



Release Notes for Cisco Workforce Management 8.2(2)

Revised: May 13, 2009

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Introduction

This document describes changes and caveats for Cisco Workforce Management (WFM) 8.2(2).

This document is a supplement to the *Release Notes for Workforce Management 8.2(1) for Cisco Unified Workforce Optimization* available at:

http://www.cisco.com/en/US/products/ps8293/prod_release_notes_list.html

Use these release notes in conjunction with the above release notes.



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About Release 8.2(2)

WFM 8.2(2) is a maintenance release built on WFM 8.2(1). It includes the following fixes and enhancements:

- Support for Cisco Unified Contact Center Express 7.0
- Resolves discrepancies between WFM and enterprise data
- Resolves schedule editing issues
- Additional fixes as detailed in ["Resolved Caveats" on page 6](#)

A maintenance release is an incremental release of software that provides fixes for defects, including all fixes contained in previous maintenance releases. There are two types of maintenance releases: service releases (SR) and update releases. The SR release can be installed over the base release and uninstalled to return to the base release. An update release requires that you uninstall the base release before you install the update release. To return to the base release from an update release, you must uninstall the update release and reinstall the base release.

WFM 8.2(2) is an update release. You must uninstall WFM 8.2(1) or 8.2(1) SR1 before you can install WFM 8.2(2). You cannot uninstall WFM 8.2(2) to return to the base release WFM 8.2(1) or 8.2(1) SR1. Uninstalling WFM 8.2(2) removes WFM from your machine.

The maintenance release is available on CD only.

WFM Maintenance Release Installation Planning

This section provides information to help you understand when to install a WFM maintenance release and the tasks it involves. It contains the following subsections:

- [When to Install a WFM Maintenance Release](#)
- [Installation Order for WFM Components](#)
- [WFM Maintenance Release Installation Checklist](#)

When to Install a WFM Maintenance Release

Installing a WFM maintenance release requires temporarily stopping all WFM services and processes on your WFM server. Therefore, to limit impact to a live WFM system, schedule and install WFM maintenance releases during a maintenance period when your WFM system is out of production.

Installation Order for WFM Components

WFM only supports a single WFM server. The WFM maintenance release is installed on the WFM server.

WFM Maintenance Release Installation Checklist

Deploying a WFM maintenance release requires the following general tasks:

Step 1 Schedule a maintenance period for installation. Because WFM maintenance release installation requires bringing down a WFM system, schedule maintenance release installation for a maintenance period when your WFM system is out of production.

Step 2 Back up your SQL Server WFM 8.2(1) or 8.2(1) SR1 database using SQL Server backup tools.



Note Do not remove the SQL Server WFM 8.2(1) or 8.2(1) SR1 database. The SQL Server WFM 8.2(1) or 8.2(1) SR1 database is required during the upgrade process. Backing up your database is recommended in case a problem occurs during the upgrade.

Step 3 Uninstall the base release on the WFM server. See “[Uninstallation](#)” for instructions.



Note Removing an SR if you have 8.2(1) SR 1 installed, takes approximately 10 minutes followed by a reboot of the server. Removing 8.2(1) takes approximately 10 minutes and the system does not reboot.

Step 4 Install the maintenance release on the WFM server. See “[Installation](#)” for instructions.



Note Installing WFM 8.2(2), including the configuration setup, takes approximately 30-40 minutes.

Step 5 After installation, log into WFM as an administrator and test your WFM system to ensure that it is working properly.

Step 6 From the WFM interface, choose Agents > Agents. If the right pane displays a list of agents, the synchronization was successful.

Step 7 Log into the WFM server as the local machine administrator and navigate to C:\Program Files\Cisco\WFO_WFM\log. Open the OOC Service log file, which is named <yyyymmdd>-ooCollector.log, where <yyyymmdd> is the date. Verify that the log file does not contain any error messages.

Installation

If you are updating WFM 8.2(1) or WFM 8.2(1) SR1, use the following instructions to install WFM 8.2(2). If you are installing WFM for the first time, follow the instructions in the *Workforce Management Installation Guide for Cisco Unified Workforce Optimization*.



Note Before you upgrade, consider running the WFM 8.2(1) or 8.2(1) SR1 version of WFM Configuration Setup so you can make a note of the settings you used when you installed WFM 8.2(1) or 8.2(1) SR1. Your WFM 8.2(1) or 8.2(1) SR1 settings are not maintained during the upgrade process. You will need to enter them again after you install WFM 8.2(2). See the *Installation Guide for Cisco Unified Workforce Optimization* for instructions on running the Configuration Setup.

