

# Real-Time Adherence

## Genesys WFM Real-Time Adherence Documentation

### Study Notes

Topic	Description
Real-Time Adherence	Compares actual agent state vs scheduled state
Adherence States	On-queue, breaks, meetings, training, time-off, etc.
Schedule State Groups	Maps Genesys states to scheduled activities
Compliance Tracking	15, 30, or 60-minute interval checking
Reason Codes	Aux codes for secondary classifications
Thresholds	Start Before/After flexibility (minutes)
Multi-Channel	Track adherence per media type separately
Ignore Codes	Activities excluded from adherence calculation

## Navigation

Menu → Workforce Management → Adherence OR Supervisor → Adherence → Adherence Monitoring

## Real-Time Adherence Overview

Real-Time Adherence measures how well agents follow their assigned schedules. It compares each agent's actual real-time state with their scheduled state during each monitoring interval, tracking compliance in real-time throughout the day.

Adherence monitoring enables supervisors to:

- Track agent schedule compliance continuously
- Identify agents not following schedules
- Investigate reasons for non-compliance
- Manage exceptions and unplanned activities
- Generate adherence reports for performance management
- Calculate adherence metrics for coaching and evaluation

## Adherence Objectives

- **Schedule Compliance** - Ensure agents work as scheduled
- **Service Level Support** - Proper staffing for demand
- **Performance Accountability** - Track and measure adherence
- **Issue Identification** - Find patterns and problems
- **Coaching Opportunity** - Address non-compliance with agents
- **Compliance Reporting** - Document adherence for audits

## Key Adherence Concepts

Scheduled State vs Actual State:

Scheduled (from Master Schedule):

- ├ 09:00-12:00: On-Queue Support
- ├ 12:00-13:00: Lunch (Meal)
- ├ 13:00-16:00: On-Queue Support
- ├ 16:00-16:15: Break
- └ 16:15-16:30: After Call Work

Actual (Real-Time State):

- ├ 09:00-09:45: On-Queue ✓ Adherent
- ├ 09:45-10:15: Training ✗ Non-adherent (unscheduled)
- ├ 10:15-12:30: On-Queue △ Late from training (+45 min)
- ├ 12:30-12:50: Lunch ✓ Adherent (within threshold)
- ├ 13:00-15:45: On-Queue ✓ Adherent
- ├ 15:45-16:10: Meeting ✗ Non-adherent (missing break)
- └ 16:10-16:30: After Call Work ✓ Adherent

Overall Adherence for Day:

└─ Compliant Time: 6 hours 15 min

└─ Non-Compliant Time: 1 hour 15 min

└─ Total Shift Time: 7.5 hours

└─ Adherence %:  $(6:15 / 7:30) = 83.3\%$   $\triangle$  Below goal (90%)

# Adherence States

## On-Queue States

Agents are available to handle customer interactions:

On-Queue Activities:

Available/Ready (WaitingForNextCall):

└─ Status: Available for interactions

└─ Duration: Variable (until call arrives)

└─ Adherence: Compliant if scheduled on-queue

└─ Example: Agent in queue waiting for next call

Connected (Connected):

└─ Status: Currently handling interaction

└─ Duration: Call/chat/email duration

└─ Adherence: Compliant if on-queue scheduled

└─ Example: Agent on call with customer

On-Hold (Held):

└─ Status: Customer on hold (agent still active)

└─ Duration: Hold time while processing

└─ Adherence: Compliant if on-queue scheduled

└─ Example: Agent researching issue, customer on hold

Occupied (various):

└─ Status: Agent occupied with interaction

└─ Duration: From connection to end

- └ Adherence: Compliant if on-queue scheduled
- └ Example: Agent handling multiple interactions

# Off-Queue States

Agents not available for customer interactions:

## Off-Queue Activities:

### After Call Work (ACW/AfterCallWork):

- └ Status: Processing after interaction ends
- └ Duration: Wrap-up work time
- └ Adherence: Depends on scheduling
- └ Scheduled: Yes (included in shift)
- └ Example: Agent logging notes after call

### Break (Break):

- └ Status: Scheduled break time
- └ Duration: 15-30 minutes typically
- └ Adherence: Compliant if scheduled break
- └ When: Scheduled time window (10-12am)
- └ Example: Agent on 15-minute break

### Meal/Lunch (Meal):

- └ Status: Lunch or meal period
- └ Duration: 30-60 minutes typically
- └ Adherence: Compliant if scheduled lunch
- └ When: Scheduled lunch window (12-1pm)
- └ Example: Agent on lunch break

