

# **inContact Workforce Management v2**

## **Portal Administrator Web Site User Manual**

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[www.incontact.com](http://www.incontact.com)

# inContact WFM v2 Portal Administrator Web Site User Manual

- **Version** — 16.1
- **Revision** — March 2016
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## Table of Contents

1. Overview.....	9
1.1. Browser Requirements.....	9
2. Home Page Features.....	10
2.1. Login.....	10
2.2. Discussions.....	11
2.3. Announcements.....	13
2.4. Contacts for Information.....	14
2.5. Links.....	15
2.6. Events.....	15
2.7. Change Password.....	15
2.8. Logout.....	16
3. Workforce.....	17
3.1. Skill Levels.....	17
3.1.1. Add New Skill Levels.....	17
3.1.2. Edit Skill Levels.....	17
3.1.3. Delete Skill Levels.....	17
3.2. Skill Groups.....	18
3.2.1. Add New Skill Group.....	18
3.2.2. Automatic Identification of Skill Groups.....	18
3.2.3. Edit Skill Group.....	18
3.2.4. Delete Skill Groups.....	19
3.3. Team Leads.....	19
3.3.1. Add Team Lead.....	19
3.3.2. Edit Team Lead.....	19
3.3.3. Delete Team Lead.....	19
3.4. Agents.....	20
3.4.1. Manage Agents.....	20
3.4.2. Add New Agent.....	20
3.4.3. Edit Agent.....	21
3.4.3.1. Edit Agent Summary.....	21
3.4.3.2. Agent Configuration.....	22
3.4.3.3. Agent Skill Assignments.....	22
3.4.3.4. Agent Availability.....	23
3.4.3.5. Agent Preferences.....	23
3.4.4. Delete Agent.....	24
3.4.5. Agent Licenses.....	24

3.5. Multiple Agents .....	24
3.5.1. Manage Multiple Agents .....	24
3.5.2. Add Multiple Agents.....	25
3.5.3. Edit Multiple Agents.....	26
3.5.4. Delete Multiple Agents .....	26
3.6. Agent Attributes .....	26
3.6.1. Add New Attribute .....	27
3.6.2. Edit New Attribute .....	27
3.6.3. Delete New Attribute .....	27
3.7. Agent Query .....	27
3.8. Agent Daily Availabilities .....	29
3.9. Import Agents.....	29
3.10. Import Skills .....	30
4. Contact Centers .....	31
4.1. ACDs .....	31
4.1.1. Manage ACD Profiles.....	31
4.1.2. Add New ACD Profile.....	31
4.1.3. Edit ACD Profile.....	32
4.1.3.1. Make .....	32
4.1.3.2. Update Interval .....	32
4.1.3.3. Maximum Inbound Contacts.....	32
4.1.3.4. Time Zone .....	33
4.1.3.5. Agent Selection Option .....	33
4.1.3.6. Call Selection Option .....	33
4.1.3.7. ACD IP Address .....	33
4.1.3.8. Agent IP Address .....	33
4.1.3.9. Advanced Settings .....	33
4.1.3.9.1. Queue Name .....	34
4.1.3.9.2. Queue ID .....	34
4.1.3.9.3. Skill ID .....	34
4.1.4. Delete ACD Profile .....	34
4.2. Environments .....	34
4.2.1. Manage Environments.....	34
4.2.2. Add New Environment .....	34
4.2.3. Edit Environment .....	35
4.2.4. Delete Environment .....	35
4.3. Business Units .....	35
4.3.1. Manage Business Units.....	35
4.3.2. Add New Business Unit .....	35

4.3.3. Edit Business Unit .....	36
4.3.4. Delete Business Unit.....	36
4.4. Organizational Units .....	36
4.4.1. Manage Organizational Units.....	36
4.4.2. Add New Organizational Unit .....	37
4.4.3. Edit Organizational Unit .....	37
4.4.4. Delete Organizational Unit .....	38
4.5. Contact Groups .....	38
4.5.1. Manage Contact Groups .....	38
4.5.2. Add New Contact Group.....	39
4.5.3. Edit Contact Group .....	40
4.5.4. Delete Contact Group .....	40
4.6. Streams .....	40
4.6.1. Manage Streams .....	40
4.6.2. Add New Stream .....	40
4.6.3. Edit Stream .....	41
4.6.4. Delete Stream .....	42
4.7. Stream Profiles .....	42
4.7.1. Manage Stream Profiles .....	42
4.7.2. Add New Stream Profile .....	42
4.7.3. Edit Stream Profile .....	43
4.7.4. Delete Stream Profile.....	43
5. Tour Groups.....	44
5.1. Tour Groups .....	44
5.1.1. Manage Tour Groups .....	44
5.1.2. Add New Tour Group .....	44
5.1.3. Edit Tour Group .....	44
5.1.4. Delete Tour Group.....	45
5.1.5. Advanced Tour Groups.....	45
5.2. Shift Templates.....	46
5.2.1. Manage Shift Templates.....	47
5.2.2. Add New Shift Template.....	47
5.2.3. Edit Shift Template.....	48
5.2.4. Delete Shift Template .....	48
6. Operating Hours.....	49
6.1. Stream .....	49

6.1.1. Manage Stream Operating Hours.....	49
6.1.2. Add New Stream Operating Hours .....	50
6.1.3. Edit Stream Operating Hours .....	50
6.1.4. Delete Stream Operating Hours.....	50
6.2. Organizational Unit.....	50
6.2.1. Manage Organizational Unit Operating Hours .....	51
6.2.2. Add New Operating Hours .....	51
6.2.3. Edit Operating Hours .....	52
6.2.4. Delete Operating Hours.....	52
7. Users.....	53
7.1. Manage Users .....	53
7.1.1. Edit User .....	54
7.1.2. Delete User .....	55
7.1.3. Change Password.....	55
7.2. New User .....	55
8. Roles .....	57
8.1. Manage Roles .....	57
8.2. Add New Role .....	57
8.3. Edit Permissions.....	58
8.4. Delete a Role .....	58
9. Audit.....	59
9.1. User Action Log.....	59
9.2. Download User Action Log.....	59
10. Operations.....	61
10.1. Published Packages.....	61
10.1.1. Edit Published Package.....	61
10.1.2. Delete Published Package .....	61
10.2. Manage Tags.....	61
10.2.1. Add New Tag .....	62
10.2.2. Edit Tag .....	62
10.2.3. Delete Tag.....	62
11. System Settings .....	63
11.1. Application Settings .....	63
11.1.1. Configuring Settings .....	63
11.1.1.1. Forecasting Period.....	63
11.1.1.2. Scheduling Period .....	63

11.1.1.3. Database Time Zone.....	63
11.1.1.4. Tour Group Rollup Threshold .....	63
11.1.1.5. Site Access.....	64
11.1.1.6. First Day of Week.....	64
11.1.1.7. Forecast Types Allowed For Exporting .....	64
11.1.1.8. System email .....	64
11.1.1.9. Initial Preferences Edit Period .....	64
11.1.1.10. Subsequent Preferences Edit Period.....	64
11.1.1.11. Overtime Limit Applied To Pick Available Shift.....	64
11.1.1.12. Agent Responsible For Dropped Shift If Not Taken.....	64
11.1.1.13. Allow Future Exceptions without Schedule .....	64
12. Data Management .....	64
12.1. Streams .....	65
12.1.1. Stream Data .....	65
12.1.1.1. View Stream Data .....	65
12.1.1.2. Edit Stream Data .....	66
12.1.1.3. Graph Stream Data .....	67
12.1.2. Upload Stream Data .....	67
12.1.2.1. Upload Data File .....	67
12.1.2.2. Select Appropriate Columns.....	68
12.1.2.3. Preview and Save Stream Data.....	68
12.2. Special Events.....	69
12.2.1. Manage Special Events.....	69
12.2.1.1. Add New Special Event .....	69
12.2.1.2. Edit Special Event .....	70
12.2.1.3. Delete Special Event.....	70
12.2.2. Update Special Events Data .....	70
12.3. Exceptions.....	71
12.3.1. Manage Exceptions .....	71
12.3.1.1. Add New Exception.....	71
12.3.1.2. Edit an Exception .....	72
12.3.1.3. Delete an Exception .....	72
13. Glossary .....	73
13.1. Accessing the Glossary.....	73
13.1.1. Search .....	73
13.2. Managing the Glossary .....	74
14. Workflow Management .....	75
14.1. Creating a New Workflow Template.....	75
14.2. Creating a Work Order .....	76
14.3. Manage My Workflow Assignments.....	77
14.4. Workflow Reports .....	78
15. Agent Lists.....	79

15.1	Creating a New Agent List .....	79
15.1.1.	Add New Agent List.....	80
15.1.2.	List Wizard .....	80
15.1.3.	Download Template .....	81
16.	Segment Bidding .....	82
16.1	Create New Segment Bidding Period .....	82
16.1	Edit Segment Bidding Period .....	83
16.2	Delete Segment Bidding Period .....	83



# 1. Overview

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The WFM v2 Workforce Management (WFM) Portal Website, which will be referred to simply as the Website, is the user interface providing access to all of its modules. It also provides administrative features for managing data, agents, contact centers, and users of the WFM Portal.

The purpose of this User Manual is to provide a comprehensive description of the administrative features of the WFM Portal. This document is organized by Website feature. The following documentation provides information on various other modules and functionality:

- WFM v2 Forecaster Web Site User Manual
- WFM v2 Planner Web Site User Manual
- WFM v2 Scheduler Web Site User Manual

*Note: Depending on the modules licensed, not all functionality discussed in this document may be available for the administrators to configure.*

## 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. When a user first accesses the Website, the *Home* page contains the Login module, and other public modules.

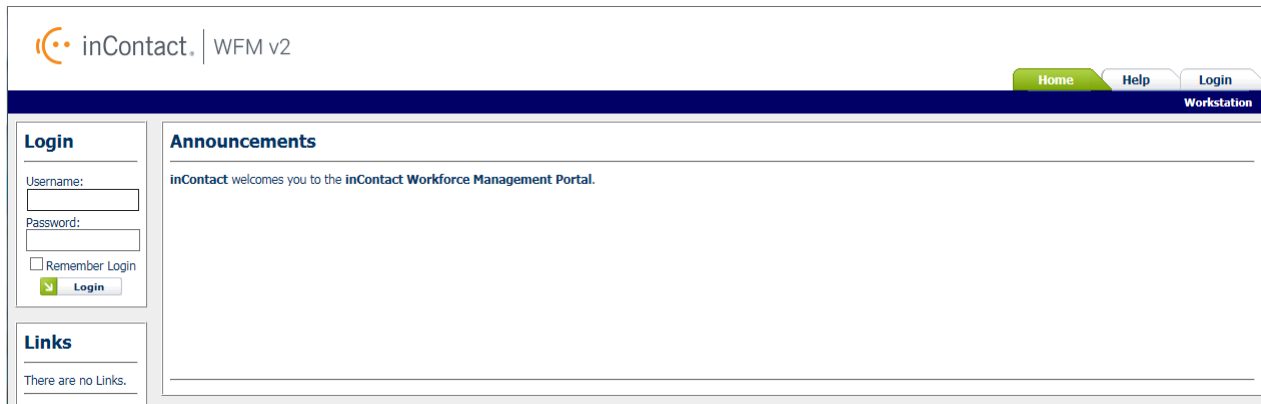


Figure 2.1 – Home Page with Login Module

### 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 in Figure 2.2.

The screenshot displays the home page for an authenticated user in the inContact WFM v2 portal. The interface includes a top navigation bar with tabs for Home, Database, Planning, Administration, and Help. The main content area is organized into several functional sections:



- Summary:** Provides key performance indicators such as 'My Completed Forecasts: 12', 'My Completed Schedules: 4', and 'Total Completed Forecasts: 13'. It also shows 'Forecasts Queued: 0' and 'Schedules Queued: 0', along with the last forecast and schedule dates.
- Announcements:** Contains a list of system updates, including a welcome message and a 'Site Data Updated' notice stating that 'User admin' updated 1 field in Site Data Floor Headcount for .demo for the week of 9/12/2015.
- Discussions:** Displays a list of discussion threads. The current thread is 'Trial Discussion' started by 'demo admin' on 09/14/2015 at 03:39:01. An 'Add Discussion Item' link is visible at the bottom right of this section.
- Contacts:** Features a table with columns for Name, Role, Email, Primary Phone, and Mobile Phone.
- Events:** A calendar view for February 2016, with a 'Manage Events' link below it.
- Change Password:** A form with fields for 'Current Password', 'New Password', and 'Confirm New Password', and a 'Change Password' button.

Figure 2.2 – Home Page for Authenticated Users

## 2.2. Discussions

The *Discussions* module permits users to submit messages to a discussion forum. The current threads of discussion are displayed in the *Discussions* module as links. Clicking on the plus sign to the left of the discussion subject opens that thread of discussion and displays any responses. Clicking on the *Add Discussion Item* link will open a new discussion as shown in Figure 2.3.

## Discussions

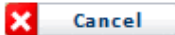

	Thread / Thread Starter	Last Post
	<a href="#">Sample Discussion</a> Sean Lensborn	05/23/2005 03:58:13 by Sean Lensborn
	<a href="#">Testing Discussions</a> Sean Lensborn	11/30/2005 02:20:06 by Test User

1

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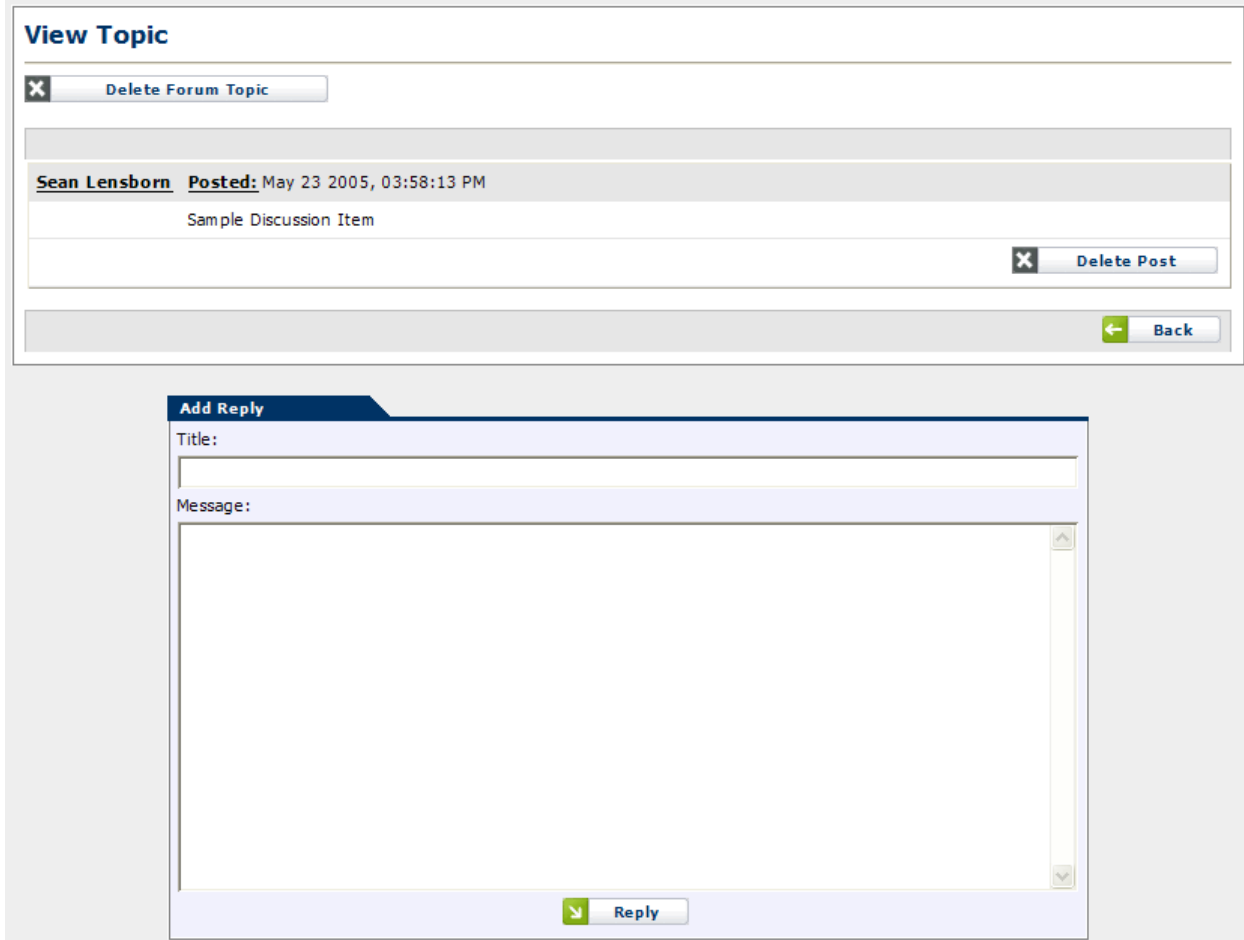
Title:

Message:

 **Cancel**  **Add Discussion**

**Figure 2.3 – Add a New Topic**

Clicking on the *Cancel* button returns the browser to the *Home* page. Selecting the *Add Discussion* button allows the user to submit a message to a new discussion thread. Other users will then be able to reply to that thread. Clicking on the subject of a message will display the content of that message, as shown in Figure 2.4.



**Figure 2.4 – Content of Discussion Message**

Clicking on the *Reply* button allows the user to create a response to the message, which will be in the same discussion thread as the original message.

### **2.3. Announcements**

The *Announcements* module allows the user to post general announcements that all users can read as shown in Figure 2.5. These announcements are similar to discussion messages. However, they can be configured to expire automatically by a certain date. To add a new announcement, click on the *Add Announcement* button and enter the appropriate information as shown in Figure 2.6.

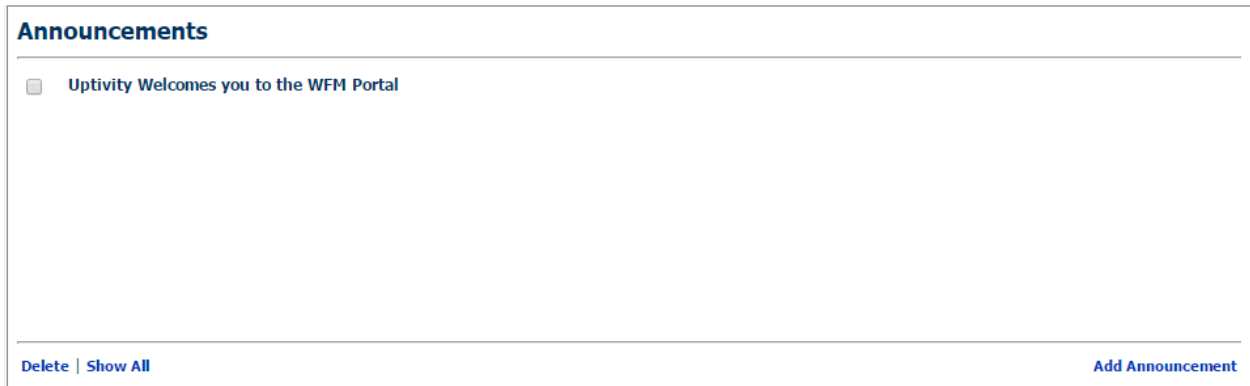


Figure 2.5 – Announcements Section

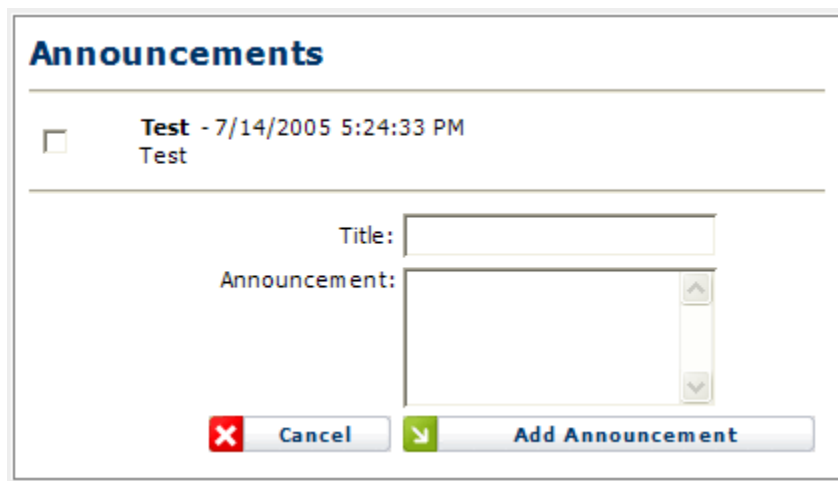


Figure 2.6 – Add a New Announcement

## 2.4. Contacts for Information

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* button and enter the appropriate information as shown in Figure 2.7.

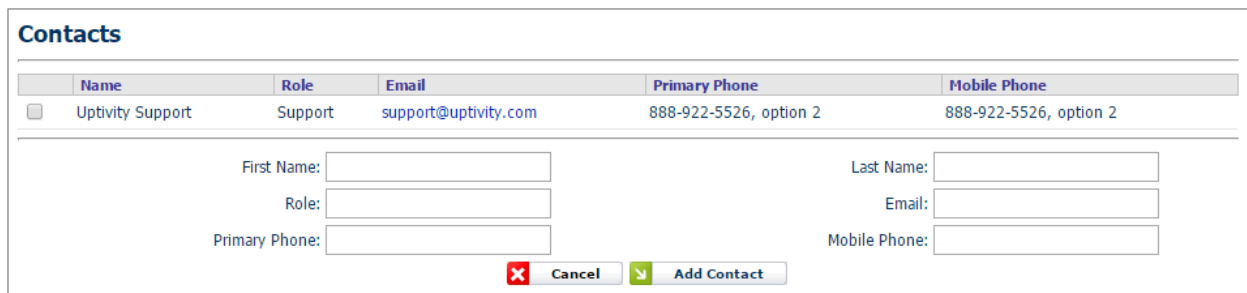


Figure 2.7 – Add New Contact Information.

## 2.5. Links

The *Links* module allows users to add useful hyperlinks, for display on the *Home* page, that are shared by all users of the site. To add a new link, click on *Add Link* and enter the appropriate information.



The screenshot shows a web interface titled "Links". Below the title is a horizontal line. Underneath the line is a checkbox followed by the text "inContact". Below this is another horizontal line. At the bottom of the interface, there are two buttons: "Delete" on the left and "Add Link" on the right.