Step 1 Log into the WFM server as the local machine administrator.



Note You can log into the WFM server remotely using Virtual Network Computing (VNC) software. See the documentation that came with your VNC software for instructions on establishing a remote connection to another machine.

Step 2 Download the setup.exe from the WFM 8.2(2) CD to a directory on the WFM server and run setup.exe.



Note The setup.exe automatically stops the WFM services.

Step 3 Follow the instructions in the InstallShield wizard to complete the installation. For additional information, see the *Workforce Management Installation Guide for Cisco Unified Workforce Optimization*.



Note The setup.exe automatically restarts the WFM services.

Uninstallation

To completely remove WFM, follow the instructions in the *Workforce Management Installation Guide for Cisco Unified Workforce Optimization*.

Restore the Previous Release

To restore a previous release:

Step 1 Completely remove WFM 8.2(2) by following the instructions in the *Workforce Management Installation Guide for Cisco Unified Workforce Optimization*.

Step 2 Restore the backup database for WFM 8.2(1) to the SQL database directory.

Step 3 Install WFM 8.2(1) by following the installation instructions in the *Workforce Management Installation Guide for Cisco Unified Workforce Optimization*.

Step 4 If required, install WFM 8.2(1) SR1 by following installation instructions in the *Release Notes for Workforce Management 8.2(1) SR1 for Cisco Unified Workforce Optimization*.

Limitations and Workarounds

Column sorting does not work after a manual refresh in Adherence

Problem: When WFM first displays the Adherence pane, the columns can be sorted. When you refresh the Adherence pane, column sorting no longer works on the Adherence pane.

Solution: Exit the Adherence pane and return to the Adherence pane. When you return to Adherence pane, sort the columns before manually refreshing the pane.

Teams with names longer than 25 characters are not imported to WFM

Problem: WFM cannot import teams with names longer than 25 characters. This problem occurs any time a team name contains more than 25 characters.

Solution: Choose one of the following options:

- Make sure all the team names in Unified CCX contains 25 or fewer characters.
- Manually create the team names in WFM and assign the required agents.

Open Caveats

The following issues are open in WFM 8.2(2).



Note

You can view more information and track individual WFM defects using the Cisco Bug Toolkit located at: http://www.cisco.com/support/bugtools/Bug_root.html.

Table 1 *Open caveats in release 8.2(2)*

CDETS Number	Severity	Headline
CSCsi99935	3	Column sorting does not work after a manual refresh in Adherence
CSCsI06610	3	Teams with names longer than 25 characters are not imported to WFM
CSCsq30278	3	Internet Explore not responding

Resolved Caveats

The following issues have been resolved in WFM 8.2(2).


Note

You can view more information and track individual WFM defects using the Cisco Bug Toolkit located at: http://www.cisco.com/support/bugtools/Bug_root.html

Table 2 *Caveats resolved in release 8.2(2)*

CDETS Number	Severity	Headline
CSCso67663	2	Number of calls received and handled in WFM variation from UCCX.
CSCso67760	2	The list of available agents is empty in the agent schedule trade screen
CSCso67778	2	WFM sync service does not restart automatically after CTI failure.
CSCso67804	2	Supervisor screen refresh problem
CSCso67723	2	Partial exceptions do not get applied correctly at schedule production.
CSCso80880	2	WFM Process server sometime stops and needs to be manually restarted.
CSCso67603	3	Hour Gap calculation is wrong in edit forecast
CSCs108287	3	Internal links in WFM online help documents do not work
CSCso67632	3	Data missing on Individual Schedule report.
CSCso67737	3	All Exceptions applied in schedule edits are the default color (red).
CSCso67768	3	Adherence % is not populated in Agent Report Card Report.
CSCsq30106	3	Agent and team productivity data is off by one day
CSCsq30201	3	Totals of paid and unpaid hours are wrong in schedule edit and detailed in
CSCsq30293	3	Exceptions are not updated thru schedule edit for certain scenarios

Documentation Updates

This section provides documentation changes that were unavailable when the Workforce Management for Cisco Unified Workforce Optimization release 8.2 documentation suite was released.

The following table lists the documents that are affected, the page(s) of the document on which the change appears, and the revision date.

