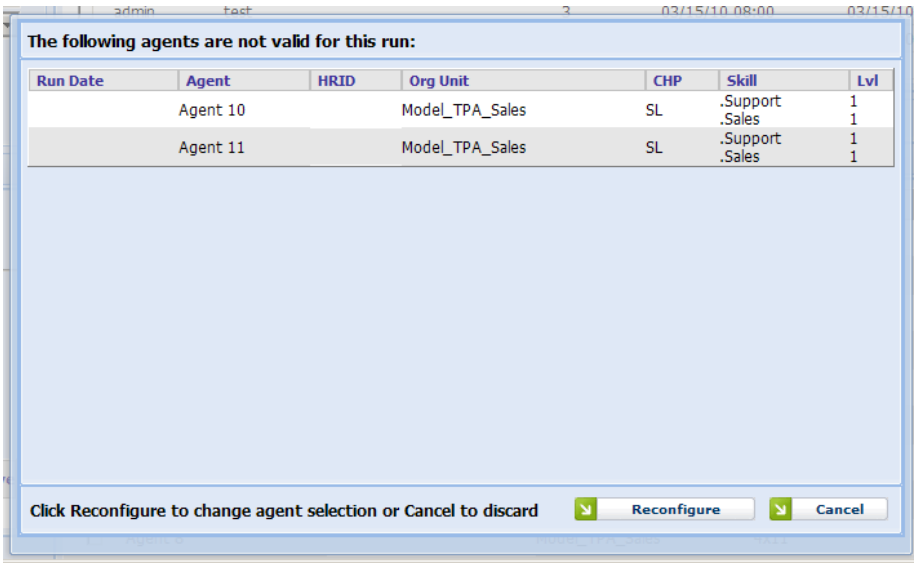


Figure 10.17 – Not Valid Agent List

10.3.5. View Run

When the *View* icon in the *Action* column of the Run Selection list is clicked, the *View Summary* popup window is displayed as shown in Figure 10.18. The Environment,
Agent Availability and number of Agents will be empty for synchronization runs.

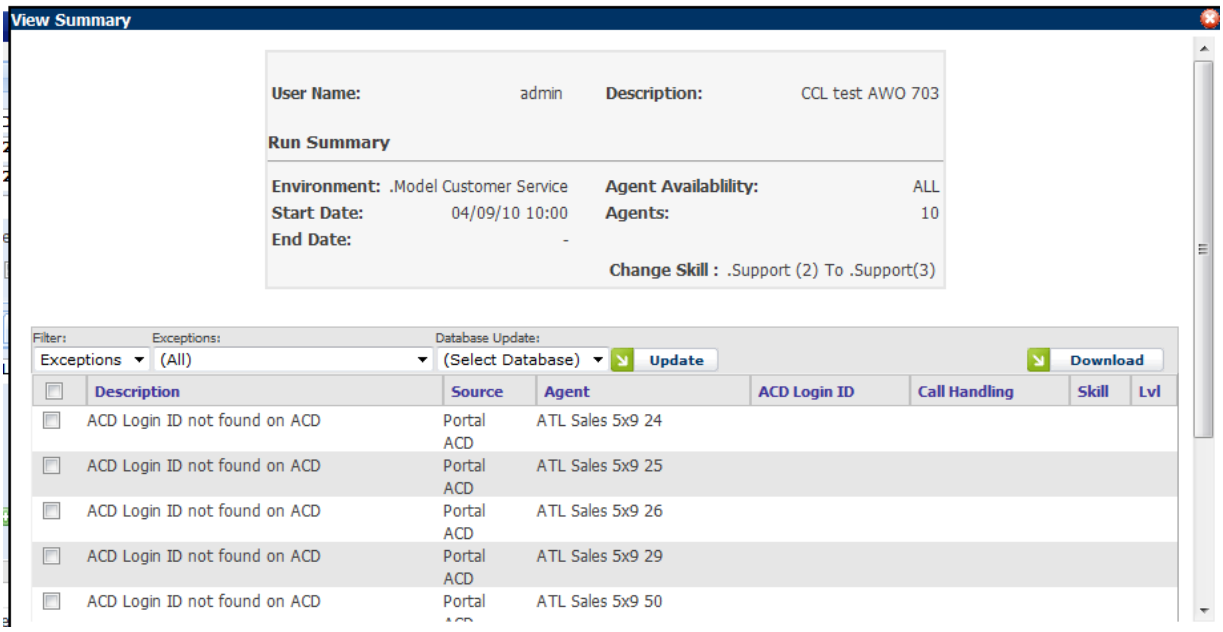


Figure 10.18 – View Summary

10.3.5.1. Synchronization Runs

10.3.5.1.1. Exceptions

This drop-down will contain a list of exception types. The list will be specific to those exception types that may arise during a synchronization run. The user may filter the exceptions by exception type.

10.3.5.1.2. Database Update

This drop-down will allow the user to choose whether to update the AWO Portal database or the ACD to resolve an exception. If the user chooses to update the ACD it will be made consistent with the values in the AWO Portal database and vice versa.

10.3.5.1.3. Update

The *Update* button will update the targeted database for the selected exceptions. These exceptions will be removed from the list.

10.3.5.1.4. Download

The *Download* button allows the user to download the exceptions data in Microsoft Excel format.

10.3.5.1.5. Exceptions List

This list will contain all discrepancies found during the run. The columns include Description, Source, Agent, HR/Login ID, Call Handling, Skill, and Lvl. For each column except the first, the list will display the value found in the AWO Portal database above the value found in the ACD.

10.3.5.2. Non-Synchronization Runs

10.3.5.2.1. Filter

This drop-down will allow the user to display either Agents or Exceptions

10.3.5.2.2. Agents

If *Agents* is selected from the *Filter* drop-down, the agents selected for this run will be displayed.

10.3.5.2.3. Exceptions

This drop-down will contain a list of exception types. The list will be specific to those exception types that may arise during a non-synchronization (regular) run. The user may filter the exceptions by exception type. This drop-down will be displayed only when *Exceptions* is selected from the *Filter* drop-down.

