



Agent Self-Service Kiosk (ASSK)

Webinar handout
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About this document

This document accompanies the CommunityWFM College webinar *Agent Self-Service Kiosk (ASSK)*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

ASSK Description

Have a mandatory online training module that agents can complete when they're ready? But only if there's enough staff? Configure the event type settings and agents can ASSK to add it to their schedule. This feature allows agents to request designated events and add them to their schedule in real time without additional intervention from an administrator. Administrators determine the eligibility of events and configure applicable business rules, including allowable staffing variance, which run when the agent makes the request.

Configuring ASSK event types

There are two new attributes for event types:

1. **Can this event type participate in Agent Self-Service Requests?** If *Yes*, the event type will appear on the self-service kiosk page.
2. **Does this event type require rule validation?** If *Yes*, the system will validate the request against the proscribed rules. If *No*, requests are automatically approved and appear on the schedules.

Available rules include schedule performance (will deny a request if it will result in a staffing shortage), restricted action plans, hire date restrictions, date eligibility, and others. Only events that pass the rules validation are added to schedules.



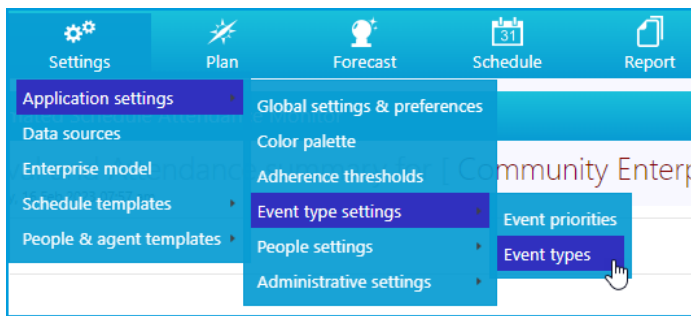
Creating the ASSK event

Application administrator

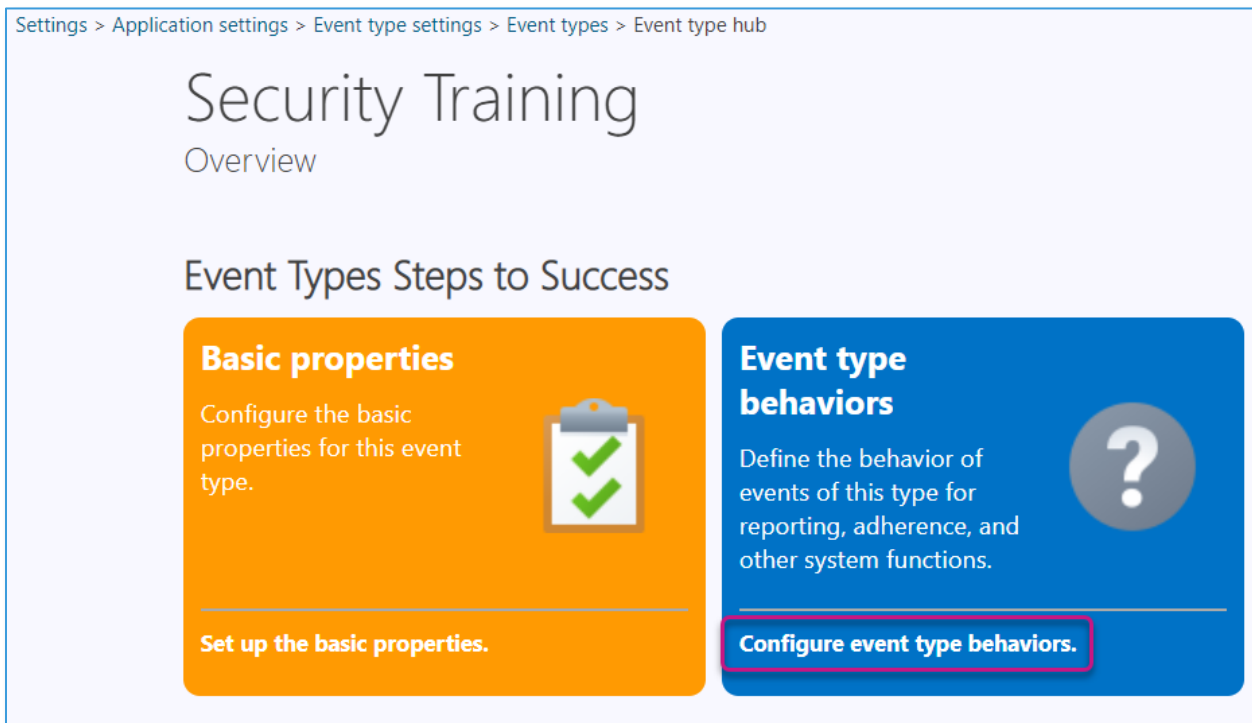
The application administrator creates the eligible event types for agent self-service, as well as configures any applicable business rules used to evaluate individual self-service requests.