Document name	Page(s)	Change type	Revision date
<i>Workforce Management Installation Guide</i>	16	omission	19 May 2008
	28	change	6 Nov 2007
	28	delete	19 May 2008
<i>Workforce Management Administrator User Guide</i>	24	Change	02 Apr 2009
	114	omission	19 May 2008
	115	change	19 May 2008
	151	omission	19 May 2008
	161	omission	19 May 2008
	239	add	19 May 2008
	244	omission	19 May 2008
	288	change	19 May 2008
	295-299	change	19 May 2008

Workforce Management Installation Guide

System Environment

The following statement on page 28 of the *Workforce Management Installation Guide* was incorrect. WFM has been verified in the following configurations:

Table 3 *Verified configurations*

ACD	PBX
Unified CCX 5.0	Cisco Unified CallManager (Unified CM) 5.1, 6.1
Unified CCX 6.0	Unified CM 4.3

It should read as follows.

Table 4 *Verified configurations*

ACD	PBX
Unified CCX 4.1	Cisco Unified Communications Manager 4.3
Unified CCX 5.0	Cisco Unified CallManager (Unified CM) 5.1, 6.1

Table 4 **Verified configurations**

ACD	PBX
Unified CCX 6.0	Unified CM 4.3
Unified CCX 7.0	Unified CM 7.0

Verifying Prerequisites

The following note was omitted from page 28 of the *Workforce Management Installation Guide*.


Note

If you plan to use Active Directory to manage WFM user accounts, the WFM server must be part of the Active Directory domain.

The following information from page 28 of *Workforce Management Installation Guide* needs clarification. The guide states:

Before you install WFM, you must install and configure the following systems.

- Cisco Unified Contact Center Express (Unified CCX)
- Cisco Unified Communications Manager (Unified CM) or Unified Communications Manager Express (Unified CME)
- Cisco Unity server

In fact, a Cisco Unity server is not required for WFM. The last bullet point should be:

- Cisco Unity server, if you have a Unity server

Workforce Management Administrator User Guide

Creating a Work Condition

The following statement is incorrect on page 114 in the *Workforce Management Administrator User Guide*.

Minimum Delay	Enter the minimum delay using the HH:MM format. The minimum delay is the amount of time that must elapse between the shift arrival time and the start of the work condition activity.
Maximum Delay	Enter the maximum delay in hours and minutes using the HH:MM format. The delay is the maximum amount of time that must elapse between the shift arrival time and the start of the work condition activity.

The statement should read as follows.

Minimum Delay	Enter the minimum delay using the HH:MM format. The minimum delay is the minimum amount of time that must elapse between the shift arrival time and the start of the work condition activity.
Maximum Delay	Enter the maximum delay in hours and minutes using the HH:MM format. The maximum delay is the maximum amount of time that must elapse between the shift arrival time and the start of the work condition activity.

The following statement is incorrect on page 115 in the *Workforce Management Administrator User Guide*.

- Magenta for meal time

The statement should read as follows.

- Magenta for lunch time

Read lunch for meal throughout the document.

Column Headers for Schedule Reports

Added the description of Interval to the table on 239 of the *Workforce Management Administrator User Guide*.

Interval	<p>The schedule interval for the selected period. Use the following key to determine the scheduled activity for each interval.</p> <ul style="list-style-type: none"> • x — In service • B — Break • L — Lunch • C — Exception • H — Closed • - - — Not available • m — In contract (On Assignment) • P — In Project <p>This information only appears in the Schedule - Coverage per Interval Report.</p>
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Handling Email Options

The following topic was omitted from page 151 in the *Workforce Management Administrator User Guide*.

WFM provides forecast options for processing email contacts received during and after business hours. These options are available when you select Email as the CSQ Type when creating a forecast. See ["Generating an Email Forecast without Trends" on page 13](#) for additional information.

Handling Email Received During Business Hours

WFM provides the following options for processing email contacts received during business hours.

- **Linearly** — If you choose this option, WFM divides all email received during business hours by the number of intervals in a work shift to determine the number of email handled during each half hour.
- **No Deferring** — If you choose this option, agents must handle all email received during the half hour when they are received.
- **Non-Linearly** — If you choose this option, WFM schedules the agents to handle 50% of the email received during the first half hour and divides the number of email handled for each remaining half hour by 50%, until the last half hour in the work shift. During the last half hour in the work shift, the agents are expected to complete the remaining email.

Handling Email Received After Business Hours

WFM provides the following options for processing email contacts received after business hours.

- **Linearly** — If you choose this option, WFM divides all email received after business hours by the number of half hours in a work shift to determine the number of email handled during each half hour.
- **No Deferring** — If you choose this option, agents must handle all email received after business hours during the first half hour of the next day.
- **Non-Linearly** — If you choose this option, WFM schedules the agents to handle 50% of the email received after business hours during the first half hour and divides the number of email handled for each remaining half hour by 50%, until the last half hour in the work shift. During the last half hour in the work shift, the agents are expected to complete the remaining email.

