Cisco Unified Workforce Optimization

Workforce Management Agent User Guide 8.3(4)
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Introduction

This document describes how to use the Cisco Workforce Management (WFM) agent interface.

The WFM agent interface allows you to:

- Manage your inbox
- View your schedule
- Trade schedules with another agent
- Offer schedules to other agents
- Manage your bulletin board
- Enter requests for time off
- Display your productivity indicators
- Display your statistics and compare them against your team's statistics

Intended Audience

This document is written for contact center agents who use WFM.

WFM Documentation

The following documents contain additional information about WFM:

- *Cisco Workforce Management Administrator User Guide*
- *Cisco Workforce Management Installation Guide*
- *Cisco Workforce Management Troubleshooting Guide*
- *Cisco Workforce Management Release Notes*

Getting Started

2

Introduction

This chapter covers the following topics:

Logging In to WFM

The following procedure describes how to log in to WFM.

To log in to WFM:

1. Enter the following URL in your web browser, where <wfm> is either the name or IP address of the server on which WFM is installed. The Workforce Management login window appears (Figure 1).

   Figure 1. Workforce Management login window


   ```
   http://<wfm>:8087/c3/
   ```

   NOTE: The website address is case sensitive.

2. Enter your WFM username and password. The username is not case sensitive and the password is case sensitive.

   NOTE: If your company uses Active Directory with WFM, your WFM username and password is your network login username and password. If your company does not use Active Directory with WFM, ask your system administrator for your WFM username and password.

NOTE: Click GO or press Enter to log in to WFM. The Workforce Management window appears ().

Using the Agent Interface

The WFM agent interface () has two panes. The left pane contains the Navigation menu. The right pane displays the fields associated with the menu item you select in the left pane.

Using the Navigation Menu

Use these mouse actions to use the Navigation menu.

- To expand or collapse the menu, click My Page.
- To hide the Navigation pane, click (left arrow).
- To display the Navigation pane, click (right arrow).
- Click a task to display the associated data in the right pane.

Sorting a Table

Data that is presented in tabular form (Figure 2) 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.

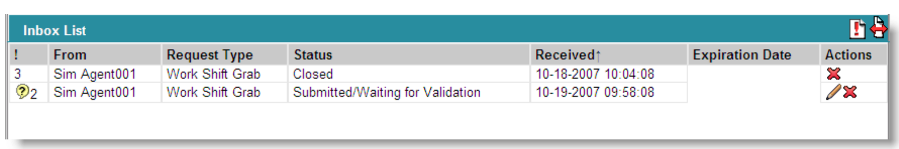
NOTE: Numbers are sorted from left to right, without accounting for the actual value of the number. For example, the numbers 1, 210, 0999, 3, 34, and 3104 are sorted in ascending order as follows:

0999, 1, 210, 3, 3104, 34

To sort a table:

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

Figure 2. Example of 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		

Viewing Long Tables

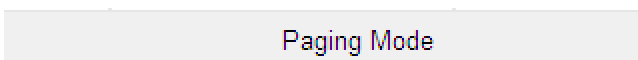
WFM often displays information in tables. Some tables have more rows than can be viewed on one pane. When a table is large, options appear at the bottom of the pane that allow you to move quickly through the table.

You view tables either in paging mode (the default) or scrolling mode. Figure 3 displays the text that appears at the bottom of the pane when you are in paging mode.

Figure 3. Paging mode

Figure 4 displays the text that appears at the bottom of the pane when you are in scrolling mode.

Figure 4. Scrolling mode

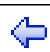
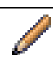


Use these mouse actions to view a large table.

- Click Show All to switch to scrolling mode and display the table on a single page. Use the scroll bar on the right to move up and down on the page.
- Click Paging Mode to display items on multiple pages. When in paging mode, use the following mouse actions:
  - Click (Next Group) or (Previous Group) to move forward or backward 5 pages at a time.
  - Click Last to go to the last page.
  - Click First to go to the first page.
  - Enter a page number in the Goto field and click Goto to jump directly to that page. You can also click the desired page number between the arrows.

Icon Descriptions

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

Icon	Action	Description
	Hide	Hide the Navigation pane.
	Restore	Display the Navigation pane.
	New	Post an offer.
	Save	Save the newly-created or modified items.
	Delete	Delete the selected files.
	Launch a request	Submit 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. **NOTE:** The back button in Internet Explorer is disabled.
	Graph	Display a data graph. **NOTE:** This icon appears only when there are 100 or fewer rows in a table.
	New exception request	Create a new exception request.
	New schedule swap request	Create a new request to trade schedules.
	Edit	Edit a request.

Navigation Button Descriptions

The following table describes the most frequently-used navigation buttons.

Button	Description
Preferences	Displays the My Preferences pane. See "Setting Display Preferences" on page 14 for more information.

Button	Description
Help	Displays help. WFM provides detailed, browser-based help with comprehensive descriptions and step-by-step procedures.
About	Displays information about the WFM version in a separate dialog box. NOTE: Turn off your pop-up blocker to view this information.
Logout	Ends your session. When you click Logout, a confirmation dialog box appears. Click OK to confirm logging out and display the WFM Login window.

Setting Display Preferences

Use the procedures below to change your display preferences.

- Displaying the Date Format (page 14)
- Customizing Dashboards (page 14)
- Selecting Schedule Display Parameters (page 16)
- Changing Your Password (page 16)

Displaying the Date Format

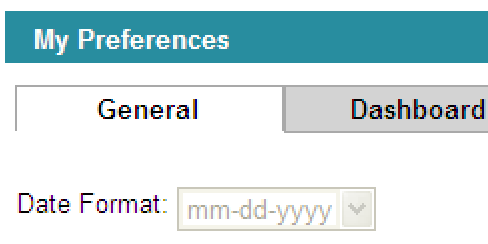
Use this procedure to view the default date format that appears in WFM panes and reports. The format displayed depends on your locale. For example, in the US, the date format displayed is mm-dd-yyyy.

Use the displayed format when entering dates. You cannot change the date format.

To display the default date format:

- Click Preferences and select the General tab. The General tab displays the Date Format (Figure 5).

