CommunityWFM

Overview of CommunityWFM 5.1

Webinar handout
Version: January 18, 2024

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About this Document

This document accompanies the CommunityWFM College webinar *Overview of CommunityWFM 5.1*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

Overview

CommunityWFM Enterprise 5.1 represents a significant release for CommunityWFM and includes adding support for multiple languages (Spanish for Mexico, Canadian French, and Portuguese for Brazil); additions to aid in compliance with General Data Protection Regulations (GDPR); an Agent Self-Service Kiosk (ASSK); enhanced audit trail reporting; a new adherence comparison report; plus, the usual assortment of bug fixes and interface enhancements.

Note: Community WFM Essentials edition includes many of the new features such as data subject rights, translations, and the adherence comparison report, but does not include ASSK, themes, or advanced PTO related enhancements.

New Features

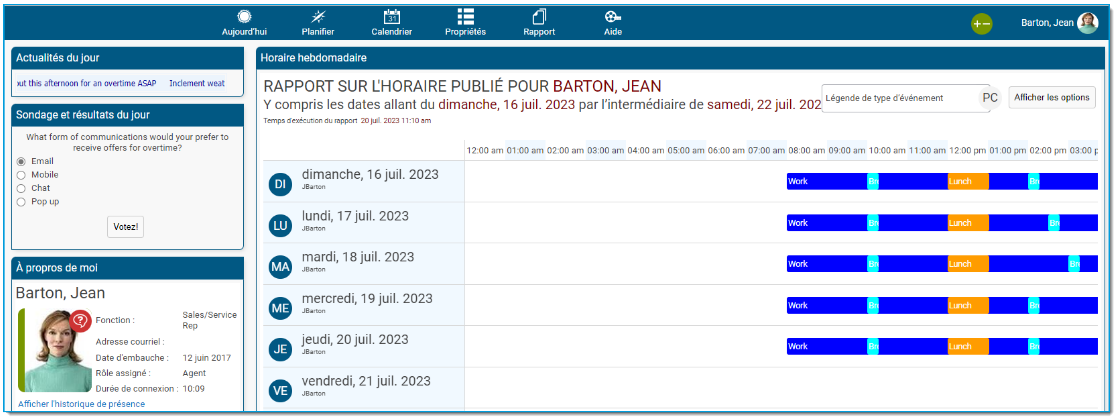
Multi-language support

See Appendix 1 for more details.

¡Hola! Bienvenido a su comunidad.
Bonjour ! Bienvenue dans votre communauté.
Olá! Bem-vindo à sua comunidade

With 5.1 there is an option for multi-language support, which allows viewing the screens in CommunityWFM in French Canadian, Portuguese, or Mexican Spanish. Change the region / language to see reports, pop-up instructions, buttons, and menu items in the preferred language in the web version and the mobile app.

In places where there is client-entered text, it will not be translated (e.g., Hot News, Survey & Results).



Configuring the language setting

An administrator must make the change for the language preference.

Administrators may configure the language for **all** users in the Global settings & preferences (this will change the language of the login page), or for **individual** users in the user's profile. There is also an option to sync the language for multiple users using the Agent Synchronization Wizard.

After changing the language settings, users must log out and log back in for pages to convert to the new selected language.

Agent Self-Service Kiosk (ASSK)

Have a mandatory online training module that agents can complete when they're ready? But only if there's enough staff? ASSK is the answer.

With Community's new ASSK feature, agents can request specifically configured out of queue events and have the event automatically approved and placed on their schedule if it passes the validation rules such as adequate staffing levels. No need for an administrator to approve the request!

Depending on the event configuration, agents may request the designated ASSK event and add it to their schedule in real time, or the configuration can require that the event pass business rules before approval.

	Is Member?	Is Configured?
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 exists.	✓	⊘
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 Ensure that a user requesting a self-service event is not making a request outside the allowable date interval.	✓	✓
Agent Restricted Action Plan Rule Ensure that a user requesting an self-service event is not currently part of a restricted action plan that does not allow self-service events.	✓	✓
Schedule Performance Rule Establish thresholds based on staffing surplus or shortage, and allow self-service requests based on the impact to the schedule performance.	✓	✓
Event Duration Rule Ensure that the submitted duration for an ASSK event does not exceed the maximum allowable duration.	✓	✓

