# CommunityWFM 5.0 Report Pack

A review of reports available in CommunityWFM 5.0
Version: October 13, 2021

CommunityWFM

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## About this Document

The objective of this document is to provide an overview of the standard historical, forecast, and daily reports available in the latest version of CommunityWFM. Please note that many reports have multiple viewing options as well as selectable and filtering criteria. The total number of reports available is many times greater than the reports reviewed in this document.

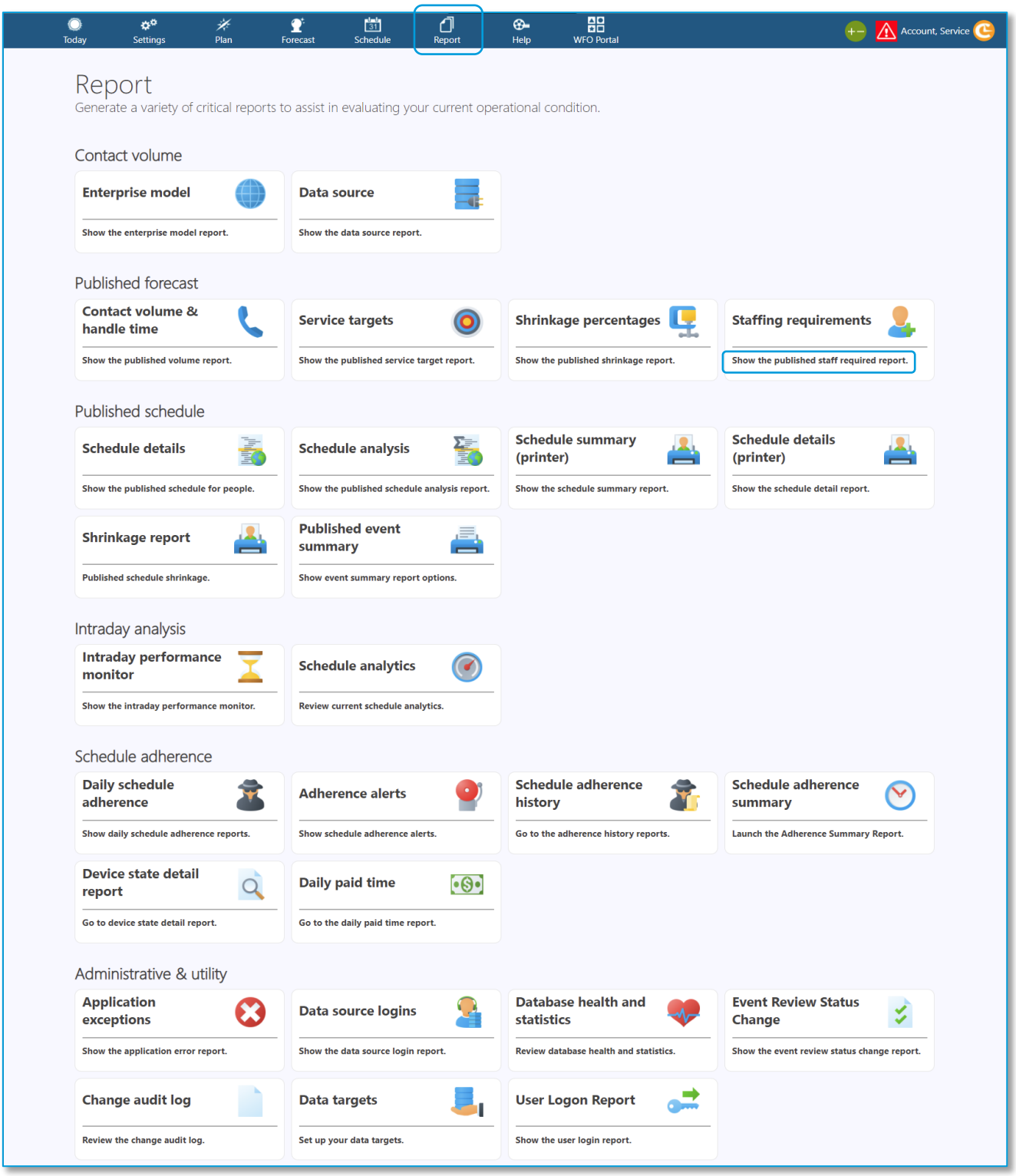
Many reports have multiple levels, from an executive summary down to the daily details, all easily accessible with filters on the page. Additionally, reports may be exported in the form of a .csv or .xlsx file for additional manipulation.

Data Targets, an optional module, allows reports to be customized and scheduled for export to reporting repositories or 3rd party solutions such as payroll.

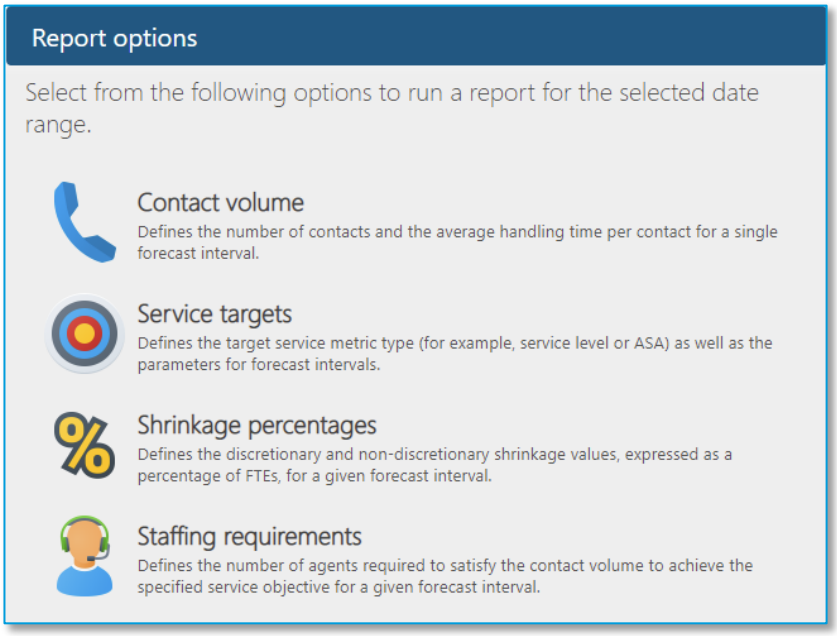
We start with an overview of the primary categories of reports, then dive deeper into the options.

# Overview of Reports Tab

Access many frequently used reports from a central location—the Reports tab. You can run the same reports from the work areas. For example, run a published forecast staffing requirements report from here, or from Forecast > Published forecast > Generate forecast reports.



# Overview of Forecast Reports




## Contact Volume options

**Total** Forecast Contacts by—

- Date
- Interval
- Day of Week
- Week
- Month
- Activity Type
- Media Type

**Average** Forecast Contacts by—

- Interval
- Day of Week
- Month

## Service Target options

- Average Speed to Answer
- Deferred Service Level
- Service Level

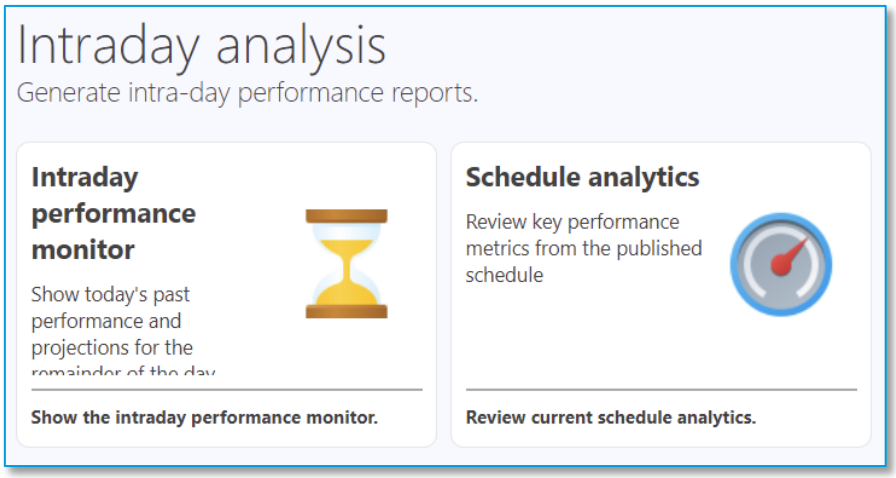
## Shrinkage Percentages

- Date
- Interval
- Day of Week
- Week
- Forecast Month
- Month
- Activity Type
- Media Type

## Staffing Requirements

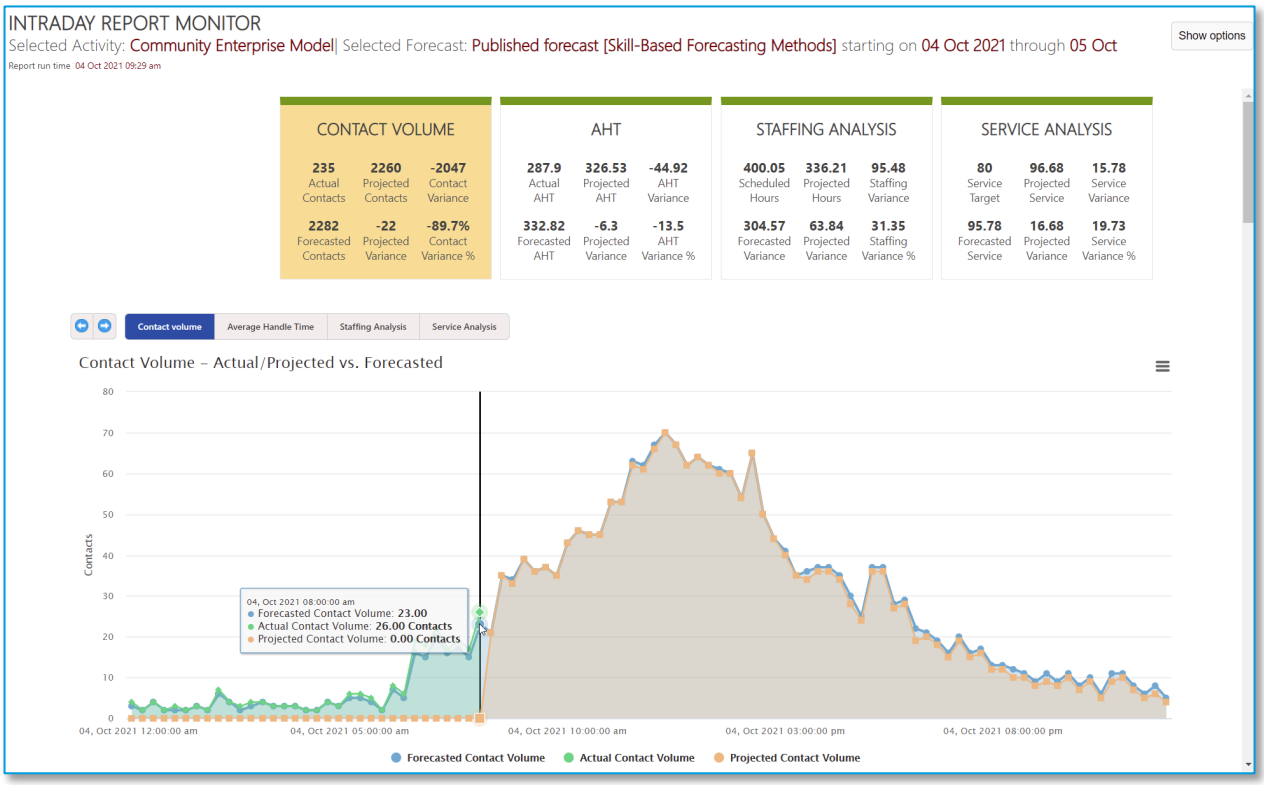
- Date
- Week
- Month (Total)
- Month (Average)

# Overview of Intraday analysis



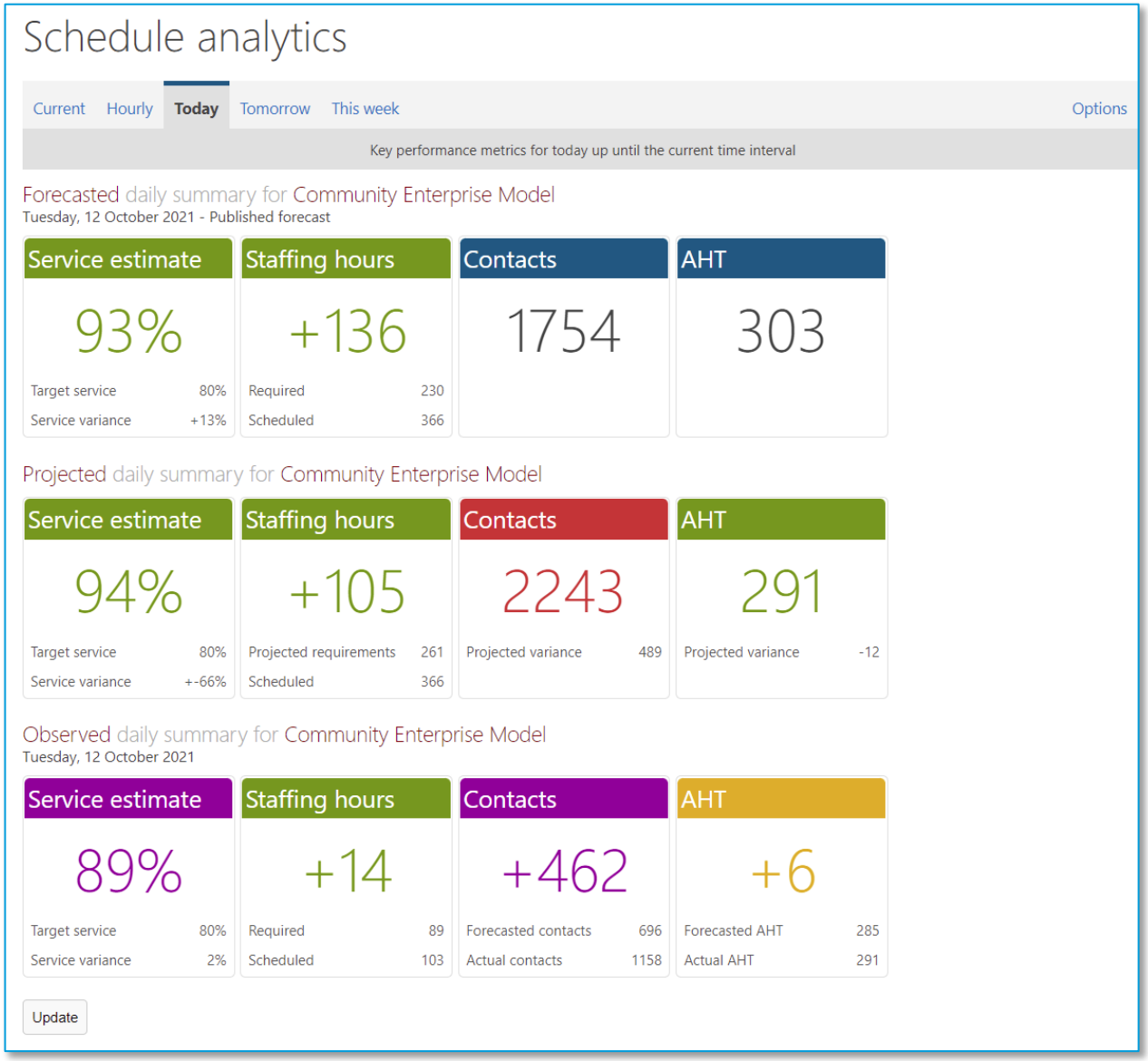

## Intraday performance monitor

View today's forecasted/actual/projected contact volume, AHT, staffing analysis, and service analysis.