Figure 5. My Preferences: General tab



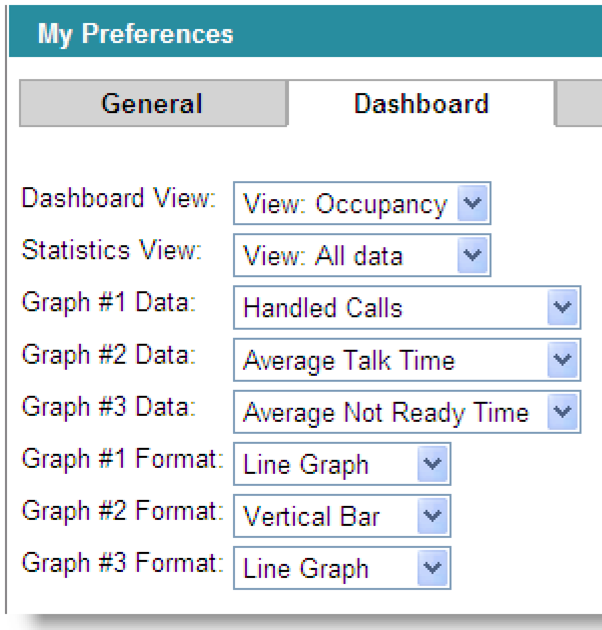
Customizing Dashboards

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

To customize a dashboard

1. Click Preferences and select the Dashboard tab. The Dashboard tab appears (Figure 6).

Figure 6. My Preferences: Dashboard tab



2. Select the view you want to display on your My Productivity dashboard from the Dashboard View drop-down list.
3. Select the view you want to display on your My Statistics dashboard from the Statistics View drop-down list.
4. Select the data you want to display for each graph in your My Productivity dashboard from the Graph #1 Data, Graph #2 Data and Graph #3 Data drop-down lists.
5. Select the format you want for each graph in your My Productivity dashboard from the Graph #1 Format, Graph #2 Format and Graph #3 Format drop-down lists.
6. Click (Save) to save your changes.

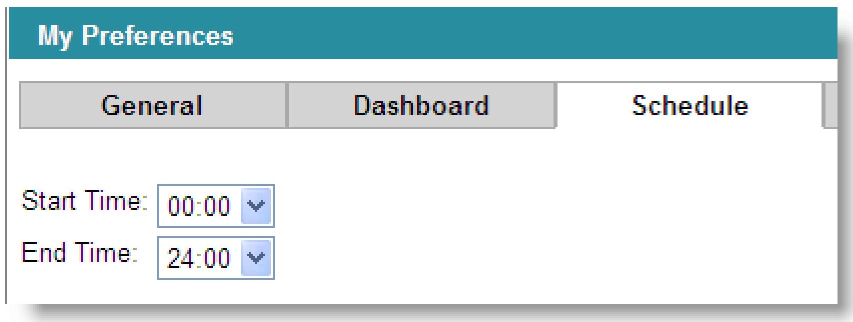
Selecting Schedule Display Parameters

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

To select schedule display parameters:

1. Click Preferences and select the Schedule tab. The Schedule tab displays schedule options (Figure 7).

Figure 7. My Preferences: Schedule tab



2. In the Start Time field, select the time you want the schedule display to start.
3. In the End Time field, select the time when you want the schedule display to end.
4. Click (Save) to save your changes.

Changing Your Password

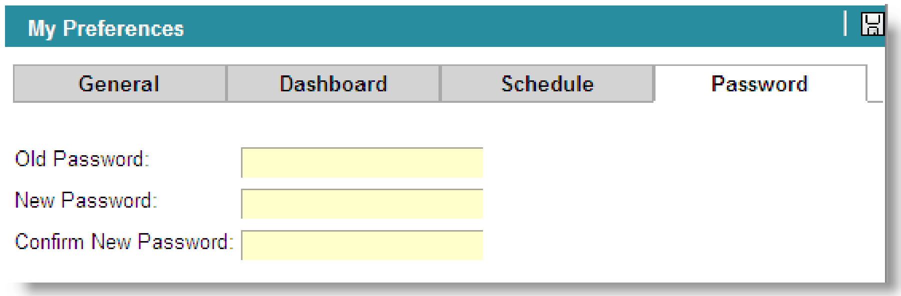
Use this procedure to change the password you use when logging in to WFM.

NOTE: The Password tab does not appear if your company uses Active Directory. WFM automatically uses the password associated with your Active Directory username. Use Microsoft Windows to change your password.

To change your password:

1. Click Preferences, and select the Password tab. The Password tab enables you to change your password (Figure 8).

Figure 8. My Preferences: Password tab



2. Enter your current password in the Old Password field.
3. Enter your new password in the New Password field.
4. Reenter your new password in the Confirm New Password field to ensure the accuracy of what you entered in the New Password field.
5. Click (Save) to save your changes.

Entering Dates

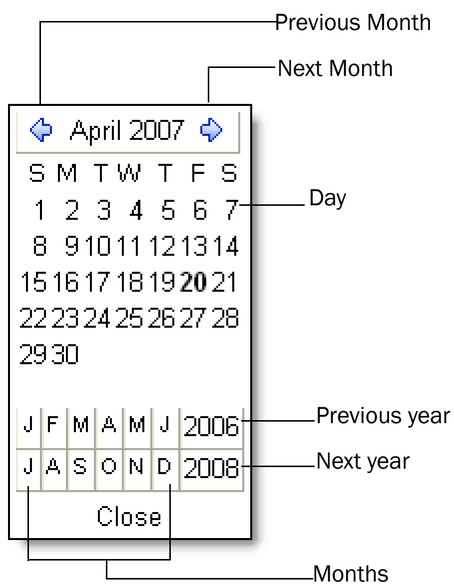
When entering dates in WFM, you can either:

- Enter the date manually using the format specified on the General tab in My Preferences (by default, mm-dd-yyyy)
- Select the date from the popup calendar that appears when you click the date field

To enter a date in a field using the popup calendar:

1. Click a date field in the pane. The calendar appears at the top of the Navigation pane (Figure 9).

Figure 9. Popup calendar



2. Fill the date field by selecting the desired date from the popup calendar. By default, the calendar displays the current month and year.
   - To select a previous or future year, click the desired year at the bottom right of the calendar.
   - To select a month, click the letter associated with the month at the bottom left of the calendar. The letters are displayed in month order. You can also display the next or previous month by clicking (next month) or (previous month).
   - To select a day, click the date in the calendar.
3. Click Close to dismiss the calendar.

Managing My Page

3

Introduction

This chapter covers the following topics:

Inbox

The Inbox List pane (Figure 10) displays all messages that are sent to you and requests sent by you. To access the Inbox List pane, select My Page > Inbox.

Figure 10. Inbox List

From the Inbox List pane, you can:

- Create exception requests for time off (for example, medical appointments)
- Trade schedules with another agent
- Offer schedules for other agents to accept
- Accept schedule trades from other agents
- Review the current status of requests
- View request results
- Edit requests

Table 1 describes the Inbox List pane icons and columns.

Table 1. Inbox List pane icons and columns

Field Name	Description
!	An icon and a number that has a specific meaning related to the status of the message. • 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	The name of the agent who sent the request.