Configuring event types

The first step is to create new eligible event types. Navigate to Settings > Application settings > Event type settings > Event types > [Click here to create a new event type](#).



After creating the basic properties for the event, navigate to the Event type behaviors.





There is a predefined event type classification for *Agent Self-Service request*.

Select this classification then click *Save behaviors*.

Select from the list of predefined event type classifications.

| Classification name | Description |
|---|-------------|
| Agent Self-Service Request These are the events that agents can add to their own schedules for personal development, training, etc. | |
| Break & Lunch Event These are the <i>normal off phone intervals</i> that occur every day. In addition to breaks and lunches, this event type classification includes other schedule | |
| Intra-Day Exception Event These are the <i>unplanned</i> exceptions that occur during the day, including sick time, no-shows, late time, etc. | |
| Meeting / Training Event These events are <i>preplanned</i> , at work events such as meetings, etc. | |
| Pre-Planned Time Off Event Time off events that can be requested and approved <i>before the schedule is created</i> . This would include Vacations, Jury Duty, Personal Leave, etc. | |
| Work Time Event (In Queue) Generic on-phone activity time. This includes work on the phone queues, or any scheduled work time for your agents. | |

Save behaviors Clear selections

Two new attributes of event types determine ASSK eligibility:

1. *Is this event type available for agent selection in the Agent Self-Service Kiosk?* must be *Yes*.
2. *If eligible for Agent Self-Service Kiosk, does this require runtime validation?* determines whether rules will be applied to the event when selected by an agent. If *No*, once selected the event will be placed on the agent’s schedule. If *Yes*, the system will evaluate the business rules prior to approving the event.

To view all the settings, click the *Custom behavior settings* tab.

ASSK
Step 2: Event type behaviors

Predefined event type classifications **Custom behavior settings**

Select from the list of predefined event type classifications.

| Classification name | Description |
|--|-------------|
| Agent Self-Service Request These are the events that agents can add to their own schedules for p | |



Custom behavior settings

All events include the option to customize the behavior settings. For ASSK events, some of these options are disabled.

Can this event type be used as a default work type?

This is **false and disabled** for ASSK events because we do not allow agents to perform self-service tasks on work intervals (i.e., they can't make their own work schedule).

Does this event occur at work / onsite?

This is **true and disabled** because we do not allow agents to use the self-service kiosk for time off events.

Is this event type's start time and duration constrained by an agent work type event?

This is **available** because ASSK event types may be constrained by work, or they can be "free floating" events that do not depend on the agent already being scheduled for a work event. For example, if an agent wants to add an hour of online security training to the end of a shift. Yes = agent must have a scheduled shift in place for the time of the request. No = request may be outside of a scheduled shift.

Is the scheduled agent logged into a queue during events of this type?

This is **false and disabled** because we do not allow agents to put themselves into an in queue event – all ASSK events are considered out of queue.

Does this event type require supervisor approval?

This is **false and disabled** because the event types can be independently configured for "requires validation" (the last option), or auto-approved if they do not require validation. This option would conflict with the other behavior settings specific to ASSK enabled event types.

Are agents available for callback into queue during events of this type?

This is **available** to allow recalling an agent currently scheduled in an ASSK event type to return to the queues to handle surging contact volume.



Do events of this type travel with agent schedule swaps?

This option is **available** to enable moving the entire schedule with a swap, giveaway, or takeaway transaction.

For real-time adherence, should agents be considered logged into queue during events of this type?

This option is **available** for ASSK event types because, while the in queue / out of queue option is disabled, there is the option to consider the event in queue for adherence.

By default, these event types are considered "out of queue" for the purpose of counting scheduled agents in queue (to compare with staffing requirements). However, the "in queue for adherence" option may be enabled to control whether these self-service events count as out of adherence intervals.

Is this event type available for agent selection in the Agent Self-Service Kiosk?

This is **true and disabled** for the ASSK event type classification.

If eligible for Agent Self-Service Kiosk, does this event require runtime validation?

