Cisco Unified Workforce Optimization

Workforce Management 8.0 Adminstration User Guide

Americas Headquarters
Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
http://www.cisco.com
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 527-0883

Revision History

Revision Date	Description
05-June-2007	First Customer Ship (FCS)

Revision History

Contents

Contents

1 Introduction

Overview

Workforce Management (WFM) is an industry-leading software solution for multi-site staff forecasting and scheduling.

Workforce Management allows call center managers to develop schedules for multiple sites, manage key performance indicators, and manage real-time adherence.

Workforce Management provides the following features:

- Manage scheduling of an unlimited number of sites from one or many locations.
- Manage scheduling for offices spread out in different time zones.
- Manage scheduling of alternative media sources seamlessly, including chat, email and faxes.

This document describes the Administration section of the Workforce Management graphical user interface (GUI). From the Administration section, you can:

- Review the standard roles and privileges within each role and assign the roles to users.
- Create and maintain views. A *view* is a collection of entities that defines the scope of privileges and level of accessibility a user has in Workforce Management. A view controls which contact service queues (CSQ), teams, agents, schedulers, and supervisors can apply their privileges.
- Maintain user identities and assign roles and views to users.
- Maintain default settings for date and language. Also maintain default configurations for dashboards and schedules.
- Review the status of processing tasks and cancel tasks as necessary.
- Maintain the list of exceptions that an agent can request through their eAgent services. A *generic exception* is a high level global type exception. These generic exceptions can be selected by agents in “My Page” (eAgent) module to indicate the type of time off they are requesting.

Intended audience

This document is written for administrators who use Workforce Management to manage and maintain a Workforce Management user environment.

About this guide

Conventions used

This document uses the following conventions:

Convention	Use
Bold	Highlights keys, buttons, and menu items you can select in the interface.
`Code`	Highlights file paths and code.
Italic	Highlights book titles, variables, and terms that are defined.
>	The right angle bracket indicates a menu choice. For example, "choose **File** > **Open**" means "click the **File** menu, and then click **Open.**"

Definitions

This document uses the following acronyms:

- WFM — Workforce Management
- CSQ — Contact service queue
- CSQ mapping — Contact service queue mapping

Getting Started

2

Overview

This chapter explains how to:

- Log into Workforce Management
- Navigate within the different menus and windows
- Set preferences
- Use buttons and icons in Workforce Management

Logging into Workforce Management

To log into Workforce Management:

1. Enter the following URL in your web browser:

   `http://`*`wfm`*`:8087/c3/`

   Where *wfm* is the IP address of the server on which Workforce Management application software is installed.

   NOTE: The website address is case-sensitive.

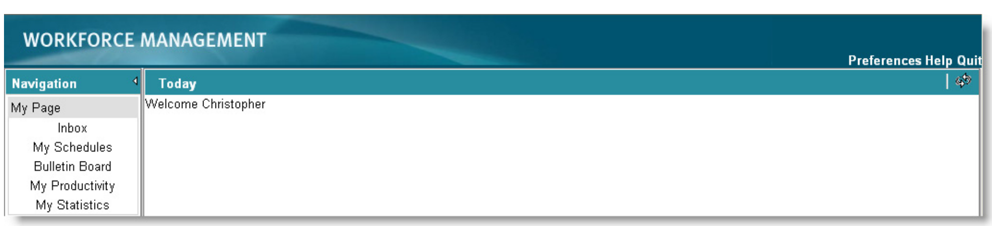
   The Workforce Management login window appears (Figure 1).

Figure 1. Workforce Management login window

2. Enter your username and password.
3. Click **GO** to log into Workforce Management.

   The Workforce Management window appears (Figure 2).

Figure 2. Workforce Management window



Navigating the menus

To navigate the main menu:

1. From the main menu, choose the section you want to access. The list of related tasks appears.
2. Click the task you want to use. The page associated with this task appears on the right side of the window.

To navigate a window list:

- You can sort columns containing alphanumeric values in any table in Workforce Management. To sort a table by a specific column, click the column heading.

  NOTE: Numbers are sorted from the first digit on the left hand side without accounting for its size, for example: 3 is before 299, 1 is before 0999, 34 is before 3104 and so on.

- If the list of items exceeds the length of the window, the following options appear at the bottom of the window (Figure 3).

Figure 3. Paging mode

— To go to the first page, click **First**. To go to the last page, click **Last**.

— To display all items on a single page, click **Show all**. To display items on multiple pages, click **Paging mode**.

— To go directly to a page, enter the page number in the Goto field and click **Goto**, or the page number.

The number of pages displayed between the left and right arrow icons determines the number of pages that you skip when you click an arrow key. As an example, consider a list that has 4 pages, as shown in Figure 3. If you click the left arrow, you move forward 4 pages in the list. If you click the double left arrow, you move forward 40 pages in the list. Clicking a double arrow moves you 10 times as many pages forward or backward as clicking a single arrow does.

- To move forward or backward in small increments (for example, 4 pages at a time), use the  or  buttons.
- To move quickly forward or backward in large increments (for example, 40 pages at a time {10 x 4}), use the  or  buttons.

General navigation information

Icon	Name	Description
	New	Create a new file (user, agent, CSQ mapping, etc.).
	Save	Save the newly created or modified files.
	Delete	Delete the selected files.
	Search	Search for files in a list.
	Print	Print the displayed data.
	Refresh	Refresh the displayed data (if applicable).
	Launch a request	Generate a processing request to the server.
	Define the context	Define the work context (CSQ, date, etc.).
	Next group	Move forward in small increments.
	Previous group	Move backward in small increments.
	Fast forward	Move quickly forward in large increments.
	Fast backward	Move quickly backward in large increments.
	New exception request	Create a new exception request. This icon only appears under My Page section.
	New schedule swap request	Create a new request to trade schedules. This icon only appears under My Page section.
	Preferences	Display the My preferences window.
	Help	Display help.
	About	Display the Workforce Management version.
	Quit	End your session.

Setting preferences

Accessing the Preferences feature

To access preferences:

1. Click **Preferences** (upper-right corner) to display the preferences window (Figure 4).

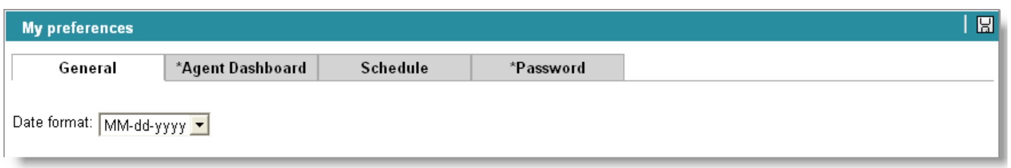
Selecting date format

To set the date format:

1. Click **Preferences.**

   The General tab on the My preferences window appears (Figure 4).

Figure 4. My preferences: General tab



2. Complete the field.

Field Name	Description
Date format	Select the date format you want to use in your future sessions. The available options are: • MM-dd-yyyy — Displays the date by month, day and year. • dd-MM-yyyy — Displays the date by day, month and year. • yyyy-MM-dd — Displays the date by year, month and day.

3. Click  to save your changes.

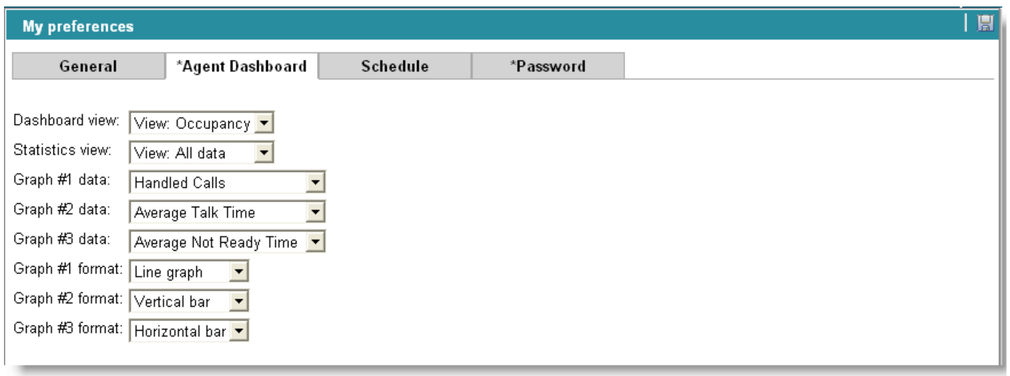
Selecting a dashboard

To select a dashboard

1. From the My preferences window, click the **Dashboard** tab.

   The Dashboard tab on the My preferences window appears (Figure 5).