10.3.5.2.4. Database Update

This drop-down will allow the user to choose whether to update the AWO Portal database or the ACD. If the user chooses to update the ACD it will be made consistent with the values in the AWO Portal database and vice versa. This drop-down will be displayed only when *Exceptions* is selected from the *Filter* drop-down.

10.3.5.2.5. Update

The *Update* button will update the targeted database for the selected exceptions. This button will be displayed only when *Exceptions* is selected from the *Filter* drop-down. The selected exceptions will be removed from the list.

10.3.5.2.6. Download

The *Download* button allows the user to download the data in Microsoft Excel format. The Excel workbook will contain separate worksheets for Agents and Exceptions.

10.3.5.2.7. Exceptions List

This list will contain all discrepancies found during the run. The columns include Description, Source, Agent, HR/Login ID, Call Handling, Skill, and Lvl. For each column except the first, the list will display the value found in the AWO Portal database above the value found in the ACD.

10.3.5.2.8. Agents List

If *Agents* is selected from the *Filter* drop-down, the agents selected for this run will be displayed. The columns include Agent, HR ID, Organizational Unit, Tour Group, Template, Call Handling, Skill and Lvl.

11. Calendar

The *Calendar* provides a central location for viewing and managing the work schedules and activities.

11.1. My Calendar

The *My Calendar* page is accessed by clicking the *My Calendar* link on the *Calendar* drop-down menu as shown in Figure 11.1. The *My Calendar* page is accessible to all users.

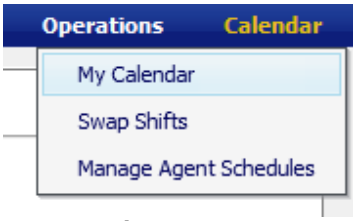


Figure 11.1

The page is designed similar to popular calendar applications as shown in Figure 11.2. This page shows an agent's planned schedule, actual work times, adherence daily, and weekly schedule summary. The planned schedule and break times are shown in white and green while the actual times worked are shown in light and dark gray colors.

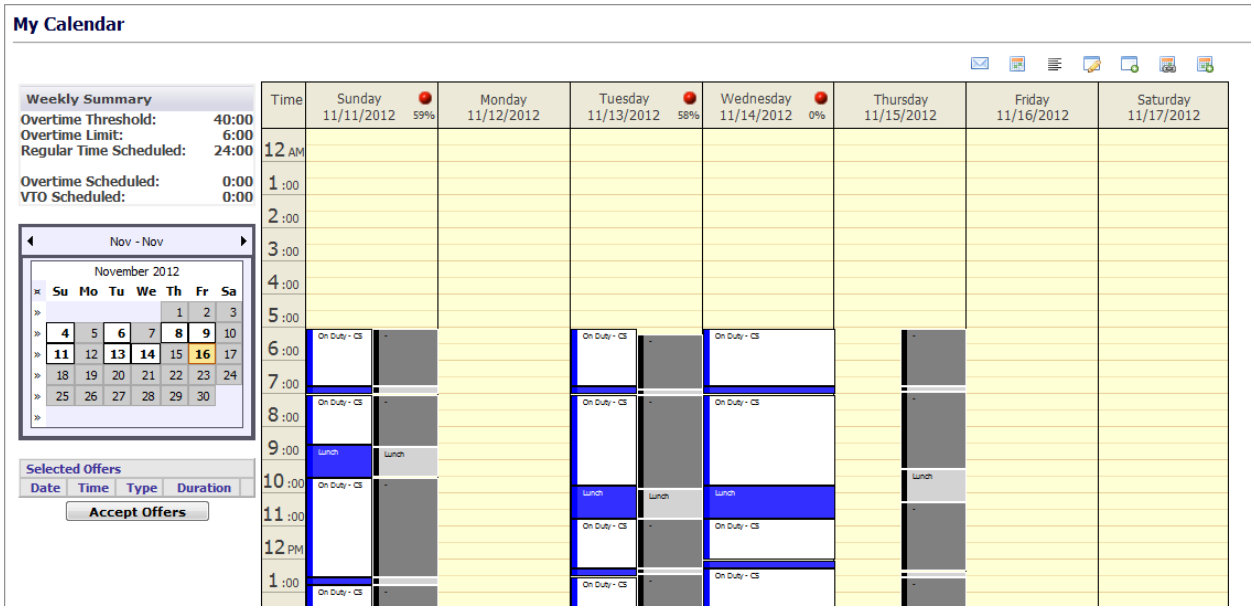


Figure 11.2 – My Calendar

The icons in the *My Calendar* page, as shown in Figure 11.3, are used to access various features provided by the this page. Features provided by these icons are described below.

Email	**View Calendar**	**View Schedule**	**View Exceptions**	**Enter Exceptions**	**Swap / Decline Shifts**	**Offered Shifts**

Figure 11.3 – Calendar Icons

11.1.1. Weekly Summary

The *Weekly Summary* area provides a method for viewing a specific week as shown in Figure 11.4. This area shows work and off day status on any given day. To advance the calendar to the next monthly, the user should click on the directional arrows at the top. To view a specific week in the calendar, the user should click on the double arrows to the left of the week.

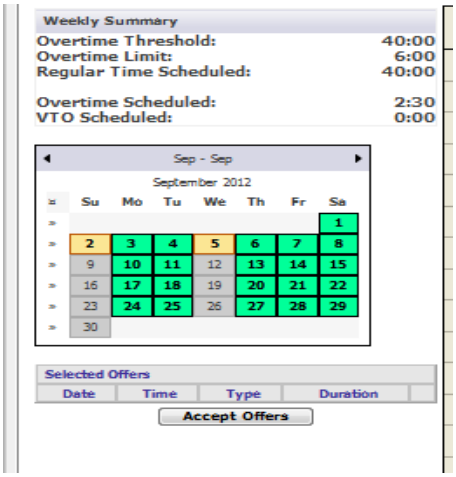


Figure 11.4 – Weekly Summary

11.1.2. Calendar View

Selecting a week by clicking on the double arrow >> icon in the Weekly Summary section will display the selected week in the Calendar view as shown in Figure 11.5. Each day of that week is represented in a column, headed by the day of week and date. Rows, divided visually into 30 minute intervals, fill the height of the user's web browser. The *My Calendar* page displays events during the day with colored time blocks. Hovering the mouse over the individual events will change the event color (to indicate selection), and display a small text box with the start and end times for that event.

