

Genesys Cloud

Staffing Group Beta – How-to for Set Up



Staffing Group – What's it all About?

* Problem we are solving:

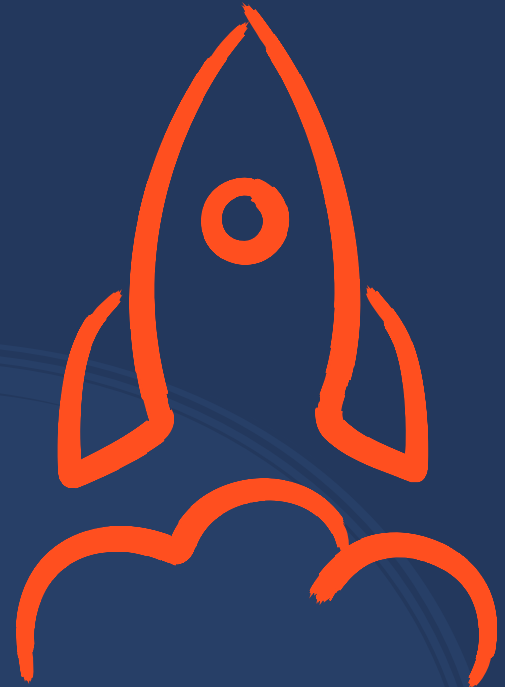
- Time off limits and plans were only able to be configured at the Management Unit (MU) level. For example, let's say you have 100 agents in an MU and you have 40 hours that you will allow for time off on a given day, those 100 agents will all be competing for the same time off limit of 40 hours.

* Staffing Groups for Time off Limits – Why it helps:

- Now you can configure a smaller group of agents. For example, you can group agents that are in your 'Morning Shift' and have a certain skill/language/queue. The grouping is called 'Staffing Groups'. This smaller subset of agents will use the time off limits you set for them.

* Staffing Groups for Time off Plans – Why it helps:

- Agents can now be grouped in time off plans using Staffing Groups. This way you can have 'time off plan' rules that apply to the Staffing Group and not the entire MU.



Staffing Group Step-by-Step

Prerequisite:

- * The user's role that is configuring should be assigned permissions to all related options:

- WFM > Staffing Group
- WFM > Time Off Limit
- WFM > Time Off Plan

Deadline for Submitting Beta Feedback for GA

- * 12/20/2023



Step 1: Create Staffing Groups in new configuration screen



Step 2: Add Time off Limits per Staffing Group



Step 3: Add Staffing Groups to Time off Plan



Step 1.1: Configure your staffing groups

Staffing Group Configuration Steps

- * Go to Admin > Workforce Management > Configuration > Staffing Groups
- * You can select with BU or MU in the BU/MU picker on the upper right corner (the example has a MU selected; it's called "DO_NOT_DELETE_DAMARIS_DEMOS")
- * Once you selected the BU or MU you would like to add the Staffing Group to, click the 'Add' Button

Staffing Group Configuration

The screenshot shows the 'Staffing Groups' configuration page in a software interface. The page has a top navigation bar with 'Admin' selected, and a left sidebar with 'Staffing Groups' highlighted. The main content area is titled 'Staffing Groups' and contains a table with columns for 'Name', 'Management Unit', and 'Number of Members'. A callout labeled '1' points to the 'Staffing Groups' link in the sidebar. A callout labeled '2' points to the 'BU/MU Picker' dropdown menu, which is currently set to 'DO_NOT_DELETE_DAMARIS_DEMOS (DO_NOT_DELETE_VIDAS)'. A callout labeled '3' points to the '+ Add' button in the top right corner of the table area. The table currently displays 'No data available'.

1 New Staffing Group Configuration

2 BU/MU Picker

3 Click 'Add' – To configure Staffing Group

Step 1.2: Configure your staffing groups

Staffing Group

- * Name your Staffing Group
- * You can filter for agents by using the filter to the right of the screen. Make sure to hit the 'Apply Filters' bottom once you have your filters selected
- * From the 'Available Agents' list, click the '+' sign for the agents you would like to add to the Staffing Group
- * Click 'Save'
- * NOTE: For Beta, you will not be able to filter by agent name yet.

