



Ranking Profiles

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What Are ranking profiles?

Ranking profiles allow defining the order in which preferences should be applied to agents. For example, with a seniority ranking profile, agents with longer tenure will receive preference over those hired more recently. Ranking profiles are used in schedule preferences (day off and start time preferences – e.g., when optimizing schedules), schedule bidding, priority for ASAP acceptance, and vacation bidding.

Prior to setting up ranking profiles, determine the factors you plan to use for ranking agents and the order in which those ranks will apply. E.g., is seniority more important than a quality score? If there is a tie, should last name be the tie breaker or a random tiebreak score? Planning the structure ahead of time will save time when setting up the ranking profiles.

Ranking profile options

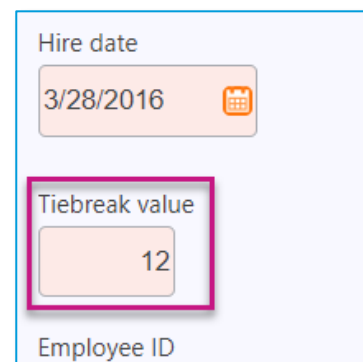
You can create multiple ranking profiles and have complete control over the order in which agents are included. Ranking profiles are flexible and work in a manner consistent with most Community objects.

Common ranking profiles and sorting criteria include—

- Seniority (based on hire date)
- Name (alphabetically by first letter of last name)
- Performance score (manually entered rank)

Tiebreak value

You can use a tiebreak value in the ranking by entering a number for each agent in their Basic properties. An agent with a tiebreak value of 1 will receive preference over an agent with a tiebreak value of 12, all other factors being equal.



Alternatively, you can enter a custom property for each agent in their profile, such as a quality score.



Creating ranking profiles

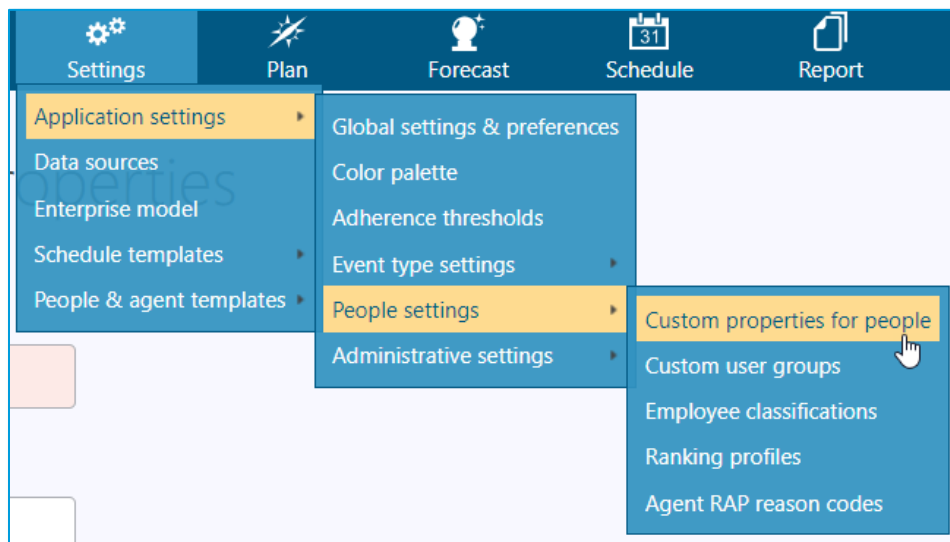
This is a multi-step process.

1. If you will be using a performance score or other custom field, [setup the custom properties](#) to use for ranking.
2. [Apply the custom properties](#) to the agents.
3. Define the [ranking profile settings](#).
4. Include the ranking profile in the schedule or vacation bidding set-up.

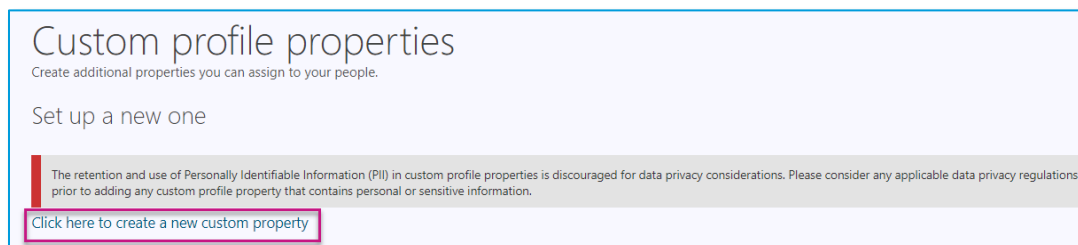
Step-by-step

Create the custom properties

Navigate to Settings > Application settings > People settings > Custom properties for people.