Table 1. Inbox List pane icons and columns (cont'd)

Field Name	Description
Request Type	The type of request: • Exception request. An agent is requesting an exception (for example, the agent needs to take the morning off to see a doctor). This request is usually submitted before a schedule is created, so the agent is not scheduled for this period. • Work Shift Grab. An agent is requesting a schedule trade with another agent. •
Status	The status of the request. The possible values are: • Closed. The request is resolved. • Submitted/Waiting for Validation. The request is open and waiting for a response.
Received	The date and time when the message was received or created.
Expiration date	The expiration date of the request.
Actions	Actions you can perform after you receive a schedule offer or request to trade. The possible actions are: • Click (Edit) to edit an existing request. • Click (Delete) to delete the request. See "Deleting Requests" on page 27 for more information. NOTE: You can only perform these actions if you initiated the request.
(New Exception Request)	Create a new exception request.
(New Schedule Swap Request)	Create a new schedule swap request.

Viewing Requests

To view the details of an existing request, click the Request Type for that request.

Exception Requests

Exception requests are used to request time off. The exception request is sent to your administrator for approval.

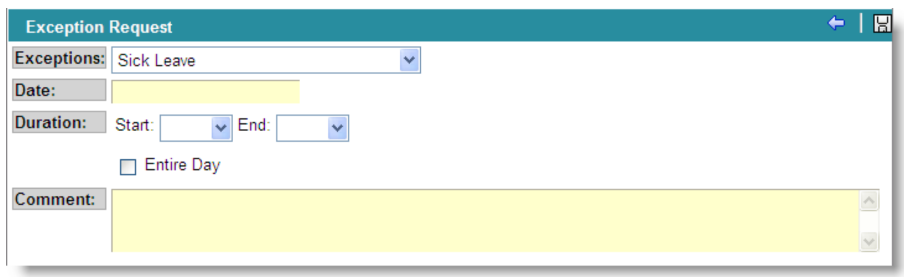
Creating an Exception Request

Create an exception request whenever you need to ask for time off.

To create an exception request:

1. From the Inbox List toolbar, click (New Exception Request). The Exception Request pane appears (Figure 11).

Figure 11. Exception Request pane



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

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

3. Enter the date when you need time off in the Date field. See "Entering Dates" on page 18 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 administrator for approval. The status on your exception request displays the following message:

   `Submitted/Waiting for validation.`

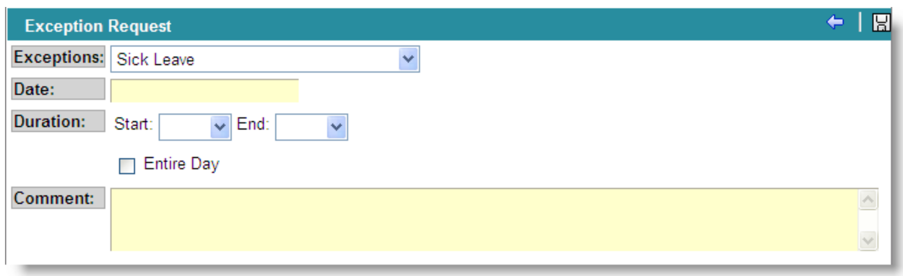
Editing Exception Requests

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 Actions column next to the exception request you want to edit. The Exception Request pane appears (Figure 12).

   Figure 12. Exception Request

2. Complete the fields. The fields are described in "Exception Requests" on page 22.
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 administrator for approval. The status on your exception displays the following message:

   `Submitted/Waiting for validation.`

Schedule Trade Requests

Schedule Trade requests are used to trade one of your scheduled days with another agent's scheduled days.

> **NOTE:** You can only trade days you are scheduled.

There are two types of schedule trade requests.

- Request a schedule trade for the same date (for example, trade a work shift that starts at 7:00 am for another work shift that starts at 3:00 pm on the same day)
- Request a schedule trade for a different day (for example, trade a scheduled work day for a scheduled day off)

Requests are sent to the administrator for approval.

When you create a schedule trade request from the Inbox, you also choose the agent with whom you want to trade schedules. This differs from posting a schedule trade request on the bulletin board, where any agent can accept the trade request.

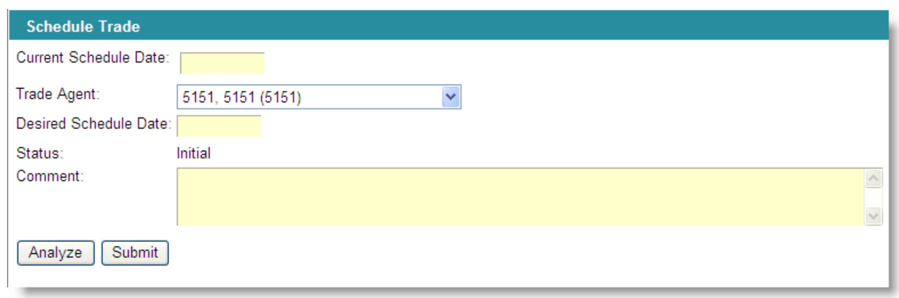
Creating Schedule Trade Requests

Use this procedure when you want to trade a scheduled day with another agent.

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 13).

Figure 13. Schedule Trade pane



2. Enter the date you want to trade in the Current Schedule Date field and the Desired Schedule Date field. See "Entering Dates" on page 18 for more information. When entering a date, consider the following information.

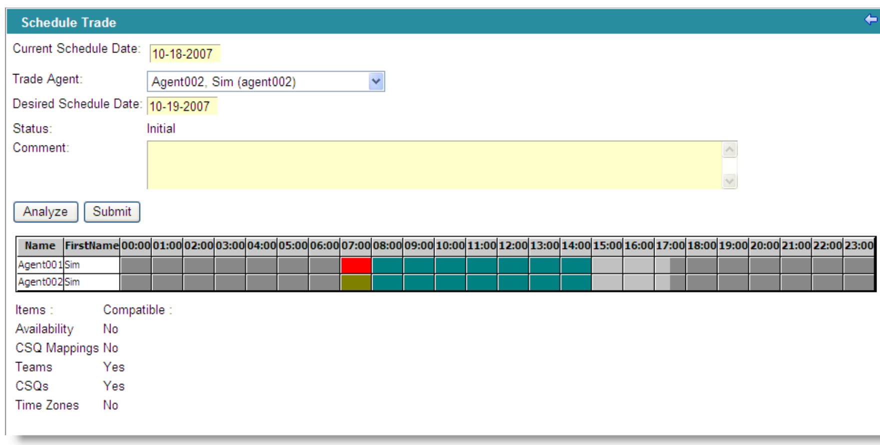
   - If you want swap shifts on the same day with another agent, enter the same date in the Current Schedule Date field and the Desired Schedule Date field. For example, you swap your work shift on Monday morning with another agent's Monday afternoon work shift.
   - If you want to trade one of your days off with another agent's day off:
     - In the Current Schedule Date field, enter the date of the other agent's current day off. This is the date you want to have off.
     - In the Desired Schedule Date field, enter the date of your current day off. This is the date you want to trade to the other agent.