Figure 2.8 – Add New Link

## 2.6. Events

The *Events* module displays the calendar for the current month, and allows users to post events to appear in that calendar. The user can scroll to the next or previous months by clicking on the arrows on either side of the month name in the calendar heading. To add an event, click on *Manage Events* and enter the appropriate information.

## 2.7. 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.



The screenshot shows a web interface titled "Change Password". Below the title is a horizontal line. Underneath the line are three input fields, each with a label above it: "Current Password:", "New Password:", and "Confirm New Password:". Below the input fields is a button with a green downward-pointing arrow icon and the text "Change Password".

Figure 2.9 – Change Password

To change the password of another user, a user with Administrator access level must use the *Manage Users* page.

## 2.8. Logout

The *Logout* 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 2.10. A user's authenticated session begins when he or she logs in to the site. This authenticated session ends when the user selects the *Logout* 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 *Logout* 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.

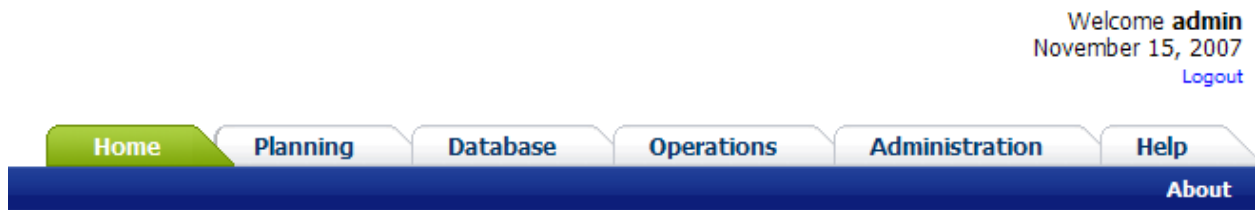


Figure 2.10 – Logout



## 3. Workforce

The *Workforce* module handles the management of the agent related information configured in the system. The *Skill Levels* module handles configuration of skill levels for Contact Groups. The *Skill Groups* module handles the configuration of Skill Groups, which define the combination of Skills and Skill Levels that are to be considered for Skills-based scheduling. The *Agents* module provides functionality to define the specifics of individual agents within the system. The *Team Leads* module handles the configuration of supervisors. The *Multiple Agents* module allows the configuration and entry of Multiple Agents at a time. The *Agent Attributes* module allows the user to define new attributes that can then be tracked for individual agents. The *Agent Query* page provides functionality for querying the number of agents. The details of each module are discussed in this section.

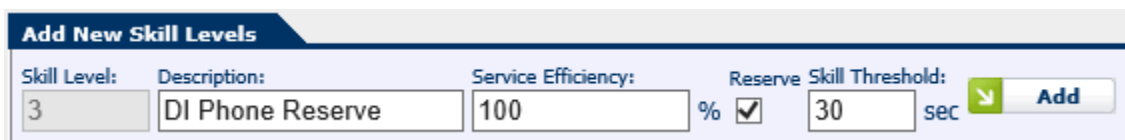
*Note: This module will be available if the Planner or Scheduler module is installed.*

### 3.1. Skill Levels

The *Skill Levels* module handles configuration of skill levels for Contact Groups. An agent is assigned a skill level for each skill assigned. Skill levels are also used in the definition of Skill Groups. The *Skill* link choice appears under the *Database -> Workforce* menu item.

#### 3.1.1. Add New Skill Levels

Select the desired Environment from the drop-down list; select the desired Contact Group from the drop-down list. To add a new skill level, use the Add New Skill Levels form (Figure 3.1). The user must provide a Description, a Service Efficiency percentage, check if this is a Reserve skill (e.g. inbound skills of an outbound agent). If the skill level is a reserve skill level, the user must also provide a Threshold in seconds for that skill level to be activated. Then click on the *Add* button to add the skill level to the system.




Skill Level:	Description:	Service Efficiency:	Reserve	Skill Threshold:	
3	DI Phone Reserve	100 %	<input checked="" type="checkbox"/>	30 sec	

Figure 3.1

#### 3.1.2. Edit Skill Levels

Each row in the *Skill Levels* module has a link to edit the details. Click on the *Edit* icon button in the Action column for the row to open the *Description* and *Service Efficiency* edit box. To save changes click on the *Green check OK* icon button. To cancel changes click on the *Cancel* icon button.

#### 3.1.3. Delete Skill Levels

A Skill Level can be deleted by clicking on the *Delete* icon button in the Action column. A message will appear asking the user to confirm the delete. A skill level that has been assigned to at least one agent or used in at least one Skill Group cannot be deleted.


## 3.2. Skill Groups

The Skill Groups module handles the configuration of Skill Groups, which define the combination of Skills and Skill Levels that are to be considered for Skills-based scheduling. A Skill Group consists of a set of skills, each with a specified minimum Skill Level. Agents that are configured with the same skills at the specified skill levels will automatically be considered as part of the Skill Group. The *Skill Groups* choice appears in the *Database -> Workforce* menu.

### 3.2.1. Add New Skill Group

To add a new skill group, use the Add New Skill Group form. The user must provide a Name, Description, Select Environment, and select an Occupancy/Shrinkage Profile. Then click on the *Add Skill Group* button to open the Edit Skill Group form. Add New Contact Group by selecting the contact group and skill level, then click on the *Add Contact Group* button. Select the *Save Skill Group* button to save the skill group to the system. Select the *Cancel* button to return to the Manage Skill Groups list.

### 3.2.2. Automatic Identification of Skill Groups

To identify skill groups in an environment automatically, use the Skill Group Identification wizard  (Figure 3.2). The user must select Delete or Rename on the Existing Skill Groups drop-down before generating and adding new skill groups.

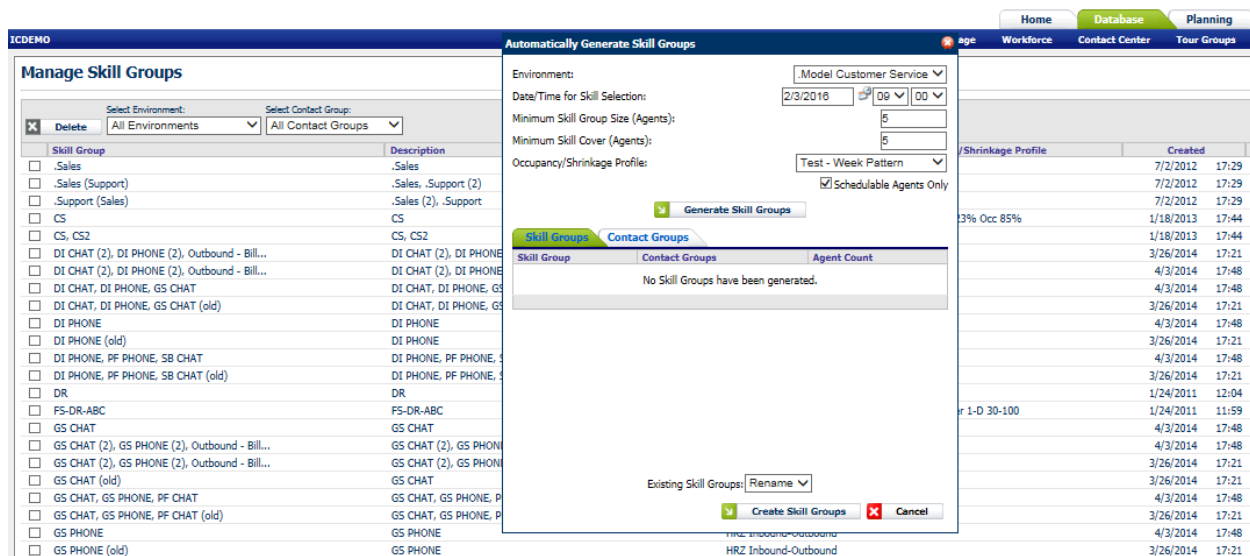


Figure 3.2

**Warning:** Deleting or Renaming existing skill groups in an environment will invalidate all queued, executing and completed schedule runs for that environment.

### 3.2.3. Edit Skill Group

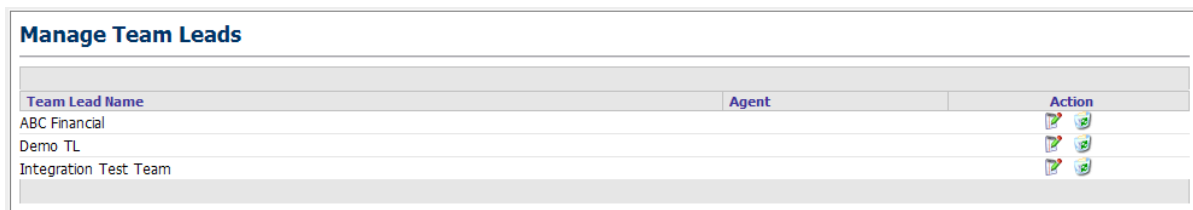
Each row in the *Skill Groups* Module has a link to edit the details. Click on the *Edit* icon button in the Action column for the Edit Skill Group window to open. To save changes, click on the *Save Skill Group* button. To cancel changes, click on the *Cancel* button.

### 3.2.4. Delete Skill Groups

Each row in the *Skill Groups* module has a link to delete. To delete a Skill Group, Click on the *Delete* icon button in the Action column. A message will appear asking the user to confirm the delete. A skill group that is referenced by an existing schedule run cannot be deleted.

## 3.3. Team Leads

The *Team Leads* module (Figure 3.3) allows the configuration of Team Leads (or Supervisors) within the database. Team leads may or may not be agents. The *Team Leads* choice appears in the *Database -> Workforce* menu.









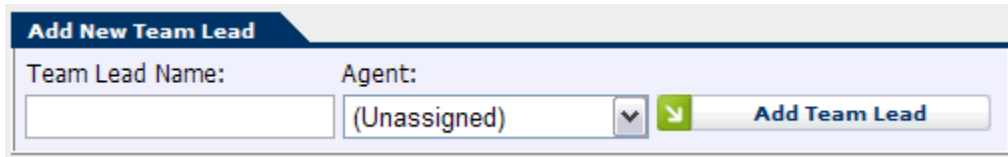
Team Lead Name	Agent	Action
ABC Financial		 
Demo TL		 
Integration Test Team		 

Figure 3.3 - Manage Team Leads


### 3.3.1. Add Team Lead

A new Team Lead can be added to the database using the Add New Team Lead area (Figure 3.4). A Team Lead Name and an Agent ID should be provided for the new Team Lead. To save the new Team lead, click on the *Add Team Lead* button.



**Add New Team Lead**

Team Lead Name:

Agent: (Unassigned) 


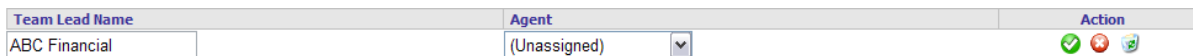
 **Add Team Lead**

Figure 3.4 - Add New Team Lead

### 3.3.2. Edit Team Lead

To edit a Team Lead, click on the *Edit* icon button in the corresponding row. The Edit Team Lead Area should appear similar to as shown in Figure 3.5. The Team Lead Name and Agent ID can be modified in this area as required. The changes can be saved by clicking on the *OK* icon button, or cancelled by clicking on the *Cancel* icon button.






Team Lead Name	Agent	Action
<input type="text" value="ABC Financial"/>	(Unassigned) 	 

Figure 3.5 - Edit Team Lead

### 3.3.3. Delete Team Lead

To delete a Team Lead, click on the *Delete* icon button in the corresponding row. The user will be asked to confirm the deletion prior to the record being removed from the system.

### 3.4. Agents

The *Agents* module handles the configuration of Agents within the System. 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). The *Agents* choice appears in the *Database -> Workforce* menu.

#### 3.4.1. Manage Agents

The *Manage Agents* module, shown in Figure 3.6, displays a list of agents, which have been configured within the system. One can filter the list 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.

Manage Agents							
Filter: All Agents		Order By: Last Name		Ascending	Retrieve Agents		Page 1
Last Name	First Name	HR ID	Team	Management Level	Date Created	Date Modified	Action
_Agent John		1133607	Demo TL		8/22/2007 10:21 AM	8/22/2007 10:21 AM	
_Agent Sean		1133914	Demo TL		8/22/2007 10:21 AM	8/22/2007 10:21 AM	
_Agent Turgut		1132394	Demo TL		8/22/2007 10:21 AM	8/22/2007 10:21 AM	
_Executive			(None)	Executive	2/5/2007 07:05 PM	8/16/2007 11:47 AM	
01_aaa_1	turgut	aykin	(None)		5/22/2007 11:21 AM	7/19/2007 12:09 PM	
03_csg_5_8 1		951429	(None)		4/5/2007 04:46 PM	4/26/2007 06:03 PM	
03_csg_5_8 10		951438	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 100		951528	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 11		951439	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 12		951440	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 13		951441	(None)		4/5/2007 04:46 PM	4/10/2007 03:49 PM	
03_csg_5_8 14		951442	(None)		4/5/2007 04:46 PM	4/10/2007 03:49 PM	
03_csg_5_8 15		951443	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 16		951444	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 17		951445	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 18		951446	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 19		951447	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 2		951430	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 20		951448	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	
03_csg_5_8 21		951449	(None)		4/5/2007 04:46 PM	4/5/2007 04:46 PM	

Figure 3.6 - Manage Agents

#### 3.4.2. Add New Agent

The *Add New Agent* control (Figure 3.7) 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
Environment	Environment for this Agent
Organizational Unit	Agent's Organizational Unit
Contact Group	Agent's Contact Group (skill)
Skill Level	Agent's Skill Level (highest: 1)
Shift	Shift Template for this Agent
Tour	Tour Group for this Agent
Management Level	Level at Which this Agent can Manage

Click on the *Add Agent* button to add the Agent to the database.

**Figure 3.7 - Add New Agent**

### 3.4.3. Edit Agent

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

#### 3.4.3.1. Edit Agent Summary

The Edit Agent Summary Area (Figure 3.8) handles editing of the following fields.

Field	Description
<b>Last Name</b>	Agent's Last Name
<b>First Name</b>	Agent's First Name
<b>Team Lead</b>	Agent's Team Lead
<b>HR ID</b>	Human Resources ID
<b>Telephone 1</b>	Primary Telephone Number for Agent
<b>Telephone 2</b>	Secondary Telephone Number for Agent
<b>Date Created</b>	Date the Agent record was created ( <b>not editable</b> )
<b>Date Modified</b>	Date the Agent record was last modified ( <b>not editable</b> )
<b>Seniority Date</b>	Default or a specific Seniority Date
<b>Logon User ID</b>	Logon ID for WFM
<b>Email Address</b>	Email Address for the Agent
<b>Management Level</b>	Level at which Agent can Manage
<b>CSI</b>	Customer Satisfaction Index
<b>SAI</b>	Schedule Adherence Index

Last Name:	<input type="text" value="_Agent John"/>	Seniority Date:	Date ... <input type="text" value="3/16/2004"/>
First Name:	<input type="text"/>	Telephone 1:	<input type="text"/>
Team Lead:	<input type="text" value="Demo TL"/>	Telephone 2:	<input type="text"/>
HR ID:	<input type="text" value="1133607"/>	PrimarySkillCount:	<input type="text"/>
Email Address:	<input type="text"/>	Customer Satisfaction Index:	<input type="text"/>
Date Created:	<b>8/22/2007 10:21 AM</b>	Schedule Adherence Index:	<input type="text"/>
Date Modified:	<b>8/22/2007 10:21 AM</b>		
Management Level:	<input type="text" value="None"/>		

**Figure 3.8 - Agent Summary**

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

### 3.4.3.2. Agent Configuration

The *Agent Configuration* area of the *Edit Agent* module (Figure 3.9) allows the Agent's Organizational Unit, Availability, and Tour Assignments to be configured. To edit any of these fields, click on the *Edit* icon button in the corresponding row, make the appropriate changes, and then click on the *OK* icon button to save the changes. Clicking on the *Delete* icon button will remove that assignment. The changes will take affect when the *OK* or *Delete* icon button 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.

Agent Assignments		Agent Skill Assignments		Agent Preferences							
Agent Organizational Unit Assignment											
Organizational Unit		Start Date	End Date	Action							
There are no Organizational Units assignments to view.											
<input type="button" value="Add"/>											
Agent Tour Group Assignments											
Daily Availability											
Tour Group	Shift	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start Date	End Date	Action
There are no Agent Tour Assignments to view.											
Select Tour:	Select Shift:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Select Start Date:	Select End Date:	<input type="button" value="OK"/>
<input type="text" value="08:00 - 10:00   8-10 HR"/>	<input type="text" value="E:08 / L:12   8.0 HR"/>	<input type="text" value="0:00"/>	<input type="text" value="0:00"/>	<input type="text" value="0:00"/>	<input type="text" value="0:00"/>	<input type="text" value="0:00"/>	<input type="text" value="0:00"/>	<input type="text" value="0:00"/>	<input type="text" value="Default"/>	<input type="text" value="Default"/>	<input type="button" value="Cancel"/>
		<input type="text" value="24:00"/>	<input type="text" value="24:00"/>	<input type="text" value="24:00"/>	<input type="text" value="24:00"/>	<input type="text" value="24:00"/>	<input type="text" value="24:00"/>	<input type="text" value="24:00"/>			
Agent Availability											
Minimum Hours Per Week	Maximum Hours Per Week	Default Fixed Schedule	Default Must-Work	Active	Start Date	End Date	Action				
<input type="text" value="09   .00"/>	<input type="text" value="37   .00"/>	<input type="text" value="No"/>	<input type="text" value="No"/>	<input type="text" value="Yes"/>	Select Start Date:	Select End Date:	<input type="button" value="OK"/>				
					<input type="text" value="Default"/>	<input type="text" value="Default"/>	<input type="button" value="Add"/>				

**Figure 3.9 - Agent Configuration**

### 3.4.3.3. Agent Skill Assignments

Agent skills may be entered manually or uploaded automatically. The user may use the *Agent Skill Assignments* area for configuring agent skills manually. The following table details the fields in the *Agent Assignment* area:

Field	Description
Environment	Environment for the skill assignment
Skill	Contact group assigned
Skill Level	Agent's Skill Level (highest: 1)

<b>Start Date</b>	Start date for skill and skill level
<b>End Date</b>	End date for skill and skill level

#### 3.4.3.4. Agent Availability

The *Agent Availability* area of the *Edit Agent* module (Figure 3.9) provides functionality to enter or edit an Agent's Weekly and Daily Availability configuration. To edit any of these values, simply make the appropriate change. If the check box above a day is marked for an agent, the daily hours configured will be applied as hard constraints for that agent. Clicking on the *Delete* icon button will remove the corresponding configuration. The changes take effect when the *Update* button in the upper left hand corner is clicked. To add a new Availability record, click on the *Add* button, select the appropriate fields, and then click on the *OK* icon button to save the new Availability record.

#### 3.4.3.5. Agent Preferences

The *Agent Preferences* area displays the preferred hours entered by an agent. These preferences are used in the *Bid Manager* module to assign agents to schedules when it is run in the auto-bidding mode. The following table details the fields in the *Agent Preferences* area:

Field	Description
<b>Minimum Hours Per Week</b>	Minimum Number of Work Hours Agent is available
<b>Maximum Hours Per Week</b>	Maximum Number of Work Hours Agent is available
<b>Default Fixed Schedule</b>	Equals "Yes" if the agent is on a fixed schedule, and "No" otherwise
<b>Default Must-Work</b>	Equals "Yes" if the agent must be scheduled ("Must-Work"), and "No" otherwise
<b>Active</b>	Agent's state -if "No", the agent will not be scheduled
<b>Day</b>	Day of week for daily availability
<b>Start Date</b>	Specific start date, or default for this record
<b>End Date</b>	Specific end date, or default for this record
<b>Start Time</b>	Daily Start Time in Hour: Minute format
<b>End Time</b>	Daily End Time –in Hour: Minute format

Agent Availability							
Minimum Hours Per Week	Maximum Hours Per Week	Default Fixed Schedule	Default Must-Work	Active	Start Date	End Date	Action
42:00	42:00	No	No	Yes	Default	Default	
							Add
Agent Preferences							
Day	Start Time	End Time	Start Date	End Date	Action		
Sundays	0:00	24:00	Default	Default			
Mondays	0:00	24:00	Default	Default			
Tuesdays	0:00	24:00	Default	Default			
Wednesdays	0:00	24:00	Default	Default			
Thursdays	0:00	24:00	Default	Default			
Fridays	0:00	24:00	Default	Default			
Saturdays	0:00	24:00	Default	Default			
							Add

**Figure 3.10 - Agent Availability**

### 3.4.4. Delete Agent

Clicking on the *Delete* icon button of the *Manage Agents* module will remove the Agent in the corresponding row from the database. The user will be prompted to confirm this decision.

### 3.4.5. Agent Licenses

Every agent marked Active (see Figure 3.10) requires a WFM Portal license. Thus, the number of Active agents in the WFM Portal database should be less than or equal to the number of agent licenses purchased by your company for the WFM Portal. Please see the Master Services Agreement, Software Schedule, Statement of Work or similarly named documents signed by your company and inContact, Inc. for the WFM Portal licensing to find out the number of agent licenses purchased by your company.

*Warning: Some modules and functionality of the WFM Portal may not be available if the number of Active agents exceeds the number of agent licenses purchased by your company.*

## 3.5. Multiple Agents

The Multiple Agents module allows the configuration and entry of Multiple Agents at a time. In order to add more than one agent using the Multiple Agents module, the agents should belong to the same organizational unit, and have the same skills. Moreover, these agents should have the same tour group (weekly work pattern) and shift template (daily work pattern). The *Multiple Agents* choice appears in the *Database -> Workforce* menu.

### 3.5.1. Manage Multiple Agents

The *Manage Multiple Agents* module, displayed in Figure 3.11 displays agents who have been configured within the system. Agents can be displayed for an Organizational Unit, Tour Group, and Team Lead. These agents can be further filtered based on the Name.



Figure 3.11 - Manage Multiple Agents

### 3.5.2. Add Multiple Agents

The *Add Multiple Agents* control (Figure 3.12) allows adding a set of new agents to the database. To add agents, the following information should be provided.