### Meeting (Meeting):

- └ Status: Team, coaching, or training meeting
- └ Duration: 30-120 minutes
- └ Adherence: Depends on scheduling (can be exception)
- └ Planned: Usually scheduled in advance
- └ Example: 1-on-1 coaching session

### Training (Training):

- └ Status: Formal training or development

- └ Duration: Hours or days
- └ Adherence: Depends on scheduling
- └ Planned: Scheduled in advance
- └ Example: Product training course

#### Time Off (TimeOff):

- └ Status: Approved absence
- └ Duration: Full shift or partial
- └ Adherence: Compliant if approved time-off
- └ Types: Vacation, sick, personal, unpaid
- └ Example: Approved vacation day

#### Administrative (Administrative):

- └ Status: Admin work, documentation, reports
- └ Duration: 30-60 minutes typically
- └ Adherence: Depends on scheduling
- └ When: Off-peak hours or scheduled
- └ Example: Agent doing filing, reports

## Exception States

### Unplanned or special situations:

#### Exception Activities:

##### Unavailable (Unavailable):

- └ Status: Temporarily unavailable
- └ Reason: Unplanned absence, technical issue, etc.
- └ Duration: Minutes to hours
- └ Adherence: Non-adherent (unplanned)
- └ Example: Agent system down, logged out

##### Coaching/Monitoring (Coaching):

- └ Status: Under supervision or QA review
- └ Duration: Call duration + review
- └ Adherence: Can be scheduled or exception
- └ Purpose: Quality assessment
- └ Example: Supervisor listening to call

#### Idle/Not Ready (Idle):

- └ Status: Logged in but not accepting work
- └ Duration: Variable
- └ Adherence: Non-adherent if not scheduled
- └ Example: Agent between calls, extended idle

#### Marked Time (Marked):

- └ Status: Special marked period
- └ Duration: 15 minutes to hours
- └ Adherence: Depends on configuration
- └ Example: Quality review, special activity

# Schedule State Groups

Schedule State Groups map Genesys real-time states to WFM scheduled states, defining which states are considered compliant with each scheduled activity.

## Schedule State Group Configuration:

Example: Support On-Queue Voice

SSG Name: Support\_OnQueue\_Voice

- └ Media Channel: Voice (or Unspecified)
- └ Associated Real-Time States:
  - | └ WaitingForNextCall
  - | └ Connected
  - | └ Held
  - | └ Occupied
- └ Reason Codes (if applicable):
  - | └ No code required
  - | └ Maps all calls regardless of type
- └ Adherence Rules:
  - | └ Start Before Threshold: 5 minutes
  - | └ Start After Threshold: 5 minutes
  - | └ End Before Threshold: 5 minutes
  - | └ End After Threshold: 5 minutes
- └ Result: Agent compliant if on any of these states within thresholds

# Threshold Configuration

Thresholds define flexibility in start/end times:

Threshold Scenario 1: Strict (0 minutes)

- ├ Scheduled: On-Queue 09:00-13:00
- ├ Start Before: 0 min (must start exactly at 09:00)
- ├ Start After: 0 min (cannot be late)
- ├ Actual: 09:03 (3 minutes late)
- └ Result: ✗ Non-adherent (outside 0-min threshold)

Threshold Scenario 2: Flexible (5 minutes)

- ├ Scheduled: On-Queue 09:00-13:00
- ├ Start Before: 5 min (can start 08:55)
- ├ Start After: 5 min (can start up to 09:05)
- ├ Actual: 09:03 (3 minutes late)
- └ Result: ✓ Adherent (within 5-min threshold)

Threshold Scenario 3: Very Flexible (15 minutes)

- ├ Scheduled: On-Queue 09:00-13:00
- ├ Start Before: 15 min (can start 08:45)
- ├ Start After: 15 min (can start up to 09:15)
- ├ Actual: 09:12 (12 minutes late)
- └ Result: ✓ Adherent (within 15-min threshold)

Best Practice:

- ├ On-Queue activities: 5-10 minutes (reasonable)
- ├ Break/Meal: 10-15 minutes (more lenient)
- ├ Training: 0-5 minutes (strict)

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## Reason Codes (Auxiliary Codes)

Reason codes provide secondary classification for states, tracking why agents are in particular states.