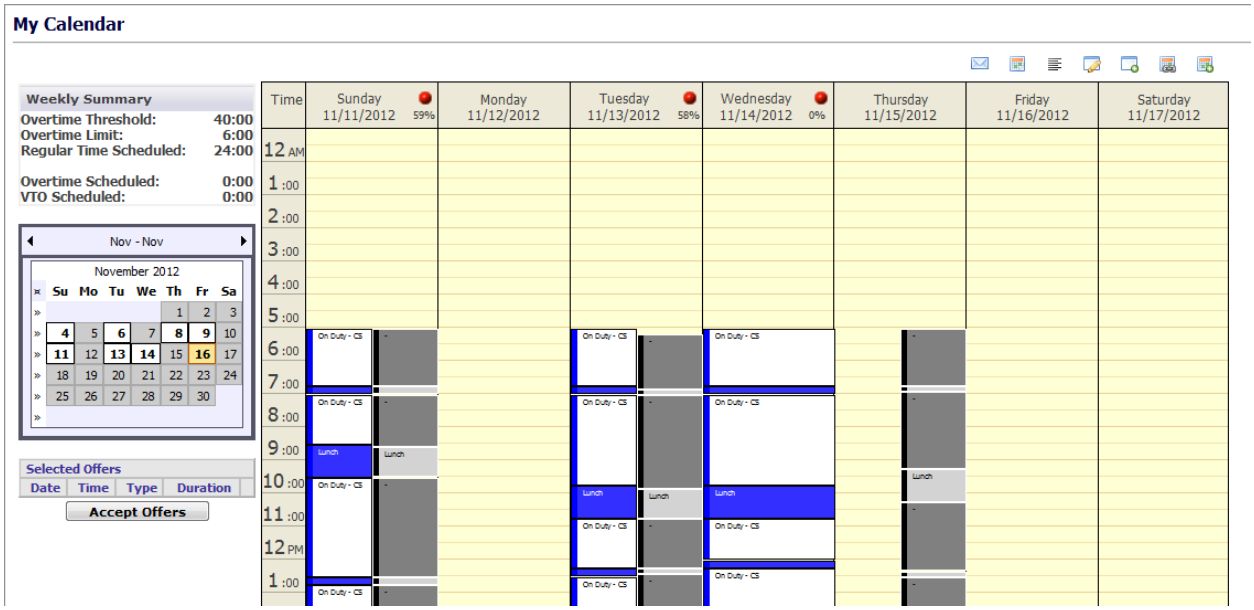


Figure 11.5 – Calendar View

11.1.3. View Schedule

Clicking on the *View Schedule* icon will display the text view of schedules as shown in Figure 11.6. Each day of the week is represented in a block, headed by the day of week and date. The specific times are located in the left column, while the status for that period of time is in the right column of the corresponding row. The user can click on the *View Calendar* icon to return to the Calendar view.

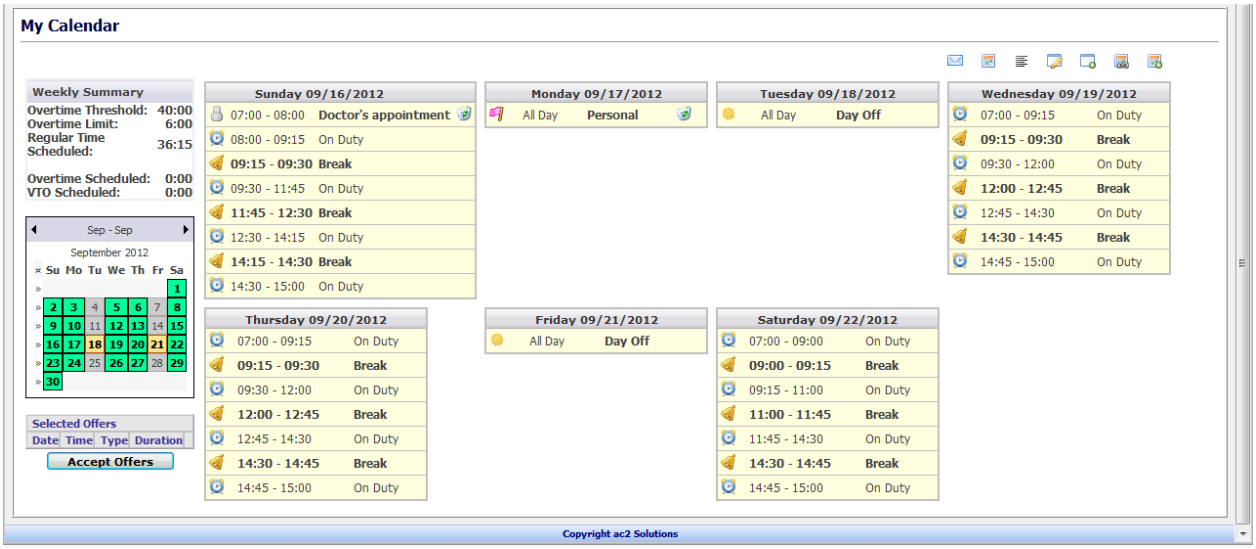


Figure 11.6 – Schedule View

11.1.4. Email

This function allows the users to send their schedules via email to others. After selecting the week to be sent, click on the *Email* icon to open the Email Schedule box as shown in Figure 11.7. Enter the email address and click on the *Send* button.

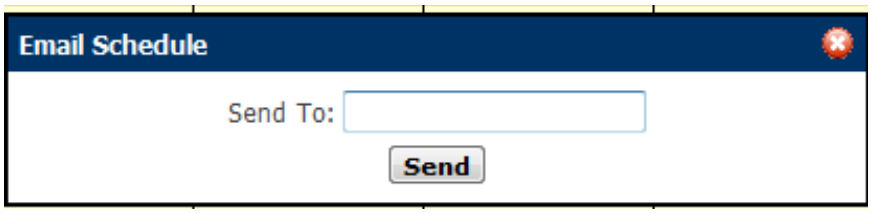


Figure 11.7

11.1.5. Enter Exceptions

This function allows the user to enter their requests (exceptions) for time for specific activities or time off. An agent should click on the Enter *Exceptions* icon to open the Enter Exceptions box as shown in Figure 11.8. The agent is first required to select an exception type from the *Exception* drop-down menu to enter their requests. Depending on the configuration in the AWO Portal, requests for an exception type may be auto-approved or wait listed (also known as pending exceptions) for approval by an Administrator. The agent is also required to enter a start time and duration for the request. Exceptions may only be entered during scheduled shifts. The user should click on the *Submit* button once the selections are completed. To close without exception entry, the user should click on the *Cancel* button.