Staffing Group Configuration

The screenshot shows the 'Staffing Group Configuration' interface. At the top, there is a text input field for 'Staffing Group Name' containing 'Morning Shift Java Developers', with a callout '1 Name your Staffing Group' pointing to it. Below this are two tables: 'Assigned Agents' and 'Available Agents'. The 'Assigned Agents' table lists Geordi LaForge, Kathryn Janeway, and Wesley Crusher. The 'Available Agents' table lists Tasha Yar, with a callout '4 Click '+' to move agents over' pointing to a '+' icon in the table's header. To the right of the tables is a 'Refine Available Agent Search' sidebar with filters for Planning Groups, Languages, Skills (currently set to 'java'), Queues, Groups, Teams, and Management Units. A callout '2 Select Filters' points to this sidebar. At the bottom of the interface, there are 'Save' and 'Cancel' buttons, with a callout '5 Click 'Save'' pointing to the 'Save' button, and an 'Apply Filters' button, with a callout '3 Click Apply Filters' pointing to it.

Staffing Group Name *

Morning Shift Java Developers

Assigned Agents ⓘ

Agent	Staffing Group
Geordi LaForge	×
Kathryn Janeway	×
Wesley Crusher	×

Remove All 3 assigned

Available Agents ⓘ

Agent	Staffing Group
Tasha Yar	+

Add All 1 available

Refine Available Agent Search ⓘ

Search by Agent Name

Planning Groups

Languages

Skills 1 ×

java

Queues

Groups

Teams

Management Units

Save Cancel Apply Filters Clear

Step 1.3: Staffing Group Configured

Yeah! You configured the Staffing Group

The screenshot displays the Genesys Workforce Management interface, specifically the 'Staffing Groups' configuration page. The left sidebar shows the 'Configuration' menu with 'Staffing Groups' selected. The main content area shows a table of staffing groups. One group is listed: 'Morning Shift Java Developers' under the 'DO_NOT_DELETE_DAMARIS_DEMOS' Management Unit, with 3 members. Two red callout boxes highlight the Management Unit and the member count.

<input type="checkbox"/>	Name	Management Unit	Number of Members
<input type="checkbox"/>	Morning Shift Java Developers	DO_NOT_DELETE_DAMARIS_DEMOS	3

This Staffing Group falls under the "DO_NOT_DELETE_DAMARIS_DEMOS" Management Unit

There are 3 agents in this staffing group

Step 2.1: Configure Time Off Limits

Time Off Limits

- * Go to Admin > Workforce Management > Time Off > Time-Off Limits
- * SOMETHING NEW! Time off limits will now show up in a list view
- * In the BU/MU Picker, select the BU/MU you would like to add the Time Off Limits to
- * Click on the 'Add' Button

Configure Time Off Limits

The screenshot displays the 'Time-Off Limits' configuration interface within the Genesys Workforce Management system. The interface includes a top navigation bar with tabs for Activity, Directory, Documents, Performance, Reports, and Admin. A left sidebar shows a navigation menu with options like Configuration, Forecasting, Time Off (with sub-items Time-Off Limits, Time-Off Plans, and Time-Off Requests), and Scheduling. The main content area shows a list of Time-Off Limits. A table with columns 'Time-Off Limit Name', 'Type', and 'Time-Off Plan(s)' contains one entry: 'DO_NOT_DELETE_DAMARIS_DEMOS' with Type 'Management Unit' and Plan 'Bamboo HRIS Integration TEST - Study Day, Bamboo HRIS Integration TEST - Stud...'. Three numbered callouts are present: 1 points to the 'Time-Off Limits' link in the sidebar; 2 points to the 'BU/MU Picker' dropdown menu at the top right of the table; 3 points to the '+ Add' button at the top right of the table.

1 Select Time-Off Limit Configuration Screen

2 Select BU/MU from picker

3 Click 'Add'

Step 2.2: Configure Time Off Limits

Time Off Limits

- * Select the staffing group that the time off limits apply to
- * Add the limits for this group of agents
- * Click 'Save'

Configure Time Off Limits

The screenshot shows the 'Add Limit' configuration page in the Genesys Workforce Management interface. The breadcrumb trail is: Workforce Management / Time-Off Limits / DO_NOT_DELETE_VIDAS / DO_NOT_DELETE_DAMARIS_DEMOS / Add Limit. The left sidebar contains menu items: Configuration, Forecasting, Time Off (with sub-items Time-Off Limits, Time-Off Plans, and Time-Off Requests), Scheduling, Performance, and Historical Data Import. The main content area includes a date range selector set to '4 weeks' from 'Thu October 5' to 'Wed November 1 2023'. Below this is a table for configuring time-off limits.