## Schedule analytics

View analysis based on current, hourly, today, tomorrow, and this week projections.



# Overview of Published Schedule Reports

Analysis, summary, utility, and printer-friendly reports based on and accessible within the published schedule.

**Schedule Analysis & Summary Reports**

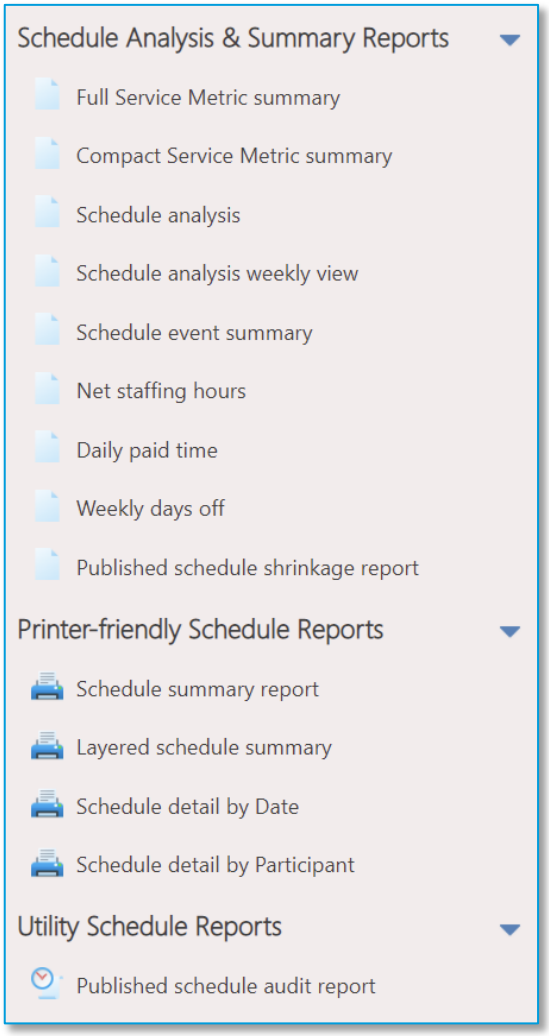
- Full Service Metric summary
- Compact Service Metric summary
- Schedule analysis
- Schedule analysis weekly view
- Schedule event summary
- Net staffing hours
- Daily paid time
- Weekly days off
- Published schedule shrinkage report

**Printer-friendly Schedule Reports**

- Schedule summary report
- Layered schedule summary
- Schedule detail by Date
- Schedule detail by Participant

**Utility Schedule Reports**

- Published schedule audit report



# Contact Volume

## Historical

Use these reports to analyze your data for arrival patterns and forecasting. Analyze by data source or an activity in the Enterprise Model.

### Reports by Data Source

This report shows trends and provides data for analysis of your arrival patterns. Includes contact volume and average handle time from one or more collection points or imported from an Excel worksheet.

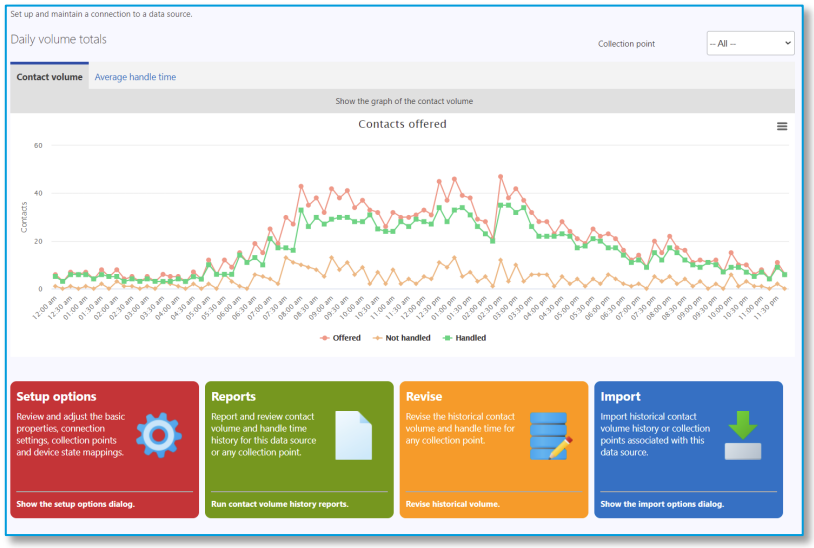
### Contact Volume options

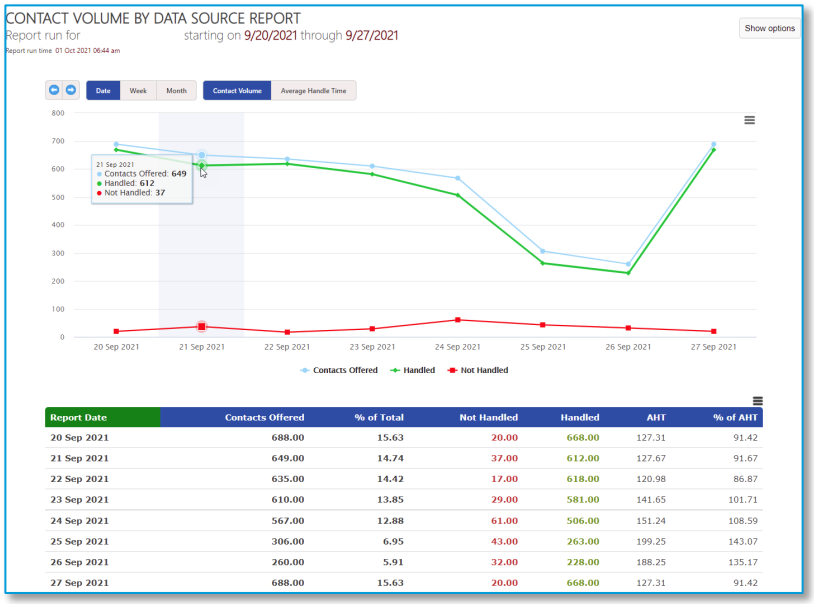
**Total** contact volume by—

- Date
- Interval
- Day of Week
- Week
- Month
- Collection Point

**Average** contact volume by—

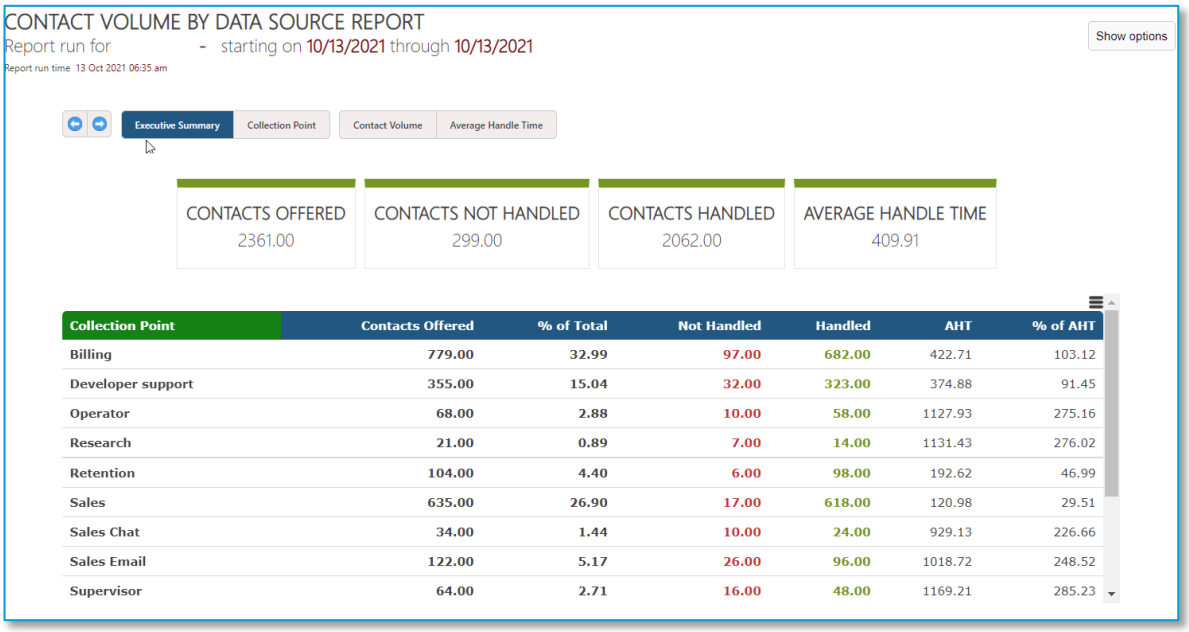
- Interval
- Day of Week
- Month
- Collection Points



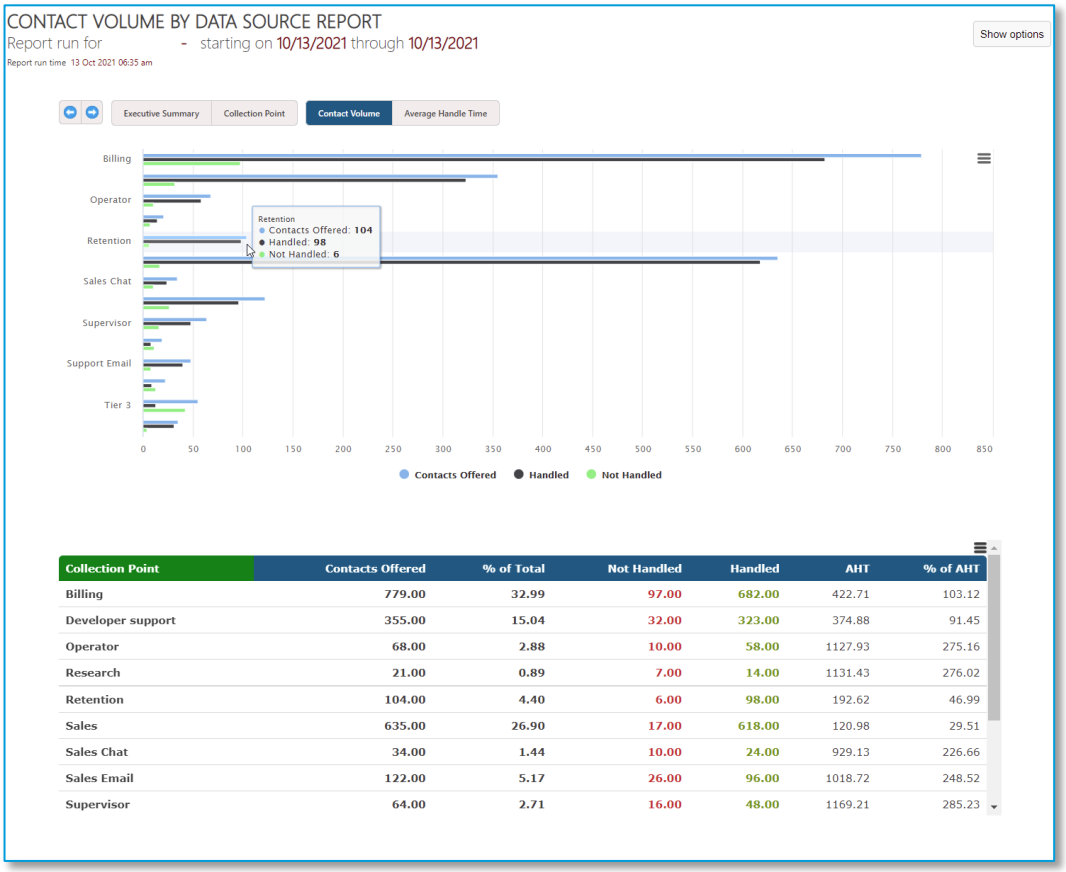




| Report Date | Contacts Offered | % of Total | Not Handled | Handled | AHT | % of AHT |
|---|---|---|---|---|---|---|
| 20 Sep 2021 | 688.00 | 15.63 | 20.00 | 668.00 | 127.31 | 91.42 |
| 21 Sep 2021 | 649.00 | 14.74 | 37.00 | 612.00 | 127.67 | 91.67 |
| 22 Sep 2021 | 635.00 | 14.42 | 17.00 | 618.00 | 120.98 | 86.87 |
| 23 Sep 2021 | 610.00 | 13.85 | 29.00 | 581.00 | 141.65 | 101.71 |
| 24 Sep 2021 | 567.00 | 12.88 | 61.00 | 506.00 | 151.24 | 108.59 |
| 25 Sep 2021 | 306.00 | 6.95 | 43.00 | 263.00 | 199.25 | 143.07 |
| 26 Sep 2021 | 260.00 | 5.91 | 32.00 | 228.00 | 188.25 | 135.17 |
| 27 Sep 2021 | 688.00 | 15.63 | 20.00 | 668.00 | 127.31 | 91.42 |

View totals or averages, by date, interval, day of week, collection point, from executive summary to details.




| Collection Point | Contacts Offered | % of Total | Not Handled | Handled | AHT | % of AHT |
|---|---|---|---|---|---|---|
| Billing | 779.00 | 32.99 | 97.00 | 682.00 | 422.71 | 103.12 |
| Developer support | 355.00 | 15.04 | 32.00 | 323.00 | 374.88 | 91.45 |
| Operator | 68.00 | 2.88 | 10.00 | 58.00 | 1127.93 | 275.16 |
| Research | 21.00 | 0.89 | 7.00 | 14.00 | 1131.43 | 276.02 |
| Retention | 104.00 | 4.40 | 6.00 | 98.00 | 192.62 | 46.99 |
| Sales | 635.00 | 26.90 | 17.00 | 618.00 | 120.98 | 29.51 |
| Sales Chat | 34.00 | 1.44 | 10.00 | 24.00 | 929.13 | 226.66 |
| Sales Email | 122.00 | 5.17 | 26.00 | 96.00 | 1018.72 | 248.52 |
| Supervisor | 64.00 | 2.71 | 16.00 | 48.00 | 1169.21 | 285.23 |




| Collection Point | Contacts Offered | % of Total | Not Handled | Handled | AHT | % of AHT |
|---|---|---|---|---|---|---|
| Billing | 779.00 | 32.99 | 97.00 | 682.00 | 422.71 | 103.12 |
| Developer support | 355.00 | 15.04 | 32.00 | 323.00 | 374.88 | 91.45 |
| Operator | 68.00 | 2.88 | 10.00 | 58.00 | 1127.93 | 275.16 |
| Research | 21.00 | 0.89 | 7.00 | 14.00 | 1131.43 | 276.02 |
| Retention | 104.00 | 4.40 | 6.00 | 98.00 | 192.62 | 46.99 |
| Sales | 635.00 | 26.90 | 17.00 | 618.00 | 120.98 | 29.51 |
| Sales Chat | 34.00 | 1.44 | 10.00 | 24.00 | 929.13 | 226.66 |
| Sales Email | 122.00 | 5.17 | 26.00 | 96.00 | 1018.72 | 248.52 |
| Supervisor | 64.00 | 2.71 | 16.00 | 48.00 | 1169.21 | 285.23 |