This is **available** and determines whether agents can simply select the event type, date, and duration and the event is automatically placed on their published schedule, or if the event must be validated against a collection of rules. If *Yes*, then requests of this type are validated against a collection of user-configurable business rules. If *No*, the request is visible to all agents and will be automatically approved and appear on an agent's schedule.

Self-service validation plans

The ASSK feature includes the ability to create Self-Service Kiosk Validation Plans – sets of business rules that will run prior to placing a requested ASSK event on an agent's schedule.

These plans are named and reusable containers that match event types to business rules and contain the following elements:

- **A Participant List** defines the inventory of agents to whom the business rules apply. This can be based on an activity, a supervisor, a custom user group, or an ad-hoc collection of

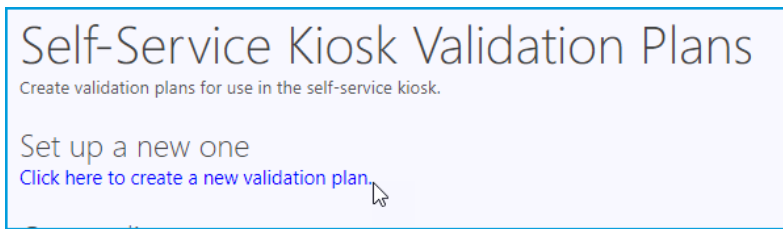


agents. **Note:** an agent *may be assigned to overlapping validation plans*. In this case, the validation engine will validate all rules from all applicable plans.

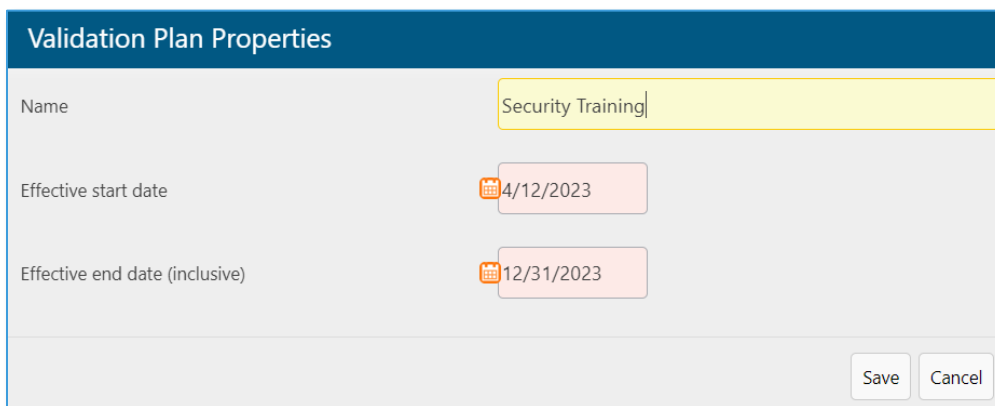
- **An effective date range** defines the applicable date range for the business rules. This supports a different collection of rules for different times of year. This date range is used to validate the “Date Range Eligibility Rule.”
- **Included Event Types or ALL eligible Event Types** defines the inventory of self-service event types that are included in this validation plan. You may include an event in more than one plan.
- **For each Event Type, applicable rules and parameters** allows you to configure each of the business rules for the selected event. The rule may be toggled on / off, and any that require user defined values (e.g., Schedule Performance Rule), will allow input of specific values.

Creating the validation plan

1. Navigate to Plan > Self-service validation plans.
2. Select *Click here to create a new validation plan*.



3. Provide a name and effective date range for the plan.
4. Click *Save*.



| Validation Plan Properties | |
|---|-------------------|
| Name | Security Training |
| Effective start date | 4/12/2023 |
| Effective end date (inclusive) | 12/31/2023 |
| <input type="button" value="Save"/> <input type="button" value="Cancel"/> | |




Adding member event types

Click *Set up member event types*.

1. Click *Include* for each event type that you wish to include in the validation plan.

Configure Event Types for this Validation Plan

The following eligible event types are defined in the application. To include an event type, click the "Include" button in the list below. If you want to remove an event type from this validation plan, click the "Remove" button.

| Event type | Validation required? | Is Configured? | |
|---|----------------------|----------------|---------|
|  Security Training | | | Count 1 |

If the event type is not listed, check the custom behavior settings of the event (Settings > Application settings > Event type settings > Event types > Event type hub) to ensure that the event has *Yes* for *Is this event type available for agent selection in the Agent Self-Service Kiosk?* and *Yes* for *If eligible for Agent Self-Service Kiosk, does this require runtime validation?* Both must be *Yes* for the event to appear on the list of event types eligible for a validation plan.



