

inContact Workforce Management v2 Capacity Planner Web Site User Manual

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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 **<u>AWO Scheduler User Manual</u>**.

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 inContact Workforce Management v2 Capacity Planner Web Site User Manual

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.

Profile	Service To	ASA (sec)	Ocrapancy %	Abandonment %	User	Last Hot	lified	Act	ion
ac2 Budget Profile	80	N/A	N/A	N/A	Admin, Demo	3/9/2008	7:54 PM	17	
Test Scenario 1	75	N/A	N/A	N/A	Admin, Demo	11/7/2007	4:47 PM	R.	
Test Scenario 2	N/A.	N/A	N/A	3	Admin, Demo	11/7/2007	4:48 PM	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.

Add New Profile	
Name:	
	Add Profile

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.

ew Service Profile				
Back				
	User: Admin, Demo	Date Created: 03/09/2008	19:54:28	
	Profile: ac2 Budget Profile	Date Modfied: 03/09/2008	19:54:39	
Call Service Ta	rgets		Data Analysis P	arameters
Service Level: 🔄 80 Profit Optimization:	% of Contacts Answered in 20 Seconds		nment Percentage; Adjustment Factor:	25 % at an AWT of 360 Seconds 0 %
Service Target Profile: None		Average Service Time Before C	Adjustment Factor: Contact Work Time:	
Workload Ser	vice Targets		Contact Work Time:	
Service Window Type: Single				
Service Window: 120 Mi				
Multimedia Agent Productivity: 100 %				

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.

Save Profile X Cancel			
	User: Admin, Admin	Date Created: 05/11/2009 13:37:56	
	Profile: ac2 Budget Profile	Date Modified: 05/11/2009 13:37:56	
Call Service Tar	gets	Data Analysis	Parameters
Service Level: 🔛 🐻	No of Contacts Answered in 20 Seconds	Calculate Customer Abandonment Parameters	s: Manually
Average Speed of Answer: [1200	Seconds	Abandonment Percentage	25 % at an AWT of 360 Second
Maximum Occupancy: 🗖 100	96	Volume Adjustment Factor	11 0 No
Abandonment Level: 🗖 🖟	96	Average Service Time Adjustment Factor	17 0 Wa
Service Target Profile: None 💽	1	Before Contact Work Time	: 0 Seconda
Workload Serv	ke Targets	After Contact Work Time	e: 0 Seconds
Service Window Type: Single	-		
Service Window: 120 Minu	144		

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 **<u>AWO Portal</u> <u>Scheduler User Manual</u>**.

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.

Work	load Service Targets
Service Window Type:	Multiple 🔽
Service Window:	120 Minutes
Service Span:	00:00 🗸 _ 00:00 🗸
After Hours Contacts:	0 Minutes
Multimedia Agent Productivity:	100 %

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.

Service Target Profile	Description	User	Bucket Size	Created		Modified	E I	Ac
Test TA	Test	Admin, Admin	30 Minutes	3/10/2009	04:56 PM	3/10/2009	04:56 PM	17

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..

Add New Service Target Pro	ofile		
Name:	Description:	Bucket Size: 30 Minutes 💌 🔰	Add Table

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 1	arget Pro	file						
Back		User; Service Tan Description Bucket Size		Date Modified:	3/10/2009 04:56 3/10/2009 04:56			
Period		Service Level	Service Level Threshold (sec)	Average Speed of Answer (sec)	Abandonment Target (%)	Ahando (9		Average Walting Time (sec)
0 Saturday	00:00	80	20		0	0	3	2
1 Saturday	00:30	80	20	1	0	a	3	
2 Saturday	01:00	80	20	1	0	0	3	12
3 Saturday	01:30	80	20		.0	0	3	
4 Saturday	02:00	80	20		.0	0	3	
5 Saturday	02:30	80	20		0	0	3	
6 Saturday	03:00	80	20	1	0	0	3	
7 Saturday	03:30	80	20	1	0	0	3	13
8 Saturday	04:00	80 80	20	1	0	0	3	
9 Saturday	04:30	80	20	1	0	0	3	
10 Saturday	05:00	80	20		0	0	3	
11 Saturday	05:30	80	20		.0	0	3	34
12 Saturday	06:00	80	20		.0	0	3	13
13 Saturday	06:30	80	20		0	0	3	
14 Saturday	07:00	80	20		0	0	3	
15 Saturday	07:30	80	20 20	1	0	0	3	
10 Saturday	08:00	80 80	20		.0	0	3	
17 Saturday	08:30	80	20		0	0	3	
18 Saturday	09:00	80	20	1	0	0	3	
19 Saturday	09:30	88	20	1	0	0	3	17

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.

Sava Profile	Cane	User: Service Tar		Admin, Adm	in		3/10/2009 04:56 3/10/2009 04:56		
		Description: Bucket Size		Test 30 Minutes					
Period		Service Level		e Level old (sec)	Average Sp Answer (1		Abandonment Target (%)	Abandonment (%)	Average Waiting Time (sec)
0 Saturday	00:00	80	5	20	10		0	3	20
1 Saturday	00:30	80	12	20	10		0	3	20
2 Saturday	01:00	80	1	20	10	9 11	0	3	20
3 Saturday	01:30	80	2	20	10	1	0	3	20
4 Saturday	02:00	80	F	20	10		0	3	20
5 Saturday	02:30	80	2	20	10	<u> </u>	0	3	20
6 Saturday	03:00	80	2	20	10	<u> </u>	0	3	20
7 Saturday	03:30	80	1	20	10		0	3	20
8 Saturday	04:80	80	1	20	10	è	0	3	20
9 Saturday	04:30	80	12	20	10	<u>a</u> 11	0	3	20
10 Saturday	05:00	80	5	20	10		0	3	20

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.