**Common Reason Codes:**

#### Break Reasons:

- └ BRK: Regular break
- └ BRKAT: Break at-will
- └ UNPAID: Unpaid break
- └ PAID: Paid break

#### Absence Reasons:

- └ SICK: Sick leave
- └ VACATION: Vacation
- └ PERSONAL: Personal time
- └ UNPAID: Unpaid time off
- └ JURY: Jury duty
- └ BEREAVEMENT: Bereavement

#### Activity Reasons:

- └ TRAIN: Training
- └ MEET: Meeting
- └ COACH: Coaching
- └ ADMIN: Administrative work
- └ QA: Quality assurance
- └ MGT: Management activity

#### Connection Reasons (Calls):

- └ IN: Inbound call
- └ OUT: Outbound call
- └ TRANSFER: Call transfer
- └ CONFERENCE: Conference call
- └ CALLBACK: Scheduled callback

#### Usage:

- └ Mapped to schedule state groups
- └ Provide detail in adherence reports
- └ Track reasons for non-compliance
- └ Improve accuracy of adherence calculations

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# Single vs Multi-Channel Adherence

# Single-Channel Adherence

Tracking adherence for agents handling one media type:

## Single-Channel Configuration:

Agent: Support\_Agent\_001

└ Media Type: Voice only

└ Scheduled: On-Queue Voice 09:00-17:00

└ At 10:30:

| └ Real-time State: Connected (handling call)

| └ Scheduled State: On-Queue Voice

| └ Mapping: Connected maps to On-Queue ✓

| └ Result: Adherent

|

└ At 14:00:

| └ Real-time State: ACW (after call work)

| └ Scheduled State: On-Queue Voice

| └ Mapping: ACW maps to On-Queue ✓

| └ Result: Adherent

|

└ At 14:45:

└ Real-time State: Meeting (unscheduled)

└ Scheduled State: On-Queue Voice

└ Mapping: Meeting does NOT map to On-Queue ✗

└ Result: Non-adherent

Daily Adherence: 92% (good)

# Multi-Channel Adherence

Tracking adherence when agents handle multiple media types:

## Multi-Channel Configuration:

Agent: Support\_Agent\_002

└ Media Types: Voice + Email (blended)

└ Schedule:

| └ 09:00-13:00: On-Queue (Voice or Email)

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| └─ 13:00-14:00: Lunch
| └─ 14:00-17:00: On-Queue (Voice or Email)
| └─ 17:00-17:30: After Call Work
|
└─ At 10:30 (Voice call):
  | └─ Voice Channel State: Connected
  | └─ Email Channel State: Idle
  | └─ Voice SSG Check: Connected maps to On-Queue ✓
  | └─ Email SSG Check: Idle maps to On-Queue? (No)
  | └─ Overall: Adherent (on Voice, allowed)
  |
  └─ At 11:00 (Email work):
    | └─ Voice Channel State: Available
    | └─ Email Channel State: Occupied
    | └─ Voice SSG Check: Available maps to On-Queue ✓
    | └─ Email SSG Check: Occupied maps to On-Queue ✓
    | └─ Overall: Adherent (both channels compliant)
    |
    └─ At 14:45 (Unscheduled training):
      | └─ Voice Channel State: Training
      | └─ Email Channel State: Training
      | └─ Voice SSG Check: Training ✗ (no mapping)
      | └─ Email SSG Check: Training ✗ (no mapping)
      | └─ Overall: Non-adherent (both channels fail)
```

#### Adherence Details:

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└─ Voice Adherence: 95%
└─ Email Adherence: 94%
└─ Overall Adherence: 92% (both channels must be compliant)
```

#### Key Difference:

- Single-Channel: One adherence percentage (simple)
- Multi-Channel: Separate adherence per channel + overall (complex)

# Adherence Calculation

WFM calculates adherence through a multi-step process:

## Adherence Calculation Steps:

### Step 1: Map Agent State + Reason Code

- ├ Get agent's real-time state
- ├ Get reason code (if any)
- ├ Example: WaitingForNextCall + no code
- └ Create state mapping for comparison

### Step 2: Find Compliant Schedule State Groups

- ├ Look up all SSGs configured for site
- ├ Check which SSGs map to agent's state
- ├ Consider media channel if configured
- ├ Example: "Support\_OnQueue" maps to WaitingForNextCall
- └ Create list of matching SSGs

### Step 3: Get Scheduled States for Agent

- ├ Retrieve agent's current schedule for time interval
- ├ Example: Scheduled for "On-Queue Voice" 10:00-12:00
- ├ If multiple activities: Pick primary
- └ Compare to matched SSGs from Step 2

### Step 4: Check Thresholds

- ├ Did agent start on time? (Start Before/After)
- ├ Did agent end on time? (End Before/After)
- ├ Are they within configured thresholds?
- ├ Example: Within 5-min threshold = compliant
- └ Result: Adherent or Non-adherent