   For example, you work Monday and have Tuesday off. Agent B has Monday off and works Tuesday. Enter Monday's date (the day you work/the day you want off) in the Current Schedule Date field and Tuesday's date (the day Agent B works/the day you have off) in the Desired Schedule Date field. When the request is submitted and approved, you will have Monday off and work Tuesday, and Agent B will work Monday and have Tuesday off.

NOTE: You can only trade days that you and the other agent are scheduled to work. Selecting a date when an agent is not scheduled to work causes a validation error.

3. Select the agent with whom you want to trade your schedule from the Trade Agent drop-down list.
4. Enter the reason why you are requesting this trade in the Comment field.
5. Click Analyze to display both schedules (Figure 14).The Analyze button only displays the schedules side-by-side. It performs no validation. Generally, a Yes in the Compatibility column for CSQs or Teams indicates this is a valid trade request.

Figure 14. Schedule Trade: Analyze



6. 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`

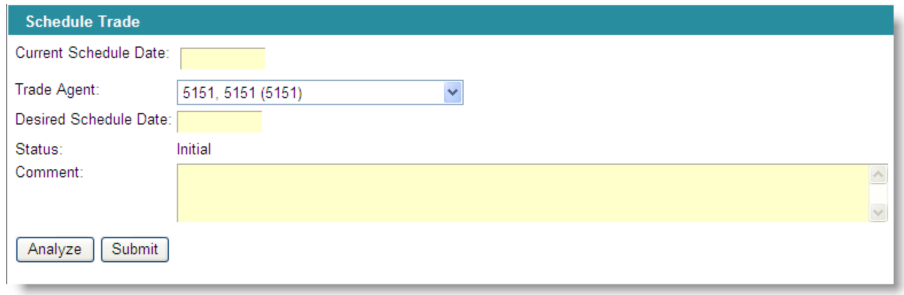
Editing Schedule Trade Requests

You can edit a Schedule Trade request after you submit it but only before the other agent accepts the request and the request is sent to the administrator for approval.

To edit a schedule trade request:

1. From the Inbox List, click (Edit) in the Actions column next to the schedule trade request you want to edit. The Schedule Trade pane appears (Figure 15).

Figure 15. Schedule Trade



2. Enter the changes you desire and then click Analyze.
3. If the results indicate that a trade is possible, click Submit to send your edited 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`

Approving or Denying Schedule Trade Requests

You can approve or deny any schedule trade request sent to your inbox.

WFM allows you to compare your schedule with another agent's schedule before approving the request. When you click the Analyze button on the Request Details pane, WFM displays your schedule and the other agent's schedule side by side for the specified day. Agents and administrators can validate compatibility by looking at the following fields:

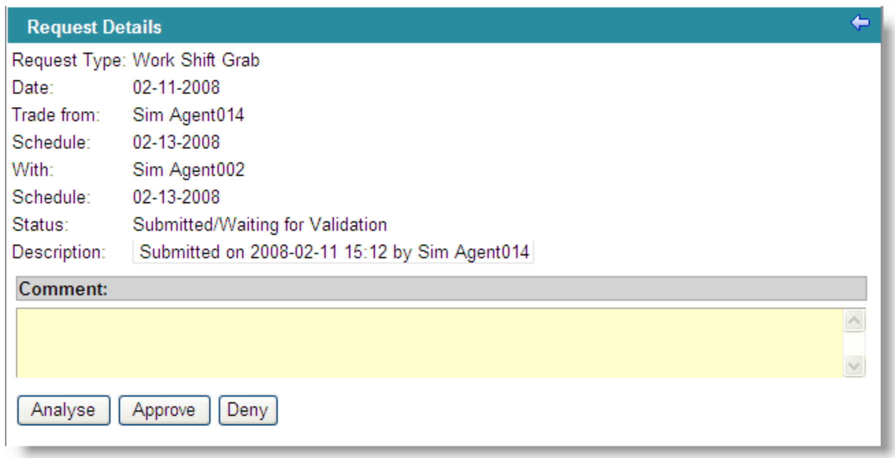
- Availability
- CSQ Mappings
- Teams
- CSQs
- Time Zones

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

To approve or deny a schedule trade request:

1. From the Inbox List, click Work Shift Grab in the Request Type column. The Schedule Trade pane appears (Figure 16).

Figure 16. Schedule Trade pane



2. Click Analyze to display both schedules.

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

3. Click Approve to accept the schedule trade request or Deny to reject the schedule trade request.

   The request is validated and sent to the administrator for approval. The status on schedule trade request displays the following message:

   `Validated/Waiting for Approval`

Deleting Requests

You can delete any request that displays (Delete) in the Actions column on the Inbox List.

To delete a request:

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

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

```
Delete done.
```

The request no longer appears in the Inbox List.

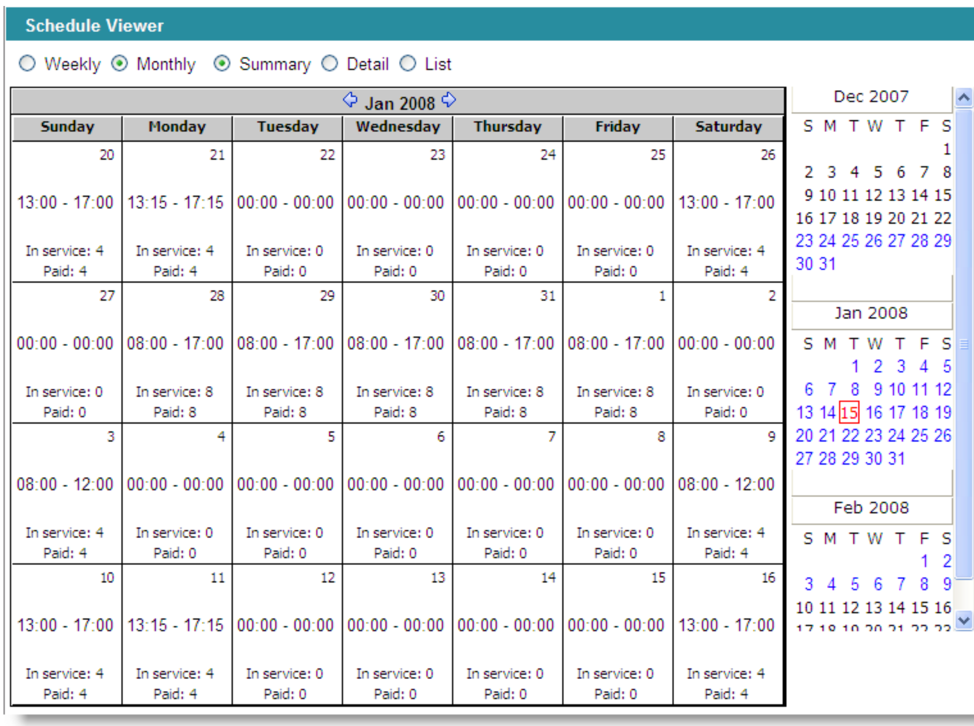
Schedules

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

Schedule Viewer

The Schedule Viewer (Figure 17) provides an overview of your schedule. To access the Schedule Viewer pane, choose My Page > My Schedules. Use the Schedule Viewer to display your schedules by day, week, or month with a summary, detailed, or list view.

