# inContact Workforce Management v2

# Capacity Planner Web Site User Manual

# inContact WFM v2 Capacity Planner Web Site User Manual

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# 1   Overview

The WFM v2 Capacity Planner Website, which will be referred to simply as the Website, is the user interface for the Advanced Workforce Optimization Portal.  Its basic function is to allow users to submit capacity planning requests to the Capacity Planner, to manage those requests, and to view the output (agent requirements and other data) from the Capacity Planner.

There are four classes of users who are accommodated in the Website.  They are as follows:

- Administrators:  These users are responsible for administering the Website, including configuring settings common to all Environments and Planning Requests, and managing and creating users.  These users are also able to submit and manage Capacity Planning requests, and view Plans and other output data.

- Planners:  These users are responsible for submitting requests to the Planner and for managing those requests.  They are assigned one or more Environments (an Environment is a collection of contact groups, streams, and organizational units, or OUs) for which to manage capacity planning requests.

- Viewers: These users are given access to view the status of planning requests for Environments assigned to them, and to view the resulting plans and other data. They cannot, however, submit Capacity Planning requests.

- Site Managers: These users are given access to view and edit the site data for sites they are in charge of managing.

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

Complete details on common features of the Portal, logging in, changing passwords, etc, can be found in the **AWO Scheduler User Manual**.

## 1.1   Browser Requirements

Refer to online help for the inContact WFO suite (including inContact WFM v2) for current browser support.  In addition, cookies must be enabled for the application's authentication to function properly.

# 2   Profiles

There are two profile types associated with generating Capacity Plans.  These are Service Profiles, and Service Target Profiles, as described in the next two sections.

## 2.1   Service Profiles

A Profile is a set of configuration options for generating agent requirements.  A user may create multiple profiles, each storing a different configuration, and use them to generate agent requirements for any environment.  A profile is a convenient way for a user to set up a particular configuration once and then use that configuration to generate agent requirements.  Thus, the user does not have to enter all the configuration parameters for each agent requirement generation.

Users that have an Administrator or Planner access level can create, edit, and delete profiles.  Users with the Viewer access level can view the details of profiles associated with

generated agent requirements for the environments assigned to them, but cannot create their own profiles, or edit or delete profiles. All users can view the details of a profile by following the link from the profile name on the *Manage Requirement Runs* page.

## 2.1.1 Profile Information

For users with Administrator or Capacity Planner access level, the *Service Profiles* choice appears in the *Planning -> Capacity Planner -> Profiles* menu. To view the *Service Profile Manager* module, click on the *Service Profiles* menu item. By default, the *Service Profile Manager* displays the list of profiles that the user has configured. This page should appear similar to as shown in Figure 2.1.



| Manage Service Profiles | | | | | | | |
|---|---|---|---|---|---|---|---|
| Profile | Service % | ASA (sec) | Occupancy % | Abandonment % | User | Last Modified | Action |
| ac2 Budget Profile | 80 | N/A | N/A | N/A | Admin, Demo | 3/9/2008 7:54 PM | |
| Test Scenario 1 | 75 | N/A | N/A | N/A | Admin, Demo | 11/7/2007 4:47 PM | |
| Test Scenario 2 | N/A | N/A | N/A | 3 | Admin, Demo | 11/7/2007 4:48 PM | |
| Page 1 | | | | | | |< << < 1 > >> >| |

**Figure 2.1 – Service Profile Manager**
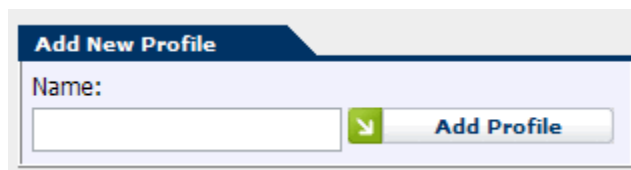
The following sections describe features of the *Service Profile Manager* in detail.

### 2.1.1.1 Profile List

By default, the *Service Profile Manager* displays the list of profiles configured by the user. For each profile, it displays the name of the profile, Service Level, Average Speed of Answer, Occupancy, Abandonment, the user's name, and the last modified date and time. For each profile, an icon to delete the profile, and another icon to enable editing the profile, is provided. Below the list of profiles is a form for creating a new profile.

### 2.1.1.2 Create New Profile

The user can create a new profile by entering a name for the new profile and then selecting the *Add Profile* button, as shown in Figure 2.2.



**Figure 2.2 – Add New Profile**

If there is an error creating the profile, a message will be displayed above the entry fields. If the profile is successfully created, then it will be opened immediately in the edit mode, as described in section 2.1.1.4, below. Upon returning to the *Service Profile Manager*, the new profile will appear in the profiles list

### 2.1.1.3 View Service Profile

One of the features provided by the *Service Profile Manager* module is the ability to view the details of a profile in a non-editable form. The user can view the details of a profile by selecting the Profile name. Selecting the link for a profile causes the *Service Profile Manager* to display the details of the profile, as shown in Figure 2.3.

**Figure 2.3 – Service Profile Details Displayed**

The user may click on *Back* to close the detailed view for the profile and return to the profiles list.

### 2.1.1.4 Edit Profile

The *Service Profile Manager* allows the user to edit his or her profiles. The user can edit a profile by selecting the *Edit* icon for a profile. When editing a profile, the page appears as is shown in Figure 2.4.



**Figure 2.4 – Editing a Service Profile**

To cancel editing of a profile without saving any changes entered since the most recent update, select the *Cancel* button. Following is a description for each of the configuration items in a profile.

### 2.1.1.4.1 Call Service Targets

The items grouped under Call Service Targets are used to configure the overall targets to be used by the agent requirements generation.  They have a direct impact on the length of time it takes to generate agent requirements for an environment.  One may select one or several optimization targets.

#### 2.1.1.4.1.1 Service Level

To generate agent requirements with a specific Service Level target in mind, one should check the Service Level check box.  Once Service Level is checked, you must also define a Percentage of Calls to be answered in a given time frame.  These items default to 80% and 20 seconds.

#### 2.1.1.4.1.2 Average Speed of Answer

To generate agent requirements where a specific Average Speed of Answer metric is the target, select Average Speed of Answer.  Once this is selected, you must also supply the target ASA value in Seconds.

#### 2.1.1.4.1.3 Maximum Occupancy

One may also use Maximum Occupancy level as a target for agent requirement generation.  Select this value and then enter a target Maximum Occupancy level as a percentage.

#### 2.1.1.4.1.4 Abandonment Level

If the Abandonment Level target is used, you must also supply the Abandonment Level target value as a percentage.

#### 2.1.1.4.1.5 Service Target Profile

The Service Target Profile can be used to define very granular service target goals.  The creation and management of Service Target Profiles is described in the **AWO Portal Scheduler User Manual**.

### 2.1.1.4.2 Workload Service Targets

The *Workload Service Targets* section identifies the service window characteristics to use when generating agent requirements.

#### 2.1.1.4.2.1 Service Window Type

The *Service Window Type* can be set to *Single* or *Multiple*.

#### 2.1.1.4.2.2 Service Window

*Service Window* defines the *Service Window* in minutes.  If *Single* is selected for *Service Window*, a single value is defined for this service window.  If *Multiple* is selected, you must also define the *Service Span* and *After Hours Contacts* in minutes as shown in Figure 2.5.

**Figure 2.5 – Service Window**

### 2.1.1.4.2.3 Multimedia Agent Productivity

*Multimedia Agent Productivity* defines the effectiveness of Multimedia Agents. Should you wish to increase or decrease the workload handled by such agents, you can adjust this value accordingly. By default it is set to 100%, which is a standard agent productivity level.

### 2.1.1.4.3  Data Analysis Parameters

The *Data Analysis Parameters* section identifies the data analysis parameters to use when generating agent requirements.

### 2.1.1.4.3.1 Calculate Customer Abandonment Parameters

This option allows the user to specify whether abandonment parameters should be calculated automatically based on existing call data, or should be entered manually into the profile. When the Manual option is selected, then *Abandonment Percentage* and *AWT* must be entered into the profile (see section 2.1.1.4.3.1.1). When the Automatic option is selected, the user must select the Abandonment Analysis Interval (see section 2.1.1.4.3.1.2).

#### 2.1.1.4.3.1.1 Abandonment Percentage

*Abandonment Percentage* is the expected rate at which contacts will be abandoned when they have been waiting for the specified *Average Wait Time (AWT)* measured in seconds.

#### 2.1.1.4.3.1.2 Abandonment Analysis Interval

*Abandonment Analysis Interval* is the selected period of time, in weeks, over which the actual recorded abandonment statistics will be analyzed in order to automatically calculate average abandonment criteria.

### 2.1.1.4.3.2 Volume and Average Service Time Adjustment Factor

The *Volume* and *Average Service Time Adjustment Factors* allow the Contact Volume and Average Service Time values for each period to be adjusted by a fixed percentage. These values may be positive or negative.

### 2.1.1.4.3.3 Before and After Contact Work Time

The *Before* and *After Contact Work Time* values allow constant amounts of time to be prepended and appended to the average handling time values to account for time such as non-phone agent work time.

### 2.1.1.5 Save Profile

In order to save changes made to a profile, you must click the *Save* button. There are a number of reasons that saving a profile may not succeed. If invalid values or contradictory settings are specified by the user, one or more messages located near to the incorrect value or values will appear, asking the user to correct these values and resubmit the update. Furthermore, editing a profile while agent requirements are being generated is not allowed.

## 2.2 Service Target Profiles

A *Service Target Profile* is a table that allows certain service target parameters to be specified on an interval (or other) level. It enables fine-grained control over the specification of these parameters. The *Manage Service Target Profiles* page appears in Figure 2.6 below.



**Figure 2.6 – Manage Service Target Profiles**
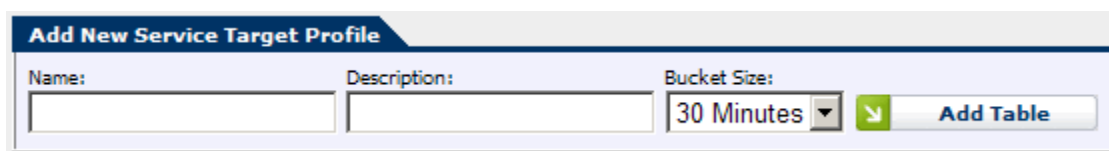
For users with Administrator or Capacity Planner access level, the Service Target Profiles choice appears in the *Planning -> Capacity Planner -> Profiles* menu item.

### 2.2.1 Service Target Profile List

By default, the *Service Target Profile Manager* lists the *Service Target Profiles* configured by the user. For each profile, it displays the name and description of the profile, the name of the user that created the profile, the bucket size of the data contained within, and the created and modified dates of the profile and its data. For each profile, an icon to delete the profile, and another icon to enable editing the profile, is provided. Below the list of profiles is a form for creating a new *Service Target Profile*.

### 2.2.2 Create new Profile

The user can create a new *Service Target Profile*, by entering a name and a description, and selecting the appropriate bucket size for the new profile, and then selecting the *Add Table* button, as shown in Figure 2.7..



**Figure 2.7 – Add New Service Target Profile**

If there is an error when creating the new profile (for example, a profile with the name already exists), a message will be displayed to that effect. If the new profile is successfully created, then the new profile will be opened immediately in edit mode, as described in section 2.2.4 below.

## 2.2.3 View Profile

One of the features provided by the *Service Target Profile Manager* module is the ability to view the details of a profile in a non-editable form.  The user can view the details of a profile by selecting the Service Profile name link.  Selecting the link for a profile causes the *Service Profile Manager* to display the details of the profile, as shown in Figure 2.8.



**Edit Service Target Profile**

| | | | User: | Admin, Admin | Date Created: | 3/10/2009 04:56 PM |
| Service Target Profile: | Test TA | Date Modified: | 3/10/2009 04:56 PM |
| Description: | Test |
| Bucket Size: | 30 Minutes |

| Period | | | Service Level (%) | Service Level Threshold (sec) | Average Speed of Answer (sec) | Abandonment Target (%) | Abandonment (%) | Average Waiting Time (sec) |
|---|---|---|---|---|---|---|---|---|
| 0 | Saturday | 00:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 1 | Saturday | 00:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 2 | Saturday | 01:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 3 | Saturday | 01:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 4 | Saturday | 02:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 5 | Saturday | 02:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 6 | Saturday | 03:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 7 | Saturday | 03:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 8 | Saturday | 04:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 9 | Saturday | 04:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 10 | Saturday | 05:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 11 | Saturday | 05:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 12 | Saturday | 06:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 13 | Saturday | 06:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 14 | Saturday | 07:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 15 | Saturday | 07:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 16 | Saturday | 08:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 17 | Saturday | 08:30 | 80 | 20 | 10 | 0 | 3 | 20 |
| 18 | Saturday | 09:00 | 80 | 20 | 10 | 0 | 3 | 20 |
| 19 | Saturday | 09:30 | 80 | 20 | 10 | 0 | 3 | 20 |

**Figure 2.8 – View Service Target Profile**

The user may click on Back to return to the Manage Service Target Profiles page.