			ronment:		CAN ·		Last Mod		8/2009 03					
		Org	anizational Ur	it: Emai	_Hyderabac		Last Acc	epted: 5/1	8/2009 03	54 PM				
	Site Date:		Shart Date:		Dates	-								
	AHT Ramp	1	5/15/2009	5781	14/2009	2	Retrieve	De	healme	Edit.	Act	ept		
							FY	10						
Week of:	15-Hay Q2 W2	22-May Q2 W3	29-May Q2 W4	5-3mm Q2 W5	12-Jun Q2 996	Q 19-Jun Q2 W7	2 26-3un Q2 W8	3-2ul Q2 W9	10-Jul Q2 W10	17-Jul Q2 W11	24-3ul Q2 W12	31-3ul	7-Aog Q3 W1	3 14-Aug Q3 W2
AHT Ramp W1	7.9	7.9	7.9	7.9	7.9	7.9	7.9	7.9	7.9	7.9	7.9	7.9	7,9	7
AHT Ramp W2	6.8	6.8	6.8	6.8	6.8	6.8	6.8	6.8	6.8	0,8	6.8	6.8	6,8	6
AHT Ramp W3	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6.1	6
AHT Ramp W4	5.9	5.9	5.9	5.9	5.9	5.9	5.9	5.9	5.9	5.9	5.9	5.9	5.9	5
AHT Ramp W5	5.6	5,6	5.6	5.6	5.6	5.6	5.6	5,6	5.6	5.6	5.6	5.6	5.6	5
AHT Ramp 106	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5,4	5.4	3
AHT Ramp W7	5.2	5.2	5.2	5.2	5.2	5.2	5.2	5.2	5.2	5.2	5.2	5.2	5.2	5
AHT Ramp W8	5	5	5	5	5	5	5	5	5	5	5	5	5	
AHT Ramp W9	5		5	5	5	5	5	5	5	5	5	5	5	
AHT Ramp W10	4.7	4,7	4.7	4.7	4.7	4.7	4.7	4.7	4.7	4.7	4,7	4.7	:4.7	
AHT Ramp W11	4.5	4.6	4.6	4.6	4.6	4.6	4.6	4.5	4.5	4.5	4.5	4.5	4.5	4
AHT Ramp W12	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4,5	4.5	4.5	4.5	4
AHT Ramp W13	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	- 4
AHT Ramp W14	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	.4.5	4.5	4.5	4.5	4.5	4.
		8												

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.

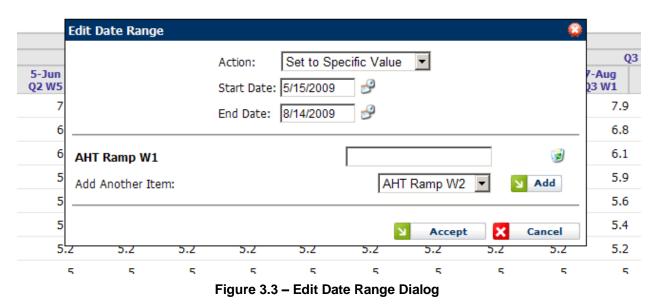
			Environ	ment:	Care_CAN	1	Las	t Modified:	5/8/2009	03:54 PM				
			Organiz	ational Unit:	Email_Hys	derabad	- Las	t Accepted:	5/8/2009	03:54 PM				
		Site Datas		Start	Datar	End Date:								
		AHT Ramp	6	* 5/15	V2000 5	8/14/2009	34	Retrieve	X Ca	ncel 🔡	Update	1		
		(4)												
								130						
				-	10000		22		11707-075	-			and the second second	0 3
Week al:	15-Hay Q2 W2	22-May Q2W3	29-Hay Q2 W4	S-Jun Q2 W5	12-Jun Q2 W6	19-Jun Q2 W7	26-3un Q2 W8	3-Jul Q2 W9	10-3ul Q2 W10	17-3al Q2 W11	24-Jul Q2 W12	31-Jul Q2 W13	7-Aug Q3 W1	14-Au Q3 W2
AHT Ramp W1	7.875	7 875	7.875	7.875	7.875	7.875	7.875	7.875	7.875	7.875	7.875	7.875	7.875	7.875
AHT Ramp W2	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	5.75	6.75	6.75
AHT Ramp W3	6.075	6.075	6.075	6.075	6.075	6 075	6.075	6.075	6.075	6.075	6.075	6.075	6.075	6.075
AHT Ramp W4	5.85	5.85	5.85	5.85	5.85	5.85	5.85	5.85	6.85	5.85	5.85	5.86	5.85	5.85
AHT Ramp W5	5.625	5.625	5.625	6.625	5.625	5.625	5.625	5.625	5.625	5.625	5.625	5.625	5.625	5.625
AHT Ramp W6	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4	5.4
AHT Ramp W7	5.175	5.175	5 175	5.175	5 175	5.175	5.175	5.175	5.175	5 175	5 175	5.175	5.175	5.175
AHT Ramp WB	5.0	5:0	5.0	6.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
AHT Ramp W9	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	6.0	5.0	5.0	5.0	5.0	5.0
AHT Ramp W10	4.725	4.725	4.725	4.725	4.725	4.725	4.725	4 725	4.725	4.725	4.725	4.725	4.725	4.725
AHT Ramp W11	4.5	4.6	4.6	4.6	4.6	4.6	4.6	4.5	4.5	4.5	4.5	4.5	4.5	4.5
AHT Ramp W12	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5
AHT Ramp W13	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5
AHT Ramp W14	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5	4.5
		19												

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.



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.

e Data														
		Emiron		Care_CA		10			009 11:17					
		Organiz	ational Unit:	Email_H	yderabad		ast Accept	od: 5/8/2	009 03:55	PH				
	Site Date:			Datei	End Date:					-				
1	Floor Head	icount	- 5rt	5/2009	8/14/200	00 2	Retries	en 🔀	Cantel	No.	date			
								10.07						
	15-Hay	22-11/17	29-Hay	5-Jun	12-340	19-Jun	26-Jun	3-34	10-Jul	17-Jul	24-34	31-Jul	7-Aug	03 14-A
Week of:	Q2 W2	Q2 W3	Q2 W4	QZ WS	Q2 W6	Q2 W7	05 MB	da ma	Q2 W10	02 W11	Q2 W12	CLM SD	Q3 WI	Q3 W
Floor Headcount	34	r i	1 8	i la	10 8	6 9	6	1	1	1	1 8	1	6 1	F.
Productive Headcount	1	1	0 1	1 3) (1 1	8	1	1	6	i (1 6	r -
Inactive Attrition (Termination)	0	0	0	0	0	0	0	0	a	0	0	0	0	0
Active Attribun (Promotion)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Returning from LOA	0	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	0
New Hires Start Training	0	0	0	0	0	0	0	0	a	0	0	Ø	0	0
New Hres in Training		1 1			0 0	2 0	0	8 8	N		0 0		1 1	È.
New Mires Attrition	0	0	0	0	0	0	0	0	0	0	0	0	0	0
New Hires Entering TQ (Actual)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
New Hires Entering TQ (Projected	0 0	1	6		1 0	1 0	0	6	0. 14	0.1 0	0 0		1	i
Conversions Entering Production	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Conversions Training	0	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	0
Transfers Out	0	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	0
Departing to Project	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total HeadCount	1 Die	1	1 8	1	1 8		6				8		1 1	E C
OSP Calls Handled Capacity	-									<u> </u>			<u> </u>	-
OSP Calls Offered Allocated	-	-		-	-		-		-					1
	,		,					,				<i>N</i>		
Overtime Hours/Agent	0	0	0	0	0	0	0	0	0	0	0	10	6	0
VTO Hours/Agent	0	10	0	0	0	0	0	0	0	0	0	10	6	0

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.