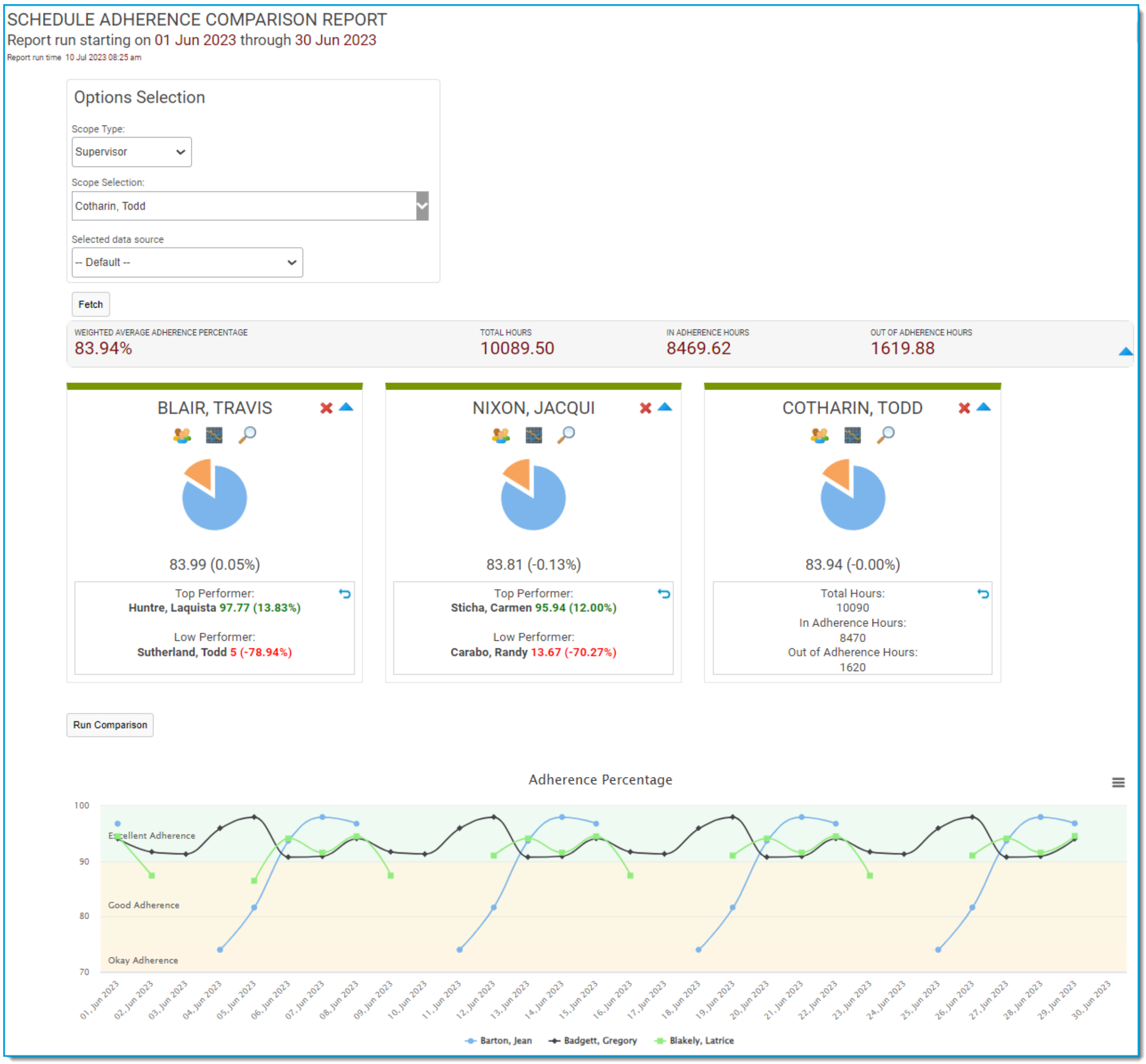
Administrators determine the eligibility of events and configure any applicable business rules, including a Schedule Performance Rule (allowable staffing variance), which run when the agent makes the request.

A memo is sent to the supervisor tree and the agent upon request approval.

Adherence Comparison Report

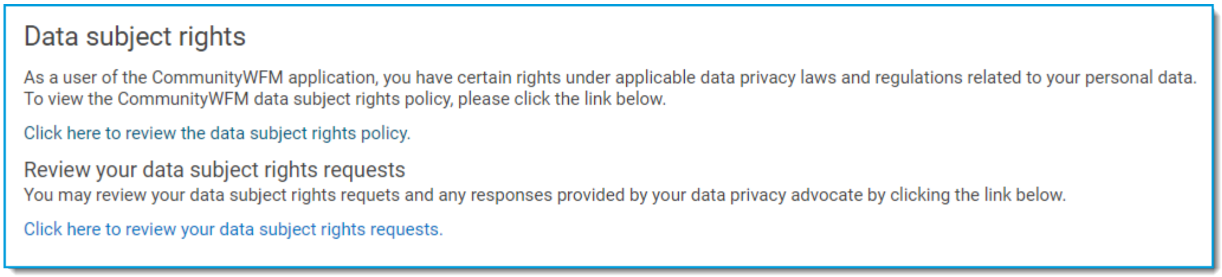
See Appendix 2 for more details.