<input type="checkbox"/>	Date	Time-Off Limit Hours	Allocated Time-Off Hours	Waitlisted Time
<input type="checkbox"/>	Thursday, Oct 5	16.00	-	-
<input type="checkbox"/>	Friday, Oct 6	16.00	-	-
<input type="checkbox"/>	Saturday, Oct 7	16.00	-	-
<input type="checkbox"/>	Sunday, Oct 8	16.00	-	-
<input type="checkbox"/>	Monday, Oct 9	16.00	-	-
<input type="checkbox"/>	Tuesday, Oct 10	16.00	-	-
<input type="checkbox"/>	Wednesday, Oct 11	16.00	-	-

On the right side, a dropdown menu is open for 'Morning Shift Java Developers', showing options for 'Management Unit' and 'Staffing Group' (which is selected). A warning message states: 'All management units already have limits.' At the bottom of the dropdown is a 'Save' button.

Numbered callouts indicate the steps: 1. Select the Staffing Group that applies to these time off limits (pointing to the dropdown); 2. Add the limits per day for this staffing group (pointing to the table); 3. Click 'Save' (pointing to the Save button).

Step 3.1: Configure Time Off Plans

Special Note

- * It's recommended to not have the same activity codes across multiple time off plans that apply to the same group of employees. For example, you should not have the following:
 - * "Time off plan 1" applies to the staffing group "Morning Staff" with the activity code of Vacation.
 - * Then you have "Time off plan 2" apply to staffing group "Morning Staff" with the activity code of Vacation
 - * Since the above example has the activity code of 'Vacation' applying to the staffing group "Morning Staff" across two different time off plans, the system will show an informational message and then the time off activity code will be moved to the 2nd time off plan.

Activity Code Associations ?

Warning: Some activity codes are already in a time-off plan. Saving may move them to this time-off plan.

<input type="checkbox"/> Activity Code	Current Time-Off Plan(s)	Counts as Paid Time	
<input type="checkbox"/> Time Off	TEST Duplicate Activity Code - Time Off (Paid)		Edit

Applies To ?

Warning: Some activity codes are already in a time-off plan. Saving may move them to this time-off plan.

☐ Management Unit ☒ Staffing Group

<input type="checkbox"/> Name	Current Time-Off Plan(s)	
<input type="checkbox"/> Morning Shift Java Developers	TEST Duplicate Activity Code - Time Off (Paid), TEST Duplicate Activity C...	Edit

Step 3.2: Configure Time Off Plans

Time Off Plan + Staffing Group

- ✳ Once the staffing group(s) are configured, we can now assign it to a time off plan. Or create a new time off plan with the staffing group.
- ✳ Go to Admin > Workforce Management > Time Off > Time-Off Plans
- ✳ In the BU/MU picker, select the BU or MU that you would like the Time off Plan to belong to.
- ✳ Click the 'Add' Button

Time Off Plan Configuration

The screenshot shows the 'Time-Off Plans' configuration screen in the Genesys Workforce Management interface. The left sidebar contains a menu with 'Configuration', 'Forecasting', 'Time Off' (expanded), 'Time-Off Limits', 'Time-Off Plans' (selected), 'Time-Off Requests', and 'Scheduling'. The main area displays a table of existing time-off plans. Three callouts are present: 1. Points to the 'Time-Off Plans' menu item. 2. Points to the 'Management Unit' dropdown menu, which is currently set to 'DO_NOT_DELETE_DAMARIS_DEMOS (DO_NOT_DELETE_VIDAS)'. 3. Points to the '+ Add' button at the bottom right of the table.

Time-Off Plan	Activity Codes	Auto Approval Rule	Count Against Time-Off Limit	Management Unit	Applies To	Enabled
<input type="checkbox"/> Bamboo HRIS Integration TEST - Study Day	Time off 2	Never	Yes	DO_NOT_DELETE_DAMARIS_DEMOS	DO_NOT_DELETE_DAMARIS_DEMOS	Yes
<input type="checkbox"/> VV1 Paid No HRIS - TOL Auto Approve	VV1	According to time-off limit	Yes	DO_NOT_DELETE_DAMARIS_DEMOS	DO_NOT_DELETE_DAMARIS_DEMOS	

Step 3.3: Configure Time Off Plans

Time Off Plan Configuration

The screenshot shows the 'Add Plan' configuration page in the Workforce Management system. The breadcrumb trail is: Workforce Management / Time-Off Plans / DO_NOT_DELETE_VIDAS / DO_NOT_DELETE_DAMARIS_DEMOS / Add Plan.

1 Name your Time-Off Plan: Points to the 'Time-Off Plan Name' field, which contains the text 'Time Off Plan for Morning Shift Java Developers'.

2 Select 'Count against time-off limit' check box: Points to the checked checkbox labeled 'Count against time-off limit' under the 'Rules' section.

3 Select 'According to time-off limit' radio button: Points to the selected radio button labeled 'According to time-off limit' under the 'Auto Approval Rule' section.