	Environment:	Care_C/	AN ·		Last Modified	: 5/8/2009 03:54	PM		
	Organizational Unit:	Email_F	lyderabad	٠	Last Accepte	d: (Not Accept	ed)		
	Ste Dete: Training Parameters	-	Retrieve		Download	Ede 💟 .	Accept		
Rame		D	efault Value			Begin Data	End Date V	ilue	Action
New Hire Training Weeks					10	SUARS			
New Hire Training Attrition					.05	1/1/1980	12/31/2020	3	
new me manny scoroon					-05	1/1/1900	12/31/2020		
New Hire Remedial Training					0				
Transition Attrition Projection					.01				
Tenured Attrition Projection					.,01				
Tenured Promotion Projection					.0019				
						1/1/1980	12/31/2020	.0025	

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.

	Environment: Organizational Units	Care_CAN :	Last Modified: 5/8/200 Last Accepted: (No	99 03:54 PM at Accepted)		
	Site Data: Transition Productivity	Retrieve 🚰	Download 🛛 🚰 Edit	Accept		
Name		Default Vahie	Lower Range	Upper Range	Value	Actio
Transition Productivity			1	0.00		
				1	2 .75	
				4 999	3 .90	
7.1			0.5	4 999	1 9	
Tst			0-3	1	5 1	
					<i>s</i> 1	
act File to Uplcad						

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.

Site Allocation Table	Description	User	Environment	Creat	ed	Hodd	ed	Actio
Test cd	test cci	(Unknown)	Care_CAN	2/26/2009	08:51 AM	4/26/2009	08:11 PM	7 3
DOCKPS defualt	DOCKPS defualt	Admin, Admin	DOCXPS	3/4/2009	03:24 PM	4/28/2009	11:21 PM	7 2
Care Test	Care Test Allocation Table	Admin, Admin	Care_CAN	3/5/2009	11:47 AM	4/2/2009	10:52 PM	7 4
Test CTS	Test CTS	Admin, Admin	CT5	3/12/2009	02:02 PM	4/21/2009	02:06 PM	17 4
CTS Default	CTS Default Test	Admin, Admin	CTS	3/18/2009	05:23 PM	4/29/2009	05:11 PM	7 1
John test	john test	Admin, Admin	CTS	4/3/2009	04:38 PM	4/3/2009	06:18 PM	7 :
John careCAN	John careCAN	Admin, Admin	Care_CAN	4/3/2009	06:19 PM	4/6/2009	03:11 PM	17 1
CT5 Nonhierarchical No Multiskilleff	CTS without applying blended hierarchy	Admin, Admin	CTS	4/10/2009	02:44 PM	4/13/2009	11:38 AM	17 1
Care US Default	Care US Default	Admin, Admin	Care_US	4/28/2009	04:15 AM	4/28/2009	04:19 AM	7 4

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.

Add New Site Allo	cation Table		
Name:	Description:	Environment:	Add Table

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.

Save Table	Can	iei.							
		User		Admin, Adm	nin.	Date Created:	3/4/2009	03:24 PM	
		Aloca	tion Table:	DOCXPS of	Señualt	Date Modified:	4/28/2009	11:21 PM	
		Descri	ption:	DOCXPS of	defualt	Prioritize:	R		
		Enviro	nment:	DOCXPS		Report Required Tenured:	V		
		Apply	Blending Ha	eranchy: 🗖		W. 399 (1996) (1996) (1996)			
				iciency:					
			Contraction of the second						
DOC - Voka	XPS - C	hat	XPS -	Email XPS -	Voice YTT - Voice				
					Maximum Overtime	Haximum Volunteer	Time Off		
Organizational Unit	Priority	Vendor		Email XPS -			Time Off	Contact Cost (\$/min	Contact Penalty (5/mi
Organizational Unit DOC-Voice_Stel-Mumbal	Priority 1	Vendor 17			Maximum Overtime	Haximum Volunteer	Tume Off	Contact Cost (\$/min	0
Organizational Unit DOC-Voice_Stel-Mumbal DOC-Voice_Pasay	Priority 1 2	Vendor P P		TE Placehourn FTE	Maximum Overtime	Haximum Volunteer	Tume Diff	Contact Cost (\$/min 0 0	
Organizational Unit DOC-Voice_Stel-Mumbal DOC-Voice_Pasay	Priority 1 2	Vendor 17			Maximum Overtime	Haximum Volunteer	Time Off	Contact Cost (\$/min 0 0	0
Organizational Unit DOC-Voice_Sitel-Mumbal DOC-Voice_Pasay DOC-CO LO_Bangalore	Priority 1 2 3	Vendor P P		TE Placehourn FTE	Maximum Overtime	Haximum Volunteer	Time Off	Contact Cost (\$/min 0 0 0	0
Organizational Unit DOC-Voice_Stel-Mumbal DOC-Voice_Pasay DOC-CO LO_Bangalore DOC-CO LO_Chandigarh	Priority 1 2 3 4	Vendor P P		TE Placement FTE	Maximum Overtime	Haximum Volunteer	Time Off	Contact Cost (\$/min 0 0 0 0 0	0
	Priority 1 2 3 4 5	Vendor P P	Flatinuan F	TE Placinum FTE 0 1000 1000	Plaximum Overtime (hri/FTE) 0 0 0 0	Haximum Volunteer	Time DH	Contact Cost (\$/min 0 0 0 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.

Category: AHT Ramp	. 7							
		AHT Ram	p					
Rame	Caption	Default Value	Aggregate	Litter Break	Read Only	Hidden	196	Action
AHT_W1	AHT Ramp W1	ISNULL(AHT_WI(DATE - 7],0)	None					1
AHT_W2	AHT Ramp W2	ISNULL(AHT_W2[DATE - 7],0)	None					34
AHT_W3	AHT Ramp W3	ISNULL(AHT_W3[DATE - 7],0)	None					2
AHT_W4	AHT Ramp W4	ISNULL(AHT_W4[DATE - 7],0)	None					17
AHT_WS	AHT Ramp WS	ISNULL(AHT_W5[DATE - 7],0)	None					37
AHT_W6	AHT Ramp W6	ISNULL(AHT_W6[DATE - 7],0)	None					R
AHT_W7	AHT Ramp W/7	ISNULL(AHT_W7[DATE - 7],0)	None					12
NHT_W8	AHT Ramp W8	ISNULL(AHT_W8[DATE - 7],0)	None					DP.
AHT_W9	AHT Ramp W9	ISNULL(AHT_W9[DATE - 7],0)	None					Cr'
AHT_W10	AHT Ramp W10	ISNULL(AHT_W10[DATE - 7],0)	None					17
AHT_WII	AHT Ramp W11	ISNULL(AHT_W11[DATE - 7],0)	None					18
AHT_W12	AHT Ramp W12	ISNULL(AHT_W12[DATE - 7],0)	None					2
HT_W13	AHT Ramp W13	ISNULL(AHT_W13[DATE - 7],0)	None					3
AHT_W14	AHT Ramp W14	ISNULL(AHT_W14[DATE - 7],0)	None					12

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.

Add Site Data Ite	m			
Name:	Caption:	Default Value:	Aggregate: None	Add N

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.