Figure 5. My preferences: Dashboard tab



2. Complete the fields.

Field Name	Description
Dashboard view	Select the view you want to use for your dashboard display. The available options are: • Results x CSQ: Mapping • Results x CSQ: Agent • Results x CSQ: Calls • Results x Team • View: ASA • View: All data • View: Calls • View: Occupancy • View: Service Level

Field Name	Description
Statistics view	Select the view you want to use for your statistics display. The available options are: • Results x CSQ: Mapping • Results x CSQ: Agent • Results x CSQ: Calls • Results x Team • View: ASA • View: All data • View: Calls • View: Occupancy View: Service Level
Graph #1, #2 and #3 Data	Select the data to be graphed for each display in the dashboard. The available options are: • Forecasted Calls • Agents Forecasted • Forecasted service level • Real occupancy ratio • Forecasted average speed of answer • Real Call Handling time
Graph #1, #2 and #3 Format	Select a format for the graph. The available options are: • Vertical bar • Horizontal bar • Line graph

3. Click  to save your changes.

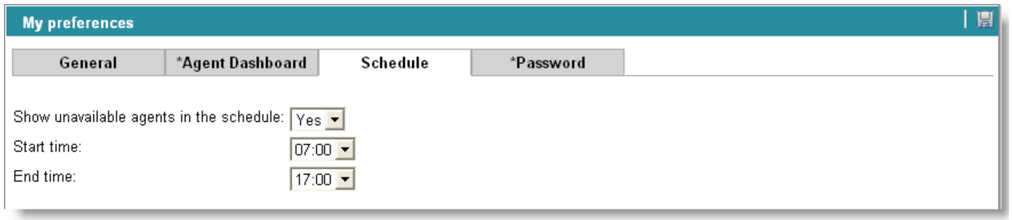
Selecting schedule display parameters

To select schedule display parameters:

1. From the My Preferences window, click the **Schedule** tab.

   The Schedule tab on the My preferences window appears (Figure 6).

Figure 6. My preferences: Schedule tab



2. Complete the fields.

Field Name	Description
Show unavailable agents in the schedule	From the scroll list, indicate if you want unavailable agents to appear in the schedules.
Start time	Select the start time when you want the schedule display to start. Specify a start time and end time that suits your needs. If you select a start time of 00:00 and an end time of 24:00, you might need to scroll from left to right to see the entire schedule.
End time	Select the end time when you want the schedule display to end.

3. Click  to save your changes.

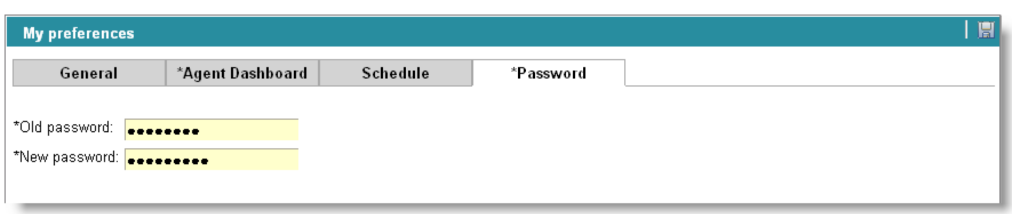
Changing your password

To change your password:

1. From the My Preferences window, click the **Password** tab.

   The Password tab on the My preferences window appears (Figure 7).

Figure 7. My preferences: Password tab



2. Complete the fields.

Field Name	Description
Old password	Enter your current password You might be asked to change your password when you first log into Workforce Management. You might also be asked to change your password on a regular basis.
New password	Enter your new password.

3. Click  to save your changes.

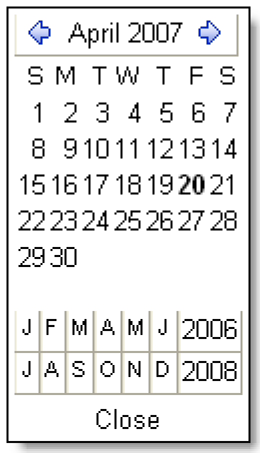
Selecting a date

There are many instances in Workforce Management where you need to enter a date. The following task explains how to enter a date in Workforce Management.

To select a date:

1. Enter the date directly in the format selected in your preferences (see "Selecting date format" on page 14).
2. Click the date field.
3. The Workforce Management calendar appears (Figure 8).

Figure 8. **Calendar**



4. To select the date, click the year, month and day.

Managing Administration

3

Overview

Use the Administration section in WFM to:

- Control access to functions through roles, views and privileges. See "Managing roles" on page 22 and "Managing views" on page 26 for more information.
- Create users in WFM or import users from Unified CCX. See Managing users (page 35) for more information.
- Specify the default configurations for the date format, dashboard and schedules. See Managing the default system configuration (page 40) for more information.
- Monitor the status of requests to generate distributions, forecasts and schedules. You can also delete incomplete requests. See Managing requests to the server (page 43) for more information.
- Monitor the status of requests to compile various historical measurements from the data that was extracted from the historical data tables in Unified CCX and delete incomplete requests. See Managing compilation requests (page 46) for more information.
- Create a system-wide list of exception types that appear as options an agent can select from their My Page (eAgent services) when they request time off. See Managing generic exceptions (page 48) for more information.

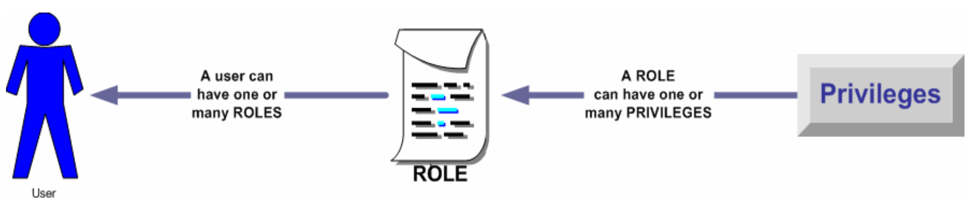
Managing roles

Workforce Management controls access to functions through roles, views and privileges.

- A *privilege* is the permission to perform a transaction. For example, the ability to accept schedule trades or delete skills.
- A *role* is collection of privileges.
- A *user* can have none, one or multiple roles. The user has the collective privileges across all roles assigned to the user.
- A *view* determines the level of accessibility a user has in Workforce Management. For example, you can assign a view that is associated with the site to one or more users. Or you can assign an area within a site to a user.

Figure 9 shows the relationship between a user, roles and privileges. Views are discussed in "Managing views" on page 26.

Figure 9. Relationship between user, roles and privileges



The following table lists the privileges and scope for default WFM roles.

Role	Privilege	Scope
Administrator	All permissions	Global

Role	Privilege	Scope
Scheduler	Maintain work shifts, breaks, and exceptions Map agents to work shifts Create forecasts Create schedules	Map agents, who are members of a team within the scheduler's views, to work shifts. Map agents, who are members of a team within the scheduler's view, to contact service queues within the scheduler's views Configure work shifts and conditions Maintain forecasts and schedules for contact service queues within the scheduler's views.
Supervisor	Use eSueprvisor services	Manage the team or teams assigned to the supervisor and the agents within the team or teams.
Agent	Use eAgent services	Manage the agent's own information.

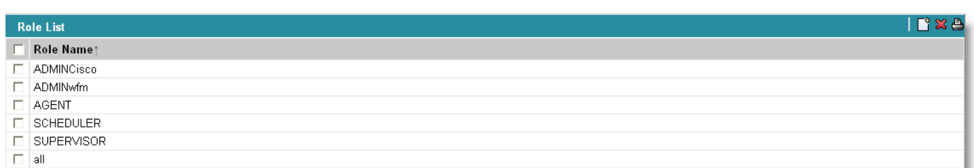
Displaying a role

To display a role:

1. From the main menu, choose Administration > Roles.

   The Role List window appears (Figure 10).

