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# Workforce Management Administrator's Guide

WFM Policy Objects

# WFM Policy Objects

Contractual obligations, legal requirements, and business practices comprise constraints under which a contact center operates. Workforce Management (WFM) enables you to use Policy objects to specify constraints in great detail, resulting in forecasts and schedules that comply with constraints while optimizing staffing levels.

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## Time-Off Rules

The *Time-Off Rules* module enables you to set allocation parameters for both accrued and awarded time-off types. Constraints include the number of hours that are assigned per year or that accumulate per working period, and the carry-over date for each time-off type you use, and whether time-off requests can be auto-approved.

Each type of time off can be associated with one or more time-off rules. Because you can configure a number of time-off types (using the WFM Configuration Utility Time-Off Types module), you can have time off accumulate at different rates, providing more flexibility in managing contact-center staff.

You also use this module to assign time-off rules to specific agents. Agents can have multiple time-off rules assigned, each with its own time-off type.

## Configure Time Off Rules

To learn how to create and configure Time Off rules, see the topic [Policies > Time-Off Rules](#) in *WFM Configuration Utility Help*.

## Activity Policies

The *Activities* module enables you to set activity open hours and staffing constraints. You can also use it to create activity sets (previously called exclusivity sets).

Activity sets provide a means to combine activities into groups for multi-skilled scheduling. Activity sets are associated with sites. Any agent can work on an activity set if that agent has the skills required for the activities included in the activity set. When performing activity set work, agents must perform only the activities included in the set for a specified period of time.

When planning your deployment, consider which activities could logically be grouped into activity sets.

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## Contracts

Contracts are sets of rules that describe the contact center's contractual obligations to agents. The maximum working hours for a contract should include allowances for meetings, training, overtime, and other planned, paid activities. You can configure an unlimited number of contracts. In some cases a unique contract might be necessary for each agent.

Use contracts to describe a single agent's availability. For example, a student might prefer to work Monday, Wednesday, and Friday evenings, any time Tuesday and Thursday, and have weekends off for study and fun. You could configure this student's contract to enable these availability parameters.

A contract is not the same as a shift. A shift indicates the hours an agent *will* work, whereas a contract describes how many hours an agent *should* work. For further details on shifts, see [Shifts](#).

## Constraints for Working Days, Hours, and Days Off

You can set the numbers of working days and hours and days off for one of several scheduling periods, depending on which best suit your enterprise's business practices and any applicable legal requirements. You can set these parameters per week, per month, or per any period of 2 to 6 weeks.

For example, you can ensure that employees always receive 2 weekends off per month or work an exactly specified number of hours per 6-week period.

## Configuring Profiles

A *profile* is an abstract or hypothetical agent constructed from user-defined contract data. You can create multiple profile types, which you can use to construct schedules containing empty schedule slots appropriate for the contracts you have or intend to hire for. You can insert actual agents into the schedule slots after you build the schedule.

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## Shifts

The method used to create WFM shifts allows for a flexible description of shift durations and of start and end times. Additionally, WFM schedules use flexible break and meal parameters.

In a sense, a WFM shift is an abstraction, representing countless possible working times, even though you can configure a shift to produce very regular, fixed, agent schedules.

A single WFM shift can incorporate hundreds of possible start times and durations as long as they fall within the parameters of the contract. However, through more rigid shift configuration, agent start times and workday durations can be fixed. This combination of flexibility and structure makes the WFM shift a tremendously powerful scheduling mechanism. In fact, in some cases, you can configure an entire contact center using only a few WFM shifts.

## Allocating WFM Shifts Effectively

The WFM shift contrasts sharply with the conventional notion of a shift, with fixed weekly start time, fixed duration, and set breaks. You can configure shifts to work in tandem with contracts, which efficiently and effectively controls the placement of working times.

For example, consider a contact center with a standard full-time shift of 8 hours a day, 5 days a week, and an alternative full-time shift of 10 hours a day, 4 days a week. Both types of agents can use a single shift with a flexible duration of 8–10 hours per day. In either case, the agents are contracted to receive 40 hours work each week and to work 4 or 5 days. You can configure WFM to guarantee that specific agents work 4 or 5 days a week, or you can leave it to the WFM Scheduler to determine how many agents of each full-time type should be used to provide the least costly schedule.

Such an efficient method of shift allocation allows you to take into account the effect of complex scheduling requirements and agent-centric considerations, while making the best possible use of multi-skilled agents.

If you have a need in your contact center for more precise control over when an agent works and the duration of his workday, you may consider using Rotating Patterns. This is a way to lock in specific types of schedules for an agent without creating a unique shift for him.

## Exception Types

*Exception types* define periods of time when agents are engaged in non-work activities, such as training or meetings. Each site configures its own set of exception types based on its business requirements. You can configure exceptions to be considered during Meeting Planner use, to be convertible to a day off, and so on. You can assign agents to multiple partial-day exceptions if the exceptions do not overlap.

Because you can group agents into teams, you can assign exceptions to large groups of agents at one time.

### Important

Genesys recommends that you make use of the time-off capabilities introduced in 8.x releases, rather than configuring time off using exception types.

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## Meetings

Use the *Meetings* module to create meetings and assign them to agents. You can set up a series of recurring meetings that must meet your constraints for frequency, number of occurrences, and so on.

Use the Meeting Planner in the WFM Configuration Utility to configure preplanned meetings such as team meetings that recur weekly or monthly. If you need to create an ad hoc meeting, use the Meeting Scheduler within the WFM Web for Supervisors Application.

## Time Off Types

Use this module to create time-off types for each type of time off that you want to be able to track.

Time-off types can be accrued (time off accumulates over time) or awarded (the total amount of time off for the year is assigned at a single time). For example, you might want personal time off to accumulate, whereas holidays—since there is a fixed number during the year—can be awarded.

You can associate multiple time-off rules with a single time-off type. This enables you to have different time-off types accumulate at different rates. For example, you can set different time-off rules for different levels of seniority.

## Marked Time

By configuring *marked-time* types, you can specify periods of time that you want to monitor and report on that are not already labeled using an existing category. For example, you might want to mark the periods that agents worked on a particular project. Or you can mark overtime so that you can report on it.

You can insert and view marked time in the Schedule Intra-Day views. Two new reports, the Schedule Marked Time Report and the Schedule Marked Time Totals Report, display marked time statistics.

## Rotating Patterns

Rotating patterns increase scheduling flexibility and control. A *rotating pattern* is a series of weekly

patterns arranged in a repeating sequence. You construct each weekly pattern from a combination of shift assignments, agent availability times, days off, and so on, depending on what constraint is most important for any specific day.

Rotating patterns include availability times as options for weekly pattern days. If used, these availability settings override the availability settings that you configured in the Contract module for that day. Rotating pattern assignments are displayed in the Calendar along with all other pre-planned data.

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