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Genesys Engage cloud Workforce Management 8.5.1 Guide

Schedules

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Schedules

> **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.

Get an overview of the Schedule module and related topics in the following sections:

- Using the Schedule Module
- Schedule Security
- About Scheduling
- Profile Scheduling: Creating Schedules Without Agents
- Using the Schedule Scenario View
- Using Other Scenario Views
- Using the Master Schedule Views
- Pending Schedule Changes
- Approving Pending Changes

Before creating a schedule, you should:

1. Configure forecast scenarios.
2. Create, build and publish a staffing forecast for each activity you plan to schedule.

> **Tip**
> A single forecast scenario can contain forecasts for multiple activities.

You can create a schedule before publishing a forecast, but many schedule functions (such as Coverage) will be unavailable.

Using the Schedule Module

The **Schedule** module displays agent schedule information in a variety of tables and graphs.

Use the **Schedule** views to:

- Create schedule scenarios, including profile scenarios, which can be used for Schedule Bidding.
- Build the **Schedule**.
- Publish schedule scenarios to, and extract them from, the Master Schedule.
- View weekly and daily schedules for your scenarios and the **Master Schedule**.
- Evaluate schedule coverage for your scenarios and the **Master Schedule**.
- Revise schedules as circumstances require.
- Create, view, edit, remove, and commit pending schedule changes.
- Assign agents to profile schedules, if your scenario includes them.

Schedule Security

You might have full access to all parts of the **Schedule** module or you might have limited access, depending on the settings configured for your Security Role. See Roles.

If you do not have permission to access certain schedule functions, that functionality is disabled.

About Scheduling

The **Schedule** module helps you make the most efficient use of personnel, enabling you to adjust schedules in real time, as workload or agent availability changes. The **Schedule** module builds optimal schedules based on real agents, incorporating their exceptions and preferences into the scheduling process.

Workforce Management builds optimal schedules within a site’s business constraints.

Constraints include:

- Available resources with required skills.
- Service-level requirements.
- Employment contracts and business policies.
- Agent preferences.

Profile Scheduling: Creating Schedules Without Agents

Profile scheduling enables you to model schedule outcomes without having actual agents.

You can create schedules based on user&mash;defined profiles and then assign agents to the resulting schedules; or you can create schedules using a mix of real and profile agents.

Use profile scheduling whenever you want to create a schedule before you actually hire agents.

1. Use WFM Web to define profiles, which consist of contract working rules and a skill set.
2. Use the **Schedule** module to create schedules, using profiles appropriate to the work and to your anticipated hires.
3. Assign newly hired agents to the open slots in the profile schedules.

> **Tip**
> You must assign real agents to profile schedule slots before you can publish those schedule slots to the **Master Schedule**.

Using the Schedule Scenarios View

The **Scenarios** view enables you to open existing scenarios and work with them. It also enables you to create, edit, or delete schedule scenarios, and to publish them to the **Master Schedule**.

To display the **Scenarios** view:

1. Select **Schedule** from the **Home** menu on the toolbar.
2. Select **Scenarios** from the **Schedule** menu on the toolbar.

Using Other Scenario Views

When you open a scenario, the scenario's name becomes a menu in the toolbar, and an item in the Schedule menu. The following views appear in that menu: Coverage, Weekly, Intra-Day, Agent-Extended, Profiles/Bidding, Summary, and State Group Totals.

To open a view for that scenario, select it from the ***<scenario_name>*** menu.

Opening additional scenarios adds their names to the **Schedule** menu. Use the **Schedule** menu to switch between several open scenarios.

To remove a scenario's views from the displayed lists, close that scenario.

Using the Master Schedule Views

If you have access rights to the **Master Schedule**, then you can select **Master Schedule** from the Schedule menu. **Master Schedule** becomes a menu in the toolbar, from which you can select any of the following **Master Schedule** views: Coverage, Weekly, Intra-Day, Agent-Extended, Summary, State Group Totals and Overtime Requirement. The Changes Approval view is listed only if you have the permission to **Approve Changes** in WFM Web.

To open one of these **Master Schedule** views, select it from the menu.

Pending Schedule Changes

If you do not have security permission to **Approve Changes**, any edits you make to a schedule scenario or the **Master Schedule** are entered as pending. That is, they are visible only to you and do not appear in the publically-visible version of the schedule scenario or the **Master Schedule** until a user who has the **Approve Master Schedule Changes** permission reviews and approves them.

- If you publish a schedule scenario to the **Master Schedule**, pending changes are not published.
- If you extract data from the **Master Schedule** to a scenario, the pending changes do not appear in the scenario.

Approving Pending Changes

There are a number of ways to view and approve or reject pending schedule changes. If the pending changes were created by another user, you can use:

- The Master Schedule Changes Approval view.

If the pending changes were made by you, then you can use:

- The Master Schedule Changes Approval view.
- The Commit/Rollback Multiple Wizard.
- The **Commit** and **Rollback** commands from the shortcut menus in the **Schedule Scenario Intra-Day** view and **Master Schedule Intra-Day** view.
- The auto-commit feature in the Insert Multiple Wizard and the Delete Multiple Wizard.