GENESYS™

Workforce Management Administrator's Guide

New In This Release

5/5/2025

New In This Release

These tabs contains brief descriptions of new features in Genesys Workforce Management (WFM) 8.1.x releases.

New in 8.1.3

Objects and Functionality Moved

Some modules, configuration objects, and functionality that were previously in WFM Configuration Utility have been moved to WFM Web. **See more.. [+]**

See the following topics in the Web for Supervisors Help:

- Configuration > Organization
- Configuration > Activities
- Configuration > Schedule State Groups
- Policies > Shifts
- Policies > Contracts > Site Settings

Improved Controls in the WFM Web Interface

There are many improvements to controls and functionality: **[+]**

- Ability to select several objects and apply simultaneously actions for these objects. For example, by holding down the Control key (on the keyboard) and selecting agents in a list:
  - Add/remove several agents to/from a team simultaneously.
  - Add/remove several agents to/from a site simultaneously.
- Ability to enter search criteria into a Search field to find specific objects in a list and, in some views (such as, list of agents), filter the list, by using Search By: radio buttons.
- Ability to navigate through long lists, by using page navigation controls; First page, Previous page, Next page, Last page.

Agents Can Change Time Zone in WFM Web

In WFM Web for Agents, users can select a time zone, different from the site time zone. If they select a different time zone, the Schedule, Trading, Preferences, and Time-Off modules display information, based on the new (selected) time zone.

New Security Options in Configuration Utility

Three new security options provide precise control of Forecast Publishing. **[+]**
After the database is updated to 8.1.3, these new options can be changed in the
User Security module in Configuration Utility, under:

- Modules > Forecast > Publish > Publish IV to Master Forecast
- Modules > Forecast > Publish > Publish AHT to Master Forecast
- Modules > Forecast > Publish > Publish Staffing to Master Forecast

New Configuration Options in WFM Server Application

The WFM Server Application has the following new configuration options: **[+]**

- The CarryOverTimeout option has been added to the CalendarService configuration section
- The following four options are included in the new ETL configuration section:
  - DaysAhead
  - DaysBack
  - DayChunk
  - ETLTimeout

Connection to Backup Configuration Server

WFM Web, Server, Builder, Daemon, and Data Aggregator can now connect to the Configuration
Server at startup if primary Configuration Server is not available. To implement this feature manually
in WFM 8.1.2, see Connect to Backup Configuration Server.

Restricted Access to Data Aggregator

The ability to restrict or limit access to users who configure and restart Data
Aggregator is implemented with the introduction of a new security option
HideDA_settings. This option enables administrators to hide Data Aggregator
controls. **[+]**
When this functionality is enabled, certain sections and tabs in Configuration
Utility are hidden. By default, it is disabled. For more information about this
feature, see the "Configuration Overview" topic in *Workforce Management
Configuration Utility Help*.

Changes to Order of Tabs

In Configuration Utility, the order of the tabs in the some panes has changed: **[+]**

- Configuration > Activities > Activity tabs are in this order: Skills, Agents, Statistics

(previously, `Skills, Statistics, Agents`)

- `Configuration > Activities > Multi-Site Activities` tabs are in this order: `Associated Activities, Skills, Agents, Statistics` (previously, `Associated Activities, Skills, Statistics, Agents`).

Support for ETL Database

To enable Genesys Info Mart and other third-party reporting applications to easily create reports that incorporate WFM data, a WFM ETL (Extract, Transform and Load) database schema is supported. **[+]**
Once configured, this functionality can obtain Schedule, Adherence, and Performance information from WFM and store it into a documented relational database schema. For more information about this feature, see Setting Up an ETL Database.

Backup-Restore Utility

A new command line Backup-Restore Utility (BRU) is introduced to back up and restore the WFM database. BRU improves on the backup/restore functionality that is provided for earlier releases of WFM Database Utility (DBU), by being much faster and no longer limited to the database backup size of 2 GB.