## Reports by Enterprise Model

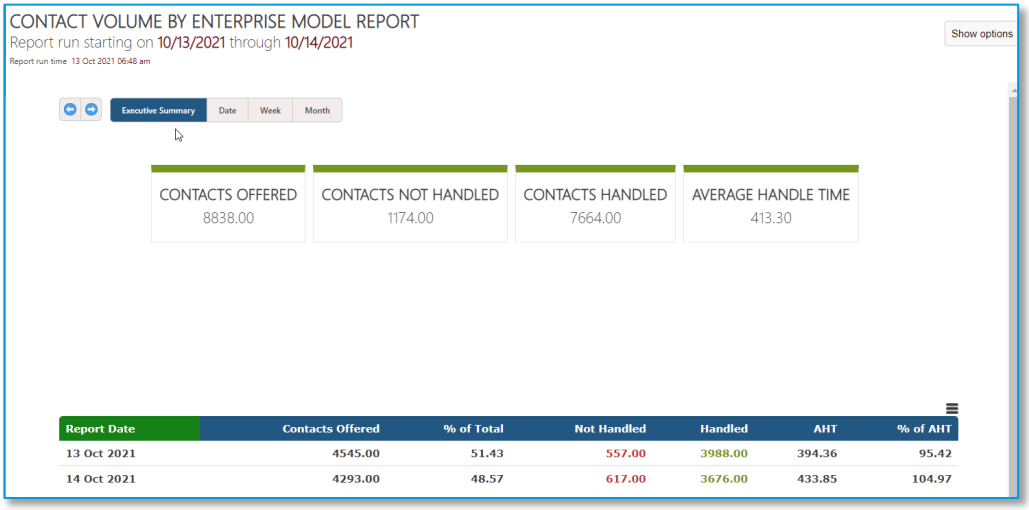
### Contact Volume options

**Total** contact volume by—

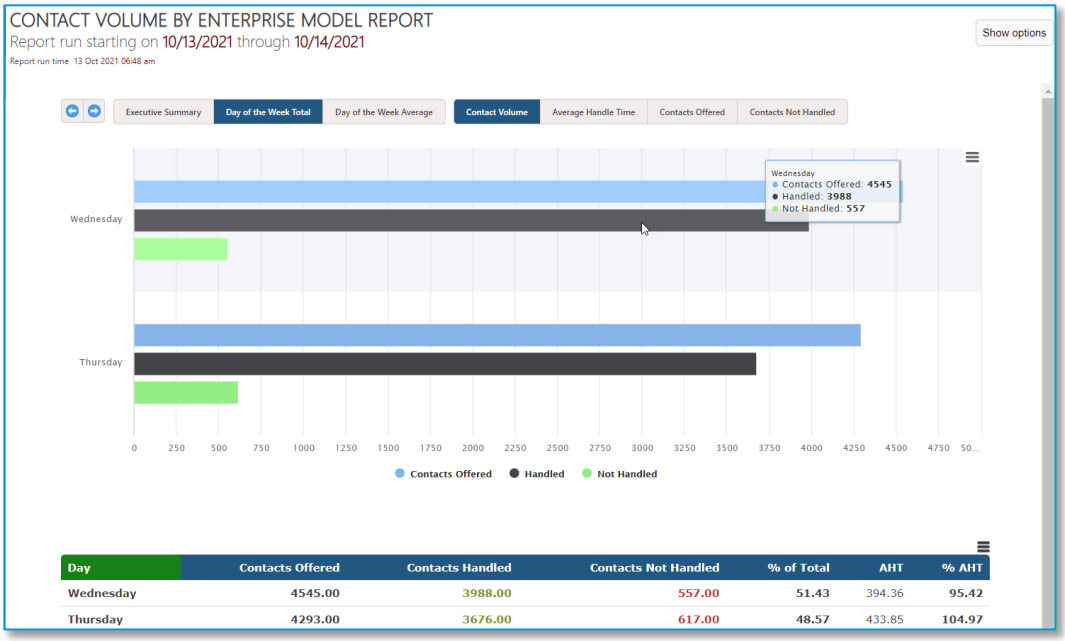
- Date
- Interval
- Day of Week
- Week
- Month
- Site, Folder, or Activity
- Media type

**Average** contact volume by—

- Interval
- Day of Week
- Month
- Site, Folder, or Activity
- Media type




| Report Date | Contacts Offered | % of Total | Not Handled | Handled | AHT | % of AHT |
|---|---|---|---|---|---|---|
| 13 Oct 2021 | 4545.00 | 51.43 | 557.00 | 3988.00 | 394.36 | 95.42 |
| 14 Oct 2021 | 4293.00 | 48.57 | 617.00 | 3676.00 | 433.85 | 104.97 |




| Day | Contacts Offered | Contacts Handled | Contacts Not Handled | % of Total | AHT | % AHT |
|---|---|---|---|---|---|---|
| Wednesday | 4545.00 | 3988.00 | 557.00 | 51.43 | 394.36 | 95.42 |
| Thursday | 4293.00 | 3676.00 | 617.00 | 48.57 | 433.85 | 104.97 |

## Forecast

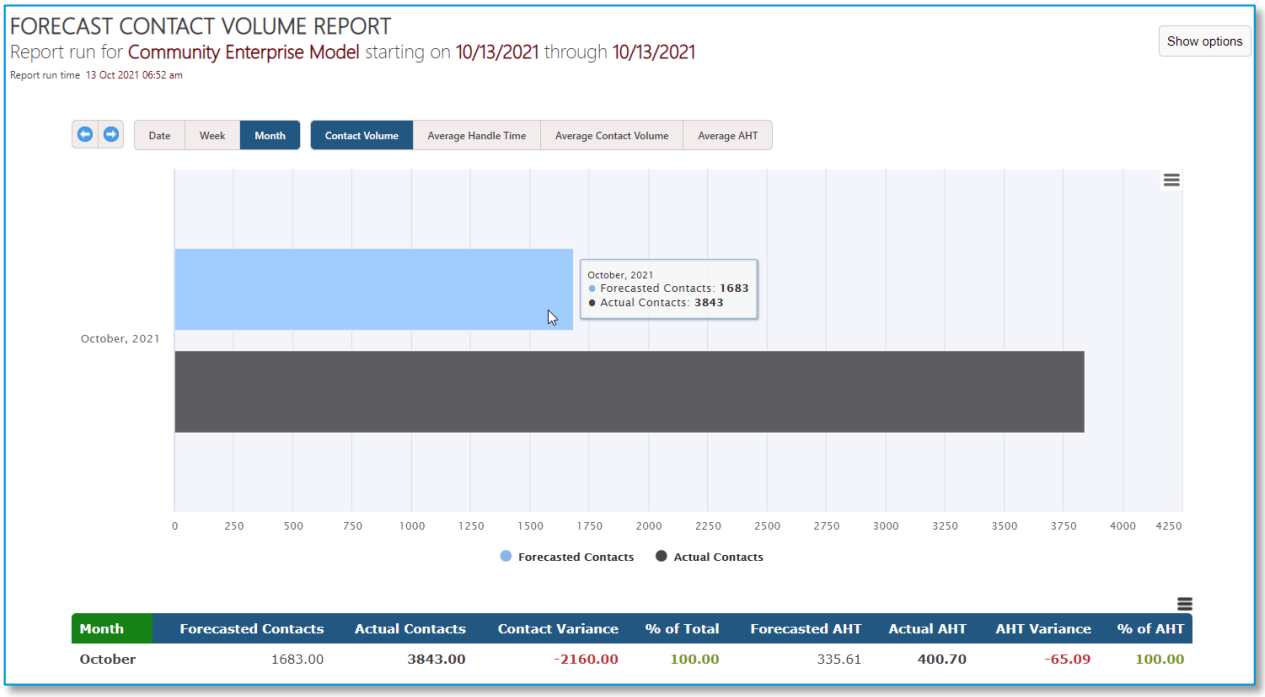
Create your forecast with historical contact volume data and analyze your forecast accuracy.

**Total** Forecast Contacts by—

- Date
- Interval
- Day of Week
- Week
- Month
- Activity Type
- Media Type

**Average** Forecast Contacts by—

- Interval
- Day of Week
- Month




| Month | Forecasted Contacts | Actual Contacts | Contact Variance | % of Total | Forecasted AHT | Actual AHT | AHT Variance | % of AHT |
|---|---|---|---|---|---|---|---|---|
| October | 1683.00 | 3843.00 | -2160.00 | 100.00 | 335.61 | 400.70 | -65.09 | 100.00 |

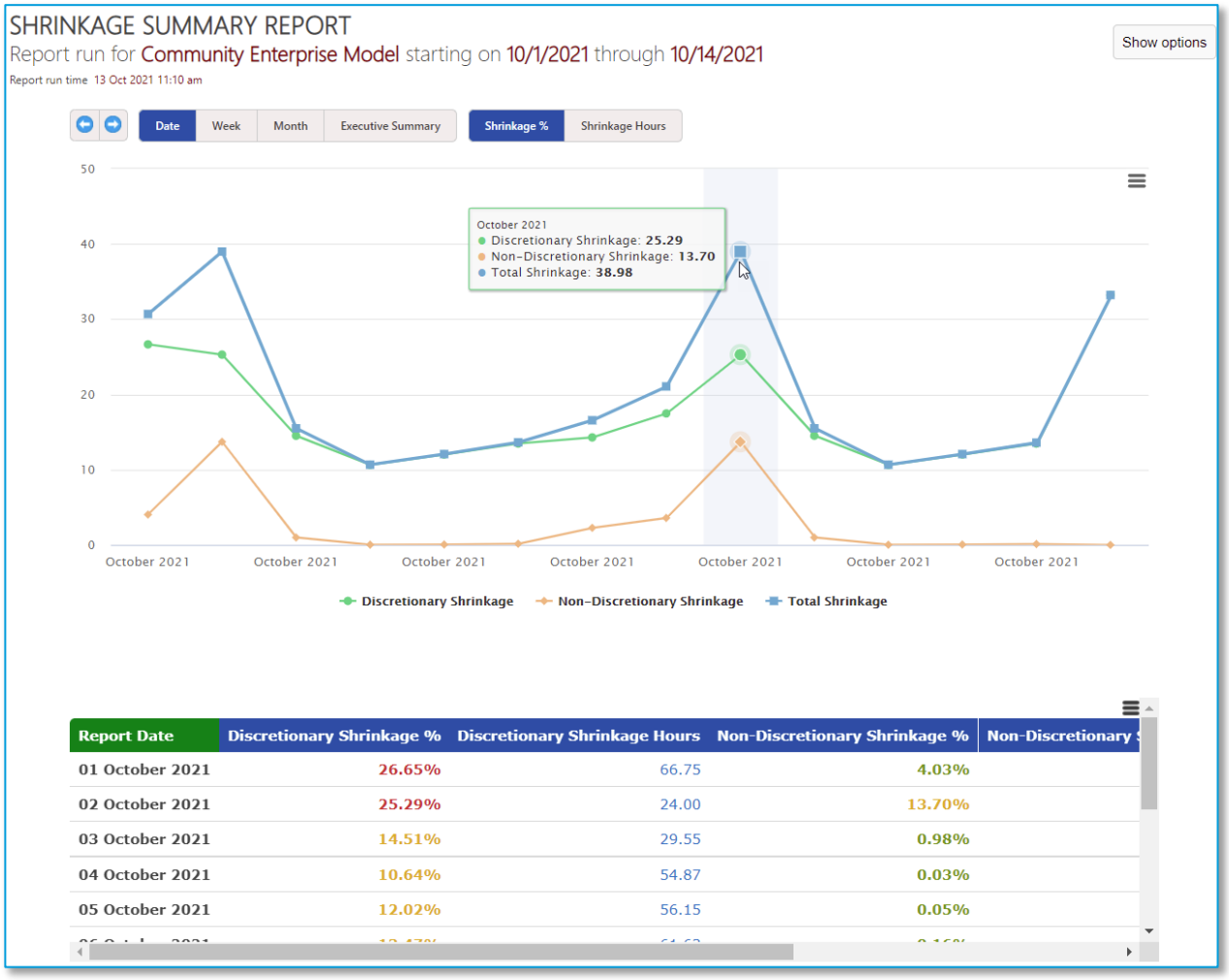
# Shrinkage

New in 5.0, use shrinkage reports to analyze, forecast with, and report on discretionary and non-discretionary shrinkage.

## Published schedule shrinkage

Display by shrinkage percent or shrinkage hours.

- % Executive Summary
- % Date
- % Week
- % Month

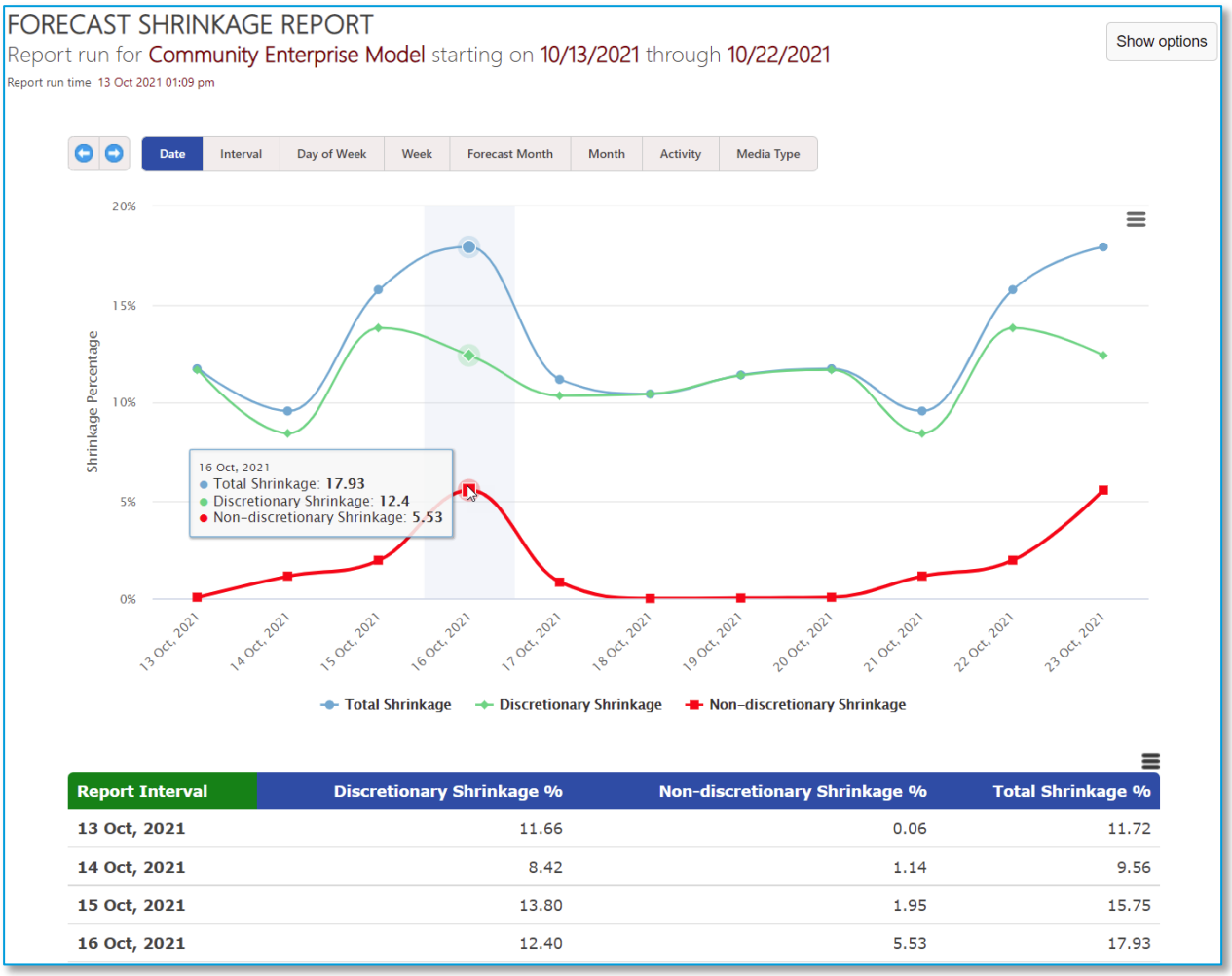



| Report Date | Discretionary Shrinkage % | Discretionary Shrinkage Hours | Non-Discretionary Shrinkage % | Non-Discretionary |
|---|---|---|---|---|
| 01 October 2021 | 26.65% | 66.75 | 4.03% | |
| 02 October 2021 | 25.29% | 24.00 | 13.70% | |
| 03 October 2021 | 14.51% | 29.55 | 0.98% | |
| 04 October 2021 | 10.64% | 54.87 | 0.03% | |
| 05 October 2021 | 12.02% | 56.15 | 0.05% | |

# Published forecast shrinkage

Results based on the published forecast.