Handling Email Examples

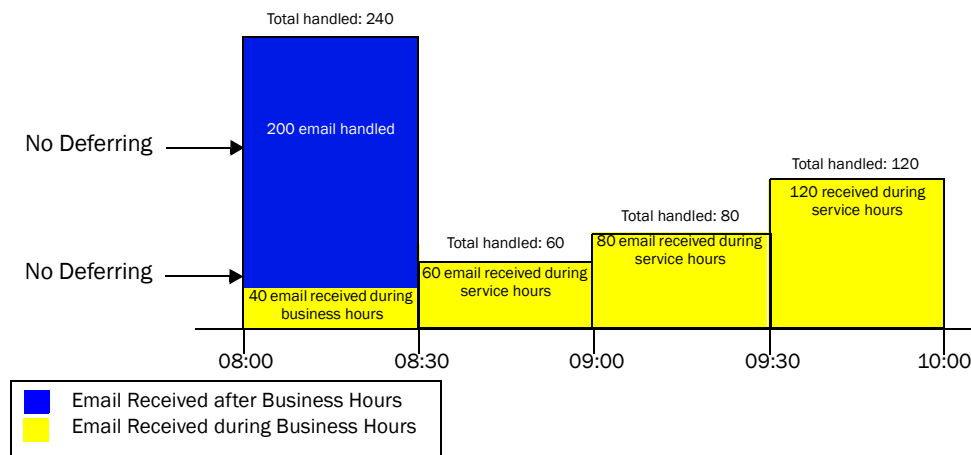
The following examples provide a unique combination of options for processing email contacts received during and after business hours. These examples assume 100% service level coverage for 2 hours of open service.

Example 1

In this example, 200 email are received after business hours. The CCC chose not to defer email (No Deferring) received during and after business hours. The No Deferring option during business hours requires agents to handle all email received when they are received. The No Deferring option after business hours requires agents to handle all email received after business hours during the first half hour of the next day.

During the first half hour (Figure 1) the agents process the 200 email received after business hours for the previous day and 40 additional email for a total of 240 email. The CCC receives and handles 60 email in the second half hour, 80 email in the third half hour and 120 email in the fourth half hour.

Figure 1 Handling Email Example 1

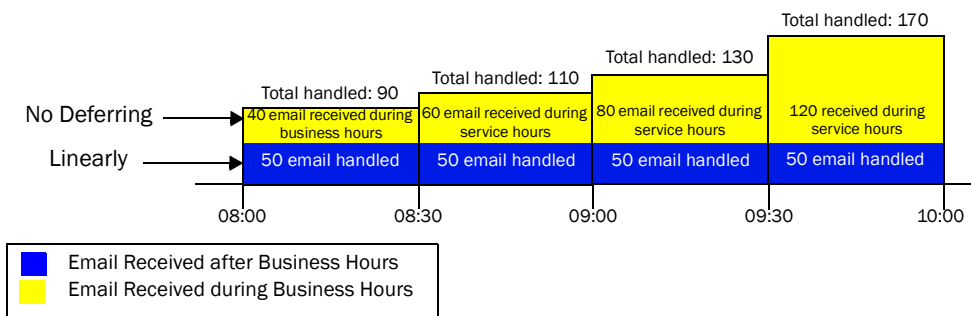


Example 2

In this example, 200 email are received after business hours. The CCC chose not to defer email (No Deferring) received during business hours and handle email received after business hours linearly. The No Deferring option requires agents to handle all email received during business hours when they are received. The Linearly option divides all email received after business hours by the number of half hours in the work shift to determine the number of email handled during each half hour. Agents must handle all email received during business hours as they are received.

During the first half hour (Figure 2) the agents process 50 email received after business hours for the previous day and 40 additional email for a total of 90 email. The agents continue to handle 50 email received after business hours during each remaining half hour in the work shift. The agents also handle all email received during each half hour.