Field	Description
<b>Environment</b>	Environment for Agents
<b>Business Unit</b>	Agents' Business Unit
<b>Organizational Unit</b>	Agents' Organizational Unit
<b>Tour Group</b>	Agents' Tour Group assignment
<b>Shift</b>	Agents' Shift Template assignment
<b>Skill_1</b>	Agents' skill 1
<b>Skill_2</b>	Agents' skill 2
<b>Skill_3</b>	Agents' skill 3
<b>Start Date</b>	Start Date for this configuration to be in effect for these new agents
<b>End Date</b>	End Date for this configuration to be in effect for there new agents
<b>Minimum Hours per Week</b>	Minimum number of work hours each agent is available
<b>MaximumHours per Week</b>	Maximum number of work hours each agent is available
<b>Name Prefix</b>	Common Prefix to be added for these agents
<b>Number of Agents</b>	Number of agents to create

The new agents are added to the database by clicking the *Add Agents* button.

Figure 3.12 - Add Multiple Agents

### 3.5.3. Edit Multiple Agents

Selecting the *Update Agents* button below the list of agents will reveal the update controls. Each row in the Manage Agents module has a checkbox that allows the row to be marked for editing. Once one or more rows are marked, these records may be updated or updated by configuring the update controls as appropriate, and clicking on the *Update Agent(s)* button.

The Update Multiple Agent Area (Figure 3.13) allows editing of the following fields.

Field	Description
<b>Start Date</b>	Agent's Availability Start Date
<b>End Date</b>	Agent's Availability End Date
<b>Minimum Hours per Week</b>	Minimum number of work hours Agent is available
<b>Maximum Hours Per Week</b>	Maximum number of work hours Agent is available
<b>Team Lead</b>	Team Lead these agents are assigned to.
<b>Fixed Schedule</b>	Equals "Yes" if the agent is on a fixed schedule, and "No" otherwise
<b>Must Work</b>	Equals "Yes" if the agent must be scheduled ("Must-Work"), and "No" otherwise
<b>Active</b>	Agent's state -if "No", the agent will not be scheduled
<b>Skills</b>	Determines whether skills should be updated.

The screenshot shows the 'Update Multiple Agents' form. It includes several dropdown menus for 'Team Lead', 'Fixed Schedule', 'Must Work', 'Active', 'Skills', 'Skill 1', 'Skill 2', 'Skill 3', 'Minimum Hours Per Week', and 'Maximum Hours Per Week'. Each dropdown menu has 'No Change' selected. There are also input fields for 'Select Start Date' and 'Select End Date', both set to 'Default'. A green 'Update Agents' button is visible at the bottom right.

**Figure 3.13 – Update Multiple Agents**

Selecting the *No Change* option causes that particular field to not be modified. The changes can be saved by clicking on the *Update Agent(s)* button.

### 3.5.4. Delete Multiple Agents

One or more agents can be deleted by marking the agents and then clicking the *Delete* button.

## 3.6. Agent Attributes

The Agent Attributes module allows the user to define new attributes that can then be tracked for individual agents. There are several attributes, such as Last Name, and Email Address, which are provided by default. New attributes defined in the Agent Attributes module will appear in the Agents Summary Area (see section 3.4.3.1, above) where values may be entered and stored for individual agents. The *Agent Attributes* choice appears in the *Database -> Workforce* menu.

### 3.6.1. Add New Attribute

Use the *Add New Attribute* form (Figure 3.14) to add a new attribute to the system. The user must provide a Name, Data Type from the drop-down box, a Default Value and choose the Read Only option if desired. Click the *Add* button to complete the addition.

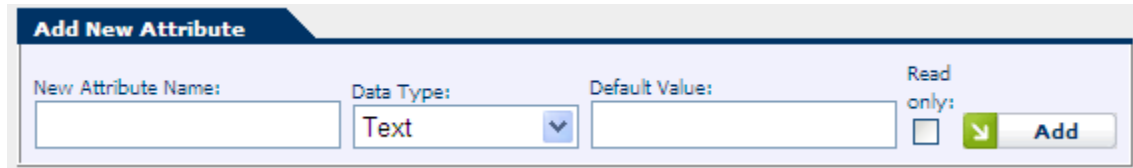


Figure 3.14

### 3.6.2. Edit New Attribute

To edit a *New Attribute*, click on the *Edit* icon button in the corresponding row in the Agents Attribute module. Modify a record and then click on the *OK* to save the changes. Only the user created Attributes are editable, default system Attributes may not be edited.

### 3.6.3. Delete New Attribute

To delete a *New Attribute*, click on the *Delete* icon button in the corresponding row in the Agents Attribute module. The user will be prompted to confirm the decision before the record is removed from the system.

## 3.7. Agent Query

The *Agent Query* page provides functionality for querying the number of agents (Figure 3.15). The following options are available to query the number of agents:

- Agent Tour Counts by date
- Schedulable Agent counts
- Schedulable Agent counts by Business Unit
- Schedulable Agent counts by Organizational Unit
- Non-schedulable Agent counts by Reason
- Schedulable Agents List
- Non-schedulable Agents List

One or more environments can be selected by clicking on the environment name from the list of environments displayed. The *Select All* button can be used to select all of the environments in the database, and the *Clear Selection* button can be used to de-select all of the environments. The *Agent Query* choice appears in the *Database -> Workforce* menu.

Select a Query:  
Agent Tour Counts by Date

Select Environment(s):  
 ABC Financial - D  
 ABC\_EPS\_UA  
 Alltel  
 Alltel - SB  
 Charter NE

Select All Clear Selection

Date: 11/21/2007

View Results Download Results

**Figure 3.15 - Agent Query**

Clicking on the *View Results* button displays the results similar to as shown in Figure 3.16.

Select a Query:  
Agent Tour Counts by Date

Select Environment(s):  
 ABC Financial - D  
 ABC\_EPS\_UA  
 Alltel  
 Alltel - SB  
 Charter NE

Select All Clear Selection

Date: 11/21/2007

View Results Download Results

Agent Tour Counts by Business Unit and Organizational Unit for 11/21/2007					
Environment	Business Unit	Organizational Unit	Tour	Shift	Agent Count
ABC Financial - D	ABC Financial - D	ABC Financial - D	D 4x10	D 10-hr	1035
ABC Financial - D	ABC Financial - D	ABC Financial - D	D 5x4	D 4-hr	25
ABC Financial - D	ABC Financial - D	ABC Financial - D	D 5x6	D 6-hr	358
ABC Financial - D	ABC Financial - D	ABC Financial - D	D 5x8	D 8-hr	1330

**Figure 3.16 - Query Results**

The results can be downloaded into an Excel spreadsheet, as shown in Figure 3.17, by clicking on the *Download Results* button.

	A	B	C	D
1	Schedulable Agent Counts by Business Unit			
2	Environment	Business Unit	Agent Count	
3	GS	BAG	193	
4	GS	BAG FC	66	
5	GS	CSD	196	
6	GS	DL DIRECT	579	
7	GS	DL DIRECT INTL	90	
8	GS	GS	2815	
9	GS	ICSD	98	
10	GS	ISMS	1045	
11	GS	SMS	475	
12				
13				
14				

Figure 3.17 - Downloaded Query Results

### 3.8. Agent Daily Availabilities

The *Agent Daily Availabilities* page provides functionality for viewing each agent's Daily Availabilities for scheduling. (Figure 3.18).

Agent Daily Availabilities												
Environment	Business Unit	Org Unit	Team	Filter	Filter Date	Day of Week						
Mon	Tue	Wed	Thu	Fri	Sat	Sun						
.Model Customer Service	.Model	CS_Eastern_Agent 6		All Agents	01/16/2015	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00
.Model Customer Service	.Model	CS_Eastern_Agent 13		All Agents	01/16/2015	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00
.Model Customer Service	.Model	CS_Eastern_Agent 20		All Agents	01/16/2015	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00
.Model Customer Service	.Model	CS_Eastern_Agent 22		All Agents	01/16/2015	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00
.Model Customer Service	Model_CS_Eastern	CS_Eastern_Agent 27		All Agents	01/16/2015	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00
.Model Customer Service	.Model	CS_Eastern_Agent 29		All Agents	01/16/2015	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00
.Model Customer Service	.Model	CS_Eastern_Agent 31		All Agents	01/16/2015	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00
.Model Customer Service	.Model	CS_Eastern_Agent 36		All Agents	01/16/2015	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00	00:00-24:00

Figure 3.18

### 3.9. Import Agents

The *Import Agents* page provides functionality for uploading a list of agents and their attributes into WFM v2 WFM Portal. (Figure 3.19).

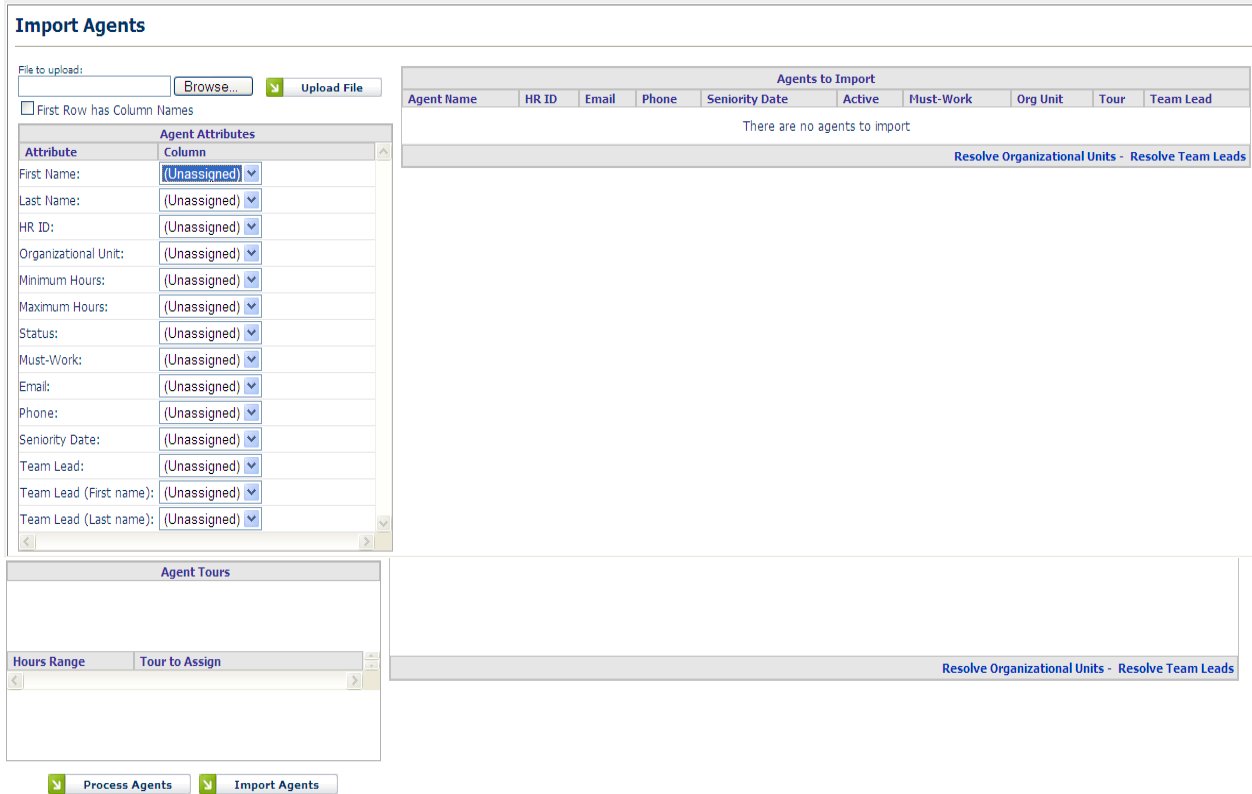


Figure 3.19

### 3.10. Import Skills

The *Import Skills* page provides functionality for uploading a list of agents and their Skills into WFM v2 WFM Portal. (Figure 3.20).

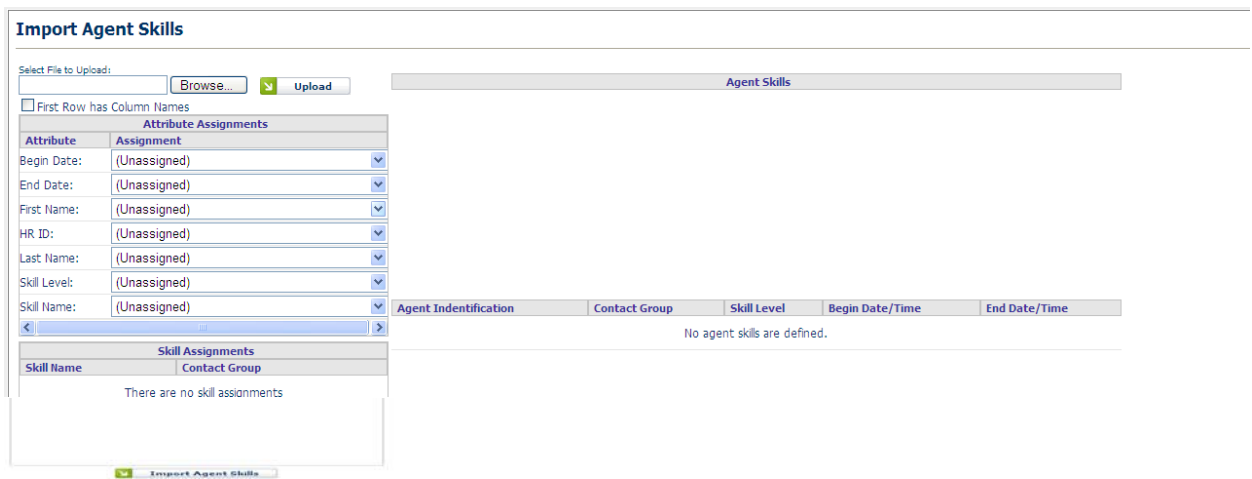


Figure 3.20

## 4. Contact Centers

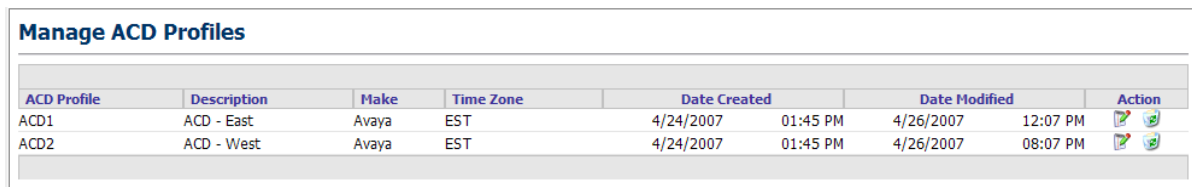
The *Contact Centers* module provides functionality for managing the contact center related information in the database. The following sections provide information on how to configure various components of Contact Centers.

### 4.1. ACDs

An ACD defined within the database represents an individual ACD within the organization.

#### 4.1.1. Manage ACD Profiles

The *Manage ACD Profiles* module (Figure 4.1) lists the ACDs currently configured in the database.







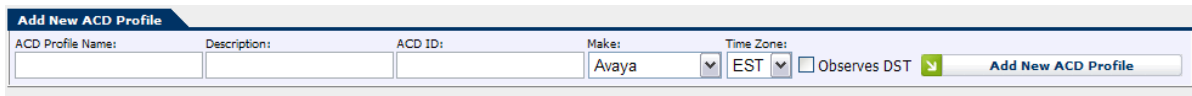
ACD Profile	Description	Make	Time Zone	Date Created	Date Modified	Action
ACD1	ACD - East	Avaya	EST	4/24/2007 01:45 PM	4/26/2007 12:07 PM	 
ACD2	ACD - West	Avaya	EST	4/24/2007 01:45 PM	4/26/2007 08:07 PM	 

Figure 4.1 - Manage ACD Profiles

#### 4.1.2. Add New ACD Profile

Use the *Add New ACD Profile* area (Figure 4.2) to add a new ACD to the database. A Name and a Description should be provided for the ACD. Click *Add New ACD Profile* to save the environment.



ACD Profile Name:	Description:	ACD ID:	Make:	Time Zone:	<input type="checkbox"/> Observes DST	<a href="#">Add New ACD Profile</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	Avaya	EST		

Figure 4.2 - Add New ACD Profile

### 4.1.3. Edit ACD Profile

To edit an ACD Profile, click on the *Edit* icon button in the corresponding row in the *Manage ACD Profiles* module. Modify the ACD Profile Name, ACD ID or Description, and then click on the *Save ACD Profile* button to save the changes. Click on the *Cancel* button to discard the changes.

An ACD Profile should be populated to match the configuration of each ACD in the system. This information is used to more accurately simulate the effects of the hardware on the system. Refer to the ACD equipment manufacturer's documentation for more information.

**Edit ACD Profile**

Save ACD Profile Cancel

ACD Profile Name: US West Date Created: 11/6/2007 02:01 PM  
ACD ID: 21 Date Modified: 11/6/2007 02:04 PM  
Description: ACD2

Make: Avaya Time Zone: EST  Observes DST

Update Interval (minutes): 0 Agent Selection Option: Most Idle Agent

Maximum Inbound Contacts: 0 Call Selection Option: Highest Skill Level With Longest Waiting Time

Agent IP Address: Port: 0 ACD IP Address: Port: 0

[Advanced](#)

Figure 4.3 – Edit ACD Profile

#### 4.1.3.1. Make

Enter the name of the manufacturer for the ACD equipment.

#### 4.1.3.2. Update Interval

Enter interval in minutes for database updates.

#### 4.1.3.3. Maximum Inbound Contacts

Enter the maximum number of inbound contacts.



#### 4.1.3.4. Time Zone

Select the Time Zone (ET, CT, MT, and PT) for which the ACD is configured, as well as indicating whether the ACD location observes daylight savings time.

#### 4.1.3.5. Agent Selection Option

Select the option that matches the ACD configuration criteria for Agent Selection. Refer to the ACD equipment manufacturer's documentation for further information.

#### 4.1.3.6. Call Selection Option

Select the option that matches the ACD configuration criteria for Call Selection. Refer to the ACD equipment manufacturer's documentation for further information.

#### 4.1.3.7. ACD IP Address

This is the actual IP address and port of the ACD being configured within this profile.

#### 4.1.3.8. Agent IP Address

This is the location of the Agent database servicing this particular ACD.

#### 4.1.3.9. Advanced Settings

Queues can be configured on the *Advanced ACD Profile* configuration screen, as seen in Figure 4.4. This area is reached from the *Edit ACD Profile* page by clicking on the *Advanced* link. These queues can be used to map uploaded interval level data to Streams within the WFM database. Once a queue has been created and saved through this interface, it can then be used from within the *Edit Streams* page. See *Section 4.6.3* for more details on this process.



Queue Name	Queue ID	Skill ID	Action
CUST01	VCUST1	1248	 
SUP01	VSUP1	3717	 
SUP02	VSUP2	7718	 

Figure 4.4 – Advanced Settings

#### 4.1.3.9.1. Queue Name

This is the name given to the queue. This should correspond with the stream name used in the interval level data that is to be automatically imported into the WFM database.

#### 4.1.3.9.2. Queue ID

This is a unique identifier for this particular queue. This can be found within the ACD configuration.

#### 4.1.3.9.3. Skill ID

This is the ID of the skill being serviced by this particular queue. This value should be taken from the ACD configuration.

### 4.1.4. Delete ACD Profile

To delete an ACD Profile, click on the *Delete* icon button in the corresponding row in the *Manage ACD Profiles* module. The user will be prompted to confirm his or her decision before the record is removed from the system.

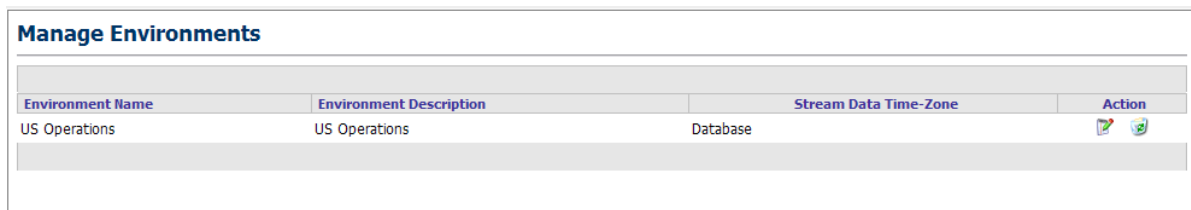
*Warning: If an ACD Profile is deleted, all data associated with that ACD Profile will be deleted from the database. To reenter the same ACD Profile into the database, it has to be added as a new ACD Profile, and all related data has to be updated as described below.*

## 4.2. Environments

An Environment is a group of *Business Units*, *Organizational Units*, *Contact Groups*, and *Streams*. It is a top-level unit that is used to aggregate these sub-units into one logical, self-contained entity. An environment does not share its sub-units, agents, or call traffic with the other environments. The *Manage Environments* module provides functionality for managing the configuration of Environments within the database. Environment sub-units are discussed in the sections below.

### 4.2.1. Manage Environments

The *Manage Environments* module (Figure 4.5) lists the Environments currently configured in the database.





Manage Environments			
Environment Name	Environment Description	Stream Data Time-Zone	Action
US Operations	US Operations	Database	 

Figure 4.5 - Manage Environments

### 4.2.2. Add New Environment

Use the *Add New Environment* area (Figure 4.6) to add a new Environment to the database. A Name, Description and default Time-Zone should be provided for the Environment. Click *Add New Environment* to save the environment.

Figure 4.6 - Add New Environment

### 4.2.3. Edit Environment

To edit an Environment, click on the *Edit* icon button in the corresponding row in the *Manage Environments* module. Modify the Environment Name or Environment Description, and then click on the *OK* icon button to save the changes. Click on the *Cancel* icon button to discard the changes.

### 4.2.4. Delete Environment

To delete an Environment, click on the *Delete* icon button in the corresponding row in the *Manage Environments* module. The user will be prompted to confirm his or her decision before the record is removed from the system.

*Warning: If an Environment is deleted, all data associated with that Environment will be deleted from the database. To reenter the same Environment into the database, it has to be added as a new Environment, and all related data has to be updated as described below.*

## 4.3. Business Units

A Business Unit is a group of Organizational Units. A Business Unit must belong to a single Environment. The *Manage Business Units* module provides functionality to manage the configuration of Business Units in the database.

### 4.3.1. Manage Business Units

The *Manage Business Units* module (Figure 4.7) lists the Business Units currently configured within the database. Business Units can be filtered by selecting an Environment from the *Select Environment* drop-down menu, or *All Environments* to display all Business Units in the database.

Environment	Business Unit	Description	Action
US Operations	US Operations	US Operations	

Figure 4.7 - Manage Business Units

### 4.3.2. Add New Business Unit

The *Add New Business Unit* area (Figure 4.8) can be used to add a new Business Unit to the database. The user must select an Environment for the Business Unit, and provide a Name

as well as a Description of the Business Unit. Click on the *Add New Business Unit* button to save the new Business Unit in the database.