- Date
- Interval
- Day of Week
- Week
- Forecast Month
- Month
- Activity
- Media Type




| Report Interval | Discretionary Shrinkage % | Non-discretionary Shrinkage % | Total Shrinkage % |
|---|---|---|---|
| 13 Oct, 2021 | 11.66 | 0.06 | 11.72 |
| 14 Oct, 2021 | 8.42 | 1.14 | 9.56 |
| 15 Oct, 2021 | 13.80 | 1.95 | 15.75 |
| 16 Oct, 2021 | 12.40 | 5.53 | 17.93 |

# Staffing Requirements

## Historical

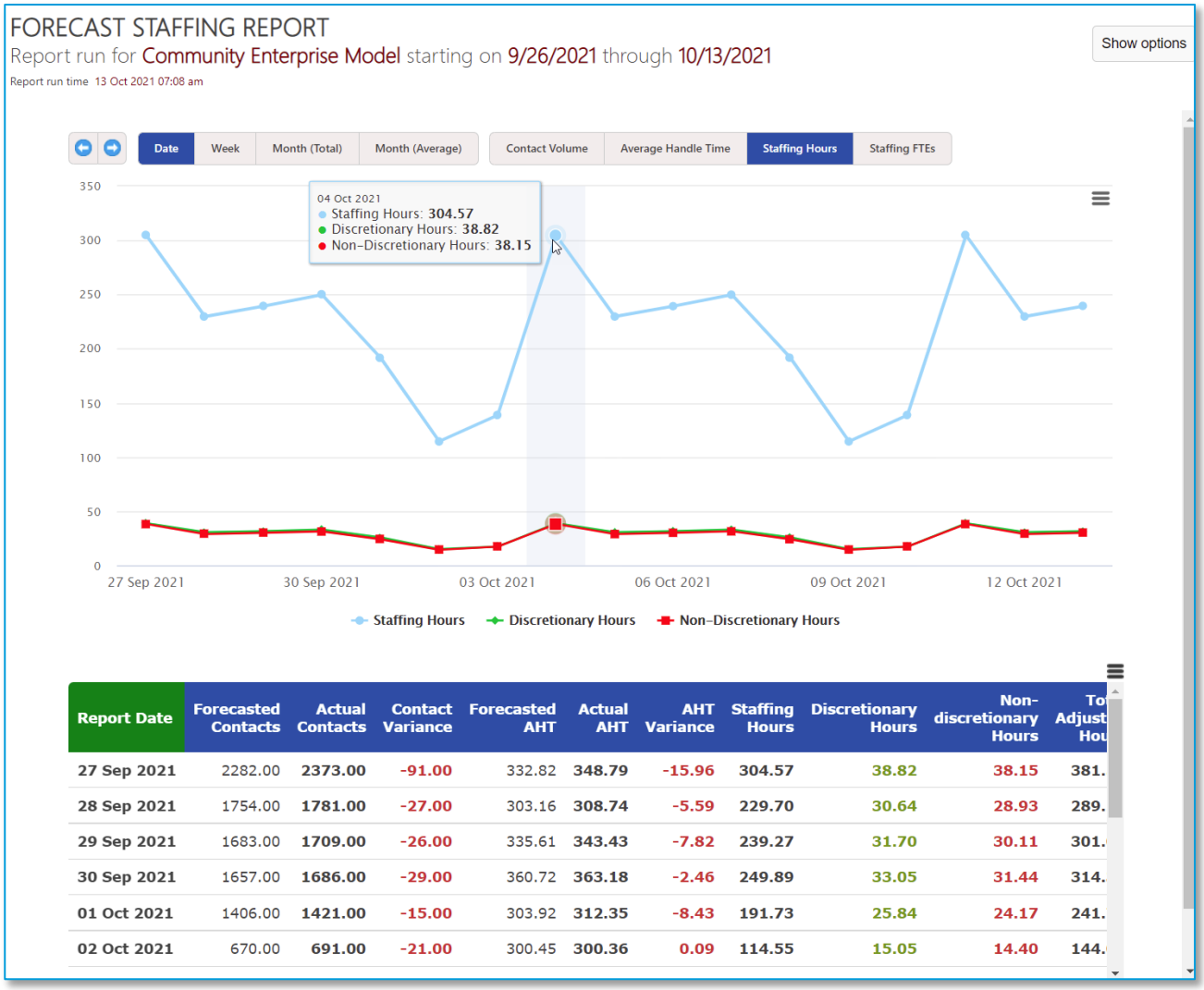
This includes forecasted requirements based on contact volume, handle time, service target, and shrinkage.

Enter a date range to see historical data by:

- Date
- Week
- Month (Total)
- Month (Average)

Filter by:

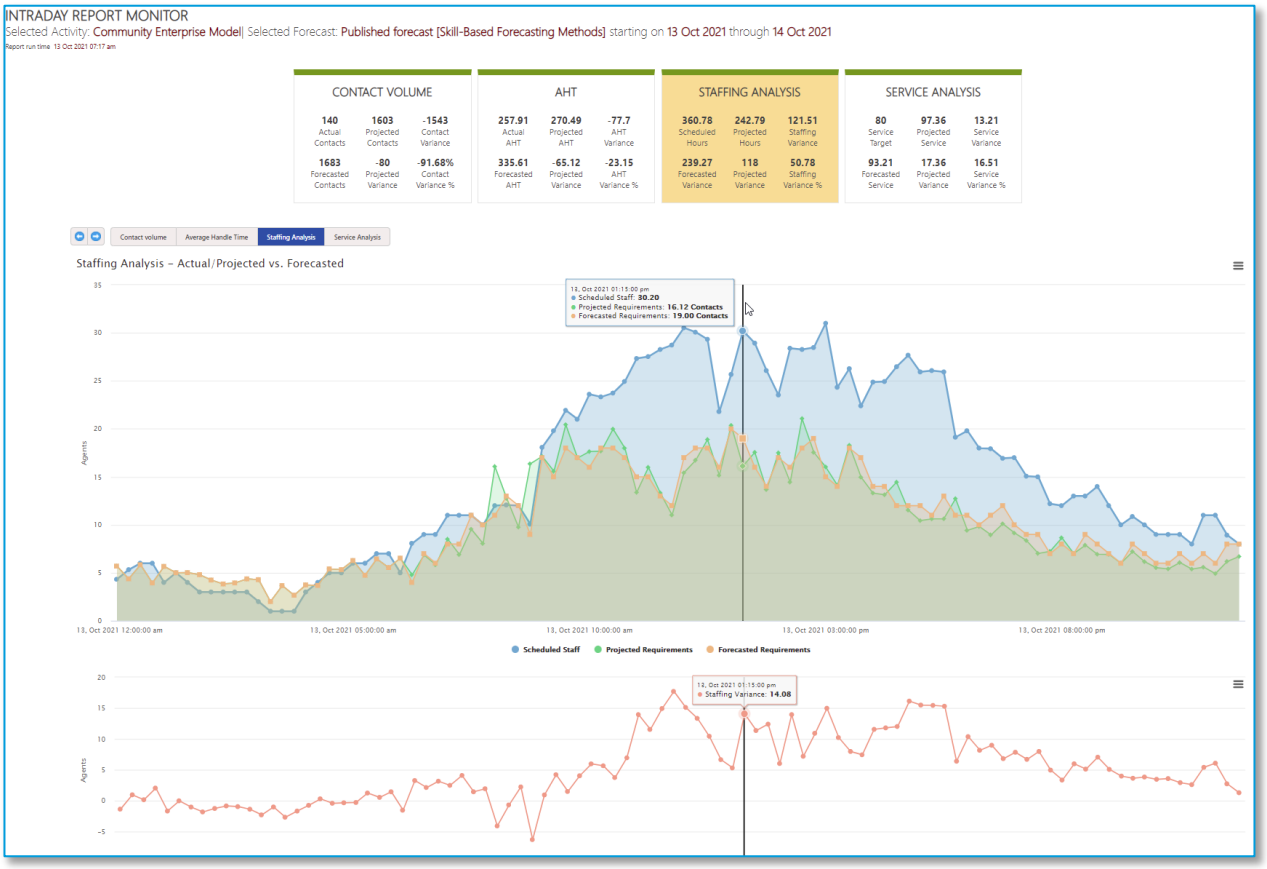
- Date
- Interval
- Days
- Miscellaneous

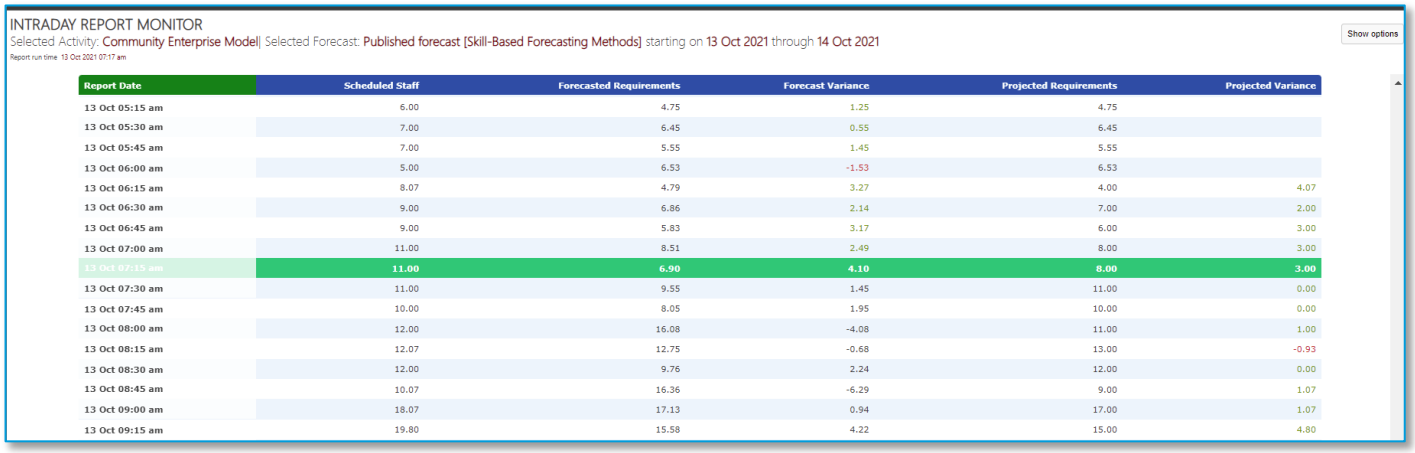



| Report Date | Forecasted Contacts | Actual Contacts | Contact Variance | Forecasted AHT | Actual AHT | AHT Variance | Staffing Hours | Discretionary Hours | Non-discretionary Hours | To Adjust Hou |
|---|---|---|---|---|---|---|---|---|---|---|
| 27 Sep 2021 | 2282.00 | 2373.00 | -91.00 | 332.82 | 348.79 | -15.96 | 304.57 | 38.82 | 38.15 | 381. |
| 28 Sep 2021 | 1754.00 | 1781.00 | -27.00 | 303.16 | 308.74 | -5.59 | 229.70 | 30.64 | 28.93 | 289. |
| 29 Sep 2021 | 1683.00 | 1709.00 | -26.00 | 335.61 | 343.43 | -7.82 | 239.27 | 31.70 | 30.11 | 301. |
| 30 Sep 2021 | 1657.00 | 1686.00 | -29.00 | 360.72 | 363.18 | -2.46 | 249.89 | 33.05 | 31.44 | 314. |
| 01 Oct 2021 | 1406.00 | 1421.00 | -15.00 | 303.92 | 312.35 | -8.43 | 191.73 | 25.84 | 24.17 | 241. |
| 02 Oct 2021 | 670.00 | 691.00 | -21.00 | 300.45 | 300.36 | 0.09 | 114.55 | 15.05 | 14.40 | 144. |

## Daily

The intraday performance monitor allows you to see the forecasted, actual, and projected staffing requirements. Run this report on a working forecast or a published forecast. In the table, view the current hour and projections for the rest of the day.



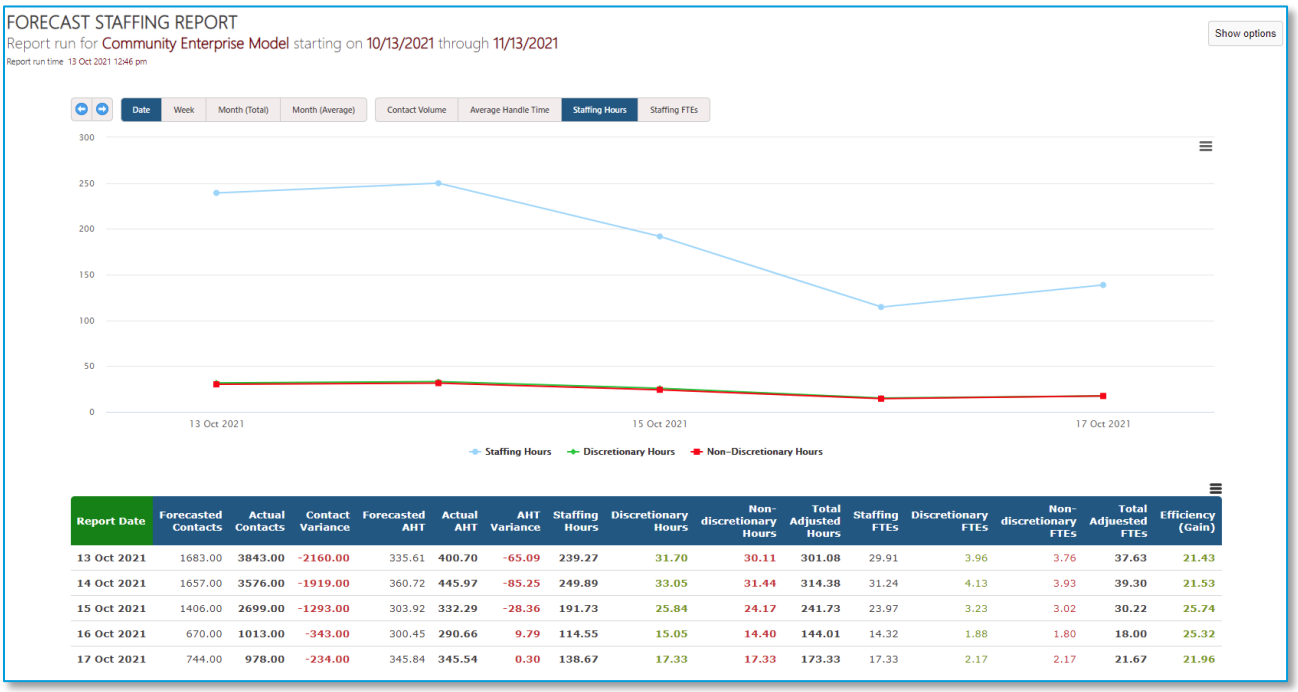



INTRADAY REPORT MONITOR
Selected Activity: Community Enterprise Model| Selected Forecast: Published forecast [Skill-Based Forecasting Methods] starting on 13 Oct 2021 through 14 Oct 2021
Report run time 13 Oct 2021 07:17 am
Show options