## 2.2.4 Edit Service Target Profile

The *Service Target Profile Manager* allows the user to edit his or her profiles.  The user can edit a profile by selecting the *Edit* icon for a profile.  When editing a profile, the page appears as is shown in Figure 2.9.

**Figure 2.9 – Edit Service Target Profile**

To cancel editing of a profile without saving any changes entered since the most recent update, select the *Cancel* button. Following is a description for each of the configuration items in a Service Target Profile.

### 2.2.4.1 Period

The period identifies the day of week and the time (depending on the selected bucket size) that a record pertains to. The values specified in the record will apply to any data point whose day of week and time come during the interval starting with this record and ending one bucket length later.

### 2.2.4.2 Service Level (%)

The Service Level identifies the target percentage of contacts to be answered within the specified Service Level Threshold.

### 2.2.4.3 Service Level Threshold (sec)

The Service Level Threshold specifies the amount of time in which the required service level percentage of contacts should be answered.

### 2.2.4.4 Average Speed of Answer (sec)

The average speed of answer specifies the average amount of time that it should take from the time a contact is offered until it is answered by an agent.

### 2.2.4.5 Abandonment Target (%)

The Abandonment Target specifies the percentage of contacts that should be assumed to be abandoned when calculating the required number of agents.

### 2.2.4.6 Abandonment (%)

The Abandonment is the expected percentage of contacts that will abandon by the time the Average Waiting Time has passed from when the contacts were offered.

### 2.2.4.7 Average Waiting Time (sec)

The Average Waiting Time is the amount of time the average contact waits in the queue before abandoning. The Abandonment (previous section) and Average Waiting Time describe the contacts' expected abandonment pattern.

# 3 Inputs and Assumptions

The Inputs and Assumptions section allows the configuration of site data, such as AHT Ramp data and Head Counts, and also allows the specification of rules for distributing available agents to the Contact Groups served.

## 3.1 Site Data

Site Data is stored on a per-Organizational Unit basis. There are a number of categories of data preconfigured which are used automatically by the Capacity Planning module. Data for some categories may be selected by date range, in which case the weeks during the selected period is displayed and may be editable. Existing data may be downloaded by selecting the Download button. New data may be uploaded by first downloading a generated CSV (comma-separated values) file, editing this file to include the new data values, and then uploading the edited file.

Edited data is marked with the date and user name of the last edit, and may be highlighted with a special background color if configured (see section 3.3 below). An administrator may choose to *Accept* any edited data, in which case data accepted will no longer be highlighted. The last date edited and the user name of the editor is maintained, and may always be examined by placing the cursor over the data value in question. Data may be accepted by clicking on the *Accept* button.

The following sections describe the fixed (or built-in) categories of site data that are required for the Capacity Planning Module to function properly.

### 3.1.1 AHT Ramp Site Data

The AHT Ramp Site Data category maintains the estimated Average Handling Time of agents in each week of the training ramp. Tenured agents are assumed to be configured in the last week of the training ramp. AHT Ramp Site Data appears as in Figure 3.1.
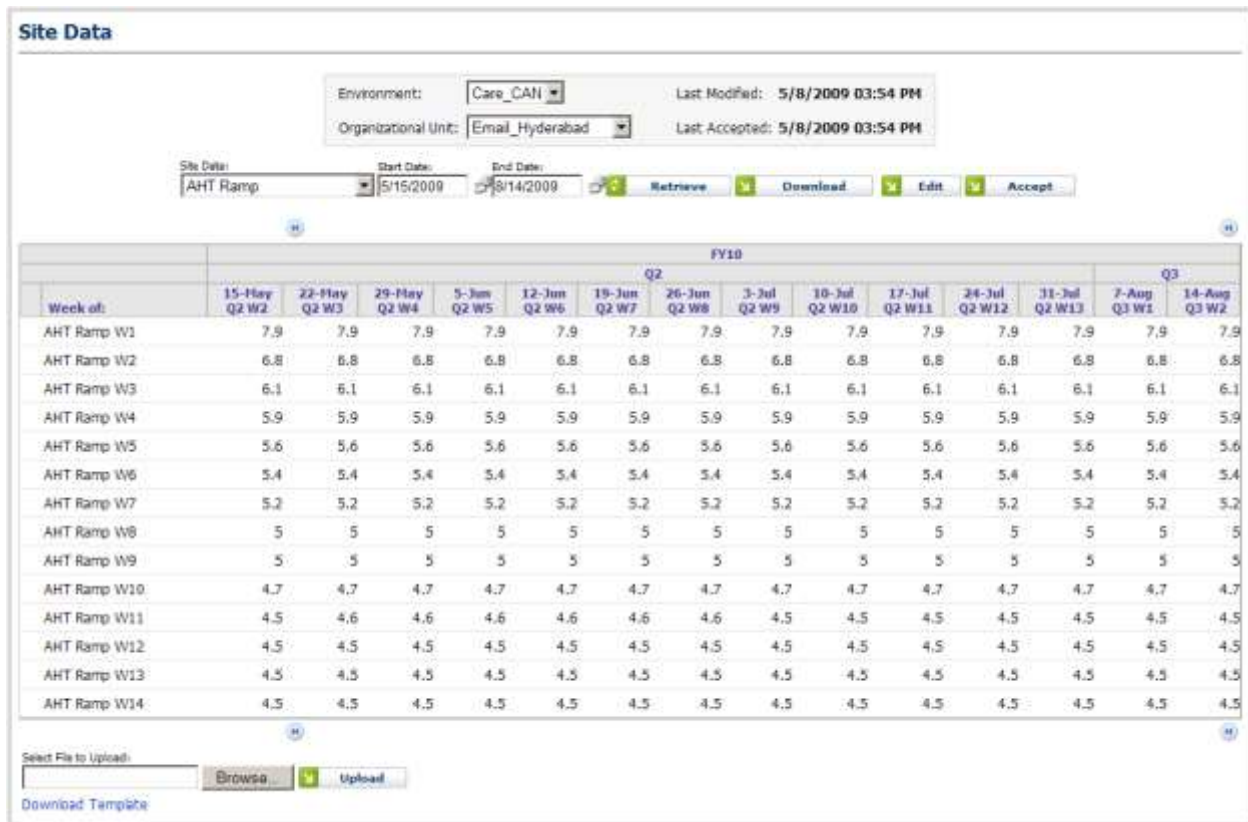
## Site Data



**Figure 3.1 – AHT Ramp Site Data**

The Data may be edited by selecting the Edit button. Data from weeks in the past may be viewed through the Site Data module, however, only data during the present week and weeks in the future may be edited. When the edit button is selected, the Site Data page changes to allow editing of any editable fields, as shown in Figure 3.2. Some fields may be configured as read-only, in which case text boxes are not shown for those fields.
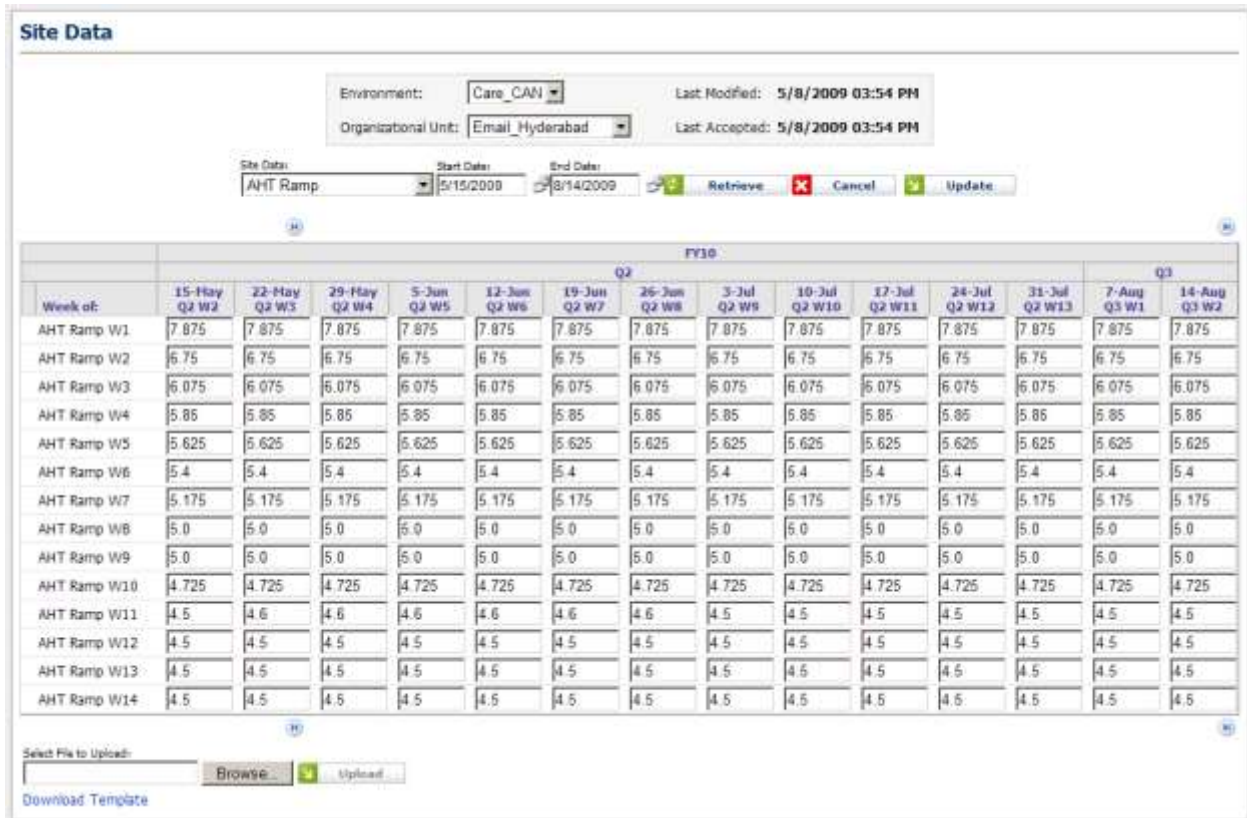
**Figure 3.2 – AHT Ramp Site Data in Edit Mode**

The configuration for the AHT Ramp Site Data (see section 3.3) specifies that when values are not present for a given week, values from the previous week should be used. Therefore, when the values for AHT Ramp (or other) Site Data are the same for a multi-week period, only the values for the first week need to be entered by the user.

### 3.1.1.1 Edit Date Range

Weekly Site Data categories may be edited for multiple values at one time. The Edit Date Range Dialog may be displayed by right-clicking on the data item name (for instance, AHT Ramp W1), and selecting the Edit Date Range option from the context menu. The Edit Date Range Dialog appears as in Figure 3.3 below.
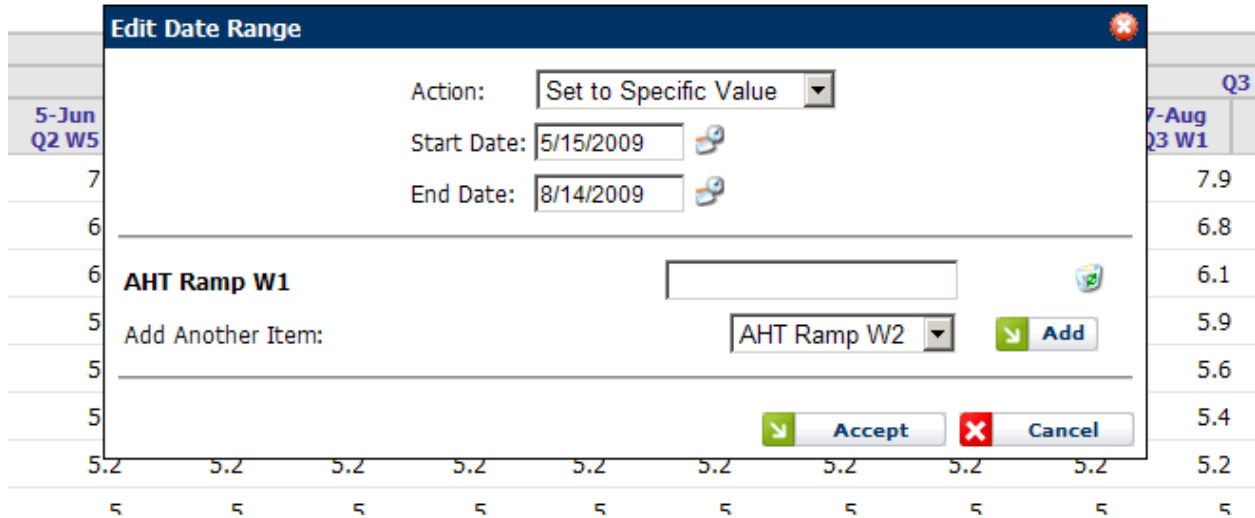
**Figure 3.3 – Edit Date Range Dialog**

The Start and End dates may be selected to choose the weeks to update. At least one week (in other words, the same Start and End Date) must be selected. At least one item must be selected, however, and as many as all the items in the particular site data, so that all the data items may be edited at once.