Figure 2 Handling Email: Example 2



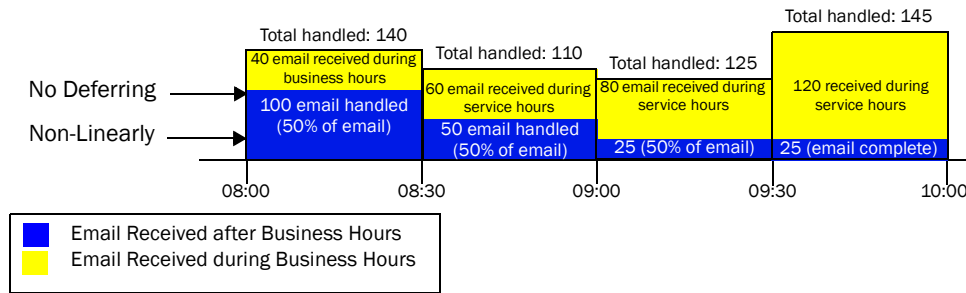
Example 3

In this example, 200 email are received after business hours. The CCC chose not to defer email (No Deferring) received during business hours and handle email received after business hours non-linearly. The No Deferring option requires agents to handle all email received during business hours when they are received. The Non-Linearly option schedules the agents to handle 50% of the email received after

business hours during the first half hour and divides the number of email handled for each remaining half hour by 50%, until the last half hour. During the last half hour, the agents are expected to complete the remaining email.

During the first half hour (Figure 3) the agents process 100 email received after business hours for the previous day and 40 additional email for a total of 140 email. The agents continue to handle 50% of all remaining email received after business hours during each remaining half hour in the work shift. The agents also handle all email received during each half hour.

Figure 3 Handling Email: Example 3

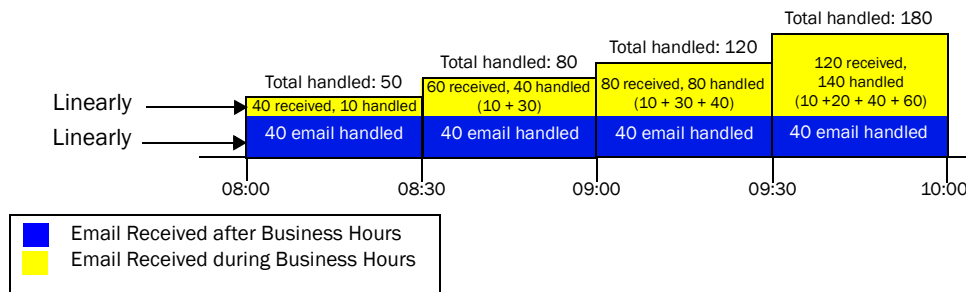


Example 4

In this example, 200 email are received after business hours. The CCC chose to handle all email received during and after business hours linearly. The Linearly option divides all email received during and after business hours by the number of half hours in the work shift to determine the number of email handled during each half hour. Agents must handle all email received during business hours as they are received.

During the first half hour (Figure 4) the agents process 50 email received after business hours for the previous day and 10 additional email for a total of 50 email. The agents continue to handle 40 email received after business hours during each remaining half hour in the work shift. The agents also handle all email received during each half hour.

Figure 4 Handling Email: Example 4

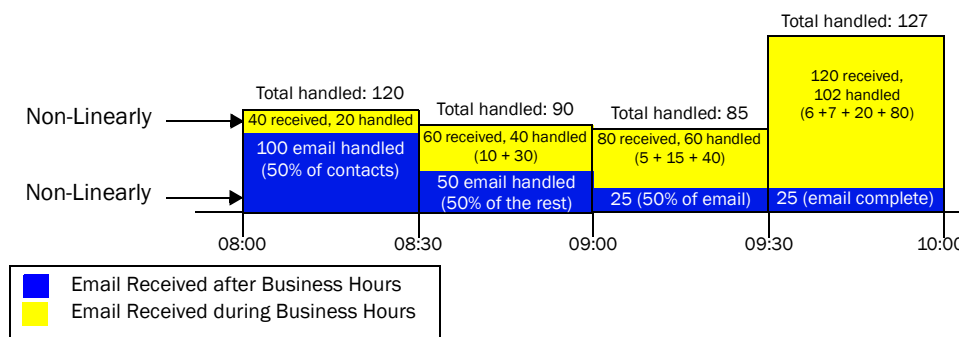


Example 5

In this example, 200 email are received after business hours. The CCC chose to handle all email received during and after business hours non-linearly. The Non-Linearly option schedules the agents to handle 50% of the email received after business hours and 50% of the email received during the first half hour and divides the number of email handled for each remaining half hour by 50%, until the last half hour in the work shift. During the last half hour, the agents are expected to complete the remaining email.

During the first half hour (Figure 5) the agents process 100 email received after business hours for the previous day and 20 additional email for a total of 120 email. The agents continue to handle 50% of email received after business hours during each remaining half hour. The agents also handle all 50% of email received during each half hour. During the last half hour in the work shift, the agents complete the remaining email.