| Report Date | Scheduled Staff | Forecasted Requirements | Forecast Variance | Projected Requirements | Projected Variance |
|---|---|---|---|---|---|
| 13 Oct 05:15 am | 6.00 | 4.75 | 1.25 | 4.75 | |
| 13 Oct 05:30 am | 7.00 | 6.45 | 0.55 | 6.45 | |
| 13 Oct 05:45 am | 7.00 | 5.55 | 1.45 | 5.55 | |
| 13 Oct 06:00 am | 5.00 | 6.53 | -1.53 | 6.53 | |
| 13 Oct 06:15 am | 8.07 | 4.79 | 3.27 | 4.00 | 4.07 |
| 13 Oct 06:30 am | 9.00 | 6.86 | 2.14 | 7.00 | 2.00 |
| 13 Oct 06:45 am | 9.00 | 5.83 | 3.17 | 6.00 | 3.00 |
| 13 Oct 07:00 am | 11.00 | 8.51 | 2.49 | 8.00 | 3.00 |
| 13 Oct 07:15 am | 11.00 | 6.90 | 4.10 | 8.00 | 3.00 |
| 13 Oct 07:30 am | 11.00 | 9.55 | 1.45 | 11.00 | 0.00 |
| 13 Oct 07:45 am | 10.00 | 8.05 | 1.95 | 10.00 | 0.00 |
| 13 Oct 08:00 am | 12.00 | 16.08 | -4.08 | 11.00 | 1.00 |
| 13 Oct 08:15 am | 12.07 | 12.75 | -0.68 | 13.00 | -0.93 |
| 13 Oct 08:30 am | 12.00 | 9.76 | 2.24 | 12.00 | 0.00 |
| 13 Oct 08:45 am | 10.07 | 16.36 | -6.29 | 9.00 | 1.07 |
| 13 Oct 09:00 am | 18.07 | 17.13 | 0.94 | 17.00 | 1.07 |
| 13 Oct 09:15 am | 19.80 | 15.58 | 4.22 | 15.00 | 4.80 |

## Forecast

There are three places where you can view a forecast for staffing requirements: in a working forecast, the published forecast, or the intraday performance monitor.




| Report Date | Forecasted Contacts | Actual Contacts | Contact Variance | Forecasted AHT | Actual AHT | AHT Variance | Staffing Hours | Discretionary Hours | Non-discretionary Hours | Total Adjusted Hours | Staffing FTEs | Discretionary FTEs | Non-discretionary FTEs | Total Adjusted FTEs | Efficiency (Gain) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 13 Oct 2021 | 1683.00 | 3843.00 | -2160.00 | 335.61 | 400.70 | -65.09 | 239.27 | 31.70 | 30.11 | 301.08 | 29.91 | 3.96 | 3.76 | 37.63 | 21.43 |
| 14 Oct 2021 | 1657.00 | 3576.00 | -1919.00 | 360.72 | 445.97 | -85.25 | 249.89 | 33.05 | 31.44 | 314.38 | 31.24 | 4.13 | 3.93 | 39.30 | 21.53 |
| 15 Oct 2021 | 1406.00 | 2699.00 | -1293.00 | 303.92 | 332.29 | -28.36 | 191.73 | 25.84 | 24.17 | 241.73 | 23.97 | 3.23 | 3.02 | 30.22 | 25.74 |
| 16 Oct 2021 | 670.00 | 1013.00 | -343.00 | 300.45 | 290.66 | 9.79 | 114.55 | 15.05 | 14.40 | 144.01 | 14.32 | 1.88 | 1.80 | 18.00 | 25.32 |
| 17 Oct 2021 | 744.00 | 978.00 | -234.00 | 345.84 | 345.54 | 0.30 | 138.67 | 17.33 | 17.33 | 173.33 | 17.33 | 2.17 | 2.17 | 21.67 | 21.96 |

# Published Schedules

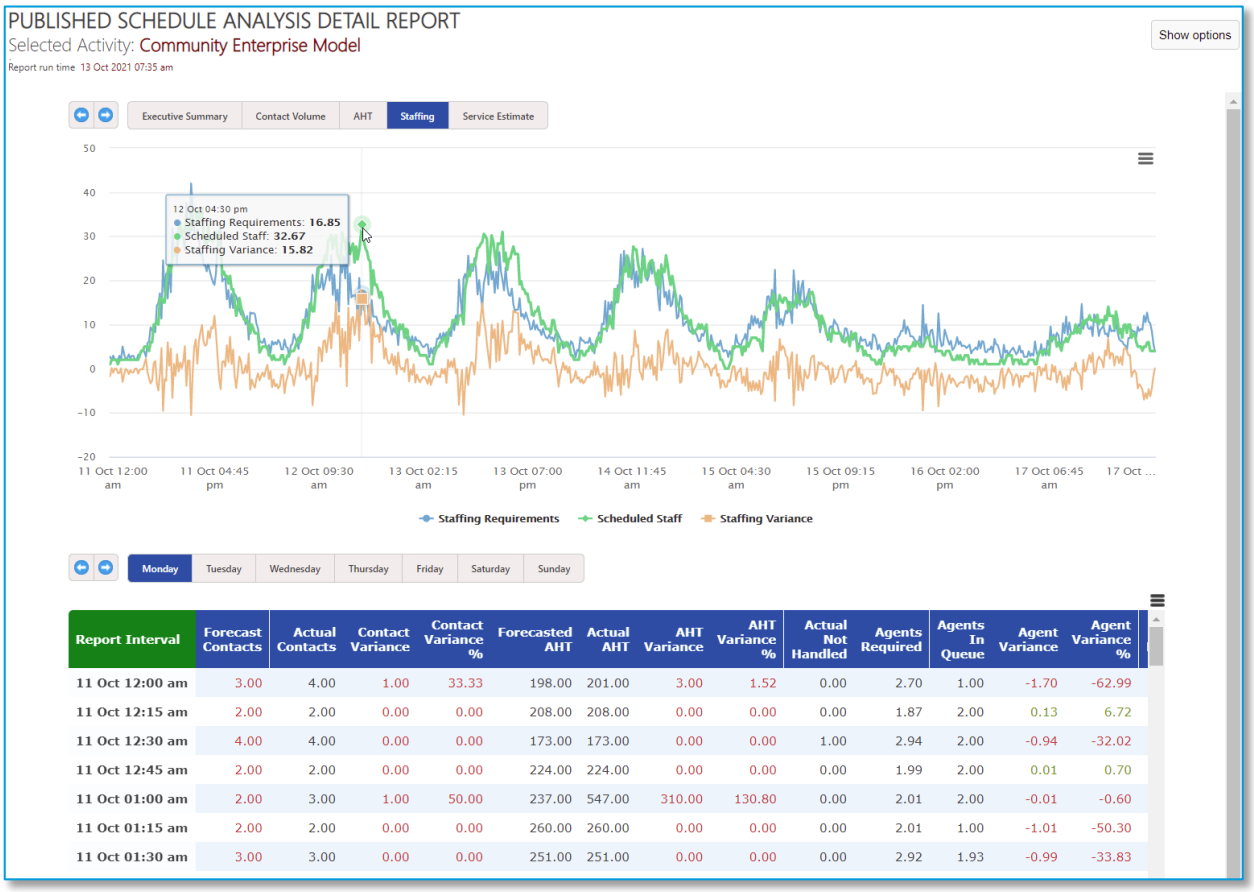
Use the published schedule report to see your coverage on a daily basis. By day and interval, you can see if you have enough staff to meet your service level.

View published schedules in the published schedule report and adherence report. There are also several printer-friendly reports.

## Historical

Use the published schedule analysis detail report to compare your forecast to actuals. You can use this report to make informed decisions about upcoming forecasts.

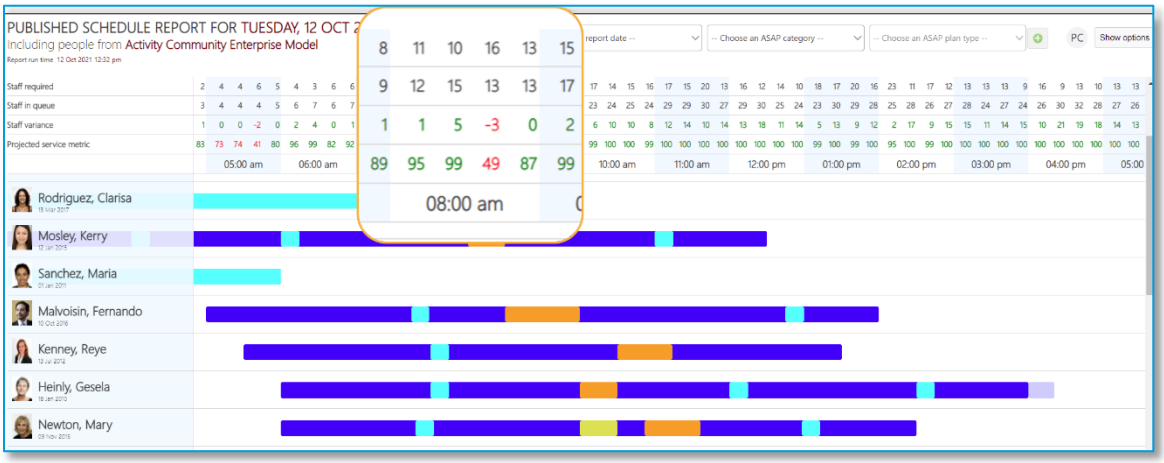
- Executive summary
- Contact volume
- AHT
- Staffing
- Service estimate




| Report Interval | Forecast Contacts | Actual Contacts | Contact Variance | Contact Variance % | Forecasted AHT | Actual AHT | AHT Variance | AHT Variance % | Actual Not Handled | Agents Required | Agents In Queue | Agent Variance | Agent Variance % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 11 Oct 12:00 am | 3.00 | 4.00 | 1.00 | 33.33 | 198.00 | 201.00 | 3.00 | 1.52 | 0.00 | 2.70 | 1.00 | -1.70 | -62.99 |
| 11 Oct 12:15 am | 2.00 | 2.00 | 0.00 | 0.00 | 208.00 | 208.00 | 0.00 | 0.00 | 0.00 | 1.87 | 2.00 | 0.13 | 6.72 |
| 11 Oct 12:30 am | 4.00 | 4.00 | 0.00 | 0.00 | 173.00 | 173.00 | 0.00 | 0.00 | 1.00 | 2.94 | 2.00 | -0.94 | -32.02 |
| 11 Oct 12:45 am | 2.00 | 2.00 | 0.00 | 0.00 | 224.00 | 224.00 | 0.00 | 0.00 | 0.00 | 1.99 | 2.00 | 0.01 | 0.70 |
| 11 Oct 01:00 am | 2.00 | 3.00 | 1.00 | 50.00 | 237.00 | 547.00 | 310.00 | 130.80 | 0.00 | 2.01 | 2.00 | -0.01 | -0.60 |
| 11 Oct 01:15 am | 2.00 | 2.00 | 0.00 | 0.00 | 260.00 | 260.00 | 0.00 | 0.00 | 0.00 | 2.01 | 1.00 | -1.01 | -50.30 |
| 11 Oct 01:30 am | 3.00 | 3.00 | 0.00 | 0.00 | 251.00 | 251.00 | 0.00 | 0.00 | 0.00 | 2.92 | 1.93 | -0.99 | -33.83 |

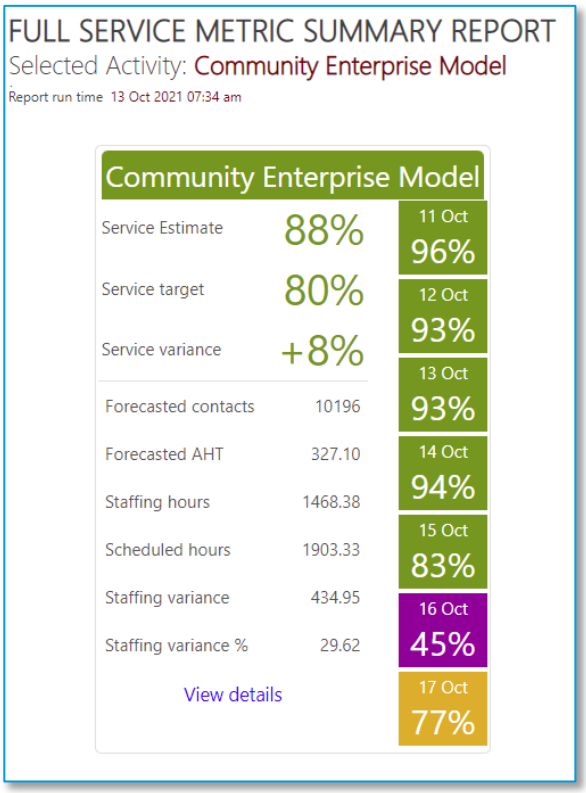
## Daily

Review the published schedule > schedule details to see all of your agent's schedules. From here you can edit schedules, create automated schedule adjustment plans (ASAPs), and view staffing requirements by interval with projected service metric.




## Forecast

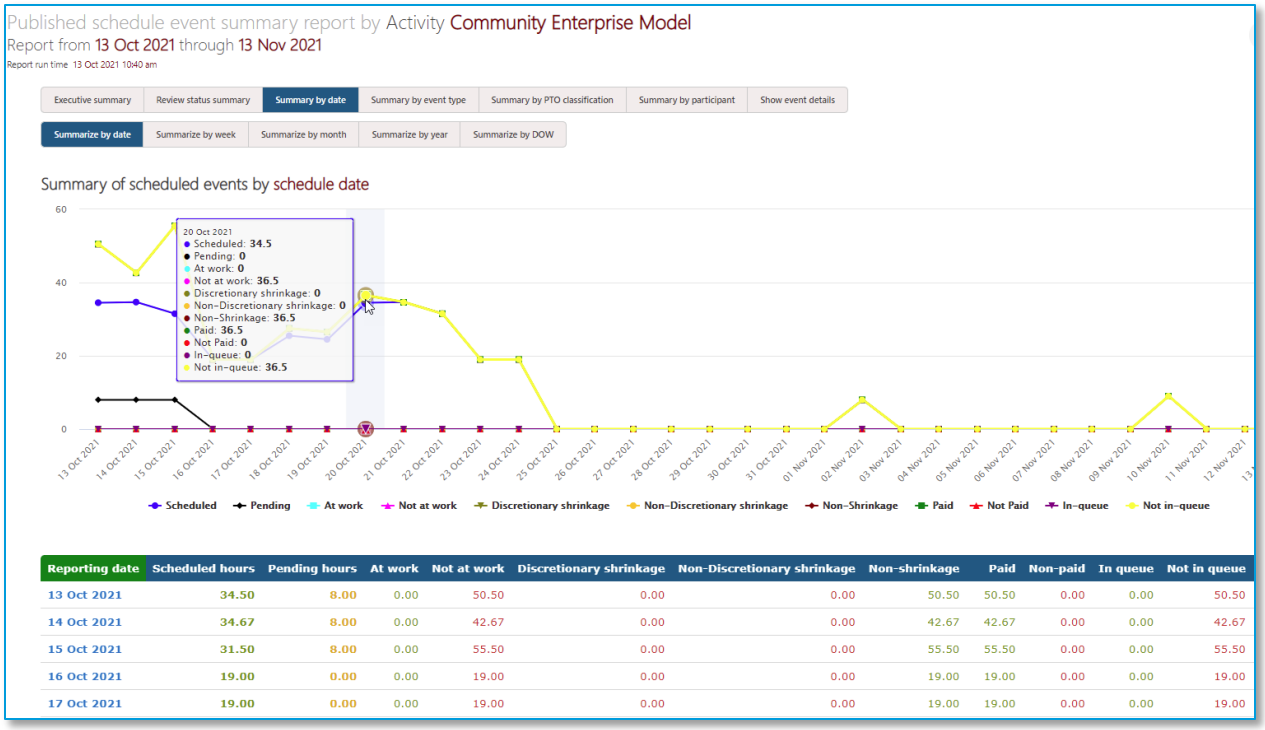
See an overview of the week with the Full Service Metric Summary Report.



