Cisco Unified Workforce Optimization

Workforce Management 8.2 Agent User Guide
October 31, 2007

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

Contents

Contents

Contents

Contents

Using My Page

1

Introduction

This document describes how to use the Workforce Management (WFM) Agent Interface. The WFM agent interface allows you to:

- Manage your inbox
- Trade schedules with another agent
- Display your schedule
- Manage your bulletin board
- Offer schedules for other agents to accept
- Enter requests for time off (for example, vacations and medical appointments)
- Display your productivity indicators
- Display your statistics and compare them against your team's statistics

Definitions

This document uses the following acronyms:

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

Intended Audience

This document is written for call center agents who use the WFM agent interface to view their schedules and performance indicators.

WFM Documentation

The following documents contain additional information about WFM:

- *Workforce Management Administrator User Guide for Cisco Unified Workforce Optimization*
- *Workforce Management Installation Guide for Cisco Unified Workforce Optimization*
- *Workforce Management Service Information Manual for Cisco Unified Workforce Optimization*
- *Workforce Management Release Notes for Cisco Unified Workforce Optimization*

Getting Started

2

Introduction

This chapter explains how to:

- Log into the WFM Agent Interface
- Navigate within the different menus and panes
- Set preferences
- Use icons in WFM

Logging into Workforce Management

The following procedure describes how to log into Workforce Management.

To log into Workforce Management:

1. Enter the following URL in your web browser, where *wfm* is either the name or IP address of the server on which WFM installed.

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

   NOTE: The website address is case sensitive.

   The Workforce Management login window appears (Figure 1).

Figure 1. Workforce Management login window

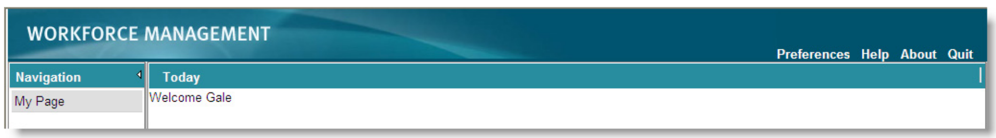
2. Enter your Workforce Management username and password.

NOTE: Your Workforce Management username and password is your Active Directory username and password. The Active Directory username and password is the username and password you use to log into your PC. If your company does not use Active Directory, ask your system administrator for your WFM username and password.

The username is not case sensitive and the password is case sensitive.

3. Click GO or press the Enter key to log into Workforce Management. The Workforce Management window appears (Figure 2).

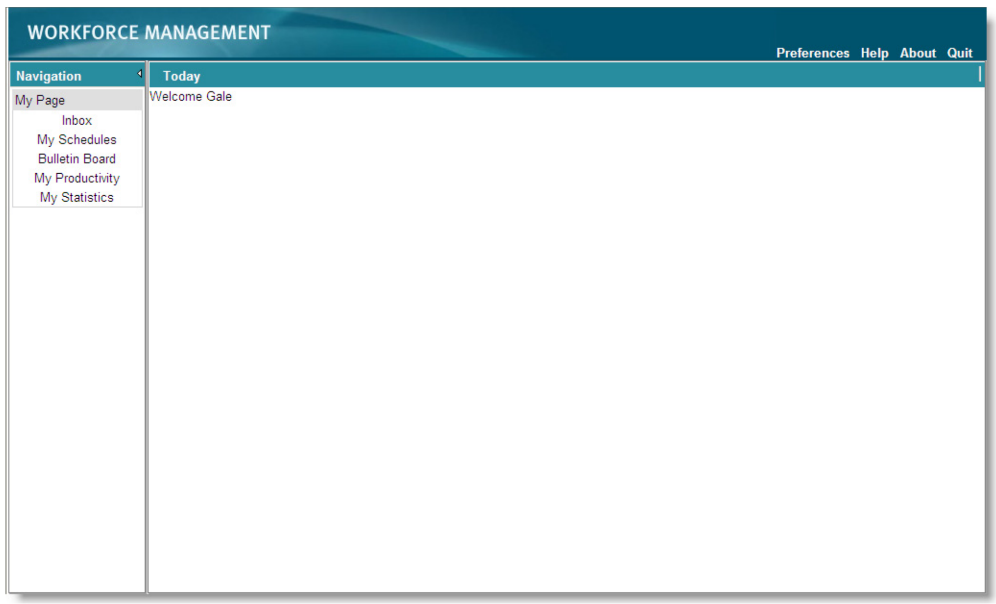
Figure 2. Workforce Management window



The Workforce Management Agent Interface

The Workforce Management Agent interface (see Figure 3) has two panes.The left pane is the Navigation pane. The right pane displays the task you select in the left pane.

Figure 3. Workforce Management Agent interface



This topic covers the following information:

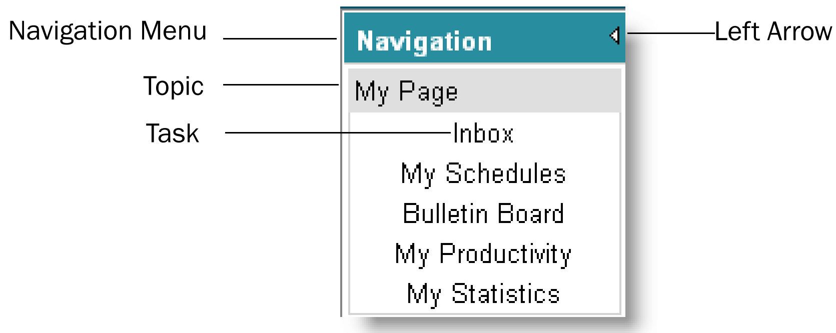
- "Using the Navigation Pane" on page 15
- "Sorting a Column in a Table" on page 15
- "Viewing a Large Table with Many Rows" on page 17
- "Description of Icons" on page 17
- "Description of Navigation Buttons" on page 18

Using the Navigation Pane

Use these mouse actions to use the Navigation pane.

- Click My Page in the Navigation pane to expand or collapse the menu (Figure 4).

Figure 4. Navigation menu



- Click a task to display the associated fields in the right pane.
- To hide the Navigation pane, click ◁ (left arrow).
- To display the Navigation pane, click ▶ (right arrow).

Sorting a Column in a Table

Data that is presented in tabular form (see Figure 5) can be sorted based on the contents of a single column in the table. The sort can be ascending or descending.

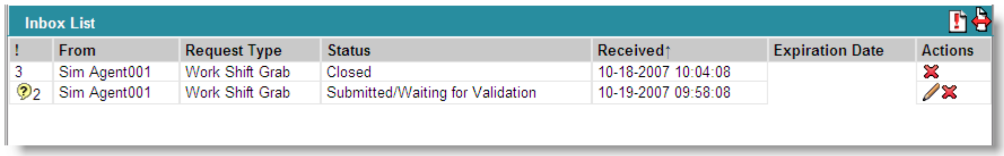
The small arrow at the right of the primary sort column header displays the direction of the sort, ascending or descending.

> NOTE: Numbers are sorted in alphanumeric order without accounting for the actual value of the number. For example: 1 appears after 0999, 3 appears after 299, 31 appears after 3, 34 appears after 3104 and so on.

To sort a table by one column:

- Click the column header. Click again to reverse the sort order.

Figure 5. Example of a sortable table



Inbox List

!	From	Request Type	Status	Received↑	Expiration Date	Actions
3	Sim Agent001	Work Shift Grab	Closed	10-18-2007 10:04:08		
2	Sim Agent001	Work Shift Grab	Submitted/Waiting for Validation	10-19-2007 09:58:08		

Searching for an Item in a Table

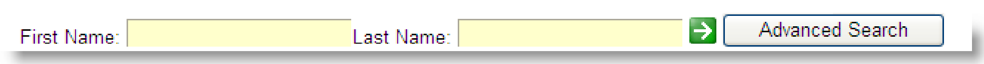
If a table contains many items, you can use (Search), to locate an item more quickly. Workforce Management provides two types of searches:

- Basic
- Advanced

To perform a search:

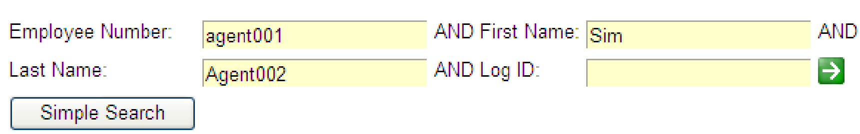
1. Click (Search). The basic search fields appear (Figure 6).

Figure 6. Basic search fields



2. You have two options for performing a search:
   - To perform a simple search, enter the user's first name or last name or both first and last names in the fields.
   - To perform an advanced search, click Advanced Search (Figure 7) and enter the appropriate text in the fields.

Figure 7. Advanced search fields



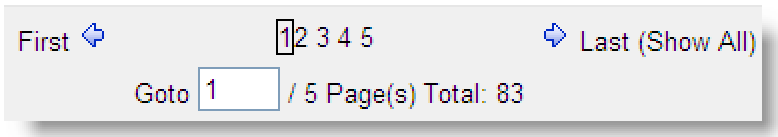
3. Click (Go). The results appear in the list.

Viewing a Large Table with Many Rows

WFM frequently displays tables. Some tables have more rows than can be viewed on a pane. When a table is large, options appear at the bottom of the pane (Figure 8) that allow you to move quickly through the table.

You view tables either in scrolling or paging mode. Paging is the default mode.

Figure 8. Paging mode



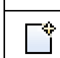
Use these mouse actions to view a large table.

- 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. Workforce Management display all items in the list. Use the scroll bar on the right to view all items.
- To display items on multiple pages, click Paging Mode at the bottom of the table. The Paging Mode pane appears (see Figure 8).
- To go directly to a page, enter the page number in the Goto field and click Goto, or click the page number between the arrows.
- To move forward or backward in 5 pages at a time, use (Previous Group) or (Next Group). For example, if you are currently viewing page 1 and click (Next Group), WFM displays page 6.

  NOTE: If there are less than 5 pages of items in the table, the arrow buttons will not work.

Description of Icons

The following table describes the most frequently used actions and their icons in WFM.

Icon	Actions	Description
	Hide	Hide the Navigation pane.
	Display	Display the Navigation pane.
	New	Create a new file (user, agent, CSQ mapping, etc.).
	Save	Save the newly created or modified files.

Icon	Actions	Description
	Delete	Delete the selected files.
	Launch a request	Generate a processing request to the server.
	Next Group	Move forward 5 pages at a time.
	Previous Group	Move backward 5 pages at a time.
	Back	Return to previous pane.
	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.

Description of Navigation Buttons

The following table describes the most frequently used navigation buttons in WFM.

Button	Description
Preferences	Display the My preferences pane.
Help	Display help.
About	Display the WFM version in a separate dialog box. **NOTE:** Turn off your pop-up blocker to view this information.
Quit	End your session.

Setting Display Preferences

Use the procedures in this section to change your display preferences. This topic covers the following information:

- "Displaying the Date Format" on page 19
- "Customizing a Dashboard" on page 19
- "Selecting Schedule Display Parameters" on page 22
- "Changing Your Password" on page 23

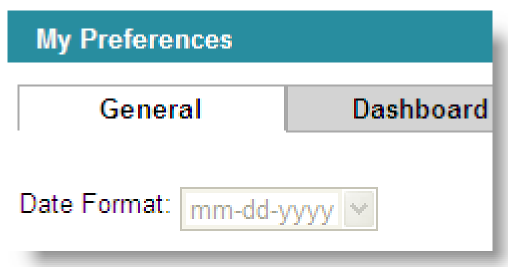
Displaying the Date Format

Use this procedure to select the date format that you want to appear on Workforce Management panes and reports.