Figure 5 Handling Email: Example 5

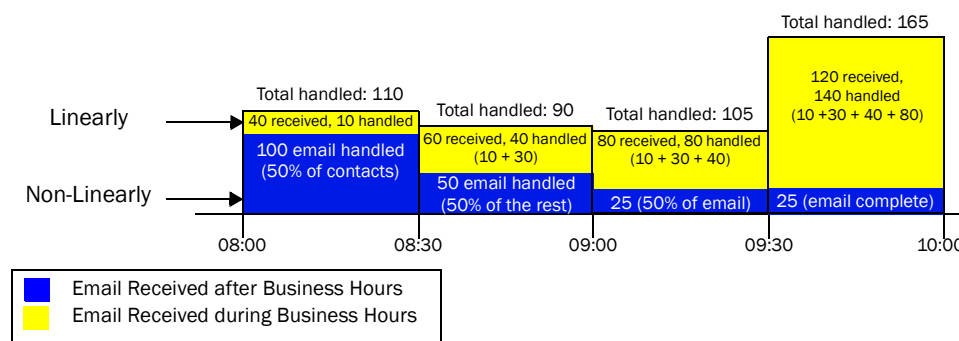


Example 6

In this example, 200 email are received after business hours. The CCC chose to handle all email received during business hours linearly and after business hours non-linearly. Linearly divides all email received during business hours by the number of half hours in the work shift to determine the number of email handled during each half hour. The Non-Linearly option schedules the agents to handle 50% of the email received after business hours and divides the number of email handled for each remaining half hour by 50%, until the last half hour in the work shift. During the last half hour in the work shift, the agents are expected to complete the remaining email.

During the first half hour (Figure 6) the agents process 100 email received after business hours for the previous day and 10 additional email for a total of 110 email. The agents continue to handle 50% of email received after business hours during each remaining half hour in the work shift. During the last half hour in the work shift, the agents complete the remaining email.

Figure 6 Handling Email: Example 6



Generating an Email Forecast without Trends

The following topic was omitted from page 161 in the *Workforce Management Administrator User Guide*.

Use this procedure to generate an email forecast without trends. You must generate a distribution before you generate a forecast. See “Generating a Call Distribution” on page 138 of the *Administrator User Guide* for more information on creating a distribution.

**Note**

Use this procedure if you do not have 12 to 15 months of historical data in WFM. Since historical data for email must be manually entered, it is assumed you have less than 12 months of historical data. WFM generates a forecast using a default trend value of one.

To generate a standard email forecast request without trends:

- Step 1** From the Navigation pane, choose Forecasting > Forecast Request. The Forecast Request pane displays standard forecast request options (Figure 7).

Figure 7

Forecast Request

- Step 2** Select the Email from the CSQ Type drop-down list. Calabrio WFM displays the CSQs associated with the email in the Select CSQs list.
- Step 3** Select the CSQs for which you want to generate an email forecast from the list Select CSQs list.
- Step 4** Select the start date for the forecast period from the Start Date field under Forecast Dates.
- Step 5** Select the end date for the forecast period from the End Date On field under Forecast Dates.

**Note**

You will need these start and end dates when you generate a schedule for this CSQ.

- Step 6** Select the Without Trends option.
- Step 7** Under Volume Projection Reference Period, enter the start date in the Start Date field and the end date in the End Date field.



Note Specify the same start and end dates for the reference period you used when you created the distribution scenario.

Step 8 To adjust average handling time, click Additional Parameters to display more parameters (Figure 8) and select one of the following options:

- **Distribution Call Handling Times** — If you changed the email handling time when you created the distribution, WFM uses the modified email handling time when generating the forecast. See “Creating a Call Distribution” on page 138 of the *Administrator User Guide* for more information.
- **Standard Handle Times** — WFM uses the email handling times specified when you created the CSQ. See “Creating a CSQ” on page 53 of the *Administrator User Guide* for more information.

Step 9 Enter the ratio by which you want the forecast adjusted in the Adjustment Factor field. WFM applies this adjustment independent of the trend calculation. If you do not want any special adjustment, set the adjustment factor to 1.0.



Note Unless you are in a growth period and you already know this growth percentage, we recommend using the default value (1.0) in this field and modify the Adjustment Factor field that appears in the Forecast Maintenance pane where you can better analyze the data (see “Editing Forecasts” on page 163 of the *Administrator User Guide*).