### Step 5: Calculate Result

- ├ If intersection not empty: ✓ Adherent
- ├ If intersection empty: ✗ Non-adherent
- ├ If multiple channels: All must pass
- └ Track non-adherence time in minutes

## Example Execution:

Time: 10:15

- ├ Agent: AGENT\_001
- ├ Real-time State: Connected
- ├ Reason Code: None

- └ Scheduled: On-Queue Voice (10:00-12:00)
- └ SSG Lookup: Connected maps to "On-Queue" ✓
- └ Threshold Check: 10:15 is within start threshold ✓
- └ Result: ✓ ADHERENT
- └ Non-adherence Time: 0 minutes
- └ Added to adherence report as compliant minute

# Adherence Visualization

Real-Time Adherence View Example:

Agent Name	Status	Activity	Duration	Adherence
AGENT_001	✓ Green	Connected	4:32	✓ Adherent
AGENT_002	✓ Green	Available	0:15	✓ Adherent
AGENT_003	△ Yellow	Break	18:30	△ Non-adherent
AGENT_004	✓ Green	Connected	3:12	✓ Adherent
AGENT_005	☐ Red	Meeting	45:00	☐ Severely non-adherent
AGENT_006	✓ Green	ACW	2:05	✓ Adherent
AGENT_007	✓ Green	On-Queue	1:30	✓ Adherent
AGENT_008	△ Yellow	Idle	12:30	△ Non-adherent

Legend:

- ✓ Green = Adherent (within schedule)
- △ Yellow = Non-adherent (off schedule <15 min or 1st alert)
- ☐ Red = Severely non-adherent (off schedule >15 min or 2+ alerts)

# Ignore Codes

Certain activities can be marked "Ignore for Adherence," excluding them from adherence calculations.

**Why Use Ignore Codes:**

## Scenario: Quality Assurance Monitoring

### Standard:

- └ Agent scheduled: On-Queue 09:00-17:00
- └ At 10:00: Supervisor monitors agent call (QA)
- └ Agent state: Quality (being monitored)
- └ Non-adherent: Yes (QA not on schedule)
- └ Problem: Impacts adherence score unfairly

### Solution: Mark QA as "Ignore for Adherence"

- └ Agent scheduled: On-Queue 09:00-17:00
- └ At 10:00: Supervisor monitors agent call (QA)
- └ Agent state: Quality (being monitored)
- └ Non-adherent: No (QA ignored)
- └ Result: QA time doesn't count against adherence ✓

### Example Activities to Ignore:

- └ Quality assurance monitoring
- └ Coaching/training observations
- └ System maintenance time
- └ Emergency situations
- └ Technical outages affecting all agents
- └ Special projects or initiatives

## Configuration:

### Ignore Codes Setup:

Activity Code: QUALITY\_MONITOR

- └ Name: Quality Assurance Monitoring
- └ Category: QA
- └ Mark as: Ignore for Adherence ✓
- └ Schedule State Group: (optional)
- └ Result: Doesn't impact adherence %

Activity Code: SYSTEM\_ISSUE

- └ Name: System Outage
- └ Category: Technical
- └ Mark as: Ignore for Adherence ✓
- └ Schedule State Group: (optional)

└ Result: Doesn't impact adherence %

Usage:

- └ Only for legitimate non-schedule activities
- └ Must be approved by management
- └ Document in policy
- └ Review quarterly for accuracy

# Real-World Scenarios

## Scenario 1: Break Threshold

Agent: AGENT\_033

Schedule: On-Queue 09:00-17:00

Break: Scheduled 10:30-10:45 (15-minute break)

Break Threshold:  $\pm 10$  minutes

Actual:

- └ 10:40: Agent takes break (10 min late)
- └ 10:55: Agent returns (back on-queue)
- └ Duration: 15 minutes (correct)
- └ Start: 10:40 (scheduled 10:30, 10 min late)

Analysis:

- └ Start Threshold:  $\pm 10$  minutes
- └ Actual Start: 10:40 (10 min late)
- └ Within Threshold: Yes ✓
- └ Result: Adherent ✓

If Start Threshold was  $\pm 5$  minutes:

- └ Actual Start: 10:40 (10 min late)
- └ Within Threshold: No ✗
- └ Result: Non-adherent ✗

Lesson: Threshold configuration is critical

# Scenario 2: Unscheduled Training

Agent: AGENT\_115

Schedule: On-Queue Support 09:00-13:00

Actual:

- └ 10:00-10:45: On-Queue (compliant)
- └ 10:45-11:30: Training (emergency product training)
- └ 11:30-13:00: On-Queue (compliant)