The following table details the fields found in the *Add New Business Unit* area.

Field	Description
Environment	Environment to which the Business Unit belong
Business Unit	Name of the Business Unit
Description	Description of the Business Unit

**Figure 4.8- Add New Business Unit**

### 4.3.3. Edit Business Unit

To edit a Business Unit, click on the *Edit* icon button in corresponding row in the *Manage Business Units* module. The user may select an Environment from the *Environment* drop-down menu, and modify the Business Unit Name and/or the Business Unit Description. Click on the *OK* icon button to save the changes. Click on the *Cancel* icon button to discard the changes.

**Figure 4.9 - Edit Business Unit**

### 4.3.4. Delete Business Unit

To delete a Business Unit, click on the *Delete* icon button in the corresponding row in the *Manage Business Units* module. The user will be prompted to confirm his or her decision before all data related to this Business Unit is removed from the database.

*Warning: One or more Organizational Units may be assigned to a Business Unit. If a Business Unit is deleted, its Organizational Units should be assigned to other Business Units.*

## 4.4. Organizational Units

An Organizational Unit is used as a location entity for agents. An Organizational Unit may belong to a single Business Unit. Each Stream must be associated with a single Organizational Unit. The *Manage Organizational Units* module provides functionality for managing the configuration of Organizational Units in the database.

### 4.4.1. Manage Organizational Units

The *Manage Organizational Units* module (Figure 4.10) lists the Organizational Units currently configured within the database. The user may filter the Organizational Units by selecting an Environment from the *Select Environment* drop-down menu.

Manage Organizational Units								
Select Environment:								
US Operations								
Environment	Organizational Unit	Business Unit	Time Zone	GMT Offset	Observes Daylight Savings	Min. Time Between Shifts	Exclude From Scheduling	Action
US Operations Dallas	US Operations	US Operations	- 06:00		Yes	10:00	<input type="checkbox"/>	
US Operations Jacksonville	US Operations	US Operations	- 05:00		Yes	10:00	<input type="checkbox"/>	
US Operations Kamloops	US Operations	US Operations	- 07:00		Yes	10:00	<input type="checkbox"/>	
US Operations Manitoba	US Operations	US Operations	- 06:00		Yes	10:00	<input type="checkbox"/>	
US Operations Miami	US Operations	US Operations	- 05:00		Yes	10:00	<input type="checkbox"/>	
US Operations Mumbai	US Operations	US Operations	+ 04:30		No	5:00	<input type="checkbox"/>	

Figure 4.10 - Manage Organizational Units

#### 4.4.2. Add New Organizational Unit

The *Add New Organizational Unit* area (Figure 4.11) can be used to add a new Organizational Unit to the database. A Name and a Description of the Environment should be provided. Click *Add New Organizational Unit* to save the new Environment in the database.

The following table details the fields found in the *Add New Organizational Unit* area.

Field	Description
<b>Environment</b>	Environment to which this Organizational Unit belongs
<b>Name</b>	Name of this Organizational Unit
<b>Business Unit</b>	Business Unit of this Organizational Unit
<b>Time Zone</b>	Time Zone of this Organizational Unit (represented by the time offset from UTC/GMT).
<b>Observes Daylight Savings</b>	Whether or not this Organizational Unit observes Daylight Savings Time
<b>Minimum Separation Between Shifts</b>	Minimum time between consecutive shifts within this Organizational Unit, specified in Hours and Minutes

Add New Organizational Unit				
Environment:	Name:	Business Unit:	Time Zone GMT Offset:	<input type="checkbox"/> Exclude From Scheduling
Sales		(None)	- 12:00	
Observes Daylight Savings:	Min. Time Between Shifts:			
Yes	05 : 00			
Add Organizational Unit				

Figure 4.11 - Add New Organizational Unit

#### 4.4.3. Edit Organizational Unit

To edit an Organizational Unit, click on the *Edit* icon button in the corresponding row within the *Manage Organizational Unit* module. The user will be presented with an editable row, similar to as shown in Figure 4.12. Modify the Organization Unit, Business Unit, Time Zone

(time offset from UTC/GMT), Observes Daylight Savings, and/or Minimum Separation Between Consecutive Shifts, and then click on the *OK* icon button to save the changes. Click on the *Cancel* icon button to discard the changes.

Environment	Organizational Unit	Business Unit	Time Zone GMT Offset	Observes Daylight Savings	Min. Time Between Shifts	Exclude From Scheduling	Action
US Operations	Dallas	US Operations	- 06:00	Yes	10 : 00	<input type="checkbox"/>	  

**Figure 4.12 - Edit Organizational Unit**

#### 4.4.4. Delete Organizational Unit

To delete an Organizational Unit, click on the *Delete* icon button in the corresponding row within the *Manage Organizational Unit* module. The user will be prompted to confirm his or her decision before the record is removed from the system.

*Warning: Other items such as streams are linked to the organizational units. Therefore, deleting organizational units that are being used may make the other Environment units not defined.*

### 4.5. Contact Groups

A Contact Group is used to represent a group of Streams. A Contact Group must belong to a single Environment. The *Manage Contact Groups* module provides functionality to manage the configuration of Contact Groups within the database.

#### 4.5.1. Manage Contact Groups

The *Manage Contact Groups* module (Figure 4.13) lists the Contact Groups currently configured in the database. The user may filter the Contact Groups by Environment by selecting an Environment from the *Select Environment* drop-down menu.

**Manage Contact Groups**

Select Environment: (All Environments) ▼

Environment	Contact Group	Service Profile	Backoffice Profile	Action
Model 1	.Sales	.80% in 20 secs		
Model 1	.Support	.80% in 20 secs		
Model Other	Billing_ABC	.80% in 20 secs		
.Model Customer Service	CS	.80% in 20 secs only		
.Model Customer Service	CS2			
HRZ Inbound-Outbound	DI CHAT	90/30 Abn 1% ACD		
HRZ Inbound-Outbound	DI PHONE	85/300 Abn 3% ACD		
HRZ Inbound-Outbound	Email			
HRZ Inbound-Outbound	GS CHAT	90/30 Abn 1% ACD		
HRZ Inbound-Outbound	GS PHONE	85/300 Abn 3% ACD		
HRZ Inbound-Outbound	Outbound - Billing			
HRZ Inbound-Outbound	Outbound - Reach			
HRZ Inbound-Outbound	Outbound - Retention			
.Model Customer Service	Outbound Test(AA)			
HRZ Inbound-Outbound	PF CHAT	90/30 Abn 1% ACD		
HRZ Inbound-Outbound	PF PHONE	85/300 Abn 3% ACD		
Model Other	Repairs&Returns_SAC	80/180 1.5/25		
Model Other	Retention_DR	80/180 1.5/25		
Model Other	Sales_FS	.80% in 20 secs		
HRZ Inbound-Outbound	SB CHAT	90/30 Abn 0.5% ACD		
Teletech	Teletech	.80% in 20 secs		
Technical Support	TS-AT			
Technical Support	TS-DT			
Technical Support	TS-ST			
Model Other	WarrantyClaims_RAC	Max Ab 2%		
.Model Customer Service	WOMR Phone			
Model 1	zInt'l Sales	.80% in 20 secs		
Model 1	zInt'l Support	.80% in 20 secs		

Figure 4.13 - Manage Contact Groups

#### 4.5.2. Add New Contact Group

The *Add New Contact Group* area (Figure 4.14) is used to add a new Contact Group to the database. A Name, Environment and Service Profile should be specified. Click on the *Add New Contact Group* button to save the new Contact Group.

**Add New Contact Group**

Environment: DL Direct ▼ Contact Group Name:  Service Profile: (None) ▼ **Add New Contact Group**

Figure 4.14 - Add New Contact Group

### 4.5.3. Edit Contact Group

To edit a Contact Group, click on the *Edit* icon button in the corresponding row in the *Manage Contact Group* module. Modify the Environment from the drop-down menu and/or the Contact Group Name field, and then click on the *OK* icon button to save the changes. Click *Cancel* to discard the changes.

### 4.5.4. Delete Contact Group

To delete a Contact Group, click on the *Delete* icon button in the corresponding row in the *Manage Contact Group* module. The user will be prompted to confirm his or her decision before the record is removed from the system.

*Warning: One or more streams may be assigned to a Contact Group. When a Contact Group is deleted, its streams must be reassigned to other Contact Group. Otherwise, these streams will not be considered for forecasting or scheduling.*

## 4.6. Streams

A Stream belongs to a particular contact type. A Stream must also be assigned to one Organizational Unit. The *Manage Streams* module provides functionality to manage the configuration of Streams in the database.

### 4.6.1. Manage Streams

The *Manage Streams* module (Figure 4.15) lists the Streams currently configured within the database. The user may filter the Streams by Environment by selecting an Environment from the *Select Environment* drop-down menu. One may also filter Streams by Contact Group, by selecting a Contact Group from the *Select Contact Group* drop-down menu. The fields displayed in this module are described in section 4.6.2 below. Some of the fields are specific to either the Scheduler or the Forecaster, and will not appear if the particular module is not installed.



Environment	Contact Group	Organizational Unit	Stream Profile	Stream	Description	Virtual Stream	Bucket Size	Action
US Operations	Billing	Jacksonville	Call Stream Profile	Billing S1	Billing S1	No	30 Minutes	 

Figure 4.15 - Manage Streams

### 4.6.2. Add New Stream

Use the *Add New Stream* area (Figure 4.16) to add a new Stream to the database. Fill in the appropriate fields, and then click *Add New Stream* to save the new Stream. The following table details the fields found in the *Add New Stream* area.

Field	Description
<b>Environment</b>	Environment to which this Stream belongs
<b>Contact Group</b>	Contact Group to which this Stream is assigned
<b>Organizational Unit</b>	Organizational Unit to which this Stream is assigned
<b>Stream Name</b>	Name of the Stream
<b>Description</b>	Description for the Stream



<b>Stream Profile</b>	Profile that describes the type of data for this Stream
<b>Data Bucket Size</b>	Size (in minutes) of data bucket for Stream data
<b>Virtual Stream</b>	Equals "Yes" if this is a Virtual Stream, and "No" otherwise

**Figure 4.16 - Add New Stream**

A Virtual Stream is a stream defined solely for the purpose of allowing agents assigned to an Organizational Unit to handle calls from the streams belonging to Contact Groups other than their primary contact group in a Skills-based environment. Such streams are not considered when meeting minimum agent requirements.

The *Stream Profile* and *Data Bucket Size* settings are available only when the Forecaster is installed. The data bucket size must correspond to the bucket size of the data imported into the stream.

### 4.6.3. Edit Stream

To edit a Stream, click on the *Edit* icon button in the corresponding row in the *Manage Stream* module. Modify the desired fields, and then click on the *Save Stream* button to save the changes. Click *Cancel* to discard the changes.

**Figure 4.17 - Edit Stream**

## 4.6.4. Delete Stream

To delete a Stream, click on the *Delete* icon button in the corresponding row in the *Manage Stream* module. The user will be prompted to confirm his or her decision before the record is removed from the system. There will be two confirmation messages: the first will ask for confirmation that the user's intention is to delete the stream; the second will remind the user that all of the corresponding stream data will be deleted, and give the user a second chance to abort the delete process.

## 4.7. Stream Profiles

A Stream is used to represent a particular contact type. A Stream must be assigned to one Contact Group and one Organizational Unit. The *Manage Stream Profiles* module provides functionality to manage the configuration of Streams in the database.

### 4.7.1. Manage Stream Profiles

The *Manage Stream Profiles* module (Figure 4.18) lists the Stream Profiles currently configured within the database.





















Manage Stream Profiles				
Profile	Stream Type	Requirements Type	Scheduling Type	Action
Call Stream	Interval Arrival Records	Call Forecasts	Requirements	 
Contact Center	Interval Arrival Records	Call Forecasts	Requirements	 
Outbound	Upstream Forecasts	Call Forecasts	Requirements	 
BackOffice	Interval Arrival Records	Multimedia Forecasts	Requirements	 
email/fax	Raw Arrival Records	Multimedia Forecasts	Requirements	 
Email stream profile	Interval Arrival Records	Multimedia Forecasts	Requirements	 
Outbound	Upstream Forecasts	Call Forecasts	Requirements	 
Outbound Test(AA)	Outbound Forecasts	Outbound Requirements	Requirements	 
Outbound 2	Outbound Forecasts	Outbound Requirements	Requirements	 
Backoffice Stream Profile bfa	Interval Arrival Records	Backoffice	Requirements	 

Figure 4.18 - Manage Stream Profiles

### 4.7.2. Add New Stream Profile

Use the *Add New Stream Profile* area (Figure 4.19) to add a new Stream Profile to the database. Fill in the appropriate fields, and then click *Add New Stream Profile* to save the new Stream Profile.

The following table details the fields found in the *Add New Stream* area. LWFm stands for Legacy WFM software.

Field	Description	Options
<b>Stream Type</b>	Type of Data in the Stream	Raw Arrival Records, Interval Arrival Records, Upstream Forecasts and Outbound Forecasts
<b>Requirements Types</b>	Method used to generate Agent Requirements	Call Forecasts, LWFm Forecasts, Multimedia Forecasts and Outbound Forecasts
<b>Scheduling Type</b>	Source generating Agent Requirements to Schedule Agents	Requirements and LWFm Requirements
<b>Name</b>	Name of the Stream Profile	

Figure 4.19 - Add New Stream Profile

### 4.7.3. Edit Stream Profile

To edit a Stream Profile, click on the *Edit* icon button in the corresponding row in the *Manage Stream Profile* module. Modify the desired fields, and then click on the *OK* icon button to save the changes. Click *Cancel* to discard the changes.































Manage Stream Profiles				
Profile	Stream Type	Requirements Type	Scheduling Type	Action
Call Stream	Interval Arrival Records	Call Forecasts	Requirements	  
Contact Center	Interval Arrival Records	Call Forecasts	Requirements	  
Outbound	Upstream Forecasts	Call Forecasts	Requirements	  
BackOffice	Interval Arrival Records	Multimedia Forecasts	Requirements	  
email/fax	Raw Arrival Records	Multimedia Forecasts	Requirements	  
Email stream profile	Interval Arrival Records	Multimedia Forecasts	Requirements	  
Outbound	Upstream Forecasts	Call Forecasts	Requirements	  
Outbound Test(AA)	Outbound Forecasts	Outbound Requirements	Requirements	  
Outbound 2	Outbound Forecasts	Outbound Requirements	Requirements	  
Backoffice Stream Profile bfa	Interval Arrival Records	Backoffice	Requirements	  

Figure 4.20 - Edit Stream Profile

### 4.7.4. Delete Stream Profile

To delete a Stream Profile, click on the *Delete* icon button in the corresponding row in the *Manage Stream Profile* module. The user will be prompted to confirm his or her decision before the record is removed from the system. There will be two confirmation messages: the first will ask for confirmation that the user's intention is to delete the stream; the second will remind the user that all of the corresponding stream data will be deleted, and give the user a second chance to abort the delete process.

## 5. Tour Groups

The *Tour Groups* module handles the management of the Tour Groups and Shift Templates in the system.

### 5.1. Tour Groups

The *Tour Groups* module provides functionality to configure Tour Groups within the System. The Tour Groups define weekly work patterns for the agents.

#### 5.1.1. Manage Tour Groups

The *Manage Tour Groups* module (Figure 5.1) lists the Tour Groups currently configured within the System.





















Tour Group	Minimum Days	Maximum Days	Minimum Consecutive Days off	Consistent Starts			Mixed Templates	Weekend Days off		Shift Templates	Action
				Shifts	Breaks	Lunches		Minimum	Maximum		
3x8	3	3	0	No	No	No	No	0	2	8HR	 
4x10	4	4	0	No	No	No	No	0	2	10HR	 
4x10AM ATL	4	4	2	Yes	No	No	No	1	2	10HR	 
4x10MN ATL	4	4	2	Yes	No	Yes	No	1	2	10HR	 
4x10PM ATL	4	4	3	Yes	Yes	Yes	Yes	1	2	10HR	 
4x6	4	4	0	No	No	No	No	0	2	6HR	 
5x8	5	5	0	No	No	No	No	0	2	8HR	 
5x8AM	5	5	1	Yes	Yes	Yes	No	1	1	8HR	 
5x8MN	5	5	2	Yes	No	Yes	No	1	2	8HR	 
5x8PM	5	5	1	Yes	No	Yes	No	1	1	8HR	 

Figure 5.1- Manage Tour Groups

#### 5.1.2. Add New Tour Group

The *Add New Tour Group* area (Figure 5.2) can be used to add a new Tour Group to the system. One must provide a name for the Tour Group. Minimum Workdays, Maximum Workdays, Minimum Consecutive Days Off, Consistent Start Times, and Minimum and Maximum Weekend Days Off can be selected from the drop-down boxes. Click on the *Add New Tour Group* button to save the new Tour Group.

Add New Tour Group									
Tour Group:	Minimum Days:	Maximum Days:	Minimum Consecutive Days Off:	Consistent Starts:	Consistent Break Starts:	Consistent Lunch Starts:	Mixed Template:		
<input type="text"/>	0	1	0	No	No	No	No		
Minimum Weekend Days Off:			Maximum Weekend Days Off:	Default Shift:					
0			0	(Unassigned)					
<input type="button" value="Add New Tour Group"/>									

Figure 5.2 - Add New Tour Group

#### 5.1.3. Edit Tour Group

To edit a Tour Group, click on the *Edit* icon button in the corresponding row (Figure 5.3) within the *Manage Tour Groups* module. Modify the Tour Group Name, Minimum

Consecutive Days Off, Consistent Start Times, Mixed Templates, Minimum Workdays and Maximum Workdays. Click the *Save* button to save the changes.

New Shift Templates can be assigned to a Tour Group using the *Add New Shift Template* area in the *Edit Tour Group* page. Add new Shift Templates by selecting them from the drop-down menu, and then clicking on the *Add New Shift* button (Figure 5.3). The user can delete one or more of the assigned Shift Templates by clicking on the *Delete* icon button next to the Shift Template.

**Edit Tour Group**

Update Tour Group Cancel

Tour Group: 3x8 Minimum Days: 3  
 Consistent Starts: No Maximum Days: 3  
 Consistent Break Starts: No Minimum Consecutive Days Off: 0  
 Consistent Lunch Starts: No Minimum Weekend Days Off: 0  
 Mixed Templates: No Maximum Weekend Days Off: 2

**Tour Group Shift Templates**

Tour Group Name	Shift Template Name	Minimum Days	Maximum Days
3x8	8HR	3	3

**Add New Shift Template**

Shift Template Name: 10HR Minimum Days: 0 Maximum Days: 0 Add New Shift

Figure 5.3 - Edit Tour Groups

### 5.1.4. Delete Tour Group

To delete a Tour Group, click on the *Delete* icon button in the corresponding row within the *Manage Tour Groups* module. The user will be prompted to confirm his or her decision before the record is removed from the system.

### 5.1.5. Advanced Tour Groups

The *Advanced Mixed Templates* option on the *Mixed Template* drop-down can be used to configure a tour group to generate schedules with different daily durations. It also allows the user include two or more shift templates and specify the number of days to schedule with each to create schedules with varying daily shift schedules.

This is done by selecting *Advanced* from the *Mixed Template* drop-down list on the *Edit Tour Group* page, as shown in Figure 5.4. It allows the user to specify which days of the week a template is to be used, consistent or non-consistent start times and is limited by the number of days to be worked (Tour Days).

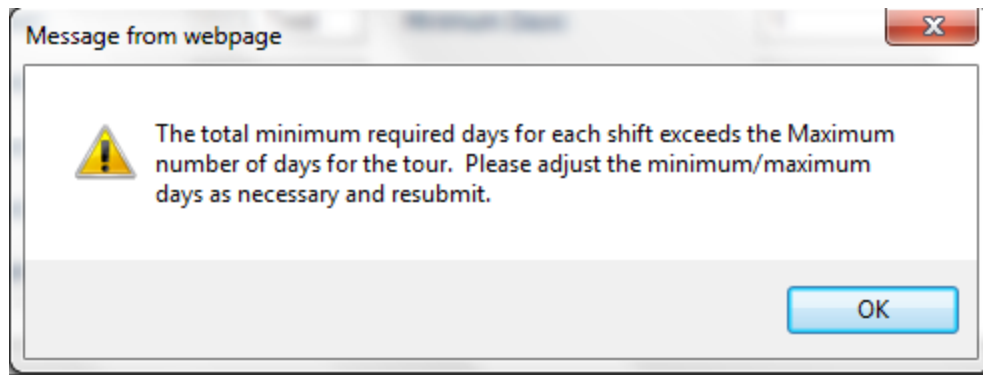
*Warning: It is the users' responsibility to configure a tour group that will not generate infeasible schedules. This is accomplished by ensuring that the earliest/latest start times specified for different templates will allow sufficient rest time between successive shifts. The*

user must make sure that the latest start plus shift duration will not result in overlapping shifts on successive days. Overlapping shifts may naturally generate infeasible schedules and incorrect results.

Consistent Starts in top box does not overwrite consistent start in template section. So if the template section is not checked and top is set to yes, schedules created may not have consistent start times.

**Figure 5.4 – Edit Tour Group**

If the total minimum required days for each shift exceeds the maximum number of days for the tour group a warning message to adjust the minimum/maximum will be displayed (Figure 5.5)



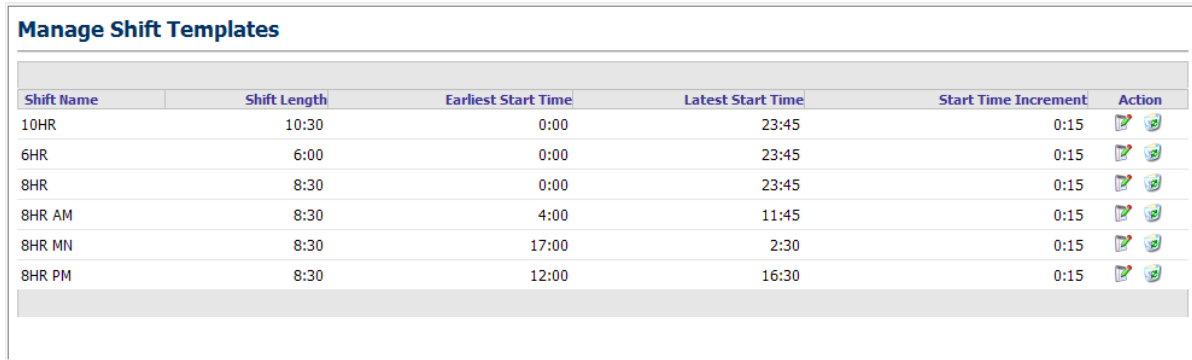
**Figure 5.5 – Warning Message Min/Max**

## 5.2. Shift Templates

The Shift Templates module provides functionality to configure Shift Templates within the System. Shift Templates define daily work patterns for agents.