# Time Off Reports

This report is the same as the published schedule event summary report but is restricted to events that occur off site, are not in queue, and require supervisor approval.

Includes executive summary down to the event details and can filter by event status, event type, PTO classification, participant, then filter further by date, week, month, year, day of week.



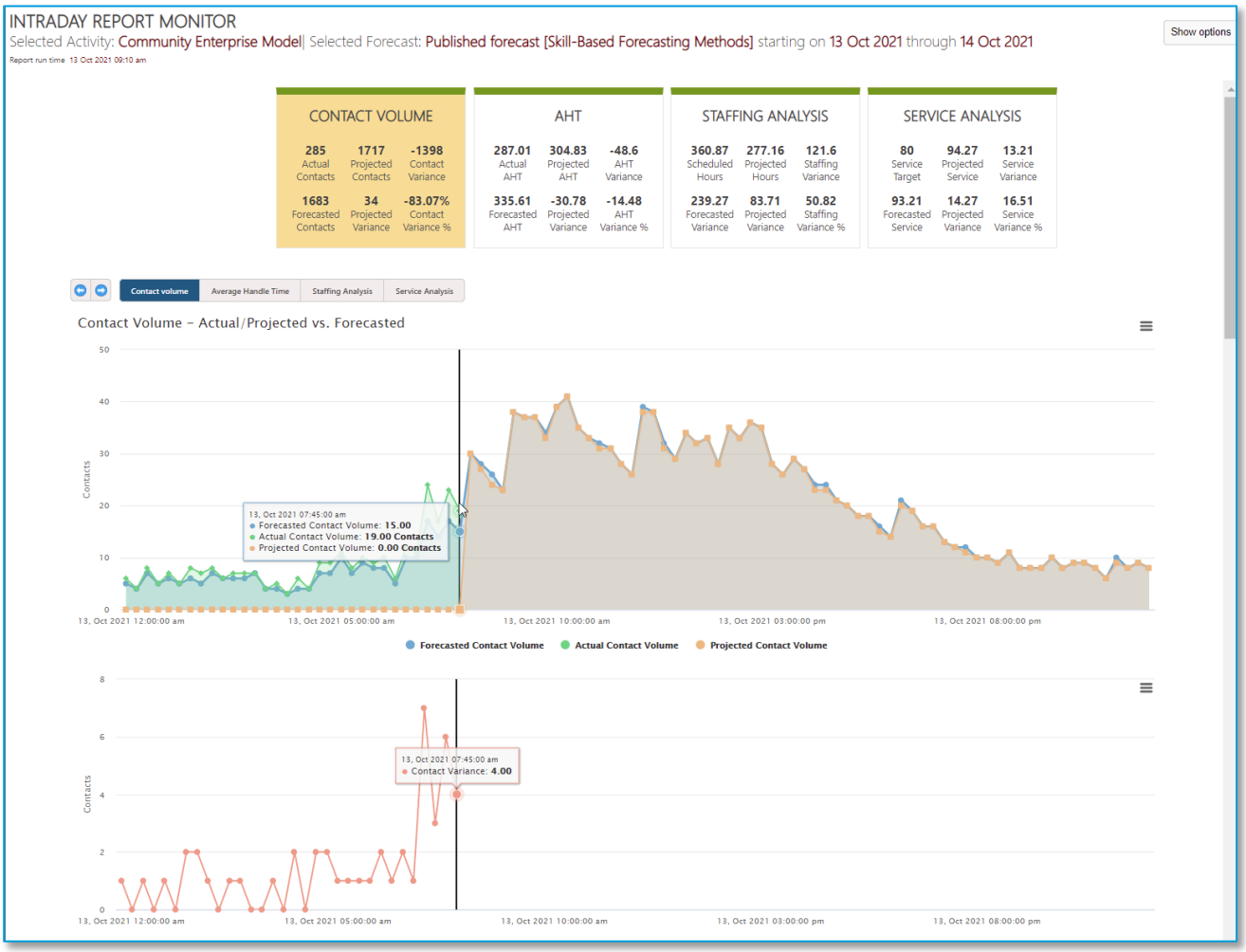

| Reporting date | Scheduled hours | Pending hours | At work | Not at work | Discretionary shrinkage | Non-Discretionary shrinkage | Non-shrinkage | Paid | Non-paid | In queue | Not in queue |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 13 Oct 2021 | 34.50 | 8.00 | 0.00 | 50.50 | 0.00 | 0.00 | 50.50 | 50.50 | 0.00 | 0.00 | 50.50 |
| 14 Oct 2021 | 34.67 | 8.00 | 0.00 | 42.67 | 0.00 | 0.00 | 42.67 | 42.67 | 0.00 | 0.00 | 42.67 |
| 15 Oct 2021 | 31.50 | 8.00 | 0.00 | 55.50 | 0.00 | 0.00 | 55.50 | 55.50 | 0.00 | 0.00 | 55.50 |
| 16 Oct 2021 | 19.00 | 0.00 | 0.00 | 19.00 | 0.00 | 0.00 | 19.00 | 19.00 | 0.00 | 0.00 | 19.00 |
| 17 Oct 2021 | 19.00 | 0.00 | 0.00 | 19.00 | 0.00 | 0.00 | 19.00 | 19.00 | 0.00 | 0.00 | 19.00 |

# Intraday Analysis

These reports include the intraday performance monitor and schedule analytics. They will let you know how your day is going, if your forecast is accurate, and whether you have the appropriate number of staff for the day.

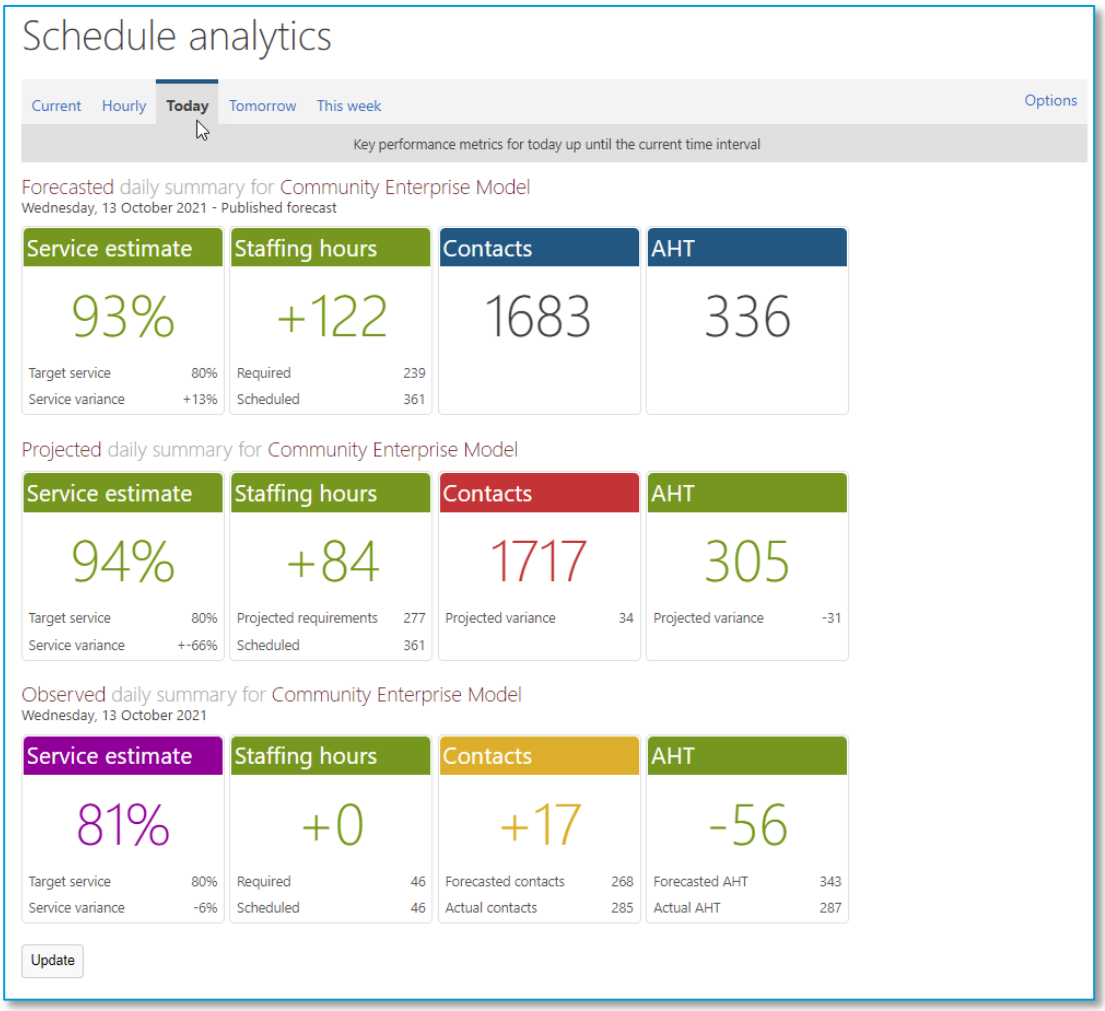
## Intraday performance monitor

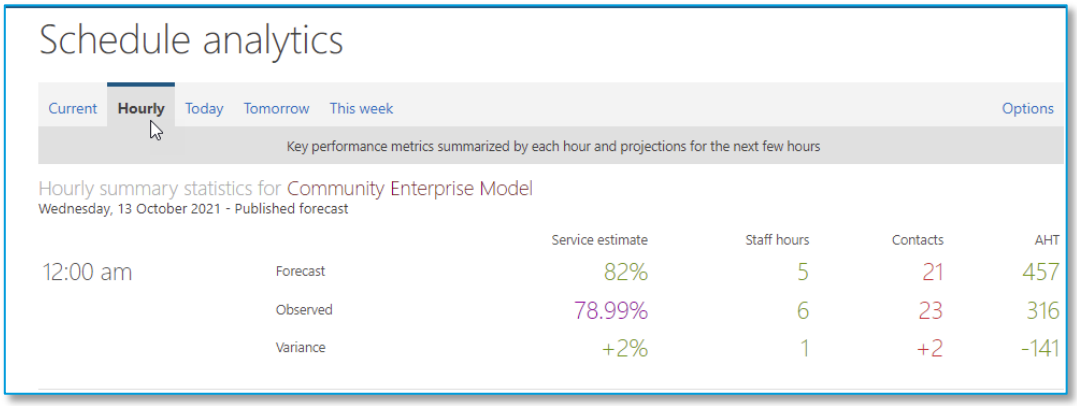
Show today's past performance and projections for the remainder of the day. It allows you to see the forecasted, actual and projected staffing requirements. The report includes contact volume, AHT, Staffing Analysis, and service analysis.



## Schedule analytics

Review key performance metrics from the published schedule including service estimate and staffing by current time, hourly, today, tomorrow, or this week.



# Adherence

Monitor your agents' adherence to their schedules. View daily, weekly, monthly, annual adherence. Agents also have their own adherence report.

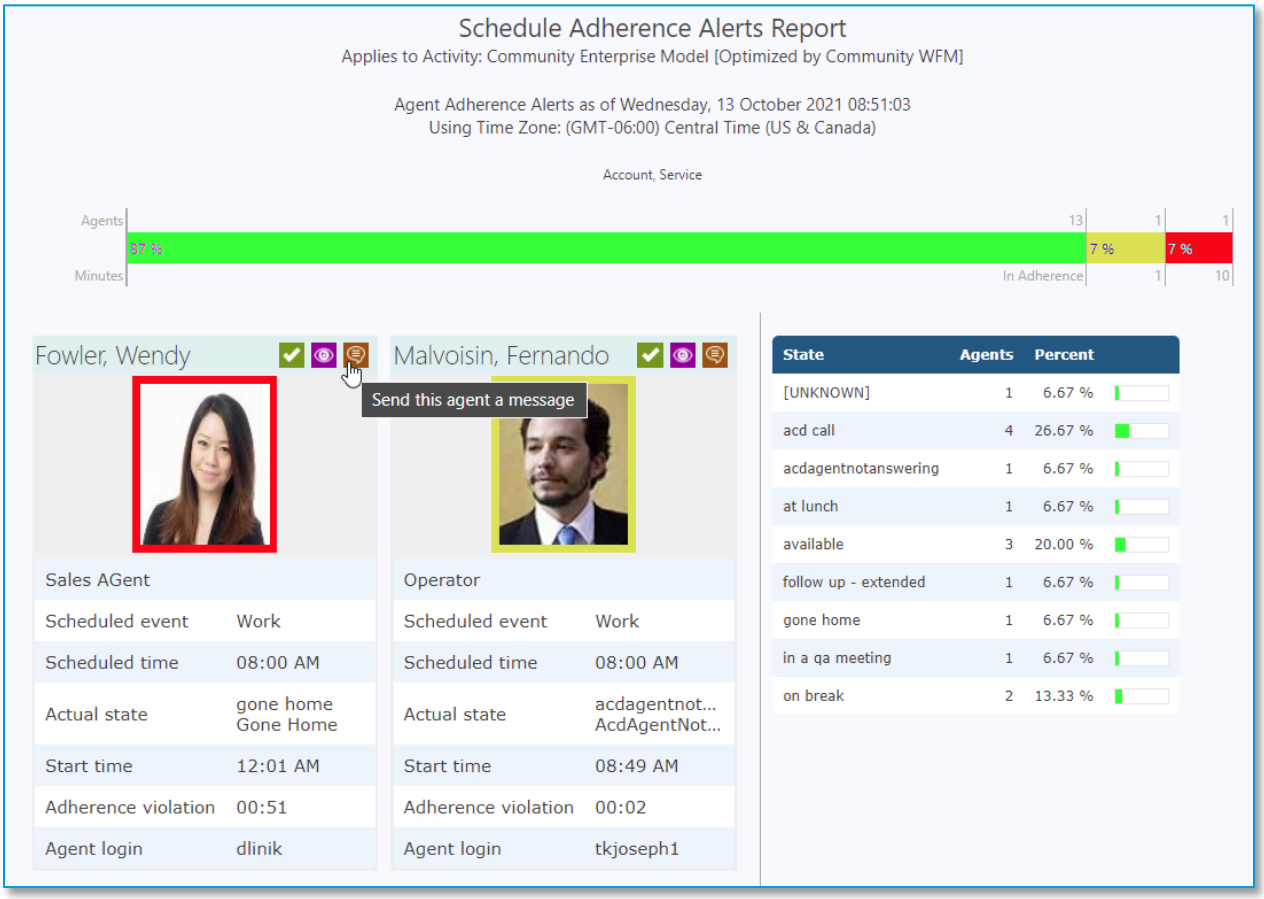
## Daily Schedule Adherence

This is a report to run first thing in the morning and leave it running during the day. It includes everything from a published schedule, and you can quickly verify what agents are actually doing during a shift. Because this is a published schedule, you can make edits to the schedule within the report or create ASAPs. It also includes a graphical representation of the device state details as a third rail.