Four options are available for the Action to take to the specified data items and date range, as described in the following sections.

### 3.1.1.1.1  Set to Specific Value

With this option, the value of each data item will be set to the value entered in the text box adjacent to each item listed, for each week within the specified date range. Existing values are overwritten.

### 3.1.1.1.2  Clear Values to Default

With this option, the values for the specified data items within the date range are removed, and therefore returned to their defaults. For this option, the text fields adjacent to each item are not used and are therefore not enabled.

### 3.1.1.1.3  Adjust by Amount

With this option, the values for the specified data items within the date range are increased or decreased by the absolute amount specified in the text fields adjacent to each item. Positive values increase, and negative values decrease the existing values. Values reduced below zero are rounded up to zero automatically.

### 3.1.1.1.4  Adjust by Percentage

With this option, the values for the specified data items within the date range are increased or decreased by the percentage specified in the text fields adjacent to each item. Positive percentages increase, and negative percentages decrease the existing values. Values reduced below zero are rounded up to zero automatically.

## 3.1.2 Floor Headcount Site Data

Floor Headcount site data category maintains data related to the number of agents employed at each site (organizational unit). This information is tracked using various categories of adjustments, such as transfers, agents beginning training, and attrition. These adjustments, some of which are calculated values, are configured in the Site Data Configuration module (see section 3. 3). The Floor Headcount Site Data category appears as in Figure 3.4, in edit mode.



**Figure 3.4 – Floor Headcount Site Data**

In this example, it may be noticed that certain fields are not editable. These fields are configured as read-only. Also, in the first column of the *Productive Headcount* field, there is a plus-sign icon. Clicking this icon will reveal a number of hidden fields that precede the *Productive Headcount* field. Once the hidden fields are revealed, a minus-sign icon will appear in place of the plus-sign icon. Clicking this minus-sign icon will hide the fields again. Whether or not fields are hidden by default is configured in the Site Data Configuration module (see section 3.3 below).

## 3.1.3 Productivity

The Productivity Site Data category contains site data that is used to calculate agent utilization. Fields include those attributes of agent time that determine shrinkage, which is used in the calculation of FTE (full-time-equivalent) values from existing agent counts. The

interface is weekly, similar to the interfaces of the AHT Ramp and Floor Headcount site data categories.

## 3.1.4 Staff Pay-grade Midpoints

The Staff Pay-grade Midpoints Site Data category contains the cost estimates for tenured and non-tenured agents, and for each type of support staff. These values are automatically applied in Capacity Planning runs when calculating costs and support staff counts. Rules for configuring items in this category are found in section 3.3 below.

## 3.1.5 Staff Ratios

The Staff Ratios Site Data category contains the ratios of particular support staff types to the number of floor agents. The ratios are expressed as the number of floor agents per one support staff member. For example, if there is one support staff member for each 15 floor agents, then the ratio stored would be 15. When calculating the total number of support staff during a Capacity Planning run, the number of support staff of each type is calculated and rounded up to the nearest integer. Rules for configuring items in this category are found in section 3.3 below.

## 3.1.6 Training Parameters

The Training Parameters Site Data category contains certain values necessary for tracking the progress of new hires, and for calculating rates of attrition. This category is not a weekly data category; rather, it allows specifying each of its values by a specific range of dates. The category appears as in Figure 3.5.



**Figure 3.5 – Training Parameters Site Data**

The default value is configured in the Site Data Configuration module (see section 3.3 below). Values for specific date ranges and Organizational Units can be added or edited by clicking on the Edit button. Existing range values can be modified and new ranges can be added. The Begin Date represents the first day, and the End Date the last day, respectively, through which the value will be applied, in both the Floor Headcount Site Data category, and also in any Capacity Planning runs. Date ranges for a single data item cannot overlap. Date ranges for different data items may vary.

### 3.1.7 Transition Productivity

The Transition Productivity Site Data category contains values that determine the productivity of agents in various weeks of the training ramp. This category is not a weekly data category; rather, it allows specifying each of its values by a specific range of numbers. The category appears as in Figure 3.6.



**Figure 3.6 – Transition Productivity Site Data**

The default value is configured in the Site Data Configuration module (see section 3.3 below). Values for specific number ranges and Organizational Units can be added or edited by clicking on the Edit button. Existing range values can be modified and new ranges can be added. The Lower Range represents the first ramp week, and the Upper Range the last ramp week, respectively, through which the value will be applied, in both the Floor Headcount Site Data category, and also in any Capacity Planning runs. Number ranges for Transition Productivity may not overlap.

## 3.2  Site Allocation Tables

Site Allocation Tables are used in Capacity Planning runs to determine the allocation of blended queue agents to the Contact Groups served. They are also used to identify and store information about vendor (or OSP) sites.

### 3.2.1 Manage Site Allocation Tables

The *Manage Site Allocation Tables* module displays the site allocation tables available to the user. For each table, the name, description, name of the user who created it, the associated environment, and the created and modified dates are displayed. For each table, an icon to delete the table, and another icon to enable editing the table, is provided. The *Manage Site Allocation Tables* module appears as in Figure 3.7.

**Figure 3.7 – Manage Site Allocation Tables**

## 3.2.2 Add New Site Allocation Table

Below the Manage Site Allocation Tables module is the *Add New Site Allocation Table* module. This module allows creation of new Site Allocation tables, and appears as in Figure 3.8. The user may enter a name and description for the new table, then select the Environment the table should be created for, and then click the *Add Table* button to create the new table. If a table with the same name already exists, a message will be displayed asking the user to enter a different name. If the table is successfully created, it is immediately opened in edit view.
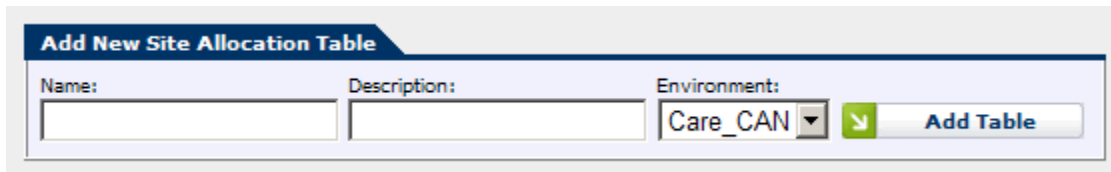


**Figure 3.8 – Add New Site Allocation Table**

## 3.2.3 View Site Allocation Table

From the Manage Site Allocation Tables module, selecting a table name link will open the selected table in read-only view mode. The interface is identical to the Edit Site Allocation Table module (see section 3.2.1), except that the data is not editable, but is displayed in read-only form.

## 3.2.4 Edit Site Allocation Table

From the *Manage Site Allocation Tables* module, selecting the *Edit* icon in the *Action* column will open the selected table for editing in the *Edit Site Allocation Table* module, which appears as in Figure 3.9. The module contains two sections: the upper section, which contains configuration information for the table, and the lower section, which contains information about each Contact Group and Organizational Unit combination within the table's associated Environment.

### 3.2.4.1  Upper Section - Site Allocation Table Properties

The upper section displays the fixed properties of the table, namely the name of the user who created it, the Environment the table is associated with, the date the table was created, and the date the table was last modified. The upper section also displays editable properties of the table, namely the name and description, and four configuration options that may be selected or not selected.

**Edit Site Allocation Table**

| Save Table | Cancel |

| | | | |
|---|---|---|---|
| User: | Admin, Admin | Date Created: | 3/4/2009 03:24 PM |
| Allocation Table: | DOCXPS default | Date Modified: | 4/28/2009 11:21 PM |
| Description: | DOCXPS default | Prioritize: | ☑ |
| Environment: | **DOCXPS** | Report Required Tenured: | ☑ |
| Apply Blending Hierarchy: | ☐ | | |
| Apply Multiskill Efficiency: | ☐ | | |

Tabs: **DOC - Voice** | XPS - Chat | XPS - Email | XPS - Voice | YTT - Voice

| Organizational Unit | Priority | Vendor | Minimum FTE | Maximum FTE | Maximum Overtime (hrs/FTE) | Maximum Volunteer Time Off (hrs/FTE) | Contact Cost ($/min) | Contact Penalty ($/min) |
|---|---|---|---|---|---|---|---|---|
| DOC-Voice_Sitel-Mumbai | 1 | ☑ | 0 | 0 | 0 | 0 | 0 | 0 |
| DOC-Voice_Pasay | 2 | ☑ | 0 | 0 | 0 | 0 | 0 | 0 |
| DOC-CO LO_Bangalore | 3 | ☐ | 0 | 1000 | 0 | 0 | 0 | 0 |
| DOC-CO LO_Chandigarh | 4 | ☐ | 0 | 1000 | 0 | 0 | 0 | 0 |
| DOC-CO LO_Delhi | 5 | ☐ | 0 | 1000 | 0 | 0 | 0 | 0 |
| DOC-CO LO_Hyderabad | 6 | ☐ | 0 | 1000 | 0 | 0 | 0 | 0 |
| DOC-Voice_Suth-Chennai | 7 | ☑ | 0 | 0 | 0 | 0 | 0 | 0 |

**Figure 3.9 – Edit Site Allocation Table**

### 3.2.4.1.1 Apply Blending Hierarchy

This option, when checked, directs the distribution algorithm to distribute existing agent time in blended queues according to the skill distribution of the agents, rather than strictly by workload. Using blending hierarchy, agent time is distributed to the Contact Groups represented by the agents' primary skills first.

### 3.2.4.1.2 Apply Multiskill Efficiency

This option directs the Capacity Planning process to calculate the small time savings that is realized among multi-skilled agents in blended queues. It accounts for the fact that a single group of multi-skilled agents can handle the combined set of contacts more efficiently than separate groups of single-skilled agents can handle the individual contact types.

### 3.2.4.1.3 Prioritize

This option directs the distribution algorithm to assign recommended agent time (additional or reduction) according to the priority ordering configured by the user in the lower section of the Site Allocation Table (see section 3.2.4.2 below).

### 3.2.4.1.4 Report Required Tenured

This option determines how recommended agent time (calculated in terms of FTE) is converted to recommended agent head counts. When checked, the productivity and utilization of tenured agents is used to calculate the number of required agents. When unchecked, the blended tenured & non-tenured properties are used instead. Using the blended properties may overestimate the number of agents required, since non-tenured agents eventually reach tenured status over a finite period of time.

## 3.2.4.2 Lower Section – Contact Group and Organizational Unit Properties

The lower section displays properties for the Contact Groups and Organizational Units in the table's Environment. The tabs represent queues, either single-skill or multi-skill. The

queues, and hence the tabs, are identified by the names of the Contact Groups in each queue. Blended queues may appear twice, as they will appear once singly and again as part of the blended queue. Each Organizational Unit within the Environment is displayed on the tab of the queue it is associated with; therefore, each Organizational Unit appears only once.

For each Organizational Unit, there are a number of fields that appear on the appropriate tab. The first field is the name of the Organizational Unit. The second field is the priority. Priority is used only when the Prioritize option is selected (see 3.2.4.1.3 above). The priority of an Organizational Unit can be changed by clicking on the Organizational Unit's row and dragging the row to the desired new location. The third field is a check box that indicates whether the particular Organizational Unit is a Vendor (or OSP). The remaining fields pertain either to Vendor or Corporate (non-Vendor) Organizational Units, and editing those fields will be enabled or disabled as appropriate, based on the setting of the Vendor check box field.

Corporate (non-vendor) Organizational Units have the following fields enabled:

- Minimum FTE – This is the minimum FTE that should be assigned to an Organizational Unit when recommended head count is calculated. The existing FTE will be increased or decreased first to this amount for all Organizational Units before considering other rules of distribution, including Volunteer Time Off.

- Maximum FTE – This is the maximum FTE that should be assigned to an Organizational Unit when recommended head count is calculated. The existing FTE will be increased to this amount for all Organizational Units before considering applying Overtime.

- Maximum Overtime – This is the maximum Hours per agent Overtime that should be assigned to a Organizational Unit when recommended head count is calculated. The existing FTE will be increased according to this rule, once the maximum FTE rule has been satisfied.

- Maximum Volunteer Time Off – This is the maximum Hours per agent VTO (Volunteer Time Off) that should be assigned to an Organizational Unit when recommended head count is calculated. The existing FTE will be decreased according to this rule, once the minimum FTE rule has been satisfied.