Configuring the business rules

- For **each** included event type click *Configure* to set up the rules.

Configure Event Types for this Validation Plan

The following eligible event types are defined in the application. To include an event type, click the "Include" button in the list below. If you want to remove an event type from this validation plan, click the "Remove" button.

| Event type | Validation required? | Is Configured? | | |
|------------|----------------------|----------------|--|---|
| | Security Training | ✔ | ✔ 2 | <input type="button" value="Configure"/> <input type="button" value="Include"/> <input type="button" value="Remove"/> |

- To apply a rule, click on the rule name to open the configuration panel.
- Select *Yes, include this rule in the validation plan* from the drop-down menu. For some rules there are additional options.
- Click *Save* for each rule setting after configuring.

Configure validation rules

Security Training Security

The list below contains the eligible validation rules that can be applied to self-service validation plans.

- Schedule Constraints Rule**
Validate constrained events for start time and duration.
- Date Range Eligibility Rule**
Ensure that a user requesting a self-service event is requesting a date within a defined validation plan.
- Agent Hire Date Restriction Rule**
Ensure that a user requesting a self-service event is not inside the range of a hire-date delay.
- Maximum Date Interval Rule** 3
Ensure that a user requesting a self-service event is not making a request outside the allowable date range.
- Agent Restricted Action Plan Rule**
Ensure that a user requesting an self-service event is not currently part of a restricted action plan.
- Schedule Performance Rule**
Establish thresholds based on staffing surplus or shortage, and allow self-service requests based on those thresholds.

Include this rule in the validation plan?

Yes, include this rule in the validation plan
▼

How far in advance may users make requests?

3 days in advance
▼

The following business rules may be applied to self-service requests:



- **Schedule Constraints Rule** will deny any request that violates normal schedule constraints rule (start time and duration) for any event type marked as “Is constrained by work.” **Note:** if the event type is not “constrained by work” the validation engine does not evaluate this rule.
- **Date Range Eligibility Rule** If enabled, this will deny any request for outside the date range specified in the validation plan basic properties. If not enabled, an agent could receive approval for a request outside of the date range.
- **Agent Hire Date Restriction Rule** will deny any self-service request initiated by an agent who is currently inside a “new hire” window set up in the agent profile settings | Time off settings | General time off settings.
- **Maximum Date Interval Rule** allows determining how far in advance a given self-service request may be granted. This supports, for example, the ability to restrict self-service requests any further out than two weeks. If included, select the number of days in advance an agent can make a request from same day only, up to 30 days in advance.
- **Agent Restricted Action Plan Rule** will deny any self-service request initiated by an agent who is currently subject to a restricted action plan (RAP) that includes self-service activities.
- **Schedule Performance Rule** allows establishing thresholds based on schedule shortage / surplus (scheduled staff vs. forecasted staffing requirements). Any self-service request that would, for example, drop the staffing shortage below the given threshold would be denied.

Additional options for Schedule performance rule:

Include this rule in the validation plan?

Yes, include this rule in the validation plan ▾

Forecast selection

Use the published forecast ▾

Forecast algorithm selection

Skill-Based Forecasting Methods ▾

Allowable Staffing Variance (in hours):

+1 staffing variance ▾

What is this and how is it calculated? ⓘ

What Activities does the headcount apply to?

Evaluate the staffing variance for ALL assigned activities. ▾

What do these options mean? ⓘ

Save Cancel

Forecast selection: Allows basing the rule on the published forecast or you may select any working forecast.

Forecast algorithm selection: For most leave at *Skill-based forecasting methods*, however, you may change to standard forecasting or manual entry.

Allowable Staffing Variance (in hours): This allows the system to approve or deny the ASSK event based on forecasted staffing variance. The staffing variance is calculated by subtracting the required people from the scheduled people for the duration of the self-service request and



converting that to staffing hours. The application then converts to staffing hours error by dividing the net staffing number by the number of intervals per hour (typically 4). Select from -10 to +15 staffing hour error. Because of the variance in staffing in the net line statistics, this looks at the average over the duration of the event. Selecting +2 or +3 will allow for shrinkage or changes in call volume. Selecting a negative number will allow understaffing for the interval (e.g., for mandatory training when it's OK to miss service level for the interval).

What Activities does the headcount apply to? How should the system account for multi-skilled agents? Select ALL activities or EACH activity. Applying the rule to ALL activities means the staffing net lines are calculated using all activities combined, and the rule will fail if the total net staffing hours error for all activities is below the specified threshold. However, if the rule is applied to EACH activity, the rule will fail if ANY activity has a net staffing hour that is below the specified threshold.

