Workforce Management Web for Agents Help (Classic)

Recently Asked Questions

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Recently Asked Questions

This article contains recently asked questions (RAQ) that might be helpful if you cannot find what you are looking for or have questions similar to those you'll find here. If you still have questions after reading this page, contact us by using the Disqus commenting feature at the bottom of each page.

We've also included information about things you cannot do.

Click the plus sign (+) beside any question to see the answer.

Time Off

[+] How do I check my available paid time off (PTO) balance?

Everything you need to know about your time-off balance can be found on the **Balance** view in the interface (click **Time Off** at the top of the interface to open this view).

You might also find this topic helpful: Balance Pane, which describes each time-off type balance. Specifically, see the row that describes Balances.

[+] How do I calculate my PTO balance after booking future PTO?

You don't have to calculate it, because WFM does this for you. Everything you need to know about your time-off balance can be found on the **Balance** view in the interface (click **Time Off** at the top of the interface to open this view).

You might also find this topic helpful: Balance Pane, which describes each time-off type balance. Specifically, see the row that describes Balances.

[+] How do I recall or delete time-off requests that I entered for dates in the past?

Agents can delete time-off requests for dates that occur in the past, but cannot recall time-off requests. See Deleting Time-Off Requests, which describes how to remove or delete time-off in the Calendar. If you are unable to delete the time-off request in the Calendar, ask your supervisor to remove it for you.

Note that time-off requests that are not scheduled, do not affect time-off balances.

[+] Where can I find a history of changes to my time-off?

You can see your time-off in the 12-month calendar for any day in the present or past. The calendar shows time-off requests in their current status. Days for which you have time-off requests are shown in color. The color changes, depending of the status of the request.

To see any existing time-off information in the Calendar for a particular day, hover the cursor over that day's cell. A pop-up window displays all the time-off information that exists for that day. It can include the date, name, start/end time, status, reason, and comments for the request.

If email notifications are used in your contact center, you would have received one every time your status changed, enabling you to save a history of changes to your time-off requests. If you are not receiving email notifications, ask your supervisor if they are used in your center.

[+] Where can I find credits for a ''day in lieu of''?

WFM does not indicate days off in lieu of days/hours worked, and time-off balances show only the accrued, bonus, and carried-over time-off that you accumulate. You can find information about time-off in Time Off and the topics linked within it.

[+] Is it possible to check the time-off limits grid for an entire week or month, instead of just a single day?

Yes, you can check time-off limits for a day, week, month, or longer, depending on the dates you select before you click **New** to enter a time-off request, or "Edit" to change one. In the main Time-off Planner, instead of selecting only one day, select all of the dates that you want to see, for example, all the dates in a month or week. When the **Time-Off Limits** grid opens, you will be able to see the entire range of dates and the time-off limits in red.

Look at the procedure in the topic Requesting Time Off. You'll notice that the first step (before clicking "New") is to select the dates you want to see in the **Time-Off Limits** grid.

[+] How do I determine how many time-off requests are ahead of mine in the wait-list?

To determine where your request is in the wait-list queue, click the timestep in the Time-Off Limits grid. The pop-up information box provides the number of requests waiting for processing For example, you might be one of three people waiting, but time off is processed on a first-come, first served basis, so your request might not necessarily be the next one autogranted. Since every contact center has different time-off rules, limits, and autogrant settings for requests, Genesys recommends you ask your supervisor to provide more detail.

[+] When I submit a request for time off and it's wait-listed, when will I know if my request is approved or denied?

Workforce Management automatically wait lists time off requests on a first-come, first served basis, if the time requested is not available, and supervisors or administrators determine if autogranting is enabled for your site. After processing, you will see any approved (or denied) requests in the Time-Off

Balance pane on the left side of your screen. At the top of the Balance pane, you can select a time-off type to see all of the information described in this table Balance pane, including the status of your request (granted, declined, schedule, etc.).

Each contact center likely handles holidays differently, so I'd suggest speaking to your supervisor about how time-off is handled on holidays in your site.