X Delete	Fiter; Care_CAN	(All Tags)	(A)I)	filter.	10 A	Refresh 🔁	New Capacit	y Plan	ning I	Run
Environment	Description	User.	Configuration		Last Run	Completed	Status		Actio	m:
Care_CAN	Retest 3	Care, Care	Forecast: Profile: Site Allocation:	Projection 02_2009 New Advanced Configuration test cd	05/08/2009 06:85 PM	05/08/2009 06:22 PM	Official	173	S	•
Care_CAN	CareCAN zero aban	Admin, Admin	Forecast: Profile: Site Allocation:	John 6 forecast Care_Auto_occ_90% John careCAN	04/16/2009 04:19 PM	04/16/2009 04:27 PM	Published	111	5	*
Care_CAN	CareCAN occ test	Admin, Admin	Forecast: Profile: Site Allocation:	Upload #2 Care Care Test Alocation Table	04/03/2009 02:59 PM	04/03/2009 03:23 PM	Official		S	*
Care_CAN	Retest	Admin, Admin	Forecast: Profile: Site Allocation:	Upload #2 Care test.cd	03/30/2009 05:11 PM	03/30/2009 05:16 PM	Official	Ē	S	•

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.

Capacity Analysis					_			
🕶 Back 🔁 Tag	Environment: Care_ Last Run Date: 05/01 Service Profile: Adva	1/2009 hced Run	Description: Forecast: Site Allocation	Table: test co	on 0	2_2009 New		
Contact Group Barne	Cap	ucity Ana				ata	Detailed Stat	tistics
EmailCAN		11 7		63	3	10	1 3	
Main French_CAN		1 7			2	10	5 🗆	
MRG_CAN		8		103	3	ala .	5 🗉	2
Post-Delivery_CAN		1 7				11	1 2	
Pre-Delivery_CAN		8 7		13	2	53	5 11	
					3		3	
		Cap	acity Analysis Summ	ary				
	Environment: Forecait: Service Profile: Site Alacotion Table: Requirements Analysis Period: Bucket Stee: Schedule Inefficiency:			Care_CAN Projection 0 Advanced R test cd 03/07/2009 1 Day Advanced R	2_2(un - 01/			
		Down	oad Requirements Sur	THATY				

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.

Capacity Report													
Buck	Environment Last Run Da	9. 1077		Descriptio Forecast:		3 Ion 02_200	9 New						
	Salarit Reports			Select Contact	(Crowk)								
	Allocations-Projecte	ed_SL		Post-Deliv	ery_CAN 3		baolineot						
	100000000000000000000000000000000000000	0700		100000000	0.020040								
	(B)												H
							FY10						
					D						02		
Work Indeg:	13-Har Q1 W6	29-Mar Q1 W7	27-Mar Q1 W8	3-Apr Q1 WP	10-Apr 01 W10	17-Apr Q1 W11	24-Apr Q1 W13	1-Hay QI W13	8-Hay Q2 W1	15-May 02.W2	22-May Q2 W3	25-Hay 02 W4	5-3un 92 W5
Post Delivery_CAll Post_Hyderabat (Cals Offered)	2,803	2,799	2,795	2,750	2.612	2,549	2.587	2,604	2,075	2,030	1,865	1.680	2,04
Post Hyderabad (Calls Handled)	2.714	2,711	2,706	2.659	2.536	2,481	2.516	2.525	2.041	1.999	1.843	1.858	2.91
Total (Calls Offered) Total (Calls Handled)	2,803 2,714	2,799	2,795	2,750	2,612	2,549 2,481	2,587	2,604	2,075	2,030	1,865	1,880	2,04
Total (Abandonment %)	3.16%	3.14%	3.17%	3.30%	2.92%	2.66%	2.74%	3.03%	1.65%	1.55%	1.16%	1.18%	1.659
Total (Planned Blockage %)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.007
Total (Service Level %)	87.91%	88.02%	87.88%	87.40%	88.85%	89.90%	89.57%	88.46%	93.84%	94.25%	95.71%		93.859

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													
Back	Environmen Last Run Da	2 2022		Descriptic Forecast:	wnc: Rotest Project	3 bn 02_200	9 New						
	Select Report:			Select Context	Oresp:								
	LOB Site Data		•	Post-Delk	ery_CAN		Download						
	(8)												1.0
							FY3H						
				9	10						02		
Week Indiag Post-Delivery CAN	13-Mar Q1 W6	20-Mar Q1 W7	37-Mar Q1.W8	3-Apr Qt W9	10-Aar Q1 W10	17.Apr Q1 W11	24-Apr Q1 W12	1-Hay QI W13	Q2 W1	15-Hay Q2 W2	22-Mey Q2 W3	29-Hay Q2 W4	\$-3m Q2 W5
Post_Hyderabad (Calls Handled)	2,714	2,711	2,706	2,659	2,536	2,481	2,516	2,525	2,041	1,999	1,843	1,858	2,01
Post_Hyderabad (Floor Head Count)	11	11	tì	11	11	11	11	11	11	11	it	11	1
Post_Hyderatiail (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
Post_Hyderabad (Calls per Rep per Week)	243	243	243	240	229	225	228	230	186	183	169	171	- 16
Total (Calls Offered) Total (Calls Handled) Total (Nor Head Count) Total (Planned Blockage %) Total (Abandonment %) Total (Service Livel %) Total (Service Livel %) Total (CBW)	2,803 2,714 11 0,00% 3,16% 07,91% 4,2 243	2,799 2,711 11 0.00% 3.14% 88.02% 4.2 243	2,795 2,706 11 0.00% 3.17% 87.88% 4.2 243	2,750 2,659 11 0.00% 3.30% 87.40% 4.2 240	2,612 2,536 11 0.00% 2.92% 88.65% 4.2 229	2,549 2,481 11 0.00% 2.66% 89.90% 4.2 225	2,587 2,516 11 0.00% 2,74% 89,57% 4,2 229	2,604 2,525 11 0.00% 3.03% 88.46% 4.2 230	2,075 2,041 11 0.00% 1.65% 93.84% 4.2 186	2,030 1,999 11 0.00% 1.55% 94.25% 4.2 193	1,805 1,843 11 0.00% 1.16% 95.71% 4.2 169	1,890 1,858 11 0.00% 1.18% 95.65% 4.2 171	2,04 2,01 1 0.00 ⁴ 1.65 ⁴ 93.05 ⁴ 4.
	(12)												

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.