To select a date format:

- Click **Preferences.** The General tab on the My preferences pane appears (Figure 9).

Figure 9. My Preferences: General tab



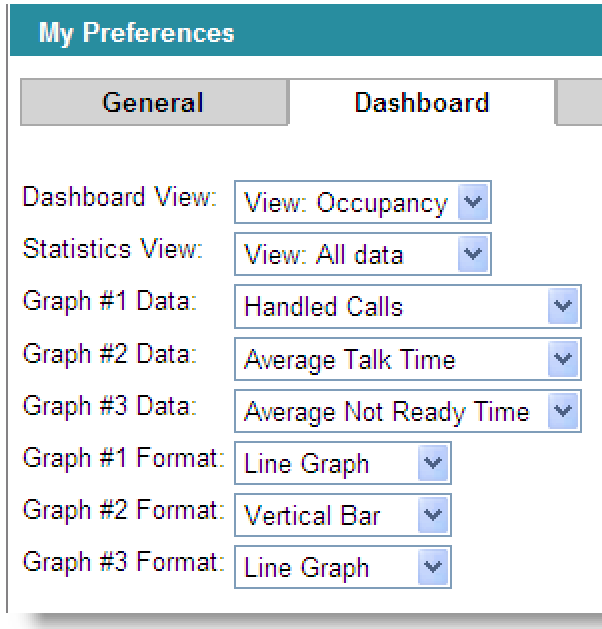
Customizing a Dashboard

Use this procedure to select the views and formats that you want to appear on My Productivity and My Statistics dashboard.

To customize a dashboard

1. From the My preferences pane, click the **Dashboard** tab. The Dashboard tab on the My preferences pane appears (Figure 10).

Figure 10. My Preferences: Dashboard tab



2. Complete the fields.

Field Name	Description
Dashboard View	Select the view you want to display on your My Productivity dashboard display. The available options are: • View: All data — Displays all call and occupancy information. • View: Calls — Displays call information • View: Occupancy — Displays occupancy information.
Statistics View	Select the view you want to display on your My Statistics dashboard. The available options are: • View: All data — Displays all call and occupancy statistics. • View: Calls — Displays call statistics • View: Occupancy — Displays occupancy statistics.

Field Name	Description
Graph #1, #2 and #3 Data	Select the data to be graphed for each display in the dashboard. You can specify up to three graphs. The available options are: • Average Calls x Hour • Average Absence Time • Average Not Ready Time • Average On Hold Time • Average Processing Time • Average Talk Time • Average Time Waiting • Handled Calls • $ in Session • Incoming Calls • % Busy • Outgoing Calls • % Processing • Total Absence Time • Total Time in Service • Total Time in Session • Total Time Not Ready • Total Time busy • Total Time on Hold • Total Processing Time • Total Talk Time • Total Wait Time • Transferred Calls
Graph #1, #2 and #3 Format	Select a format for the graph. The available options are: • Vertical Bar • Horizontal Bar • Line Graph

3. Click (Save) to save your changes.

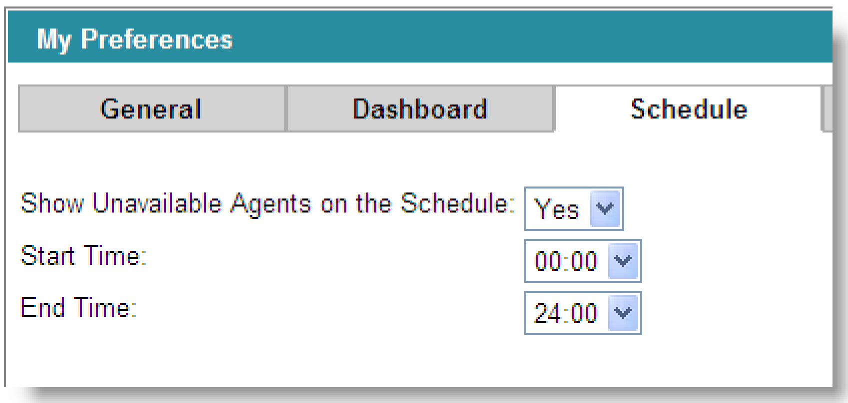
Selecting Schedule Display Parameters

Use this procedure to select the information that you want to appear on your schedule.

To select schedule display parameters:

1. From the My Preferences pane, click the **Schedule** tab. The Schedule tab on the My preferences pane appears (Figure 11).

Figure 11. My Preferences: Schedule tab



2. Choose one of the following options from the Show Unavailable Agents on the Schedule drop down list.
   - Yes — Displays unavailable agents on the schedule.
   - No — Hides unavailable agents on the schedule.
3. Select the time when you want the schedule display to start from the Start Time field.
4. Select the time when you want the schedule display to end from the End Time field.

   NOTE: 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.

5. Click (Save) to save your changes.

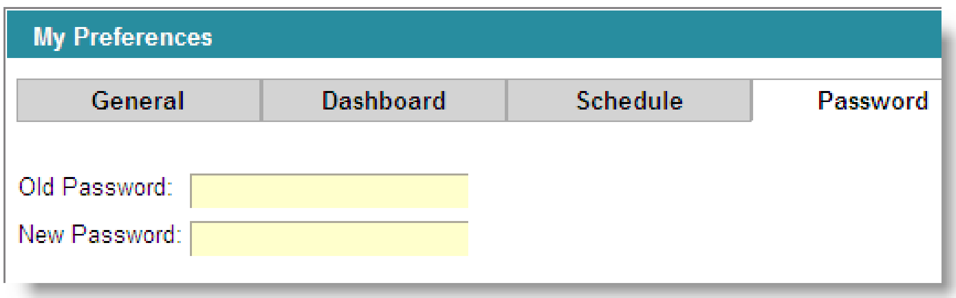
Changing Your Password

You might be asked to change your password when you first log into Workforce Management or periodically. Use this procedure to change the password you use when logging on to Workforce Management.

To change your password:

1. From the My Preferences pane, click the Password tab. The Password tab on the My preferences pane appears (Figure 12).

Figure 12. My Preferences: Password tab



2. Enter your current password in the Old Password field.

   NOTE: Do not use these fields to change your Active Directory password. If you do not know if your password is an Active Directory password, ask your system administrator.

3. Enter your new password in the New Password field.
4. Click  (Save) to save your changes.

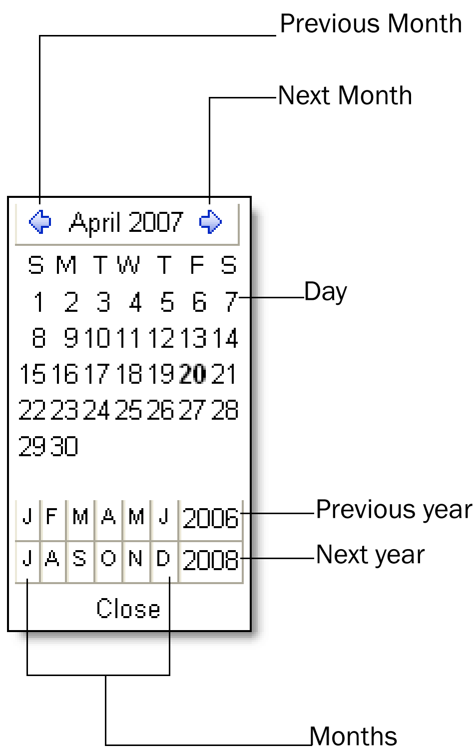
Entering Dates

There are many instances in Workforce Management where you need to enter a date.

To enter a date in a field:

1. Click a date field in the pane. The Workforce Management calendar appears (Figure 13).

Figure 13. Workforce Management calendar



2. To enter a date, you have the following options:

   - If there is a date field, enter the date directly in the date field using the format displayed in the General tab for the My Preferences pane. See "Displaying the Date Format" on page 19 for more information.

- Select the year, month and day from the Workforce Management calendar.
  - To select a previous or future year, click the previous or next year future to the abbreviated months. When you select a year, it becomes the current year on the calendar.
  - To select a specific month, click the letter associated with the month. The letters are displayed in the order the months occur (for example, J — January, J — February, M — March, and so on).
  - To select the previous or next month, use the arrows. Click the (right arrow) to display the next month or click (left arrow) to display the previous month.
  - To select a day within a month, click the number associated with the day in the calendar. The date appears in the date field.

3. Click Close to dismiss the calendar.

Managing Your Inbox

3

Introduction

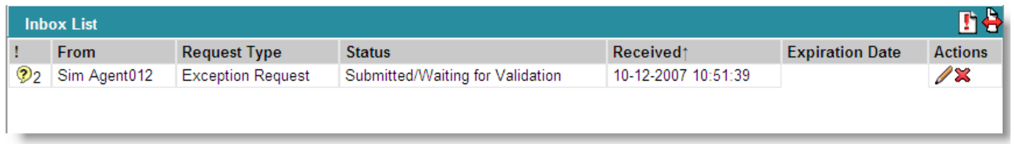
The Inbox List displays all messages that are sent to you. It allows you to:

- Review messages
- Trade schedules with another agent
- Offer schedules on the bulletin board for other agents to accept
- Accept trade offers from other agents
- Enter requests for time off (for example, vacations and medical appointments)
- Modify and delete requests

Inbox List

The Inbox List (see Figure 14) displays all messages sent to you. Use this pane to manage your messages. To access the Inbox List, choose **My Page** > **Inbox**.

Figure 14. Inbox List



The message icons and columns are described below.

Field Name	Description
!	An icon and a number that has a specific meaning related to the status of the message. The icons and numbers are described as follows. • 1 — A request is in progress that requires you to perform an action. • 2 — A request is in progress. No action is required. • 3 — A request was rejected or closed.
From	Displays the name of the agent who sent the request.
Request Type	Displays the type of request. The following request types are available: • Exception request — Indicates an agent is requesting an absence and wants another agent to fill in. • Work Shift Grab — Indicates an agent is requesting a schedule trade with another agent. Click a request in the Request Type column to see the details for the request.
Status	Displays the status of the request. The possible values are: • Closed — A request is resolved. • Submitted/Waiting for Validation — The request is open and waiting for a response.
Received	Displays the date and time when the message was received or created.
Expiration date	Displays the expiration date.

Field Name	Description
Actions	Actions you can perform after you receive a schedule offer or request to trade. The possible actions are: • Click  to edit an existing request. See "Editing an Exception Request" on page 31 or "Editing a Schedule Trade Request" on page 34 for additional information. • Click  to delete the request. See "Deleting a Request" on page 36 for more information. NOTE: You can only perform these actions if you initiated the request.
	Create a new exception request.
	Create a new schedule swap request.