Web Browsers Supported

- Google Chrome
- Microsoft Internet Explorer, version 10

Databases Supported

- IBM DB2, version 10
- MS SQL Server 2012

Discontinued Support

Support for the following is discontinued:

Platforms: [+]

- WebSphere Application Server 6.x
- Sun Solaris/SPARC 9
- IBM AIX platform 5.3
- Microsoft Windows Server 2003
- Microsoft Windows XP

Databases: [+]

- IBM DB2 version 9.1
- IBM DB2 versions 8.x

Browser: [+]

- Firefox browser versions 4.x

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New in 8.1.2

Effective Date for Contracts

Users can specify an effective start date for a Contract and assign agents to the contract accordingly. The agent can have multiple assigned Contracts, but each one must have a different effective date. **See more.. [+]**

See the Web for Supervisors Help topics:

- Configuration > Agents > Contracts and Rotating Patterns
- Policies > Contracts > Agents

Effective Date for Rotating Patterns

Users can specify an effective start date for a Rotating Pattern, which is the date that the Rotating Pattern becomes effective for the agent. The agent can have multiple assigned Rotating Patterns, but each one must have a different effective date. **[+]**

See the Web for Supervisors Help topics:

- Configuration > Agents > Contracts and Rotating Patterns.
- Policies > Rotating Patterns > Associated Agents

Effective Date for Activities

Users can specify an effective date for activities, which is the start date that the

agent becomes eligible to work on the activity. **[+]**

See the Web for Supervisors Help topic `Configuration > Agents > Activities`.

Automated Time Off Carry Over

Users can set the calculation of Time Off Carry-Over to occur automatically. **[+]**

See the Configuration Utility help topic `Policies > Time Off Rules > Carry-Over Rules` section.

View Web Agent Schedule on Mobile Devices

Agents can log in to WFM Web and view their schedule on their iPhone 4, iOS 5 mobile device. **[+]**

See the Web for Agents Help topic `Getting Started > Overview.` or the Supervisor help topic `Getting Started > Overview.`

Contact Center Performance Report Enhancement

Users can now view forecast-related data in the Contact Center Performance Report and Contact Center Performance Graph Report. **[+]**

See the Web for Supervisors Help topic `Reports > Performance Reports.`

Forecast Splitting by Using Percentages

Users can specify a percentage to allocate volumes from a multi-site activity to each Child (site) activity or apply a template. The interval can be the entire forecast scenario, weekday, or timestep. **[+]**

See the Web for Supervisors Help topic `Forecast > Forecast Scenarios > Volume Split Wizard.`

Forecast Staffing Totals Displayed in FTE or Man Hours

Forecast staffing totals are now displayed in the WFM interface and reports as

Forecast Total Equivalent (FTE) or man hours and are editable in both modes (in views in which totals are editable). **[+]**

See the Web for Supervisors Help topics:

- Forecast > Graph View Options > Graph View Options Staffing
- Schedule > Schedule Scenarios > Scenario Summary View
- Schedule > Master Schedule Views > Master Schedule Summary View
- Schedule > Master Schedule Views > Master Schedule Overtime Requirements View
- Reports > Forecast Reports > Forecast Report and Forecast Graphs Report
- Reports > Performance Reports > Actual Overhead Report
- Reports > Schedule Reports > Schedule Summary Report, Weekly Schedule Coverage Report, and Activity Weekly Schedule Report

MSA Button Always On

Users can now set the Use Multi-Site Activities button to On in any view and it will be set to On in all views, in which this button is available. **[+]**

See the following affected views in Web for Supervisors Help:

- Forecast Volume (Scenario and Master)
- Forecast Staffing (Scenario and Master)
- Forecast Graphs (Scenario and Master)
- Forecast Historical Data Views (Volumes and Graphs)
- Performance Intra-day View
- Performance Monitor
- Schedule Coverage (Scenario and Master)
- Schedule Intra-day, Performance (Scenario and Master)
- Schedule Summary (Scenario and Master)
- Schedule State Group Totals (Scenario and Master)
- Schedule Overtime Requirement (Master)

System Security: Last Log In Timestamp

To improve on system security, an enhancement enables the timestamp information from the previous login to display in the GUI the next time a user

logs in to WFM Web through the Supervisor, Agent, or Agent Mobile interfaces, alerting users of any unauthorized use of their login credentials. **[+]**

See the Web for Supervisors Help topic Getting Started > Logging In and the Agent help topic Getting Started > Logging In.

New WFM Splash Screen

A new splash screen displays when WFM Web is loading the Log In GUI.

Page Limit for Reports

Two new options, PageLimit and PageLimitForCSV can be used to limit the size of generated reports, controlling the maximum number of pages a report can contain and improving performance.