apacity Report													
Back	Environment Last Run Dat	1.100.000		Nescription Torecast:	k: Retest 3 Projectio) an 02_2009	New						
	LOB ACD Headcou	nt		eet Corted Past-Delive	Internet		-						
		Presidential and a second s											- 23
							FY38						
	1.2000			9							92		
Week fading:	13-Plar Q1 W5	30-Pfay Q3-W7	27-Hite Q1 908	3-Apr QLW9	10-Apr Q1 W10	17-Apr Q1 W11	24-Apr Q1 W12	1-May DI W13	8-Hay g2 W2	15-May 03 W7	22-Hay 02/W3	25-Hay 02.W4	5-Ju 02 W
Post Delivery_CAN	1400-	and the second		1.11	1.00	1	2000		1.14		2.1	1000	2000
Post_Hyderabad (Floor Head Count)	11	11		11	11	11	11	11	11	11	11	11	
	11		11	11	11	11	11	11 10	11	11	11	11	
Total (Floor Head Count)						10	1.1	10	11			15	
Total (Floor Head Count) Total (Required Floor Head Count)	11	11	11	11		10	11	- 10	,				

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.

apacity Report														
Back		Environment: Lest Run Date	Care_CA		escription orecast:	i: Reteit 3 Projectio	m 02_2009	New						
	LOB_	port: AHT_by_Queue			lect Contact (Poist-Delive	insup: ry_CAN 💌	1 0	ownload	1					
		۲												8
								FY10						
		Sector 1			9				1000			65		
Week Indag:		Q1 W6	20-Har Qt W7	27-Plar Q1 W8	7-Apr Q1 W9	19-Apr Q1 W10	17-Apr Q1 W13	24-Apr Q1 W12	1-Nav Q1 W13	4-Play Q2 W1	15-Hay Q2 W2	22-Hay 02-W3	Q2 W4	5-3un Q2 W5
Post_Hyderabad (Average Handing Time)		4.2	4.2	4.3	4.2	4.2	4.2	4.2	4.3	4.2	4.2	4.2	4.2	4.
Total (Weighted ART)		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

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.

Capacity Report													
Back	Environment Last Run Da	1 07 ST		Descriptic Forecast:	an: Reteat Project	3 ion 02_200	9 New						
	Seact Report: [LOB_Capacity_Plan	1		Select Contect Point-Delix	- C	-	Download	ni.					
	۲						a trate						10
	1.241.0						64.918				10.00		
Management of the second s	23-Har	20-Har	27-Her	3-Apr	10-Jar	17-Apr	24-Apr	1-Hay	B-Hey	25-May	Q2 22-May	25-Hey	5-3m
Week Ending	Q1.W6	Q1 W7	Q1 WR	Q1 W9	Q1 W20	Q1 W11	Q1 W12	Q1 W13	65 M3	Q2 W2	CW 50	02 W4	Q2 W5
Post-Delivery_CAN Post_Hyderabad (Cals Offwred)	2,603	2,799	2,795	2,750	2,612	2,549	2,587	2,604	2,075	2,030	1,865	1,800	2,04
Total (Calls Handled)	2,714	2,711	2,706	2,659	2,536	2,481	2,516	2,525	2,041	1,999	1,843	1,858	2,01
Total (Calls 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	2,04
Total (Planned Blockage %)	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
Total (Abandonment %) Total (Service Level %)	3.16%	3.14% 88.02%	3.17% 87.88%	3.30% 87.40%	2.92% 88.85%	2.66%	2.74%	3.03% 88.46%	1.65% 93.84%	1.55% 94.25%	1.16% 95.71%	1.18%	93.85

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.

apacity Report													
Back	Environment: Last Run Dab	1.0.20		lescription orecast:	n Retest 3 Projectio	n 92_2009	New						
	Select Report: LOB_CRV/_by_Quees	*		ect Contect (Post-Delive	ny_CAN ∦	2 6	senioad	1					8
				9			FY10				1124		
											d3		
Week fadag	13-Flar Q1 W6	26-Har Q1 W7	27-Mar 01 W8	3-Apr Q1 99	18-Apr Q1 W18	17-Apr 01 W11	24-Apr Q1 W12	3-Play 01.W15	8-Hay Q2 W1	15-Hey 02.W2	23-Hay (02 W3	29-11ay 02 W4	5-Jun Q2 W5
Week Ending Post-Delivery CAB Post-Hyderabal (CRW)	13-Plan			3-Apr	10-Apr	17-Apr Q1 W11 225	24-Apr Q1 W12 228	1-Hay Q1 W13 230	8-Hay Q2 W1 196	15-Hey Q2 W2 183	22-Hay 02 W3	05 M4	5-3un Q2 W5 16

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.

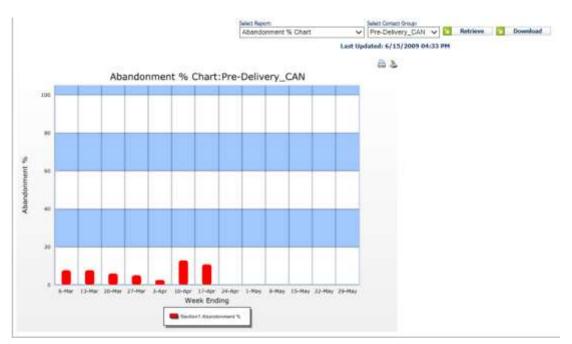


Figure 4.9 – Abandonment % Chart

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.

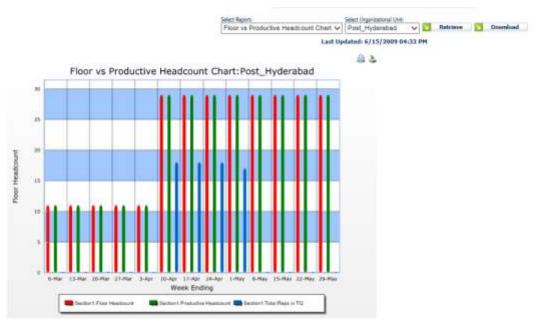


Figure 4.10 – Floor vs. Productive Headcount Chart

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.

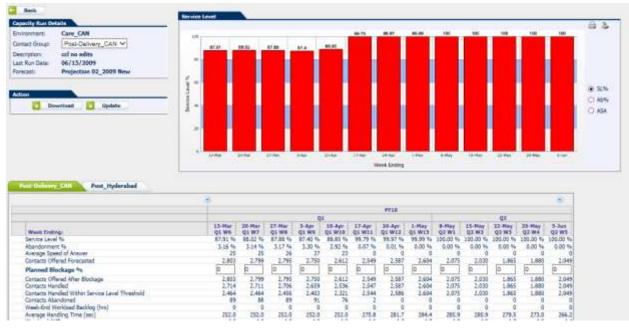


Figure 4.12 – Capacity Analysis Editing

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.