### 5.2.1. Manage Shift Templates

The *Manage Shift Templates* module (Figure 5.6) lists the Shift Templates currently configured within the System.















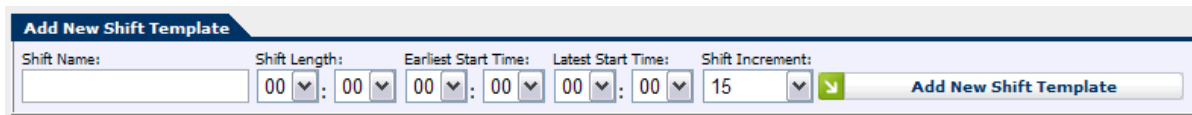
Shift Name	Shift Length	Earliest Start Time	Latest Start Time	Start Time Increment	Action
10HR	10:30	0:00	23:45	0:15	 
6HR	6:00	0:00	23:45	0:15	 
8HR	8:30	0:00	23:45	0:15	 
8HR AM	8:30	4:00	11:45	0:15	 
8HR MN	8:30	17:00	2:30	0:15	 
8HR PM	8:30	12:00	16:30	0:15	 

Figure 5.6 - Manage Shift Templates

### 5.2.2. Add New Shift Template

The *Add New Shift Template* area (Figure 5.7) can be used to add a new Shift Template to the system. A Name, Shift Length, Earliest Start Time, Latest Start Time and Shift Increment should be provided to define a new Shift Template. To configure a Shift Template to have no earliest and latest start time limitation, select *0:00* for earliest and latest start times. Click on the *Add New Shift Template* button to save the new Shift Template.



**Add New Shift Template**

Shift Name:

Shift Length: 00 : 00

Earliest Start Time: 00 : 00

Latest Start Time: 00 : 00


Shift Increment: 15 

Figure 5.7 - Add New Shift Template

When selecting the 5 minute shift increment option a caution message will be displayed as this option may result in longer run times in Scheduler (Figure 5.8). This message will also be displayed when editing a shift template.

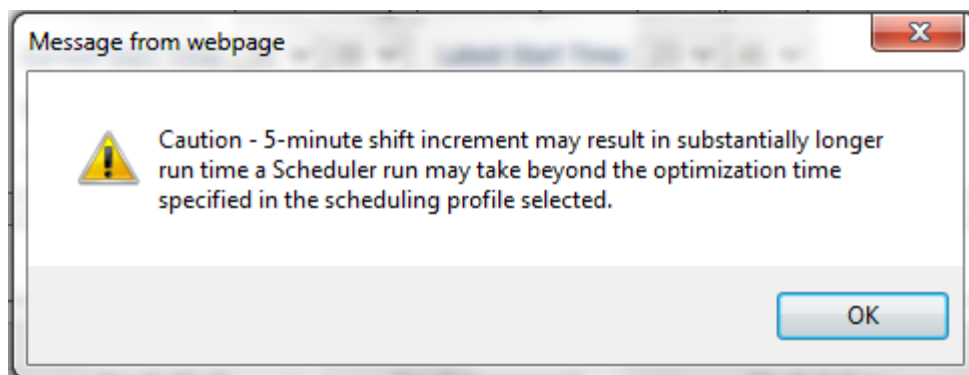


Figure 5.8 – Caution – 5-minute shift increment

### 5.2.3. Edit Shift Template

To edit a Shift Template, click on the *Edit* icon button in the corresponding row within the *Manage Shift Templates* module. The user can modify the Shift Name, Shift Length, Earliest Start Time, Latest Start Time and Shift Increment. Breaks can be added using the Add New Break module. Existing breaks can be edited or deleted using the *Edit* or *Delete* icon buttons in the corresponding row. The ACD AUX Code drop-down list is controlled by the AUX codes defined in the ACD Profile.

Shift Name	Break Length	Break Start	Break Slack	Break Increment	Work Before ACD Aux Code	Action
ATG-8XS	0:15	1:30	1:00	0:15	0:00 ACD01: Break	
ATG-8XS	0:30	3:30	1:00	0:15	0:00 ACD01: Lunch	
ATG-8XS	0:15	5:30	1:00	0:15	0:00 ACD01: Break	

Break Length	Break Start	Break Slack	Break Increment	Work Before	Aux Code Assignment	Action
00:15	05:30	01:00	15 minutes	00:00	ACD01 Break	Add New Shift Break

Figure 5.9 - Edit Shift Templates

### 5.2.4. Delete Shift Template

To delete a Shift Template, click on the *Delete* icon button in the corresponding row within the *Manage Shift Templates* module. The user will be prompted to confirm his or her decision before the record is removed from the system.



## 6. Operating Hours

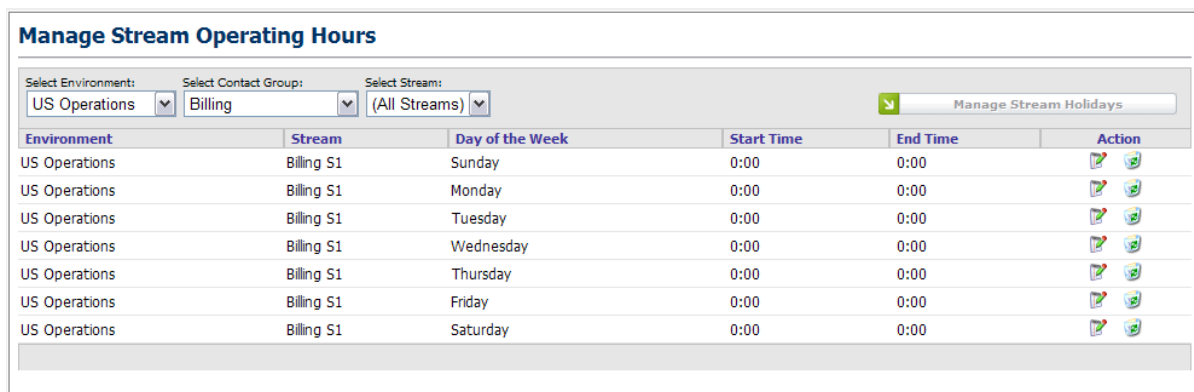
The *Operating Hours* module handles the management of the Organizational Unit and Stream operating hours.

### 6.1. Stream

The *Stream Operating Hours* module provides functionality for configuring the Operating Hours of a Stream within the system. The Stream Operating Hours define the hours of operation for a Stream. Each Stream must have one weekly set of Operating Hours.

#### 6.1.1. Manage Stream Operating Hours

The *Manage Stream Operating Hours* module (Figure 6.1) lists the Stream Operating Hours currently configured within the System. One may filter the Stream Operating Hours by Environment, by selecting an Environment from the *Select Environment* drop-down menu, and by Contact Group, by selecting a Contact Group from the *Select Contact Group* drop-down menu.



The screenshot displays the 'Manage Stream Operating Hours' interface. At the top, there are three dropdown menus: 'Select Environment' (set to 'US Operations'), 'Select Contact Group' (set to 'Billing'), and 'Select Stream' (set to '(All Streams)'). To the right of these menus is a 'Manage Stream Holidays' button. Below the filters is a table with the following columns: Environment, Stream, Day of the Week, Start Time, End Time, and Action. The table contains seven rows, each representing a day of the week with a start and end time of 0:00. The Action column for each row contains two icons: a pencil and a trash can.















Environment	Stream	Day of the Week	Start Time	End Time	Action
US Operations	Billing S1	Sunday	0:00	0:00	 
US Operations	Billing S1	Monday	0:00	0:00	 
US Operations	Billing S1	Tuesday	0:00	0:00	 
US Operations	Billing S1	Wednesday	0:00	0:00	 
US Operations	Billing S1	Thursday	0:00	0:00	 
US Operations	Billing S1	Friday	0:00	0:00	 
US Operations	Billing S1	Saturday	0:00	0:00	 

Figure 6.1 - Manage Stream Operating Hours

### 6.1.2. Add New Stream Operating Hours

The *Add New Stream Operating Hours* area (Figure 6.2) can be used to add a new Stream Operating Hours entry to the system. Selecting an Environment from the *Environment* drop-down menu automatically populates the *Contact Group* drop-down menu. Likewise, selecting a Contact Group from the *Contact Group* drop-down menu automatically populates the *Stream* drop-down menu. The user must select a Stream, a Day of the Week (or All Days to generate records for seven days of the week), and a Start and End Time. To configure a Stream to be open 24 hours, select 0:00 for both start and end times. Click Add New Stream Operating Hours to complete the addition.

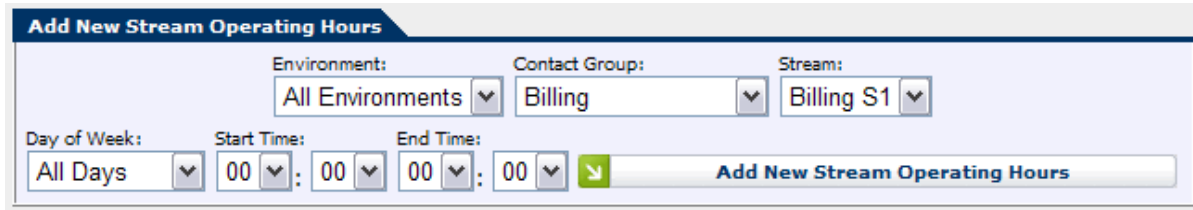


Figure 6.2 - Add New Stream Operating Hours

*Note: Operating hours for a Stream should be entered in the local time zone of the Organizational Unit that the Stream is assigned.*

### 6.1.3. Edit Stream Operating Hours

To edit a Stream Operating Hours entry, click on the *Edit* icon button in the corresponding row within the *Manage Stream Operating Hours* module. Modify the Start Time or End Time, and then click on the *OK* icon button to save the changes. Click on the *Cancel* icon button to discard the changes. To configure a stream to be closed, select *Closed* from the drop-down menu. To configure a stream to be open for 24 hours, select 0:00 for both start and end times.




Environment	Stream	Day of the Week	Start Time	End Time	Action
US Operations	Billing S1	Sunday	00:00	Open 00:00	  

Figure 6.3 - Edit Stream Operating Hours

### 6.1.4. Delete Stream Operating Hours

To delete a Stream Operating Hours entry, click on the *Delete* icon button in the corresponding row within the *Manage Stream Operating Hours* module. One will be prompted to confirm his or her decision before the record is removed from the system.

## 6.2. Organizational Unit

The *Organizational Unit Operating Hours* module provides functionality for configuring the Operating Hours of an Organizational Unit within the system. The Operating Hours define the hours of operation for an Organizational Unit. Each Organizational Unit must have one weekly set of Operating Hours.

## 6.2.1. Manage Organizational Unit Operating Hours

The *Manage Organizational Unit Operating Hours* module (Figure 6.4) lists the Operating Hours currently configured within the System. One may filter the Operating Hours by Environment, by selecting an Environment from the *Select Environment* drop-down menu. The user may also filter the Operating Hours by Business Unit and an Organizational Unit, by selecting a Business Unit and an Organizational Unit from the *Select Business Unit* and *Select Organizational Unit* drop-down menus.

Environment	Organizational Unit	Day of the Week	Start Time	End Time	Action
US Operations	Bombay	Sunday	0:00	0:00	
US Operations	Bombay	Monday	0:00	0:00	
US Operations	Bombay	Tuesday	0:00	0:00	
US Operations	Bombay	Wednesday	0:00	0:00	
US Operations	Bombay	Thursday	0:00	0:00	
US Operations	Bombay	Friday	0:00	0:00	
US Operations	Bombay	Saturday	0:00	0:00	

Figure 6.4 - Manage Operating Hours

## 6.2.2. Add New Operating Hours

The *Add New Operating Hours* form (Figure 6.5) can be used to add a new Operating Hours entry to the database. The user must select an Environment, an Organizational Unit, a Day of the Week (or All Days to generate records for seven days of a week), and a Start and End Time. Click on the *Add New Operating Hours* button to save the new record(s).

Field	Description
Environment	Environment for this Organizational Unit
Organizational Unit	Organizational Unit
Day of the Week	Day of the Week
Start Time	Time Organizational Unit Opens, specified in Hours and Minutes
End Time	Time Organizational Unit Closes, specified in Hours and Minutes

Figure 6.5 - Add New Operating Hours

*Note: Operating hours for an Organizational Unit should be entered in the local time zone of the Organizational Unit.*

### 6.2.3. Edit Operating Hours

To edit an Operating Hours entry, click on the *Edit* icon button in the corresponding row within the *Manage Operating Hours* module. Modify the Start Time or End Time, and then click on the *OK* icon button to save the changes. Click on the *Cancel* icon button to discard the changes. To configure an Organizational Unit to be closed on a day, select *Closed* from the drop-down list. To configure an Organizational Unit to be open 24 hours, select *0:00* for both start and end times.

Field	Description
Environment	Environment for this Organizational Unit ( <b>Not Editable</b> )
Organizational Unit	Organizational Unit ( <b>Not Editable</b> )
Day of the Week	Day of the Week ( <b>Not Editable</b> )
Start Time	Time Organizational Unit Opens, specified in Hours and Minutes
End Time	Time Organizational Unit Closes, specified in Hours and Minutes




Environment	Organizational Unit	Day of the Week	Start Time	End Time	Action
US Operations	Bombay	Sunday	00 : 00	Open 00 : 00	  

Figure 6.6 - Edit Operating Hours

### 6.2.4. Delete Operating Hours

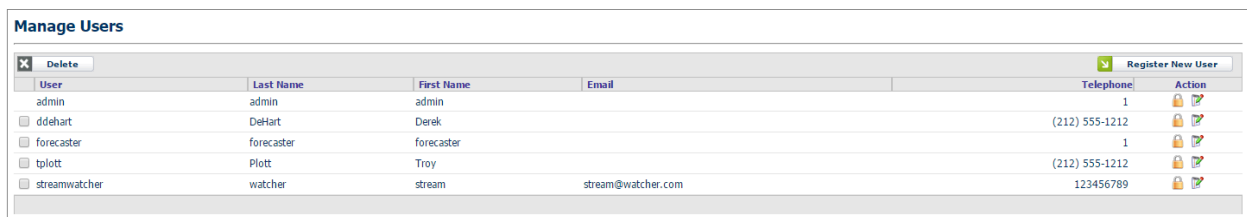
To delete an Operating Hours entry, click on the *Delete* icon button in the corresponding row within the *Manage Operating Hours* module. The user will be prompted to confirm his or her decision before the record is removed from the system.

## 7. Users

The *Users* module provides functionality for the management of User Information, Users' Roles and Access Rights, and Application Settings. This is the top-level unit where new users are added.

### 7.1. Manage Users

The *Manage Users* module provides functionality to configure and manage Website Users. This module should appear similar to as shown in Figure 7.1. Information about the users such as their names and email address may be administered using this module. From the *Manage Users* module, an administrator may edit a user's configuration, change a user's password, delete a user, or register a new user with the system.



The screenshot shows the 'Manage Users' interface. At the top left is a 'Delete' button with a trash icon. At the top right is a 'Register New User' button with a plus icon. Below these is a table with the following columns: 'User', 'Last Name', 'First Name', 'Email', 'Telephone', and 'Action'. The table contains five rows of user data. Each row has a checkbox on the left side of the 'User' column. The 'Action' column contains icons for edit and delete.











User	Last Name	First Name	Email	Telephone	Action
admin	admin	admin		1	 
<input type="checkbox"/> ddehart	DeHart	Derek		(212) 555-1212	 
<input type="checkbox"/> forecaster	forecaster	forecaster		1	 
<input type="checkbox"/> tploitt	Plott	Troy		(212) 555-1212	 
<input type="checkbox"/> streamwatcher	watcher	stream	stream@watcher.com	123456789	 

Figure 7.1 - Manage Users

### 7.1.1. Edit User

To edit a User, click on the *Edit* icon button in the corresponding row within the *Manage Users* module (Figure 7.2). The *Edit User* module will appear. An administrator may edit the User's information, including the user's first and last name, email address, telephone number, and user name in the *User Information* box. In the *User Role(s)* box, the user may be assigned any number of roles. The set of roles available depends on the features enabled in the website. Finally, in the *User Environment Assignment(s)* box, the user may be assigned any number of environments. A user that is assigned the Administrator role has access to all Environments. Changes to a User's configuration are not saved until the *Update* button is clicked. To return to the *Manage Users* module without saving any changes, click on the *Cancel* button. Navigating away from this page using the website menu also cancels any changes that may have been made since the last update.

**Edit User**

**User Information:**

First Name: Requirements Last Name: Runner Email Address: requirements@localhost

User Name: requirements Telephone Number: 732-583-1919

**User Role(s):**

Administrator  Forecaster  Supervisor  
 Agent  Manager  Vendor  
 demo  Scheduler  Viewer

**User Environment Assignment(s):**

Available Environments Assigned Environments

[Show Authorization](#)

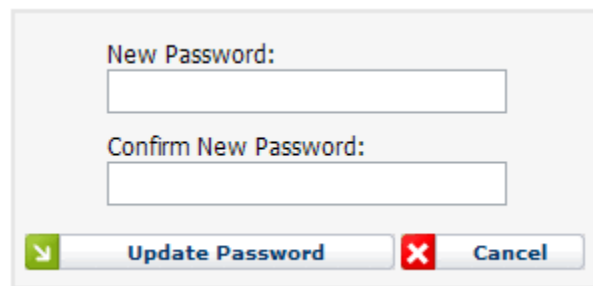
Figure 7.2 - Edit Users

### 7.1.2. Delete User

In the *Manage Users* module, one or more users may be deleted by marking the check box next to those users' names, and then pressing the *Delete* button. One will be prompted to confirm deletion before all runs and records for that user are permanently deleted from the system.

### 7.1.3. Change Password

Users may change their passwords using the *Change Password* module in the *Home* page. In the *Manage Users* module, an administrator can also change a user's password by selecting the *Update Password* button in the user's entry. To change the password, enter the new password into both the *New Password* and *Confirm New Password* fields and select the *Update Password* button. An Administrator is not required to know the user's current password in order to set it to a new value. To abort changing the password, select the *Cancel* button or simply navigate to another page.



The image shows a dialog box for changing a password. It has a light gray background and a thin border. At the top, the text "New Password:" is followed by a white text input field. Below that, the text "Confirm New Password:" is followed by another white text input field. At the bottom of the dialog, there are two buttons. The first button is labeled "Update Password" and has a green arrow icon on its left side. The second button is labeled "Cancel" and has a red X icon on its left side.

Figure 7.3 – Change Password

## 7.2. New User

A new user can be added from the *Administration* tab by selecting the *New User* page from the website menu, or by selecting the *New User* link from the *Manage Users* module.

The user's first and last name, e-mail address, telephone number, username and password can be added using the *New User* page (Figure 7.4). The user should be assigned a user role specifying the access privileges. The user can also be assigned one or more environments from the list of available environments.

### Register New User

**User Information:**

First Name:	Last Name:	Email Address:
<input type="text"/>	<input type="text"/>	<input type="text"/>
User Name:	Telephone Number:	
<input type="text"/>	<input type="text"/>	
Password:	Confirm Password:	
<input type="text"/>	<input type="text"/>	

**User Role(s):**

<input type="checkbox"/> Administrator	<input type="checkbox"/> Forecaster	<input type="checkbox"/> Supervisor
<input type="checkbox"/> Agent	<input type="checkbox"/> Manager	<input type="checkbox"/> Vendor
<input type="checkbox"/> demo	<input type="checkbox"/> Scheduler	<input type="checkbox"/> Viewer

**User Environment Assignment(s):**

Available Environments		Assigned Environments
<input type="text" value="US Operations"/>	<input type="button" value="Add +"/>	<input type="text"/>
	<input type="button" value="Remove -"/>	

[Show Authorization](#)

**Figure 7.4 - Register New User**



## 8. Roles

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### 8.1. Manage Roles

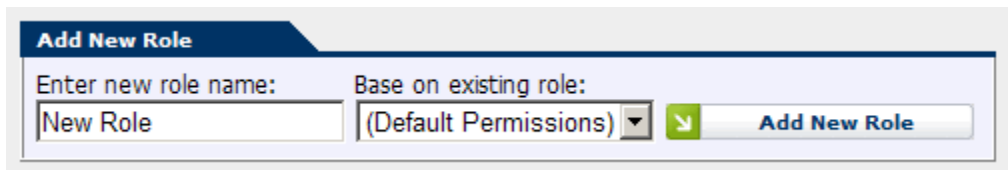
The *Manage Roles* module is used to manage the roles that will appear in the Users Role(s): box on the Register New Users form. This module requires Administrator access. Roles may be used to configure access to parts of the application, based on what permissions are assigned. Users may then be assigned roles to restrict or grant access as needed.

There are six classes of users who are standard in the Website. They are as follows:

- Administrators: These users are responsible for administering the Website, including configuring settings common to all Environments, managing and creating users, Forecast Requests, Planning Requests, and Schedule Requests. These users are also able to submit and manage requests, and view results and other data for any Environment.
- Forecaster: These users can submit forecast requests to the Website and manage those requests. They are assigned one or more Environments for which to manage forecast requests.
- Planner: These users can submit agent requirement requests to the Website and manage those requests. They are assigned one or more Environments for which to manage agent requirement requests.
- Schedulers: These users can submit schedule requests to the Website and manage those requests. They are assigned one or more for which to manage schedule requests.
- Managers: These users have the same privileges as the Forecasters and Schedulers. In addition, they are able to view and manage forecasts and schedules created by other users within the environments assigned to them. They can also manage Contact Groups, Streams, and Stream Hours, and also Stream data, within their assigned environments.
- Viewers: These users are given access to view the status of requests for Environments assigned to them and results, and other data. They cannot, however, submit requests.

### 8.2. Add New Role

Use the *Add New Role* form (Figure 8.1) to add a new role to the system. The user must provide a name and select a based on existing role from the drop-down box. Click on the *Add New Role* button to complete the addition.



The screenshot shows a web form titled "Add New Role". It features two input fields: "Enter new role name:" containing the text "New Role", and "Base on existing role:" which is a dropdown menu currently showing "(Default Permissions)". To the right of the dropdown is a green arrow button, and further right is a blue button labeled "Add New Role".