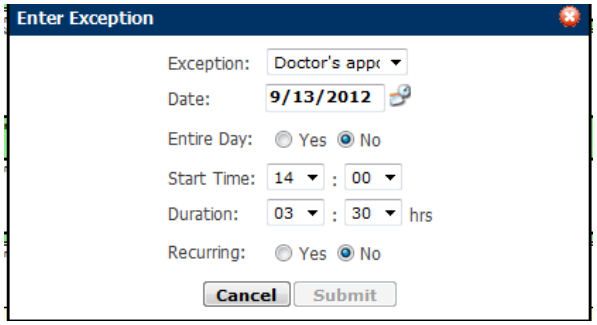


Figure 11.8 – Enter Exception

View Exceptions

This function allows the user to view their exceptions for the selected week as shown in Figure 11.9. The user can delete already approved and pending exceptions from this page. Click on the *View Calendar* icon to return to the calendar.

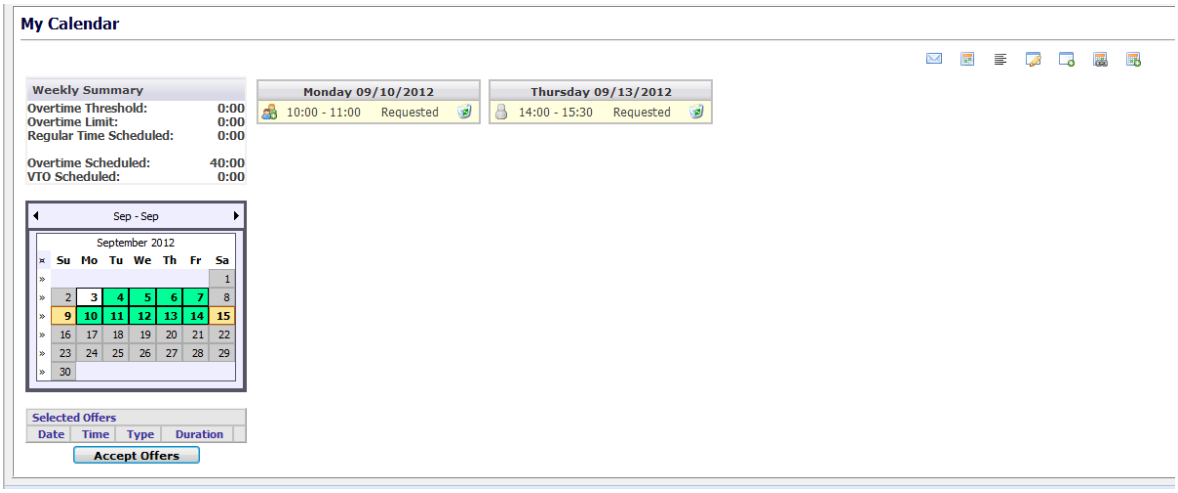


Figure 11.9 - View Exceptions

11.1.7. Swap Shifts

This function is used to enter swap requests. The user should click on the *Swap Shifts* icon to open the Swap Shifts box as shown in Figure 11.10. Click on the *Request Shift Swap* button to submit the swap. Swaps can be viewed by selecting Calendar-Swap Shifts-My Swap Requests tab described in section 11.2.3. To cancel the swap request without saving, click on the red x.

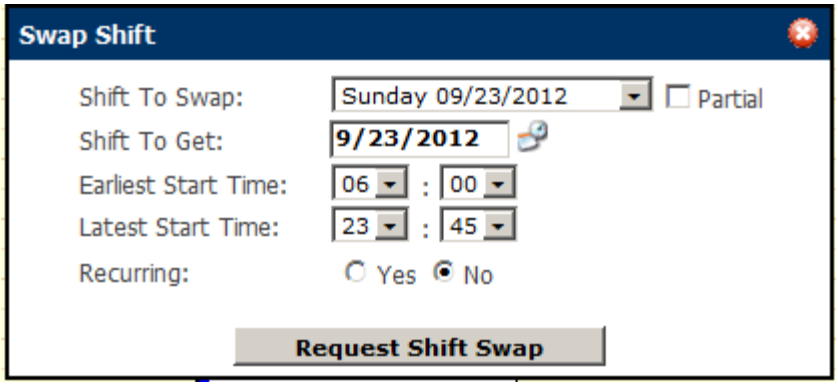


Figure 11.10 – Swap Shift

11.2. Swap Shifts

The *Swap Shifts* module allows the user to manage their shift swaps. This module is accessed by clicking on the *Swap Shifts* on the *Calendar* drop-down menu as shown in Figure 11.11.

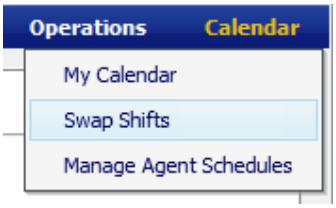


Figure 11.11

11.2.1. Swap Requests

The *Swap Requests* tab allows the user to view possible swaps entered via the *Swap Shifts* icon on the *My Calendar* page as shown in Figure 11.12. By clicking on the *Swap* icon in the Action column of the desired swap, the user can propose one his/her shifts to the other agent for acceptance.