	(8)												81
							FYX0						
				9							d's		
Werk Ending	E3-Mar Q1 W6	20-Mar Q1 W7	27-Hur Q1 W8	3-Apr. Q1.W9	10-Apr Q1 W10	17-Apr Q1 W11	24-Apr Q1 W12	1-May Q1-W13	4414 a	15-May Q2 W2	22-May 02/03	29-May 02-W4	5-34H Q2W5
Service Level %	87.91 %	98.02 %	87.88 %	87,40 %	85.83 %	89.90 %	89.57 %	88.46 %	93.84 %	94.25 %	95.71.%	95.65 %	97-85 1
Abandonment %	3.16 %	3.14 %	3.17 %	3.30 %	2.92 %	2.66 %	2.74 %	3.03 %	1.65 %	1.55 %	2.16 %	1.18 %	1.65 5
Average Speed of Answer	25	25	26	27	23	21	22	24	12	11	8	8	1
Calls Offered Forecasted	2,803	2,799	2,795	2,750	2,012	2.549	2.587	2,604	2,875	2,030	1,865	1.880	2,049
Planned Blockage %	0	0	a	0	2,012	0	0	2,604	0	0	1,865	0	0
Calls Offered After Blockage	2,803	2,799	2,795	2,750	2.612	2,549	2,582	2,604	2,075	2,030	1,865	1.880	2,040
Cals Handled	2,714	2,711	2,706	2,659	2,612 2,536	2,481	2,516	2,525	2.041	1.999	1.843	1,858	2,015
Calls Handled Within Service Level Threshold	2,464	2,464	2,456	2,493	2,321	2,201	2.317	2,304	1.947	1.913	1,785	1.798	1.92
Cals Abandoned	89	55	89	91	76	68	71	79	34	31	22	22	34
Weighted AHT	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.3
Total Current Finor Head Count	11	11	11	11	11	11	11	11	11	11	11	11	- 11
Required Floor Head Count	11	11	11	11	11	10	11	10	9	9	9	9	
Total New Hires Start Training	0	0	0	0	D	0	0	0	0	0	0	0	. (
Planned Attrition	0	0	0	0	0	0	0	0	0	0	0	0	
Total Overtane (Hours)	0	Ū.	0	0	0	0	0	0	a.	g	0	0	
Total VTD (Hours)	0	ů.	0	0	0	0	0	0	0	0	0	0	
Total New Hires in Training	0	0	0	0	0	0	0	0	0	0	0	0	
ORAN	243	243	243	240	229	225	228	230	196	1.83	.169	171	180
ORW_5L	220	221	221	217	210	207	210	210	178	175	164	165	177
Total Corporate Site Calls Handled	2,714	2,711	2,706	2,659	2,536	2,481	2.510	2,525	2.041	1,999	1,643	1,858	2,015
Total DSP Cals Handled	0	0	0	0 B	0	0	0	0	0	0	0	0	
OSP Cale Handled (%)	0.00 %	0.00 %	0.00 %	0.00.%	0.00 %	0.00 %	11.00 %	8.00 %	0.00 %	0.00 %	0.02.%	0.03 %	0.00 %
Total Corporate Site Cals Offered	2,803	2,799	2,795	2,750	2,612	2,549	2.587	2,604	2,075	2,030	1,865	1,893	2,049
Total OSP Calls Offered	0	0	0	0	0	0	0	0	0	Ű.	0	0	
Required Capacity	2,803	2,799	2,795	2,750	2,612	2,549	2,587	2,604	2,075	2,030	1,865	1,880	2,04
100000000000	(a)				-					-			10

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.

	(8)												H
				0			FY10				02		
	13-Mar	28-Mar	27-Mar	3-Apr	3B-Apr	17-Apr	34-Apr	3-May	8-91eV	15-Play	12-Hay	29-Hay	5-340
Week Ending	0W 19	Q1 W7	Q2 W8	QE W9	01W10	01 W11	Q5 W12	US WEJ	02 W1	02 W 2	02 W3	02.494	02.W5
Hoor Head Count	11	11	11	11	11	11	11	11	11	11	11	11	1
Productive Head Count	7	7	7	7	1	7	7	7	7	7	- 7	7	
Inactive Attribut	1	0	0.	0	0	.0	0	0	0	0	a.	0.	
Active Altrition	0.63	0,63	0.03	E0.0	0.03	0.03	E0.0	0.03	0.03	0.03	0.03	0.03	8.0
Beturing from LOA	0	0	0	0	0			.0	0	0	G C	g.	
Departing to LOA		0	0	0	0					0	0	0	-
Planned Attrition	10	10	10	0	0	a	10	- P	-10	10	10.	0	0
New Hires Start Training	0	a	0	0	0	0	10	0	0	0	0	Ó	0
New Hees in Training			0	Ú.,	0		. 0	0	0		a		
New Hires Attribus	-0.1	.0.1	0.1	0.1	0.1	0.1	0.1	1.0	0.1	1.0	0.1	.0.1	0.
New Hras Estaing TQ (Projectori)	0	0		ų.	0	. 0.	0	0	0	a		0	
Conversions Entering Production	0	0	0	0	0	0	0	0	0	0	0	0	
Conversions Training (Leaving) Transfers bi	0	0	0	0	0	0			0	0		0	
Transfers Out	0	- 0		0	0	- 0		0	0	.0			
Returning from Project	0	0	0	0.	0				0		0		
Departing to Project	0	0	0	0	0	0	0	0	0	0	0	0	
Overtime/Agent (Hours/Tenured)	0.00	1 00	0 00	0.00	5.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
overcene) (dent (nound terminal)	1.0.1	and the second se		and statements	1 Annual I	 Schools 	and the second second	-	- Annotation -	- Contraction of the local division of the l	and the second se	and the local design of th	and the second
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
Cals 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	2,04
Calls Handled	2,714	2,711	2,706	2,659	2,536	2,4B1	2,516	2,525	2,041	1,999	1,843	1,858	2,01
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	1,92
Calls per Rep. per Week	243	243	243	240	229	225	228	230	195	183	169	171	18
Calls Within Service Level per Rep per Week	220	221	221	217	210	207	210	216	178	175	164	165	17
Average Handling Time	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.7	4.2	4.2	4.2	
Support Staff	4.2	4.2	4.2	1.2	4.2	9.2	9.2	9.2	*.2	4.2	0.2		
Support Staff Cost	0	0	0	0	đ	0			0	a a			
Tenured Agents Cost	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	
and a second control of the second second	(A)												10

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.