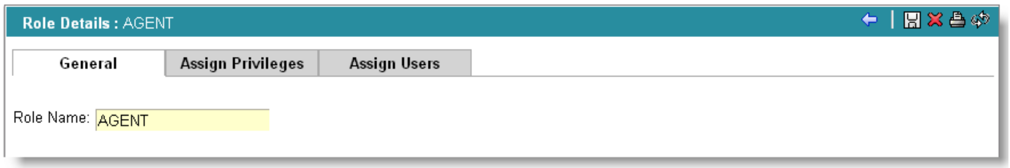
Figure 10. Role List



2. Click a role.

   The General Tab on the Roles Details window appears (Figure 11).

Figure 11. Roles Details: General tab



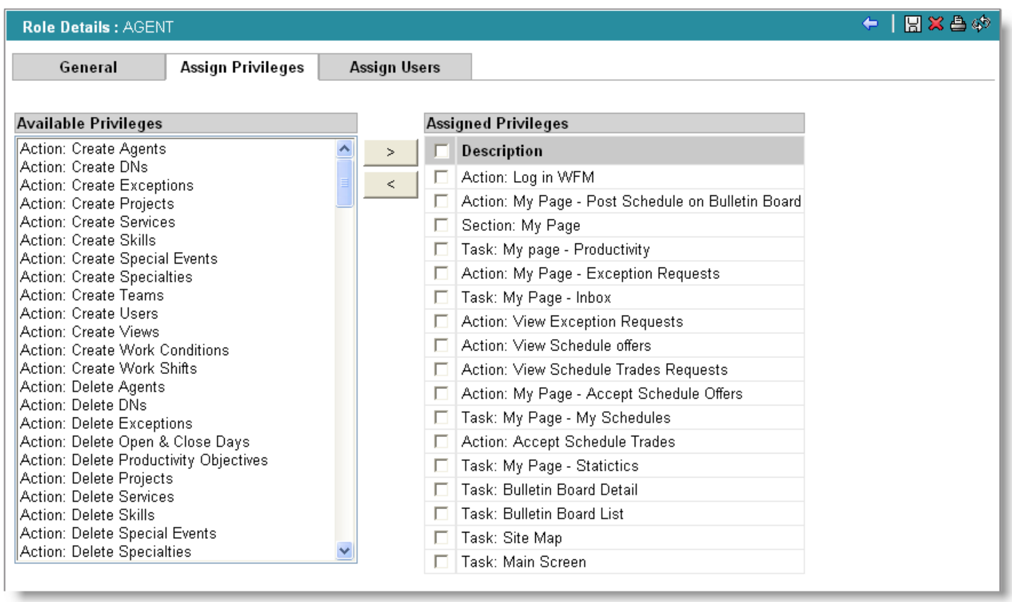
Displaying a role's privileges

To display privileges:

1. From the Roles Details window, click the **Assign Privileges** tab.

   The Assign Privileges tab on the Roles definition window appears (Figure 12).

Figure 12. Role details: Assign Privileges tab



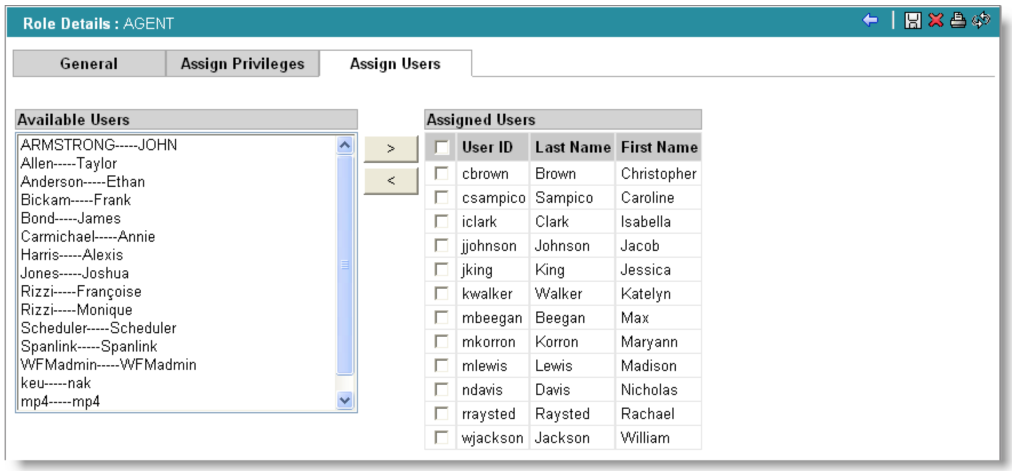
Assigning users to a role

To assign users to a role:

1. From the Role Details window, click the **Assigned Users** tab.

2. The Assigned Users tab on the Roles definition window appears (Figure 13).

Figure 13. Role Details: Assigned Users tab



3. Select the users you want to assign or unassign by holding down the Ctrl key to select multiple users. To assign selected users, click the right arrow button to move them to the Assigned Users side. To unassign selected users, click the left arrow button to move them to the Available Users side.
4. Click  to save your changes.

Managing views

In WFM, a *view* is a collection of entities that defines the scope of privileges and level of accessibility a user has in WFM. These entities are:

- Users
- Contact service queues
- CSQ mappings
- Teams
- Work conditions
- Work shifts
- Exceptions

These entities are defined in the Environment and Agent sections of the WFM GUI. For more information, see the *Cisco Unified Workforce Optimization Workforce Management Supervisor User Guide*.

What does a view do?

When you assign a view to a user, for example a scheduler, the user can only perform tasks against entities to which the user is assigned. A view restricts the scope of information that a user can see or change. For example, you can assign a view that is associated with a site to one or more users. Or you can assign an area within a site to a user.

Note that views do not include agents directly. Views include teams and an agent would have access to a view through their team. A schedule can only schedule an agent if the agent's team is included in one of the scheduler's views.

A WFM entity can be included in one or multiple views. A user can be assigned to one or multiple views.

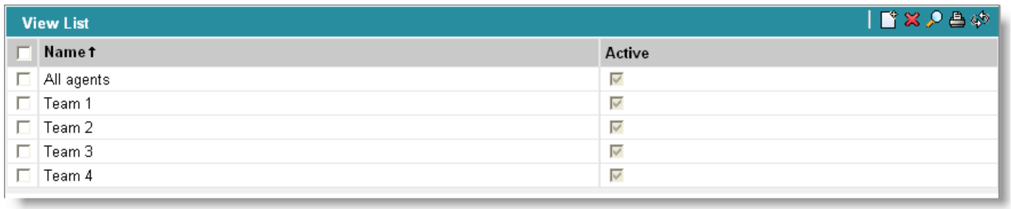
Creating or editing a view

To create a new view:

1. From the main menu, choose **Administration** > **Views.**

   The View List appears (Figure 14).

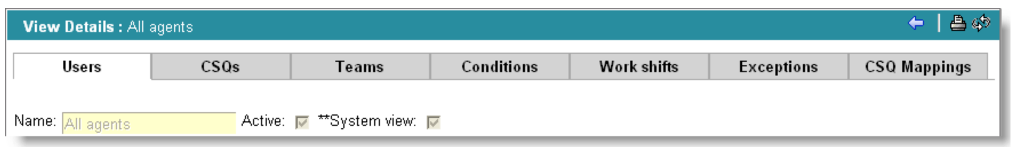
Figure 14. View List



2. Click to create a new view.

   The View Details window appears (Figure 15).

Figure 15. View Details



3. Enter the name for the view.
4. Click **Active**.

   NOTE: WFM creates a System view to receive all newly created views.This field cannot be updated. In the example above, All agents is the system view.

5. Click to save your changes.

   The CSQs, Teams, Work conditions, Work shifts, Exceptions and CSQ mappings tabs appear.