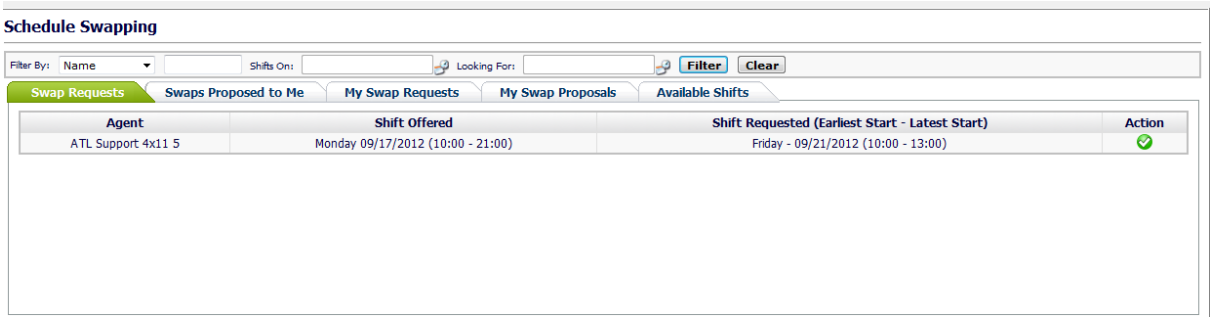


Figure 11.12 – Swap Requests

11.2.2. Swap Proposed to Me

The *Swap Proposed to Me* tab allows the user to accept or reject the proposed swaps as shown in Figure 11.13. To accept a swap, the agent should click on the *Accept Proposal* icon; to reject a swap, the agent should click on the *Reject Proposal* icon in the Action column.

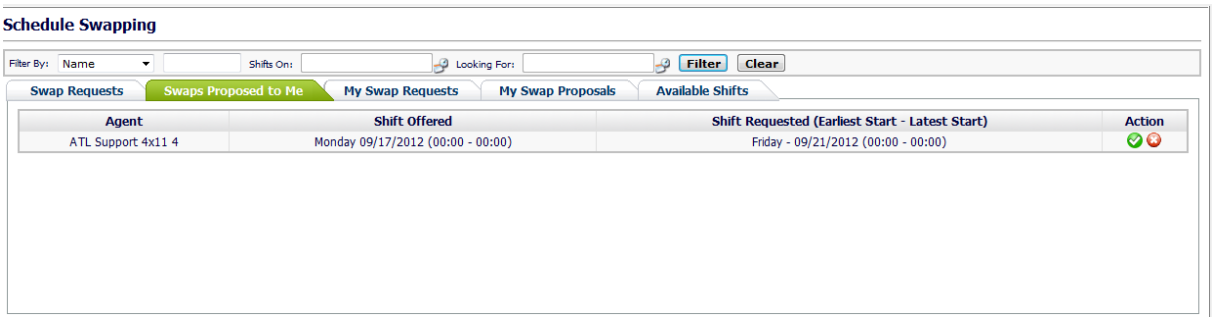


Figure 11.13 – Swaps Proposed to Me

11.2.3. My Swap Requests

The *My Swap Requests* tab allows the user to view all of his/her pending swap requests as shown in Figure 11.14. The agent may cancel a pending request from this page.

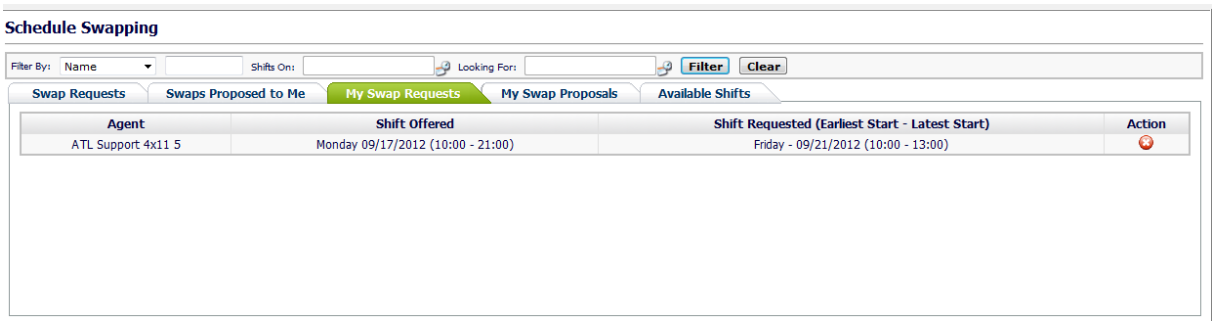


Figure 11.14 – My Swap Requests

11.2.4. My Swap Proposals

The *My Swap Proposals* tab allows the user to view their swap proposals and to cancel them if they have not yet been accepted, as shown in Figure 11.15. To cancel a swap proposal, click on the *Cancel Proposal* icon in the Action column.

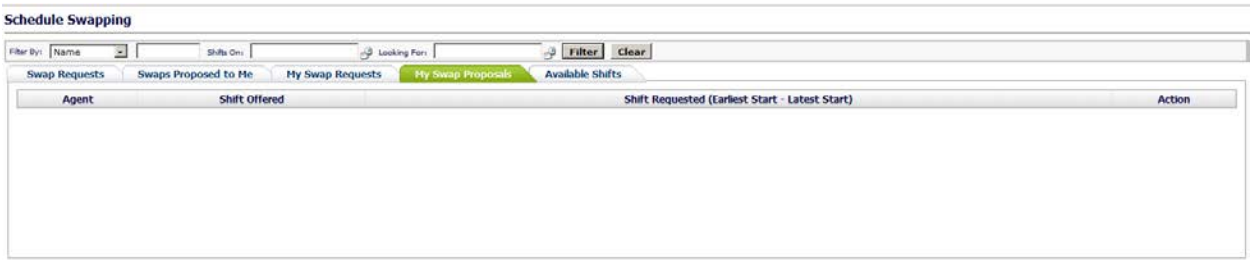


Figure 11.15 – My Swap Proposals

11.2.5. Available Shifts

This function is used to show Offered Shifts. These are shifts dropped by agents due to day off (sick, personal, etc.) as shown in Figure 11.16.

Figure 11.16 – My Swap Proposals

11.3. Manage Agent Schedules

From the *Manage Agent Schedules* page, a user can send emails, download schedules, copy/edit/delete/add schedules, view/cancel exceptions, approve or reject pending exceptions, add new exceptions, and add work time, as shown in Figure 11.18. The *Manage Agent Schedules* module is accessible to Managers and Administrators only. This module is accessed by clicking on the *Manage Agent Schedules* link on the *Calendar* drop-down menu as shown in Figure 11.17.