Adherence Impact:

- └ Compliant Time: 2:15 (09:00-10:45 + 11:30-13:00)
- └ Non-Compliant Time: 0:45 (training)
- └ Total Time: 4:00
- └ Adherence:  $(2:15 / 4:00) = 56\%$  Non-adherent ✗

Solution Option 1: Schedule Exception

- └ Update master schedule for 10:45-11:30
- └ Mark as "Training - Exception"
- └ Configure SSG to include Training
- └ Result: Would be adherent ✓

Solution Option 2: Ignore Code

- └ Mark "Emergency Training" as Ignore
- └ When agent in training: Doesn't count
- └ Result: Adherence = 100% (training ignored) ✓

Solution Option 3: Coaching

- └ Supervisor counsels agent on schedule
- └ Reinforce adherence importance
- └ Coach on better timing for breaks
- └ Plan to avoid future non-adherence

Best Practice: Combination

- └ Use Solution 1 (schedule exception) immediately
- └ Use Solution 3 (coaching) to prevent future
- └ Use Solution 2 (ignore) only for legitimate reasons

# Best Practices

## Adherence Configuration

- **Clear Rules** - Unambiguous state mappings
- **Realistic Thresholds** - Balance flexibility with accountability
- **Simple Codes** - Easy for agents to understand
- **Documentation** - Maintain mapping diagrams
- **Testing** - Validate configuration in test environment
- **Training** - Teach agents adherence expectations

## Monitoring

- **Regular Review** - Check adherence daily
- **Trend Analysis** - Look for patterns
- **Investigation** - Ask "why?" for outliers
- **Communication** - Share results with team
- **Positive Coaching** - Praise improvements
- **Accountability** - Address chronic issues

## Coaching

- **Empathy** - Understand barriers to adherence
- **Clarity** - Explain why adherence matters
- **Support** - Help with scheduling challenges
- **Consequences** - Clear performance expectations
- **Recognition** - Celebrate good adherence
- **Follow-up** - Track improvements over time

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## Interview Cheat Sheet

Question	Answer
What's real-time adherence?	Compares actual agent state to scheduled state
How often monitored?	15, 30, or 60-minute intervals (configurable)
Yellow status meaning?	Non-adherent or approaching non-adherence

Question	Answer
Red status meaning?	Severely non-adherent (significantly off schedule)
What's threshold?	Flexibility in start/end time (e.g., $\pm 5$ min)
Adherence calculation?	Map real-time state to schedule state, check threshold
Reason codes?	Aux codes for secondary classification
Schedule state group?	Maps Genesys states to scheduled activities
Multi-channel adherence?	Track adherence per media type separately
What's ignore code?	Activity excluded from adherence calculation
Common non-adherence?	Unscheduled breaks, late returns, unplanned training
How improve adherence?	Clear rules, thresholds, coaching, support
Impacts of poor adherence?	Service level failure, staffing gaps, customer impact
Exception handling?	Can be scheduled or handled with ignore codes
Reporting adherence?	Daily/weekly reports by agent/team/site

## Key Takeaways

- **Continuous Tracking** - Real-time monitoring throughout day
- **State Mapping** - Clear mapping of actual to scheduled states
- **Threshold Flexibility** - Balance accountability with realism
- **Multi-Channel** - Support for blended agent work
- **Reason Codes** - Detailed tracking of why agents are off-schedule
- **Ignore Codes** - Exclude legitimate exceptions
- **Visualization** - Color-coding for quick status assessment
- **Coaching Opportunity** - Address issues with support and empathy
- **Service Impact** - Poor adherence damages service levels
- **Policy Enforcement** - Consistent application of rules

## Additional Resources

### Official Documentation

- Adherence: [all.docs.genesys.com/PEC-WFM/Current/Supervisor/AdherenceMdl](https://all.docs.genesys.com/PEC-WFM/Current/Supervisor/AdherenceMdl)
- Schedule State Groups: [all.docs.genesys.com/PEC-WFM/Current/Administrator/CfgAdhRIs](https://all.docs.genesys.com/PEC-WFM/Current/Administrator/CfgAdhRIs)

- Adherence Calculation: [docs.genesys.com/Documentation/WM/latest/SHelp/AdhrCalcs](https://docs.genesys.com/Documentation/WM/latest/SHelp/AdhrCalcs)

# Support & Training

- Genesys University: [genesys.com/training](https://genesys.com/training)
  - Community Forums: <https://community.genesys.com>
  - Technical Support: <https://support.genesys.com>
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