To edit a view:

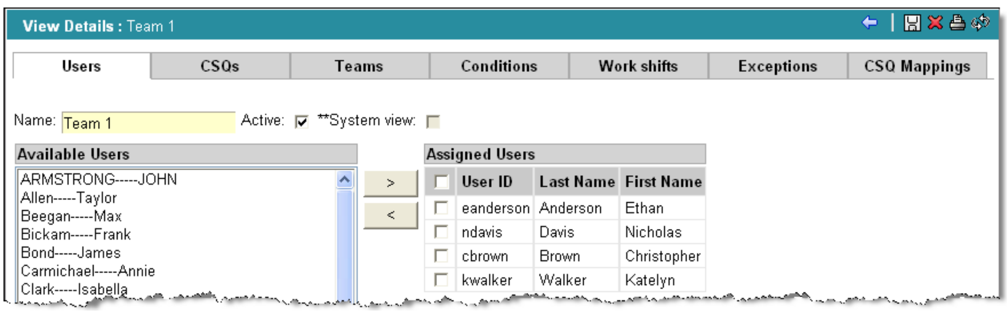
1. From the main menu, choose **Administration** > **Views**.
2. Click the name of a view.
3. Apply changes to the view.
4. Click to save your changes.

Assign users to a view

To assign users to a view:

1. From the Users tab on the Data views definition window (Figure 16), select the users you want to assign or unassign holding down the Ctrl key to select multiple users. To assign selected users, click the right arrow button to move them to the Assigned Users side. To unassign selected users, click the left arrow button to move them to the Available Users list.

Figure 16. Data views definition: User tab



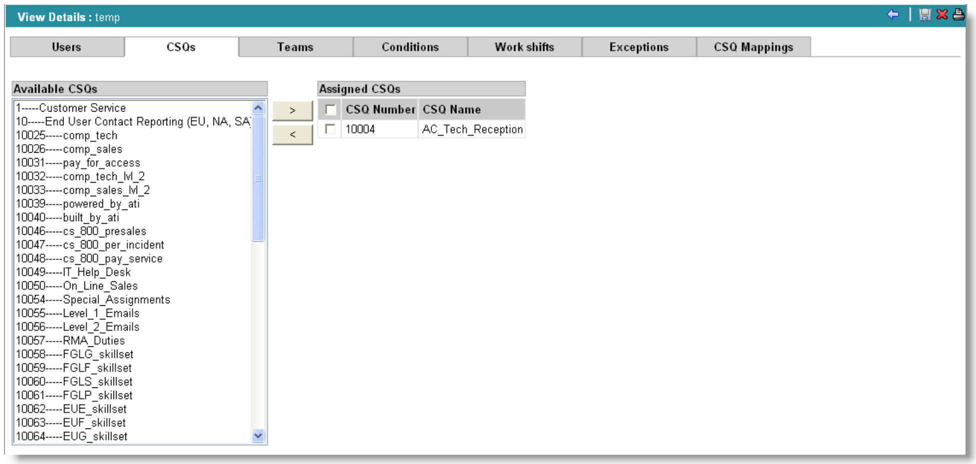
2. Click  to save your changes when you are finished with all tabs in this window.

Assigning CSQs to a view

To assign CSQs to a view:

1. From the CSQs tab on the Data views definition window (Figure 17), select the CSQs you want to assign or unassign holding down the Ctrl key to select multiple CSQs. To assign selected CSQs, click the right arrow button to move them to the Assigned CSQs side. To unassign selected CSQs, click the left arrow button to move them to the Available CSQs list.

Figure 17. Data views definition: CSQs tab



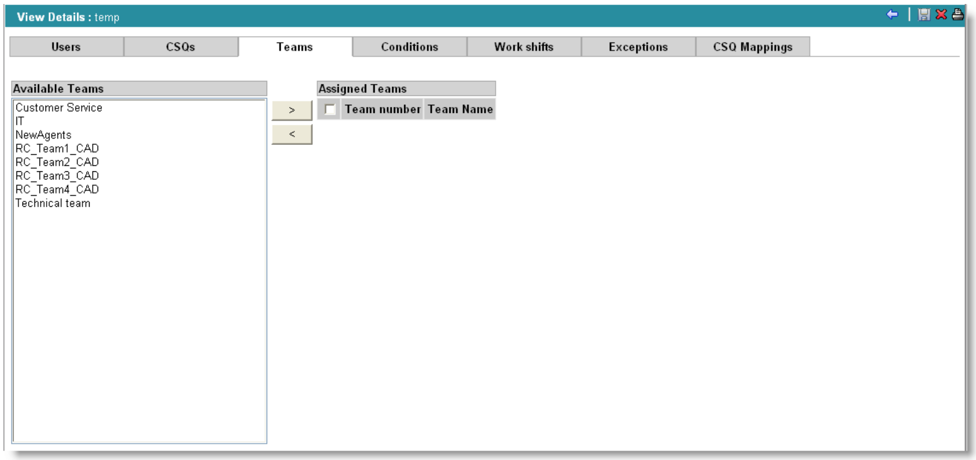
2. Click  to save your changes when you are finished with all tabs in this window.

Assigning teams to a view

To assign teams to a view:

1. From the Teams tab on the Data views definition window (Figure 18), select the teams you want to assign or unassign holding down the Ctrl key to select multiple teams. To assign selected teams, click the right arrow button to move them to the Assigned Teams side. To unassign selected teams, click the left arrow button to move them to the Available Teams list.

Figure 18. Data views definition: Teams tab



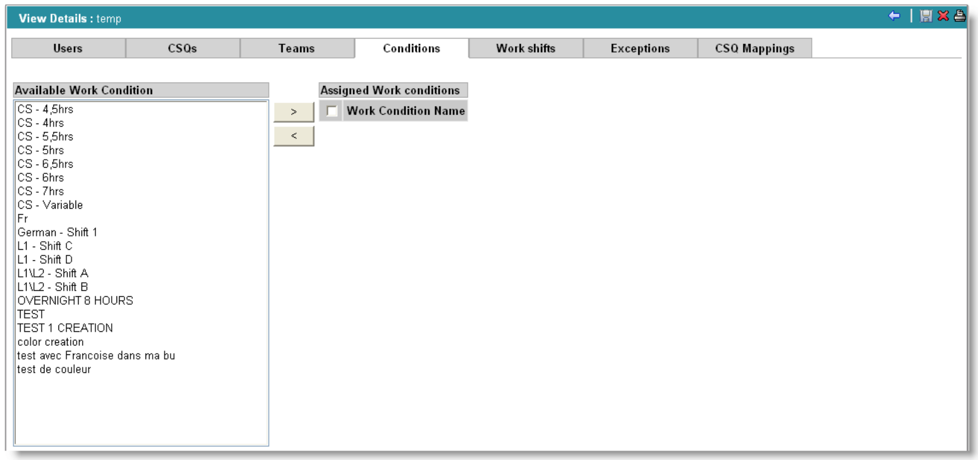
2. Click to save your changes when you are finished with all tabs in this window.

Assigning work conditions to a view

To assign work conditions to a view:

1. From the Conditions tab on the Data views definition window (Figure 19), select the work conditions you want to assign or unassign holding down the Ctrl key to select multiple work conditions. To assign selected work conditions, click the right arrow button to move them to the Assigned Work conditions side. To unassign selected work conditions, click the left arrow button to move them to the Available Work Conditions list.

Figure 19. Data views definition: Conditions tab



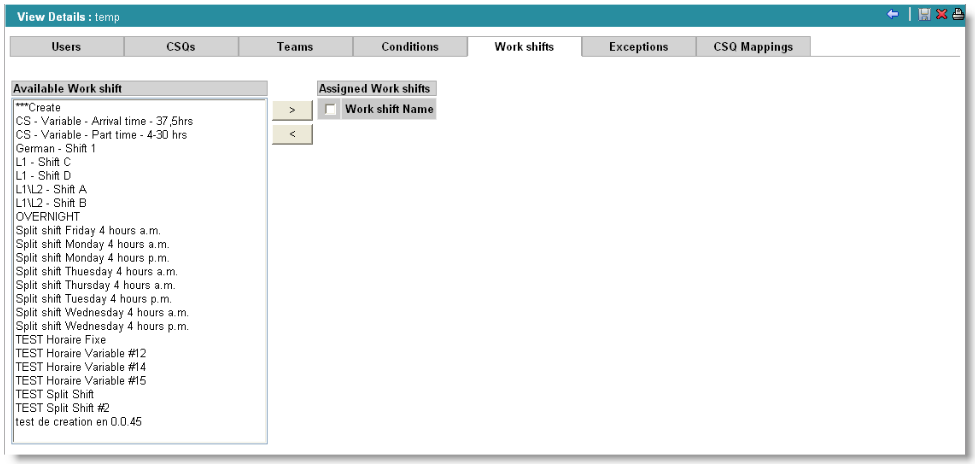
2. Click to save your changes when you are finished with all tabs in this window.