Creating an Exception Request

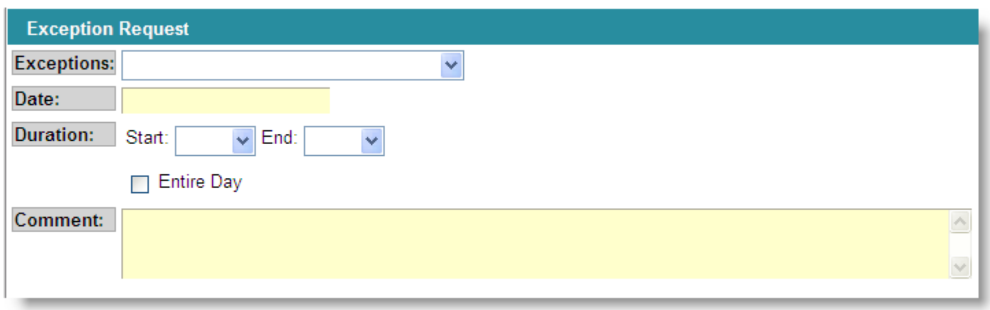
You can create an exception request whenever you need to ask for time off. The exception request is sent to your supervisor for approval.

An exception is a non-routine activity that prevent agents from answering contacts. These non-routine activities do not occur each work shift. They can be activities that are external to the contact center efforts, such as illness and vacation, or internal, such as training and department meetings.

To create an exception request:

1. From the Inbox List, click (New Exception Request) in the toolbar. The Exception Request pane appears (Figure 15).

Figure 15. Exception Request



2. Select the exception that most closely applies to your situation from the Exceptions drop down list.

   NOTE: If the list of available exceptions do not apply to your situation, talk to your supervisor.

3. Enter the date of your exception in the Date field. See "Entering Dates" on page 24 for more information.
4. Enter the start time and end time for your exception in the Start and End fields. If the duration is an entire day, select the Entire Day check box.
5. If necessary, enter the reason why you are requesting this exception in the Comment field.
6. Click (Save) to create your exception request.
7. Click (Back) to return to the Inbox List pane.

   Your request is added to the list and sent to your supervisor for approval. The status on your exception request displays the following message:

   `Submitted/Waiting for validation.`

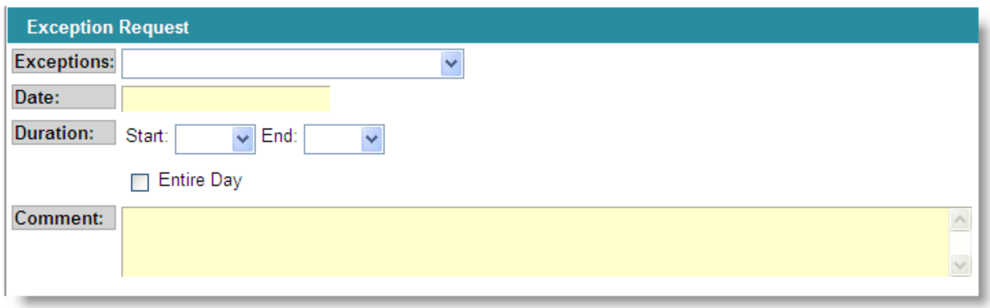
Editing an Exception Request

You can edit an exception request you created at any time prior to approval.

To edit an exception request:

1. From the Inbox List, click (Edit) in the Action column next to the exception request you want to edit. The Exception Request pane appears (Figure 16).

Figure 16. Exception Request



2. Complete the fields. The fields are described in "Creating an Exception Request" on page 30.
3. Click (Save) to save your exception request.
4. Click (Back) to return to the Inbox List pane.

   Your request is updated on the list and sent to your supervisor for approval. The status on you exception displays the following message:

   `Submitted/Waiting for validation.`

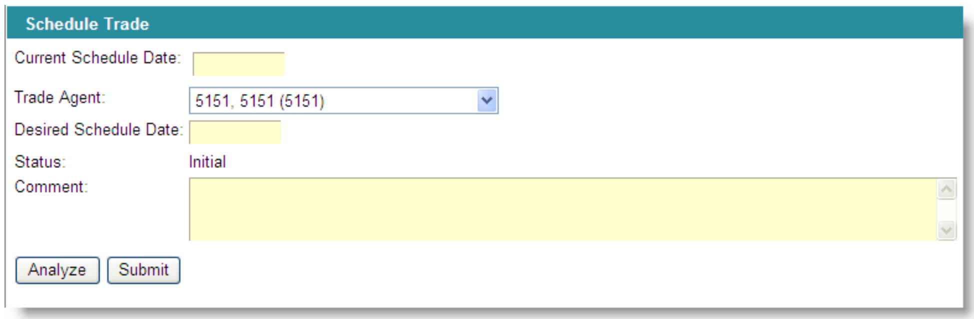
Creating a Schedule Trade Request

Use this procedure when you want to trade a day in your schedule with a day from another agent's schedule.

To create a schedule trade request:

1. From the Inbox List, click  (New Schedule Swap Request) in the toolbar. The Schedule Trade pane appears (Figure 17).

Figure 17. Schedule Trade

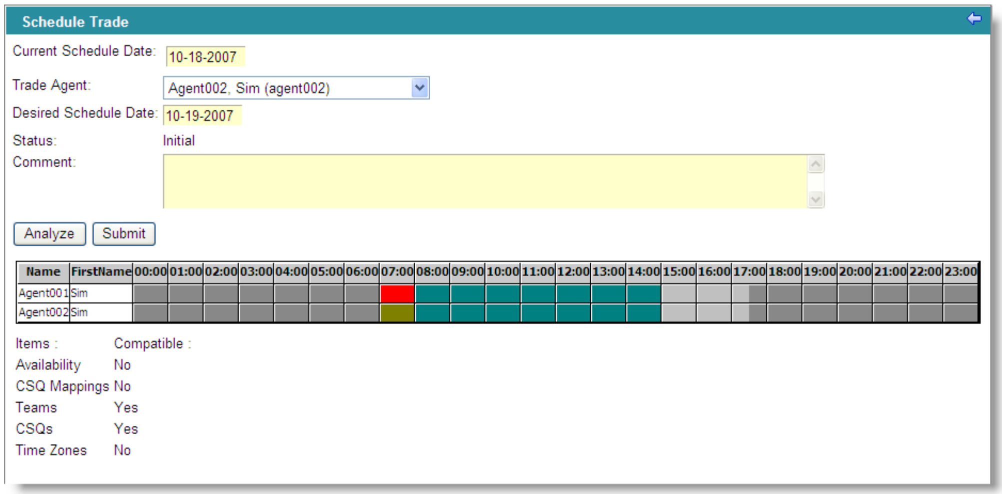


2. Enter the date you want to trade in the Current Schedule Date field. See "Entering Dates" on page 24 for more information.
3. Select the agent with whom you want to trade your schedule from the Trade Agent drop down list.
4. Enter the date you want from the other agent's schedule in the Desired Schedule Date field.

   You should know which date you want to trade when you enter a date in this field. If you have any doubts about the dates you want to trade, use the Analyze button.
5. Enter the reason why you are requesting this trade in the Comment field.
6. Click Analyze to display both schedules (Figure 18).

Generally, a Yes in the Compatibility column for CSQs or Team indicates this is a valid trade request.

Figure 18. Schedule Trade: Analyze



7. Click Submit to send your schedule trade request to the agent with whom you want to trade.

   Your request is added to the list and sent to the agent for approval. The status on your schedule trade request displays the following message:

   `Submitted/Waiting for Validation`

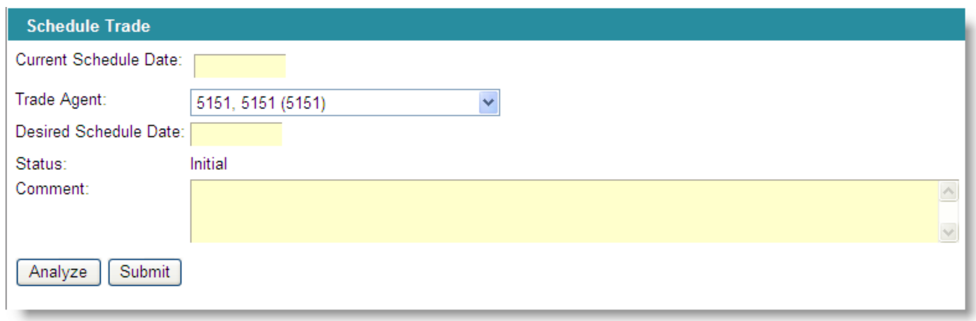
Editing a Schedule Trade Request

You can edit a schedule trade request that you created at any time prior to approval.

To edit a schedule trade request:

1. From the Inbox List, click (Edit) in the Action column next to the schedule trade request you want to edit. The Schedule Trade pane appears (Figure 19).

Figure 19. Schedule trade

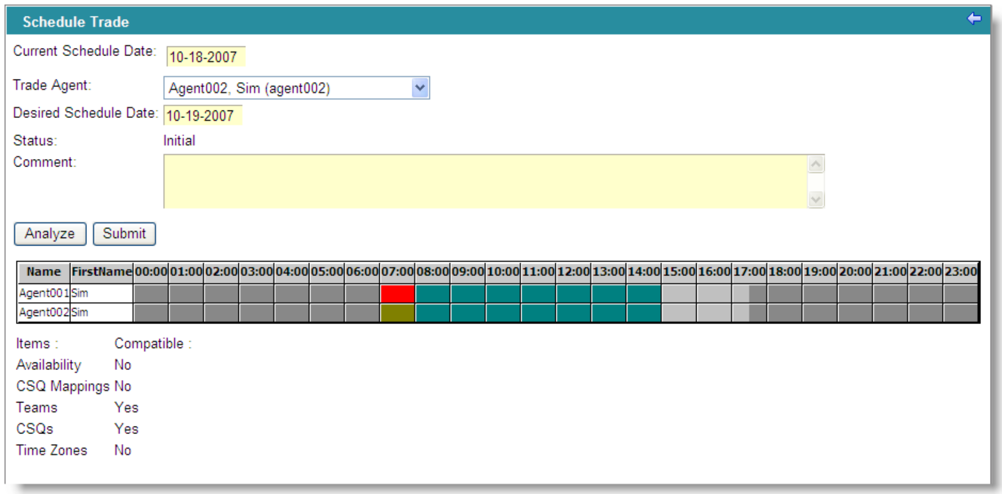


2. Enter the date you want to trade in the Source field. See "Entering Dates" on page 24 for more information.
3. Select the agent with whom you want to trade your schedule from the With drop down list.
4. Enter the date you want from the other agent's schedule in the Schedule field.

   You should know which date you want to trade when you enter a date in this field. If you have any doubts about the dates you want to trade, use the Analyze button.
5. Enter the reason why you are requesting this trade in the Comment field.
6. Click Analyze to display both schedules (Figure 20).

Generally, a Yes in the Compatibility column for CSQs or Team indicates this is a valid trade request.

Figure 20. Schedule trade: Analyze



7. Click Submit to send your schedule trade request to the agent with whom you want to trade.

   Your request is updated and sent to the agent for approval. The status on schedule trade request displays the following message:

   `Submitted/Waiting for Validation`

Deleting a Request

You can delete a request that you created at any time.

To delete a request:

1. From the Inbox List, click (Delete) next to the request you want to delete.

   The request is removed from the Inbox List. Workforce Management displays the following message:

   `Delete done.`

   The request no longer appears in the Inbox List.

Displaying Your Schedules

4

Introduction

Use the My Schedules pane to display your schedules by week or by month with a summary, detailed or list view. You can also display your schedules for a selected day. The number of past and future schedules displayed by WFM is set by the WFM administrator.

