Genesys 7

GENESYS
AN ALCATEL·LUCENT COMPANY

Workforce Management

Version 7.6

- **About This Software**
- **Documentation**
- **Technical Support**
- **Legal Notices**

Genesys Telecommunications Laboratories, Inc.
2001 Junipero Serra Blvd., Suite 700, Daly City, CA 94014
www.genesyslab.com

About This Software

The Genesys Workforce Management solution is designed to provide contact center managers with the tools they need to better manage their workforce. The product offers the ability to create accurate staffing plans that take into account not only projected contact volumes and average handle times, but also the various skills and skill levels of their agent population. This is achieved through advanced forecasting, scheduling and real-time adherence capabilities.

Genesys Workforce Management has been designed to integrate tightly with the Framework components of the Genesys Customer Interaction Management Platform. Agents and their skill sets are entered and maintained in one Genesys configuration management application, so there is no longer a need to re-enter this information in a stand-alone workforce management application. This integration also allows contact centers to leverage the real-time statistics and adherence data across all communication channels.

Designed for the true multi-media, multi-site environment, Genesys Workforce Management provides optimal schedules across multi-skilled agents who may handle customer interactions of different media types. Agent preferences, skills, proficiency, customer segmentation, historical trends such as e-mail response times, and outbound call lengths are all considered within the forecast, schedule and adherence components.
Genesys Workforce Management consists of the following components:

- WFM Database Utility
- WFM Configuration Utility
- WFM Web (with separate interfaces for Supervisors and Agents)
- WFM Server
- WFM Data Aggregator
- WFM Daemon
- WFM Builder

Workforce Management also requires a database to store all the relevant configuration, forecasting, scheduling, agent adherence, performance, and historical data.

New Features in Release 7.6.x

Workforce Management 7.6.1 includes the following new features:

For Supervisors / Users

- To help with "what if" planning, users can now:
  - View what an optimal mix of shifts would be in a Schedule.
  - Create teams using profile agents, and then build schedules with an unknown number of profiles.
  - Enter a combination of synchronicity rules to be granted when creating schedules, including days off, shift start times, paid duration, meals, and breaks.
- Users can now:
  - Edit and search historical data.
  - Schedule automatic report generation.
  - Adjust call volumes in a Forecast Scenario using percentages
  - Adjust IV stats by configuring WFM to discount short abandons of a specifiable length.
  - Group multiple selected activities from within the same business unit and/or from an independent site.
  - Redistribute call volumes without changing the total call volume for a forecast.
- Users can insert granted calendar items into a schedule scenario for the corresponding scenario dates.
- Events, now renamed *Overlays*, were moved from WFM Configuration Utility to the forecasting area of WFM Web for Supervisors, where they have improved functionality.
- New tenant-based security governs which users can order synchronization and view agent and skill lists.

For Agents

- A new WFM Web Agent view enables agents to view other agent schedules across all sites within the same activity group.
- Agents can now insert certain exceptions into the calendar themselves, and track the number of hours spent on training, coaching, and other activities.
- JAWS compatibility now aids visually-impaired agents.

For Both Supervisors/Users and Agents

- Extensive new Oime off functionality for Supervisors and agents:
  - Agents can view time-off limits across sites before submitting a request.
  - Agents can recall their own time-off requests that are not yet scheduled, including future full-day or partial-day time off.
  - A full-day time-off request can have a specific start/end time.
  - Multi-day time-off requests can be treated as one entity rather than individual days.
  - Users can set and view time-off limits for any multi-site activity that is configured under a business unit.
  - You can use the Calendar module to update the Master Schedule with a granted time -off items, under certain conditions.
  - Supervisors receive e-mail notifications for all time-off requests that have not been scheduled.

The 7.6.0 release of Workforce Manager has the following new features:

