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Genesys Engage cloud Workforce Management 8.5.1 Guide

Meetings

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Meetings

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Workforce Management in Genesys Engage cloud.

Use the **Meetings** module to create, edit, delete, or assign attendees to meetings.

Planner vs. Scheduler

Use the **Meeting Planner** (described here) to create and configure meetings that you know about in advance. It is especially useful for recurring team meetings or coaching sessions. Meetings that are created in the **Meeting Planner** are taken as inputs during schedule building.

Use the **Meeting Scheduler** to create ad hoc meetings and insert them into a schedule that has already been built. Access the **Meeting Scheduler** feature in WFM Web Supervisor from within the **Intra-Day Schedule** view or **Agent-Extended Schedule** view.

To create a new meeting:

1. Select the **Policies** tab.
2. Select **Meetings** from the **Views** menu.
3. Select a site or business unit (this action selects all indented sites beneath it) on the **Objects** pane.
4. Select **New** from the **Actions** menu or the **New** icon () on the toolbar.
   A blank line appears near the top of the **Data** pane; the new meeting's name will appear there when you save it
   The lower half of the **Data** pane contains three tabs: **Properties**, **Participants**, **Associated Sites**.
5. Select each tab and complete the form that appears.
6. Click **Save**.

The new meeting appears in the top line of the **Data** pane. Now you can configure it by using the **Properties**, **Participants**, and **Associated Sites** tabs.

Properties Tab

- **Meeting Name**—The name of this meeting, for example, Sales Meeting or Monthly Review. The name must be unique within all sites associated with the meeting.
- **Exception Type**—You can base a meeting on any exception type that is configured for the current site and that has the Exception Can be Used in Meeting Planner option selected. Use the **Exceptions Node in Views** drop-down list to set this option. See Exception Types for details.
- **Date and Recurrence Rules:**
  - **Start Date**—The earliest date on which Scheduler can schedule the meeting. Enter values by typing a date or by using the drop-down calendar.
  - **End Date**—The latest date on which Scheduler can assign the meeting. Select the check box to indicate that there should be a specified end date. If you clear the check box, then the end date is automatically calculated based on the recurrence rules settings you enter. Enter values by typing in a date or by using the drop-down calendar.

    > **Tip**
    >
    > You must set either **Number of Times** or **End Date**. You cannot set both.

  - **Total Hours**—The total meeting hours. When you specify this optional parameter, Scheduler creates as many meetings with the defined duration as necessary, to satisfy the Total Hours requirement.
    For example, if the meeting duration is set to two hours, and the Total Hours is set to six hours, Scheduler generates three two-hour meetings. Scheduler can assign these meetings consecutively.
  - **Number of Times**—If you select Daily or Weekly for the Type, set a value for the number of consecutive days or weeks during which this meeting should be scheduled. If you have set an end date, WFM automatically disables this control and sets this value to `0`.
  - **Recurrence Rule**—Select **No Rule** (default), **Daily**, **Weekly**, or **Monthly**.
  - **Recurs Every**—If the Recurrence Rule is set to **Weekly**, you can set a value in this field that defines how often the meeting should recur. Examples: 1 (every week), 2 (every other week), 3 (every third week).
  - **Days of Week**—The days of the week on which **Scheduler** can assign this meeting.
- **Time and Duration:**
  - **Earliest Start Time**—A proposed time at which Scheduler can assign the meeting to start.
  - **Latest End Time**—A proposed time at which **Scheduler** can assign the meeting to end.
  - **Time Zone**—The time zone to use when displaying any time-related information. Set by default to `local` (current user's time zone.)
  - **Meeting Duration**—The length of time that **Scheduler** should allot for the meeting.
- **Meeting Usage**—Select one of the following three radio buttons, which enable the properties that are associated with them.
  - **Single Agent**—A common activity, such as a webinar, that can occur at the most convenient time for each agent.

- **Single Group**—The default meeting type. Represents a single meeting for all agents who are specified on the **Participants** tab.
  Enter or select the meeting's minimum number of attendees requirement in the **Minimum Percentage of Attendees** box. Set this value to 1% to not require a minimum number of attendees—for example, to schedule a meeting for as many attendees as possible.
- **Multiple Groups**—A common time, but for multiple groups. Enter or select a number in each of the fields below, to specify the group sizes.

Min(imum) Number of Groups	Min(imum) Group Size
Max(imum) Number of Groups	Max(imum) Group Size

Participants Tab

To add agents to a meeting:

1. Select agents in the **Available Agents** pane.

> **Tip**
> Selecting teams, sites, or BUs will select all agents beneath them.

2. Click the **<<** button. The selected agents move to the **Selected Agents** pane.
3. To remove agents from the meeting, select them and click **>>** to move them to the **Available Agents** pane.
4. Click **Save**.

> **Important**
> - The tree structure (BUs, sites, teams) can appear in both panes at once, but the agents inside can appear in only one pane.
> - Only agents from the meeting site are available for selection.
> - When a schedule that includes the meeting time is generated, Scheduler verifies that enough agents are available to satisfy the **Minimum Percentage** requirement and then assigns the meeting exception to the available agents. If too few agents are available, **Scheduler** generates an error message and does not schedule the meeting.

Associated Sites Tab

1. Select the check box of each site to associate with the current meeting.
2. Clear the check box of each site to disassociate from the current meeting.
3. Click **Save**.