Using summary adherence data, the comparison report allows selecting up to five people or groups (“scopes”) to compare schedule adherence for an unlimited date range. From an executive summary to details, see the top and low performers for each group, total adherence hours and percentages, trends, and the performance of individual agents. As with most reports, this one includes the ability to export the data for further review.

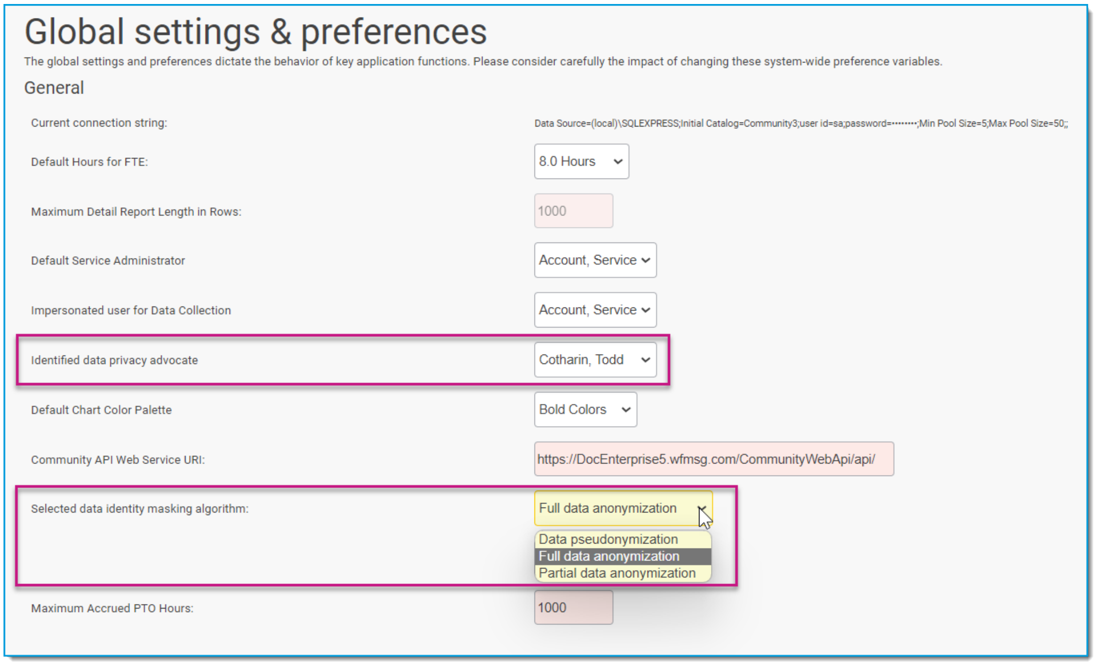


GDPR Support

General Data Protection Regulations (GDPR) are statutes governing the use and distribution of personal data for users of a website or application. CommunityWFM 5.1 includes a data subject rights policy page with links to allow viewing collected personally identifiable information (PII) and requesting removal, restriction, or correction of PII. Agents may also view a list of their previous data subject rights requests.



Contact centers will need to designate an administrator in the *Global settings & preferences* as a data privacy advocate who can fulfill the data subject access/use requests. There is also an option to select the default data identity masking algorithm:

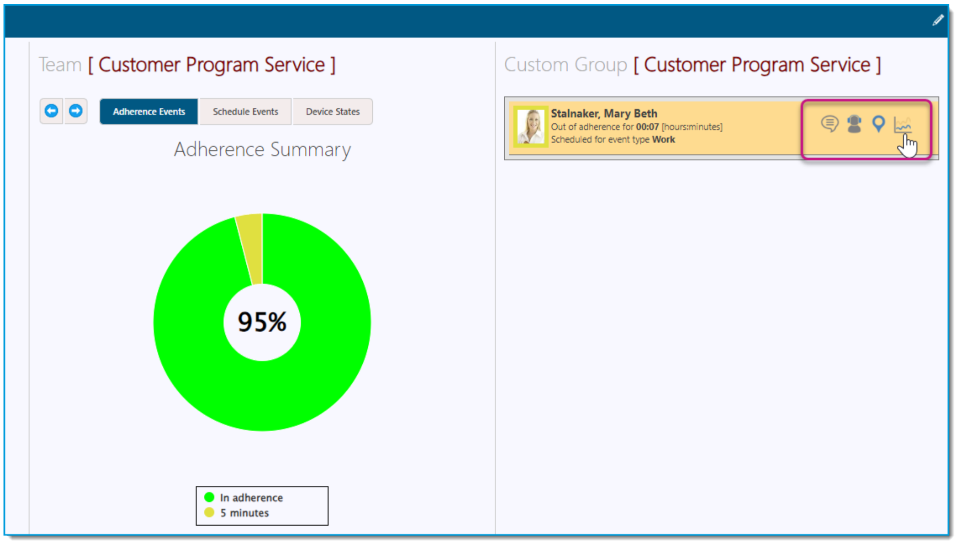


Note: if you elect to mask a user's data, the masking is not reversible or recoverable and with full anonymization the user profile is locked. Once masked, no one, not even the support desk, can retrieve the PII data.