4 Select Staffing Group: Points to the 'Staffing Group' radio button in the 'Applies To' section.

5 Click 'Edit': Points to the 'Edit' icon in the table header of the 'Applies To' section.

6 Move over the group you would like to add: Points to the 'Morning Shift Java Developers' group in the 'Available' list of the 'Edit Applies To' modal.

7 Click 'OK': Points to the 'OK' button at the bottom of the 'Edit Applies To' modal.

8 Click 'Save': Points to the 'Save' button at the bottom of the main configuration page.

Configuration Details:

- Configuration**: Time-Off Plan Name *
- Forecasting**: Time Off Plan for Morning Shift Java Developers
- Time Off**:
 - Time-Off Limits
 - Time-Off Plans**
 - Time-Off Requests
- Scheduling**
- Performance**:
 - Historical Data Import

Rules

- ☒ Count against time-off limit
- Auto Approval Rule**
 - ☐ Never
 - ☐ Always
 - ☒ According to time-off limit
- Days Before Start to Expire from Waitlist: 0

Applies To

- ☐ Management Unit
- ☒ Staffing Group

Name	Current Time-Off Plan(s)	
<input type="checkbox"/> Morning Shift Java Developers		<input type="button" value="Edit"/>

Buttons: Save, Cancel

Time Off Plan

- * Name your time off plan
- * For 'Rules' select 'Count against time-off limit' with the 'According to time-off limit' radio button selected
 - o Feel free to test multiple selections. This is just to get you started.
- * Select what you would like the time off plan to apply to. The example selected the staffing group: Morning Shift Java Developers

The 'Edit Applies To' modal shows two columns: 'Selected' and 'Available'. The 'Available' column contains a search bar and a list of staffing groups. The group 'Morning Shift Java Developers' is highlighted.

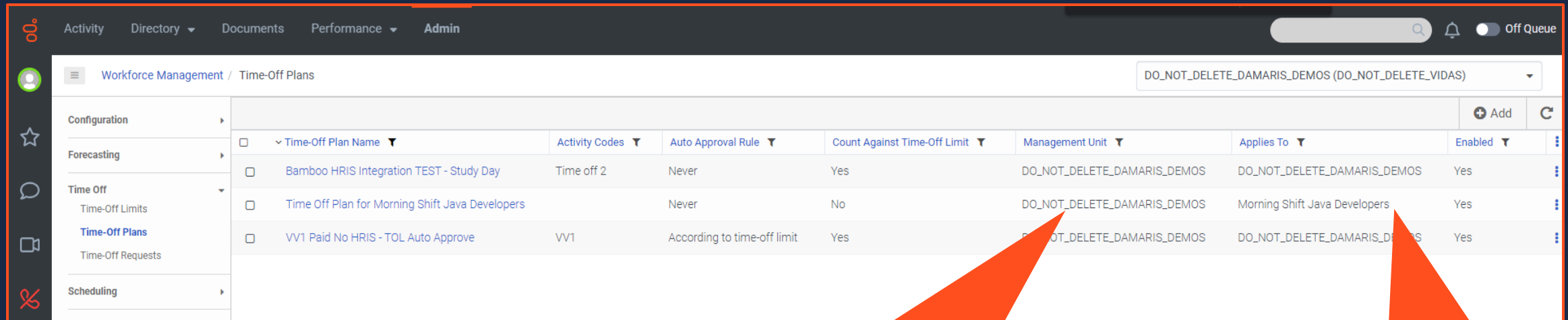
6 Move over the group you would like to add: Points to the 'Morning Shift Java Developers' group in the 'Available' list.

7 Click 'OK': Points to the 'OK' button at the bottom of the modal.

Buttons: Remove All, 0 Selected, Add All, OK, Cancel

Step 3.4: Time Off Plan Configured

Time Off Plan Configured



The screenshot displays the 'Time-Off Plans' configuration page. The left sidebar contains a navigation menu with options: Configuration, Forecasting, Time Off (sub-menu: Time-Off Limits, Time-Off Plans, Time-Off Requests), and Scheduling. The main content area shows a table of configured plans. The table has columns: Time-Off Plan Name, Activity Codes, Auto Approval Rule, Count Against Time-Off Limit, Management Unit, Applies To, and Enabled. Three plans are listed: 'Bamboo HRIS Integration TEST - Study Day', 'Time Off Plan for Morning Shift Java Developers', and 'VV1 Paid No HRIS - TOL Auto Approve'. The 'Management Unit' for all plans is 'DO_NOT_DELETE_DAMARIS_DEMOS'. The 'Applies To' for the first two plans is 'DO_NOT_DELETE_DAMARIS_DEMOS', and for the third, it is 'DO_NOT_DELETE_DAMARIS_DEMOS'. The 'Enabled' status is 'Yes' for all plans. Two red callout boxes point to the 'Management Unit' and 'Applies To' columns, with text explaining their function.