	8												0
	1						FYER						
				q	Lances						Q2		
Week Ending	E3-Plan Q1 We	20-8tar 03 W7	27-Har Qt We	3-Apr 01 109	18-Apr Ot W16	17-Aar 01 W11	24-Apr 01 W12	3-May Q1 W13	B-Play Q2WS	15-Hay 02 82	22-Play 02.W1	25-May 02 Wit	5-Jun ()2 w
Devictor: Were-Kokata (Cala Handed Cap)	41 410	ur ar	0	41.002	0	Qu wat	O UL WILL	0	de as	de me	42.44.5	the same	dis er
DPPrint, Hydershad (Cals Handled)	13,300	13,483	11,408	12,465	12,825	16,442	8.008	8.135	8,195	7,822	7,954	7,299	8.3
DT VILS Bangalore (Cals Handled)	324	318	317	318	306	290	327	313	9,192	256	240	203	
DT B.5 Bangalore (Calli Handled)	630	619	616	602	504	564	636	689	488	951	910	203	-
DeskPort_Debi (Cals Handled)	18,950	19,207	22,149	23,965	13,953	23,413	24,303	27,510	25,388	26.558	24,095	21,168	26.
DeskPort, El Salvador (Calis Handled)		0	0	8	0	D	0	0	0	0	0		2.00
Desktop Suth-Humbai (Cale Handled Cap)	17,850	17,850	17,850	16,200	16,100	16,100	16,073	15,777	14,249	14,129	13,877	12,815	12
DeskPort_Chandigarh (Cals Handled)	20,165	20.397	21,107	18,509	21,091	20,854	21,923	19,008	14,664	14,576	14,070	12,284	17.
Desktop Suth-Chennai (Cals Handled Cap)	18,700	18,700	18,700	16.850	15.850	16,850	16.822	16,512	14,937	14,811	14,547	13,434	32
DeskPort_Bangalore (Calls Handled)	12,597	12,860	12,770	13,263	13,378	14,394	15,619	15,692	8,900	7,205	8,297	8,971	12
Desktop_Woro-Pune (Calls Handled Cap)	0.000	0	0	0	0	0	0	0	- 0	0	0		
Desktop_Woro-Delhi (Cals Handled Cap)	0	0	D	. 0	0	0	0	0	- Ø	0	n		
Desktop_Wpro-Humbai (Calls Handled Cap)		0	0		0	0	0	0		0	0		
DeskELSMLS_RR (Cals Harded)	1,328	1,304	1,299	1,268	1,253	1,189	1,341	1,283	1,047	1,066	999	845	
Total Handled by Ste	79,230	69,665	09,282	66,227	67,100	68,047	64,084	64,490	53,828	54,281	52,439	47,599	56,
Desktop_Wipro-Kalkata (Calls Offered Allocation)	00.00	0	0	0	0	Ū.	4	0	.0	Ū	0	Ū.	
DPPrint_Hyderabad (Calls Offered)	10,114	17,547	17,974	15,195	13,826	16,430	8,008	8,155	8,195	7,822	7,954	7,299	
DT HLS_Bangalore (Calls Offered)	379	365	352	346	336	289	328	313	251	256	240	203	
DT ELS_Bangalore (Cals Offered)	737	709	693 24,479	673	654	23,377	636	609	488	951 36,558	918	791	36.
DeskPort_Deltr (Calls Offered) DeskPort: El Salvador (Calls Offered)	22,450	22,073	49,979	25,597	36,113	43,317	24,303	27,516	25,388	10.308	34,095	21,168	30,
Desktop Suth-Humbel (Calls Offered Allocation)	19,856	19.272	18,653	16,832	16.406	16,166	16,073	15,777	14,249	14,129	13,877	12,815	12
DeskTop_Stormaneer(cals Offered)	23,889	23,441	23,327	20,629	22,903	20,822	21,923	19,000	14,664	14,576	14,070	12,284	17.
Desktop: Suth-Chermal (Cals Offered Allocation)	20,902	20,190	19,542	17,617	17,170	16,919	16.827	16,512	14,937	14.811	14,542	13,434	32
DeskPort, Bangalore (Calls Offered)	14,923	14,779	14,113	14,782	14.585	14,372	15,619	15.692	8,900	7,205	8,297	8,971	12
Desktop_Word-Pune (Calls Offered Allocation)		0	D	0	0	0	0	0	0	0	0		
Desktop_Worp-Delh (Calls Offered Allocation)	0	0	D	d	0	0	0	0	0	0	D	0	
Desktop_W/pro-Mumbai (Cals Offered Allocation)		0	0	0	0	0		0		- 0	0	. 0	
DeskELSMLS_RR (Calls Offered)	1,552	1,493	2,440	1,417	1,377	1,185	1,341	1,283	1,047	1,066	999	846	
Total Offered by Sta	80,036	77,396	74,481	71,629	71,120	68,009	64,085	64,491	53,628	54,281	52,439	47,599	56,
Desktop_Wipro-Kolkata (% of Calls Handled Capacity)	100	100	100	100	100	300	100	100	100	100	100	100	10
Desktop_Suth-Mumbai (% of Calls Handled Capacity)	100	100	100	100	100	200	100	100	100	100	100	100	10
Desktop_Suth-Chennai (% of Calls Handled Capacity)	100	100	900	100	100	500	100	100	100	100	100	100	10
Desktop_Wipro-Pune (% of Calls Handled Capacity)	100	102	100	100	100	100	100	100	100	100	100	100	10
Desktop_Wipeo-Delhi {% of Calls Handled Capacity}	100	100	900	100	100	120	100	TDD	100	100	100	100	10
Desktop_Wipro-Humbai (% of Calls Handled Capacity)	100	100	100	100	100	100	100	100	100	100	100	100	10

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.

Forecast Result	s			
Cornet G	Rocket Size Rockstation Factors	0	Advanced 🛐 Downland 🛐 Advanced	6pdate
Start Date	Actual Call Volume	Finnsast Call Volume	Actual AST	Forecast AST
E3/6//20089-00:00	20.	0	1.768.10	0.00
03/07/2009 00:20	16	0	2,550.70	0.00
\$3/57/20HH 01.00	16	ja	2.534.87	0.00
03/47/2019 01:31	1	0	6,765.90	0.00
03/07/2019 02:00	1	0	1.82144	0.00
63/107/20109-02:30	9	la.	4,010.05	0.00
03/07/2000 03:00	1	a	1.451.00	0.00
0.5/07/24049-03/240	1	la la	1.142.20	lo ao

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.

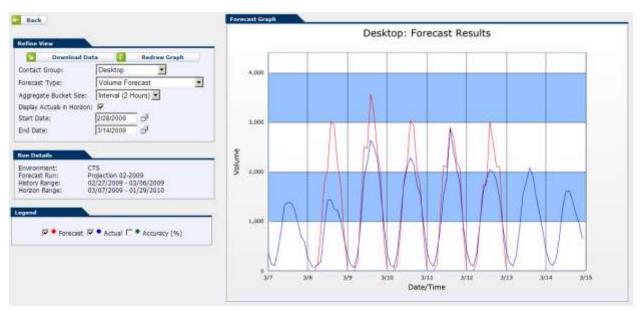


Figure 4.17 – Forecast Results Graph

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*.

iew Detailed Statistics					
Back		Environment: CT5 Last Run Date: \$/0/2009 Contact Group: 4x1	Description: Retest 3 Forecast: Projection 02-2009		
	History Start Date:	42/27/2009	Horizon Start Date:	03/07/2009	
	History End Date:	03/06/2009	Horizon End Date:	01/29/2010	
	Abandonment (%):	29.14	Average Wait Time (seconds):	171,34	
		Ve	Downlaad w Actual Forecast Error		

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.

New Capacity Planning R	un	
Environment:	Care_CAN 💌	
Forecast Results:	Projection 02_2009 New	
Description:		
Service Profile:	ac2 Budget Profile	•
Site Allocation Table:	Test ccl	
Schedule Inefficiency:	0 %	
		Advanced
Cancel 🔰	Submit New Capacity Planning	Run

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.