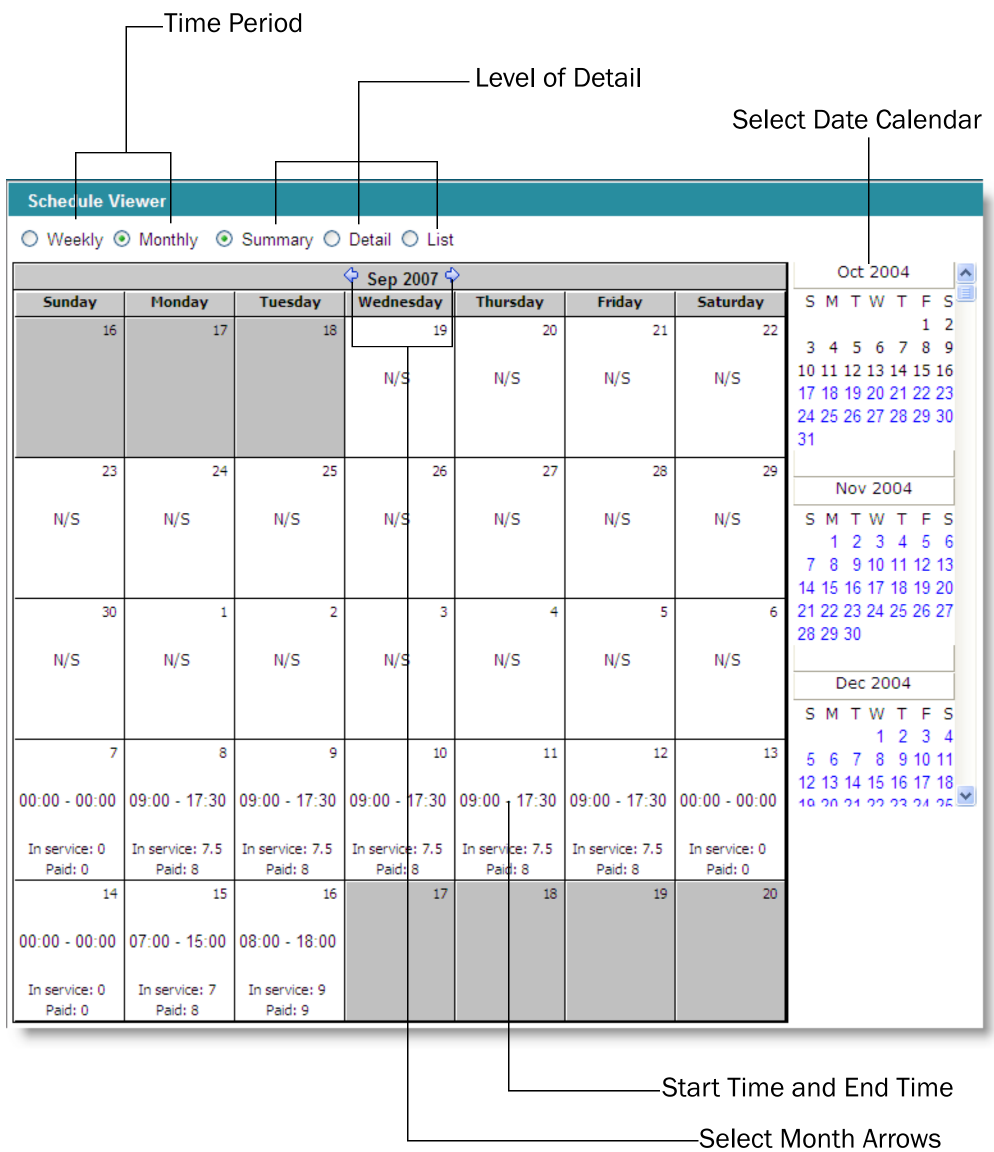
Schedule Viewer

The Schedule Viewer (see Figure 21) provides an at-a-glance overview of your schedule. To access the Schedule Viewer pane, choose My Page > My Schedules.

Use the Schedule Viewer to display your schedules by week or by month with a summary, detailed or list view. You can also display your schedules for a selected day. The number of past and future schedules displayed by WFM is set by the WFM administrator.

WFM displays a monthly summary schedule by default. The first date displayed on the calendar is today's date.

Figure 21. Schedule Viewer



Time Period

You can specify one of the following time period options in the Schedule Viewer:

- Weekly — Displays one week in the Schedule Viewer. By default, WFM displays the current week.
- Monthly — Displays a month in the Schedule Viewer. By default, WFM displays the month starting with the current day. Monthly is selected by default.

Level of Detail

After you specify the time period, you can select one of the following options in Schedule Viewer:

- Summary — Displays the start and end times for each scheduled day, the number of hours in service and the number of hours paid.
- Detail — Displays the schedule detail by interval for each day.
- List — Displays the start and end times for each break, lunch, in service, exception and work condition.

Select Month Arrows

You can choose the month to be displayed in the Schedule viewer. To choose a month, click the arrows on either side of the month and date at the top of the calender. Click (Previous) to display the previous month or (Next) to display the next month.

NOTE: When displaying schedules by month, WFM always displays 4 full weeks.

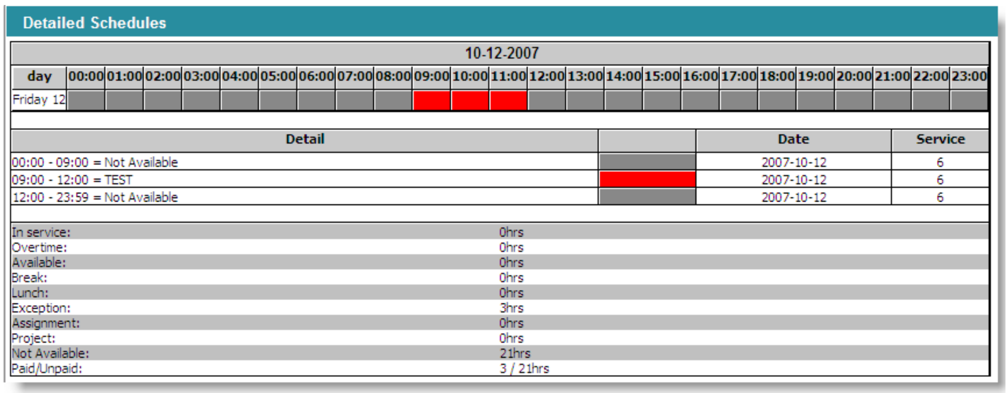
Select Date Calendar

You can select the first date displayed in the Schedule Viewer from the Select Date Calendar. These are the dates for which you are scheduled. Selectable dates are highlighted in blue in the Select Date Calendar. The current date is highlighted in red in the Select Date Calendar.

Start Time and End Time

To view detailed schedule information for a specific day, click the start and end time for the day displayed in the monthly or weekly calendar. For example, click 09:00 - 17:20 on Wednesday, August 8th to display the Detailed Schedules pane (Figure 22).

Figure 22. Detailed Schedules



The fields are described below.

Field Name	Description
Date	Displays the date.
Day	Displays the day of the week.
Detail	Displays the scheduled in detail.
Service	Displays the number associated with the service.
In service	Displays the number of hours in which an agent is scheduled to be logged in and ready to handle calls.
Overtime	Displays the number of hours in which the agent works over time.
Available	Displays the number of hours when the agent is not scheduled, but the agent’s work shift allows the agent to be scheduled.
Break	Displays time allowed when the agent is not handling calls because of a break.
Lunch	Displays the time allowed when the agent is not handling calls because of lunch.
Exception	Displays the time allowed when the agent is not handling calls because of an exception.

Field Name	Description
Not available	Displays the number of hours when the agent is not scheduled for the CSQ and the agent’s work shift does not allow the agent to be scheduled.
Paid/Unpaid	Displays the number hours for which the agent is paid and not paid.

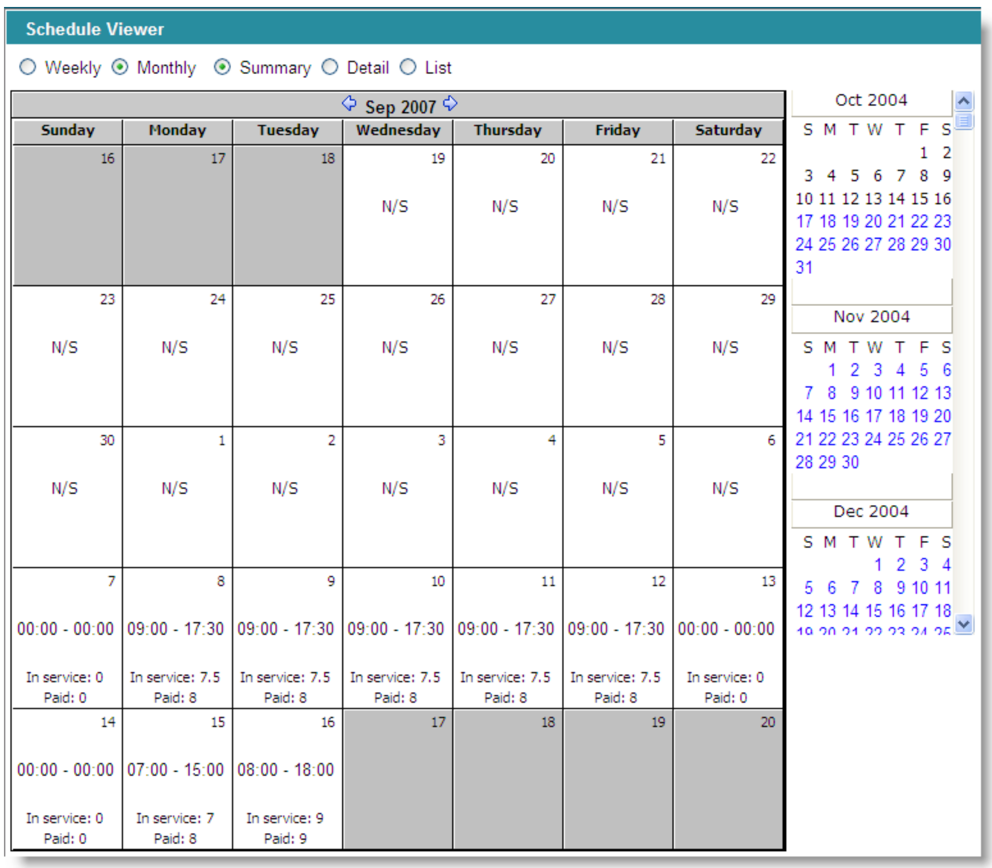
Displaying Schedules by Month and Summary

Use this procedure to see a summary of your schedule for an entire month.

