Overview:
Configuring, Forecasting, and Scheduling with Workforce Manager focuses on the concepts and skills needed to use Genesys Workforce Manager (WFM) to forecast workload and workforce, schedule agents, and monitor adherence to forecasts and schedules. This is a hands-on class where students configure a variety of contact center examples to gain knowledge of Workforce Manager’s capabilities. The course includes the following topics: contact center rules, contracts, shift definitions, forecasting, scheduling, monitoring adherence and performance, and using the web interface as a supervisor or agent.

Availability:

<table>
<thead>
<tr>
<th>Method</th>
<th>Instructor-Led</th>
<th>Virtual Instructor-Led</th>
<th>Self Study</th>
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</thead>
<tbody>
<tr>
<td>Duration</td>
<td>5 Day(s)</td>
<td>5 Day(s)</td>
<td>30 Days Access</td>
</tr>
<tr>
<td>Pricing</td>
<td>40 TUs</td>
<td>40 TUs</td>
<td>35 TUs</td>
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Course Objectives:

After completing this course, a student will be able to:

- Summarize the benefits and components in Genesys Workforce Manager (WFM)
- Configure a contact center in Workforce Manager (seats, activities, skills, and security rights)
- Configure contact center rules and policies (contracts, meals, breaks, shifts, trading, exceptions and time off)
- Forecast workload and the workforce necessary to cover it
- Build and modify work schedules for agents
- Configure and use WFM Web Agent to manage agent time off, agent trading, agent initiated exceptions and agent bidding
- Manage a workforce (assign agents to teams, plan exceptions, grant agent preferences, and schedule meetings)
- Monitor adherence to forecasts, schedules, and agent compliance to scheduled activities
- Run reports needed for contact center management
- Combine physical contact centers into a business unit

Target Audience:
Configuring, Forecasting, and Scheduling with Workforce Manager is intended for contact center managers, supervisors, and others responsible for scheduling and monitoring contact center efficiency.

Software Version:
This course uses Genesys version 8.5.1

Course Prerequisites:
Working knowledge of Microsoft Windows, including the ability to open and close windows and mouse proficiency
- Experience supervising or managing in a contact center

Course Outline:

1 - Introduction to Workforce Management
- Summarize the elements of the Genesys Workforce Management (WFM) system
- Describe the Workforce Management Cycle
- Identify features and benefits of Genesys Workforce Management

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2 - Setting Up Your Business
   - Log In/Log Out of Workforce (WFM) Web Supervisor
   - Navigate the WFM Web Supervisor
   - Use the WFM Help screens
   - Identify and review configuration settings needed to configure the Chicago classroom site
   - WFM Web Supervisor: Organization, Activity, Skills, Activity, Hours of Operations, Contracts, Shifts
   - Recognize features within the WFM Web Supervisor.

3 - Forecasting - The Basics
   - Familiarize yourself with Historical data
   - Create a forecast scenario
   - Build a forecast from historical data
   - Build workforce (staffing) requirements
   - Publish the forecast scenario to the Master

4 - Scheduling - The Basics
   - Create a scenario and define the scenario elements
     - Scenario Name
     - Start/End Date Range
     - Comments about what is being included in a scenario
   - Open the scenario
   - Build Schedule
   - Review Coverage levels
   - Add, Edit or Delete schedule items
   - Publish the Schedule

5 - Advanced WFM Configuration
   - Set User Permissions/User Security
   - Understand the Organization Configuration
     - Business units
     - Sites
   - Configure statistic collection in activities
   - Configure Activity Sets
   - Configure Task sequences
   - Configure all Contract rules
   - Configure all Shift configurations
   - Configure Rotating Patterns
   - Create Profile Contracts
   - Configure Marked Times

6 - Forecasting - Advanced Topics
Workforce Management 8.5 Operation
WFM851-OPT

- Create a forecast scenario
- Configure and use overlays and events in a forecast
- Build a workload forecast without historical data
- Create and apply forecast templates
- Review calculated staffing requirements and modify as needed
- Build required staffing requirements
- Use and translate forecasting graphs
- Publish the forecast scenario to the Master Forecast

7 - Pre-Schedule Planning
- Set Web Agent Preferences
- Use Workforce Management Calendar to:
  - Approve/Decline Calendar items
  - Add/Edit/Delete Calendar items
  - Change Filter Settings for the Calendar views
- Create Exception Types
- Configure a Meeting in Meeting Planner and Scheduler

8 - Scheduling - Advanced Topics
- Create a schedule scenario
- Build a schedule
- Troubleshoot Schedule Warning and Error messages
- Translate schedule view and adjust schedule view options
- Make schedule changes
- Publish schedules to the Master
- Rebuild Intra-day schedule

9 - Post Scheduling Activities
- Create schedule trade proposals as an agent
- Respond to other agents' trade proposals
- Display the list of trades
- Accept or Decline a schedule trade as a Supervisor
- Describe when and how to configure Agent Initiated Exceptions
- List the steps the agent needs to complete to initiate their own exceptions
- Supervisor approval of agent initiated exception

10 - Schedule Bidding
- Create a Bidding scenario
- Login as agents to rank schedules
- Complete the Auto assignment and publish bidding schedule

11 - Multi-Site Configuration
Create a Multi-Site Activity
Forecast with a Multi-Site Activity

12 - Time Off Management
• Create time-off types
• Manage time-off rules
• Set and maintain time-off limits
• Review time-off requests
• Approve/decline calendar items

13 - Performance
• Display the Performance views for each object
• Set Alerts
• Perform “What-If” calculations

14 - Adherence
• Set the Detail and Graphical views for Adherence
• Filter the states to show in the Details View

15 - Reporting
• Identify key WFM Reports
• Create and view a WFM Report
• Export a report to a local file
• Describe how to use the Reports Scheduler to schedule reports, such as Schedule Summary Report to generate on a weekly basis