Objects and Functionality Moved

Some modules, configuration objects, and functionality that were previously in WFM Configuration Utility have been moved to WFM Web. **[+]**

See the following topics in the Web for Supervisors Help:

- Policies > Contracts
- Policies > Rotating Patterns
- Configuration > Agents > Activities
- Configuration > Agents > Contracts and Rotating Patterns

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New in 8.1.1

Automated Shrinkage Forecasting

Users can evaluate scheduled shrinkages (overheads) against forecasted shrinkages and can create Overhead Forecast templates from the scheduled overhead data. **See more.. [+]**

See the Web for Supervisors Help topic Schedule > Master Schedule Views >

`Master Schedule State Group Totals` > Actions menu/Toolbar buttons.

Selective Historical Forecasting

Users can specify unique, multiple periods of historical data during the forecast build process to create forecasts that reflect seasonality. This ensures that staffing needs are adequately met. **[+]**

See the Web for Supervisors Help topic `Forecast` > `Forecast Scenarios` > `Volumes Build Wizard` > `Select Historical Data`.

Schedule Audit and Rollback

WFM tracks which parameters were changed in a schedule, and provide an option to go back to a previous schedule (before the change was made).**[+]**

See the Web for Supervisors Help topics:

- `Reports` > `Audit Reports` > `Schedule Audit Report`
- `Schedule` > `Modify Individual Agents' Schedules` > `Modify Individual Agents' Schedules Overview`
- `Schedule` > `Modify Individual Agents' Schedules` > `Schedule History`

Schedules Display With Time Zone Adjustments

Intra-day Schedule View displays time zone offsets in schedules.**[+]**

See the Web for Supervisors Help topic `Intra-day Schedule View`.

Automated Time Off Wait List

WFM can automatically grant Time Off to requestors on the wait-list (based on their position in the queue) and can automatically insert valid Time Off Requests into the Master Schedule. Additionally, agents can now see their own position in the queue.**[+]**

See the Web for Agents Help topics:

- `Time Off > Requesting Time Off`

- `Time Off > Time Off > Recalling a Time Off Request`

- `Time Off > Deleting Time Off`

See also, the Administrator's Guide sections:

- WFM Server Options, see the `AutoPublishTimeOffToSchedule` configuration option in the `CalendarService` section

- Enabling and Configuring Wait-list Functionality

Exception Management

Users can select a specified item (such as an Exception) and find all items like it for a selected agent or agents—and then make a bulk edit or change.**[+]**

See the Web for Supervisors Help topic `Schedule > Insert Multiple Wizard > Select Exception Screen`.

Microsoft SQL Database Replication

WFM now supports peer-to-peer transactional replication of all database tables between all locations, which provides MS SQL database users with an alternative to deploying terminal services when the server is not located near the database.**[+]**

See MS SQL Database Replication.

Miscellaneous Modifications

- You can click the Current Whole Day (Today) button to display data for the current day in the Master Schedule Intra-Day view. **[+]**

  See the Supervisor help topic: `Schedule > Master Schedule Views > Master Schedule Intra-Day View > Master Schedule Intra-Day View Overview`.

- Government agencies and other corporations can now comply with Handicap Accessibility Regulations. Accessibility for the blind, color blind, and users of limited mobility was improved to the WFM Web for Supervisors module. **[+]**

  See the Supervisor help topic `About WFM Web`.

- Employee ID was added to these reports: Schedule States, Individual Schedule, and Weekly Schedule. **[+]**

See the Supervisor help topics Reports > Schedule Reports > Individual Schedule Report, Schedule States Report, and Weekly Schedule Report.

- Platform support changes are detailed in the *Genesys Supported Operating Environment Reference Manual*. Below is a summary:

  - Discontinued OS support: IBM AIX 5.1 and 5.2, 32- and 64-bit versions.

  - Added support of web browser Microsoft IE9.

  - Terminal servers WFM DB and Config Utilities added support for Citrix XenApp version 6 (Platinum Edition).

  - WFM Web Server support limited to Red Hat Enterprise Linux, version 6 and IBM WebSphere Application Server, version 8.