To display schedules by month and summary:

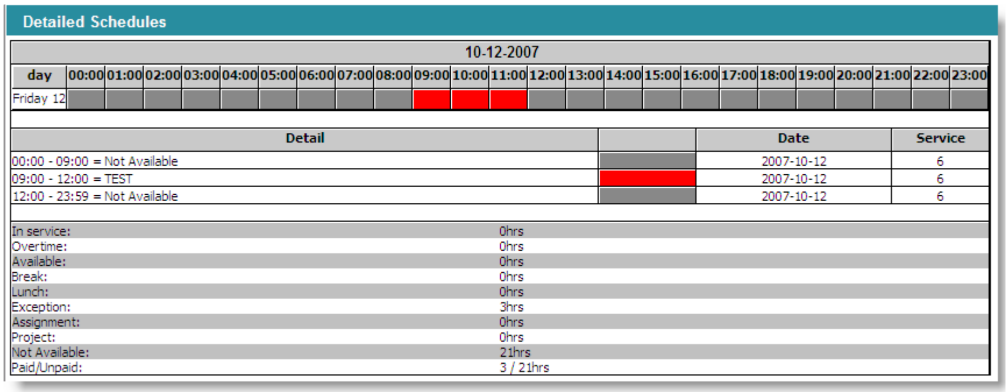
1. From the Schedule Viewer, choose Monthly and Summary. The calendar appears by month and summary (Figure 23).

Figure 23. Schedule Viewer by month and summary



2. To view detailed schedule information for a specific day, click the start and end time for day displayed in the monthly calendar. The Detailed Schedules pane appears (Figure 24).

Figure 24. **Detailed Schedules**



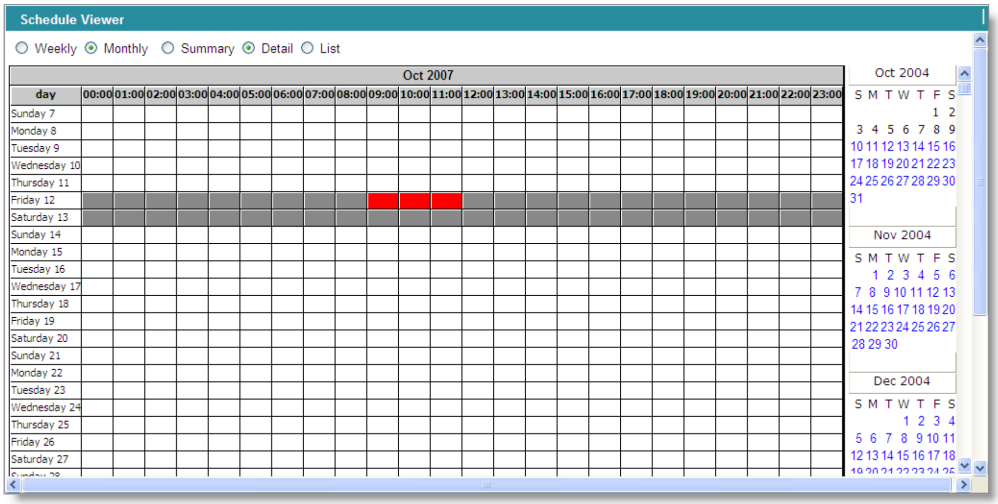
Displaying Schedules by Month and Detail

Use this procedure to see the schedule detail by interval for each day of the month.

To display schedules by month and detail:

- From the Schedule Viewer, choose Monthly and Detail. The calendar appears by month and detail (Figure 25).

Figure 25. Schedule Viewer by month and detail



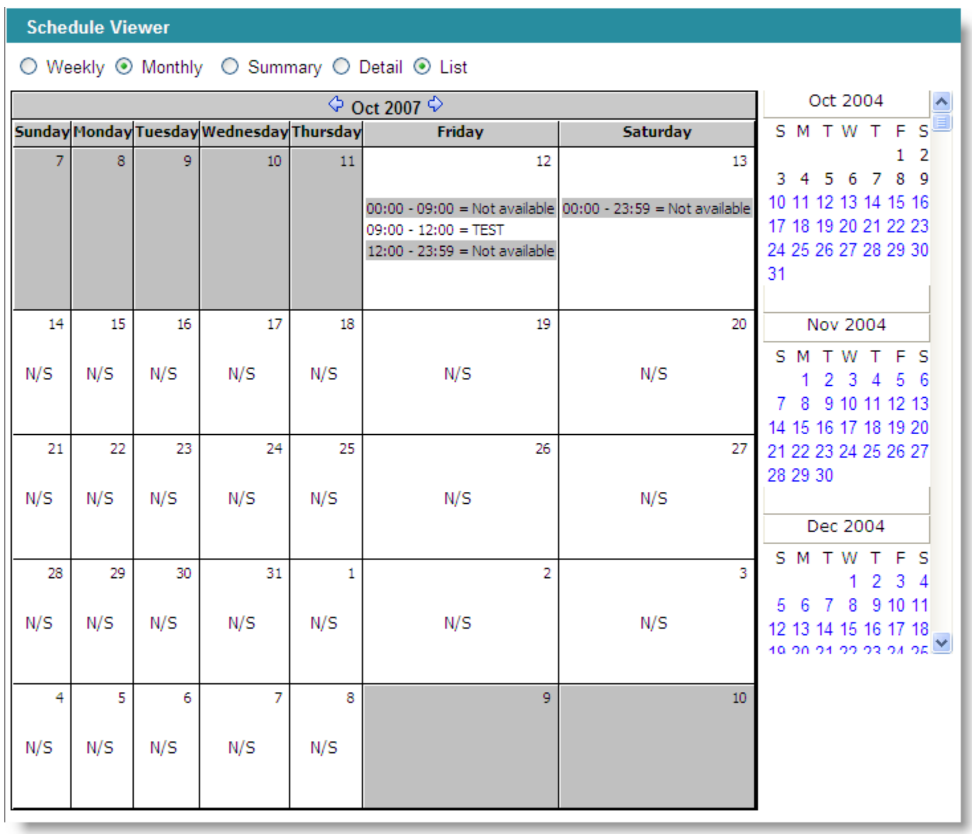
Displaying Schedules by Month and List

Use this procedure to see the start and end times for each break, lunch, in service, exception and work condition that appears in your schedule for each day of the month.

To display schedules by month and list:

- From the Schedule Viewer, choose Monthly and List. The calendar appears by month and list (Figure 26).

Figure 26. Schedule viewer by month and list



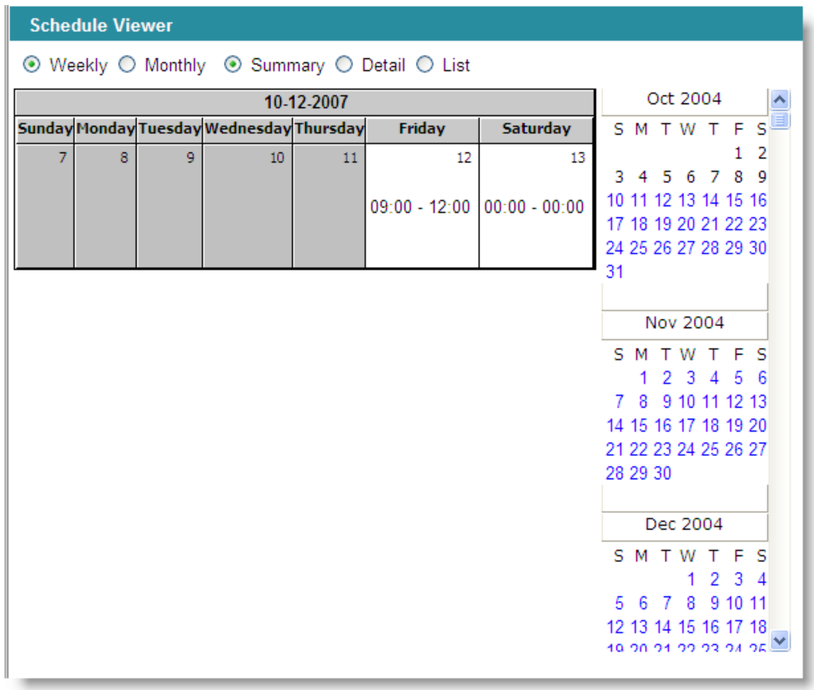
Displaying Schedules by Week and Summary

Use this procedure to see a summary of your schedule for an entire week.

To display schedules by week and summary:

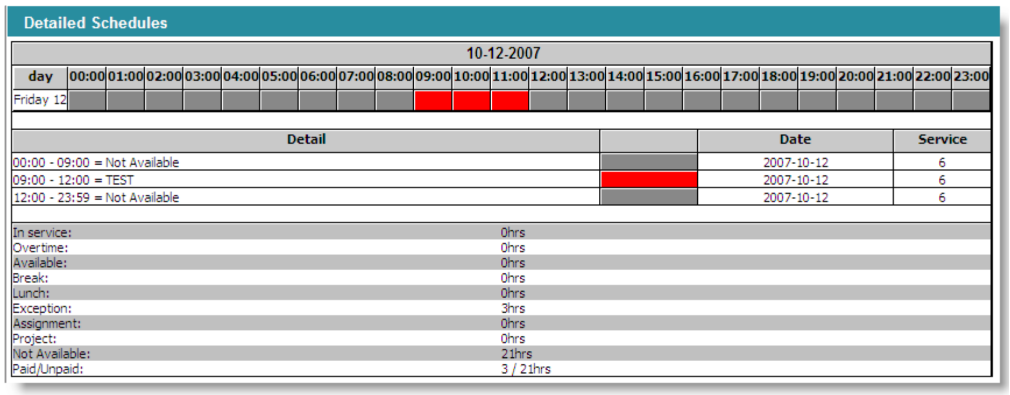
1. From the Schedule Viewer, choose Weekly and Summary. The calendar appears by week and summary (Figure 27).

Figure 27. Schedule Viewer by week and summary



2. To view detailed schedule information for a specific day, click the start and end time for day displayed in the weekly calendar. The Detailed Schedules pane appears (Figure 28).

Figure 28. Detailed Schedules



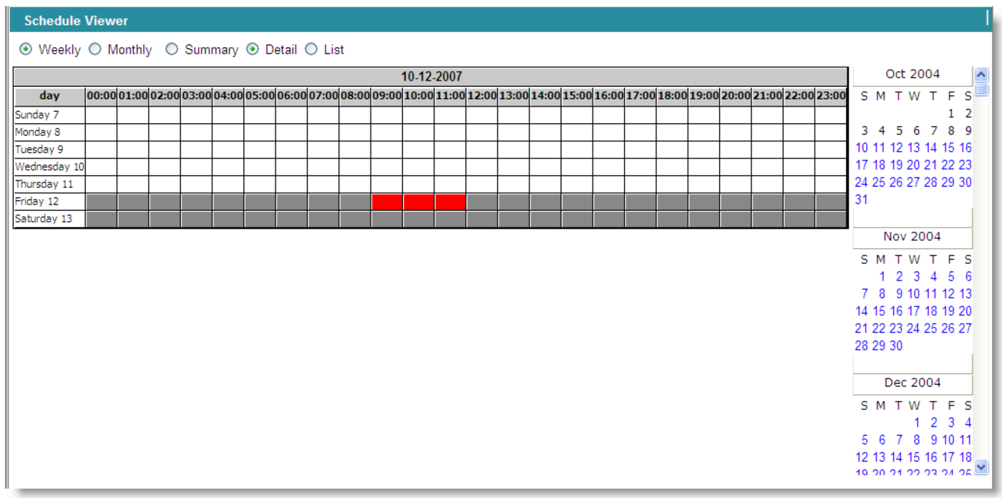
Displaying Schedules by Week and Detail

Use this procedure to see the schedule detail by interval for each day of the week.