User interface enhancements

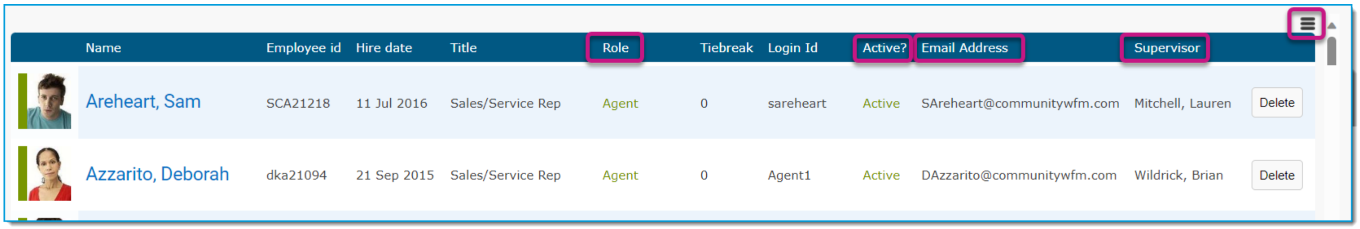
Schedule adherence monitor

In the Schedule Adherence Monitor when viewing the data as a list, there are links to not only send a message, view the agent's profile or check-in status, but now you can quickly launch the agent's Schedule Adherence Summary Report.



People list

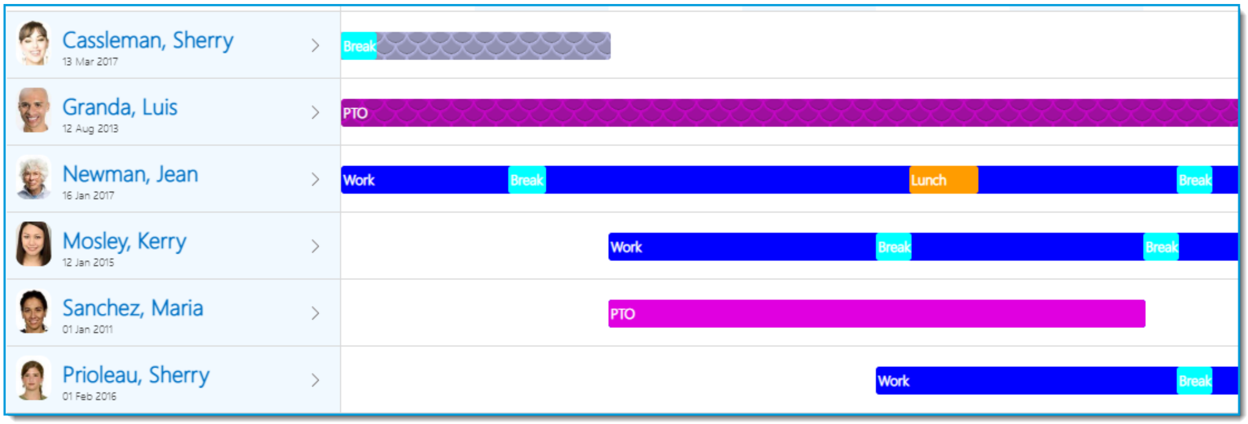
The people list (Settings > People & agent templates > People > Current list) has new columns for user role, email address, login ID, active/inactive status, and supervisor name. There is also a new export option.