There are many options for this report, including whether to suppress or include people with schedules for the day, and even whether to send notifications to agents when changes are made to the schedule.

## Schedule Adherence Alerts

Quickly view agents who are out of adherence (and for how long), and their current device state. You can even send the agent a message from within the report.



# Schedule Adherence History

A historical view of agents' adherence to their schedules. Shows details by day, or subtotals by week, month, or any other date range.

Historical Schedule Adherence Report
Applies to Activity: Site 1 - Dallas, TX []

From: Sunday, 26 September 2021 Through: Sunday, 03 October 2021
Using Time Zone: (GMT-06:00) Central Time (US & Canada)

Wednesday, 13 Oct 2021 08:54:25 AM Account, Service

Executive Summary

| Transaction Count | Scheduled In Queue | Actual In Queue | In Queue Variance | In Queue Variance % | Scheduled Out Of Queue | Actual Out Of Queue | Out Of Queue Variance | Out Queue Variance % | Total Scheduled | Total Variance | Total Adherence % | Non Scheduled / In Queue Hours |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 31.00 | 0.00 | 0.00 | 0.00 | 0.00 % | 1.00 | 0.27 | 0.73 | 27.00 % | 1.00 | 0.73 | 27.00 % | 2.82 |

Areheart, Sam

Azzarito, Deborah

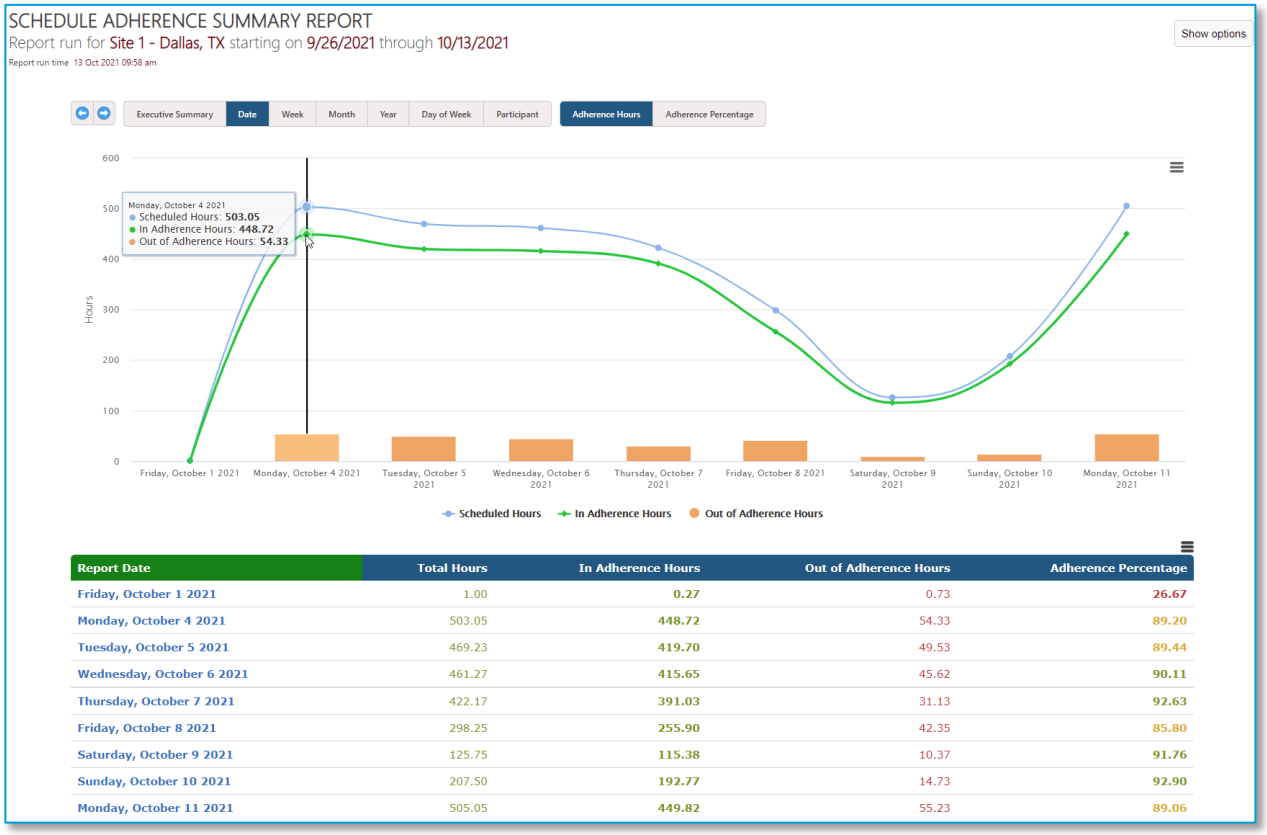
Badgett, Gregory

| Schedule Date | Transaction Count | Scheduled In Queue | Actual In Queue | In Queue Variance | In Queue Variance % | Scheduled Out Of Queue | Actual Out Of Queue | Out Of Queue Variance | Out Queue Variance % | Total Scheduled | Total Variance | Total Adherence % | Non Scheduled / In Queue Hours |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Friday, 01 October 2021 | 31 | 0.00 | 0.00 | 0.00 | 0.00 % | 1.00 | 0.27 | 0.73 | 27.00 % | 1.00 | 0.73 | 27.00 % | 2.82 |
| Subtotal: | 31.00 | 0.00 | 0.00 | 0.00 | 0.00 % | 1.00 | 0.27 | 0.73 | 27.00 % | 1.00 | 0.73 | 27.00 % | 2.82 |

Barton, Jean

# Schedule Adherence Summary

Another way of viewing schedule adherence history. This summary data has filters for executive summary and a variety of date ranges. View by individual agent or even by day of week to see patterns.




| Report Date | Total Hours | In Adherence Hours | Out of Adherence Hours | Adherence Percentage |
|---|---|---|---|---|
| Friday, October 1 2021 | 1.00 | 0.27 | 0.73 | 26.67 |
| Monday, October 4 2021 | 503.05 | 448.72 | 54.33 | 89.20 |
| Tuesday, October 5 2021 | 469.23 | 419.70 | 49.53 | 89.44 |
| Wednesday, October 6 2021 | 461.27 | 415.65 | 45.62 | 90.11 |
| Thursday, October 7 2021 | 422.17 | 391.03 | 31.13 | 92.63 |
| Friday, October 8 2021 | 298.25 | 255.90 | 42.35 | 85.80 |
| Saturday, October 9 2021 | 125.75 | 115.38 | 10.37 | 91.76 |
| Sunday, October 10 2021 | 207.50 | 192.77 | 14.73 | 92.90 |
| Monday, October 11 2021 | 505.05 | 449.82 | 55.23 | 89.06 |

# Device State Details

Shows all of the states an agent has been in on a given date.

Agent State Transaction Report
Applies to Activity: Site 1 - Dallas, TX []
Report Date: Sunday, 26 September 2021
Using Time Zone: (GMT-06:00) Central Time (US & Canada)
Wednesday, 13 Oct 2021 09:02:52 AM Account, Service

Areheart, Sam — 1234 [0]
No Transactions Found

Azzarito, Deborah — mabelend [0]
No Transactions Found

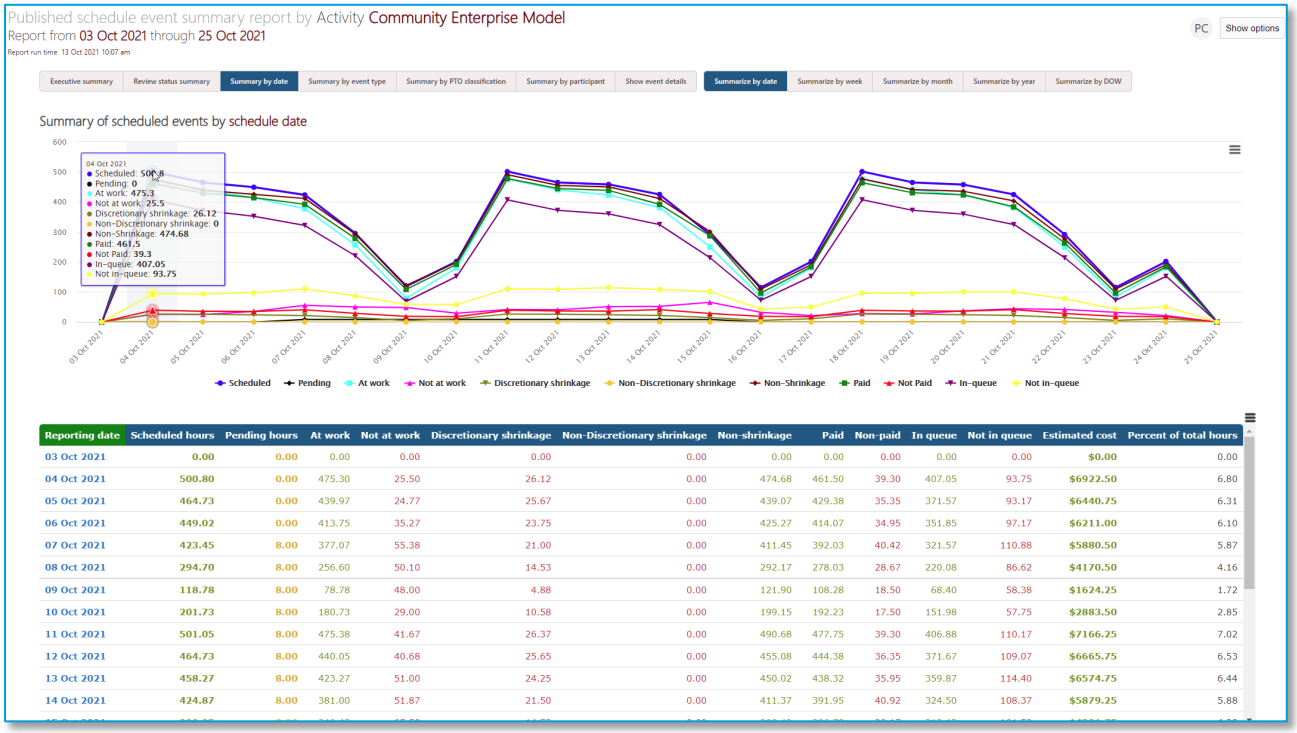
Badgett, Gregory — daden [48]

| State Name | Description | State ID | Transaction Start | Transaction End | Duration (Hours:Minutes:Seconds) | In Queue |
|---|---|---|---|---|---|---|
| gone home | Gone Home | 3 | 26 Sep 2021 02:59:27 PM | 26 Sep 2021 02:59:39 PM | 00:00:12 | False |
| available | Available | 2 | 26 Sep 2021 02:59:39 PM | 26 Sep 2021 03:09:45 PM | 00:10:06 | True |
| acd call | On ACD Call | 2 | 26 Sep 2021 03:09:45 PM | 26 Sep 2021 03:15:46 PM | 00:06:01 | True |
| follow up | Follow Up | 2 | 26 Sep 2021 03:15:46 PM | 26 Sep 2021 03:16:06 PM | 00:00:20 | True |
| available | Available | 2 | 26 Sep 2021 03:16:06 PM | 26 Sep 2021 03:35:07 PM | 00:19:01 | True |
| acd call | On ACD Call | 2 | 26 Sep 2021 03:35:07 PM | 26 Sep 2021 03:54:47 PM | 00:19:40 | True |
| follow up | Follow Up | 2 | 26 Sep 2021 03:54:47 PM | 26 Sep 2021 03:55:07 PM | 00:00:20 | True |
| available | Available | 2 | 26 Sep 2021 03:55:07 PM | 26 Sep 2021 04:21:06 PM | 00:25:59 | True |
| acd call | On ACD Call | 2 | 26 Sep 2021 04:21:06 PM | 26 Sep 2021 04:37:17 PM | 00:16:11 | True |
| follow up | Follow Up | 2 | 26 Sep 2021 04:37:17 PM | 26 Sep 2021 04:37:37 PM | 00:00:20 | True |
| available | Available | 2 | 26 Sep 2021 04:37:37 PM | 26 Sep 2021 05:15:09 PM | 00:37:32 | True |
| on break | On Break | 3 | 26 Sep 2021 05:15:09 PM | 26 Sep 2021 05:30:43 PM | 00:15:34 | False |
| available | Available | 2 | 26 Sep 2021 05:30:43 PM | 26 Sep 2021 06:05:51 PM | 00:35:08 | True |
| restroom | Restroom | 3 | 26 Sep 2021 06:05:51 PM | 26 Sep 2021 06:10:30 PM | 00:04:39 | False |
| available | Available | 2 | 26 Sep 2021 06:10:30 PM | 26 Sep 2021 06:17:08 PM | 00:06:38 | True |
| acd call | On ACD Call | 2 | 26 Sep 2021 06:17:08 PM | 26 Sep 2021 06:27:26 PM | 00:10:18 | True |
| follow up | Follow Up | 2 | 26 Sep 2021 06:27:26 PM | 26 Sep 2021 06:27:46 PM | 00:00:20 | True |
| available | Available | 2 | 26 Sep 2021 06:27:46 PM | 26 Sep 2021 07:00:08 PM | 00:32:22 | True |
| at lunch | At Lunch | 3 | 26 Sep 2021 07:00:08 PM | 26 Sep 2021 08:00:42 PM | 01:00:34 | False |
| available | Available | 2 | 26 Sep 2021 08:04:38 PM | 26 Sep 2021 08:10:03 PM | 00:05:25 | True |
| follow up - extended | Follow Up - Extended | 2 | 26 Sep 2021 08:10:03 PM | 26 Sep 2021 08:13:41 PM | 00:03:38 | True |
| available | Available | 2 | 26 Sep 2021 08:13:41 PM | 26 Sep 2021 08:44:33 PM | 00:30:52 | True |
| acd call | On ACD Call | 2 | 26 Sep 2021 08:44:33 PM | 26 Sep 2021 09:18:13 PM | 00:33:40 | True |
| follow up | Follow Up | 2 | 26 Sep 2021 09:18:13 PM | 26 Sep 2021 09:18:33 PM | 00:00:20 | True |

# Published Event: Summary or Detail

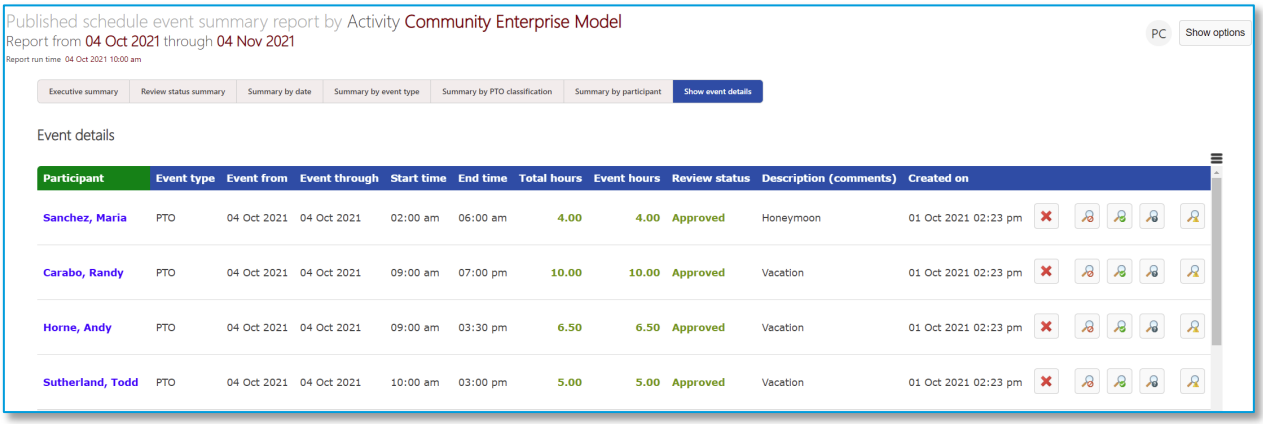
Report hours by event type and interval.