- For more efficient security, an administrator can proactively add a Site to users who should have access.
- Contact centers can configure a Default Security Role for new WFM users.
- A supervisor can configure Rotating Patterns to include all Activities, so that when new Activities are added to the system, the Rotating Patterns do not require updating.
- Contact centers can comply with union regulations requiring agents to have a minimum number of hours between start times of consecutive days.
- You can build a schedule with up to 100 shifts configured, making it simpler for contact centers to accommodate the need for schedules with specific break and meal times and durations.
- Contact centers can comply with labor regulations that require all breaks be scheduled, even if they conflict with pre-planned exceptions.
- Contact centers which are legally obliged to build schedules with all agent preferences granted as part of their labor agreement can create schedules with all agent preferences granted.
- You can add the same shift for multiple agents using the Insert Multiple feature in the Intra-day Schedule view, Schedule Agent-Extended Schedule view, and the Weekly Schedule view.
- You can switch off automatic approval of trades to enable a supervisor to review all trades, and better track how agents use the trading feature.
- The Contact Center Performance Report can display Optimal Staffing at both the Activity and Multi-Site Activity levels, and the difference between the Optimal Staffing and the Scheduled Coverage.
- A supervisor can override time-off limits while granting time off, in a single step.
- Agents cannot accidentally request types of time off for which they do not have a time-off rule assigned.
- Users can configure WFM so that a time-off request can be validated against time-off limits, but does not need to be validated against a time-off balance. This configuration is independent of whether the time off is subject to auto-approval rules or not.

Directories on This CD

configuration_wizard
Contains the files necessary to set up and run the Configuration Wizard.

documentation
Contains the ReadMe file, graphics for the ReadMe, and the versions.html file.

solution_specific
Contains the applications that are specific to the solution being installed. Each application is in a separate subfolder, under which are the operating systems that support the application.

templates
Contains the templates used for configuring the component applications and the solution object.

Documentation

Product documents and release notes are available on the Genesys Technical Support website and on a separate documentation library DVD shipped with your software.

Any information regarding this release that was discovered too late to be included in the documentation is available in the [Release Advisory](#).

In addition to an updated library of product documentation, the Genesys Technical Support website also contains product advisories that describe recently discovered issues related to Genesys products.

Technical Support

Contacting

Genesys provides technical support to customers worldwide with support centers in eastern Canada, the United Kingdom, Australia, India, and Japan. You can contact Genesys Technical Support by telephone, e-mail, or on the World Wide Web.

For complete information on how and when to contact Technical Support, read the *Genesys Technical Support Guide*. Please tell the Technical Support representative that you are a Genesys 7.6 Workforce Management customer. For a list of the software versions that are on this CD, click here.

Licensing

Along with its software, Genesys supplies its customers with software licenses. Licenses manifest the customers' legal rights to use the features that Genesys software provides. To obtain the necessary product licenses, you will need to complete an order form, which has detailed information to assist you in placing an order. For complete information on obtaining licenses, refer to the *Genesys Licensing Guide* on the Technical Support website and the licensing section of the *Genesys Migration Guide*.

Configuration Support

Information on supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *Genesys Supported Operating Environment Reference Manual*
- *Genesys Supported Media Interfaces Reference Manual*

Legal Notices

Copyright

This CD and all its contents © Copyright 2009, Genesys Telecommunications Laboratories, Inc. All rights reserved.

Patents

Genesys applications are covered by one or more of the following patents (and non-U.S. equivalents thereof), which are owned or licensed by Genesys Telecommunications Laboratories, Inc.:

4977520; 5103449; 5097528; 5311577; 5402474; 5652866; 6130933; 5802163; 5812644;

Trademarks

Genesys and the Genesys logo are registered trademarks of Genesys Telecommunications Laboratories, Inc., in the U.S.A. and other countries.

All other trademarks are the property of their respective owners.

Third-Party Software

Genesys follows applicable third-party redistribution policies to the extent that Genesys solutions utilize functionality of commercial or non-commercial third parties.

NOTICE OF RESTRICTED RIGHTS FOR ORACLE PRODUCTS LICENSED TO THE US GOVERNMENT Oracle Programs delivered to the United States government subject to the DOD FAR Supplement are 'commercial computer software' and use, duplication, and disclosure of the programs, including documentation, shall be subject to the licensing restrictions set forth in the applicable license agreement therefor. Otherwise, Oracle programs delivered subject to the Federal Acquisition Regulations are 'restricted computer software' and use, duplication, and disclosure of the programs, including documentation, shall be subject to the restrictions in FAR 52.227-19, Commercial Computer Software-Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

Your Responsibility for Your System

You are responsible for product administration and system security. Please prevent unauthorized access. Your system administrator should read all documents provided with this product to fully understand the features available that can reduce the risk of system damage. System damage or loss caused by unauthorized access is not covered by maintenance and support or a Genesys warranty. In addition, Genesys software is proprietary. Unauthorized access may lead to violations of your confidentiality obligations under your contract with Genesys.