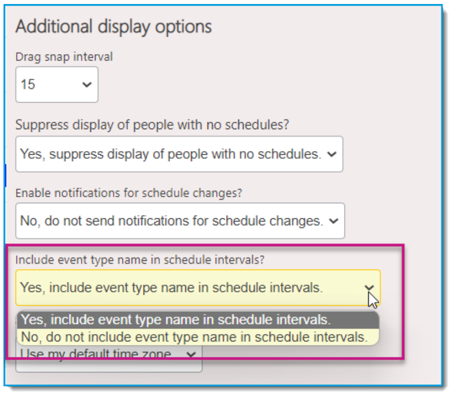
Schedules and Events

Event type name

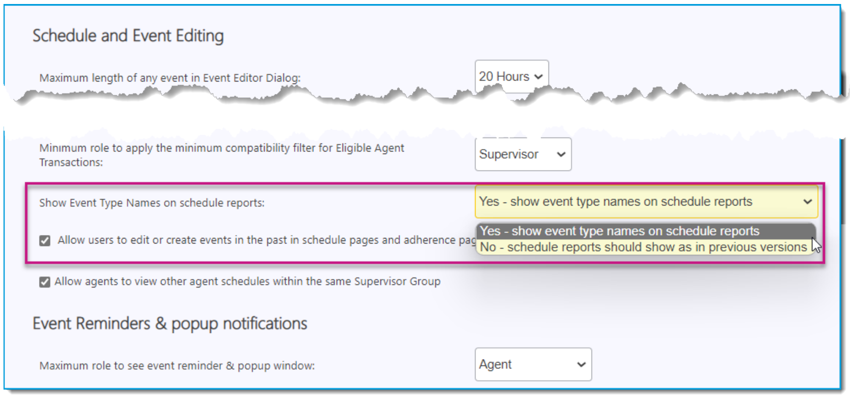
Schedules now include labels describing the event type. No need to search the Event type legend drop-down menu to find out what event is represented by the color.



You can turn off this feature for a single report in the report options panel.



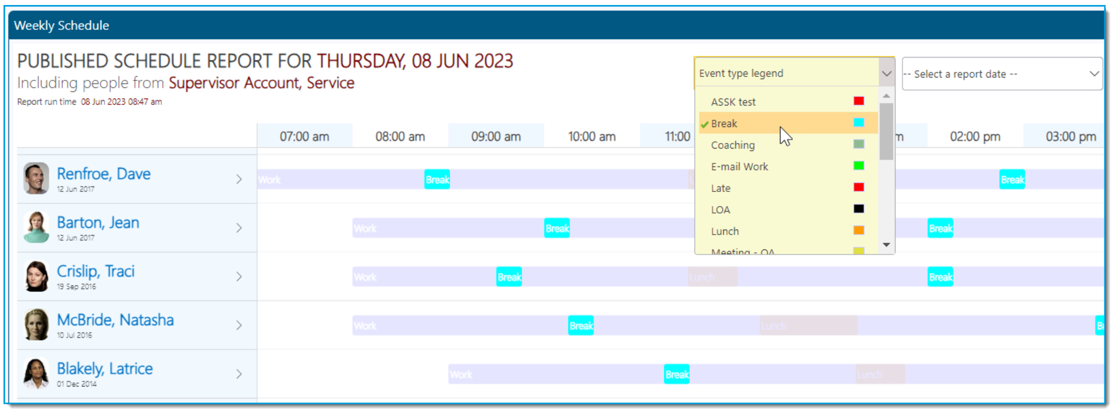
Or turn it off for all reports in the Global settings & preferences – Schedule and Event Editing section.



Spotlight view

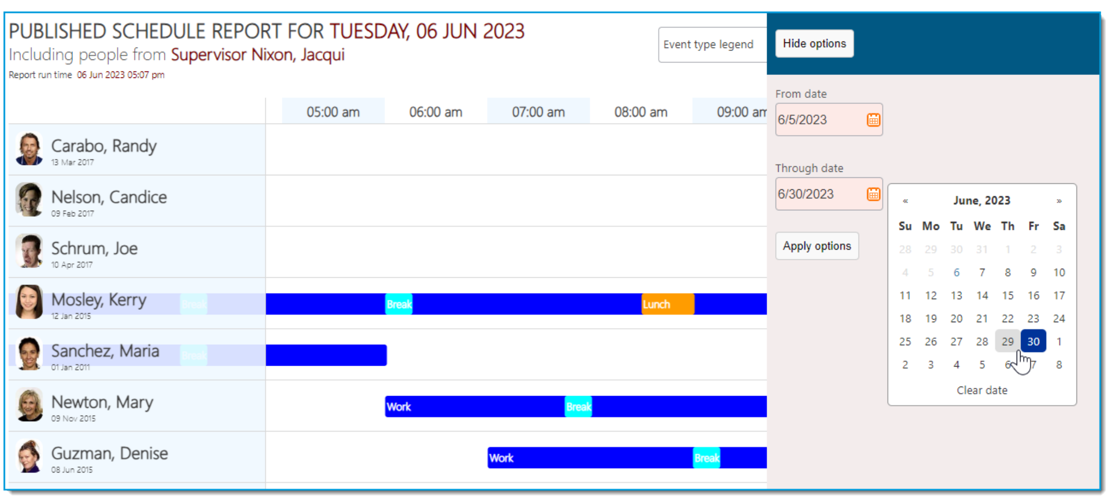
Use a filter to highlight one or more event types on a published schedule. From the Event type legend drop-down menu, click an event name to highlight that event. Click another name to add it to the highlighted events. Click again to deselect the event.

You can still manage the non-highlighted items on the schedule as before (click and drag, right-click edit, etc.).