Assigning work shifts to a view

To assign work shifts to a view:

1. From the Work shifts tab on the Data views definition window (Figure 20), select the work shifts you want to assign or unassign holding down the Ctrl key to select multiple work shifts. To assign selected work shifts, click the right arrow button to move them to the Assigned Work shifts side. To unassign selected work shifts, click the left arrow button to move them to the Available Work shifts list.

Figure 20. Data views definition: Work shifts tab



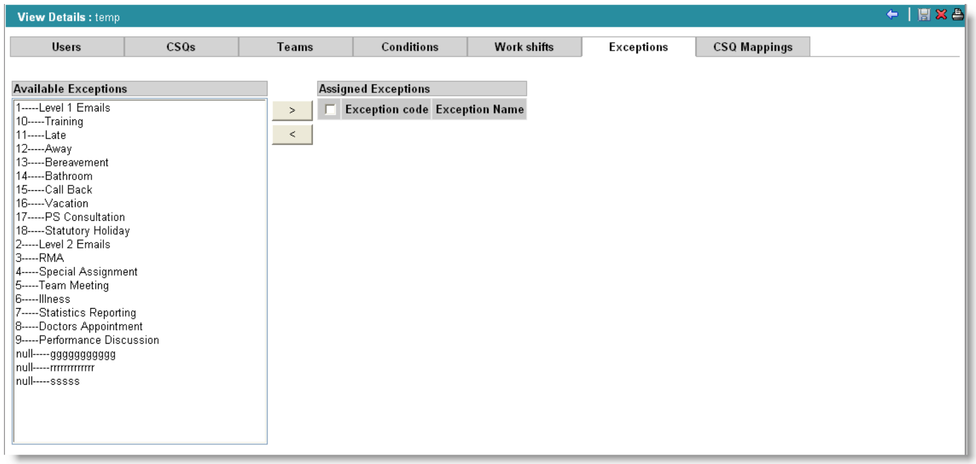
2. Click [save icon] to save your changes when you are finished with all tabs in this window.

Assigning exceptions to a view

To assign exceptions to a view:

1. From the Exceptions tab on the Data views definition window (Figure 21), select the exceptions you want to assign or unassign holding down the Ctrl key to select multiple exceptions. To assign selected exceptions, click the right arrow button to move them to the Assigned Exceptions side. To unassign selected exceptions, click the left arrow button to move them to the Available Exceptions list.

Figure 21. Data views definition: Exceptions tab



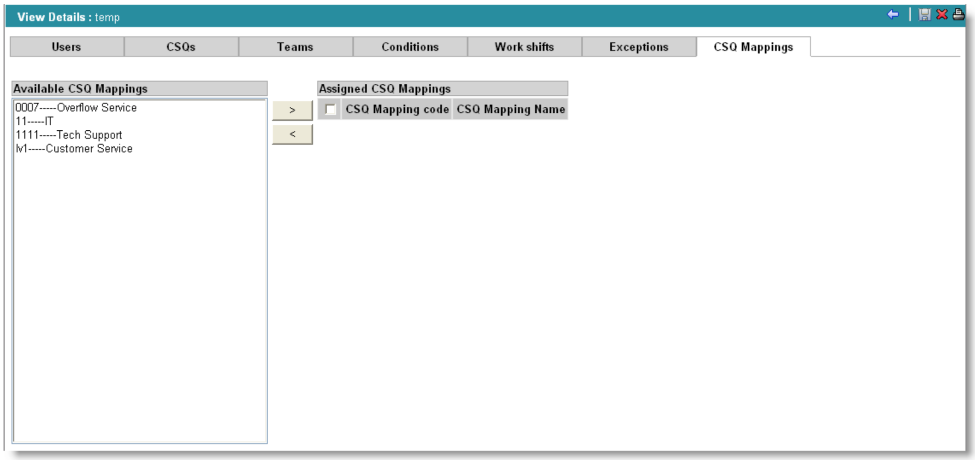
2. Click  to save your changes when you are finished with all tabs in this window.

Assigning CSQ mappings to a view

To assign CSQ mappings to a view:

1. From the CSQ Mappings tab on the Data views definition window (Figure 22), select the CSQ mappings you want to assign or unassign holding down the Ctrl key to select multiple CSQ mappings. To assign selected CSQ mappings, click the right arrow button to move them to the Assigned CSQ Mappings side. To unassign selected CSQ mappings, click the left arrow button to move them to the Available CSQ Mappings list.

Figure 22. Data views definition: CSQ Mappings tab



2. Click  to save your changes when you are finished with all tabs in this window.

Deleting a view

To delete a view:

1. From the main menu, choose **Administration** > **Views.**
2. To delete one or many views, select the check box next to each view and click  (Delete).

   To delete all views, select the check box in the header (beside Number) and click  (Delete).

   The Workforce Management dialog box appears.
3. Click **OK** to dismiss the dialog.

Managing users

There are two ways in which users can be created in WFM:

- WFM can use the synchronization process to automatically create a user for each agent and supervisor in Unified CCX.

  NOTE: The Sync service must be started and running as authenticating user for WFM to retrieve agents and supervisors from Unified CCX. For more information on the Sync service, see the *Cisco Unified Workforce Optimization Workforce Management Installation Guide*.

  When the synchronization process extract a user identity from Unified CCX, the user identity in WFM initially has the following values:

  — Last name — This is the last name used in Unified CCX.

  — First name — This is the first name used in Unified CCX.

  NOTE: If the last name or first name changes in Unified CCX, the synchronization service will change them in WFM.

  — User code — This is the Resource ID from Unified CCX. You cannot change this value.

  — Password — Initially the password has a null value. You must assign a password to the user.

  — Associated agent identity — WFM assigns an agent identity in WFM Agent administration.

- You can add, delete and update users in WFM who have no agent or supervisor identity in Unified CCX.

  NOTE: Best practices recommends that you manage agent and supervisor identities through Unified CCX and allow the synchronization server to automatically create a user identity for each agent and supervisor in Unified CCX. You only need to create administrators and schedulers in WFM. The administrators and schedulers have no identity in Unified CCX.

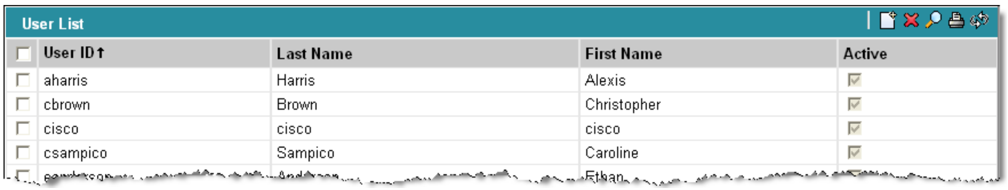
Creating or editing a user

To create a new user:

1. From the main menu, choose Administration > Users.

The User List appears (Figure 23).

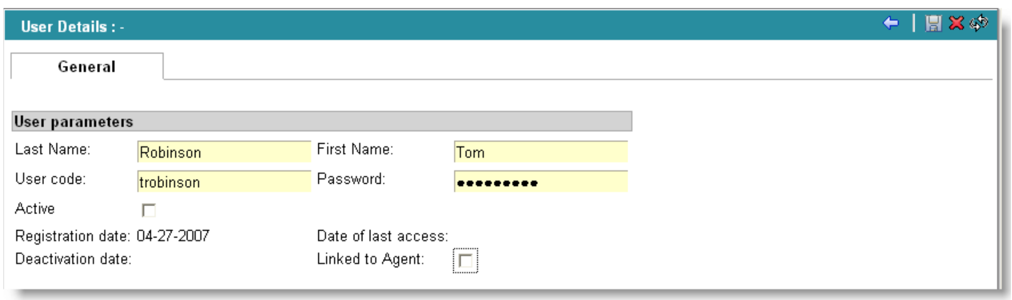
Figure 23. User List



2. Click to create a new user.

   The General Tab on the User definition window appears (Figure 24).