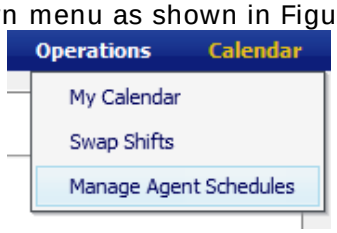


Figure 11.17

In the *Manage Agent Schedules* page, Work days are marked by a *W* icon and off days are left blank. If a shift is already completed, the color of the *W* icon changes to gray. The color of currently worked or future shifts is blue as shown in Figure 11.18.

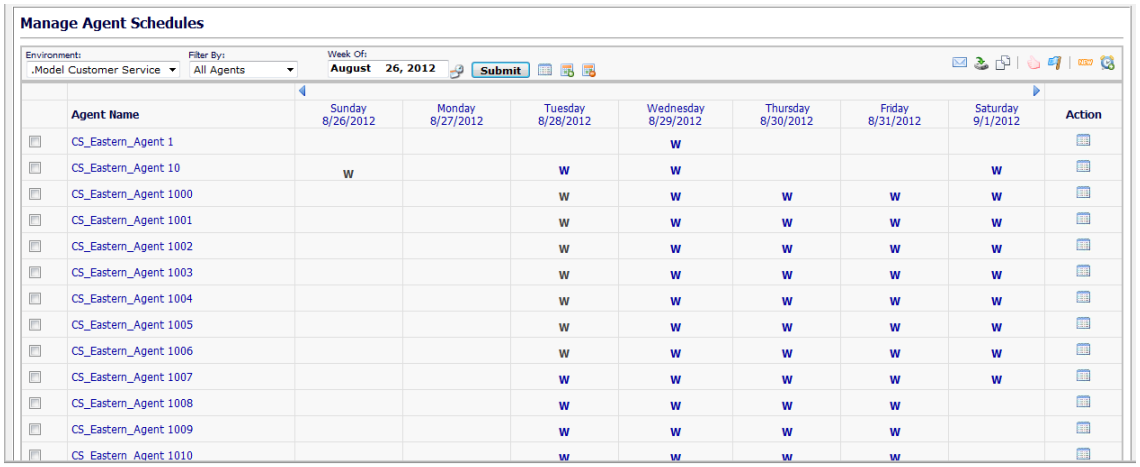


Figure 11.18 – Manage Agent Schedules

11.3.1. **Manage Agent Schedules Page**

The *Manage Agent Schedules* page provides a number of features for viewing weekly schedules and managing schedule changes. The user may filter agents by selecting choices from the *Environment* and *Filter By* drop-down menus, *Week Of* calendar control, and clicking on the *Submit* button. The *Manage Agent Schedules* page will display agents who are working in the week selected based on the configuration

provided by the user. Agents may also be filtered based on work status according to the configuration selected by clicking on the *All*, *Working* or *Non-working* agent icons next to the *Submit* button. Clicking the View icon with a green "+" will display the agents who have a schedule, clicking the icon with red "-" will display agents who do not have a schedule, and clicking the icon without a "+" or "-" sign will display all agents for the week selected.

An agent's schedule details may be viewed in two different ways. The user may click the *View* icon in the same row with the agent's name in the Action column to display the details of an agent's schedule in the week selected. Alternatively, the user may click on the agent's name to go to the agent's *My Calendar* page to reach the page as shown in Figure 11.5.

11.3.2. **Edit Schedules**

To edit schedules from the *Manage Agent Schedules* page, the user should click on the *W* icon on the date to be edited. The Edit Shift box is displayed as shown in Figure 11.19. The user can change the shift duration, start time, shift template name, and break times and duration. When the changes are configured, the user should click to save the edited shift.

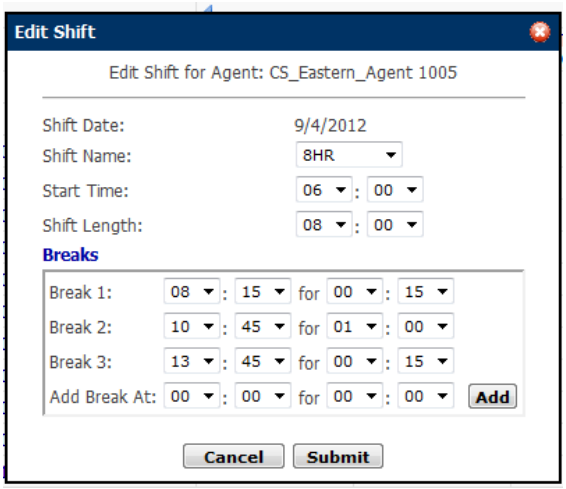


Figure 11.19 – Edit Shift

Note: All shift times entered through the Edit Shift box should be in the local time zone of the agent.

11.3.3. **Delete Schedules**

To delete a schedule for a day, the user should click in the Gray area in the day cell with the "W" and click on the *Delete* link displayed. The *Delete* link is displayed only when the Gray area is clicked on.

11.3.4. **Add Schedules**

To add a schedule from the *Manage Agent Schedules* page, the user should click in a non-work day cell and then click on the *Add* link displayed. The *Add* link is displayed only when the Gray area is clicked on. The Add Shift box is displayed as shown in Figure 11.20.

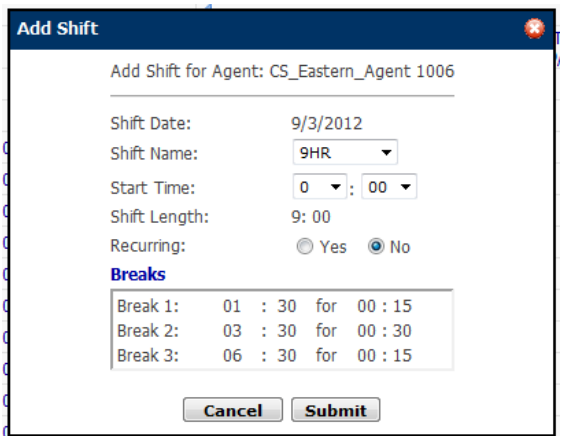


Figure 11.20 – Add Shift

Note: All times entered through the Add Shift box should be in the local time zone of the agent.