Figure 17. Schedule View



Choosing a Time Period

You can choose one of the following time period options:

- Weekly — Displays the current week.
- Monthly (default view) — Displays a month (four full weeks starting with the current day).

Choosing the Level of Detail

After you specify the time period, you can choose one of the following level of detail options:

- Summary (default view) — 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.

Using Arrows to Select a Month

You can choose the month to be displayed. Click the arrows on either side of the month and date at the top of the calender to display the previous month or the next month.

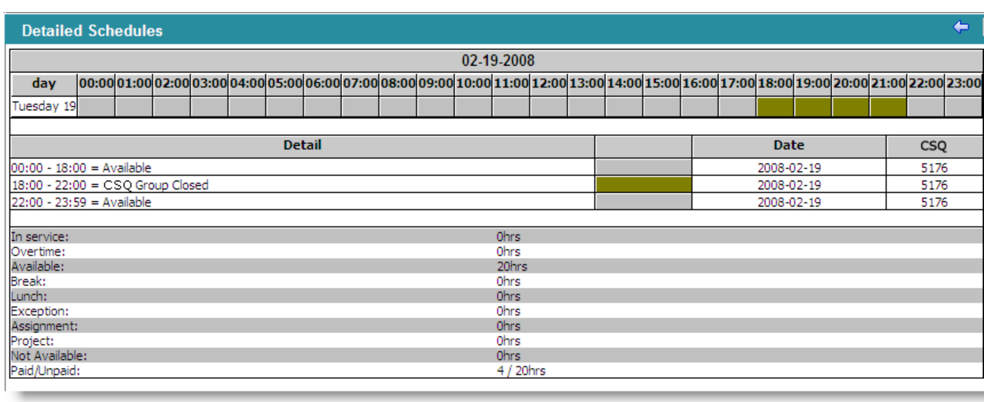
Selecting a Date from the Calendar

You can select the first date displayed in the Schedule Viewer from the Select Date Calendar. Selectable dates are highlighted in blue, and the current date is highlighted in red.

Viewing Detailed Schedule Information

To view detailed schedule information for a specific day, click the start and end time for the day. The Detailed Schedules pane appears (Figure 18).

Figure 18. Detailed Schedules



The fields are described below.

Field Name	Description
Date	Schedule date.

Field Name	Description
Day	Day of the week.
Detail	Displays the schedule in detail.
Service	Number associated with the service.
CSQ	Number associated with the CSQ.
In service	Amount of time an agent is scheduled to be logged in and ready to handle contacts.
Overtime	Amount of time the agent is scheduled to work overtime.
Available	Amount of time the agent is not scheduled but the agent’s work shift allows the agent to be scheduled.
Break	Amount of time the agent is scheduled to be on break.
Lunch	Amount of time the agent is scheduled to be at lunch.
Exception	Amount of time the agent is not handling contacts because of an exception.
Assignment	Amount of time the agent is scheduled for activities other than handling contacts.
Project	Amount of time allowed the agent to perform non-contact-related activities.
Not Available	Amount of time the agent is not scheduled for the CSQ and the agent’s work shift does not allow the agent to be scheduled.
Paid/Unpaid	Amount of time the agent is paid and not paid.

Bulletin Board

The bulletin board is a shared tool that all agents can use to post and accept schedule trade requests and offers. This allows the agent more schedule flexibility.

When you post a schedule trade request or offer on the bulletin board, you make it available to all agents in your team or CSQ. This differs from creating a schedule trade request from your inbox, where you request a trade with a specific agent.

NOTE: Administrators always have the final authority on any requests.

A schedule trade or offer has no impact on coverage of requirements for the team or CSQ, since only the name of the agent changes.

The Bulletin Board pane provides a summary of the current schedule offers and trades. WFM only displays messages from other agents in your team or CSQ.

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, choose My Page > Bulletin Board. The Bulletin Board pane appears (Figure 19).

Figure 19. Bulletin Board

The columns are described in the following table.

Field Name	Description
Sequence	The chronological order in which the offers and trade request appeared.
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.

Field Name	Description
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.
Actions	Actions you can perform on a schedule offer or request to trade. The possible actions are: • Click (Launch) to evaluate and accept a schedule trade proposal or schedule offer from another agent. See "Accepting a Trade Request" on page 35 or "Accepting a Schedule Offer" on page 36 for more information. • Click (Edit) to edit your schedule trade proposal or schedule offer. See "Creating Schedule Trade Requests" on page 24 for additional information. • Click (Delete) to remove your schedule trade proposal or schedule offer. See "Creating Schedule Trade Requests" on page 24 for more information.

Creating a Schedule Offer or Trade Request

This topic describes how to create a schedule trade request or schedule offer and post it on the Bulletin Board where other agents can accept it.

The types of schedule trades and offers you can post to the bulletin board are:

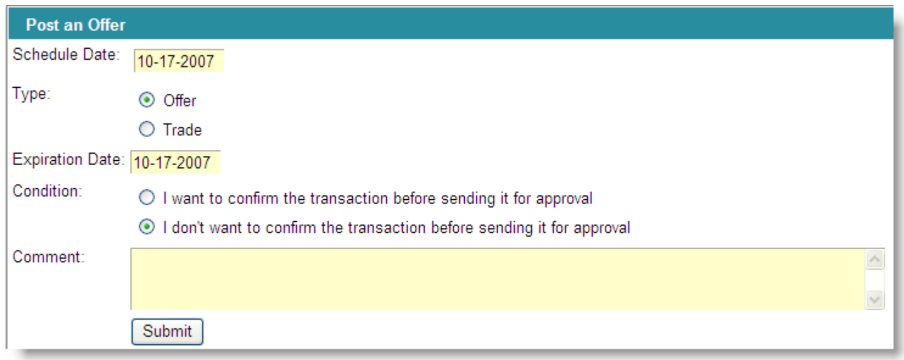
- Trade a schedule on the same day with another agent. For example, you can request to trade your Monday 7 am–11 am shift with another Monday shift. Another agent offers to take your morning shift and trade to you his Monday 2 pm–6 pm shift.
- Trade a schedule on different days. For example, you can request to trade your scheduled work day with another agent's scheduled day off.
- Offer a scheduled work shift to any agent. For example, if you are not available to work a particular shift you can offer that shift to any other agent who is available and wants the extra hours.

