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# Workforce Management Administrator's Guide

Troubleshooting Your WFM Configuration

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# Troubleshooting Your WFM Configuration

To troubleshoot your Workforce Management configuration, click any of the following topics to find suggestions for resolutions to specific issues:

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## Inaccurate Actual Headcount for Multi-Site Activities and Activity Groups

The algorithms used in the Performance subsystem, Daily Average Actual Headcount for Multi-Site Activities (MSA), Activity Group (AG), and Site Activities have changed from the algorithm used in WFM 8.0 and earlier releases.

### Function of the Algorithm

In prior releases, the Actual Headcount algorithm for MSA and AG levels tended to produce inaccurate Actual Headcount in configurations that included multi-skilled agents, or schedules and MSA or AG configured for more than one Associated Activity from the same site.

This issue is resolved by using the new algorithm (introduced in 8.1), that produces accurate Actual

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Headcount for MSA and Activity Groups. It includes the following important changes to the Actual Headcount timestep and Daily Average algorithms:

1. Dedicated for MSA and AG levels, Data Aggregator aggregates the Actual Headcount separate from the Associated Activities Actual Headcount.
2. MSA level Daily Average Actual Headcount algorithm takes into account the MSA and Associated Activities open hours.
3. Site Activity level Average Actual Headcount algorithm takes into account the Activity open hours.
4. Agent Minutes (<agent adherent minutes> divided by 15) Headcount algorithm is used instead of LoggedIn Agents Headcount.

**Example:** If 1 agent is logged in (adherent), but works only 14 minutes per-timestep, the Actual Headcount in Agent Minutes equals  $14/15 = 0.93$ .

### Calculations Model for Multi-Site Activities Level

In the WFM Performance subsystem, Multi-Site Activity (MSA) Actual Headcount Daily Average is calculated in the following ways, depending on the state of the Multi-Site Activities button:

#### **When the Use Multi-Site Activities button is set to ON:**

- The Actual Headcount Daily Average is calculated by using MSA open hours and MSA per-timestep Actual Headcount data.
- If any timesteps outside MSA open hours contain non-zero values, WFM includes the values for these timesteps in the Actual Headcount Daily Average calculations.
- The Actual Headcount is calculated by using the Agents Minutes algorithm (see item 4 above).

#### **When the Use Multi-Site Activities button is set to OFF:**

- The Actual Headcount Daily Average is calculated, by using the Associated Activities open hours and the sum of the Associated Activities per-timestep Actual Headcount data.
- If any timesteps outside the Associated Activities open hours contain non-zero values, WFM includes the values for these timesteps in the Multi-Site Activity Actual Headcount Daily Average calculations.
- The Actual Headcount is calculated, by using the Agents Minutes algorithm (see item 4 above).

### Calculations for Activity Group Level

In the WFM Performance subsystem, Activity Group Actual Headcount Daily Average is calculated in the following way:

- The Actual Headcount Daily Average is calculated, by using the Associated Activities Actual Headcount data per-timestep for entire day.
- The Actual Headcount is calculated by using the Agents Minutes algorithm (see item 4 above).

### Calculations for Site Activity Level

In the WFM Performance subsystem, Site Activity Actual Headcount Daily Average is calculated in the

following way:

- The Actual Headcount Daily Average is calculated, by using Activity open hours and the Activity per-timestep Actual Headcount data.
- If any timesteps outside of the Activity open hours contain non-zero values, WFM includes the values for these timesteps in the Activity Actual Headcount Daily Average algorithms.
- The Actual Headcount is calculated by using the Agents Minutes algorithm (see item 4 in Overview).

### Important

In releases prior to 8.1, open hours were not taken into account for MSA and Site Activities Daily Average algorithms. WFM used the Associated Activities Actual Headcount data from timesteps for the entire day for Multi-Site Activity Actual Headcount Daily Average algorithms, whether or not the Use Multi-Site Activities button was set to ON or OFF.

## Performance Reports

Performance reports (by default) show the Actual Headcount, based on the LoggedIn Agents that are collected by Data Aggregator, while Performance Intra-Day displays the Actual Headcount, based on Agents Minutes (see item 4 above).

To change the Performance reports Actual Headcount calculation to Agent Minutes (to match Performance Intra-Day calculation), the WFM Web Application option ShowActualHeadcount in the Reports section must be set to true.

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## Performance Shows No Intra-Day Statistics

If the WFM Web Performance subsystem does not display statistics for Interaction Volume, Average Handling Time, Service Level, and other key Intra-Day statistics, verify that:

- WFM Data Aggregator has initialized successfully; has made successful connections to Configuration Server, Stat Server, and the WFM database; and has been running for 30 minutes.
- A schedule has been published for the current time interval.
- The correct Stat Server name appears in the **Configuration > Organization > Sites > Configuration** pane in WFM Web for Supervisors.
- The necessary statistics are configured in the **Configuration > Activities > Statistics** in WFM Web for Supervisors.
- Time zones are configured correctly for the business unit or site.
- The statistics are monitoring the correct Genesys objects, such as queues, routing points, and so on.
- The TimeProfile parameter is correctly configured in Stat Server.