Time-Off Plan Name	Activity Codes	Auto Approval Rule	Count Against Time-Off Limit	Management Unit	Applies To	Enabled
Bamboo HRIS Integration TEST - Study Day	Time off 2	Never	Yes	DO_NOT_DELETE_DAMARIS_DEMOS	DO_NOT_DELETE_DAMARIS_DEMOS	Yes
Time Off Plan for Morning Shift Java Developers		Never	No	DO_NOT_DELETE_DAMARIS_DEMOS	Morning Shift Java Developers	Yes
VV1 Paid No HRIS - TOL Auto Approve	VV1	According to time-off limit	Yes	DO_NOT_DELETE_DAMARIS_DEMOS	DO_NOT_DELETE_DAMARIS_DEMOS	Yes

Management Unit the Time Off Plan is Under

Staffing Group Assigned – the group of employees that will fall under this Time Off Plan

Testing! Congratulations, you are ready to test!



Just some things to think about as you're testing

NOTE: At the end of this guide, there are a list of items that are not ready for Beta, but we are developing for GA

* Log in as multiple agents

- * Double check that your time off plan is set up to use time off limits and you test with the activity code set up in your time off plan
- * Put in time off for an agent that is not in the staffing group – notice that the time off limit hours will NOT be deducted because they are not in the staffing group
- * Try to have multiple agents within the staffing group apply for time off the same day and make sure that the limits are respected

* Feel free to test multiple scenarios

- For example, moving an MU that has staffing groups to another BU. The outcome will be that MU staffing groups without agents will be deleted and not moved. Agents will be removed from BU staffing groups. BU time off plans will be disassociated from the MU staffing group and MU.
- Test filters as you add agents to staffing groups

* We want to hear from you! Be sure to communicate questions/concerns on the community for Staffing Groups:

- <https://community.genesys.com/communities/staffing-groups-for-time-off-limits-beta?CommunityKey=d2156b1b-ab70-4c6a-88ae-018a8a387e9a>

Time Off

- Time-Off Limits
- Time-Off Plans**
- Time-Off Requests

Activity Code Associations ⓘ

<input type="checkbox"/>	Activity Code ▼	Current Time-Off Plan(s)
<input type="checkbox"/>	Time off 2	Bamboo HR

Rules

☒ Count against time-off limit

Auto Approval Rule

☐ Never

☐ Always

☒ According to time-off limit

Days Before Start to Expire from Waitlist ⓘ

0 ^ v

Activity Code Associations ⓘ

<input type="checkbox"/>	Activity Code ▼	Current Time-Off Plan(s) ▼	Counts as Paid Time ▼	⋮
<input type="checkbox"/>	Time Off		Yes	⋮


Known Issues In Progress

- * The number of time-off plans on the list page when BU is selected will be 300 if each time-off plan applies, on average, to 5 MU's or Staffing Groups. Otherwise, rate limiting errors may occur and the full list of time-off plans will not be shown
- * Audit information related to Staffing Groups will not be available
- * Staffing Groups create/edit UI will not support searching for agents by name
- * Agent admin view will not display an agent's Staffing Group association
- * Export of agent information will not include a Staffing Group association
- * Changes to Staffing Group membership must be performed by editing the Staffing Group and are not possible via the Agent admin view
- * Accessibility via keyboard may not fully work
- * Language localization may not be supported
- * The limit of 1000 staffing groups will not be imposed when moving a MU to another BU. Therefore, the destination BU may end up having more than 1000 SGs
- * Support for multiple divisions is not available until GA and could result in users being unable to view objects or view more objects than permitted
- * When agents are moved out of the MU, there may be a rare occasion where they remain in the staffing group
- * When SG that has associated Time Off Limits is deleted, waitlisted Time Off Requests for that limit may remain waitlisted instead of being removed from the waitlist
- * When the SG that a Time Off Plan applies to is deleted, then on rare occasion, the Time Off Plan may remain associated with deleted SG



Genesys Cloud

Employee Flexibility

A photograph of a woman with dark hair and bangs, smiling broadly, standing behind two young children on a yellow playground slide. The children are also smiling and looking towards the camera. The background shows other playground equipment and a clear sky.

Mobile and web-based tools to enable employee work-life balance in an equitable way, while minimizing manual approvals and meeting contact center goals.

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Employee Flexibility Roadmap