The schedule offer or trade request 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 or trade request:

1. From the Bulletin Board, click (New) to create a new schedule offer. The Post an Offer pane appears (Figure 20).

Figure 20. Post an Offer



2. Enter the date of the schedule you want to offer in the Schedule Date field. See "Entering Dates" on page 18 for more information.
3. Choose one of the following options:
   - Offer — Choose this option when you want make your schedule available to others (for example, when you plan to be absent for a day).
   - Trade — Choose this option when you want to trade your schedule with another agent.

   NOTE: You can also initiate a schedule trade request with a specific agent from your inbox. See "Creating Schedule Trade Requests" on page 24 for more information.

4. Enter the date when this offer will expire in the Expiration Date field.

   NOTE: The expiration date must be greater than the current date and less than the scheduled date. For example, if the current date is 10/11/08 and the Scheduled Date is 10/18/08, specify an expiration date between 10/12/08 to 10/17/08.

5. Choose one of the following options:
   - I want to confirm the transaction before sending it for approval — Choose this option to confirm a transaction before sending it to the administrator for approval.

- I don't want to confirm the transaction before sending it for approval — Choose this option to send this transaction directly to the administrator 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 on 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 it.

   NOTE: You can edit the request after you submit it and before the other agent accepts the request. See "Editing a Schedule Trade or Offer Request" on page 38 for more information.

Accepting a Trade Request

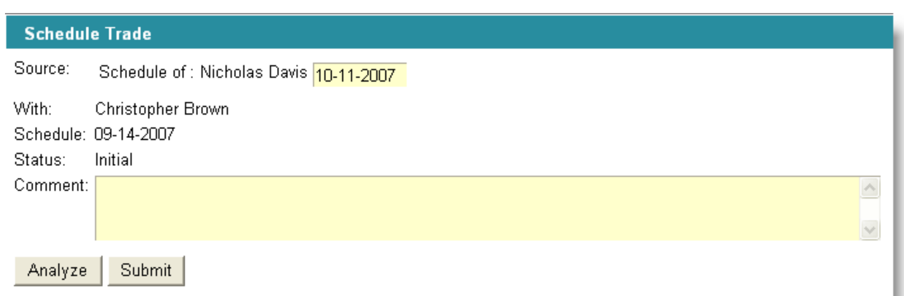
Trade requests appear on the bulletin board. You can accept any trade offer that appears on your bulletin board.

Perform this procedure when you want to accept a trade request 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 21).

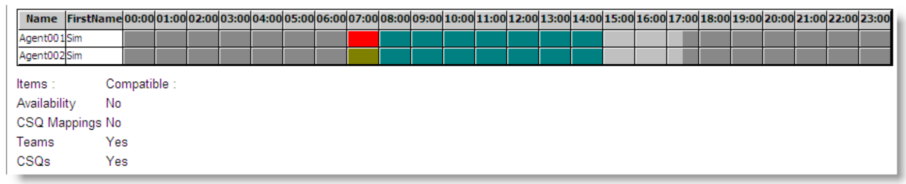
Figure 21. Schedule Trade



2. Enter the date of the schedule you want to offer in the Source field. See "Entering Dates" on page 18 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 22).

Figure 22. Schedule Trade: Analysis



5. Compare the schedules. The default colors are:
   - Dark grey—not available for scheduling
   - Light grey—available for scheduling, but not scheduled
   - Red—exception
   - Blue—working on a project
   - Green—in service
   - Pink—meal time
   - Yellow—break
   - Magenta—on assignment
6. If a Yes appears in the Compatibility column for CSQs or Teams, the two schedules are compatible. Click Submit to send your schedule trade acceptance to the agent with whom you want to trade your schedule.

   On your bulletin board, the accepted trade displays Assigned in the Status field. The accepted trade appears in the administrator's inbox, where the administrator can approve or deny the accepted trade.

Accepting a Schedule Offer

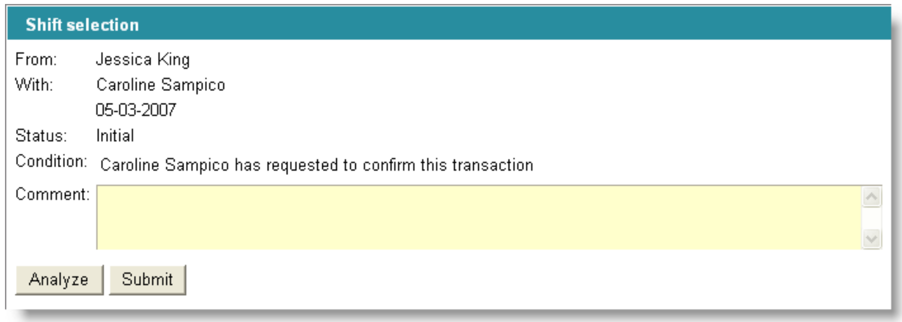
Schedule offers appear on the bulletin board. You can accept any schedule offer that appears on your bulletin board.

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

To accept a schedule offer:

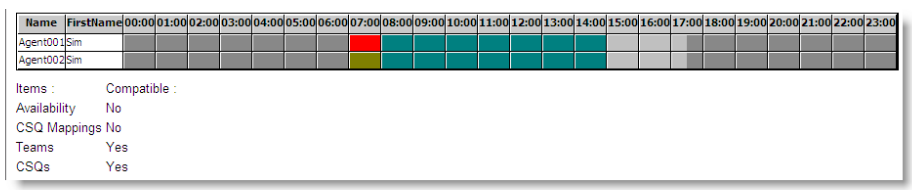
1. From the Bulletin Board pane, click (Accept Offer) next to the schedule offer you want to accept. The Shift Selection pane appears (Figure 23).

Figure 23. 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 24).

Figure 24. Shift Selection: Analysis



4. If a Yes appears in the Compatibility column for CSQs or Teams, the two schedules are compatible. Click Submit to send your schedule offer acceptance.

   On your bulletin board, the accepted schedule offer displays Assigned in the Status field. The accepted schedule offer appears in the administrator’s inbox, where the administrator can approve or deny the accepted offer.

