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Workforce Management Administrator's Guide

Monitoring Workforce Performance and Adherence

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Monitoring Workforce Performance and Adherence

Workforce Management (WFM) provides the tools, described in this topic, to help you can monitor the performance and adherence in your workforce environment. You can generate Performance and Adherence reports, enabling you to analyze data and spot trends that might be developing over time. These reports and many others provided by WFM, are described in this topic. See the following sections:

- [Performance](#)
- [Adherence](#)
- [Reports](#)

Performance

The Performance modules compare the forecast and schedule to what is actually happening in the contact center. WFM shows intra-day statistics, such as interaction volume, average handling time (AHT), agents logged in, service level, average speed of answer (ASA), and abandons, and compares them to the planned values.

Intra-day contact center performance data is displayed in an informative and easy-to-read format, enabling efficient performance monitoring and quick response to unanticipated interaction flow or agent-staffing situations.

WFM also provides a “what-if” calculator as an aid to decision making. You can enter new values for staffing, interaction volume, and/or other performance statistics into the What - If window. The what-if calculator then supplies the results to be expected if the values change as you project.

See also, [Contact Center Performance Report Metrics](#).

Adherence

Workforce Management provides real-time agent-adherence data, which compares the current agent status to the scheduled status. WFM can track agent adherence per time interval on a single channel or across multiple channels simultaneously.

Agents who are not adhering to their schedules (within user-defined thresholds) are highlighted in yellow if they are nonadherent or in red if they are severely nonadherent. WFM also displays the amount of time, in minutes, that the agent’s current status has differed from the scheduled status. This running total is continually updated.

Multi-Channel Adherence

To enable tracking of multi-channel adherence in WFM Web, assign a media channel to a Schedule State Group; WFM then calculates adherence by comparing real-time states to the scheduled states for that channel. See the example in [Use Case 1: Multi-Channel Adherence](#).

Use Case 1: Multi-Channel Adherence

A site in the contact center has voice and email related activities, and agents can make outbound calls, which are scheduled as exceptions. The schedule state groups can be configured as follows:

Schedule state group	Channel	Schedule state	Real-time state
Inbound calls	Voice/unspecified	All (immediate) voice-related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Outbound calls	Voice/unspecified	Exception types that represent outbound call work	WaitForNextCall, CallRinging, AfterCallWork, CallOutbound
E-mail	<channel_name> (for example, email)	Deferred, email related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Overhead	None (no channel)	Breaks, meals, time off, exceptions, etc.	NotReadyForTheNextCall, LoggedOut

If WFM is tracking multi-channel adherence (new in WFM 8.5), and there are no Schedule State Groups with a channel name under the Site, WFM calculates adherence as it would for a single agent real-time state, and Stat Server aggregates the statistics as it did prior to 8.5. However, if there is at least one Schedule State Group with a configured channel name, WFM tracks multiple channels. For each Site, WFM tracks as many different channels as there are distinct channel names for all Schedule State Groups under the Site.

For information about how to configure multi-channel adherence, see the topic [Configuration > Schedule State Groups > Configuring Adherence Rules > Configuring Media Channels for Schedule State Groups](#) in the [Workforce Management Web for Supervisors Help](#).

For information about WFM adherence calculations, see [How WFM Calculates Adherence](#).

Important

After updating to 8.5, if any site in your environment supports multiple media channels and you have configured Schedule State Groups to a setting other than None, the Agent Adherence Report includes data that differs from the data in WFM 8.1.3 in two ways:

1. For any given set of criteria (site/timezone/agent/date), the data in the 8.5 report is different than the data in the 8.1.3 report, because the adherence rules change when

you add multi-channel settings to Schedule State Groups, which means the adherence percentages also changes.

2. The Schedule State, Agent State, Start Time, End Time columns are in reverse order. In 8.5, the report displays the columns in this order: Start Time, End Time, Schedule State, Agent State.

Using Reason Codes

WFM enables you to enter reason (aux) codes when you configure agent-adherence rules. The reason codes are linked to Genesys Agent States and add additional details to the state information. The Genesys state + reason code combination is mapped to WFM Scheduled State Groups and is displayed in Adherence views.

Tip

When you filter on user-defined reason codes in the Adherence Filter dialog, the reason code that you specify must not contain any spaces within or at the end of the key value.

For example, an agent might signal that she is in a NotReady state. By adding a reason code, she can specify that she is doing after-call work or answering email. This detailed information then appears in the WFM Web Adherence Details view and agent-adherence reports.

To use reason codes, your switch must support them. See your T-Server documentation to find out whether your switch can include reason codes when it sends Genesys TEvents.

See also, [Agent Adherence Report Metrics and End Notes](#)

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Reports

WFM Web for Supervisors provides access to a variety of reports that are designed to present key contact center data in a flexible and accessible format. The report types are:

- Configuration Reports—Contain information about work activity configuration.
- Policies Reports—Contain information about agents, contracts, shifts, and rotating patterns.
- Calendar Reports—Contain information about time off and agent calendar items.
- Forecast Reports—Display forecast interaction volumes, AHT, and staffing requirements in tabular and graph formats.

- **Schedule Reports**—Display schedule data for agents, activities, teams, sites, multi-site activities, and business units at various granularities. Also present budget information and schedule validation warnings and errors.
- **Performance Reports**—Contain various types of contact center performance statistics in detailed and summary formats.
- **Adherence Reports**—Contain agent-adherence information for agents, teams, sites, business units, and the enterprise.
- **Audit Reports**—Contain information that enables you to audit a history of changes made within the Calendar subsystem and a history of changes made to the Master Schedule.

For more information about Workforce Management report data and other metrics, see [WFM Metrics](#)

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