To display schedules by week and detail:

- From the Schedule Viewer, choose Weekly and Detail. The calendar appears (Figure 29).

Figure 29. Schedule Viewer by week and detail



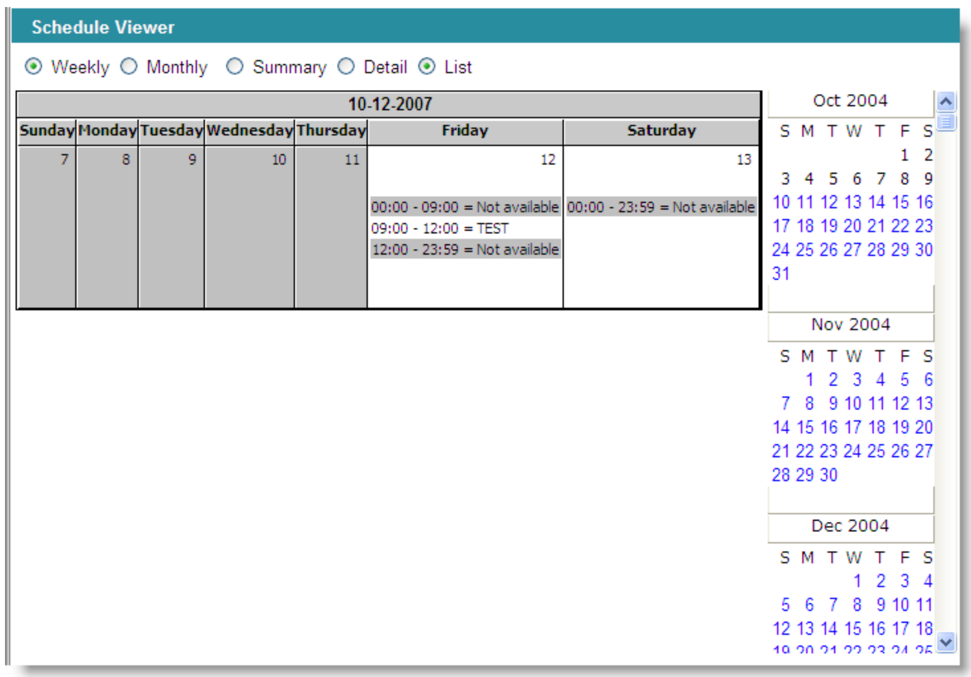
Displaying Schedules by Week and List

Use this procedure to see the start and end times for each break, lunch, in service, exception and work condition that appears in your schedule for each day of the week.

To display schedules by week and list:

- From the Schedule Viewer, choose Weekly and List. The calendar appears (Figure 30).

Figure 30. Schedule viewer by week and list



Using the Bulletin Board

5

Introduction

The Bulletin Board pane provides a summary of the current schedule offers and trades. All agents have access to the bulletin board. The CWFM only displays messages from other agents in your team or CSQ.

From the bulletin board, you can:

- Evaluate schedule offers and trades
- Offer schedules to other agents
- Trade schedules with another agent
- Modify and delete schedule offers and schedule trades

Bulletin Board

The actions you can perform from the Bulletin Board pane include:

- Evaluating and accepting a schedule offer or trade
- Editing your schedule offer or trade
- Deleting your schedule offer or trade

To access the Bulletin Board pane, choose **My Page** > **Bulletin Board.**

Figure 31. Bulletin Board

The columns are described in the following table.

Field Name	Description
Sequence	The chronological order in which the offers and trade request have been created.
Agent Name	The name of the agent who initiated the schedule offer or trade request.
Schedule Date	The date the schedule offer or trade request was initiated.
Expiration Date	When the schedule offer or trade request expires.
Status	The current status of the schedule offer or trade request. Possible values are Open, Closed and Assigned.
Type	The request type. Possible values are Offer or Trade.
Comment	The agent's comment regarding this schedule offer or trade request.

Field Name	Description
Actions	Actions you can perform on a schedule offer or request to trade. The possible actions are: • Click to evaluate and accept a schedule trade proposal or schedule offer from another agent. See "Accepting a Trade Request" on page 56 or "Accepting a Schedule Offer" on page 58 for more information. • Click to edit your schedule trade proposal or schedule offer. See "Creating a Schedule Offer or Trade Request" on page 54 for additional information. • Click to delete your schedule trade proposal or schedule offer. See "Creating a Schedule Offer or Trade Request" on page 54 for more information.

Creating a Schedule Offer or Trade Request

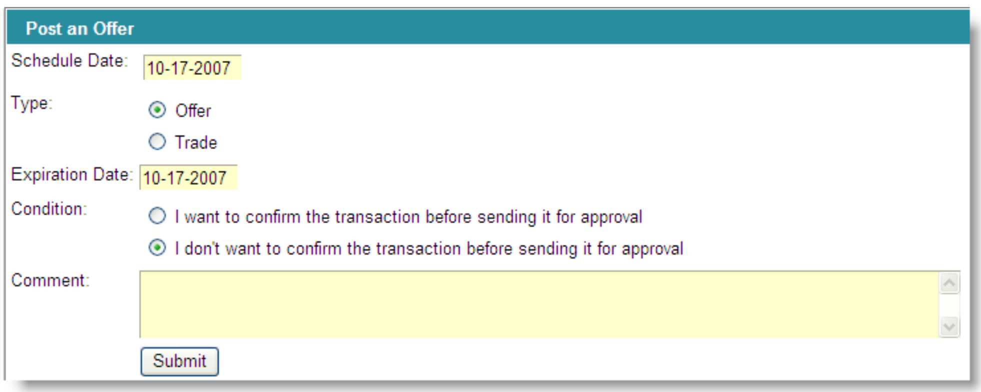
Perform this procedure when you want to create a schedule offer or trade request.

The schedule offer or trade requests appears on the bulletin board when you submit it. When another agent accepts your schedule offer or trade request, a message appears in your inbox.

To create a schedule offer trade request:

1. From the Bulletin Board, click (New) to create a new schedule offer. The Post an Offer on the Bulletin Board pane appears (Figure 32).

Figure 32. Post an Offer on the Bulletin Board



2. Enter the date of the schedule you want to offer in the Schedule Date field. See "Entering Dates" on page 24 for more information.
3. Select one of the following options:
   - Offer — Select this option when you want make your schedule available to others (for example, when you plan to be absent for a day).
   - Trade — Select this option when you want to trade your schedule with another agent.

   NOTE: You can also initiate a schedule trade request from you inbox. See "Creating a Schedule Trade Request" on page 32 for more information.

4. Enter the date when this offer will expire in the Expiration Date field.
5. Select one of the following options:
   - I want to confirm the transaction before sending it for approval — Select this option if you want confirm a transaction before sending it to the supervisor for approval.

- I don't want to confirm the transaction before sending it for approval — Select this option if you want this transaction to go directly to the supervisor for approval.

6. Enter the reason why you are initiating this offer or trade in the Comment field.
7. Click Submit to post your schedule offer or trade request on the bulletin board.
8. Click (Back) to return to the bulletin board. The schedule offer or trade appears in the Bulletin Board. When another agent accepts the offer or trade, the accepted offer or trade appears in the administrator's Inbox, where the administrator can approve or deny the accepted offer or trade.

Accepting a Trade Request

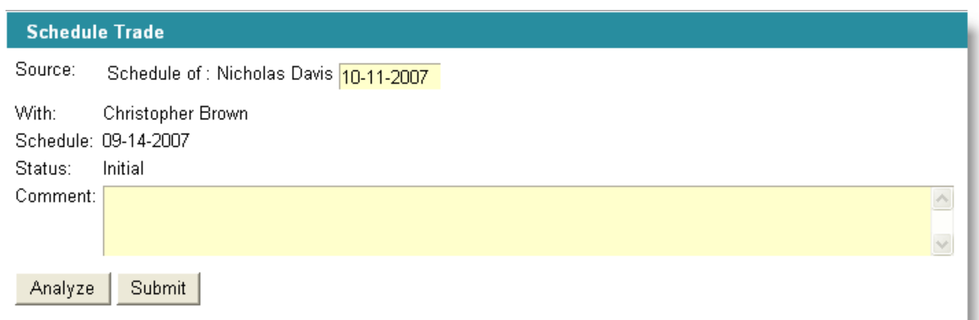
Trade requests appear on the bulletin board. You can accept any trade offer that appears on your bulletin board.

Perform this procedure when you want to accept a trade request that from another agent.

To accept a trade request:

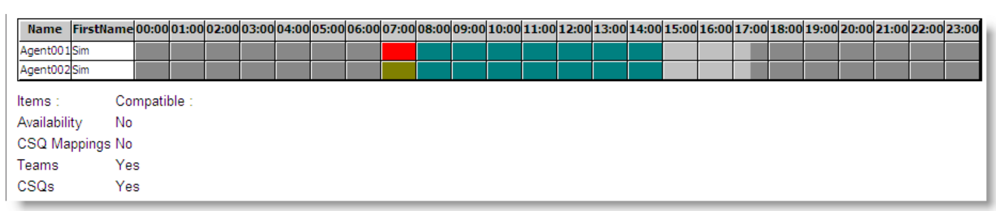
1. From the Bulletin Board pane, click ✓ (Accept Swap) next to the schedule offer trade request you want to accept. The Schedule Trade pane appears (Figure 33).

Figure 33. Schedule Trade



2. Enter the date of the schedule you want to offer in the Source field. See "Entering Dates" on page 24 for more information.
3. Enter the reason you are accepting this trade request in the Comment field.
4. Click Analyze to display your schedule and the other agent's schedule (Figure 34).

Figure 34. Schedule trade: Analyze



5. Compare the schedules.

   The default colors are:

   - Dark grey indicates not available for scheduling
   - Light grey indicates available for scheduling, but not scheduled

- Red indicates an exception
- Green indicates in service
- Pink indicates meal time
- Yellow indicates on a break

6. If a Yes appears in the Compatibility column for CSQs or Team, click Submit to send your schedule trade acceptance to the agent with whom you want to trade your schedule.

   WFM displays Assigned in the Status field on the Bulletin Board for this schedule trade acceptance. When you accept a trade, the accepted trade appears in the administrator’s Inbox, where the administrator can approve or deny the accepted trade.

Accepting a Schedule Offer

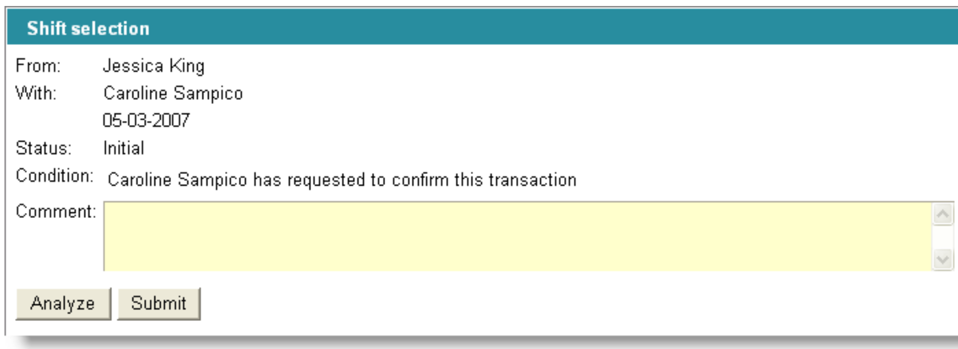
Schedule offers appear on the bulletin board. You can accept any schedule offer that appears on your bulletin board.