Vendor (OSP) Organizational Units have the following fields enabled:

- Contact Cost – This is the cost per contact applied to the Vendor Organizational Units contacts allocation to determine the cost of total contacts allocated to the vendor.

- Contact Penalty – This is the cost per contact applied to the Vendor Organizational Units contacts allocation, above the vendor contacts capacity, to determine the cost of total contacts allocated to the vendor.

## 3.3  Configure Data Items

The last item on the Inputs/Assumptions menu is the Configure Data Items module. It appears as in Figure 3.10, below. This module enables the user to configure the data items that appear in the Site Data module, as described in section 3.1 (above). Each Site Data category can be selected from the Category drop-down at the upper-left corner of the module.

Site data items can be configured as simple numeric values, or can have more complex calculated default values, much like in a spreadsheet. The properties of the data items are described in the following sections.

## Configure Site Data Items

Category:
AHT Ramp

| | | AHT Ramp | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Name | Caption | Default Value | Aggregate | Line Break | Read Only | Hidden | % | Action |
| AHT_W1 | AHT Ramp W1 | ISNULL(AHT_W1[DATE - 7],0) | None | | | | | |
| AHT_W2 | AHT Ramp W2 | ISNULL(AHT_W2[DATE - 7],0) | None | | | | | |
| AHT_W3 | AHT Ramp W3 | ISNULL(AHT_W3[DATE - 7],0) | None | | | | | |
| AHT_W4 | AHT Ramp W4 | ISNULL(AHT_W4[DATE - 7],0) | None | | | | | |
| AHT_W5 | AHT Ramp W5 | ISNULL(AHT_W5[DATE - 7],0) | None | | | | | |
| AHT_W6 | AHT Ramp W6 | ISNULL(AHT_W6[DATE - 7],0) | None | | | | | |
| AHT_W7 | AHT Ramp W7 | ISNULL(AHT_W7[DATE - 7],0) | None | | | | | |
| AHT_W8 | AHT Ramp W8 | ISNULL(AHT_W8[DATE - 7],0) | None | | | | | |
| AHT_W9 | AHT Ramp W9 | ISNULL(AHT_W9[DATE - 7],0) | None | | | | | |
| AHT_W10 | AHT Ramp W10 | ISNULL(AHT_W10[DATE - 7],0) | None | | | | | |
| AHT_W11 | AHT Ramp W11 | ISNULL(AHT_W11[DATE - 7],0) | None | | | | | |
| AHT_W12 | AHT Ramp W12 | ISNULL(AHT_W12[DATE - 7],0) | None | | | | | |
| AHT_W13 | AHT Ramp W13 | ISNULL(AHT_W13[DATE - 7],0) | None | | | | | |
| AHT_W14 | AHT Ramp W14 | ISNULL(AHT_W14[DATE - 7],0) | None | | | | | |

**Figure 3.10 – Configure Data Items**

### 3.3.1 Name

Each data item has a name, which is not displayed outside of the Configure Site Data Items module, but which can be used to refer to the value of the data item in default value expressions.  The name should be short and unique.

### 3.3.2 Caption

Each data item has a caption, which is the text that is displayed in the Site Data module to identify the data item to the user.  The caption may be long enough to adequately describe the meaning of the data item, and does not need to be unique.

### 3.3.3 Default Value

A data item may have a default value.  The default value may be a simple numeric value, or it may be an expression that calculates a value based on the values of other data items.  If the default value field is left blank, then the effective default value is null or zero, as appropriate.  When editing an individual data item, the default text box for this field is a single line.  Clicking on the Edit icon next to the text box will open a pop-up window with a large, multi-line text box for editing. The following features are available when writing default value expressions.

#### 3.3.3.1  Site Data Item References

An expression may refer to another site data item by name.  The referenced data item does not have to be in the same category; however, the name of the data item must be unique or else there will be an ambiguous reference which cannot be resolved to a valid value.

Weekly data items (those configured within weekly categories, such as Floor Headcount), implicitly default to referencing other data item values in the same week.  A data item from a different week can be referenced using the indexed reference syntax.  An index is a simple expression, enclosed by square brackets, that follows the data item name.  The expression should calculate the date of the data item to use.  For weekly data items, the current date of the data item is represented by the *DATE* reference.  The date value is a number that indicates the day of the date (much like in most spreadsheet software), so that whole or

fractional days can be added or subtracted.  Hence, the expression *DATE – 7* represents the date of the previous week.  Therefore, the expression *AHT_W1[DATE – 7]* represents the value of the data item named *AHT_W1* for the previous week.

### 3.3.3.2 Mathematical Expressions

Expressions may contain simple mathematical expressions, like addition (+), subtraction (-), multiplication (*), and division (/).  These may be grouped and nested using parentheses.

### 3.3.3.3 Logical Expressions

Expressions may contain simple logical expressions, like greater than (>), less than (<), greater than or equal (>=), less than or equal (<=), not equal (!=), or equal (=).  These expressions resolve to a true or false value.

### 3.3.3.4 Expression Functions

Expressions may include one or more of the following simple Functions.  A function can be referenced by name, followed by a list of arguments, enclosed by parentheses, and separated by commas.  Functions, where possible, follow the syntax of those in spreadsheet programs.

#### 3.3.3.4.1 IF (*logical expression*, *true expression*, *false expression*)

The *IF* function tests the result of the first argument for the values *True* or *False*.  If the value is *True*, the second argument is resolved.  Otherwise, the last argument is resolved.

#### 3.3.3.4.2 ISNULL (expression 1, expression 2)

The ISNULL function tests the result of the first argument.  If the result is not null, it returns it.  Otherwise, it resolves the second argument and returns that value instead.

#### 3.3.3.4.3 ROUND (expression)

The ROUND function resolves the numerical value of the argument, and rounds it to the nearest whole number, according to standard rounding rules.

#### 3.3.3.4.4 ROUNDUP (expression)

The ROUNDUP function resolves the numerical value of the argument, and rounds it up to the next whole number.

#### 3.3.3.4.5 ROUNDDOWN (expression)

The ROUNDDOWN function resolves the numerical value of the argument, and rounds it down to the previous whole number.

#### 3.3.3.4.6 MAX (expression, expression [, expression …])

The MAX function resolves the values of the arguments, and returns the greatest value found.

## 3.3.4 Aggregate

This optional field is used to specify how values of a data item for a collection of Organizational Units may be aggregated.  It is informational only in this version of the software.

### 3.3.5 Line Break

This field indicates whether an empty line should be displayed above the data item, when displayed in the Site Data module.

### 3.3.6 Read Only

This field indicates whether the data item values can be edited in the Site Data module. A read-only data item will always have a value as calculated by it's default value expression.

### 3.3.7 Hidden

This field indicates whether the data item should be hidden by default, in the Site Data module. Hidden data items may be revealed by clicking on the plus-sign icon (see section 3.1.2, above).
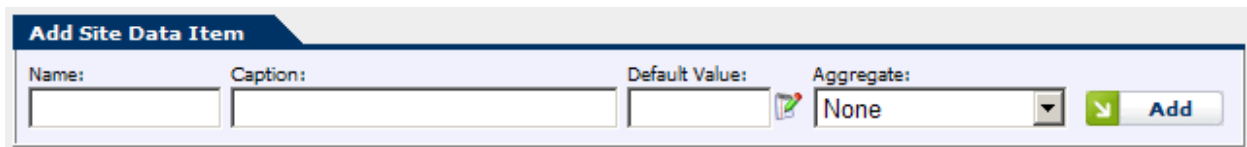
### 3.3.8 Percentage (%)

This field indicates whether the data item value should be interpreted as a percentage. Percentage values are automatically adjusted as necessary when they are used in calculations.

### 3.3.9 Action

Individual data items may be edited by clicking on the Edit icon in the action column. Also, data items that are not required (or 'fixed') may be deleted by clicking on the Delete icon. When editing a data item, the user may cancel the edits by clicking on the Cancel icon, or accept the changes by clicking on the OK icon.

### 3.3.10 Add Site Data Item

Data items may be added using the Add Site Data Item module, which appears as in Figure 3.11, below. A name and caption must be entered for the new data item, and an optional default value. Then clicking on the Add button will add the new site data item to the currently selected category. If a data item with the same name already exists, a warning message will appear asking for the name to be changed and resubmitted.



**Figure 3.11 – Add Site Data Item**

# 4 Capacity Planning

There are several modules related to configuration of capacity planning in an environment, as described in this section. Users with Administrator access level have access to all of the Planning Features described in this section. Users with Viewer or Site Manager access level may not have access to all of the modules featured.

## 4.1 Manage Capacity Planning Runs

The *Manage Capacity Planning Runs* module is shown in Figure 4.1. It can be found under the *Planning -> Planner* menu item. This page provides a list of user submitted capacity planning run jobs and their various states and configuration. The Environment, Description, User, Configuration, Last Run, Status and Action are displayed.



**Figure 4.1 – Manage Requirement Runs**

### 4.1.1 Environment Selection

The *Filter* drop down lets the user filter the run list by environment. You may also filter the result with text. The (All) drop down contains methods to filter by text. Enter text here and you will be able to search through the description fields.

Clicking Filter will refresh the table, applying the filtering criteria.

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

### 4.1.2 Status

Several Status messages may be displayed in the Status column.

| Status | Description |
| --- | --- |
| Queued | Job has been submitted, awaiting execution |
| Running | The job is currently executing. |
| Completed | The job has completed, you may view results |
| Published | The job has been published, thus preventing deletion and making available for Official. |
| Official | The job has been marked as official; it may be used for scheduling. |
| Error | An error occurred during execution, contact your administrator or check your parameters. |

### 4.1.3 Actions

Several actions are available, which are dependent on the status of the run. When a job is Queued or Running you may *Cancel* the job, this will end execution and delete the results. When a job is Completed, Published or Official you may view the results in Strategic Analysis (See Section 4.2) or Re-Run the job. When a job is in an Error state you can Re-Run the job once you have determined the cause of the error. When a job is in Updated or Completed state, the user may request to update the job with the latest Site Data, by selecting the Site Data Update icon (the "S" icon).

### 4.1.4 Deleting Runs

You may delete one run at a time or multiple runs by checking the check boxes in the delete column and then clicking the *Delete* button. You may not delete Published or Official runs. Contact an administrator to delete such runs. The process is laid out in the **AWO Portal Administration Manual**.

## 4.2  Capacity Analysis

The Strategic Analysis module manages the results of a given agent requirements run.  It is from here that one can view, chart and analyze the agent requirements.  The module appears as shown in Figure 4.2.



**Figure 4.2 – Capacity Analysis**

### 4.2.1 Contact Group Summary

The results are grouped by contact group.  Each row in the table represents a single contact group.  Clicking on the various reports on a contact group's row presents that report tailored to that particular contact group.

## 4.2.2 Capacity Analysis Summary

The Capacity Analysis Summary details the overall capacity planning run for the environment. Individual summaries on a contact group level can be found by clicking on the links under the Detailed Statistics column. You may download the environment level summary by clicking on *Download Requirements Summary*.

## 4.2.3 Capacity Analysis View and Edit

Results of a capacity planning run can be viewed in a series of reports, as described in section 4.2.3.1, or edited at a Contact Group or Organizational Unit level, as described in section 4.2.3.2.

### 4.2.3.1 Capacity Analysis Report View

Selecting the View icon under the Capacity Analysis column displays the Capacity Analysis Report view page. This page allows access to both pre-configured and user-configured reports and charts based on the data generated in the Capacity Planning run.

The report to be displayed may be selected from the *Select Report* drop-down list. Depending on the scope of the selected report, either the Contact Group or the Organizational Unit may be selected to filter the displayed data. The report may be downloaded into Excel format by clicking on the *Download* button. The pre-configured reports are described in detail in the following sections.

#### 4.2.3.1.1 Allocations – Projected SL

The *Allocations – Projected SL* report displays the *Calls Offered, Calls Handled, Total Abandonment, Planned Blockage*, and *Total Service Level*, on a Contact Group basis. The report appears as in Figure 4.3.



**Figure 4.3 – Allocations – Projected SL**

#### 4.2.3.1.2 LOB Site Data Report

The *LOB (Line of Business) Site Data Report* displays both contact and head count information, on a Contact Group basis. The report appears as in Figure 4.4.

## Capacity Report



**Figure 4.4 – LOB Site Data Report**

### 4.2.3.1.3  LOB ACD Headcount

The LOB ACD Headcount report displays the existing and recommended (or required) floor head count, on an Organizational Unit basis, for the selected Contact Group.  It appears as in Figure 4.5.



**Figure 4.5 – LOB ACD Headcount**

### 4.2.3.1.4  LOB AHT by Queue

The *LOB AHT by Queue* report displays the existing AHT (*Average Handling Time*) for Organizational Units serving each Contact Group, and the weighted average calculated for the Contact Group itself.  It appears as in Figure 4.6.