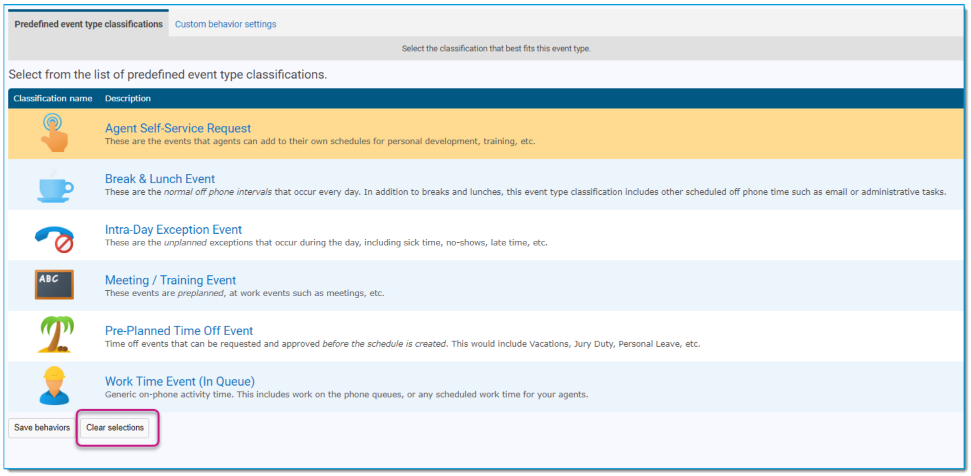
Agent view

When agents are allowed to view the published schedules for their supervisor group, there is now an options panel to select a date range to view future weeks. This is handy when planning vacations or schedule swaps.



Event behavior validation

There is a new *Clear selections* button at the bottom of the Event Type Behaviors - Predefined event type classifications, and the Custom behavior settings tab. This button will clear all selections and allow selecting your own parameters.



There is also a new category for the Agent Self-Service Kiosk, and two new questions validate ASSK events.

Reports

Date format

The date format throughout the application is now dd/mon/yyyy (01 Jan 2024) to avoid the possibility of confusion when using numbers for both day and month.

Link to more information

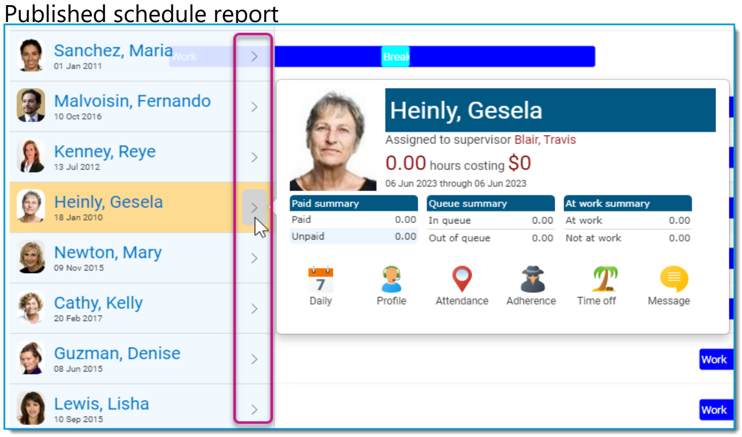
In several reports, there are visual indicators > for links to display more information.

Basically, if you see a > symbol, click on it. Something good will happen!

- When an agent runs their **Daily schedule adherence report** view, the link will display their state transactions report.

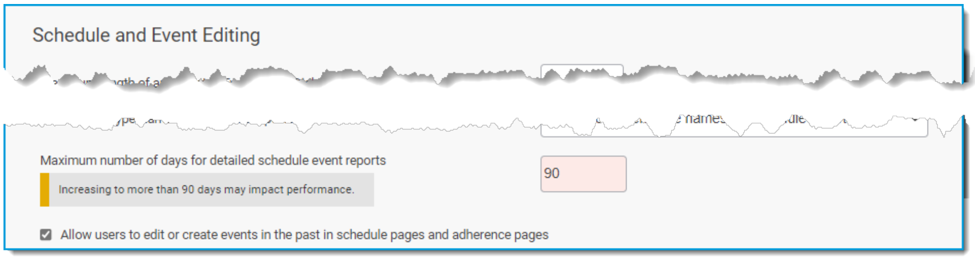
- From the **Published schedule report**, the link will open the agent card. This link was there before, but not visible.

Published schedule report



- In the **Published event summary report,** the link will take you to the Published schedule **detail** report – no need to go back to the main page. The Published schedule report will open in a new window and the date drop-down will include **all** the days from the summary report.

- You can now pick a single day in the published schedule events report options.
- There is a new option in *Global settings & preferences* to set the maximum number of days for **detailed** schedule events reports. The default value is 90; maximum is 365. **Note:** increasing to more than 90 days may slow performance.