11.3.5. Send Message

The user can send an email message from the *Manage Agent Schedules* page by checking the box to the left of the agent name(s) to whom a message is to be sent. The user should click on the *Send Message* icon to access the Send Email box as shown in Figure 11.22., enter the Subject and Message to be sent, and select to send either via Email, or Agent Homepage, and then click on the *Send* button. To cancel the email request, simply click on the *Cancel* button.

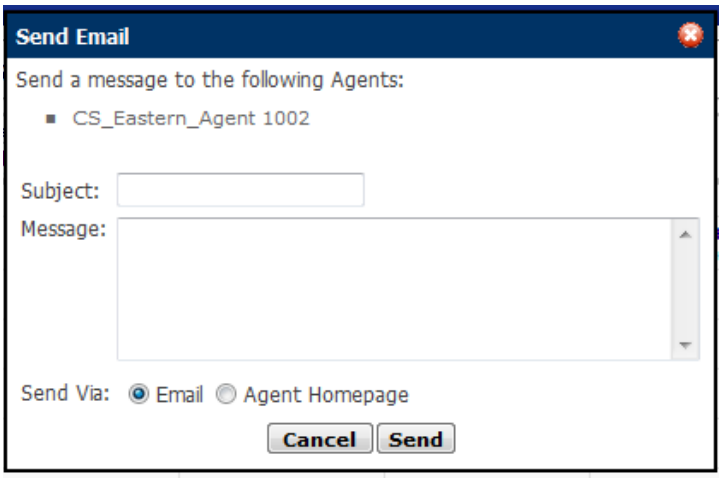


Figure 11.22 – Send Email

11.3.6. Download Schedules

From the *Manage Agent Schedules* page, the user can click on the *Download Schedules* icon to download agent schedule details. Upon downloading, the option to open or save the file will be displayed. All agent schedules for the selected Environment will be downloaded in a csv file format.

11.3.7. Copy Schedules

From the *Manage Agent Schedules* page, the user can click on the *Copy Schedules* icon to copy agent schedules from one period to another. The Copy Agent Schedules box will be displayed as shown in Figure 11.23. The user should enter a Start and End date to specify a period to copy existing schedules from.

Next, the user should select the group of agents whose schedules are to be copied by selecting an Environment, Business Unit, Organizational Unit or Name and click on the *Filter* button. To select all the names on the list, the user should check the box next to Name on the header row or check individual names by clicking on the box to the left of each name. Finally, the user should enter a Start and End date to specify the period over which the schedules are to be copied and click on the *Submit* button. Click the *Cancel* button to close.

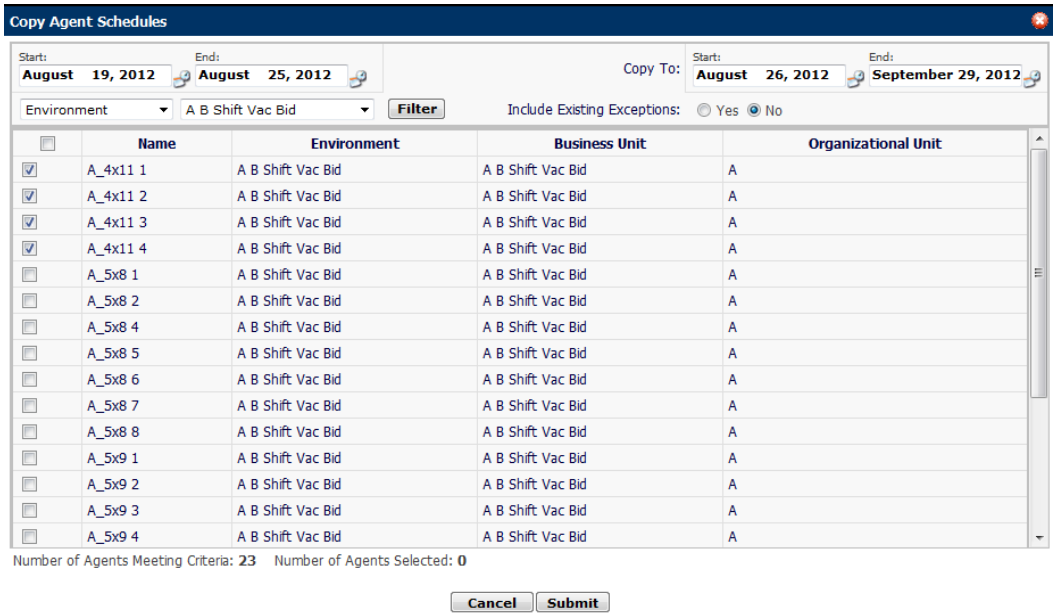


Figure 11.23 – Copy Agent Schedules

11.3.8. Exception Requests

The user should click on the *Exception Requests* icon from the *Manage Agent Schedules* page to view Pending and Approved exceptions. The user can filter exceptions by Environment, by Contact Group or Skill Group, and by exception status. Exception requests pending can be filtered by selecting Pending on the *Exception Status* drop-down menu as shown in Figure 11.24. The user may choose to approve or reject either all filtered exceptions by clicking on the check box next to the Agent column header or select names by clicking on the check boxes to the left of agent names, then select Approve or Reject on the *Action* drop-down menu, and finally click on the *Apply* button. A message will automatically be sent to the agents selected via email, SMS and to their Homepage.

Figure 11.24 – Exception Requests

The user can filter exceptions already approved by selecting Approved on the *Exception Status* drop-down menu. All or some of the exceptions approved can be cancelled by clicking on the check box next to the Agent column header or select names by clicking on the check boxes to the left of agent names, select Cancel on the *Action* drop-down menu, and click on the *Apply* button.

11.3.9. Add New Exception

The user can schedule exceptions for agents from the *Manage Agent Schedules* page by selecting agents for which the exceptions are to be scheduled by clicking on the check box to the left of the Agent Names and clicking on the *Add New Exception* icon. Clicking the icon will display the *Enter Exception* box. The user should select the Exception, Date, Yes or No for Entire Day, Start Time, Duration and then click on the *Submit* button as shown in Figure 11.25 to enter one-time exceptions. If the exception will be recurring, the user should click on Yes for Recurring selection, and then select Daily, Weekly or Monthly recurrence, enter the date it will end, and then click on the *Submit* button.