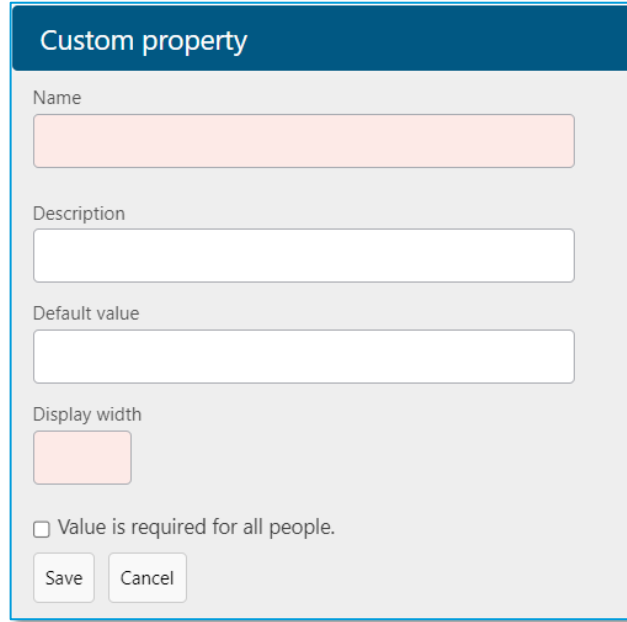
Select [Click here to create a new custom property](#).





Enter a name (required), description, default value, and display width (required). The display width is the number of characters for the field.

If desired, check the box *Value is required for all people* to ensure that everyone will have a value for this custom property in their profile. Check this only if necessary.



The screenshot shows a 'Custom property' form with a blue header. It contains four text input fields: 'Name', 'Description', 'Default value', and 'Display width'. The 'Name' and 'Display width' fields have a light red background. Below the 'Display width' field is a checkbox labeled 'Value is required for all people.' At the bottom are 'Save' and 'Cancel' buttons.

When complete, click *Save*. This property is now available as an option when applying custom properties to agents.

Apply the custom property to agents

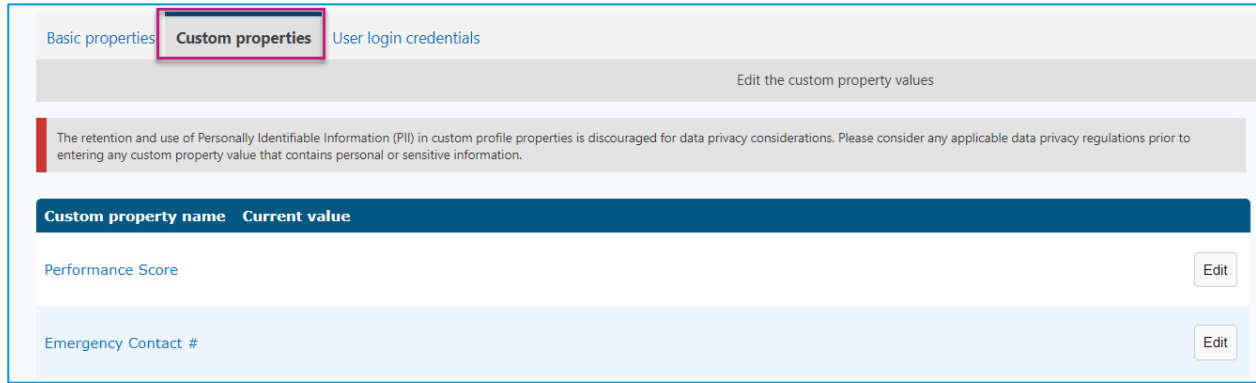
Some ranking profiles will use data default properties from the agent profile such as using hire date for seniority. For other custom properties, you may need to manually add values to each agent's profile.

Navigate to Settings > People & agent templates > People.

Select the first person in your list and in the Steps to Success navigate to their profile Properties.



In the Basic properties, navigate to the Custom properties tab to view currently applied custom properties, then click *Edit* and enter a unique value for a property (e.g., applying a performance score).



Basic properties **Custom properties** User login credentials

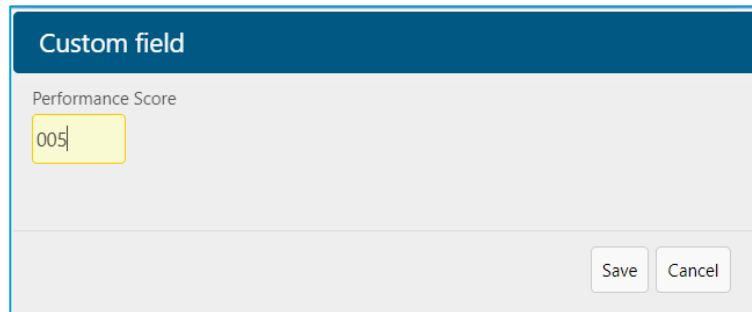
Edit the custom property values

The retention and use of Personally Identifiable Information (PII) in custom profile properties is discouraged for data privacy considerations. Please consider any applicable data privacy regulations prior to entering any custom property value that contains personal or sensitive information.