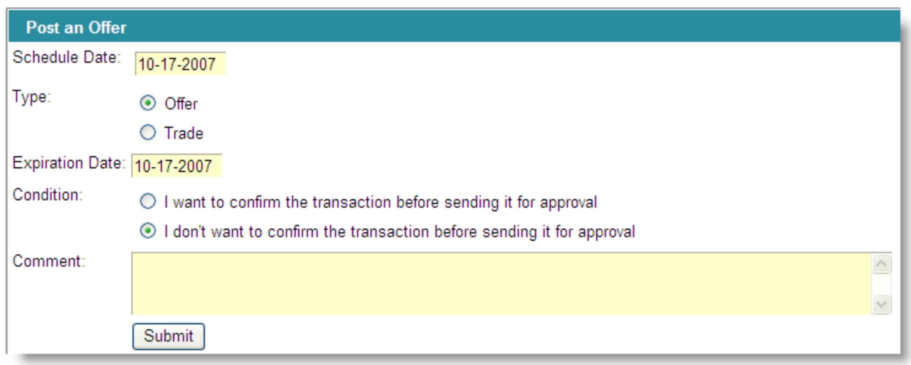
Editing a Schedule Trade or Offer Request

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

To edit a schedule trade or offer request:

1. From the Bulletin Board, click (Edit) in the Actions column next to the schedule trade or offer request you want to edit. The Post an Offer pane appear (Figure 25).

Figure 25. **Post an Offer**



2. Edit the offer or trade as desired.
3. Click Submit to post your edited schedule offer or trade request on the bulletin board.

Deleting a Schedule Trade or Offer Request

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

To delete a schedule trade or offer request:

- From the Bulletin Board, click (Delete) in the Actions column next to the schedule trade or offer request you want to delete. The request is deleted.

Productivity

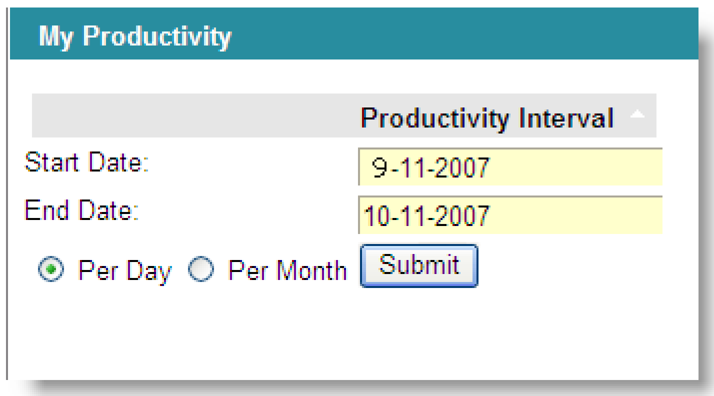
The My Productivity pane allows you to display your productivity by day or month for a specified interval in your productivity dashboard. The data is presented in graphic and tabular formats.

Use this procedure to view your productivity information.

To view your productivity information:

1. From the Navigation tree, choose My Page > Productivity. The My Productivity pane appears (Figure 26).

Figure 26. 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.

   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 My Productivity dashboard (Figure 27 on page 40).

The My Productivity Dashboard

The My Productivity dashboard (Figure 27 on page 40) 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.

The appearance of the My Productivity dashboard can be modified to suit your preferences. See "Customizing Dashboards" on page 14 for more information on modifying the My Productivity dashboard.

Figure 27. My Productivity dashboard

The My Productivity dashboard fields are described below.

Field Name	Description
Start Date	Start date for the statistics interval.
End Date	End date for the statistics interval.
Per Day	Select this option if you want to display your productivity by day.

Field Name	Description
Per Month	Select this option if you want to display your productivity by month.
Average Calls per Hour	Average number of calls answered by you and your team within the selected interval.
Handled Calls	Total number of calls that are answered by you and your team within the selected interval.
Total in Service	Time in seconds spent by you and your team answering calls, performing after-call work and waiting to take calls.
Total Occupancy	Total percentage of logged-in time you and your team spent on active contact handling states (for example, on incoming calls, in wrapup activity, on outbound calls) within the selected interval.
Average Handle Time	Average time in seconds you and your team spent handling contacts to completion, including talk time plus after-contact work time, within the selected interval.
Average Work Time	Average time in seconds you and your team spent completing work after a call is ended or a response to an email is sent that directly relates to the call or email.
Total Occupancy	Displays the percentage of logged-in time that you and your team spent in active contact handling states (inbound calls, wrapup activity, and outbound calls).
Occupancy Ratio	Percentage of time you and your team spent answering customer contacts.

Statistics

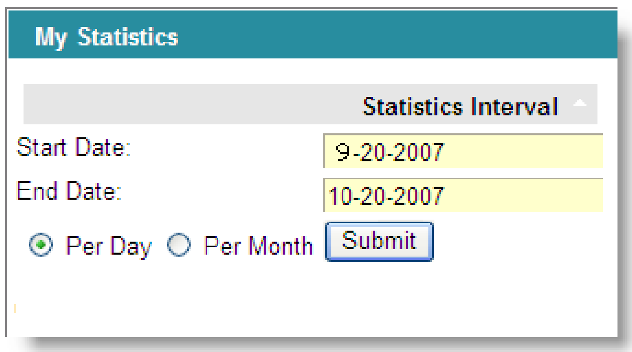
The My Statistics pane allows you to display your statistics by day or by month for a specified interval. The data is presented in tabular format.

Use this procedure to display the My Statistics pane.

To display my statistics:

1. From the Navigation menu, choose My Page > Statistics. The My Statistics pane appears (Figure 28).

Figure 28. My Statistics pane



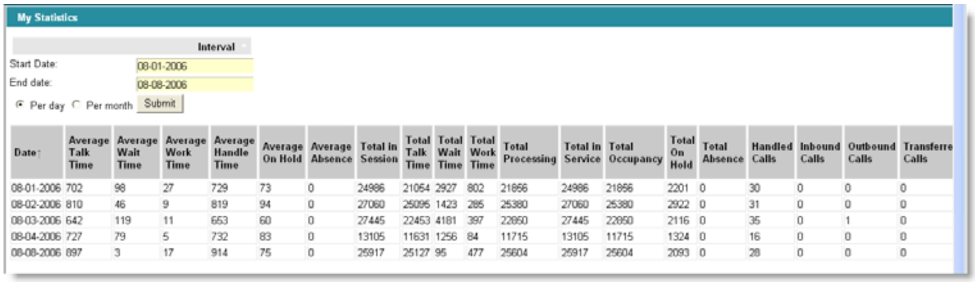
2. To view your statistics for a specific interval, enter the start date and end date for the interval in the Start Date and End Date fields.
3. Select one of the following options:
   - Per Day — Select this option to display your statistics by day.
   - Per Month — Select this option to display your statistics by month.
4. Click Submit to display the My Statistics dashboard (Figure 29 on page 43).