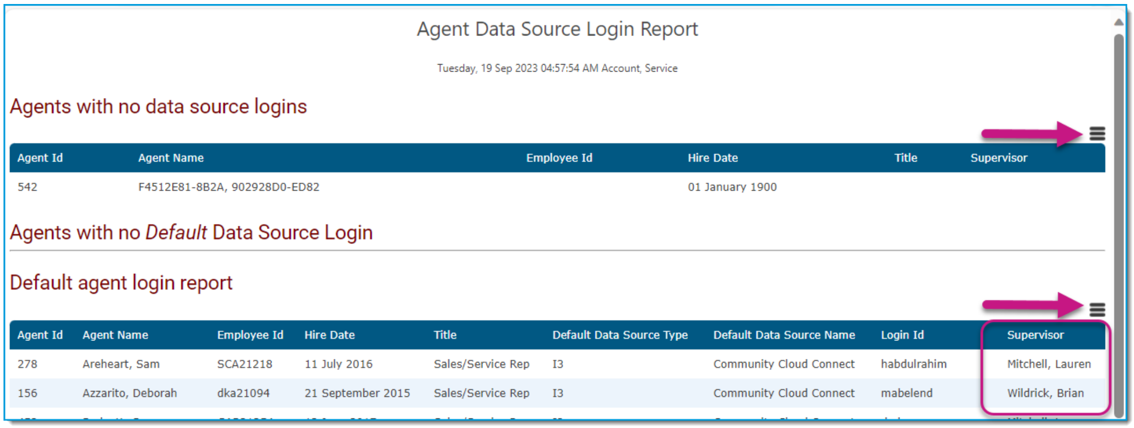


Suppress net-line statistics

In reports that include net-line statistics, there is now an option to temporarily disable real-time net-line statistics updates. Find this option in a drop-down menu in the options panel. This will allow making multiple changes without having to wait for the inline statistics to update between edits. The PC button will indicate the number of edits, and refreshing the page or clicking the PC button will update the net-line statistics.

Data Source

The Agent Data Source Login Report (Settings > People & agent templates > Data source logins) now includes an export option and a new column with supervisor name.



Agent Data Source Login Report

Tuesday, 19 Sep 2023 04:57:54 AM Account, Service

Agents with no data source logins

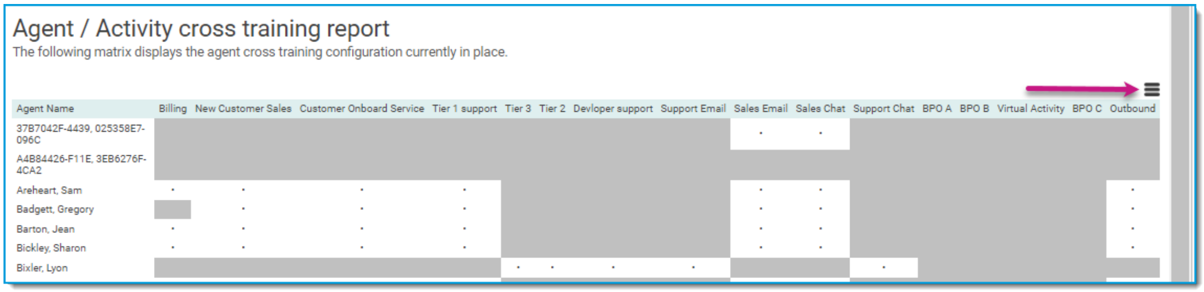
Agent Id	Agent Name	Employee Id	Hire Date	Title	Supervisor
542	F4512E81-8B2A, 902928D0-ED82		01 January 1900		

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	Supervisor
278	Areheart, Sam	SCA21218	11 July 2016	Sales/Service Rep	I3	Community Cloud Connect	habdulrahim	Mitchell, Lauren
156	Azzarito, Deborah	dka21094	21 September 2015	Sales/Service Rep	I3	Community Cloud Connect	mabelend	Wildrick, Brian

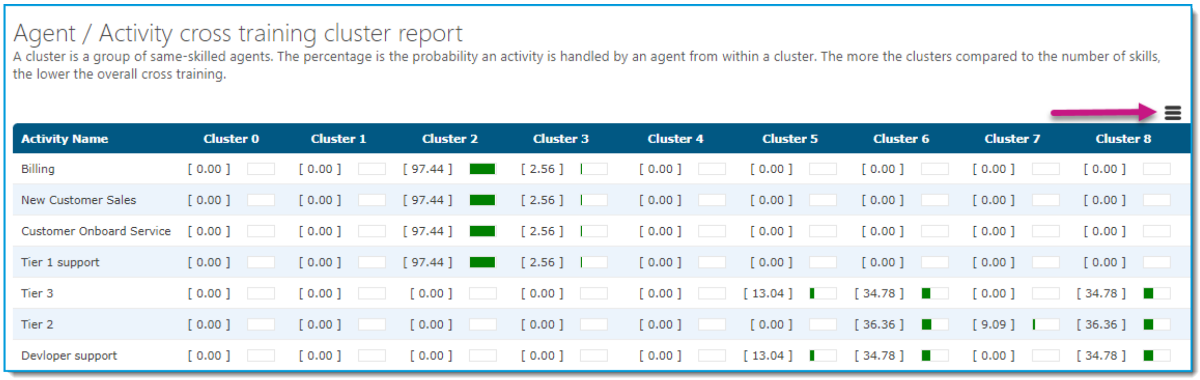
Forecasts > Working forecasts: Added an **export** option for the Agent / Activity cross-training and cluster reports.