Figure 8.1 – Add New Role

### 8.3. Edit Permissions

Selecting the *Edit* link for a particular role allows editing permissions for the role, as is shown in Figure 8.2. Permissions are organized in a hierarchical fashion, similarly to the structure of the application menu. Permissions may be checked or unchecked as necessary. When finished configuring permissions, the user may select the Update button to save changes to the database.

Editing Permissions for Capacity Planner role:														
Categories	Create	View	Edit	Delete	Copy	Upload	List Others	View Others	Edit Others	Delete Others	Transfer	Transfer Others	Make Official	Administrator
<input type="checkbox"/> Administration														
<input type="checkbox"/> Database														
<input type="checkbox"/> Homepage														
<input type="checkbox"/> Planning														
<input type="checkbox"/> Capacity Planner														
<input type="checkbox"/> Inputs/Assumptions														
Configure Data Items		<input type="checkbox"/>	<input type="checkbox"/>											
Site Allocation Tables	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>											
Site Data		<input type="checkbox"/>	<input type="checkbox"/>											
Site Data - Administrative		<input type="checkbox"/>	<input type="checkbox"/>											
<input type="checkbox"/> Reports														
Capacity Report Viewer		<input type="checkbox"/>	<input type="checkbox"/>											
Configure Capacity Reports		<input type="checkbox"/>	<input type="checkbox"/>											
Export Forecasts		<input type="checkbox"/>												
<input type="checkbox"/> Forecaster														
<input type="checkbox"/> Planner														
<input type="checkbox"/> Profiles														
Requirement Runs	<input checked="" type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Upload Forecasts						<input type="checkbox"/>								
<input type="checkbox"/> Scheduler														

Figure 8.2 – Edit permissions

### 8.4. Delete a Role

To delete a *Role* check the box to the left of the role and click on the *Delete* button. The user will be prompted to confirm the delete.

## 9. Audit

For users with Administrator access the *Audit* module provides an auditing report detailing activities by the Website users. To display the Audit module, the user should select the *User Action Log* link under the *Administration -> Audit* menu item.

### 9.1. User Action Log

The *User Action Log* page displays the list of logged records as shown in Figure 9.1. On this page, the user can filter by user name and download records for a specified date range. The *User Action Log* choice appears in the *Administration -> Audit* menu.

User Action Log						
User: (All Users)		Start Date: 11/17/2008	End Date: 11/18/2008	Refresh	Download	
Action Date	User	Site	Audit Type	Page Name	Note	
11/17/2008 12:21	Admin, Demo	Portal	Login	Login	User logged in	
11/17/2008 12:06	Admin, Demo	Portal	Login	Login	User logged in	
11/17/2008 12:02	Admin, Demo	Portal	Login	Login	User logged in	
11/17/2008 11:27	Admin, Demo	Portal	Delete Special Event Type	Portal Update Special Events Data	Deleted special event named [Boxing]	
11/17/2008 11:27	Admin, Demo	Portal	Delete Special Event Type	Portal Update Special Events Data	Deleted special event named [WWE]	
11/17/2008 11:27	Admin, Demo	Portal	Delete Special Event Type	Portal Update Special Events Data	Deleted special event named [Test]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [RGU-SE-L1]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [RGU-SE]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [RGU-NESE-HSI]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [RGU-NE-L1]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [RGU-NE]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [Reg3]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [Reg2]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [No. of Policy Holders]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [Reg1]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [PC-HDH_55]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [PC-DISP_INC]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [PC-CDH_76]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [PC-CDH_66]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [PC-AC_SAT]	
11/17/2008 11:26	Admin, Demo	Portal	Delete Regression Indicator	Portal Manage Regression Indicators	Deleted regression indicator [All Products RGU]	

Figure 9.1 User Action Log

### 9.2. Download User Action Log

The *User Action Log* reports can be downloaded into an Excel spreadsheet by clicking the *Download* button. Upon downloading and opening the file, this file should appear as shown in Figure 9.2.

Microsoft Excel - UserAuditLog\_11\_20\_2008-11\_27\_2008[1].csv

File Edit View Insert Format Tools Data Window Help

Reply with Changes... End Review...

Arial 10 B I U

C3 Portal

	A	B	C	D	E	F	G
1	Action Date	User	Site	Audit Type	Page Name	Note	
2	11/27/2008 21:25	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.112]	
3	11/27/2008 20:27	Admin, Demo	Portal	Logout	Logout	User logged out	
4	11/27/2008 20:26	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.112]	
5	11/27/2008 11:33	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.106]	
6	11/26/2008 20:28	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.114]	
7	11/26/2008 16:39	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.105]	
8	11/26/2008 16:37	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.104]	
9	11/26/2008 15:45	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.104]	
10	11/26/2008 15:41	Admin, Demo	Portal	Submit New Requirer	New Requirement	User submitted new requirements run (TEST)	
11	11/26/2008 15:37	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.105]	
12	11/26/2008 15:04	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.101]	
13	11/26/2008 15:00	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.104]	
14	11/26/2008 12:26	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.101]	
15	11/26/2008 10:45	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.105]	
16	11/25/2008 22:07	Larsen, Cathy	Portal	Logout	Logout	User logged out	
17	11/25/2008 21:58	Larsen, Cathy	Portal	Login	Login	User logged in from [192.168.20.118]	
18	11/25/2008 21:58	Admin, Demo	Portal	Logout	Logout	User logged out	
19	11/25/2008 21:25	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.118]	
20	11/25/2008 21:25	Larsen, Cathy	Portal	Logout	Logout	User logged out	
21	11/25/2008 21:21	Larsen, Cathy	Portal	Login	Login	User logged in from [192.168.20.118]	
22	11/25/2008 21:21	Larsen, Cathy	Portal	Logout	Logout	User logged out	
23	11/25/2008 21:19	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.116]	
24	11/25/2008 20:43	Larsen, Cathy	Portal	Login	Login	User logged in from [192.168.20.118]	
25	11/25/2008 20:42	Admin, Demo	Portal	Logout	Logout	User logged out	
26	11/25/2008 20:42	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.118]	
27	11/25/2008 20:41	Admin, Demo	Portal	Logout	Logout	User logged out	
28	11/25/2008 20:40	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.118]	
29	11/25/2008 20:40	Admin, Demo	Portal	Logout	Logout	User logged out	
30	11/25/2008 20:38	Admin, Demo	Portal	Login	Login	User logged in from [192.168.20.118]	

Ready

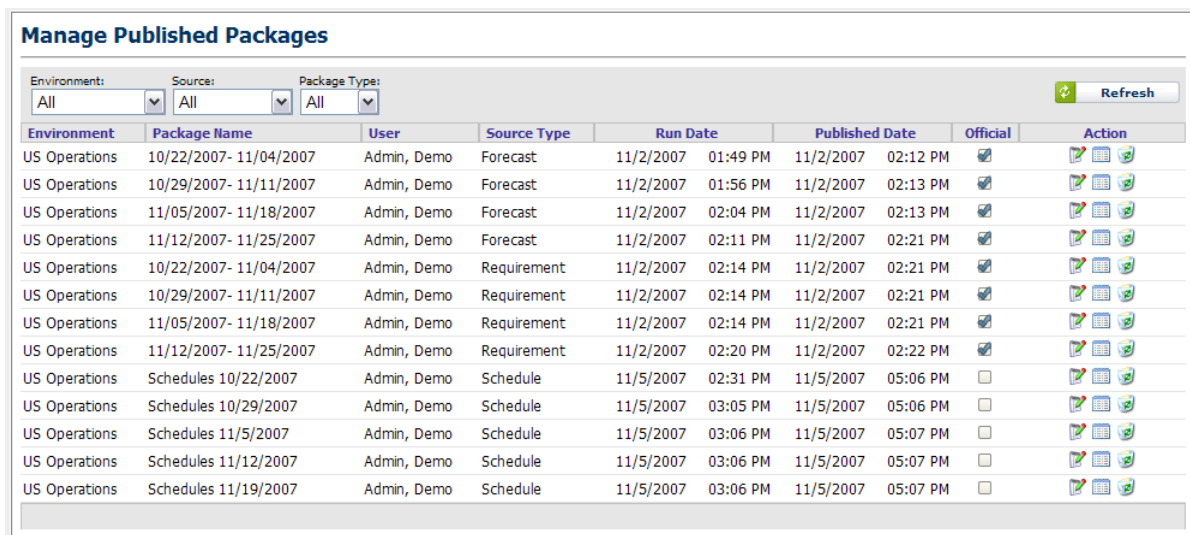
Figure 9.2 Download User Action Log

## 10. Operations

The *Operations* module handles the management of published packages, manage tags, uploading stream data, occupancy/shrinkage profiles, raw ACD data, and reports. The details of each module are discussed in this section of the manual.

### 10.1. Published Packages

The Published Packages module is available to users with Administrator or Manager access levels only, and enables the management of published forecast packages. The module appears as in Figure 10.1, below.



Environment	Package Name	User	Source Type	Run Date	Published Date	Official	Action
US Operations	10/22/2007- 11/04/2007	Admin, Demo	Forecast	11/2/2007 01:49 PM	11/2/2007 02:12 PM	<input checked="" type="checkbox"/>	
US Operations	10/29/2007- 11/11/2007	Admin, Demo	Forecast	11/2/2007 01:56 PM	11/2/2007 02:13 PM	<input checked="" type="checkbox"/>	
US Operations	11/05/2007- 11/18/2007	Admin, Demo	Forecast	11/2/2007 02:04 PM	11/2/2007 02:13 PM	<input checked="" type="checkbox"/>	
US Operations	11/12/2007- 11/25/2007	Admin, Demo	Forecast	11/2/2007 02:11 PM	11/2/2007 02:21 PM	<input checked="" type="checkbox"/>	
US Operations	10/22/2007- 11/04/2007	Admin, Demo	Requirement	11/2/2007 02:14 PM	11/2/2007 02:21 PM	<input checked="" type="checkbox"/>	
US Operations	10/29/2007- 11/11/2007	Admin, Demo	Requirement	11/2/2007 02:14 PM	11/2/2007 02:21 PM	<input checked="" type="checkbox"/>	
US Operations	11/05/2007- 11/18/2007	Admin, Demo	Requirement	11/2/2007 02:14 PM	11/2/2007 02:21 PM	<input checked="" type="checkbox"/>	
US Operations	11/12/2007- 11/25/2007	Admin, Demo	Requirement	11/2/2007 02:20 PM	11/2/2007 02:22 PM	<input checked="" type="checkbox"/>	
US Operations	Schedules 10/22/2007	Admin, Demo	Schedule	11/5/2007 02:31 PM	11/5/2007 05:06 PM	<input type="checkbox"/>	
US Operations	Schedules 10/29/2007	Admin, Demo	Schedule	11/5/2007 03:05 PM	11/5/2007 05:06 PM	<input type="checkbox"/>	
US Operations	Schedules 11/5/2007	Admin, Demo	Schedule	11/5/2007 03:06 PM	11/5/2007 05:07 PM	<input type="checkbox"/>	
US Operations	Schedules 11/12/2007	Admin, Demo	Schedule	11/5/2007 03:06 PM	11/5/2007 05:07 PM	<input type="checkbox"/>	
US Operations	Schedules 11/19/2007	Admin, Demo	Schedule	11/5/2007 03:06 PM	11/5/2007 05:07 PM	<input type="checkbox"/>	

Figure 10.1 – Manage Published Packages

#### 10.1.1. Edit Published Package

Selecting the *Edit* icon button will enable editing for a particular published package. The only fields that can be edited are the Package Name and Official status.

#### 10.1.2. Delete Published Package

Selecting the *Delete* icon button will remove the published package from the system. Note that deleting the published package does not delete the underlying forecast run. Once the published package referencing a forecast run is deleted, the forecast run itself may be deleted through the *Manage Forecasts* module.

### 10.2. Manage Tags

The *Manage Tags* module is used to define tags that can be attached to a Forecast Run as shown in Figure 10.2. This tag is then used to combine environments into one report on the Export Forecasts and Forecast Accuracy Report.















Manage Tags	
Tag Name	Action
Approved	 
Budget	 
Delivered	 
IDP	 
New Hires	 
Pending	 
Shift Bid	 

Figure 10.2 Manage Tags

### 10.2.1. Add New Tag

Use the *Add New Tag* form (Figure 10.3) to add a new tag to the system. The user must provide a name. Click on the *Add New Tag* button to complete the addition.

Add New Tag

Enter Name:

↓

Figure 10.3 Add New Tag

### 10.2.2. Edit Tag

To edit a Tag entry, click on the *Edit* icon button in the corresponding row within the *Manage Tags* module. Modify the Tag Name, and then click on the *OK* icon button to save the changes. Click on the *Cancel* icon button to discard the changes. Shown in Figure 10.4


Manage Tags	
Tag Name	Action
Approved	 
Budget	 
<input style="width: 80px;" type="text" value="Delivered"/>	<input checked="" type="checkbox"/>   
IDP	 
Pending	 
Shift Bid	 

Figure 10.4 Edit Tag

### 10.2.3. Delete Tag

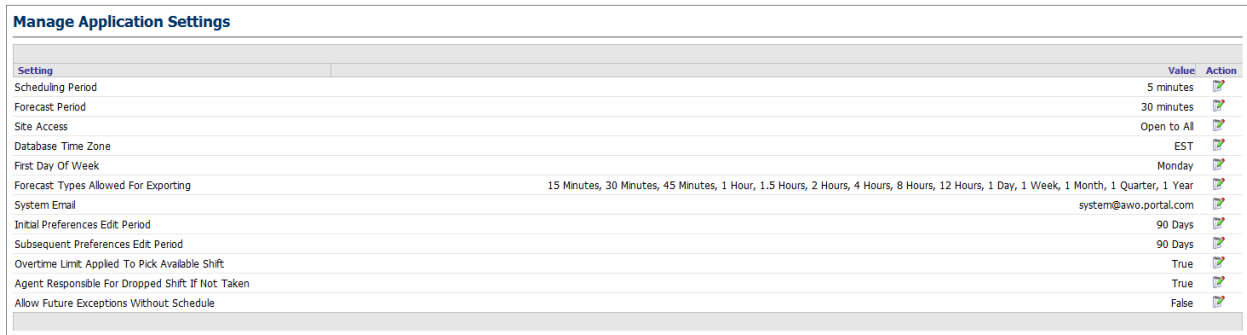
To delete a *Tag*, check the box to the left of the role and click on the *Delete* button. The user will be prompted to confirm the decision.

# 11. System Settings

The *System Settings* module handles the management of the application settings and manages companies. The details of each module are discussed in this section of the manual.

## 11.1. Application Settings

The *Application Settings* module is available to users with Administrator access level only, and enables configuration of application-wide settings. It should appear similar to as shown in Figure 11.1.



Setting	Value	Action
Scheduling Period	5 minutes	
Forecast Period	30 minutes	
Site Access	Open to All	
Database Time Zone	EST	
First Day Of Week	Monday	
Forecast Types Allowed For Exporting	15 Minutes, 30 Minutes, 45 Minutes, 1 Hour, 1.5 Hours, 2 Hours, 4 Hours, 8 Hours, 12 Hours, 1 Day, 1 Week, 1 Month, 1 Quarter, 1 Year	
System Email	system@awo.portal.com	
Initial Preferences Edit Period	90 Days	
Subsequent Preferences Edit Period	90 Days	
Overtime Limit Applied To Pick Available Shift	True	
Agent Responsible For Dropped Shift If Not Taken	True	
Allow Future Exceptions Without Schedule	False	

Figure 11.1 - Manage Application Settings

### 11.1.1. Configuring Settings

The Application Settings module allows Administrators to configure four parameters described in the following sections.

#### 11.1.1.1. Forecasting Period

The *Forecasting Period* is the length (in minutes) of the default time period used by the forecasting service. It must be configured by the Administrator to match the value being used by the forecasting service.

#### 11.1.1.2. Scheduling Period

The *Scheduling Period* is the length (in minutes) of the smallest unit of time with which the Scheduler should generate schedules. When changed, the new value becomes effective with the next schedule request in the queue.

#### 11.1.1.3. Database Time Zone

The *Database Time Zone* is the time zone (ET, CT, MT, and PT) in which data is stored in the database.

#### 11.1.1.4. Tour Group Rollup Threshold

The *Tour Group Rollup Threshold* parameter determines the smallest number of agents that can be assigned to a particular Tour Group to use for scheduling before those agents are rolled up into other Tour Groups. When changed, the new value becomes effective with the next schedule request in the queue.

#### **11.1.1.5. Site Access**

The *Site Access* setting enables an Administrator to temporarily block access to the Website from other users that are not Administrators.

#### **11.1.1.6. First Day of Week**

The *First Day of Week* setting specifies the day of week that is to be considered first, for weekly forecasting or scheduling. Once the first day of week has been set, changing it will invalidate any reporting on existing runs.

#### **11.1.1.7. Forecast Types Allowed For Exporting**

Forecasts may be exported to other systems interfaced with the WFM Portal. The *forecast Types Allowed For Exporting* setting allows to user to control the type of forecasts that can be exported to other systems.

#### **11.1.1.8. System email**

The *System Email* setting specifies the email address displayed as the sender on emails sent by the WFM Portal to agents or other users.

#### **11.1.1.9. Initial Preferences Edit Period**

The *Initial Preferences Edit Period* setting specifies the number of days over which the initial agent preferences entered by a new agent can't be changed.

#### **11.1.1.10. Subsequent Preferences Edit Period**

The *Subsequent Preferences Edit Period* setting specifies the number of days over which a new set of agent preferences entered by an agent can't be changed.

#### **11.1.1.11. Overtime Limit Applied To Pick Available Shift**

The *Overtime Limit Applied To Pick Available Shift* setting specifies whether the overtime limit set for an agent will be applied when a dropped shift is available and that volunteers to work it.

#### **11.1.1.12. Agent Responsible For Dropped Shift If Not Taken**

The *Agent Responsible For Dropped Shift If Not Taken* setting specifies if an agent will be responsible from a dropped shift if no other agent volunteers to work that shift. If marked True

#### **11.1.1.13. Allow Future Exceptions without Schedule**

This *Allow Future Exceptions Without Schedule* setting specifies whether a user can enter exceptions for an agent without a schedule in a future week.

## **12. Data Management**

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The Forecaster database is updated either with an automated process or using the upload data functionality provided under the *Administration->Operations->Upload->Upload Stream Data* page. If an automated data upload process is used in the user's set up, it is discussed in the Data Interface document. This section discusses manual upload and data editing functionalities only. Stream data including contact volumes and handling times may be uploaded from csv files. Special events data is updated through the web site.




## 12.1. Streams

Stream data may be viewed, edited, or graphed using the *Stream Data* module, and may be uploaded using the *Upload Stream Data* module. Both of these modules are described in the following sections.

### 12.1.1. Stream Data

Regardless of how data is being updated, stream data may be viewed, edited, or graphed by using the *Stream Data* module. It is reached by clicking the *Stream Data* link under the *Database->Manage* menu. The *Stream Data* page should appear similar to as shown in Figure 12.1.

#### Manage Stream Data



The screenshot shows a web interface for managing stream data. At the top, there is a 'Select Environment:' dropdown menu with 'Raw Data' selected. Below this is a table with the following columns: Environment, Stream, History Start Date & Time, History End Date & Time, and Action. The table contains ten rows of data, each representing a stream with its ID, start and end times, and a set of action icons (calendar, list, and bar chart).

Environment	Stream	History Start Date & Time	History End Date & Time	Action
Raw Data	AA0101	1/1/1999	01:00:00 AM	1/1/2000 12:00:00 AM
Raw Data	AA0102	1/1/1999	12:00:00 AM	1/1/2000 12:00:00 AM
Raw Data	AA0104	1/1/1999	12:00:00 AM	1/1/2000 12:00:00 AM
Raw Data	AA0105	1/1/1999	12:00:00 AM	1/1/2000 12:00:00 AM
Raw Data	AA0106	1/1/1999	01:00:00 AM	1/1/2000 12:00:00 AM
Raw Data	AA0107	1/1/1999	12:00:00 AM	1/1/2000 12:00:00 AM
Raw Data	AA0108	1/1/1999	12:00:00 AM	1/1/2000 12:00:00 AM
Raw Data	AA0109	1/1/1999	12:00:00 AM	1/1/2000 12:00:00 AM
Raw Data	AA0110	1/1/1999	12:00:00 AM	1/1/2000 12:00:00 AM

Figure 12.1 – Stream Data Page

#### 12.1.1.1. View Stream Data

When the *View* icon button in the same row with a stream is clicked, stream data is displayed with the Stream name, Start and End Times for the actual values, and whether the value was replaced by the user, as shown in Figure 12.2. For time periods that do not have any data in the database, zeros are displayed.

Selecting an option in the *Select Data Type* drop-down will cause either the Volume, or the Average Service Time, or both values, to be displayed.