This report summarizes all of the events in a published schedule by total hours, paid status, at work status, in queue status, and shrinkage. Review by date, event type, PTO classification, participant, and event.




| Reporting date | Scheduled hours | Pending hours | At work | Not at work | Discretionary shrinkage | Non-Discretionary shrinkage | Non-shrinkage | Paid | Non-paid | In queue | Not in queue | Estimated cost | Percent of total hours |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 03 Oct 2021 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | $0.00 | 0.00 |
| 04 Oct 2021 | 500.80 | 0.00 | 475.30 | 25.50 | 26.12 | 0.00 | 474.68 | 461.50 | 39.30 | 407.05 | 93.75 | $6922.50 | 6.80 |
| 05 Oct 2021 | 464.73 | 0.00 | 439.97 | 24.77 | 25.67 | 0.00 | 439.07 | 429.38 | 35.35 | 371.57 | 93.17 | $6440.75 | 6.31 |
| 06 Oct 2021 | 449.02 | 0.00 | 413.75 | 35.27 | 23.75 | 0.00 | 425.27 | 414.07 | 34.95 | 351.85 | 97.17 | $6211.00 | 6.10 |
| 07 Oct 2021 | 423.45 | 8.00 | 377.07 | 55.38 | 21.00 | 0.00 | 411.45 | 392.03 | 40.42 | 321.57 | 110.88 | $5880.50 | 5.87 |
| 08 Oct 2021 | 294.70 | 8.00 | 256.60 | 50.10 | 14.53 | 0.00 | 292.17 | 278.03 | 28.67 | 220.08 | 86.62 | $4170.50 | 4.16 |
| 09 Oct 2021 | 118.78 | 8.00 | 78.78 | 48.00 | 4.88 | 0.00 | 121.90 | 108.28 | 18.50 | 68.40 | 58.38 | $1624.25 | 1.72 |
| 10 Oct 2021 | 201.73 | 8.00 | 180.73 | 29.00 | 10.58 | 0.00 | 199.15 | 192.23 | 17.50 | 151.98 | 57.75 | $2883.50 | 2.85 |
| 11 Oct 2021 | 501.05 | 8.00 | 475.38 | 41.67 | 26.37 | 0.00 | 490.68 | 477.75 | 39.30 | 406.88 | 110.17 | $7166.25 | 7.02 |
| 12 Oct 2021 | 464.73 | 8.00 | 440.05 | 40.68 | 25.65 | 0.00 | 455.08 | 444.38 | 36.35 | 371.67 | 109.07 | $6665.75 | 6.53 |
| 13 Oct 2021 | 458.27 | 8.00 | 423.27 | 51.00 | 24.25 | 0.00 | 450.02 | 438.32 | 35.95 | 359.87 | 114.40 | $6574.75 | 6.44 |
| 14 Oct 2021 | 424.87 | 8.00 | 381.00 | 51.87 | 21.50 | 0.00 | 411.37 | 391.95 | 40.92 | 324.50 | 108.37 | $5879.25 | 5.88 |

When sorted for details, this is where you can approve, deny, revalidate, or remove time off requests.



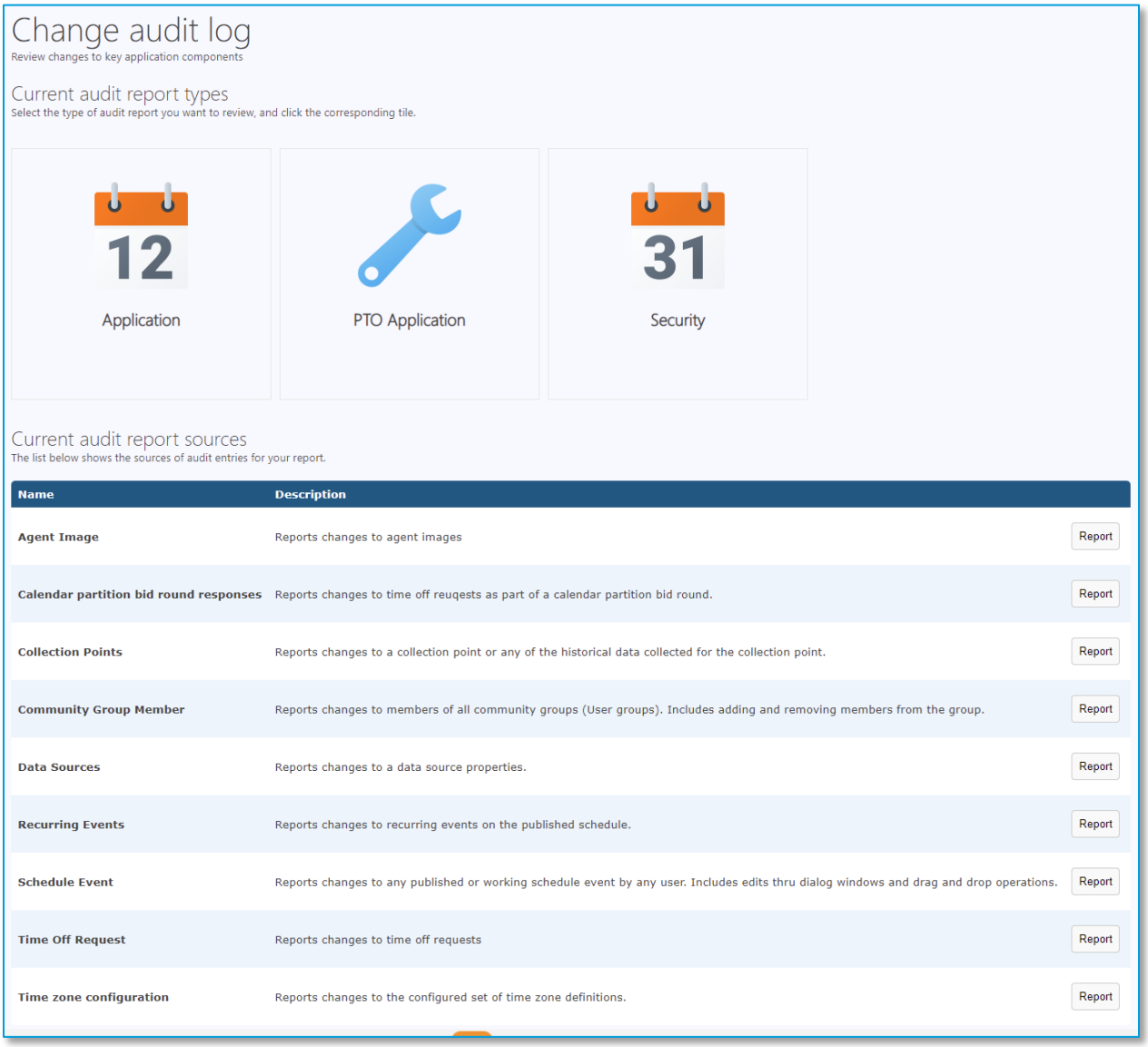

| Participant | Event type | Event from | Event through | Start time | End time | Total hours | Event hours | Review status | Description (comments) | Created on |
|---|---|---|---|---|---|---|---|---|---|---|
| Sanchez, Maria | PTO | 04 Oct 2021 | 04 Oct 2021 | 02:00 am | 06:00 am | 4.00 | 4.00 | Approved | Honeymoon | 01 Oct 2021 02:23 pm |
| Carabo, Randy | PTO | 04 Oct 2021 | 04 Oct 2021 | 09:00 am | 07:00 pm | 10.00 | 10.00 | Approved | Vacation | 01 Oct 2021 02:23 pm |
| Horne, Andy | PTO | 04 Oct 2021 | 04 Oct 2021 | 09:00 am | 03:30 pm | 6.50 | 6.50 | Approved | Vacation | 01 Oct 2021 02:23 pm |
| Sutherland, Todd | PTO | 04 Oct 2021 | 04 Oct 2021 | 10:00 am | 03:00 pm | 5.00 | 5.00 | Approved | Vacation | 01 Oct 2021 02:23 pm |

# Other Reports

## Administrative Reports

### Change Audit Log

View any changes made to the system, including the person who made the change.



## Event Review Status Change

A list of event changes, such as approved and denied events.

Event status change report
11 Oct 2021 through 17 Oct 2021 on Wednesday, 13 Oct 2021 10:31 AM

| Name | Review status | Reviewed by | Reviewed on | Event date | Event type | Description | Notes |
|---|---|---|---|---|---|---|---|
| Nelson, Candice | Approved | Account, Service | Monday, 11 Oct 2021 | Monday, 11 Oct 2021 12:00 PM | Late | Created by soft checkin monitor | Created by soft checkin monitor |
| Goldfarb, Brett | Approved | Account, Service | Monday, 11 Oct 2021 | Monday, 11 Oct 2021 06:00 PM | Late | Created by soft checkin monitor | Created by soft checkin monitor |
| Badgett, Gregory | Denied | Account, Service | Tuesday, 12 Oct 2021 | Friday, 15 Oct 2021 12:00 AM | PTO | birthday! | Y |
| Badgett, Gregory | Denied | Account, Service | Tuesday, 12 Oct 2021 | Friday, 15 Oct 2021 12:00 AM | PTO | birthday! | Y |

## Agent Data Source Login

Quickly view agents without data source logins, those without a default data source, and the default source for all agents.

Agents with no data source logins

| Agent Id | Agent Name | Employee Id | Hire Date | Title |
|---|---|---|---|---|
| 539 | Duncan, Kaenenball | | 06 October 2021 | |
| 538 | Smith, Karina | | 26 August 2020 | |

Agents with no *Default* Data Source Login

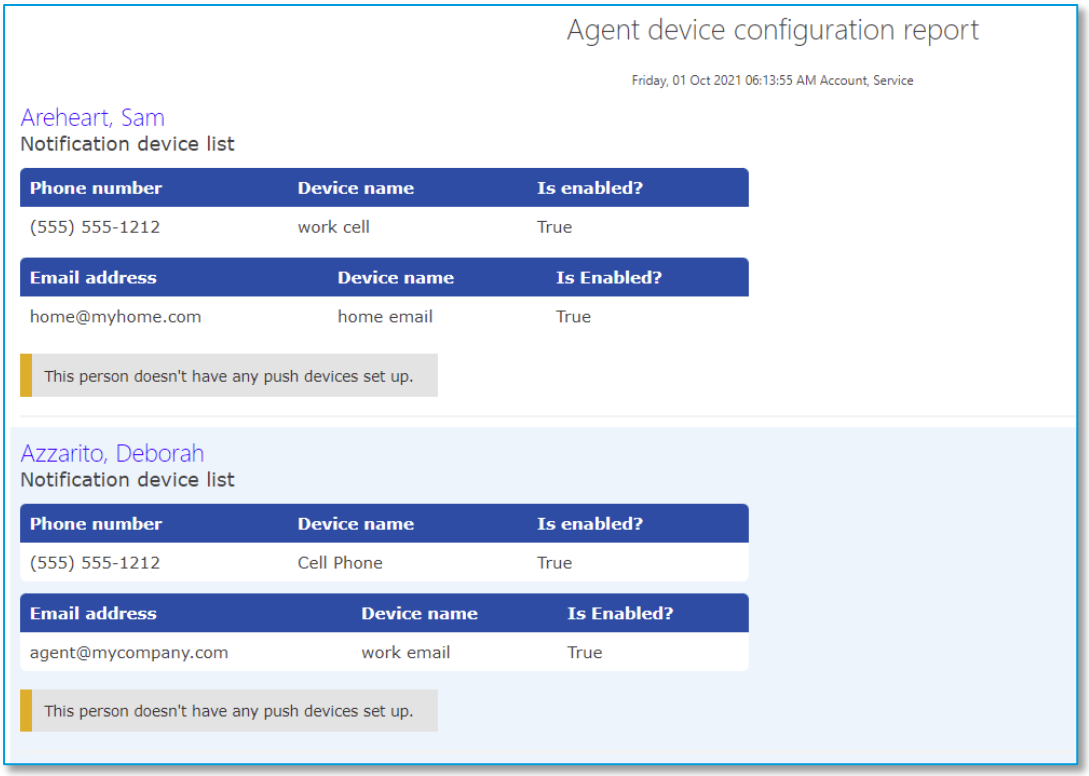
Default agent login report

| Agent Id | Agent Name | Employee Id | Hire Date | Title | Default Data Source Type | Default Data Source Name | Login Id |
|---|---|---|---|---|---|---|---|
| 278 | Areheart, Sam | SCA21218 | 11 July 2016 | Sales/Service Rep | Avaya ACD | CMS Enterprise ACD | 1234 |
| 156 | Azzarito, Deborah | dka21094 | 21 September 2015 | Sales/Service Rep | I3 | Enghouse | mabelend |
| 453 | Badgett, Gregory | GAB21254 | 12 June 2017 | Sales/Service Rep | I3 | Enghouse | daden |
| 451 | Barton, Jean | JBarton | 12 June 2017 | Sales/Service Rep | I3 | Enghouse | ladhikari |
| 479 | Bickley, Sharon | SBickley | 10 July 2017 | Sales/Service Rep | I3 | Enghouse | mrawahneh |
| 411 | Bixler, Lyon | lbixler | 15 May 2017 | Sales/Service Rep | I3 | Enghouse | malmanza |
| 27 | Blakely, Latrice | LNB21249 | 01 December 2014 | Sales/Service Rep | I3 | Enghouse | raoshana |
| 467 | Brown, Chanell | cab17889 | 12 June 2017 | Sales/Service Rep | I3 | Enghouse | jarevalorivers |
| 263 | Brunson, David | dbrunson | 23 June 2016 | Sales/Service Rep | I3 | Enghouse | katkins |
| 402 | Burns, Barbara | BBurns | 10 April 2017 | Sales/Service Rep | I3 | Enghouse | fbarrezueta |
| 391 | Carabo, Randy | rcarabo | 13 March 2017 | Sales/Service Rep | I3 | Enghouse | kbazaldua |

## Device setup report

Settings > People & agent templates > Device setup report

A simple listing of each person and their notifications — SMS devices, external email addresses, and push devices.



Agent device configuration report

Friday, 01 Oct 2021 06:13:55 AM Account, Service

Areheart, Sam
Notification device list

| Phone number | Device name | Is enabled? |
|---|---|---|
| (555) 555-1212 | work cell | True |

| Email address | Device name | Is Enabled? |
|---|---|---|
| home@myhome.com | home email | True |

This person doesn't have any push devices set up.

Azzarito, Deborah
Notification device list

| Phone number | Device name | Is enabled? |
|---|---|---|
| (555) 555-1212 | Cell Phone | True |

| Email address | Device name | Is Enabled? |
|---|---|---|
| agent@mycompany.com | work email | True |

This person doesn't have any push devices set up.