Step 10 Enter the date using the MM-DD-YYYY format (for example, 01-28-2008) and time using the HH:MM format (for example, 08:30) when you want to generate this forecast in the Execute Request Date field. When you select a date from the calendar, WFM automatically inserts the current time. The best practice is to generate the forecast during off peak hours.

Figure 8

Additional Parameters

The screenshot shows a dialog box titled "Additional Parameters". It contains the following fields and options:

- Average Call Handling Time:** Two radio button options: "Distribution Call Handling Times" (which is selected) and "Standard Handling Times".
- Adjustment Factor:** A text input field containing the value "1.0".
- Execute Request Date:** A text input field containing the value "01-17-2008 00:00".

See “Call Handling Estimation Methods” on page 151 of the *Administrator User Guide* for additional information.

Step 11 Click Service Levels Calculation to display more parameters (Figure 9) and complete the fields.

The Period column displays the schedule period in half hour intervals.

Figure 9 *Staffing levels calculation*

Period	Service %	Hours
00:00	100	4
00:30	100	4
01:00	100	4
01:30	100	4
02:00	100	4
02:30	100	4
03:00	100	4
03:30	100	4
04:00	100	4
04:30	100	4
05:00	100	4

Step 12 Enter the percentage of emails that must be answered within the time frame specified in the Service % field to match the service level objectives in your organization. The Service % is 100% by default.

For example, if you change 100% to 90% in the first period 00:00, all subsequent periods are changed to 90%. If you only want to change the periods from 00:00 to 02:00 to 90%, you must change the value for 02:30 to 100% and change all subsequent periods to 100%.

Step 13 Enter the number of hours in which all must be answered to match your service level objective in the Hours column. The default is four hours.

Step 14 Click Defer Handling of Email to display more parameters ([Figure 10](#)).



Note Defer Handling of Email only appears if you select a CSQ type of Email.

Figure 10 *Defer Handling of Email*

Defer Handling of email	
Received During Business Hours	No Deferring
Received Outside of Business Hours	No Deferring

Step 15 Select how you want to handle email received during business hours. Your options are:

- Linearly — If you choose this option, WFM divides all email received during business hours by the number of intervals in a work shift to determine the number of email handled during each half hour.
- No Deferring — If you choose this option, agents must handle all email received during the half hour when they are received.

- Non-Linearly — If you choose this option, WFM schedules the agents to handle 50% of the email received during the first half hour and divides the number of email handled for each remaining half hour by 50%, until the last half hour in the work shift. During the last half hour in the work shift, the agents are expected to complete the remaining email.

See ["Handling Email Options" on page 9](#) for more information on these options.

Step 16 Select how you want to handle email received after business hours. Your options are:

- Linearly — If you choose this option, WFM divides all email received after business hours by the number of half hours in a work shift to determine the number of email handled during each half hour.
- No Deferring — If you choose this option, agents must handle all email received after business hours during the first half hour of the next day.
- Non-Linearly — If you choose this option, WFM schedules the agents to handle 50% of the email received after business hours during the first half hour and divides the number of email handled for each remaining half hour by 50%, until the last half hour in the work shift. During the last half hour in the work shift, the agents are expected to complete the remaining email.
 - See ["Handling Email Options" on page 9](#) for more information on these options.


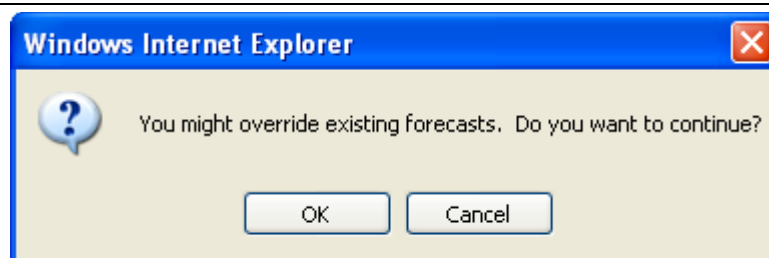
Step 17 Click  (Launch Request) to launch the forecast request. A Windows Internet Explorer dialog box appears ([Figure 11](#)).

Figure 11 *Windows Internet Explorer dialog box*



Step 18 Click OK to dismiss the dialog box.

WFM launches the forecast request on the server. The status of the forecast request appears on the Server Request List. See ["Managing Requests to the Server" on page 396](#) for more information.

WFM launches the email forecast request on the server. The status of the email forecast request appears on the Server Request List. See "[Managing Requests to the Server](#)" on page 396 for more information.