**Figure 4.6 – LOB AHT by Queue**

### 4.2.3.1.5 LOB Capacity Plan

The LOB Capacity Plan report displays the Calls Offered and Handled, the Service Level, and other service-related characteristics.  The report appears as in Figure 4.7.



**Figure 4.7 – LOB Capacity Plan**

### 4.2.3.1.6 LOB CRW by Queue

The LOB CRW by Queue report displays the CRW (calls per rep per week) for each Organizational Unit serving each Contact Group.  The report appears as in Figure 4.8.



**Figure 4.8 – LOB CRW by Queue**

### 4.2.3.1.7  Abandonment % Chart

The *Abandonment Percentage Chart* displays the abandonment for a selected Contact Group in the form of a bar chart, as displayed in Figure 4.9.

The charts can be downloaded by clicking on the *Download* icon at the top of the chart as an Excel, Word, PowerPoint, or PDF document by clicking the respective icon.

Printing Charts and Reports is done by clicking the *Print* icon at the top of the chart or report. The browser will prompt you to print the chart or report when the print icon is clicked.
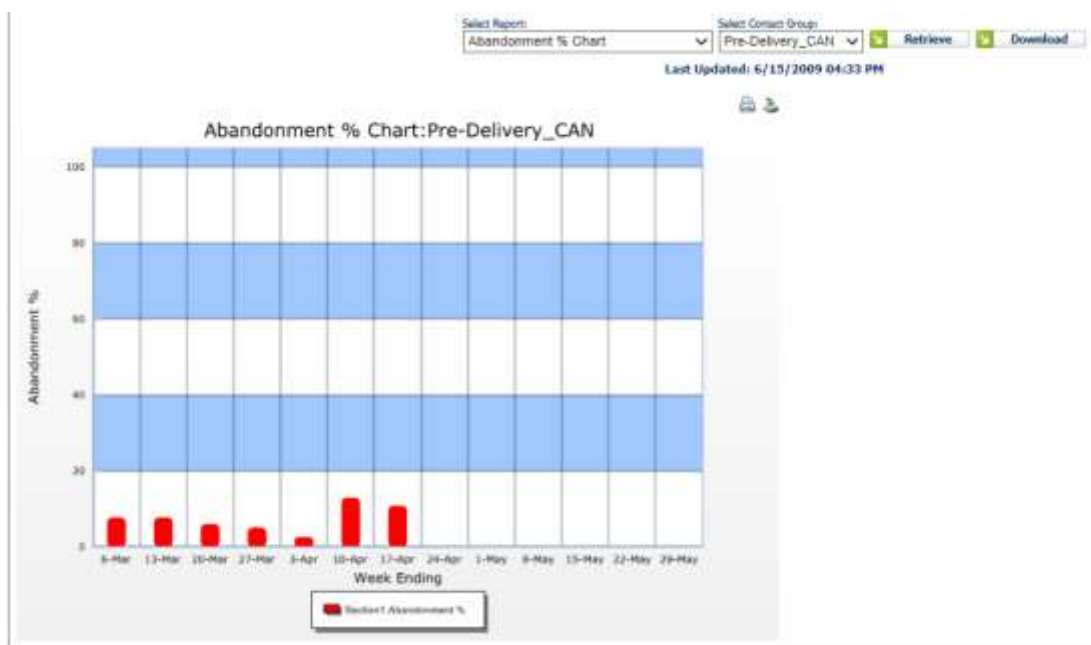


**Figure 4.9 – Abandonment % Chart**

### 4.2.3.1.8  Floor vs. Productive Headcount Chart

The Floor vs. Productive Headcount Chart displays the relationship between the total floor head count and the productive floor head count, for a selected Contact Group.  It appears as in Figure 4.10.

The charts can be downloaded by clicking on the *Download* icon at the top of the chart as an Excel, Word, PowerPoint, or PDF document by clicking the respective icon.

Printing Charts and Reports is done by clicking the *Print* icon at the top of the chart or report. The browser will prompt you to print the chart or report when the print icon is clicked.
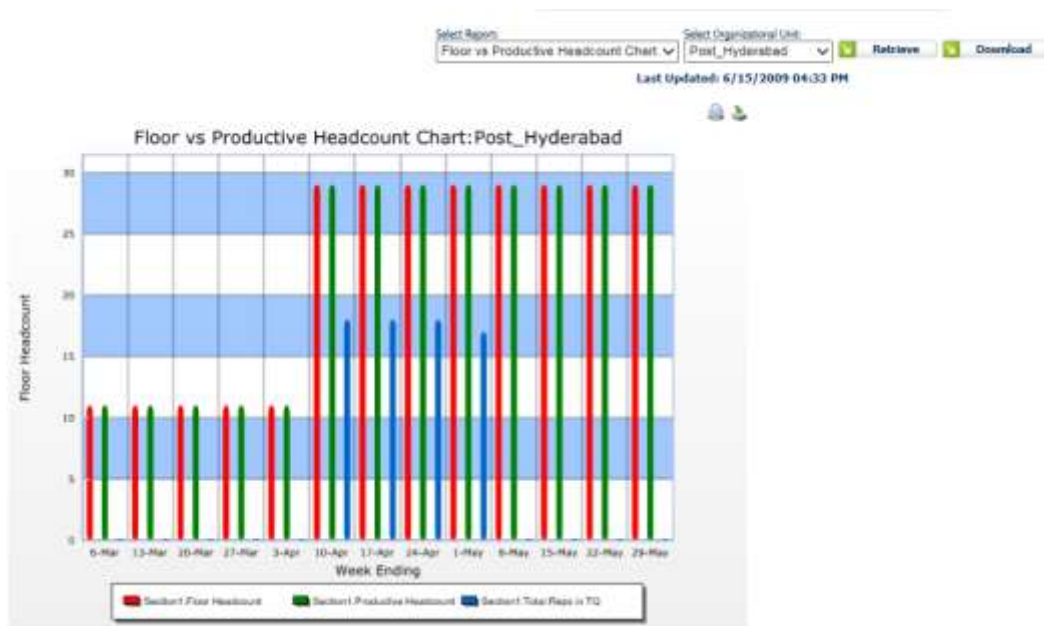
**Figure 4.10 – Floor vs. Productive Headcount Chart**

### 4.2.3.1.9  Handled vs. Service Level % Chart

The Handled vs. Service Level Percentage Chart displays the relationship between the total calls handled and the overall Service Level for a particular Contact Group.  It appears as shown in Figure 4.11.


The charts can be downloaded by clicking on the *Download* icon at the top of the chart as an Excel, Word, PowerPoint, or PDF document by clicking the respective icon.


Printing Charts and Reports is done by clicking the *Print* icon at the top of the chart or report. The browser will prompt you to print the chart or report when the print icon is clicked.

**Figure 4.11 – Handled vs. Service Level % Chart**

### 4.2.3.2 Capacity Analysis Editing

Clicking the *Edit* icon under the Capacity Analysis column displays the Capacity Analysis Editing page, as shown in Figure 4.12.


The charts can be downloaded by clicking on the *Download* icon at the top of the chart as an Excel, Word, PowerPoint, or PDF document by clicking the respective icon.


Printing Charts and Reports is done by clicking the *Print* icon at the top of the chart or report. The browser will prompt you to print the chart or report when the print icon is clicked.
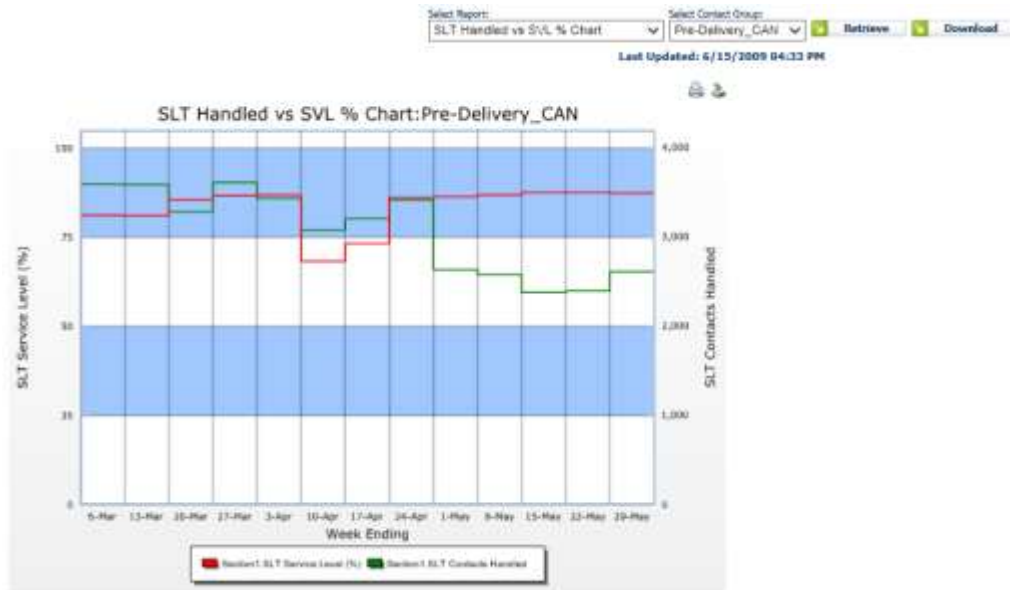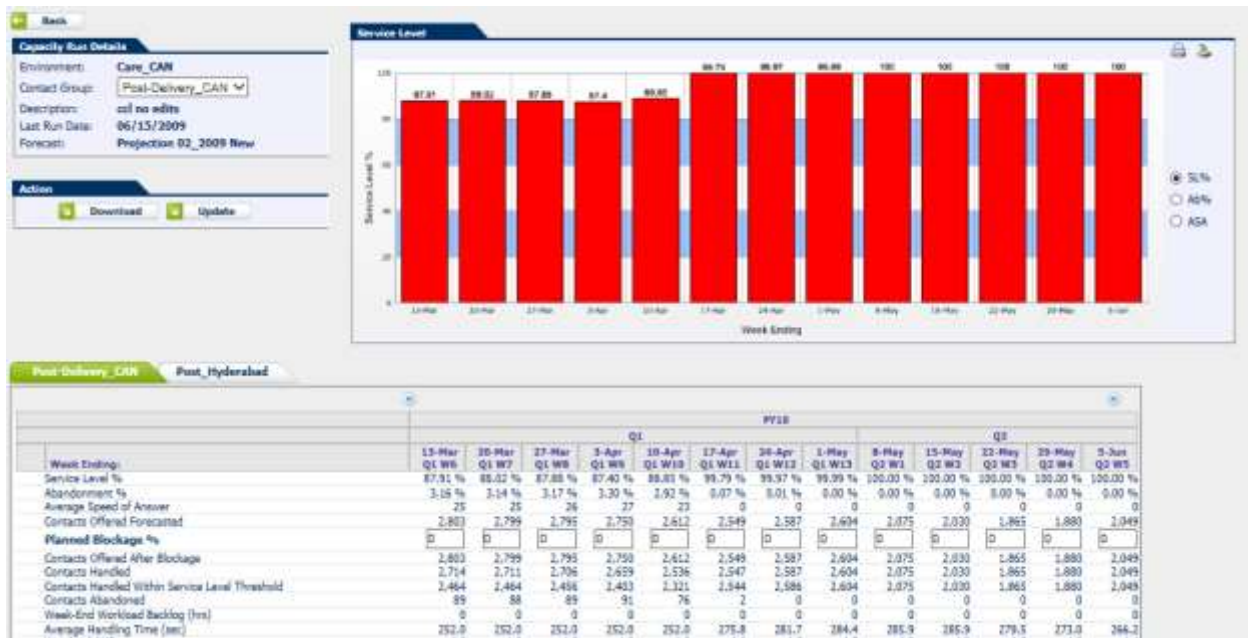
Figure content (Capacity Analysis Editing screenshot):

Capacity Run Details
Environment: Care_CAN
Contact Group: Post-Delivery_CAN
Description: col no edits
Last Run Date: 06/15/2009
Forecast: Projection 02_2009 New

Action: Download | Update

Service Level chart — legend: SL%, AB%, ASA

| Week Ending | 13-Mar Q1 W6 | 20-Mar Q1 W7 | 27-Mar Q1 W8 | 3-Apr Q1 W9 | 10-Apr Q1 W10 | 17-Apr Q1 W11 | 24-Apr Q1 W12 | 1-May Q1 W13 | 8-May Q2 W1 | 15-May Q2 W3 | 22-May Q2 W3 | 29-May Q2 W4 | 5-Jun Q2 W5 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Service Level % | 87.91 % | 88.02 % | 87.88 % | 87.40 % | 88.81 % | 99.79 % | 99.97 % | 99.99 % | 100.00 % | 100.00 % | 100.00 % | 100.00 % | 100.00 % |
| Abandonment % | 3.16 % | 3.14 % | 3.17 % | 3.30 % | 2.92 % | 0.07 % | 0.01 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % | 0.00 % |
| Average Speed of Answer | 25 | 25 | 26 | 27 | 23 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Contacts Offered Forecasted | 2,803 | 2,799 | 2,795 | 2,750 | 2,612 | 2,549 | 2,587 | 2,604 | 2,075 | 2,030 | 1,865 | 1,880 | 2,049 |
| Planned Blockage % | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Contacts Offered After Blockage | 2,803 | 2,799 | 2,795 | 2,750 | 2,612 | 2,549 | 2,587 | 2,604 | 2,075 | 2,030 | 1,865 | 1,880 | 2,049 |
| Contacts Handled | 2,714 | 2,711 | 2,706 | 2,659 | 2,536 | 2,547 | 2,587 | 2,604 | 2,075 | 2,030 | 1,865 | 1,880 | 2,049 |
| Contacts Handled Within Service Level Threshold | 2,464 | 2,464 | 2,456 | 2,433 | 2,321 | 2,544 | 2,586 | 2,604 | 2,075 | 2,030 | 1,865 | 1,880 | 2,049 |
| Contacts Abandoned | 89 | 88 | 89 | 91 | 76 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Week-End Workload Backlog (hrs) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Average Handling Time (sec) | 252.0 | 252.0 | 252.0 | 252.0 | 252.0 | 275.8 | 281.7 | 284.4 | 285.9 | 285.9 | 279.5 | 273.0 | 266.2 |

**Figure 4.12 – Capacity Analysis Editing**

The Capacity Analysis Editing page contains four components, Each of which is described in more detail in the following sections.