Figure 24. User definition: General tab



3. Complete the fields.

Field Name	Description
Last name	Enter the user's last name.
First name	Enter the user's first name.
User code	Enter the user code if your call center has a user code structure. A user enters this user code when they log into the Workforce Management. We suggest you use the windows login name.
Password	Enter a user password.
Active	Select this check box to activate the user.
Linked to an agent	When this check box is selected, a drop-down list appears. Select an agent from this list to be associated with the user. **NOTE:** For agents, you must associate an agent with the user so the agent can log into the system and access My Page.

4. Click to save your changes.

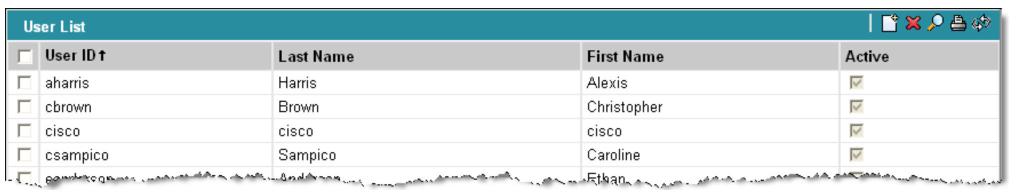
   Associated role and Associated view tabs appear.

To edit a user:

1. From the main menu, choose **Administration** > **Users.**

   The User List appears (Figure 25).

Figure 25. User List



2. Click the **User ID** you want to edit.
3. Apply changes to the user.
4. Click to save your changes.

Assigning roles to a user

To assign roles to a user:

1. From the Users Detail window, click the **Assign Roles** tab.

   The Assign Roles tab on the User Details window appears (Figure 26).

Figure 26. User Details: Assign Roles tab

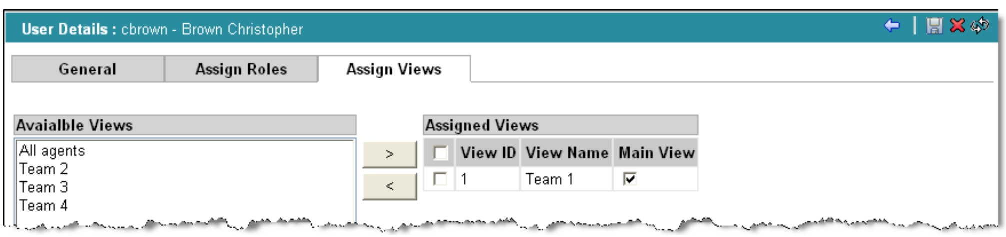
2. Select the roles you want to assign or unassign holding down the Ctrl key to select multiple roles. To assign selected roles, click the right arrow button to move them to the Assigned roles side. To unassign selected roles, select the check box next to each view and click the left arrow button to move them to the Available roles list.
3. Click  to save your changes.

Assigning views to a user

To associate views to a user:

1. From the User Details window, click the **Associated view** tab.
2. The Associated view tab on the User Details window appears (Figure 27).

Figure 27. User Details: Assign views tab



3. Select the views you want to assign or unassign holding down the Ctrl key to select multiple views. To assign selected views, click the right arrow button to move them to the Assigned Views side. To unassign selected views, select the check box next to each view and click the left arrow button to move them to the Available views list.
4. Select at least one check box in the Main view column. All newly created CSQs, teams, etc. are automatically associated with this main view.
5. Click  to save your changes.

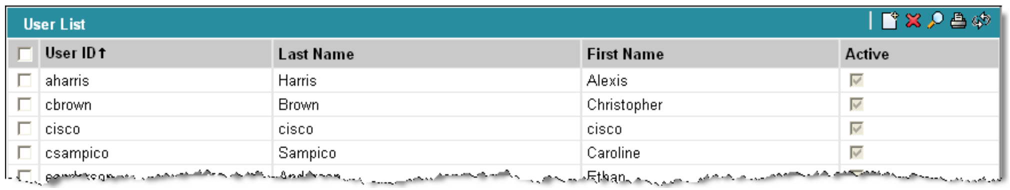
Deleting a user

To delete a user:

1. From the main menu, choose **Administration** > **Users.**

   The User List appears (Figure 28).

Figure 28. User List



2. To delete one or many users, select the check box next to each user and click (Delete).

   To delete all users, select the check box in the header (beside Number) and click (Delete).

   The Workforce Management dialog box appears.

3. Click **OK** to dismiss the dialog.

Managing the default system configuration

From the Default Configuration, you can set the default values for the WFM system in the following areas:

- Date format
- Dashboard
- Schedules

When a user logs into Workforce Management for the first time, these preferences will be active by default.

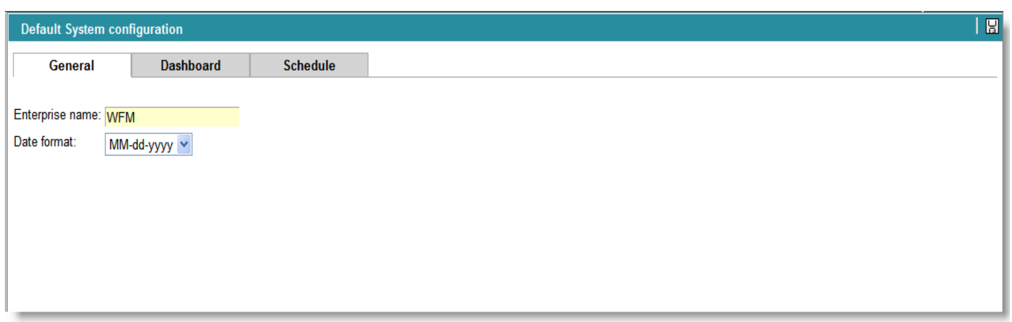
Configuring the WFM system

To configure the WFM system:

1. From the main menu, choose **Administration** > **Default Configuration.**

   The General tab on the Default system configuration window appears (Figure 29).

Figure 29. Default system configuration: General tab



2. Complete the fields.

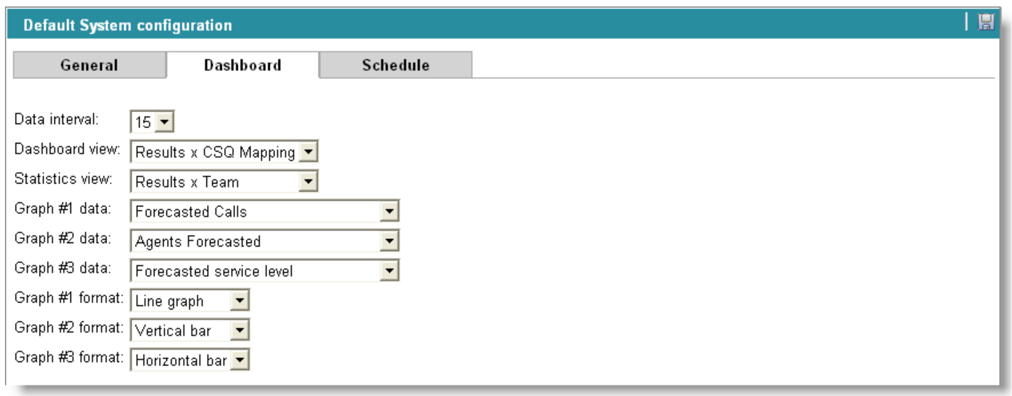
Field Name	Description
Enterprise name	Enter the name of your company.
Date format	Select the default system date format.

Configuring the dashboard

To configure the dashboard:

1. From the Default System Configuration window, click the **Dashboard** tab (Figure 30).

Figure 30. Default System Configuration: Dashboard tab



2. Complete the fields.

Field Name	Description
Data interval	Select the interval in which you want the data to be displayed. You can choose 15, 30 or 60 minute intervals.
Dashboard view	Select the default dashboard view for all users.*
Statistics view	Select the default statistics view for all users.*
Graph 1, 2 and 3 data	Select the type of data to appear on the dashboard.*
Graph 1, 2 and 3 format	Select the format type to be applied to the related data on the dashboard.*

* A user can change the default view by changing their preferences as described in "Accessing the Preferences feature" on page 14.