Agent view

To add an event to their schedule, agents navigate to Schedule > Self-service request.

In addition to selecting the event, when making a request the agent must enter:

- Date
- Start and end time
- Description / comment

If the selected event type does not require business rule validation, the event is "approved" and will immediately appear on the published schedule after the agent checks a box to acknowledge the change to their schedule and *Saves*.

Self-Service Request

Provide the following details to complete your request.

Request type

The following table shows the dates of the request and the self-service rule validation results.

| | |
|----------|--|
| 4/3/2023 | |
|----------|--|

I understand that I cannot make any further changes to this self-service request.

Start time
 : :

End time
 : :

Comments

By clicking this box, you acknowledge that saving this self-service request will alter your published schedule. Any further changes to the published schedule must be performed by...

I understand that I cannot make any further changes to this self-service request.



If the selected event type requires business rule validation, then the application validates the request against the applicable business rules.

If **any rule** from **any validation plan** fails, the application will deny the request.

Events that do not pass validation are not placed on a published schedule. Agents are not able to save an event that fails validation but can go back and change the parameters of the request and try again.

Only events that pass validation appear on the agent's published schedule (after acknowledgement and saving by the agent).

Request validation results
Review the results of the runtime validation of your self-service request and then decide if you wish to continue.

The self-service request is denied. See the list below for more details. [49]

The following table shows the dates of the request and the self-service rule validation results.

| Validation status | Rule | Plan name | Comments |
|-------------------|-----------------------------------|------------------------------------|---|
| Failed | Schedule Constraints Rule | | The selected date, duration and event type violates the schedule constraints rule. |
| Passed | Agent Hire Date Restriction Rule | First Quarter 2023 validation plan | You are not currently restricted from making self-service requests due to a hire date restriction. |
| Failed | Maximum Date Interval Rule | First Quarter 2023 validation plan | The selected date for the self-service requests violates the maximum date interval rule. Choose a date closer to today and try again. |
| Passed | Agent Restricted Action Plan Rule | First Quarter 2023 validation plan | You are not currently restricted from making self-service requests due to a Restricted Action Plan. |
| Failed | Schedule Performance Rule | First Quarter 2023 validation plan | The selected date and duration violate the schedule performance rule. |

Request validation results
Review the results of the runtime validation of your self-service request and then decide if you wish to continue.

Good to go! The request is approved and you may save this to your published schedule. [51]

The following table shows the dates of the request and the self-service rule validation results.

| Validation status | Rule | Plan name | Comments |
|-------------------|-----------------------------------|------------------------------------|---|
| Passed | Schedule Constraints Rule | | The selected date and duration does not violate the schedule constraints rule. |
| Passed | Agent Hire Date Restriction Rule | First Quarter 2023 validation plan | You are not currently restricted from making self-service requests due to a hire date restriction. |
| Passed | Maximum Date Interval Rule | First Quarter 2023 validation plan | The selected date falls within the acceptable maximum date interval. |
| Passed | Agent Restricted Action Plan Rule | First Quarter 2023 validation plan | You are not currently restricted from making self-service requests due to a Restricted Action Plan. |
| Passed | Schedule Performance Rule | First Quarter 2023 validation plan | The selected date and duration of the event does not violate the schedule performance rule. |

By clicking this box, you acknowledge that saving this self-service request will alter your published schedule. Any further changes to the published schedule must be performed by you.

I understand that I cannot make any further changes to this self-service request.



How can I tell who has requested/received an ASSK event?

To determine who has added the event type to their schedule, you can run an event review status change report. Navigate to Report > Administrative & utility > Event Review Status Change. One of the options is to *Restrict the report by event types*. Select the ASSK event to see who added the event, and the date and time on their schedule.

Event review status change report

Earliest review date
8/21/2023

Latest review date
8/27/2023

Restrict to agent
-- Do not restrict by agent --

Restrict to reviewing supervisor
-- Do not restrict by reviewing supervisor --

Restrict to a review status
-- Do not restrict by review status id --

Restrict the report by event types
Restrict to a set of event types by event type classification

Time zone selection
Use my default time zone

Generate report

Event type classifications
Agent Self-Service Request
Agent Self-Service Request
Break & Lunch Event
Intra-Day Exception Event
Meeting / Training Event
Pre-Planned Time Off Event
Work Time Event (In Queue)