Perform this procedure when you want to accept a schedule that from another agent.

To accept a schedule offer:

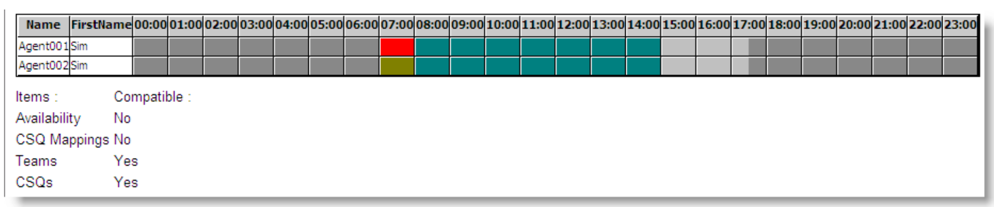
1. From the Bulletin Board pane, click (Accept Offer) next to the schedule offer you want to accept. The Shift selection pane appears (Figure 35).

Figure 35. Shift selection



2. Enter the reason why you are accepting this schedule offer in the Comment field.
3. Click Analyze to display both schedules (Figure 36).

Figure 36. Shift selection: Analyze



4. If a Yes appears in the Compatibility column for CSQs or Team, click Submit to send your schedule offer acceptance.

   WFM displays Assigned in the Status field on the Bulletin Board for this schedule offer acceptance. When you accept an offer, the accepted offer appears in the administrator's Inbox, where the administrator can approve or deny the accepted offer.

Displaying Your Productivity

6

Introduction

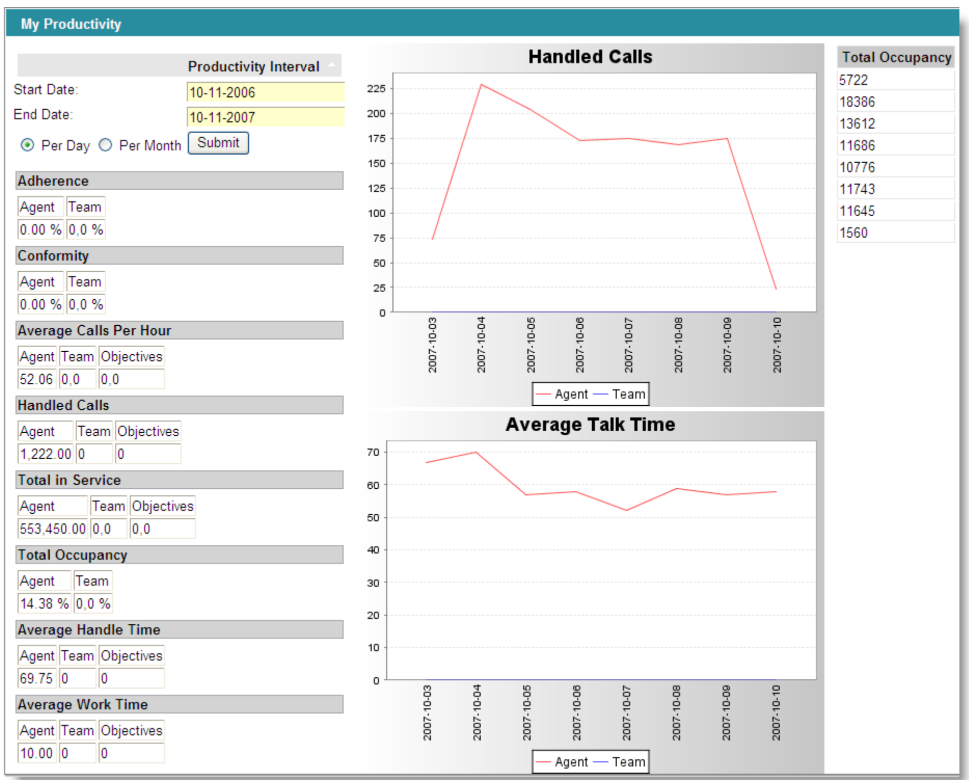
The My Productivity pane allows you to display your productivity by day or month for a specified interval on a customized dashboard. The data is presented in graph and tabular formats.

Your Productivity Dashboard

The My Productivity dashboard (see Figure 37) displays your productivity for the selected interval. You can use it to compare your productivity against your team's productivity and your team's objectives. To access the My Productivity dashboard, choose **My Page** > **My Productivity** and follow the instructions in "Viewing Your Productivity Information" on page 63.

The appearance of this dashboard can be modified to suit your preferences. See "Customizing a Dashboard" on page 19 for more information about modifying the My Productivity dashboard.

Figure 37. My Productivity dashboard



The fields are described below.

Field Name	Description
Start Date	Enter the start date for the interval in the Start Date field. See "Entering Dates" on page 24 for more information.
End Date	Enter the end date for the interval in the End Date field. See "Entering Dates" on page 24 for more information.

Field Name	Description
Per Day	Select this option if you want to display your productivity by day.
Per Month	Select this option if you want to display your productivity by month.
Adherence	Displays the average percent of adherence to a schedule by you and your team. • Agent — Displays you average adherence to the schedule within the selected interval. Team — Displays your team's average adherence to the schedule within the selected interval.
Conformity	Displays the average of conformity to a schedule by you and your team. • Agent — Displays your average conformity to the schedule within the selected interval. • Team — Displays your team's average conformity to the schedule within the selected interval.
Average Calls per Hour	Displays the average number of calls answered by you and your team within the selected interval as well as the team's objective. • Agent — Displays the average number of calls you answered within the selected interval. • Team — Displays the average number of calls answered by the your team within the selected interval. • Objective — Displays the average number of calls that the team is expected to answer within the selected interval.
Handled Calls	Displays the total number of calls that you and your team handled within the selected interval as well as the team's objective. • Agent — Displays the total number of calls you handled within the selected interval. • Team — Displays the total number of calls handled your team handled within the selected interval. • Objective — Displays the total number of calls that the team is expected to handle.

Field Name	Description
Total in Service	Displays the time in seconds spent by you and your team taking calls, performing after call work and waiting to take calls. It also displays your team's objectives. • Agent — Displays the total number of seconds you spent. • Team — Displays the time in seconds your team spent. • Objective — Displays the time in seconds that the team is expected to spend.
Total Occupancy	Displays the total percent of time you and your team spent on calls within the selected interval. • Agent — Displays the percent of time you spent on calls. • Team — Displays the percent of time your team spent on calls.
Average Handle Time	Displays the average time in seconds you and your team spent handling calls within the selected interval. • Agent — Displays the average time in seconds you spent handling calls. • Team — Displays the average time in seconds your team spent handling calls. • Objective — Displays the average time in seconds that the team is expected to spend handling calls.
Average Work Time	Displays the average time in seconds you and your team spent completing after call-work within the selected interval. • Agent — Displays the average time in seconds you spent completing after-call work. • Team — Displays the average time in of seconds your team spent completing after-call work. • Objective — Displays the average time in seconds that the team is expected to spend completing after-call work.
Date	Displays the date. If you selected Per day, this column displays each day within the selected interval. If you select Per month, this column displays the first day in the month.
Total Occupancy	Displays the total time of time you spent on calls within the selected interval.

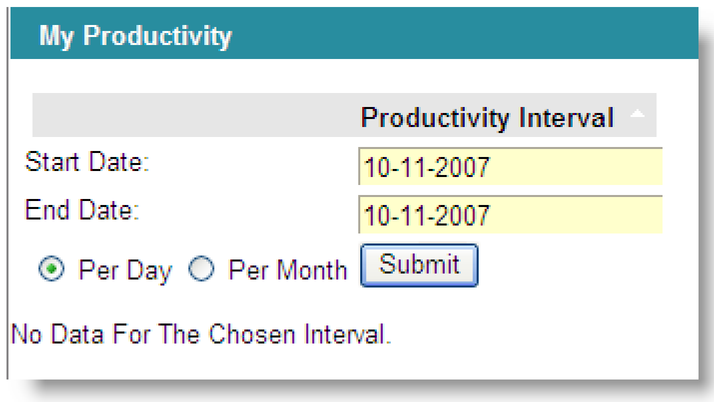
Viewing Your Productivity Information

Use this procedure to view your productivity information.

To view your productivity information:

1. From the Navigation menu, choose **My Page** > **My Productivity.** The My Productivity pane appears (Figure 38).

Figure 38. **My Productivity**



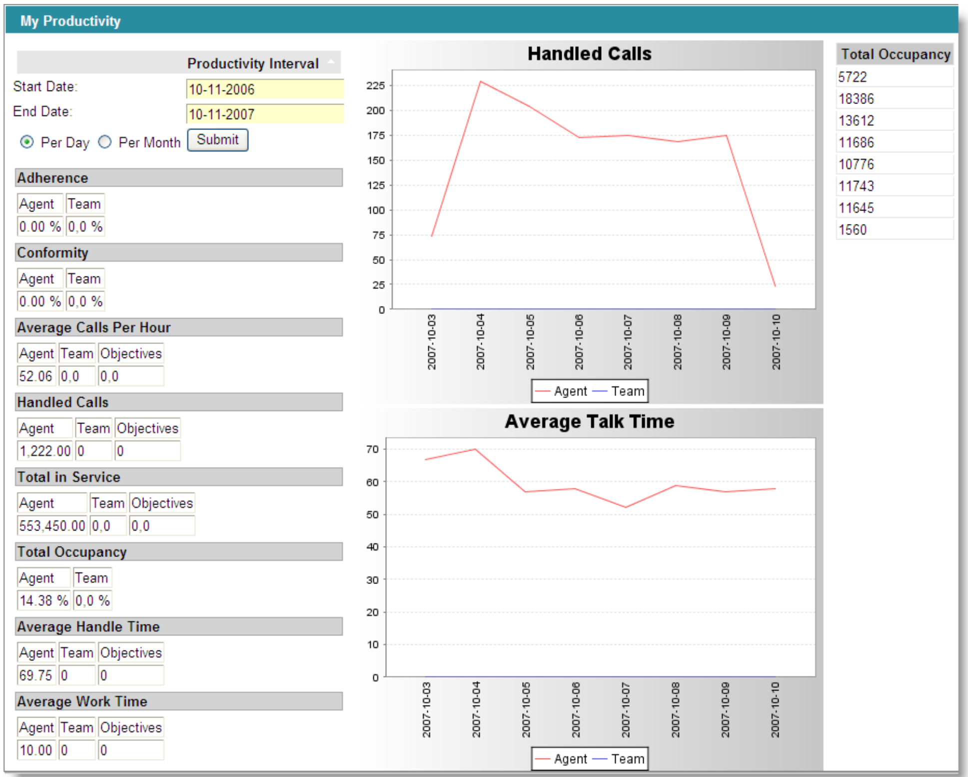
2. To view your productivity for a specific interval, enter the start date and end date for the interval in the Start Date and End Date fields. See "Entering Dates" on page 24 for more information.

   NOTE: You must chose dates for which you actually worked.

3. Choose one of the following options:
   - Per Day — Select this option to display your productivity by day.
   - Per Month — Select this option to display your productivity by month.
4. Click Submit to display the information.

WFM displays your productivity dashboard (Figure 39).