The My Statistics Dashboard

The My Statistics dashboard (Figure 29 on page 43) displays your statistics for the selected interval.

The appearance of the My Statistics dashboard can be modified to suit your preferences. See "Customizing Dashboards" on page 14 for more information on modifying the My Statistics dashboard.

Figure 29. My Statistics



The My Statistics fields are described in the following table.

Field Name	Description
Date	Date associated with the statistics shown. • If you select the Per day view, dates are each day within the selected interval. • If you select the Per month view, dates are the first day in the month.
Average Talk Time	Average elapsed time from when a call is answered to when it is disconnected.
Average Wait Time	Average time spent in Ready state waiting for a call.
Average Work Time	Average time to complete after-contact work directly associated with a completed call or sent email,
Average Handle Time	Average time to handle a contact to completion, including talk time plus after-contact work time.
Average On Hold	Average time a caller remains on hold.
Average Absence	Average time spent in the Not Ready state, unavailable to take calls.
Total in Session	Total time logged in.
Total Talk Time	Total elapsed time from when a call is answered until the call is disconnected.
Total Wait Time	Total time spent in the Ready state waiting for calls.
Total Work Time	Total time to complete after-contact work directly associated with a completed call or sent email,

Field Name	Description
Total Processing	Total processing time spent handling calls, waiting for calls, and completing after-contact work.
Total in Service	Total elapsed time from when you answer a call until you disconnect.
Total Occupancy	Total logged-in time spent in active contact handling states (on inbound and outbound calls and in after-contact work).
Total on Hold	Total time callers spent on hold.
Total Absence	Total time spent in the Ready state, unavailable to take calls.
Handled Calls	Total number of calls answered (not blocked or abandoned).
Inbound Calls	Total number of inbound calls.
Outbound Calls	Total number of outbound calls.
Transferred Calls	Total number of transferred calls.
In Session Ratio	Percentage of time logged in during this schedule period.
Processing Ratio	Percentage of in service time spent handling call or in the Not Ready state.
Occupancy Ratio	Percentage of time spent answering customer contacts.
Average Calls per Hour	Average number of calls handled per hour.
Real-time Adherence	Measurement of how closely the agent adheres to the planned work schedule.
Real-time Conformity	Measurement of how closely the agent conforms to the planned work schedule.

Glossary

4

A

adherence

The term used to describe how well agents stick to their planned work schedules when they arrive, depart, go on break, or take lunch. Also known to as compliance.

agent

The person who handles calls and email in a contact center. Also called a customer service representative or telephone sales representative.

AHT

Average Handle Time. The amount of time it takes on average to handle a contact to completion, including talk time plus after-contact work time. To calculate, divide the total seconds of work time by the number of contacts.

assignment

An assignment is a type of fixed work shift that does not cover requirements. Use this work shift type to schedule agents for non-phone related activities for entire days or weeks. Assign fixed work shifts to senior and full-time agents.

ACW

After Call Work. The average time required by an agent after a conversation is ended or a response to an email is sent, to complete work that is directly associated with the call or email just completed. Does not include time for any activities such as meetings, breaks, or correspondence. Also known as Average Work Time (AWT).

AWT

Average Work Time. Also known as After Call Work (AWC). The average time required by an agent after a conversation is ended or a response to an email is sent, to complete work that is directly associated with the call or email just completed. Does not include time for any activities such as meetings, breaks, or correspondence.

average talk time

The average elapsed time from when an agent answers a call until the agent disconnects.

C

contact

A connection via voice or email from a customer to an agent in the customer contact center.

CSQ

Contact Service Queue. In Unified CCX, a group of agents to which contacts are routed. It is generally associated with a specific skill.

customer service representative

A service representative who handles customer calls and contacts, including account inquiries, complaints, and support calls.

E

email

Electronic Mail. The transmission, electronically, of letters, memos, and messages from one computer to another.

exception

Any unplanned activity in an employee's work schedule, including meetings, training sessions, unscheduled breaks, and absenteeism.

H

handled call

A call that is answered by an employee as opposed to being blocked or abandoned.

handle time

The combination of conversation time and after call work time.

O

occupancy

Generally a percent of logged in time that an agent spends in active contact handling states (for example, on incoming calls, in wrapup activity, or outbound calls).

occupancy ratio

The percentage of time an agent spends answering customer contacts for each interval versus their total time in session.

P

project

A non-routine activity that prevents agents from answering contacts. Projects are generally assigned to optimize agent idle time. These non-routine activities occur each work shift and can be assigned for periods of a day or a week. They can be activities that are internal to the customer contact center efforts, such as answering email and sending faxes.

PTO

Personal time off.

R

real-time adherence

Measurement of how closely agents stick to their planned work schedule. Real-time statistics are available from the ACD to show the current state of any agent; these states can be compared to agent's schedule to determine adherence at any point in time.

S

schedule

A record that specifies when an employee is supposed be on duty to handle contacts. The complete definition of a schedule is the days of week worked, start time, break times and durations (as well as paid/unpaid status), and stop time.

service goal

A definable service objective. For example, answering 80% of calls within the first 20 seconds.

service level or service level objective

A speed of answer goal that is often expressed as a percentage goal for answering calls within a specified number of seconds or email within a specified number of hours. For example, 80% of all calls answered within 20 seconds or 100 percent of email answered within 24 hours. A more demanding quality objective requires a higher staffing level.

An agent makes a shift available to others (for example, when the agent plans to be absent for a day).

shift trade

An agent offers to trade shifts with another agent.

skill

A developed aptitude or ability (for example, speaking a foreign language).

supervisor

A supervisor is usually the person who has first-line responsibility for the management of a group of agents. Often has special telephone or computer terminal for monitoring agents and the system performance.

T

talk time

The elapsed time from when an agent answers a call until the agent disconnects.

team

A group of agents. An agent can belong to many teams. WFM generates reports by team.

U

user

A person who can log into WFM. A user can be linked to an agent identity to take calls.

W

work shift

The hours and days when an agent can work. It includes days, hours, arrival, and departure times.

work shift rotation

A work shift in which an agent works different shifts over a several weeks.

Workforce Management

1. The art and science of having the right number of agents, at the right times, to answer an accurately forecasted volume of incoming calls at the service level standard set by the call center. 2. A Cisco product.

wrapup time

The time required by an agent after a conversation is ended or a response to an email is sent, to complete work that is directly associated with the call just completed. Does not include time for any activities such as meetings, breaks, or correspondence.

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