### 4.2.3.2.1  Capacity Run Details

The Capacity Run Details component controls the selection of the Contact Group that is displayed in the page.  It also displays basic information relating to the Capacity Planning Run.

### 4.2.3.2.2  Action

The Action component allows downloading of the displayed information, and also enables the changes entered on the page to be applied.  Selecting the *Update* button causes the changes entered to be saved to the database, and values, such as the Service Level, to be recalculated as necessary.

### 4.2.3.2.3  Service Level

The Service Level component displays a chart with the service levels displayed as a bar chart for the weeks displayed on the page.  The chart is automatically updated as necessary when the user selects the *Update* button to accept any changes entered on the page.

### 4.2.3.2.4  Queue Level Data

The Queue Level Data component occupies the lower portion of the page, and displays the Capacity Planning Run data related to the Contact Groups, and the Vendor (OSP) and Non-vendor (corporate) Organizational Units.  The first tab corresponds to the Contact Group, and contains the overall Contact Group information.  The following tabs each correspond to a Non-vendor (corporate) Organizational Unit.  The final tab, which always has the name OSP, will only appear if there are Vendor (OSP) Organizational Units supporting the selected Contact Group.  These tabs are described in detail in the following sections.

#### 4.2.3.2.4.1 Contact Group Tab

The Contact Group Tab, which carries the name of the selected Contact Group, displays the Capacity Planning run data at the contact group level, and allows editing of the Planned Blockage percentage. The tab appears as in Figure 4.13, and the individual data items are described in the following sections.



**Figure 4.13 – Contact Group Tab**

##### 4.2.3.2.4.1.1 Service Level %

The *Service Level Percentage* is calculated at the overall Contact Group level, and is the estimated percentage of contacts answered within the pre-selected wait time threshold. The wait time threshold is specified in the Service Profile (see section 2.1 above).

##### 4.2.3.2.4.1.2 Abandonment %

The *Abandonment Percentage* is calculated at the overall Contact Group level, and is the estimated percentage of contacts that abandon before being answered.

##### 4.2.3.2.4.1.3 Average Speed of Answer

The *Average Speed of Answer* is the number of seconds, on average, it is estimated that contacts will have to wait in the queue before they are answered. It is calculated at the Contact Group level.

##### 4.2.3.2.4.1.4 Calls Offered Forecasted

The *Calls Offered Forecasted* is the original number of contacts that were forecasted to be offered, before adjusting for Planned Blockage.

##### 4.2.3.2.4.1.5 Planned Blockage

The *Planned Blockage* is a user-editable field that specifies the percentage of contacts that will be intentionally blocked. By default, these values are zero. The user may enter a percentage value and click the update button, to have the service levels for the week in question recalculated.

##### 4.2.3.2.4.1.6 Calls Offered After Blockage

The *Calls Offered After Blockage* field displays the number of contacts offered, as adjusted by any Planned Blockage entered by the user. The value is changed to reflect the new blockage when the user clicks on the Update button.

### 4.2.3.2.4.1.7 Calls Handled

The *Calls Handled* field displays the estimated number of contacts handled, calculated at the Contact Group level. The value may change when other factors are modified by the user.

### 4.2.3.2.4.1.8 Calls Handled Within Service Level Threshold

The *Calls Handled Within Service Level Threshold* field displays the estimated number of contacts handled before the wait-time threshold, as specified in the Service Profile used for the Contact Group in the Capacity Planning run (see section 2.1 above).

### 4.2.3.2.4.1.9 Calls Abandoned

The Calls Abandoned field displays the estimated number of contacts that would be abandoned, calculated at the Contact Group level.

### 4.2.3.2.4.1.1 Weighted AHT

The *Weighted AHT* field displays the estimated AHT (Average Handling Time) calculated at the Contact Group level, as the combination of the AHT at individual Organizational Units supporting the Contact Group.

### 4.2.3.2.4.1.2 Total Current Floor Head Count

The *Total Current Floor Head Count* field displays the existing total number of agents supporting the specific Contact Group. In the case of blended queues, where some Organizational Units support multiple Contact Groups, the existing agents are effectively distributed among the Contact Groups, depending on the options selected in the site allocation table.

### 4.2.3.2.4.1.3 Required Floor Head Count

The *Required Floor Head Count* field displays the estimated number of agents required to cover the contacts offered, given the service level requirements specified in the Service Profile.

### 4.2.3.2.4.1.4 Total New Hires Start Training

The *Total New Hires Start Training* field displays the total of all new hires that are starting training, in all the Organizational Units servicing the specific Contact Group.

### 4.2.3.2.4.1.5 Planned Attrition

The *Planned Attrition* field displays the total of all planned attrition configured for each Organizational Unit servicing the specific Contact Group.

### 4.2.3.2.4.1.6 Total Overtime (hours)

The *Total Overtime* field displays the total of all overtime configured for each Organizational Unit servicing the specific Contact Group.

### 4.2.3.2.4.1.7 Total VTO (hours)

The *Total VTO* (Volunteer Time Off) field displays the total of all VTO configured for each Organizational Unit servicing the specific Contact Group.

### 4.2.3.2.4.1.8 Total New Hires in Training

The *Total New Hires In Training* field displays the total of all New Hires in Training for each Organizational Unit servicing the specific Contact Group.

*4.2.3.2.4.1.9 CRW*

The *CRW* (Calls per Rep per Week) field displays the estimated number of calls each agent would expect, on average, during the week, for those agents servicing the specific Contact Group.

*4.2.3.2.4.1.10 CRW SL*

The *CRW SL* (Calls per Rep per Week within Service Level) field displays the estimated number of calls each agent would expect to answer within the Waiting Time Threshold, on average, during the week, for those agents servicing the specific Contact Group.

*4.2.3.2.4.1.11 Total Corporate Site Calls Handled*

The *Total Corporate Site Calls Handled* field displays the estimated total calls that would be handled by the Organizational Units representing the corporate, or non-vendor, sites.

*4.2.3.2.4.1.12 Total OSP Calls Handled*

The *Total OSP Calls Handled* field displays the estimated total calls that would be handled by the Organizational Units representing the vendor, or OSP, sites.

*4.2.3.2.4.1.13 OSP Calls Handled (%)*

The *OSP Calls Handled Percentage* field displays the Total OSP Calls Handled as a percentage of the Overall Total Calls Handled.

*4.2.3.2.4.1.14 Total Corporate Site Calls Offered*

The *Total Corporate Site Calls Offered* field displays the total calls allocated to Organizational Units representing the corporate, or non-vendor, sites.

*4.2.3.2.4.1.15 Total OSP Calls Offered*

The *Total OSP Calls Offered* field displays the total calls allocated to Organizational Units representing the vendor, or OSP, sites.

*4.2.3.2.4.1.16 Required Capacity*

The *Required Capacity* field displays the number of contacts estimated required by the system.

**4.2.3.2.4.1 Corporate Site (Non-vendor) Organizational Unit Tab**

The Corporate Site (Non-vendor) Organizational Unit Tabs appear after the Contact Group Tab, one for each non-vendor Organizational Unit serving the selected Contact Group. Each tab is named according to the corresponding Organizational Unit. The tab appears as in Figure 4.14. The fields displayed are described in detail in the following sections.

| Week Ending | FY10 | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Q1 | | | | | | | | Q2 | | | | |
| | 13-Mar Q1 W6 | 20-Mar Q1 W7 | 27-Mar Q1 W8 | 3-Apr Q1 W9 | 10-Apr Q1 W10 | 17-Apr Q1 W11 | 24-Apr Q1 W12 | 1-May Q1 W13 | 8-May Q2 W1 | 15-May Q2 W2 | 22-May Q2 W3 | 29-May Q2 W4 | 5-Jun Q2 W5 |
| **Floor Head Count** | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 |
| **Productive Head Count** | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 |
| Inactive Attrition | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Active Attrition | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 |
| Returning from LOA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Departing to LOA | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Planned Attrition** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **New Hires Start Training** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| New Hires in Training | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| New Hires Attrition | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| New Hires Entering TQ (Projection) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Conversions Entering Production | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Conversions Training (Leaving) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Transfers In | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Transfers Out | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Returning from Project | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Departing to Project | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Overtime/Agent (Hours/Tenured)** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **VTO/Agent (Hours/Tenured)** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Calls Offered | 2,803 | 2,799 | 2,795 | 2,750 | 2,612 | 2,549 | 2,587 | 2,604 | 2,075 | 2,030 | 1,865 | 1,880 | 2,049 |
| Calls Handled | 2,714 | 2,711 | 2,706 | 2,659 | 2,536 | 2,481 | 2,516 | 2,523 | 2,041 | 1,999 | 1,843 | 1,858 | 2,015 |
| Calls Handled Within Service Level Threshold | 2,464 | 2,464 | 2,456 | 2,403 | 2,321 | 2,291 | 2,317 | 2,304 | 1,947 | 1,913 | 1,785 | 1,798 | 1,923 |
| Calls per Rep per Week | 243 | 243 | 243 | 240 | 229 | 225 | 228 | 230 | 186 | 183 | 169 | 171 | 186 |
| Calls Within Service Level per Rep per Week | 220 | 221 | 221 | 217 | 210 | 207 | 210 | 210 | 178 | 175 | 164 | 165 | 177 |
| Average Handling Time | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 | 4.2 |
| Support Staff | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Support Staff Cost | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Tenured Agents Cost | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Non-Tenured Agents Cost | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

**Figure 4.14 – Corporate Site (Non-vendor) Organizational Unit Tab**

### 4.2.3.2.4.1.1 Floor Head Count

The *Floor Head Count* displays the existing number of agents in the Organizational Unit, including any new hires out of training, as configured in this edit page and updated by the user.

### 4.2.3.2.4.1.2 Productive Head Count

The *Productive Head Count* field displays the Floor Head Count adjusted by the appropriate productivity.

### 4.2.3.2.4.1.3 Inactive Attrition

The *Inactive Attrition* field displays the expected inactive attrition, or terminations, as shown in the Site Data module.

### 4.2.3.2.4.1.4 Active Attrition

The *Active Attrition* field displays the expected active attrition, or promotions, as shown in the Site Data module.

### 4.2.3.2.4.1.5 Returning from LOA

The *Returning from LOA* field displays the number of tenured agents returning from a leave of absence, as shown in the Site Data module.

### 4.2.3.2.4.1.6 Departing to LOA

The *Departing to LOA* field displays the number of tenured agents departing to a leave of absence, as shown in the Site Data module.

### 4.2.3.2.4.1.7 Planned Attrition

The *Planned Attrition* field displays the number of tenured agents planned to be terminated, which can be edited by the user.

### 4.2.3.2.4.1.8 New Hires Start Training

The *New Hires Start Training* field displays the number of new hires scheduled to begin the training program. The number of new hires is initialized from the Site Data module, and may be edited by the user as part of the capacity planning run. The new hires are automatically assigned to the training queue after the number of weeks specified by the New Hire Training Weeks data item in the Site Data module.

### 4.2.3.2.4.1.9 New Hires in Training

The *New Hires in Training* field displays the sum of the agents in the training weeks of the ramp.

### 4.2.3.2.4.1.10 New Hires Attrition

The *New Hires Attrition* field displays the estimated attrition among new hires, as calculated using the New Hires Attrition data item in the Site Data module.