Figure 39. My Productivity dashboard



7 Displaying Your Statistics

Introduction

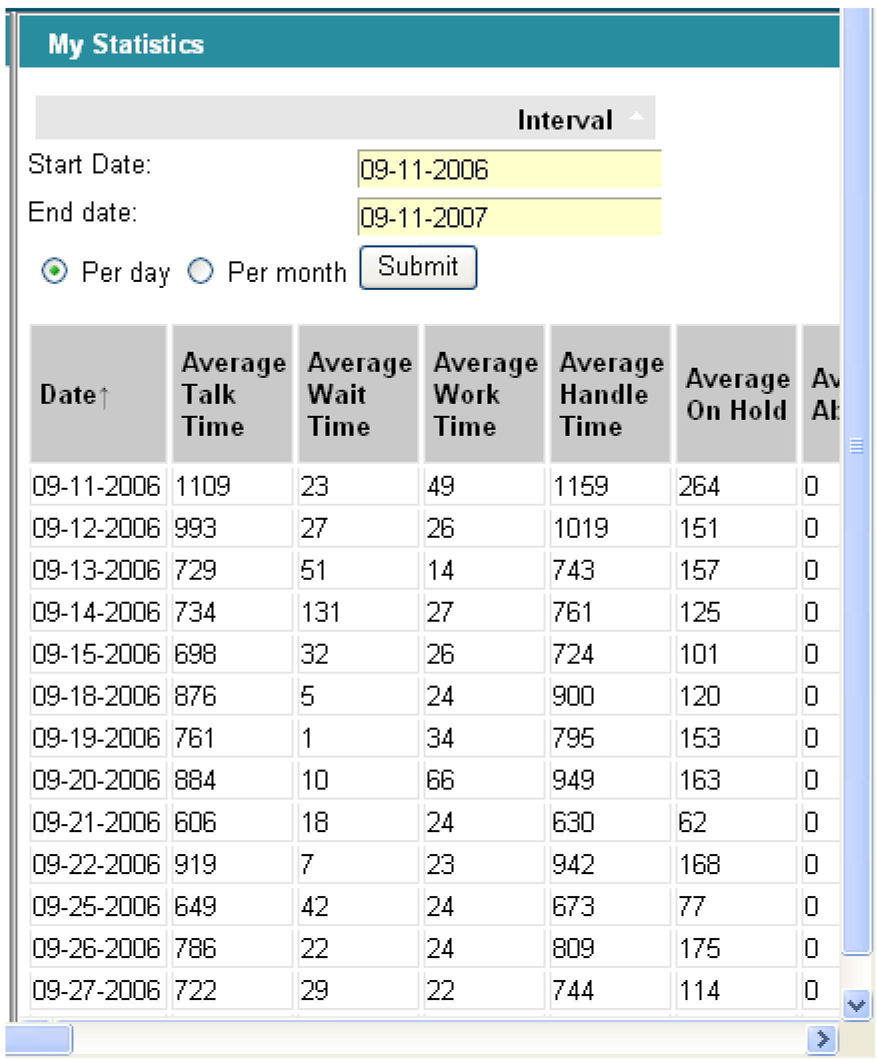
The My Statistics pane allows you to display your statistics by day or by month for a specified interval. The data is presented in tabular format.

Your Statistics

The My Statistics dashboard (see Figure 40) displays your statistics for the selected interval. To access the My Productivity dashboard, choose **My Page** > **My Statistics** and follow the instructions in "Displaying Your Statistics" on page 69.

The appearance of this dashboard can be modified to suit your preferences. See "Customizing a Dashboard" on page 19 for more information modifying the My Productivity dashboard.

Figure 40. My Statistics



Date↑	Average Talk Time	Average Wait Time	Average Work Time	Average Handle Time	Average On Hold	Av Ab
09-11-2006	1109	23	49	1159	264	0
09-12-2006	993	27	26	1019	151	0
09-13-2006	729	51	14	743	157	0
09-14-2006	734	131	27	761	125	0
09-15-2006	698	32	26	724	101	0
09-18-2006	876	5	24	900	120	0
09-19-2006	761	1	34	795	153	0
09-20-2006	884	10	66	949	163	0
09-21-2006	606	18	24	630	62	0
09-22-2006	919	7	23	942	168	0
09-25-2006	649	42	24	673	77	0
09-26-2006	786	22	24	809	175	0
09-27-2006	722	29	22	744	114	0

NOTE: You can select different statistics report types in your preferences (see "Customizing a Dashboard" on page 19).

The following table describes the column headings.

Field Name	Description
Date	The date. If you selected Per day, this column displays each day within the selected interval. If you select Per month, this column displays the first day in the month.
Average Talk Time	The average talk time you spent processing a call.
Average Wait Time	The average time you spent in Ready state waiting for a call.
Average Work Time	The average time you spent completing post-call work.
Average Handle Time	The average talk plus work time required to process a call.
Average On Hold	The average time the caller remained on hold.
Average Absence	The average time you were in the Not Ready state and unavailable to take calls.
Total in Session	The total time you were logged in.
Total Talk Time	The total time you spent in Talking state for calls.
Total Wait Time	The total time you spent in Ready state waiting for calls.
Total Work Time	The total time you spent on after call work.
Total Processing	The total processing time you spent handling calls, waiting for calls and completing after-call work.
Total in Service	The total time you were logged in onto the ACD.
Total Occupancy	The total time you spent handling calls.
Total on Hold	The total time callers spent on hold.

Field Name	Description
Total Absence	The total time when you were in Not Ready state and not available for calls.
Handled Calls	The total number of calls that you handled within the selected period.
Inbound Calls	The total number of incoming calls.
Outbound Calls	The total number of outgoing calls.
Transferred Calls	The total number of calls transferred.
In Session Ratio	The percentage of time you were logged in during this schedule period.
Processing Ratio	The percentage of in service time you spent handling call or not ready.
Occupancy Ratio	The percentage of time you spent handling a call.
Average Calls per Hour	The average number of calls you handled per hour.
Real-time Adherence	The percentage of adherence to the schedule for that date.
Real-time Conformity	The percentage of conformity to the schedule.

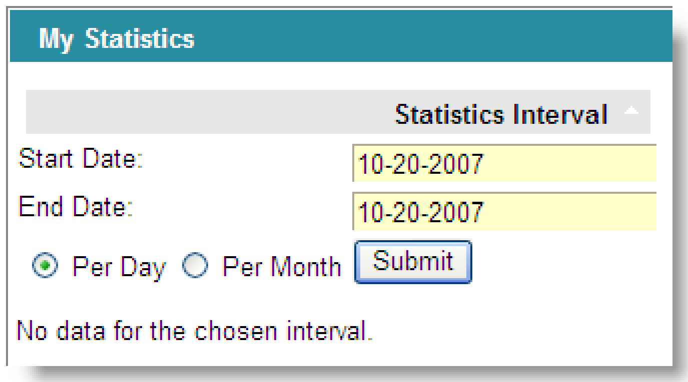
Displaying Your Statistics

Use this procedure to display the My Statistics pane.

To display my statistics:

1. From the Navigation menu, choose **My Page** > **My Statistics.** The My Statistics pane appears (Figure 41).

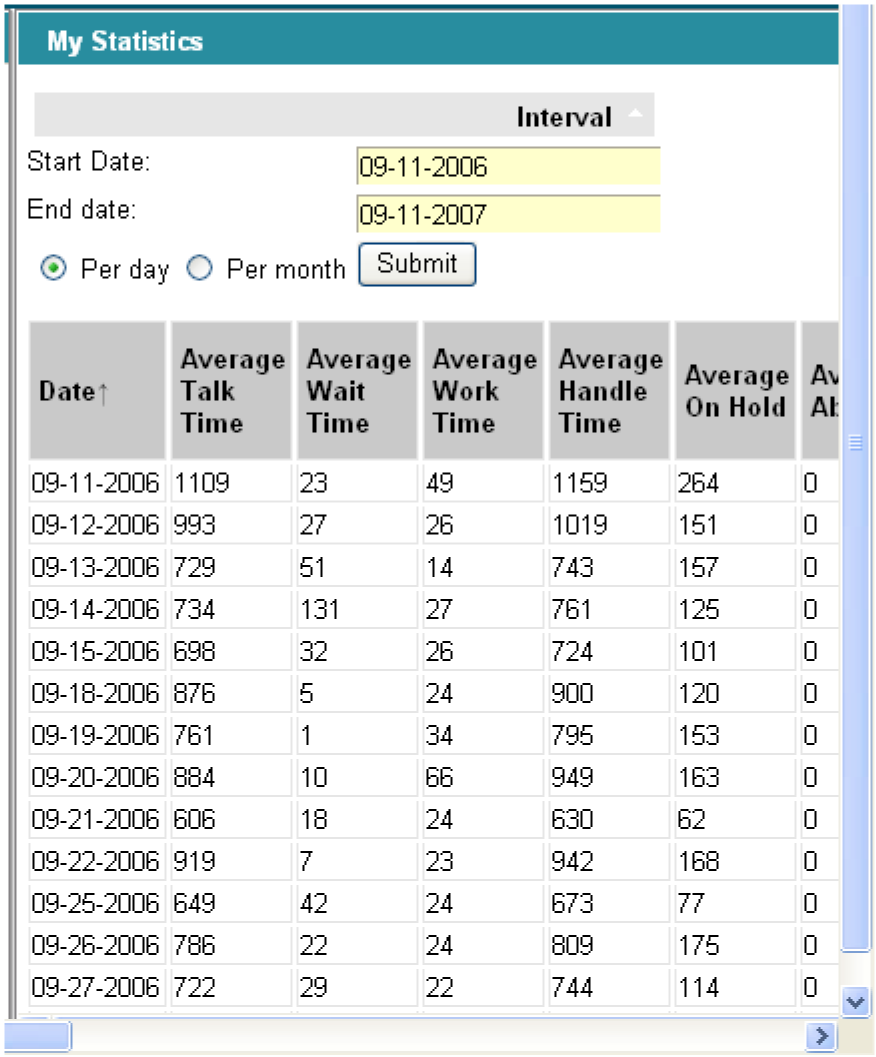
Figure 41. My Statistics



2. To view your statistics for a specific interval, enter the start date and end date for the interval in the Start Date and End Date fields. See "Entering Dates" on page 24 for more information.
3. Select one of the following options:
   - Per Day — Select this option if you want to display your statistics by day.
   - Per Month — Select this option if you want to display your statistics by day.
4. Click Submit to display the information.

5. WFM displays your statistics dashboard (Figure 42).

Figure 42. My Statistics



Date↑	Average Talk Time	Average Wait Time	Average Work Time	Average Handle Time	Average On Hold	Av Al
09-11-2006	1109	23	49	1159	264	0
09-12-2006	993	27	26	1019	151	0
09-13-2006	729	51	14	743	157	0
09-14-2006	734	131	27	761	125	0
09-15-2006	698	32	26	724	101	0
09-18-2006	876	5	24	900	120	0
09-19-2006	761	1	34	795	153	0
09-20-2006	884	10	66	949	163	0
09-21-2006	606	18	24	630	62	0
09-22-2006	919	7	23	942	168	0
09-25-2006	649	42	24	673	77	0
09-26-2006	786	22	24	809	175	0
09-27-2006	722	29	22	744	114	0

Index