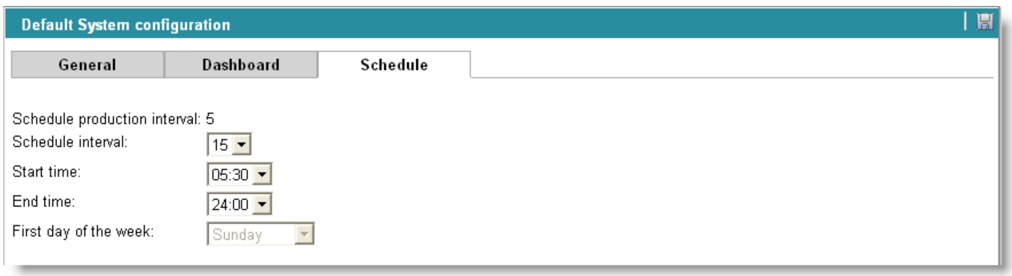
3. Click  to save your changes.

Configuring the default schedule format

To configure the default schedule format:

1. From the Default System configuration window, click the **Schedule** tab (Figure 31).

Figure 31. Default System configuration: Schedule tab



2. Complete the fields.

Field Name	Description
Schedule production interval	Displays the schedule interval in minutes. This value is determined when the database is created.
Schedule interval	Select the interval in which you want the data to be displayed. You can choose 15, 30 or 60 minute intervals.
Start time	Select the default schedule display start time.*
End time	Select the default schedule display end time.*
First day of the week	Displays the first day of the week. This value is determined when the database is created.

* A user can chance the default view by changing their preferences as described in "Accessing the Preferences feature" on page 14.

3. Click  to save your changes.

Managing requests to the server

From Server Requests, you can monitor the status of requests to generate distributions, forecasts and schedules. You can also delete incomplete requests.

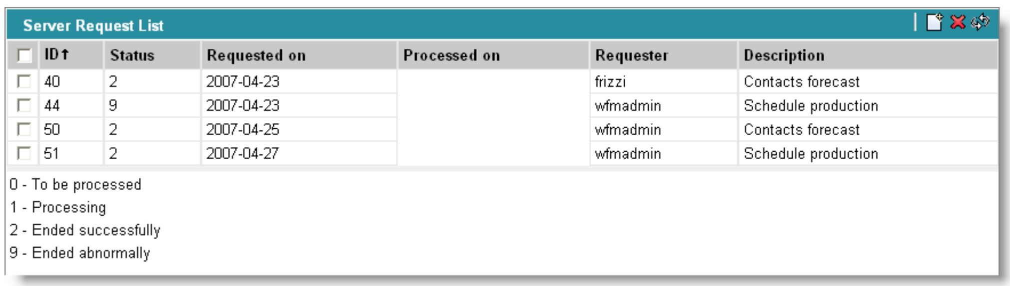
Displaying the request details

To display a request details:

1. From the main menu, choose **Administration** > **Server requests.**

   The Server request list appears (Figure 32).

Figure 32. Server request list



Server Request List

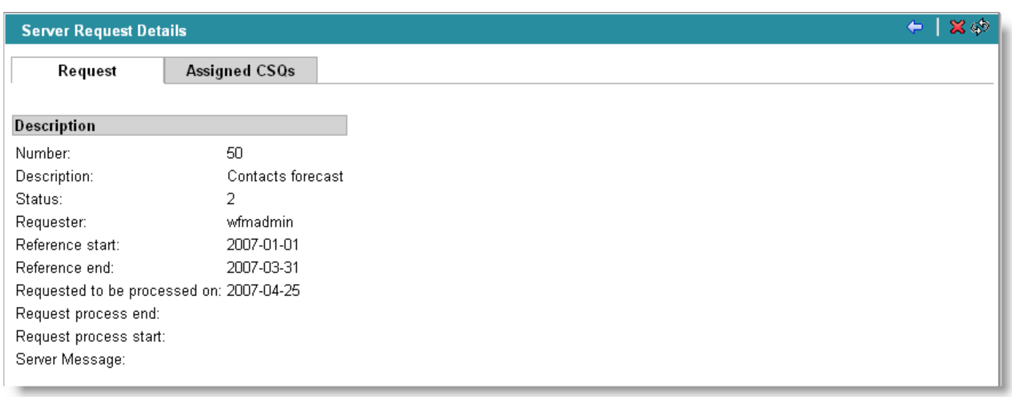
	ID↑	Status	Requested on	Processed on	Requester	Description
☐	40	2	2007-04-23		frizzi	Contacts forecast
☐	44	9	2007-04-23		wfmadmin	Schedule production
☐	50	2	2007-04-25		wfmadmin	Contacts forecast
☐	51	2	2007-04-27		wfmadmin	Schedule production

0 - To be processed
1 - Processing
2 - Ended successfully
9 - Ended abnormally

2. Click a number under the **ID** column.

   The Server Request Details window appear (Figure 33).

Figure 33. Server Request Details



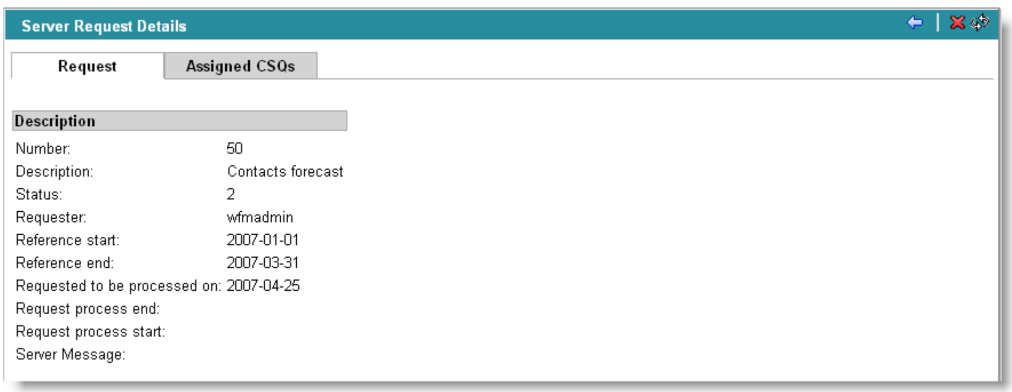
Deleting a request

To delete a request:

1. From the Server Request Details window (Figure 34), click to delete a request.

   NOTE: You can only delete requests with the status 0, 2 or 9. A status of 1 indicates the request is currently processing and cannot be deleted.

Figure 34. Server Request Details



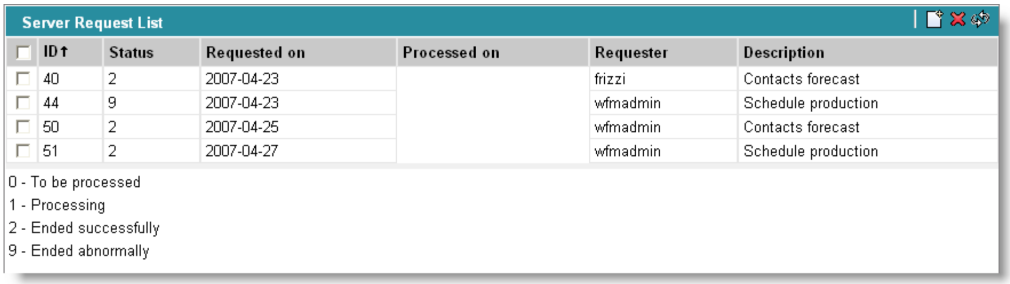
Deleting multiple requests

To delete requests:

1. From the main menu, choose **Administration** > **Server requests.**

   The Server request list appears (Figure 35).

Figure 35. Server request list



Server Request List

	ID	Status	Requested on	Processed on	Requester	Description
	40	2	2007-04-23		frizzi	Contacts forecast
	44	9	2007-04-23		wfmadmin	Schedule production
	50	2	2007-04-25		wfmadmin	Contacts forecast
	51	2	2007-04-27		wfmadmin	Schedule production

0 - To be processed
1 - Processing
2 - Ended successfully
9 - Ended abnormally

2. To delete requests, select the check box next to each request and click . To delete all requests, select the check box in the header and click .

   NOTE: You can only delete requests with the status 0, 2 or 9. A status of 1 indicates the request is currently processing and cannot be deleted.

Managing compilation requests

From Compilation Requests, you can monitor the status of request to compile various historical measurements from the data that was extracted from the historical data tables in Unified CCX and delete incomplete requests.