Custom property name	Current value
Performance Score	Edit
Emergency Contact #	Edit

For this field, if any numbers will be greater than 10 include leading zeros (e.g., 005). Otherwise, 11 (one, one) comes before 2.

Click *Save*.



Custom field

Performance Score

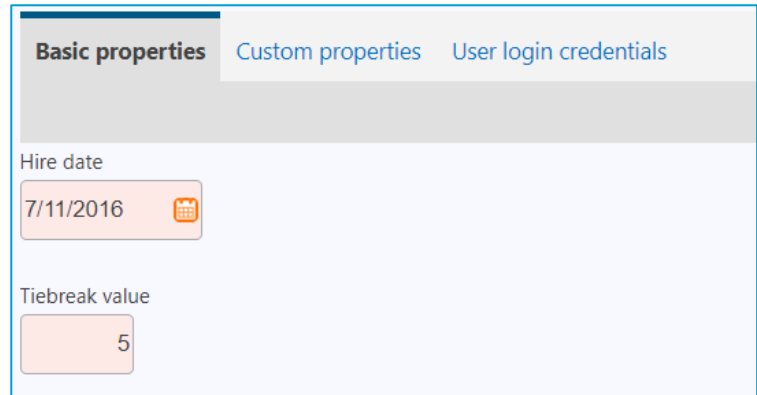
Save Cancel



Tiebreak Value

In the Basic Properties tab, enter a *Tiebreak value* between 1 and 1000 that the system can use if all other criteria match between two agents.

Note: The higher the tiebreak value number, the lower the agent is in the list when the system is breaking a tie.



Basic properties Custom properties User login credentials

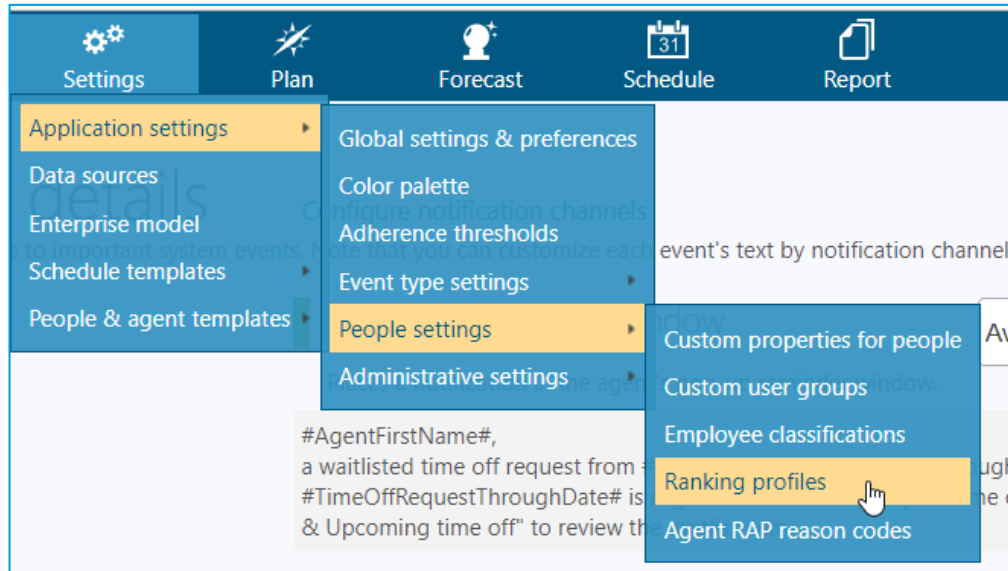
Hire date
7/11/2016

Tiebreak value
5

The agent with the tiebreak value of 1 will have preference over the agent with the tiebreak value of 5.

Define the ranking profile

Navigate to Settings > Application settings > People settings > Ranking profiles.





You can preview a list of current profiles then select *Click here to create a new ranking profile*.

Settings > Application settings > People settings > Ranking profiles

Ranking profiles

Create reusable sorting criteria for your people.

Set up a new one

[Click here to create a new ranking profile](#)

Current list

[Advanced list filter options](#)

Enter a descriptive name for the profile and an optional description.

Settings > Application settings > People settings > Ranking profiles > New ranking profile

Ranking profile properties

Create reusable sorting criteria for your people.