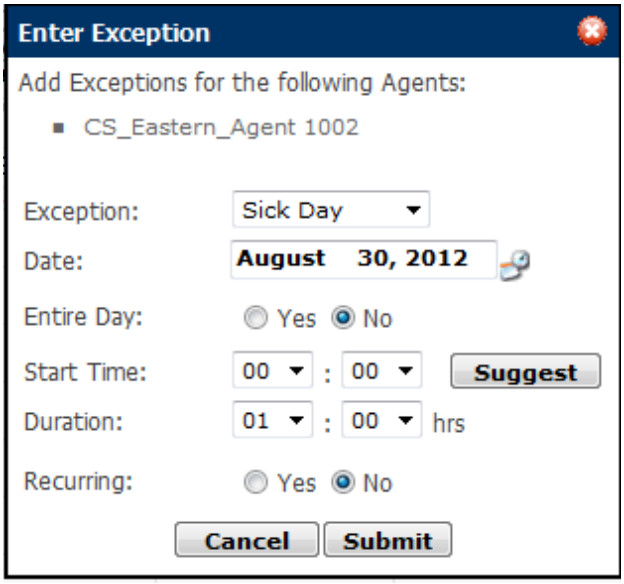


Figure 11.25 – Add New Exception

If two or more agents are selected for the same Exception (e.g. meeting), the user can query the times it can be scheduled for all by selecting the Exception, Date, Yes or No for Entire Day, Start Time, Duration and clicking the *Suggest* button. A time slot from the ones displayed should be selected to schedule the Exception.

Note: All Exception times should be entered in the databse time zone. If if an agent is not working during the Exception configured, the exception cannot be scheduled.

11.3.10. Add Work Time

The user can schedule additional work time for agents from the *Manage Agent Schedules* page by selecting agents for which additional work time is to be scheduled by clicking on the check box to the left of the Agent Names and clicking on the *Add Work Time* icon as shown in Figure 11.26. Clicking the icon will display the *Add Work Time* box. Select either Before Shift, After Shift or Specific Time, the date and duration for the additional work time to be added, and click on the *Submit* button. The user can also schedule breaks to be taken during additional work time added by clicking on the *Breaks* link and entering break durations and break start times.

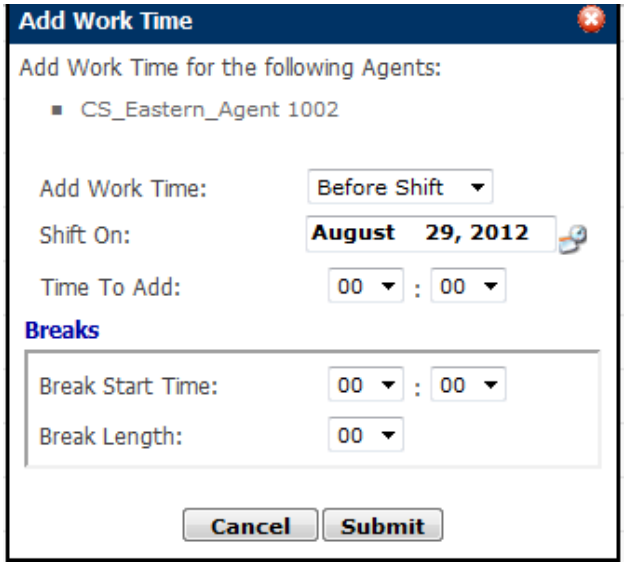


Figure 11.26 – Add Work Time

Note: All Work Times should be entered in the database time zone. If if an agent is already scheduled for work during the Work Times configured, the exception cannot be scheduled.

11.3.11. Daily Schedule View

The user can view the daily schedules by clicking the *Day/Date* link at the top of a day of week in the *Manage Agent Schedules* page. Schedules for agents working on the day selected will be displayed as shown in Figure 11.27. The functionality available in the *Manage Agent Schedules* page and described in sections 11.3.2 to 11.3.10 are also available in the *Daily Schedule View* page. Please refer to the appropriate section above for more information.

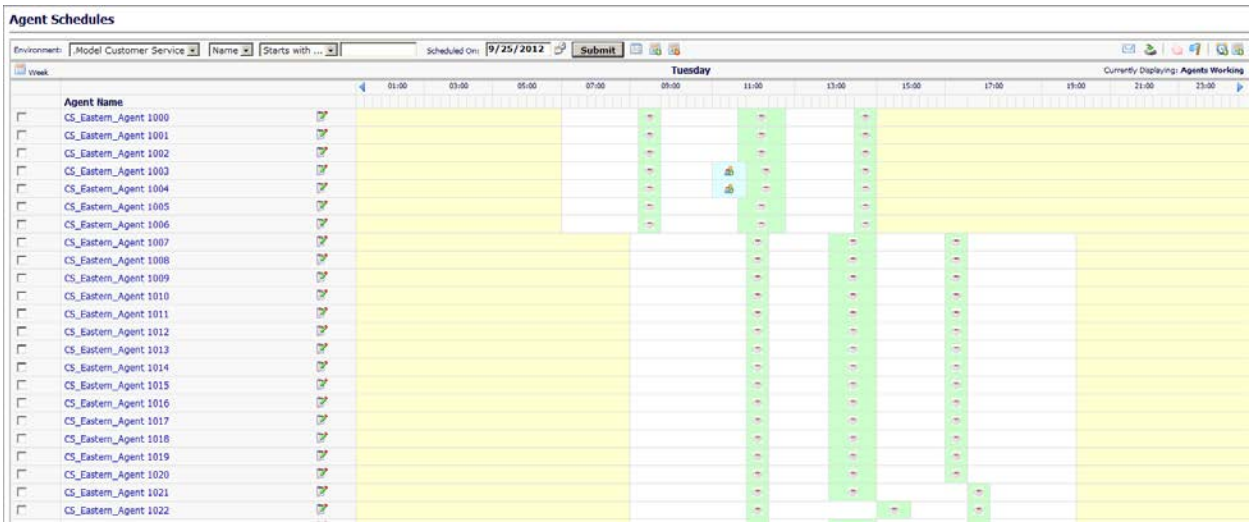


Figure 11.27 – Daily Schedule View

WFM v2 Agent Workstation Administrator Web Site User Manual