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New in 8.1

Shared Transport

WFM now supports the ability to group agents who share transportation (such as carpools or service buses) by building schedules that allow these agents to start and leave at the same time. Agents Supervisors, and Administrators can create new shared transportation groups as well as joining or removing existing ones. Supervisors and Administrators can also switch the scheduling of these groups on and off during the schedule build process. **See more.. [+]**

For detailed information, see:

- Web for Agents Help topic Shared Transport

- Web for Supervisors Help topic Configuration > Configure Shared Transportation, Schedule > Intra-Day Schedule Rebuild Wizard > Shared Transportation Constraints

- Configuration Utility Help topic Configuration > User Security > Security Options > Configuration Security Options

- WFM Web Options, the AllowAccessToCarpools configuration option in the AgentSchedule section.

Simultaneous Scheduling of Deferred Work Activities

The forecasting algorithm for deferred work activities is enhanced so users can optimize the way that Deferred Activities are processed at an interval level, without impacting service levels for Immediate Activities. This facilitates the user's ability to address unplanned staffing variances and make better use of the

available resources.**[+]**

For detailed information, see:

- Web for Supervisors Help topic Forecast > `Forecast Scenarios, Staffing Build Wizard,` and `Volumes Split Wizard`
- Configuration Utility Help topic Configuration > `Activities > Statistics Configuration for Activities`

E-mail Notifications Enhancements

WFM now provides a security option that controls which WFM Web Supervisor receives e-mail notifications regarding an Agent's Time Off balance. These notifications will be sent when a Time Off change is made in the calendar or schedule.**[+]**

For detailed information see the Configuration Utility Help topic `Configuration > User Security > Security Options > Notification Options`

Build Schedule Scenarios based on Forecast Scenarios

Now you can build a "test" schedule based on a forecast scenario. **[+]**

For detailed information see the Web for Supervisors Help topic `Schedule > Schedule Scenarios > New Scenario Wizard`

Working Rules/Scheduling Constraints

It is now possible to define in the Contract the maximum amount of Sundays that can be worked at a given site. Users can select both the `Minimum Duration Between the Start Times of Two Consecutive Working Days` and the `Minimum Duration Between the End of One Day and Start of Next Working Day.` **[+]**

For detailed information see the Configuration Utility Help topic `Policies > Contracts > Contracts Overview, Contract Constraints, Contract Weekend Rules,` and `Contract Synchronization.`

= Print Schedule Without Relying on the Browser

Agents can print a schedule without relying on the print functionality of their browsers. **[+]**

For detailed information see the Web for Agents Help topic `Schedule > My Schedule Tab Overview.`

Estimate Time Off Limits Wizard

Time Off Limits will now take into account the total number of agents that may take time off, along with the start/end of contract availability, the earliest stat/end times of shifts assigned to the contract (including week days) and Activity open hours for which the agent is skilled to work. These constraints optionally include Rotating Patterns and Granted Calendar items. **[+]**

For detailed information see the WFM for Supervisors Help topic `Calendar Module > Time-Off Limits > Set Time Off Limits Wizard.`

Accessibility

Enhancements to the WFM Web Agent and Supervisor interfaces allow corporations to comply with Handicap Accessibility regulations. These include not using color to display statuses, tabulation enhancements to provide focus to a visible control point, the ability to skip navigation links when using a screen reader, allowing agents to change the visual representation of the OS, and ensuring that all frames have titles.

Operating Systems Supported

- IBM AIX, 64-bit, version 7.1
- Microsoft Windows Server 2003, x64
- Microsoft Windows Server 2008 R2 Standard, x64
- Microsoft Windows 7, x32 and x64
- Support discontinued for Microsoft Windows Server 2000, x32

Databases Supported

- DB2 9.7
- Microsoft SQL Server 2008

System Platforms Supported

- Native support of 64-bit executables on MS Windows 2008 R2 for WFM Server, Builder, Daemon, Data Aggregator
- VSphere 4 Hypervisor virtual platform

System Protocols

- Protocol IP v6 supported for WFM Server, Builder, Daemon, Data Aggregator, Database Utility, Configuration Utility, and Web.

System Security (*Radius meta-message display*)

Application end users can now see any meta-text that is associated with successful authentication attempts to a Radius server. Supported for Database Utility, Configuration Utility, and Web.

System Secure Data Storage

- Encryption support for data stored in Oracle 11g or MS SQL Server 2008.

Secure Connections

- Secure communications (SSL/TLS) between all WFM components, and between WFM and Genesys components. Supported for WFM Server, Builder, Daemon, DA, DBU, CU, and Web.

For a complete list of all databases and operating systems supported by Genesys, see the *Genesys Supported Operating Environment Reference Manual*.

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