Step 1: Basic properties

Name

Description

Start time preference option

Use the average start time preference for all days of the week ▼

Start time penalty factor

10 (Significant penalty) ▼

Save Preview



Start time preference: Applies to schedule bidding and generating optimized schedules with seniority-based schedule generation. Select whether the system should average the start time across the entire week or use the preferred time from the first scheduled day.

Start time preference option

Use the average start time preference for all days of the week ▼

Use the average start time preference for all days of the week

Use the preferred start time of the first scheduled day

Average start time: If the preferred start time range is 8 am – 10 am, the system will use 9 am as the preference.

Preferred start time of first scheduled day: If Monday preferred start time is 8 am, it will use that time as the preference for the whole week.

Start time penalty factor: Applies to schedule bidding and generating optimized schedules with seniority scheduling.

This provides a way for the scheduling engine to evaluate the quality of the schedule for a person based on their start time preference option. The schedule assignment algorithm will use this as a multiplier when examining the difference between a candidate schedule and a participant's start time preference.

If the value for this field is low ("Slight penalty") then a variance in start time only minimally influences the selection of a candidate schedule. If it is high ("Significant penalty") then it magnifies the variance in start time for a candidate schedule. This start time preference penalty is used to sort the candidate schedules and pick the one with the smallest penalty value.

Start time penalty factor

10 (Significant penalty) ▼

1 (Slight penalty)

2

3

4

5 (Medium penalty)

6

7

8

9

10 (Significant penalty)

Click *Save* to go to the next step.

Save

Click *Save* to see additional options



Step 2: Configure sorting criteria. This step determines the order for the sorting criteria. Should hire date (seniority) be the most important/first criteria? Or performance score? It's best practice to use more than one sorting option.

Click *Add sort option*.

Step 2: Configure sorting criteria

Ordinal	Sort column	Comments	
1	Hire Date	Based on hire date in profile	▲ ▼ ✕
2	Performance Score	Manually entered in profile	▲ ▼ ✕

Add sort option

The top sort options in yellow are values from the agent profile (either default properties such as hire date or manually entered such as tiebreak value). The bottom options in grey are ones added as custom properties in the agent profile.

Sort option

Ordinal

Sort column

Hire date

Name

Employee id

Tiebreak value

Emergency Contact #

Performance Score

Save

Cancel

After creating and saving the sort options, you can move the order up or down with the blue arrows, or remove an option with the red X.

Step 2: Configure sorting criteria

Ordinal	Sort column	Comments	
1	Hire Date		▲ ▼ ✕
2	Tiebreak Value		▲ ▼ ✕
3	Performance Score		▲ ▼ ✕



Rank-based preferences in schedules

When generating an optimized schedule, there is an option to choose the rank-based preference type in the schedule task properties. The drop-down menu will contain a list of your ranking profiles to choose from.

Configure schedule task properties

Copy From Week of 7/11/2022

What scheduling algorithm do you want to use?

Advanced block-demand schedule fit algorithm ▼

How do you define the people included in this schedule?

Use the schedule template assignments from the participant's time line ▼

What profile do you want to use for rank-based preferencing?

Seniority ▼

-- No preferences --

demo

Seniority

Published Forecast ▼

staffing data come from?

How should the off-phone time be fit into the schedule?

Place intervals inline with schedule interval placement ▼

How would you like to set your schedule bias?

Minimize staffing cost 10 Maximize coverage

Go



Agent Schedule Preferences by Ranking

Agent schedule preferences allow agents flexibility in describing their preferences. Additionally, the scheduling engine includes the ability to swap schedules that may be preferred by higher ranking agents.

The engine will generate schedules in the same way it traditionally has, but then the swapper algorithm will compare the resulting schedules in conjunction with a Ranking Profile and determine if a schedule that a higher ranked agent prefers has been allocated to a lower ranked agent. If so, the algorithm will swap the schedules and move to the next agent on the list until the swapper has validated all the schedules against all agents' preferences.

A number of rules and constraints dictate how this is completed. The support desk can help you optimally configure this feature for your environment should you elect to take advantage of this feature.

Calendar Partitions

When setting up a calendar partition for vacation bidding, select a ranking profile to use when the calendar is open for bidding. The ranking profile will not apply to waitlisting.

PTO Calendar Properties

Name

2023 PTO for Full-time

Description

Calendar start date

1/1/2023

Calendar end date (inclusive)

12/31/2023

Include accrual transactions from days prior to start

0

Ignore accrual transactions from days prior to end

0

Participant selection type

Open selection

Include prior accruals when validating bid round selections

Yes, include beginning balance hours and accrual transactions.

Minimum role to view block selections

Agent

Ranking profile selection

Seniority

demo

Seniority

Restrict PTO classifications by shrinkage type

Save

Cancel