### 4.2.3.2.4.1.11 New Hires Entering TQ (Projection)

The *New Hires Entering TQ* (Projection) field displays the estimated number of new hires entering the training queue for the week, which is the number of New Hires that would finish training that week, reduced by the estimated New Hires Attrition.

### 4.2.3.2.4.1.12 Conversions Entering Production

The *Conversions Entering Production* field displays the number of agents transferring into this queue from a different queue that are not immediately counted as tenured. This field is initialized from the Site Data module.

### 4.2.3.2.4.1.13 Conversions Training (Leaving)

The *Conversions Training* (Leaving) field displays the number of agents transferring out of this queue and into a different queue where they are not immediately counted as tenured. This field is initialized from the Site Data module.

### 4.2.3.2.4.1.14 Transfers In

The *Transfers-In* field displays the number of agents transferring in to the queue that are already trained for the queue and therefore are immediately counted as tenured. This field is initialized from the Site Data module.

### 4.2.3.2.4.1.15 Transfers Out

The *Transfers-Out* field displays the number of agents transferring out of the queue that are transferring to another queue for the same Contact Group. This field is initialized from the Site Data module.

### 4.2.3.2.4.1.16 Returning From Project

The *Returning from Project* field displays the number of tenured agents that are returning to the queue after being away working on a project. This field is initialized from the Site Data module.

### 4.2.3.2.4.1.17 Departing To Project

The *Departing To Project* field displays the number of tenured agents that are leaving the queue to work on a project. This field is initialized from the Site Data module.

### 4.2.3.2.4.1.18 Overtime/Agent (Hours/Tenured)

The *Overtime/Agent* field displays the number of hours of overtime assigned to each tenured agent. This field may be edited by the user, and when the user clicks the Update button, the service levels for the week are recalculated as necessary.

### 4.2.3.2.4.1.19 VTO/Agent (Hours/Tenured)

The *VTO/Agent* field displays the number of hours of VTO (Volunteer Time Off) assigned to each tenured agent.  This field may be edited by the user, and when the user clicks the Update button, the service levels for the week are recalculated as necessary.

### 4.2.3.2.4.1.20 Calls Offered

The *Calls Offered* field displays the total number of calls offered allocated to the Organizational Unit.  For blended queues, this includes contributions from all the corresponding Contact Groups.

### 4.2.3.2.4.1.21 Calls Handled

The *Calls Handled* field displays the estimated total number of calls handled by this Organizational Unit.  For blended queues, this includes contributions from all the corresponding Contact Groups.

### 4.2.3.2.4.1.22 Calls Handled Within Service Level Threshold

The *Calls Handled within Service Level Threshold* field displays the estimated total number of calls handled within the service level wait time threshold, as specified by the appropriate Service Profile, for this Organizational Unit.

### 4.2.3.2.4.1.23 Calls per Rep per Week

The *Calls per Rep per Week* field displays the estimated number of calls each agent should be expected to handle during the week.

### 4.2.3.2.4.1.24 Calls within Service Level per Rep per Week

The *Calls within Service Level per Rep per Week* field displays the estimated number of calls each agent should be expected to handle within the service level Wait Time Threshold, as specified by the appropriate Service Profile, during this week.

### 4.2.3.2.4.1.25 Average Handling Time

The *Average Handling Time* field displays the weighted Average Handling Time for the Organizational Unit, blended over the agents in different levels of the training ramp.

### 4.2.3.2.4.1.26 Support Staff

The *Support Staff* field displays the total number of estimated support staff, calculated according to the total Floor Head Count, and the ratios defined in the Staff Ratios category in the Site Data module.

### 4.2.3.2.4.1.27 Support Staff Cost

The *Support Staff Cost* field displays the total estimated cost of support staff, calculated according to the costs defined in the Staff Pay-grade Midpoints category in the Site Data module.

### 4.2.3.2.4.1.28 Tenured Agents Cost

The *Tenured Agents Cost* field displays the total estimated cost of tenured agents, calculated according to the tenured agent cost defined in the Staff Pay-grade Midpoints category in the Site Data module.

### 4.2.3.2.4.1.29 Non-Tenured Agents Cost

The *Non-Tenured Agents Cost* field displays the total estimated cost of non-tenured agents, calculated according to the non-tenured agent cost defined in the Staff Pay-grade Midpoints category in the Site Data module.

### 4.2.3.2.4.2 OSP Site (Vendor) Organizational Units Tab

The OSP Site (Vendor) Organizational Units Tab appears in the last position, when there are OSP, or Vendor, Organizational Units serving the selected Contact Group. The tab appears as in Figure 4.15. The Organizational Unit data is grouped by field. The fields displayed are described in detail in the following sections.



**Figure 4.15 – OSP Site (Vendor) Organizational Units Tab**

#### 4.2.3.2.4.2.1 Calls Handled

The *Calls Handled* fields display the estimated calls handled by Corporate, or non-vendor, Organizational Units. They duplicate the information on the individual Organizational Unit Tabs, but are included here for reference.

#### 4.2.3.2.4.2.2 Calls Handled Cap

The *Calls Handled Cap* (Capacity) fields display the number of calls each OSP, or vendor, Organizational Unit has the capacity to handle.

#### 4.2.3.2.4.2.3 Total Handled by Site

The *Total Handled by Site* field displays the total number of calls handled by all the Organizational Units, both Corporate (non-vendor) and OSP (vendor).

#### 4.2.3.2.4.2.4 Calls Offered

The *Calls Offered* fields display the estimated calls offered to each Corporate, or non-vendor, Organizational Unit. They duplicate the information on the individual Organizational Unit Tabs, but are included here for reference.

#### 4.2.3.2.4.2.5 Calls Offered Allocation

The *Calls Offered Allocation* fields display the number of calls each OSP, or vendor, Organizational Unit has been allocated to receive.

#### 4.2.3.2.4.2.6 Total Offered by Site

The *Total Offered by Site* field displays the total number of calls offered to all the Organizational Units, both Corporate (non-vendor) and OSP (vendor).

#### 4.2.3.2.4.2.7 Percent of Calls Handled Capacity

The *Percent of Calls Handled Capacity* fields display the percentage of an OSP (vendor) Organizational Unit's preconfigured handled capacity that should be assigned. Initially, 100% of the capacity is assigned, but the user may adjust the percentage. After clicking the Update button, the service levels and other fields will be updated as appropriate.

### 4.2.3.3  Forecast Results View

Clicking on the *View* icon in the Forecasts column displays the Forecast Results page, as shown in Figure 4.16. The data may be displayed in a number of bucket sizes, and a specific date range may be selected. Call volume and AST (Average Service Time, or Average Handling Time) is displayed, both the actual values (when available), and the values forecasted.



**Figure 4.16 – Forecast Results View**

### 4.2.3.4  Forecast Results Download

The data as described in section 4.2.3.3 (above) may be downloaded by clicking on the *Download* icon in the Forecasts column, for the appropriate Contact Group.

### 4.2.3.5  Forecast Results Graph

Clicking on the *Chart* icon in the Forecasts column for a particular Contact Group displays the Forecast Results Graph page, as shown in Figure 4.17. The user may select to view the Contact volume, or the Handling Time (Service Time), and may choose to display the Forecasted values and/or the Actual values, and the accuracy, for the selected date range.

The data as configured and displayed in the chart may also be downloaded to a spreadsheet format for further external analysis.
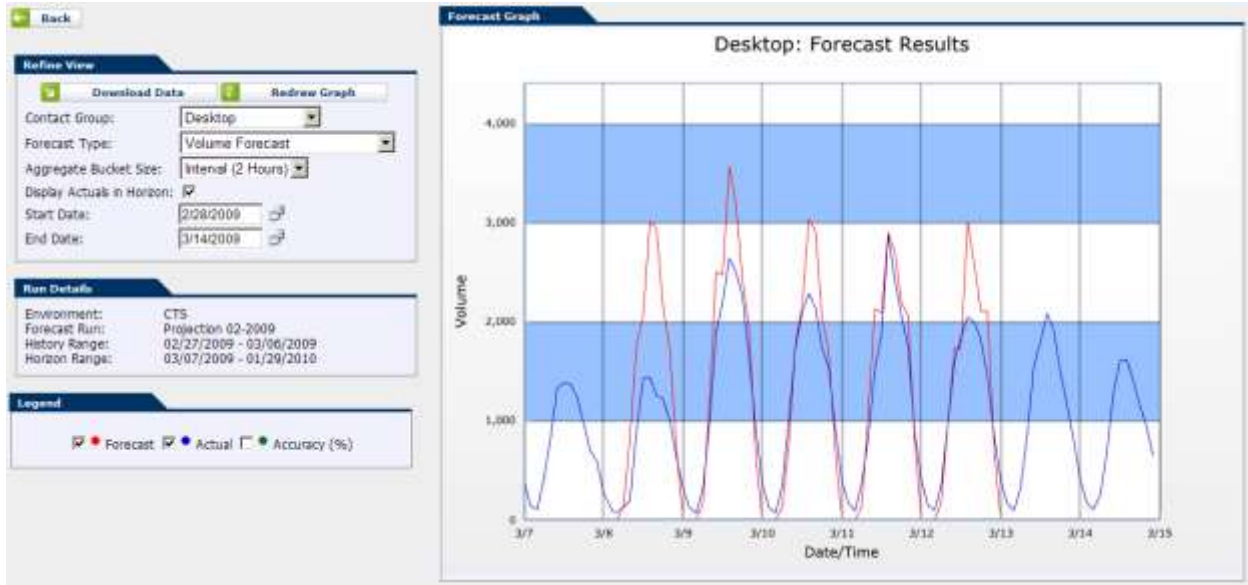
**Figure 4.17 – Forecast Results Graph**

## 4.2.4 Detailed Statistics

The *Detailed Statistics* screen provides a summary of the run on a contact group level. You can switch between contact groups by changing the selected contact group. You may also download the report to be saved in Excel. This can be seen in *Figure 4.18*.



**Figure 4.18 – Detailed Statistics**

Selecting the *Back* button will close these details and return you to the *Capacity Analysis* page.

## 4.3  New Capacity Planning Run

In order to generate a new requirement run, the user must submit a new job using the New Capacity Planning Run module. Click *Planning -> Capacity Planner -> New Capacity Planning Run* to reach this module. The module is shown in Figure 4.19.

**Figure 4.19 – New Capacity Planning Run**

## 4.3.1 Configuration

The user must select an *Environment*, *Forecast Results Run*, *Service Profile, and Site Allocation Table,* and provide a *Description* at a minimum.  A Schedule Inefficiency factor may be specified if necessary.

Clicking *Submit New Capacity Planning Run* will create a new job and display this in the *Manage Capacity Planning Runs* module.  Cancel will take you back to the *Manage Capacity Planning Runs* module.

## 4.3.2 Advanced Configuration

The *Advanced Configuration* display (4.20) is reached by clicking *Advanced*.  This page provides granular configuration of a capacity planning run down to the Contact Group level. You can specify the Service Profile and Schedule Inefficiency for each Contact Group.  You may also exclude a particular contact group to simply use the default settings.

**Figure 4.20 – Advanced Configuration**

Once the configuration has been set, simply click Submit New Capacity Planning Run to submit the job as you would do with the Basic module.

## 4.4  What-If

The *What-If* feature is used to compare the results of different capacity planner runs.  This feature is accessible by selecting at least one run, checking the box in the leftmost column of the run, and clicking on the *Compare* button from the *Manage Capacity Planning Runs* page, as shown in Figure 4.21.   Up to five runs may be compared at once.

**Figure 4.21 – Manage Requirement Runs**

To use the *What-If* feature, after the page loads with the run information for the run(s) selected, the user can add additional runs to compare in the *Select Run* area by highlighting the run and then clicking on the *Green* "+" icon on the right, as shown in Figure 4.22. This will add the run to the list of runs to compare. After selecting each run, the page will reload with data from the run added. If desired, select other measure in the *Select Measures* area and click the *Redraw* button. Runs may be removed by clicking on the *Red* "x" icon to the right of the run in the Description section.

ASA, SL, Ab%, agent requirements, FTE, agent occupancy, contact volume and AHT forecasts may be compared for the Capacity Planner runs.



**Figure 4.22 – What-If Refine View/Forecast Graph**

# 5   Upload

The Upload submenu in the Capacity Planner menu enables users to upload forecasts and blockage percentages for Contact Groups, as described in the following sections.

## 5.1 Upload Forecasts

The *Upload Forecasts* module appears as in Figure 5.1. The module contains three components that enable configuration of the forecasts to be uploaded. These are described in the following sections. Forecasts can be uploaded for both inbound and outbound call types. Outbound will offer the choice to use either right part connect data or connect data.