## Headings Do Not Match Columns in Exported Reports

When you export the reports, select the MS Excel Tabular option.

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## Real-Time Agent Adherence Is Not Working Correctly

If the Real-Time Agent Adherence window is empty, then verify that:

- A schedule has been published for the current time interval.
- You have associated the correct WFM Data Aggregator name with the site that contains the agents you are looking at in the WFM Web for Supervisors.
- You have configured a connection to the appropriate Stat Server in the WFM Data Aggregator Application object.
- Your WFM Data Aggregator Application object specifies a connection to your WFM Server on the Connections tab.
- T-Server, Stat Server, and WFM Data Aggregator are running properly.
- Stat Server is configured to connect to the appropriate T-Server.

### Important

If there are no agent names visible in the Real-Time Agent Adherence window, publish a schedule for the current day.

## Agents Are Not Being Scheduled

Verify that:

- The agents' hire dates are not the same as the current date and come before the start of the schedule period.
- The agents are associated with a Contract that can be scheduled.
- The agents' Contract is not associated with shifts that are incorrectly configured, preventing the agents who is in that Contract from being given any shifts.
- The agents have skills configured.
- The agents have skills that qualify for at least one of the activities you are scheduling.

## Calculation of Average Handling Time Based on **TotalTime** Statistics

Average Handling Time (AHT) is calculated by taking the total duration of all interactions that are completed during a timestep, divided by the total number of interactions handled during that timestep.

In cases where Total Handle Time is collected for an interval, but no interactions have been handled in that interval, WFM can optionally associate the Handle Time with the previous interval. To enable this feature, use the `HandleTimeWriteBack` configuration option. See the [Options Section](#) in [WFM Data Aggregator Options](#).

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## Cannot Find Agents or Sites

Verify that:

- WFM is synchronized with Configuration Server.
- The WFM user experiencing this issue has permission to view the site, agents, and logins for the missing sites and/or agents.

## Errors or Warnings When Creating a Schedule

In most cases, when schedule results are not as expected, a configuration error is the cause. With a valid configuration, you rarely see errors.

If the configuration settings lead to a disparity between the staffing requirements and the actual schedule, the `Schedule Validation` window records the problems. Sometimes it indicates which parameters you must change to correct the disparity.

When schedule validation warnings appear, it is essential to begin narrowing down the scope of the scheduling problem by isolating a single agent, team, contract, shift, or other object until the problematic configuration point is identified and resolved. The most frequent causes of schedule errors and warnings include:

- Incompatibility between day-off constraints and constraints set for weekly hours or schedule planning period hours.
- Incorrectly configured meal and shifts constraints.
- Exceptions inconsistent with contract or rotating pattern constraints.

If you are unsure how to troubleshoot the schedule results or are reluctant to change WFM configuration data, contact Genesys Customer Care.

## Data on Active Interactions Disappears

If you close WFM Data Aggregator using the Windows NT Task Manager, you will lose all data on currently active interactions, because Windows NT does not allow enough time for WFM Data Aggregator to save the active data.

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## Forecast Appears Inaccurate

Verify that:

- The statistics being used to collect data for each activity are appropriate.
- The Genesys objects (queues, routing points, and so on) used to monitor statistics are appropriate.
- The Genesys objects are not combining data for interactions that should be associated with different activities. For example, if multiple interaction types are coming through a single routing point, then attached data must be used to filter statistics by interaction type.
- There is no historical data with null values in the WFM historical data table `wm_perf_activities.wm_callvol`. You can verify this by exporting the historical data to a local file using WFM Web for Supervisors.
- You have a sufficient quantity of historical data for the forecasting method you are using. The Expert Average Engine requires one full week of historical data and the Universal Modeling Engine requires at least one year of historical data.

## Schedules Are Highly Over- or Understaffed

Verify that:

- The schedule was built after a forecast was published.
- There is sufficient flexibility in the working hours constraints for the agents' weekly and schedule-planning periods, configured in the Contracts module.
- There is sufficient flexibility in the working days constraints.
- There is sufficient flexibility in the weekend day-off rules for the schedule-planning period.
- The agents' contract availability is flexible enough to cover the open hours for the desired activities.
- Team constraints are not enabled or are configured with enough flexibility to adequately cover the entire day's interaction volumes.
- All shifts have valid configurations.
- All scheduled agents have received the correct number of weekly and/or schedule-planning period hours. If they haven't, this indicates a configuration error.

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