New Capacity Plannin	g Run		
	Environment: Care_CAN	1 -	
F	orecast Results: Projection	02_2009 New 🔻	
	Description:		
Site A	llocation Table: Test ccl	•	
			Hide Advanced Settings
	Contact Grou	up Configuration	
Contact Group	Service Profiles	·,,	Schedule Inefficiency Action
Email_CAN	ac2 Budget Profile	•	0.00 % Exclude
Main French_CAN	ac2 Budget Profile	•	0.00 % Exclude
MRG_CAN	ac2 Budget Profile	•	0.00 % Exclude
Post-Delivery_CAN	ac2 Budget Profile	•	0.00 % Exclude
Pre-Delivery_CAN	ac2 Budget Profile	•	0.00 % Exclude
<u>(N</u>	one Available) 🔽 🔽	Include Contact G	roup
X Can	cel <mark>V</mark> Submi	t New Capacity Plan	ning Run

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.

Ma	nage Capacity Pla	nning Runs								
13	Delate 🔯 Campure	Hor: What-If Multiple COs	♥ (AJ Tags) ♥ (All)	× 🛃 Film			Refrech 🔯	New Capacity	Flammin	ig Rur
	Construmented	Description	User	Configuration	10 C	Lavit Run	Completed	Status	1	Action
	What it Multiple CGs	2/23/15 - 7/5/15 +25% CV	Admin, Admin	Folocald: Profile: Site Allocation	2/23/15 - 7/5/15 +25% CV 65/45 : What-If Default	02/11/2015 09:59 AM	02/11/2015 10:00 AM	Completed		8
2	what If Multiple OGs	2/23/15 - 7/1/15	Admin, Admin	Profilec	2/23/15 - 7/5/15 63/45	02/11/2015 09:56 AM	02/11/2015 09:59 AM		1	8

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.

Run Parameters		History Parameters	and the second se			
Environment:	Model Customer Service V	Contact Group	Prototype	Analysis Interval		Connect Type
Choose Forecast:	Create a New Run	100				Select Date Range
		C5	Even Distribution V	Most Recent Period V	4 Weeks ¥	Right Party Connect V
Description:		052	Billing_ABC V	Most Recent Period V	d Weeks 🗸	Right Party Connect 🛩
Uplead At: Start Date:	Weekly Level V	Outbound Test(AA)	Outbound Test(AA)	Most Recent Period V	4 Weeks 🗸	Right Party Connect V
End Date:	0301/2015	WOMR Phone	WOMR Phone V	Most Recent Period 🗸	4 Weeks 🗸	Right Party Connect 🛩
Special Event Profile:	None V	1				
Forecast Profile:	Default Profile V					
Publish Forecast:	D					
2	Download Template					
Upload Forecast Data						
Upload File:	Browne					
	Save Forecast Run					

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.

Ron Parameters	Current Blockage	Percentaget				
Environment: Care_CAN +	Work Inding	Emuil_CAII	Main French_CAN	HRG_CAN	Post-Delivery_CAN	Pre-Delivery_CAU
	05/15/2009	.0%	9%	0%	0%	05
Start Date: 05/09/2009	05/22/2009	0%	0%	0%	0%s	0
End Date: 07/24/2009	05/29/2009	046	0%	0%	0%	0
View 2 Download Template	06/05/2009	0%	0%	0%	0%	04
	06/12/2009	0%	0%	0%	0%6	0
Upload Blockage Percentages	06/19/2009	0%	0%	0%	0%	0
Jpload File: Browse	06/26/2009	0%	0%	0%	0%	0
Save Blockage Percentages	07/03/2009	0%	0%	0%	0%	0
	07/10/2009	0%	0%	0%	0%	0
	07/17/2009	0%	0%	0%	0%	0
	07/24/2009	0%	0%	0%	0%	0

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.

	Belect Reports			Select End	content Sele	ri Contact Gro	ispi .							
	Allocations-Proje	ected_St.		Care C	AN . P	ost-Delivery	CAN .	Dew	haoln					
			Last I	Ipdated: 5	/8/2009 0	6:27 PH								
		(8)												100
								TY18						
								È.						Q2
Week Ending		15-Play 02 W2	22-Hay 02 W3	23-May Q2 W4	5-Jun Q2WE	12-hm 02.00	19-3un ()2 W7	26-3un Q2 W8	3-Jul ()2.W9	10-34i Q2 W10	17-3ai Q2 W11	24-3ui 02.W12	31-3ui 02 W13	7-Aug 03 W
Post-Delivery_CAN														
Post_Hyderabad (Calls Offered)		2,030	1,865	1,880	2,049	2,211	2,200	2,092	1,891	2,278	2,290	2,421	2,504	2,6
Post_Hyderabad (Cals Handled)		1,999	1,843	1,658	2,015	2,165	2,155	2,052	1,866	2,226	2,237	2,357	2,504	2,5
Total (Calls Offered)		2,030	1,865	1,880	2,049	2,211	2,200	2,092	1,891	2,278	2,290	2,421	2,584	2,6
Total (Calls Handled)		1,999	1,843	1,859	2,015	2,166	2,155	2,052	1,866	2,226	2,237	2,357	2,504	2,5
Total (Abandonment %) Total (Planned Blockage %)		1.55%	1.16%	1.18%	0.00%	2.05%	2.05%	0.00%	0.00%	0.00%	0.00%	2.62%	3.09%	3.32
Total (Service Level %)		94.25%	95.71%	95.65%	93.85%	92.30%	92.29%	92.87%	95.14%	91.42%	91.26%	90.03%	88.22%	87.32
		il.			No.							-	1000	1.84

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.

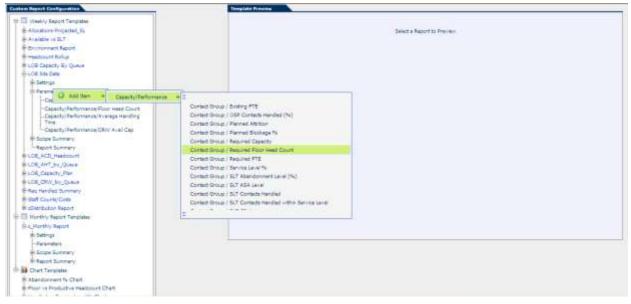


Figure 6.2 – Configure Capacity Reports

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 subsections.

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.

Export Forecast Breakdown	
	Select Environment: Care_CAN
	Start Date: 05/14/2009 🥩
	End Date: 05/13/2010 🥩
	Second Export Forecast

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	2 3
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:	FV10	Fiscal Year 2010	1/31/2009	1/30/2010	7 9
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	20
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.

Define New Fiscal year											
Enter Name: E	Enter Description:	Select Begin Date:	Select End Date:	9 🖌	Define Year						

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.