**Figure 5.1 – Upload Forecasts**

### 5.1.1 Run Parameters

The Run Parameters component is used to configure the high-level parameters for the forecast run that is created when the forecast data is uploaded. The data must be identified with an environment, a start and end date, and a bucket size. Optionally, a special event profile may be selected to be applied to the uploaded data. Once these parameters are configured, a template for the data may be downloaded by clicking on the *Download Template* button. The Publish Forecast option may be checked to have the system automatically publish the new forecast run that is created. If this option is not checked, the user may still publish the new run at a later time, by viewing the Forecast run in the Forecast Run Manager (refer to the *Forecaster User Manual* for more information).

### 5.1.2 History Parameters

The History Parameters component is used to configure how the upload process is to build interval data based on the uploaded forecast data, which may be at a higher bucket size. The following fields may be configured for each Contact Group.

#### 5.1.2.1 Prototype Contact Group

By default, the existing data for a contact group will be used to develop the interval pattern from the uploaded forecast data. A user may choose to use the data from a different Contact Group as a pattern, which is especially useful when there is, in fact, no current data for the specific Contact Group. Another option is Even Distribution which is to be used when no interval level history is available. This option will distribute the data evenly over every interval.

### 5.1.2.2 Analysis Interval

The Analysis Interval is the period of time over which the reference data will be examined to determine the pattern. The default selection is Most Recent Period, which additionally requires a number of weeks to be selected. The default number of weeks is 4. This reflects the assumption that the future interval pattern will be most similar to the average pattern of the most recent four weeks. The other options for Analysis Interval are Previous Year, which averages the pattern available for one year before the start date, and Entire History, which includes all available historic data in the prototype contact group or by date range.

### 5.1.2.3 Start Date and End Date

The *Start and End Date* fields are updated to reflect the selection in the Analysis Interval field. The use may further refine the date range used to generate the interval pattern by modifying one or both of the Start and End dates.

## 5.1.3 Upload Forecast Data

The Upload Forecast Data component allows selection of the comma-delimited text file containing the forecast data to be uploaded. Clicking on the Save Forecast Run button uploads the data and launches the process to derive the interval-level data, creating a new Forecast Run to contain the data, and automatically publishing the run when the Publish Forecast option is checked.

# 5.2 Upload Blockage Percentages

The *Upload Blockage Percentages* module allows uploading of weekly Contact Group planned contact volume blockages. The module appears as shown in Figure 5-2. The three components in this module are described in the following sections.



**Figure 5.2 – Upload Blockage Percentages**

## 5.2.1 Run Parameters

The Run Parameters component allows selection of the Environment, and the date range for which blockages should be viewed. Clicking on the View button displays the existing blockage settings for Contact Groups in the selected Environment (see section 5.2.2). Clicking on the Download Template will download an empty text file formatted for entering the blockage percentage values, which can be uploaded to insert the new values (see section 5.2.3).

## 5.2.2 Current Blockage Percentages

The Current Blockage Percentages component displays the current values for blockage for each of the contact groups in the selected environment, for each week in the selected date range.

## 5.2.3 Upload Blockage Percentages

The Upload Blockage Percentages component allows the user to select the comma-delimited text file containing new blockage percentage values, and to upload the file for processing. A blank template file may be downloaded first by clicking the *Download Template* button in the Run Parameters component (see section 5.2.1 above).

# 6 Capacity Reports

The Capacity Reports submenu in the Capacity Planner menu provides access to view official capacity reports, to configure those reports (for users with permission to configure reports), and to export forecasts. These functions are described in the following sections.

## 6.1 View Reports

The View Reports menu option displays the Capacity Report viewer, as shown in Figure 6.1 below. The available reports are configured using the *Configure Reports* module, as described in section 6.2 (below). Some of the reports are preconfigured. The user may select the report to view using the *Select Report* drop-down list. When changed, the new report will automatically be displayed. Reports may be created for either Contact Group or Organizational Unit levels. For those reports that are configured for Contact Group level, the Select Contact Group drop-down list will appear. For those reports that are configured for Organizational Unit level, the Select Organizational Unit drop-down list will appear. In both cases, the user may limit the Contact Groups or Organizational Units listed by selecting the appropriate Environment from the Select Environment drop-down list. The user may choose to display data for all Contact Groups or Organizational Units by selecting the All option.



**Figure 6.1 – Capacity Report Viewer**

The report may be downloaded in Excel spreadsheet format by clicking on the *Download* button. The downloaded excel file will include the formatting and dated headers as displayed on the web page.

Built-in reports and charts available in the View Reports module are described in more detail in section 4.2.3.1, above.


## 6.2  Configure Reports

The Configure Reports menu option displays the Configure Capacity Reports module, as shown in Figure 6.2.  The Custom Report Configuration component, on the left side of the page, contains the list of reports configured in the system.  Interaction with the component is primarily through the context menu, which is accessed by right-mouse-clicking on items in the list.
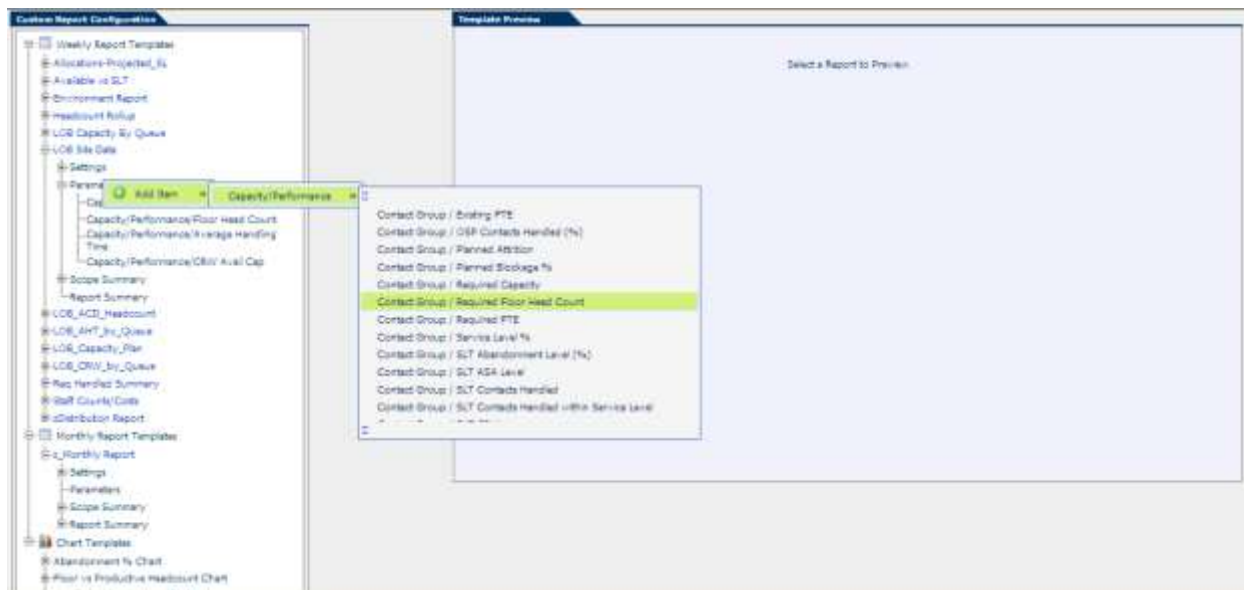


**Figure 6.2 – Configure Capacity Reports**


### 6.2.1 Add New Report Template

A new report may be created by right-clicking on the Report Templates item, and selecting Add Report Template at either the **Weekly** or **Monthly** level.


### 6.2.2 Delete Report Template

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


### 6.2.3 Report Templates

Reports have four sets of properties that can be configured in the Custom Report Configuration component.  These sets of properties are described in the following sections.

#### 6.2.3.1  Settings

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

- The Scope may be configured at the Environment, Business Unit, Organizational Unit, Contact Group, or Stream level. The scope level selected limits the levels at which aggregation can take place.

- The layout selected may be either Landscape or Portrait, which determines whether the fields are arranged as rows or columns in the displayed report.

- The permission selected can control what users are able to access the report to view. Public reports are viewable by any user; Private reports are viewable only by authorized users.

### 6.2.3.2 Parameters

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

A parameter may be removed by right-clicking on the parameter, and then selecting the Remove Item menu option.

### 6.2.3.3 Scope Summary

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

### 6.2.3.4 Report Summary

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

## 6.2.4 Chart Templates

Chart template properties are similar to report template properties. In the case of Charts, there is only one set of Parameters available. These parameters are displayed as elements in the chart.

In addition to Scope and Permission in the Settings properties, there is also a selection for chart type. The type selected may be either Bar chart, or Line chart.

## 6.3 Export Forecast

The Export Forecasts menu item in the Capacity Planner, Capacity Reports menu, provides a breakdown of forecasts on an Organizational Unit level. The Export Forecast Breakdown module appears as in Figure 6.3. The user may select an Environment, and then a start and end date, and click on the Export Forecast button to download a distribution of the official capacity plans and forecasts for the Organizational Units within the selected Environment. The report is generated at Interval level, and is returned in multi-worksheet Excel Spreadsheet format.

**Figure 6.3 – Export Forecast Breakdown**

# 7 Administration & System Settings

The *Capacity Planning* module adds an additional component to the Administration System Settings menu. This component is the Fiscal Calendar manager, which is described in the following section.

## 7.1 Fiscal Calendar

The Fiscal Calendar is accessed by selecting the Administration menu, the System Settings sub-menu, and the Fiscal Calendar menu item. The page appears as in Figure 7.1.



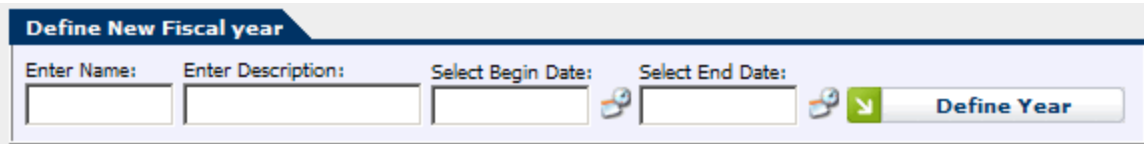| Name | | Description | Begin Date | End Date | Action |
|------|------|-------------|------------|----------|--------|
| *Year:* | FY09 | Fiscal Year 2009 | 2/2/2008 | 1/31/2009 | |
| *Quarters:* | Q1 | Quarter 1 | 2/2/2008 | 5/3/2008 | |
| | Q2 | Quarter 2 | 5/3/2008 | 8/2/2008 | |
| | Q3 | Quarter 3 | 8/2/2008 | 11/1/2008 | |
| | Q4 | Quarter 4 | 11/1/2008 | 1/31/2009 | |
| *Year:* | FY10 | Fiscal Year 2010 | 1/31/2009 | 1/30/2010 | |
| *Quarters:* | Q1 | Quarter 1 | 1/31/2009 | 5/2/2009 | |
| | Q2 | Quarter 2 | 5/2/2009 | 8/1/2009 | |
| | Q3 | Quarter 3 | 8/1/2009 | 10/31/2009 | |
| | Q4 | Quarter 4 | 10/31/2009 | 1/30/2010 | |
| *Year:* | FY11 | Fiscal Year 2011 | 1/30/2010 | 1/29/2011 | |
| *Quarters:* | Q1 | Quarter 1 | 1/30/2010 | 5/1/2010 | |
| | Q2 | Quarter 2 | 5/1/2010 | 7/31/2010 | |
| | Q3 | Quarter 3 | 7/31/2010 | 10/30/2010 | |
| | Q4 | Quarter 4 | 10/30/2010 | 1/29/2011 | |

**Figure 7.1 – Fiscal Calendar**

The Fiscal Year defined for a company does not necessarily match the Calendar year, so the details of the Fiscal Year must be entered into the Fiscal Calendar Manager and managed by a user with Administrative privileges. The settings in this page are used throughout the Capacity Planning Module to display dated headings on reports.

Each year is divided into four Fiscal Quarters. Each year ends on the day the following year begins, and each quarter ends on the day the following quarter begins. The cut-over time is assumed to be midnight.

A fiscal year and it's quarters may be edited by clicking on the appropriate Edit icon. New dates for the begin and end of each quarter and the year may be selected. Finally, the OK icon may be clicked to accept the changes, or the Cancel icon to reset to the previous values and cancel the editing. Dates are checked for overlap, and if any overlap occurs, a warning message will be displayed and the changes not accepted.

A new fiscal year may be added using the Define New Fiscal Year component, which appears as in Figure 7.2.



**Figure 7.2 – Define New Fiscal year**

A name and description for the new fiscal year must be entered, and also a begin and end date. Clicking the Define Year button will create the new Fiscal Year and add it to the list of Fiscal Years on the page. If there is an overlap with an existing Fiscal year, a warning will be displayed and the new Fiscal Year will not be created. Four Fiscal Quarters spread evenly over the new Fiscal Year time frame are created automatically. The dates for these quarters may be modified using the Manage Fiscal Calendar component.