[+] When I request time off and get an error message that the request date has not yet occurred, is there a way to be put on the wait list?

Talk to your supervisor or manager about the error message you are receiving. Every contact center has different rules, limits, and settings to manage time-off requests, based on how your supervisor or manager prefers to manage their teams or site.

If there are no issues with the request (no error message displays when you create it) and the requested time is unavailable, WFM automatically adds the request to the wait-list. WFM processes wait-listed requests on a first-come, first served basis, although there might be other limitations for full-day requests. Ask your supervisor if there are any limitations set for your team or site.

Schedules

[+] Where can I see any changes that were made to my schedule throughout the day?

Supervisors often make changes to schedules and in some centers, agents receive email notifications when this happens. If you are not receiving notification of changes, you might want to discuss this with your supervisor or team lead. Perhaps notifications have not been enabled in your contact center. This WFM feature is controlled and managed by supervisors and administrators.

Any other features that are available to you are visible in **Schedule** > **My Schedule**.

[+] How do I export my schedule to Outlook?

Currently, exporting WFM Schedules to Outlook is not supported in WFM. However, you can print your schedule. See the description of the **Print Schedule** button on this page: My Schedule.

Preferences and Availability Patterns

[+] What is the difference between creating an Availability Pattern and setting Preferences?

Adding preferences for shifts, availability, or a day off is usually a one-of entry. Meaning it's only applicable once, for the dates you specify. You can add more than one date (day), shift, or availability in the preference, but it doesn't establish a pattern for a specific time period.

Availability Patterns make it easy to set preferences that are the same for multiple weeks. Use them to set weekly patterns that you can reuse. For example, you might want to create an Availability Pattern to let your supervisor know that you are available for work between the hours of 8:00 am and 4:30 on Tues, Wednesday, and Thursdays for the next three weeks. Unless you create a pattern, you will have to enter your availability for each of the three weeks separately (even though your availability is the same for each of the three week).

Take a look at Preferences and Patterns. It might help you to understand when to use one or the other, or both.

[+] Do Availability Patterns affect schedule bidding?

Availability Patterns do not affect schedule bidding.

Changing Settings

[+] How do I change the timezone in my application?

You can change the site timezone in **Personal** . Take a look at the graphic on this page: The Personal Pane.

[+] How do I change the colors of my scheduled activities?

Supervisors control this WFM feature (colors of Schedule items). Perhaps you could speak to your supervisor about it.

[+] How do I change my application from the default view to Classic Agent?

In the upper right-hand corner of your view, click the down arrow beside your name and select **Classic Agent** in the drop-down list.

[+] How do I change the Web for Agents default view?

Agents cannot change the Web for Agents default view. Administrators set the view for teams, business units, sites or the entire contact center (not individual agents), depending on the version of WFM being used.

Logged In Session Expiry

[+] How do I extend the login time-out period to log back into Genesys?

The session length or duration generally depends on your browser configuration (Internet Explorer, Chrome, FireFox, etc.).

Here's our recommendation: When you log in, be sure to select the “Keep me logged in” option box. This will ensure your session doesn’t time out automatically. Also, clearing your cache will reset any session data in your browser, which might help. Use the browser Help to find out how to clear the cache in the browser you are using.

Things Agents *Cannot* Do

Sometimes you ask us about settings or functionality that you do not have access to or cannot change. Often they are controlled by supervisors or administrators, or governed by contact center policies or rules. It might be helpful for you to know what you *cannot* do.

[+] Are there things I cannot do?

Agents using Workforce Management cannot:

- Change the default version of Web for Agents.
- Change your password in WFM. Ask your supervisor how to do this in your contact center.
- Change the color scheme of items in the legend, schedule, or calendar.
- Recall time-off requests that occur in the past. Ask your supervisor to do this for you, if necessary.
- See *days off in lieu of* in your schedule or the calendar. Ask your supervisor about this, if you are requesting a day off *in lieu of*.
- Import your schedule into Outlook. WFM does not support this functionality.