Displaying Historical Call Data

The following note was omitted from page 244 of the *Workforce Management Administrator User Guide*.

**Note**

WFM does not automatically capture calls that last over 1 hour, 44 minutes, and 59 seconds. If you want long calls included in the WFM database, you must manually capture the historical call data for that day. See "Capturing Historical Call Data" in the *Workforce Management Installation Guide for Cisco Unified Workforce Optimization*.

Displaying the Request Details

The following statement is incorrect on page 285 in the *Workforce Management Administrator User Guide*.

- 0 - Ended Abnormally — This status indicates the request failed.

The statement should read as follows.

- 9 - Ended Abnormally — This status indicates the request failed. This error occurs when a prerequisite is missing. For example: No forecast for the schedule launched. The reason for the failure appears on the Server Request Details pane. For more details, click the ID number in the ID column.

Displaying Compilation Requests

The following statement is incorrect on page 288 in the *Workforce Management Administrator User Guide*.

- 0 - Ended Abnormally — This status indicates the request failed.

The statement should read as follows.

- 9 - Ended Abnormally — This status indicates the request failed. This error occurs when a prerequisite is missing. For example, no forecast for the schedule launched. The reason for the failure appears on the Compilation Request Details pane. For more details, click the number in the Number column.

Scheduling Multimedia Activities

The following information replaces the text on pages 295-299.

Introduction

This chapter explains how to schedule agents to support email and chat services.

Scheduling Agents to Respond to Email

You can create a CSQ mapping for responding to email. Then create a CSQ with the CSQ Type of email. After you create this CSQ, you can assign agents to the CSQ mapping and schedule agents to respond to email.

To schedule agents to respond to email:

1. Create a CSQ mapping for responding to email (see “Creating a CSQ Mapping” on page 47 for instructions).
2. Create a CSQ with a CSQ Type of Email (see “Creating a CSQ” on page 53 for instructions).



Note You can create a CSQ for each type of email you want your agents to handle (for example, sales or IT help desk email).

3. Assign the CSQ to a CSQ mapping (see “Assigning CSQs to CSQ Mapping” on page 51 for instructions).
4. Enter the historical email volume for the CSQ (see “Entering Historical Data Manually” on page 252 for instructions).
5. Create a distribution by specifying a start and end date from your historical reference period. (see “Generating a Call Distribution” on page 138 and “Editing a Call Distribution” on page 141 for instructions).
6. Generate a forecast without trends for the CSQ using reference dates for which you have historical data (see “[Generating an Email Forecast without Trends](#)” for instructions).
7. Create work shifts for the agents to handle email (see “Creating a Work Shift” on page 103 for instructions).
8. Assign the work shift to an agent (see “Assigning Work Shifts” on page 120 for instructions).
9. Create a schedule for the agents to handle email (see “Creating a Schedule” on page 185 for instructions).

Scheduling Agents to Support Chat Services

Use the following method to schedule agents to support chat services:

To schedule agents to support chat services:

1. Create a CSQ mapping for supporting chat (see “Creating a CSQ Mapping” on page 47 for instructions).
2. Create a CSQ with a CSQ Type of Calls (see “Creating a CSQ” on page 53 for instructions).



Note Chat, like calls, are handled in real-time.



Note You can create an CSQ for each type of chat service you want your agents to handle (for example, sales or IT help desk chat services).

3. Assign the CSQ to a CSQ mapping (see “Assigning CSQs to CSQ Mapping” on page 51 for instructions).
4. Enter the historical chat volume for the CSQ (see “Entering Historical Data Manually” on page 252 for instructions).
5. Create a distribution by specifying a start and end date from your historical reference period. (see “Generating a Call Distribution” on page 138 and “Editing a Call Distribution” on page 141 for instructions).

6. Generate a forecast for the CSQ using reference dates for which you have historical data (see “Generating a Forecast with Trends” on page 151 or “Generating a Forecast without Trends” on page 156 for instructions).
7. Create work shifts for the agents to handle chat (see “Creating a Work Shift” on page 103 for instructions).
8. Assign the work shift to a agent (see “Assigning Work Shifts” on page 120 for instructions).
9. Create a schedule for the agents to handle chat (see “Creating a Schedule” on page 185 for instructions).

Searching for an Item in a Table

The note on page 24 is revised to read as follows:



Note

The search fields are NOT case sensitive.

Obtaining Documentation, Obtaining Support, and Security Guidelines

For information on obtaining documentation, obtaining support, security guidelines, and also recommended aliases and general Cisco documents, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at:

<http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html>

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