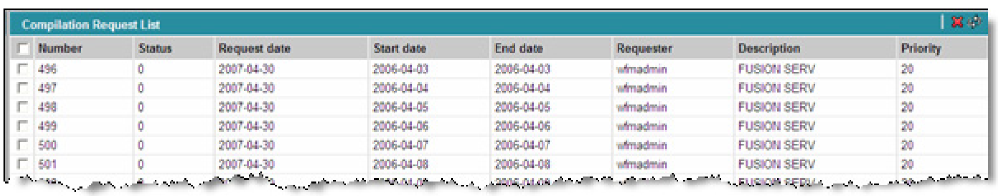
Displaying compilation requests

To display compilation requests to the server:

1. From the main menu, choose **Administration** > **Compilation requests.**

   The Compilation request list appears (Figure 36).

Figure 36. Compilation request list



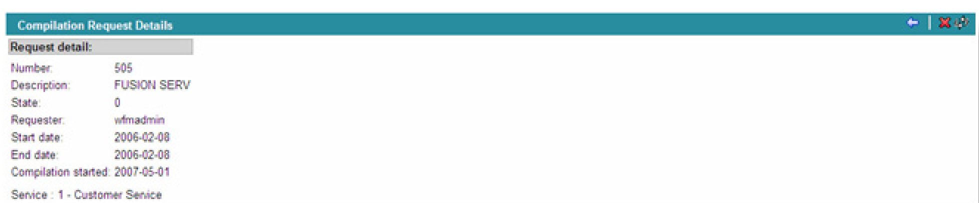
Compilation Request List

Number	Status	Request date	Start date	End date	Requester	Description	Priority
496	0	2007-04-30	2006-04-03	2006-04-03	wfmadmin	FUSION SERV	20
497	0	2007-04-30	2006-04-04	2006-04-04	wfmadmin	FUSION SERV	20
498	0	2007-04-30	2006-04-05	2006-04-05	wfmadmin	FUSION SERV	20
499	0	2007-04-30	2006-04-06	2006-04-06	wfmadmin	FUSION SERV	20
500	0	2007-04-30	2006-04-07	2006-04-07	wfmadmin	FUSION SERV	20
501	0	2007-04-30	2006-04-08	2006-04-08	wfmadmin	FUSION SERV	20

2. Click a number under the **ID** column.

   The Compilation request details appear (Figure 37).

Figure 37. Compilation request details



3. To delete the displayed request, click .

   NOTE: You can only delete requests with the status 0, 2 or 9. A status of 1 indicates the request is currently processing and cannot be deleted.

4. To refresh the requests, click .

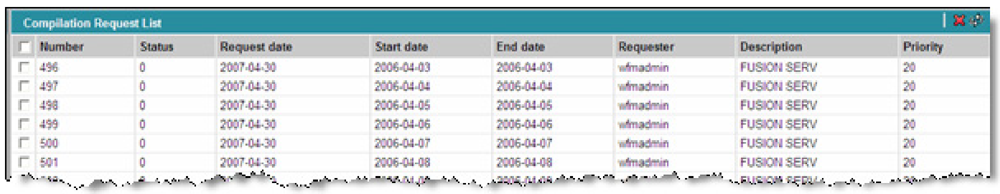
Deleting requests

To delete requests:

1. From the main menu, choose Administration > Compilation requests.

   The Compilation request list appears (Figure 38).

Figure 38. Compilation request list



Compilation Request List

	Number	Status	Request date	Start date	End date	Requester	Description	Priority
	496	0	2007-04-30	2006-04-03	2006-04-03	wfmadmin	FUSION SERV	20
	497	0	2007-04-30	2006-04-04	2006-04-04	wfmadmin	FUSION SERV	20
	498	0	2007-04-30	2006-04-05	2006-04-05	wfmadmin	FUSION SERV	20
	499	0	2007-04-30	2006-04-06	2006-04-06	wfmadmin	FUSION SERV	20
	500	0	2007-04-30	2006-04-07	2006-04-07	wfmadmin	FUSION SERV	20
	501	0	2007-04-30	2006-04-08	2006-04-08	wfmadmin	FUSION SERV	20

2. To delete requests, select the check box next to each request and click . To delete all requests, select the check box in the header and click .

   NOTE: You can only delete requests with the status 0, 2 or 9. A status of 1 indicates the request is currently processing and cannot be deleted.

Managing generic exceptions

From Generic Exceptions, you can create a system-wide list of exception types that appear as options an agent can select from their My Page (eAgent services) when they request time off. A *generic exception* is a high level global type exception. For example, a generic exception could be absence, sick leave or vacation. If an agent has a doctor appointment, the agent selects the sick leave generic exception and specifies a doctor appointment.

The generic exception types that you create in Generic Exceptions can be a subset of the overall list of exception types that was created in the Environment section of the WFM GUI. For more information on exception types, see the *Cisco Unified Workforce Optimization Workforce Management Supervisor User Guide*. Alternatively, you can create a few general exception types in Generic Exceptions.

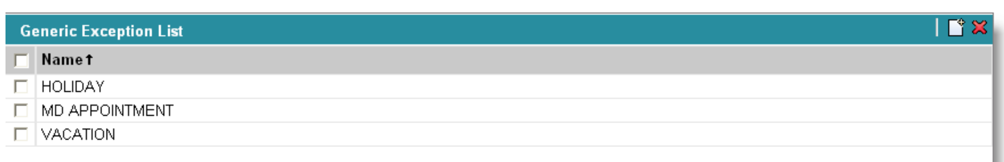
Creating a generic exception

To create a generic exception:

1. From the main menu, choose **Administration** > **Generic exceptions.**

   The Generic Exception List appears (Figure 39).

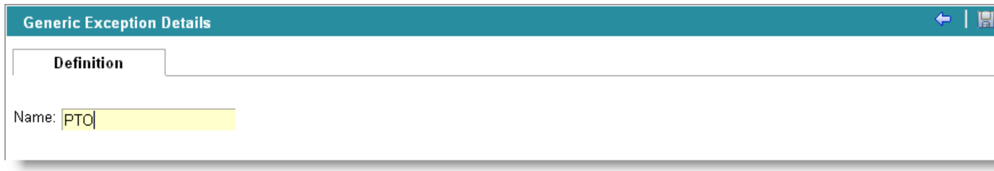
Figure 39. Generic Exception List



2. Click to create a new generic exception.

   The Generic exception detail appears (Figure 40).

Figure 40. Generic Exception Details



3. Enter the name for the exception.
4. Click to save your changes.

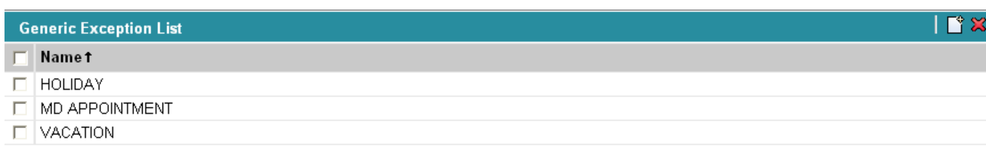
Editing a generic exception

To edit a generic exception:

1. From the main menu, choose Administration > Generic exceptions.

   The Generic Exception List appears (Figure 41).

Figure 41. Generic Exception List



2. Click the name of the generic exception.
3. Apply changes to the generic exception.
4. Click to save your changes.

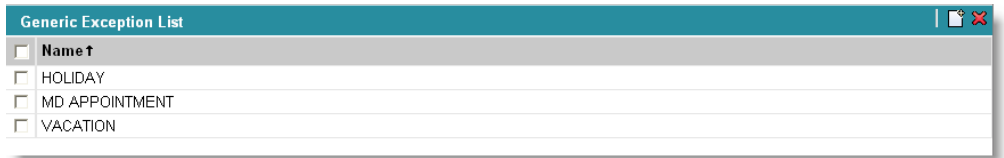
Deleting a generic exception

To delete a generic exception:

1. From the main menu, choose Administration > Generic exceptions.

   The Generic Exception List appears (Figure 42).

Figure 42. Generic Exception List



2. To delete one or many generic exceptions, select the check box next to each generic exception and click (Delete).

   To delete all generic exceptions, select the check box in the header (beside Number) and click (Delete).

   The Workforce Management dialog box appears.

3. Click **OK** to dismiss the dialog.

Index

P

R

S

U

V