## View Stream Data

Start Date:		End Date:		Select Data Type:		Select Bucket Size:			
1/16/2006		4/16/2006		Volume		1 Day		<input type="button" value="Retrieve Data"/> <input type="button" value="Download Data"/> <input type="button" value="Back"/> <input type="button" value="Edit"/>	
Page 1									
							Volume		
Stream Name	Start Date & Time		End Date & Time		Value	Replace			
Stream 01	4/15/2006	12:00:00 AM	4/16/2006	12:00:00 AM	6083	No			
Stream 01	4/14/2006	12:00:00 AM	4/15/2006	12:00:00 AM	11274	No			
Stream 01	4/13/2006	12:00:00 AM	4/14/2006	12:00:00 AM	15259	No			
Stream 01	4/12/2006	12:00:00 AM	4/13/2006	12:00:00 AM	14406	No			
Stream 01	4/11/2006	12:00:00 AM	4/12/2006	12:00:00 AM	14182	No			
Stream 01	4/10/2006	12:00:00 AM	4/11/2006	12:00:00 AM	16697	No			
Stream 01	4/9/2006	12:00:00 AM	4/10/2006	12:00:00 AM	1581	No			
Stream 01	4/8/2006	12:00:00 AM	4/9/2006	12:00:00 AM	7727	No			
Stream 01	4/7/2006	12:00:00 AM	4/8/2006	12:00:00 AM	11676	No			
Stream 01	4/6/2006	12:00:00 AM	4/7/2006	12:00:00 AM	13276	No			
Stream 01	4/5/2006	12:00:00 AM	4/6/2006	12:00:00 AM	15236	No			
Stream 01	4/4/2006	12:00:00 AM	4/5/2006	12:00:00 AM	12818	No			
Stream 01	4/3/2006	12:00:00 AM	4/4/2006	12:00:00 AM	19203	No			
Stream 01	4/2/2006	12:00:00 AM	4/3/2006	12:00:00 AM	1882	No			
Stream 01	4/1/2006	12:00:00 AM	4/2/2006	12:00:00 AM	9035	No			
Stream 01	3/31/2006	12:00:00 AM	4/1/2006	12:00:00 AM	15223	No			
Stream 01	3/30/2006	12:00:00 AM	3/31/2006	12:00:00 AM	15019	No			
Stream 01	3/29/2006	12:00:00 AM	3/30/2006	12:00:00 AM	16962	No			
Stream 01	3/28/2006	12:00:00 AM	3/29/2006	12:00:00 AM	12549	No			
Stream 01	3/27/2006	12:00:00 AM	3/28/2006	12:00:00 AM	20458	No			
Stream 01	3/26/2006	12:00:00 AM	3/27/2006	12:00:00 AM	0	No			
Stream 01	3/25/2006	12:00:00 AM	3/26/2006	12:00:00 AM	5540	No			
Stream 01	3/24/2006	12:00:00 AM	3/25/2006	12:00:00 AM	15751	No			
Stream 01	3/23/2006	12:00:00 AM	3/24/2006	12:00:00 AM	15456	No			
Stream 01	3/22/2006	12:00:00 AM	3/23/2006	12:00:00 AM	15932	No			
Stream 01	3/21/2006	12:00:00 AM	3/22/2006	12:00:00 AM	15022	No			
Stream 01	3/20/2006	12:00:00 AM	3/21/2006	12:00:00 AM	18884	No			
Stream 01	3/19/2006	12:00:00 AM	3/20/2006	12:00:00 AM	0	No			
Stream 01	3/18/2006	12:00:00 AM	3/19/2006	12:00:00 AM	9688	No			
Stream 01	3/17/2006	12:00:00 AM	3/18/2006	12:00:00 AM	15653	No			
Page 1									

Figure 12.2 – View Stream Data Page

### 12.1.1.2. Edit Stream Data

Stream data can be edited by clicking on the *Edit* button in the *View Stream Data* page, as shown in Figure 12.3. To edit a data value, type in the new value in the edit box and click on the *Update* button. Data can be edited on any aggregate level. If you wish to edit data on a daily basis, change the Bucket Size to 1 Day, and then edit a day's value. The ratio by which you change the daily total will be applied equally to the interval level data.

## Edit Stream Data

Start Date:		End Date:		Select Data Type:		Select Bucket Size:				
1/16/2006		4/16/2006		Volume		30 Minutes		<input type="button" value="Retrieve Data"/> <input type="button" value="Download Data"/> <input type="button" value="Back"/> <input type="button" value="Cancel"/> <input type="button" value="Update"/>		
Page 1										
							Volume			
Stream Name	Start Date & Time		End Date & Time		Value	Mark	Replace			
Stream 01	4/15/2006	11:30:00 PM	4/16/2006	12:00:00 AM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	11:00:00 PM	4/15/2006	11:30:00 PM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	10:30:00 PM	4/15/2006	11:00:00 PM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	10:00:00 PM	4/15/2006	10:30:00 PM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	09:30:00 PM	4/15/2006	10:00:00 PM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	09:00:00 PM	4/15/2006	09:30:00 PM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	08:30:00 PM	4/15/2006	09:00:00 PM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	08:00:00 PM	4/15/2006	08:30:00 PM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	07:30:00 PM	4/15/2006	08:00:00 PM	0	<input type="checkbox"/>	No			
Stream 01	4/15/2006	07:00:00 PM	4/15/2006	07:30:00 PM	0	<input type="checkbox"/>	No			

Figure 12.3 - Edit Stream Data

### 12.1.1.3. Graph Stream Data

Stream data can be graphed by clicking on the *Graph* icon button for a particular stream. The graph should appear similar to as shown in Figure 12.4. The graph shows all actual values in the database for the stream in dark red.

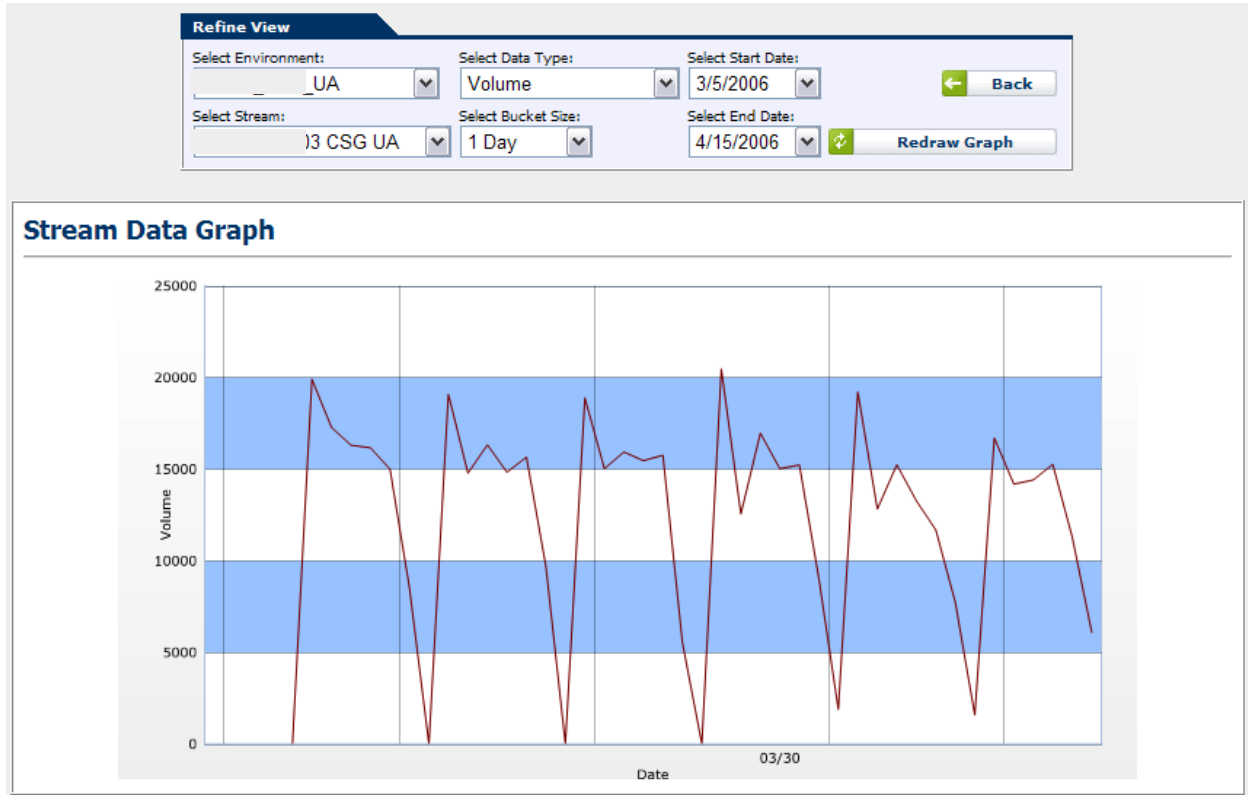


Figure 12.4– Stream Data Graph

Controls that allow selecting the environment, stream name, data type, and display bucket size are provided to refine the chart. Aggregated values can be displayed by selecting a larger bucket size than the bucket size the values are stored in the database.

### 12.1.2. Upload Stream Data

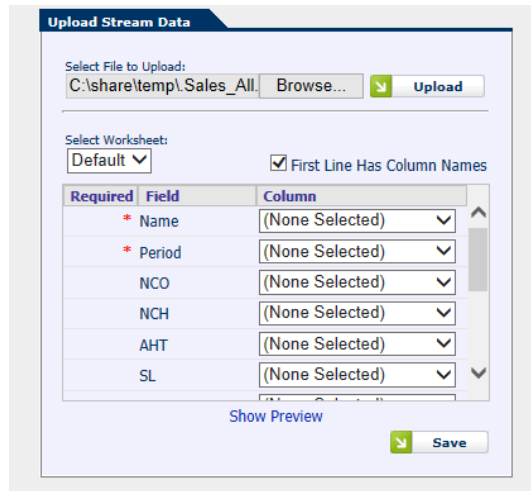
The *Upload Stream Data* module can be reached by clicking on the *Upload Stream Data* link on the *Administration->Operations->Upload* menu. This module uploads stream data into the database.

*Caution: Only daily or interval data may be uploaded. Uploading data in larger bucket sizes such as weekly or monthly may result in inaccurate results.*

#### 12.1.2.1. Upload Data File

The data file (for example, a CSV text file, or an excel spreadsheet file) can be up-loaded by clicking the Browse button, then selecting the file to upload in the Open File Dialog, and finally clicking on the Upload button, as shown in Figure 12.5. If the file contains more than one Worksheet, select the appropriate sheet in the *Select Worksheet* drop-down. Click on

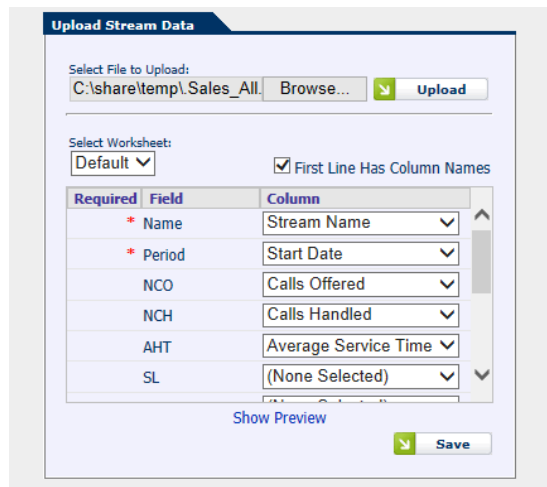
the *First Line Has Column Names* checkbox to indicate if the file contains the names of the columns in the first line. The column drop-down fields will automatically adjust accordingly.



**Figure 12.5 – Upload a Data File**

#### 12.1.2.2. Select Appropriate Columns

Once the file has been parsed according to the selections above, the columns for import may be selected in the following list of fields. The fields with a red asterisk in the *Required* column must be specified in order to load the data. Other fields are optional, but may be required per the Business needs. An example selection of columns is shown in Figure 12.6.



**Figure 12.6 – Columns Selected for Import**

#### 12.1.2.3. Preview and Save Stream Data

Once the columns are selected, the user may click on the *Show Preview* link to display a preview of a portion of the data as it will be saved to the database, as a way to verify that the file will be processed as expected. An example, where the user has selected Name, Period, NCO, NCH, and AHT fields for import, is shown in Figure 12.7 below.

Name	Period	NCO	NCHAHT
.Sales	4/12/2014 11:30:00 PM	57	33 790.96973
.Sales	4/12/2014 11:00:00 PM	101	67 778.626870746269
.Sales	4/12/2014 10:30:00 PM	108	78 757.15385
.Sales	4/12/2014 10:00:00 PM	137	93 772.344116989247
.Sales	4/12/2014 9:30:00 PM	149	120 767.241655
.Sales	4/12/2014 9:00:00 PM	144	139 772.244597122302
.Sales	4/12/2014 8:30:00 PM	159	154 720.175334090909
.Sales	4/12/2014 8:00:00 PM	153	142 724.683086619718
.Sales	4/12/2014 7:30:00 PM	191	171 714.637434795322
.Sales	4/12/2014 7:00:00 PM	182	165 716.224252909091

**Figure 12.7 - Preview Stream Data**

The preview may be hidden by clicking the *Hide Preview* link. The preview does not need to be hidden in order to save the data. Once the user is satisfied that the data will be imported as expected, then the Save button may be clicked to launch the import. If there is an error in the data, the user will be notified and given a chance to retry. Otherwise, the user will be notified that the data has been loaded into the database.

## 12.2. Special Events

New special events can be added and special events data may be updated using the *Manage Special Events Data* page. The Update Special Events Data page can be reached by selecting the Special Events Data item in the *Database->Manage* menu.

### 12.2.1. Manage Special Events

#### 12.2.1.1. Add New Special Event

A New Special Event can be added using the *Add New Special Event* area in the *Update Special Events Data* page. An event name must be entered, and an event type must be selected. The event can then be added by selecting the *Add Event* button. The new event will immediately appear in the list of events.

**Figure 12.8 – Add New Special Events**

*Event Type* can be selected from the drop-down menu. The event types available include the following:

- Calendar Event: An event that occurs at certain dates (e.g. first day of a month).
- Planned Event: An event that is created and scheduled by the user's organization.

*Event Level* can be selected as well. This will let you configure daily, weekly and monthly Special Events. A Daily Event is applied to daily forecasts. Monthly events are applied to forecasts for every day in a month, and so on.

Clicking on the *Add New Special Event* button adds the new event.

### 12.2.1.2. Edit Special Event

To edit a Special Event, click on the *Pencil* icon next to the event type. Then change the Event Name, Event Level or Event Type, and click the *Check Mark* icon to save. Clicking the *Red X* icon will cancel the edit.

### 12.2.1.3. Delete Special Event

To delete a Special Event, check the box to the left of the event name and click on the *Delete* button. Or click on the *Trash Can* icon for any event.

## 12.2.2. Update Special Events Data

Special events and dates of occurrence are entered using the *Manage Special Events Data* page as shown in Figure 12.9. Days on which a special event occurs can be entered by checking the boxes in the row corresponding to that event and the dates shown. If the date is not shown on the page, you can navigate to the next or previous pages using the *Next* and *Previous* links, or by selecting a date in the calendar at the top of the page. The dates entered are automatically saved into the database. If a day is marked for an event incorrectly, it should be unchecked. New event status on that day will again be saved automatically.

**Update Special Events Data**

< December 2006 January 2007 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2	1	2	3	4	5	6	
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	31			
31													

Jump To: 1 2000 Go

Event	Event Level	Event Type	12/03	12/04	12/05	12/06	12/07	12/08	12/09	12/10	12/11	12/12	12/13	12/14	12/15	12/16
<input type="checkbox"/> .Friday after Memorial Day	Day	Calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> .Friday before Memorial Day	Day	Calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> .Monday before Memorial Day	Day	Calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 3rd Friday before Christmas	Day	Calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 3rd Monday before Christmas	Day	Calendar	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> .Sunday after Memorial Day	Day	Calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> .Sunday before Memorial Day	Day	Calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> z_TNA	Day	Planned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> z_WWE	Day	Planned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Figure 12.9 – Update Special Events Data**

## 12.3. Exceptions

Exceptions can be added, updated or deleted using the *Manage Exceptions* page. The *Manage Exceptions* page can be reached by selecting the *Mange Exceptions* link in the *Database->Manage* menu.

### 12.3.1. Manage Exceptions

#### 12.3.1.1. Add New Exception

A New Exception can be added using the *Add New Exception* area in the *Manage Exception* page as shown in Figure 12.10. An exception name must be entered and the Paid or Unpaid type, Availability, On Site, Entire Day, Duration, Approval, Limit and Limit Range must be selected. The exception can then be added by selecting the *Add New Exception* button. The new exception will immediately appear in the list of exceptions as shown in Figure 12.11.

Figure 12.10 – Add New Exception

Manage Exceptions											Configure
Exception Name	Icon	Paid or Unpaid	Availability	On Site	Vacation / Personal Time	Duration (Hours)	Approval	Default Limits		Limits Time Range	Action
								W/O Approval	With Approval		
.test		Paid	Available	On Site	N/A	0	Required	N/A	1	None	
Break		Paid	Unavailable	On Site	N/A	1	Not Required	None	None	None	
Doctor's appointment		Unpaid	Available	Off Site	N/A	0.25	Required	N/A	2	Per Week	
Lunch		Unpaid	Unavailable	On Site	N/A	1	Not Required	None	None	None	
Meeting		Paid	Available	On Site	N/A	0.25	Required	N/A	4	Per Week	
OverTime		Paid	Available	On Site	N/A	0	Not Required	None	None	None	
Paid Day Off (PTO)		Paid	Unavailable	Off Site	N/A	1	Not Required	4	8	Per Week	
Personal		Paid	Available	Off Site	Personal Time	Entire Day	Required	N/A	None	None	
PTO meeting		Unpaid	Available	Off Site	N/A	3	Required	N/A	2	Per Week	
Sick Day		Unpaid	Available	Off Site	N/A	Entire Day	Not Required	None	None	None	
Snow		Unpaid	Unavailable	Off Site	N/A	Entire Day	Not Required	None	None	None	
Vacation day		Paid	Available	Off Site	Vacation	Entire Day	Required	N/A	None	None	

Figure 12.11 – Manage Exception List

Field	Description
<b>Exception Name</b>	The name given to the exception
<b>Icon</b>	Icon selected to represent the exception
<b>Paid or Unpaid</b>	Whether or not the exception time is paid or unpaid
<b>Availability</b>	Available – exception is displayed on the Exception drop-down lists / Unavailable –exception is not displayed on the Exception drop-down lists
<b>On Site</b>	Whether the exception occurs on site or off site
<b>Vacation / Personal Time</b>	Used for less-than-a-week vacation time accounting. Personal time is unpaid.
<b>Duration (Hours)</b>	Options are either Entire Day or a duration limit

<b>Approval</b>	Required – an admin user must approve. Not Required – will automatically be approved
<b>Default Limit w/o Approval</b>	Maximum hours that can be approved without approval
<b>Default Limit with Approval</b>	Maximum hours that can be approved with approval
<b>Limits Time Range</b>	Time interval over which Default Limits w/o Approval and Default Limits with Approval are specified. Available options are Per Week and Per Month

### 12.3.1.2. Edit an Exception

To edit an Exception, click on the *Edit* icon in the Action column and then make any necessary, and click the *Check Mark* icon to save as shown in Figure 12.12. Clicking the *Red X* icon will cancel the edit.

Exception Name	Icon	Paid or Unpaid	Availability	On Site	Vacation / Personal Time	Duration (Hours)	Approval	Default Limits		Limits Time Range	Action
								W/O Approval	With Approval		
.test		Paid	Available	On Site	N/A	Entire Day	Required		1	None	
Break		Paid	Unavailable	On Site	N/A	1	Not Required	None	None	None	
Doctor's appointment		Unpaid	Available	Off Site	N/A	0.25	Required	N/A	2	Per Week	

**Figure 12.12 – Edit an Exception**

### 12.3.1.3. Delete an Exception

To delete an Exception, click on the *Trash Can* icon for any exception. Deleting an exception that has been used will remove the exception from the agent's schedule.



## 13. Glossary

The *Glossary* page is used to support the user in finding definitions for terms used within the Portal. It can also be modified using the *Manage Glossary Terms* page.

### 13.1. Accessing the Glossary

The *Glossary* page is displayed by clicking on the *Question Mark* icon at the far right of the menu tabs on any page. A popup will appear displaying a tab for searching the glossary and a tab for the index of all the glossary terms, as shown in Figure 13.1.

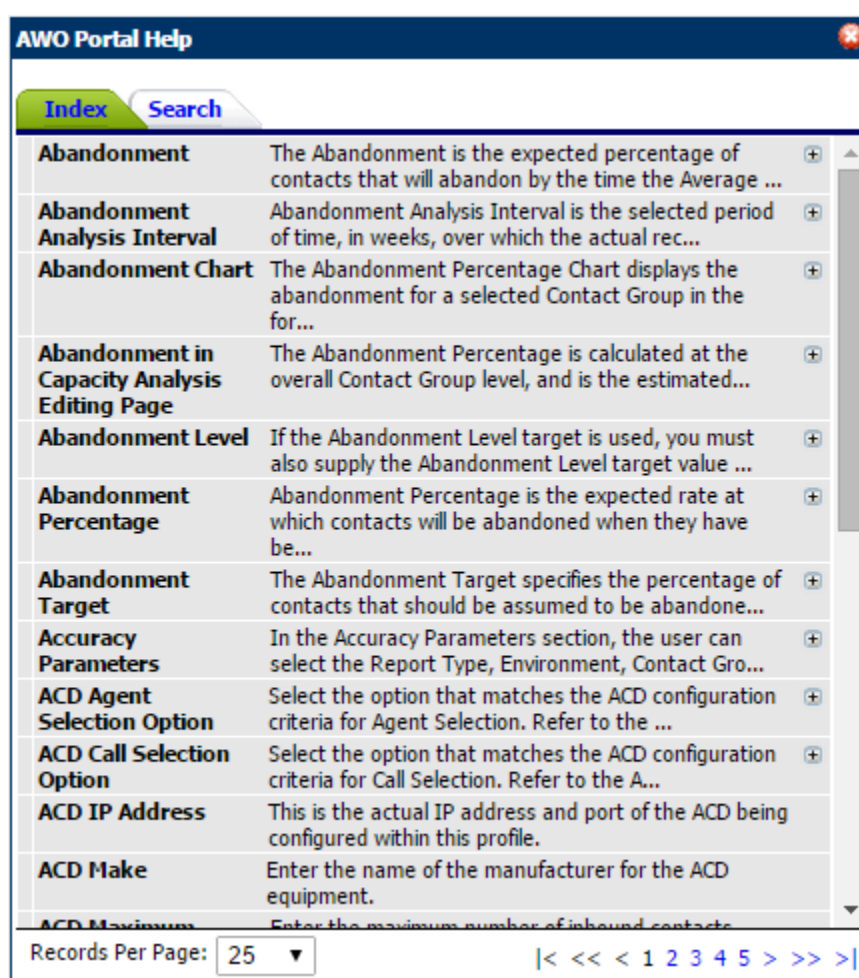


Figure 13.1 – Glossary

#### 13.1.1. Search

A search can be performed in the *Search* tab by entering text into the text box and clicking the *Search* button. The glossary will provide automatic suggestions based on what is entered into the search textbox. Searching the glossary, the results will be ranked in the order listed below:

1. Exact match of the glossary term
2. Terms containing words in the search text
3. Definitions with the whole search text within
4. Definitions containing words or quoted phrases within the search text

## 13.2. Managing the Glossary

The *Manage Glossary* page is accessed by going to *Help* -> *Manage Glossary* in the main menu tabs of the WFM Portal website. On this page, glossary terms can be added, edited, or deleted. A new glossary term can be added by entering its name into the text box provided and clicking the *Add* button at the bottom of the *Manage Glossary* page. This will add the new term into the glossary and open a row for editing the definition of the new term. Existing glossary terms can be edited or deleted by clicking the *Edit* and *Delete* icons respectively, as shown in Figure 13.2.

