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Workforce Management Web for Supervisors Help

Configuring Adherence Rules

Contents

- 1 Configuring Adherence Rules
 - 1.1 Adherence Rules Pane Controls
 - 1.2 Setting Adherence Rules
 - 1.3 Configuring Media Channels for Schedule State Groups

Configuring Adherence Rules

You can configure Adherence Rules for each Schedule State Group and for multiple media channels within a site. These rules determine what standards WFM uses when monitoring agent performance. To view the **Adherence Rules** pane, select **Adherence Rules** at the top of the **Schedule State Group Properties** pane.

Adherence Rules Pane Controls

 Save Now	Click to save changes you have made in this pane.
 Associate Genesys current states with schedule states group	Click to associate Genesys current states with schedule state groups.
 Delete State	Click to delete an associated Genesys state.
 Help	Click to view a Help topic about the Adherence Rules pane.

Adherence Threshold Levels

<p>Channel</p>	<p>Click to configure the media channel for the schedule state group. Select one of three radio buttons:</p> <ul style="list-style-type: none"> • None—Schedule state groups containing non-work activities that do not have a specified channel (and therefore, belong to all channels). • Voice/Unspecified—Schedule state groups using this channel contain voice-related activities and other work that is not related to any other configured channel, such as other non-media-channel activities. • Specify Name—Schedule state groups with this name will contain activities and other work being done on this channel. <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Important The channel name must match the name that is used in Stat Server statistics (and sent to WFM).</p> </div>
<p>Channel Name</p>	<p>Enter a name for the selected channel.</p>

Genesys Current States Mappings

<p>Start Before Threshold <i>field</i></p>	<p>Enter a start time. This is the duration of time considered to be adherent time before the start of a schedule state.</p> <p>Valid values are 0–20. The default value is 20.</p>
<p>End After Threshold <i>field</i></p>	<p>Enter an end time. This is the duration of time considered to be adherent time after the end of a schedule state.</p> <p>Valid values are 0–20. The default value is 20.</p>
<p>Current State <i>drop-down list</i></p>	<p>Select a state from this list to set the current state to be mapped to the aux (reason) code.</p>
<p>Aux Code (Reason) <i>field</i></p>	<p>Enter an appropriate aux (reason) code. A reason is user-specified information that supplements schedule state information. A reason helps to define the precise nature of the schedule state group to which it is attached.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Tip Reasons do not apply to all Genesys current states. Refer to your Genesys Stat Server documentation for additional information.</p> </div>

Start Before and End After Thresholds

Set the Start Before Threshold and End After Threshold for an acceptable amount of flexibility in scheduled state start and end times. Threshold settings indicate how many minutes early or late an agent can transfer to a scheduled state without being considered *nonadherent*.

Example 1: An agent is scheduled to start a shift at 12:00 PM and the Start Before threshold is set for 5 minutes. If the agent starts the shift at 11:54 AM, which is beyond the 5-minute threshold, it is written to the database and appears on the adherence reports as a nonadherent current state.

Example 2: If the schedule requires agents to work from 12:00–1:00 and both thresholds are set to 5 minutes, an agent who starts at 11:55 and ends at 1:04 is adherent. Agents who start and/or end outside the configured thresholds are either *nonadherent* or *severely nonadherent*.

You can configure the setting that marks the cut-off between nonadherence and severe nonadherence in the **Alarm Threshold** combo box on the **Site Properties** pane of the **Organization** module. See [Site Properties](#) for details.

Setting Adherence Rules

[Link to video](#)

To set adherence rules for a schedule state group:

1. In the **Schedule State Groups** pane, select a schedule state group.
2. At the top of the **Schedule State Group Properties** pane, select **Adherence Rules**.
The Adherence Rules pane opens.
3. In the **Start Before Threshold** and **End After Threshold** fields, set the adherence threshold levels for the schedule state group.
These rules define agent adherence parameter. Agents are adherent if their start time and end time are within threshold intervals for that scheduled state.
4. Select the media channel for the Schedule State Group: **None**, **Voice/Unspecified**, or **Specify Name**.
If you choose Specify Name, enter the channel name—for example, email.
The channel name must match the name that is used in Stat Server statistics (and sent to WFM).
5. Click **Associate Genesys current states with schedule states group**  to populate the mappings list in the lower half of the pane.
 - Select the current states that should be associated with this schedule state group.
 - Continue adding rows as necessary.
 - To remove a Genesys current state from the **Current State** column, select it and then click **Delete State** .

You can associate a Genesys current state with any number of schedule state groups.
6. Enter reasons (aux codes), if necessary, by typing the appropriate code into the **Reason Code** column for the appropriate Genesys current state.
7. Click **Save Now** .

Configuring Media Channels for Schedule State Groups

Configuring a media channel for schedule state groups enables you to track an agent adherence to the schedule when agents are scheduled to work on multiple media channels or when agents are working on a media channel that is currently not scheduled. Agents are considered non adherent, if they are non adherent on any one of those channels.

After implementation, WFM tracks multiple channel-related agent real-time states per time interval. See the following example of a contact center use case that might require multi-channel adherence tracking.

Use Case: Tracking 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 States
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-mails	<channel_name> (for example, email)	Deferred, email related activities	WaitForNextCall, CallRinging, AfterCallWork, CallInbound
Overheads	None (no channel)	Breaks, meals, time off, exceptions, etc.	NotReadyForTheNextCall, LoggedOut

Important

Tracking multi-channel adherence is a new feature in WFM 8.5. If there is no schedule state group 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 in previous WFM releases. 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 more information about how WFM calculates agent adherence for single channel and multi-channel sites, see [Adherence Calculations](#).