**Manage Glossary Terms**

Begins With  Filter

Term	Definition	Created	Last Modified	Action
Abandonment	The Abandonment is the expected percentage of contacts that will abandon by the time the Average ...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Abandonment Analysis Interval	Abandonment Analysis Interval is the selected period of time, in weeks, over which the actual rec...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Abandonment Chart	The Abandonment Percentage Chart displays the abandonment for a selected Contact Group in the for...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Abandonment in Capacity Analysis Editing Page	The Abandonment Percentage is calculated at the overall Contact Group level, and is the estimated...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Abandonment Level	If the Abandonment Level target is used, you must also supply the Abandonment Level target value ...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Abandonment Percentage	Abandonment Percentage is the expected rate at which contacts will be abandoned when they have be...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Abandonment Target	The Abandonment Target specifies the percentage of contacts that should be assumed to be abandone...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Accuracy Parameters	In the Accuracy Parameters section, the user can select the Report Type, Environment, Contact Gro...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Agent Selection Option	Select the option that matches the ACD configuration criteria for Agent Selection. Refer to the ...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Call Selection Option	Select the option that matches the ACD configuration criteria for Call Selection. Refer to the A...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD IP Address	This is the actual IP address and port of the ACD being configured within this profile.	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Make	Enter the name of the manufacturer for the ACD equipment.	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Maximum Inbound Contacts	Enter the maximum number of inbound contacts.	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Queue ID	This is a unique identifier for this particular queue. This can be found within the ACD configur...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Queue Name	This is the name given to the queue. This should correspond with the stream name used in the int...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Skill ID	This is the ID of the skill being serviced by this particular queue. This value should be taken ...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Time Zone	Select the Time Zone (ET, CT, MT, and PT) for which the ACD is configured, as well as indicating ...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACD Update Interval	Enter interval in minutes for database updates.	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
ACDs	An ACD defined within the database represents an individual ACD within the organization.	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Action in Capacity Analysis Editing Page	The Action component allows downloading of the displayed information, and also enables the change...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Action in Configure Data Items	Individual data items may be edited by clicking on the Edit icon in the action column. Also, dat...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Actions for Requirement Runs	Several actions are available, which are dependent on the status of the run. When a job is Queue...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Actions in Manage Capacity Planning Runs	Several actions are available, which are dependent on the status of the run. When a job is Queue...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Active Attrition	The Active Attrition field displays the expected active attrition, or promotions, as shown in the...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	
Add Forecast Profile	The user can create a new profile by entering a name and a description for the new profile and th...	5/5/2014 9:59 AM	5/5/2014 9:59 AM	

Page: 1 Records Per Page: 25

<< < 1 2 3 4 5 6 7 8 9 10 >> >

**Add New GlossaryTerm**

Names:

Add GlossaryTerm

Figure 13.2 – Manage Glossary Terms

## 14. Workflow Management

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The *Workflow Management* module is used to i) create a *Workflow Template*, ii) create a *Workflow Profile* (an instant of a *Workflow Template* which can be configured and activated), iii) access the *Manage My Workflow Assignments* page to manage workflow assignments, and iv) access *Workflow Reports*. The module is designed to allow executives and managers to create work orders for specific workforce management (WFM) work requests, assign steps to specific WFM team members, and track the timeliness and service level performance of the WFM team.

### 14.1. Creating a New Workflow Template

To create a new *Workflow Template*, select *Configure Workflow Template* from the *WF Manage* module. To create a New Work Order Template, right click on *Workflow Template* in the *Workflow Template Configuration* section on the left. This will create a template with the name *New Workflow Template*. To rename or delete a *Workflow Template*, right click and select the appropriate action on the popup displayed.

Two types of steps can be added: *Process* (rectangle shaped) and *Decision* (diamond shaped). To add a *Process* or *Decision* step, left click into the *Template Preview* area (yellow area). A new popup will be presented with options to add a *Process* or a *Decision* step, as shown in Figure 14.1. The user may add a step by selecting the appropriate step type. To add additional steps, this step should be repeated. Once all process or decision steps are created, the user should order them according to precedence order for clarity.

A *Process* step represents a step with a beginning and ending in processing a work order. For instance, generating shift bid forecasts is a process step. A *Decision* step involves a review of the results of processes completed prior to the *Decision* step. A *Decision* step results in two outcomes: yes or no. If the results is no, one or more of the process steps completed before will have to be repeated.

Next, the user should add links between steps to indicate precedence order for the steps added. Each *Process* step has one input (a solid small green circle) and one output (a small green ring) on its left and right sides, respectively. A *Decision* step has one input and two outputs for *Yes* and *No* decisions. To add a link from the output of a step as an input for the next, on the green ring hold down the left click and drag to the green circle of the next step, as shown in Figure 14.1. And to delete a link, on the input ring hold down left click for the next step and drag away.

Finally, a *Process* or *Decision* step can be renamed or deleted by left clicking on the box or diamond representing the step and selecting the appropriate action. The user can save your workflow template by clicking on the *Save* button.

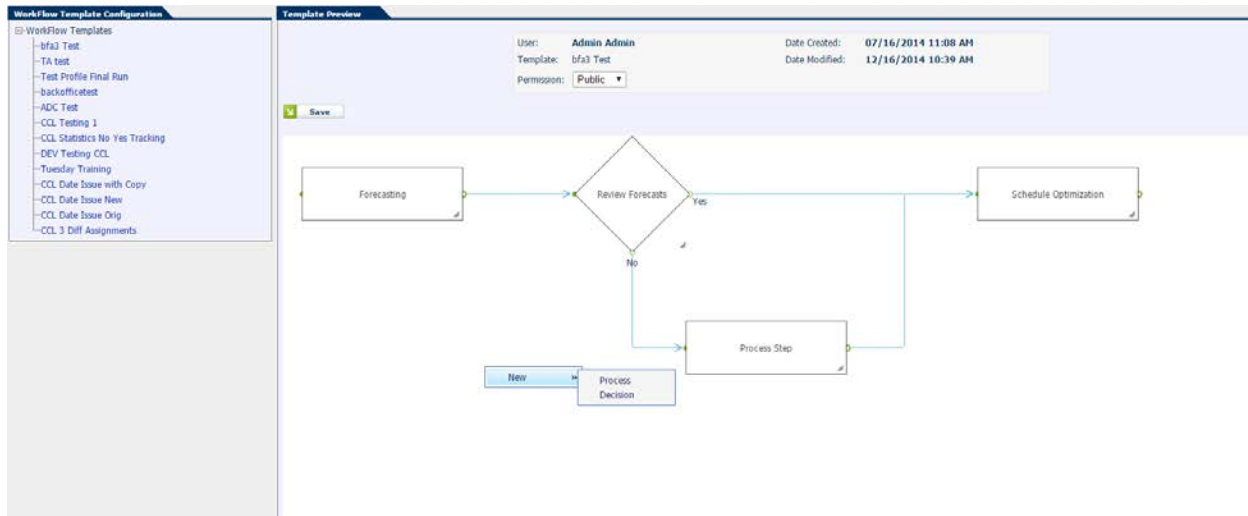


Figure 14.1 – Workflow Template Configuration

## 14.2. Creating a Work Order

To create a *Work Order*, click on the *Manage Work Orders* link from the *WF Manage* dropdown. A new work order is created by entering a name, description, selecting a Workflow Template and environment, and specifying a date and time for its activation in the *Add New Work Order* area, as shown in Figure 14.2.

Figure 14.2 – Add New Work Order

To configure a *Work Order*, click on the *Edit* icon in the Action column. Once the *Edit Work Order* page opens, the user can configure each step by adding the name of the team member responsible for completing the step, one or more backup team members if the primary user specified is not available, service level (SL) target and instructions regarding the step. To enter this information, left click on the *Process* or *Decision* step and click on the *Configure* link displayed to access the configuration popup as show in Figure 14.3. The user may either type the information directly or click on the Search icon to find the user's name and contact information in the WFM database and auto-populate the Configuration popup.

*Note: Work Order steps can only be assigned to WFM Portal users.*

## Edit Work Order

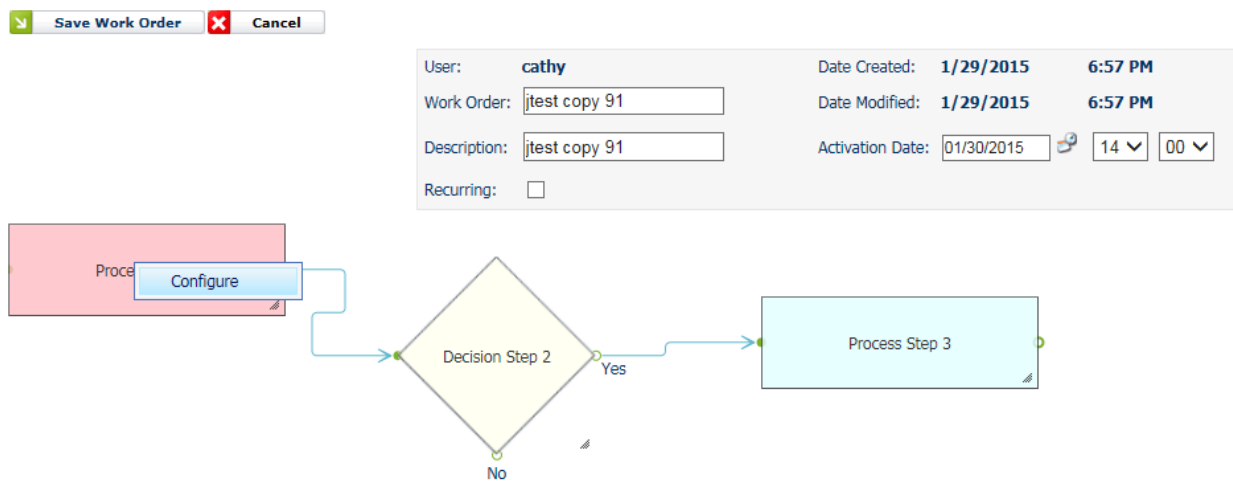


Figure 14.3 – Edit Work Order

Once the configuration of all steps is completed, the Work Order may be Activated from the *Manage Work Orders* page by clicking on the *Activate* icon (green arrow).

*Note: All steps of a Work Order must be configured to Activate it.*

## 14.3. Manage My Workflow Assignments

When a *Work Order* is activated, the user responsible from the first step will receive a system generated email informing the user of the pending request and SL target for the request. The user can access the *Manage My Work Order Assignments* from the *WF Manage* module. Using the filter drop-down, the user can select *All*, *Upcoming*, *New*, *In Progress* or *Overdue* orders. Once accessed, the user may *Acknowledge* a request by clicking on the *Green* arrow icon next to the request as shown in Figure 14.4. This will change the status of the *Work Order Assignment* to *InProgress*.

Once, the step is completed, the user must come to this page and indicate the completion of the step by clicking on the *Complete* icon. The user may also enter comments regarding the step being completed. These comments will be available to other users with assignments as part of the work order activated. The user responsible from the next step will be notified by an email to start the next *Process* or *Decision* step.

**Manage My Work Order Assignments**

Task Name	Task Description	Date Assigned	Due Date	Responsibility	Action
Forecast to Proceed New	Check Forecast	N/A	N/A	Primary	
Requirement Run New	Do RQRD run	N/A	N/A	Primary	
Forecast to Proceed Orig	Publish Forecast	N/A	N/A	Primary	
Requirement Run Orig	Run Required	N/A	N/A	Primary	

Figure 14.4 – Manage My Work Order Assignments

## 14.4. Workflow Reports

To access the *Workflow Reports*, select the *Work Order Reports* link from the *WF Manager* dropdown. The two reports available are the *Log* and *Statics*, as shown in Figure 14.5. These reports provide on-time completion performance summary regarding work orders activated over a period of time. The user may configure various filters to view or download reports.

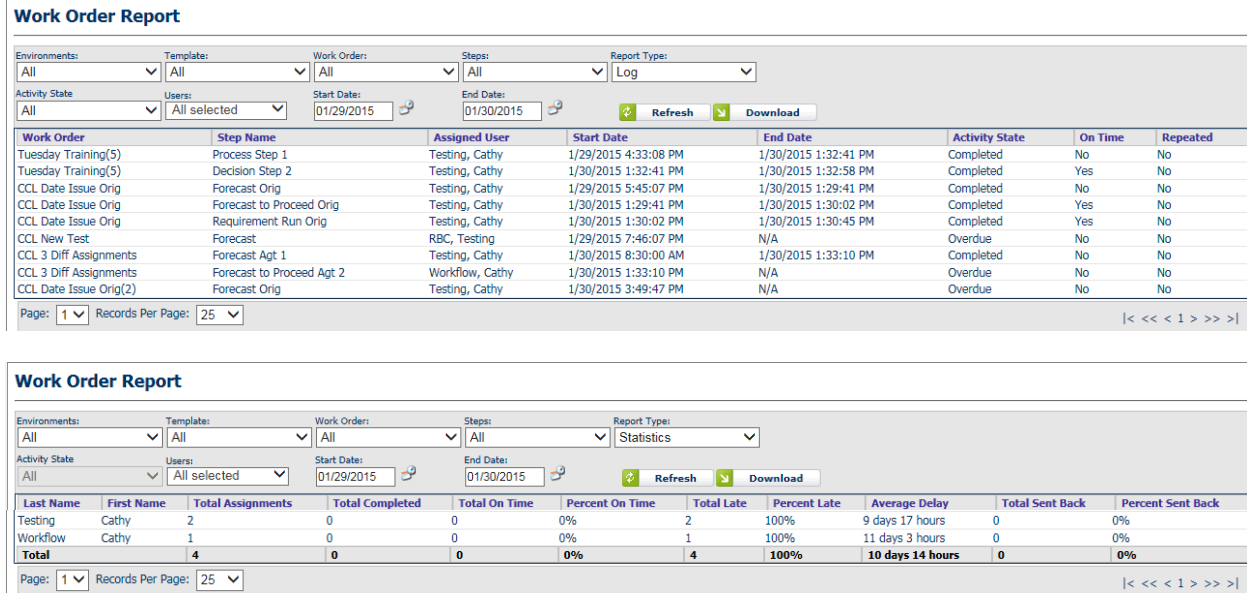
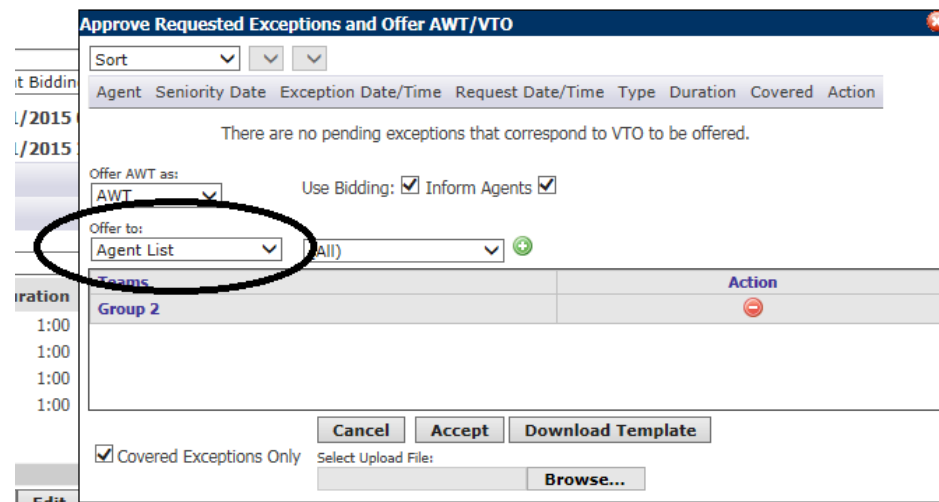


Figure 14.5 – Work Order Report

## 15. Agent Lists

This section describes how to *create Agent Lists* which are used in segment bidding. Agents included in *an Agent List* can be from multiple organizational units. This allows the user to control who can get the segment availability and bid when segment bidding is configured. To create an agent list, select the *Agent Lists* under *Planning -> Bid Manager*.

Note: When using *Agent List* it must be selected on the Approve Requested Exceptions and Offer AWT/VTO page in the Performance Optimizer from the Offer to: drop-down list when the time is offered. When bidding by bid group Offer to: would be by organizational unit.



### 15.1 Creating a New Agent List

To create a new Agent List, select *Agent Lists* from the *Bidding Manager* module. An agent list can be created either by using the *Add New Agent List* area, the *List Wizard* or *Download Template*, as shown in Figure 15.1. *Agent Lists* are added, edited, downloaded or deleted from the *Manage Agent List* page.

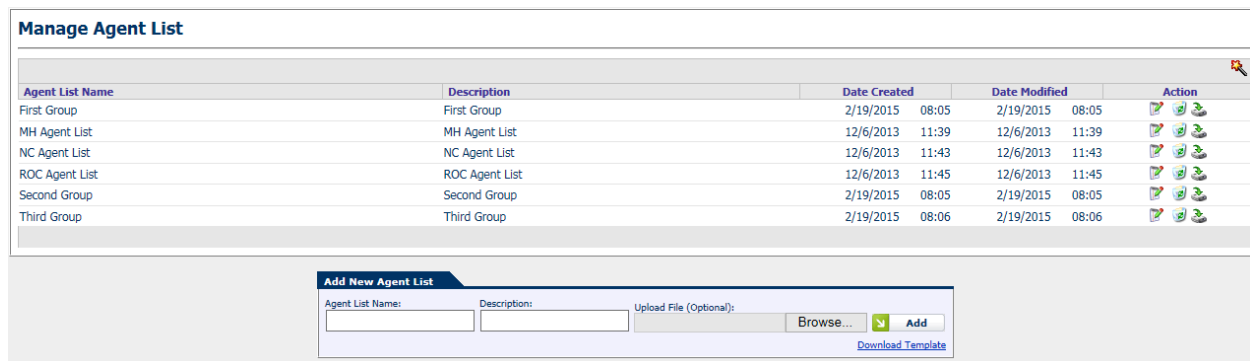


Figure 15.1 – Manage Agent List

### 15.1.1. Add New Agent List

The user can create a new Agent List by entering a name and a description for the new Agent List and then selecting the *Add* button, as shown in Figure 15.2. This will place the new Agent List on the *Manage Agent List* page.

**Figure 15.2 – Add New Agent List**

To add agents to the list click on the *Edit* icon to open the Agent List box, as shown in Figure 15.3. Click on the *Download Template* link to download a template. The file template format is .csv with columns for the Agent HR Id value (Agent Attribute HRID), the Agent Name with Last name followed by the First name separated by a space, as stored in the agents' profile. Once the file is updated and saved click on *Browse* to select the file, click on the *Add* button. This will populate the list, click on *OK* button to save the list or *Cancel* to exit.

**Figure 15.3 – Agent List**

### 15.1.2. List Wizard

The user can create a new Agent List by clicking on the *List Wizard* icon in the upper right corner of the *Manage Agent List* page which opens the *Create List Wizard* box, as shown in Figure 15.4. This allows the user to add agents based on a selected custom agent attribute.

**Figure 15.4 – Create List Wizard**

Selecting the Attribute will populate the drop-down list to the right with the available attribute choices, click on the *Get Agents* button. This will populate the list, as shown in



Figure 15.5. If it is a new list enter the name and click on *OK* button to save the list or *Cancel* to exit. The user can either create a New List, Add to List or Replace List.

**Create List Wizard**

Create Agent List based on Agent Attributes:

Select Attribute: Bid by Segment Group 2

Agent Name	HR ID	Organizational Unit
Segment Bid Agent 19	9919	Segment Bidding
Segment Bid Agent 2	9902	Segment Bidding
Segment Bid Agent 20	9920	Segment Bidding
Segment Bid Agent 3	9903	Segment Bidding
Segment Bid Agent 4	9904	Segment Bidding
Segment Bid Agent 5	9905	Segment Bidding
Segment Bid Agent 6	9906	Segment Bidding
Segment Bid Agent 7	9907	Segment Bidding
Segment Bid Agent 8	9908	Segment Bidding
Segment Bid Agent 9	9909	Segment Bidding

New List

**Figure 15.5 – Create List Wizard with Names**

### 15.1.3. Download Template

Click on the *Download Template* link to download a template in the *Add New Agent List* box, as shown in Figure 15.6. The file template format is .csv with columns for the Agent HR Id value (Agent Attribute HRID), the Agent Name with Last name followed by the First name separated by a space, as stored in the agents' profile. Once the file is updated and saved click on *Browse* to select the file, click on the *Add* button. This will populate the list, click on *OK* button to save the list or *Cancel* to exit.

**Add New Agent List**

Agent List Name:  Description:  Upload File (Optional):

[Download Template](#)

**Figure 15.6 – Download Template**

## 16. Segment Bidding

In this section the *Segment Bidding process* is discussed. Segment Bidding is used to allow agents to bid on available work time (AWT), overtime (OT) or volunteer time off (VTO) offers based on either agent list or bid group assignments. Awards using agent list will be based on a first come first served and for bid groups ranking is used. Once the time has been offered, see section 10.2.1.1 VTO/AWT of the WFM v2 Agent Workstation Admin User Manual, the user will create the segment bidding period.

This page is accessed by selecting *Bidding -> Segment Bidding* from the menu in the Agent Workstation module, as shown in Figure 16.1.

Figure 16.1 – Segment Bidding Period

### 16.1 Create New Segment Bidding Period

To create a new Segment Bidding Period, select *Segment Bidding* from the *Bidding* module. Selecting either *Bid Group* or *Agent List* from the *Select Group* drop-down will determine what will be available on the drop-down in the *Add Bid Segment Period* box. The *Day of Week* drop-down is used to filter the list based on the day of week selected.

The following table details the fields in the *Add Bid Segment Period* box:

Field	Description
<b>Bid Group Name</b>	Bid Group or Agent List name
<b>Day of Week</b>	Day(s) bid window is open
<b>Start Time</b>	Start Time is when the bid window opens
<b>End Time</b>	End Time is when the bid window closes
<b>Segment Type</b>	Which type of time is being offered
<b>Unit</b>	Period of time, Day or Week
<b>Bid Window</b>	How far (number of days or weeks) in the future offers are visible to the user based on the unit selection

Figure 16.2 Add Bid Segment Descriptions

## **16.1 Edit Segment Bidding Period**

To edit an existing *Segment Bidding Period*, click on the *Edit* icon in the *Action* column for the desired bid period. This will enable the fields to allow the user to make changes.

## **16.2 Delete Segment Bidding Period**

To delete an existing *Segment Bidding Period*, click on the *Delete* icon in the *Action* column for the desired bid period. This will remove the bid period from the list.