Agent / Activity cross training report

The following matrix displays the agent cross training configuration currently in place.

Agent Name	Billing	New Customer Sales	Customer Onboard Service	Tier 1 support	Tier 3	Tier 2	Devloper support	Support Email	Sales Email	Sales Chat	Support Chat	BPO A	BPO B	Virtual Activity	BPO C	Outbound
37B7042F-4439, 025358E7-096C									·	·						
A4B84426-F11E, 3EB6276F-4CA2																
Areheart, Sam	·	·	·	·					·	·						·
Badgett, Gregory		·	·	·					·	·						·
Barton, Jean	·	·	·	·					·	·						·
Bickley, Sharon	·	·	·	·					·	·						·
Bixler, Lyon					·	·	·	·			·					



Agent / Activity cross training cluster report

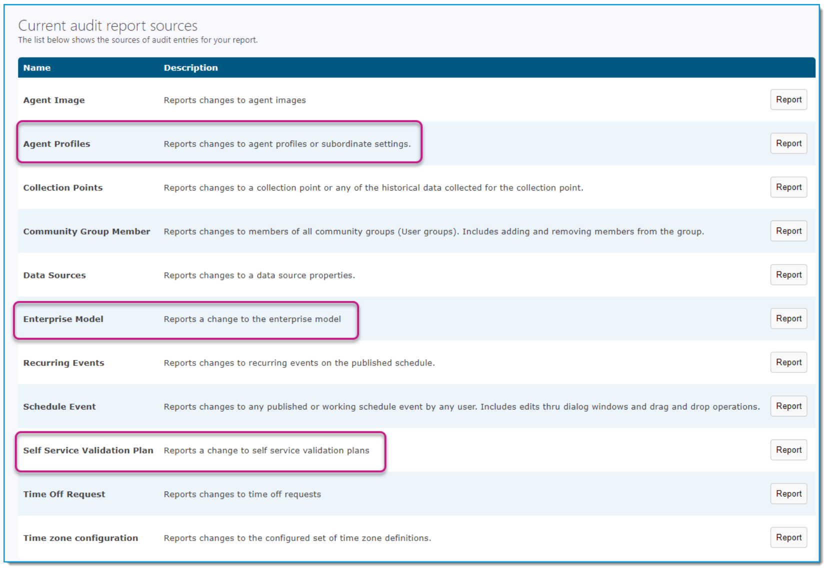
A cluster is a group of same-skilled agents. The percentage is the probability an activity is handled by an agent from within a cluster. The more the clusters compared to the number of skills, the lower the overall cross training.

Activity Name	Cluster 0	Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5	Cluster 6	Cluster 7	Cluster 8
Billing	[0.00]	[0.00]	[97.44]	[2.56]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]
New Customer Sales	[0.00]	[0.00]	[97.44]	[2.56]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]
Customer Onboard Service	[0.00]	[0.00]	[97.44]	[2.56]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]
Tier 1 support	[0.00]	[0.00]	[97.44]	[2.56]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]
Tier 3	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]	[13.04]	[34.78]	[0.00]	[34.78]
Tier 2	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]	[36.36]	[9.09]	[36.36]
Devloper support	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]	[13.04]	[34.78]	[0.00]	[34.78]

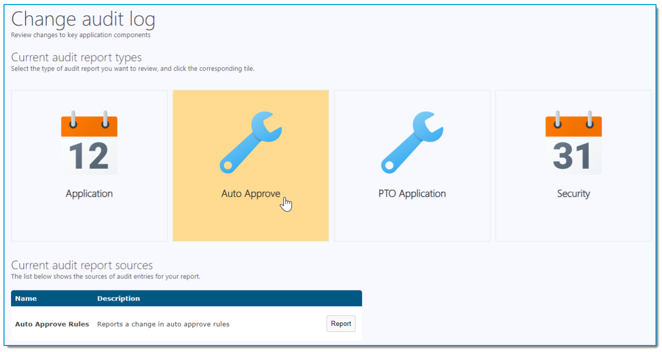
Enhanced audit trail reporting

Report > Administrative & Utility > Change audit log now includes reports for changes to—

- an agent's profile (including activity assignments),
- the Enterprise Model,
- the auto approve rules and settings, and
- the new Self-service Validation Plan.



- The *Change audit log* also has a new tile for Auto Approve rules.



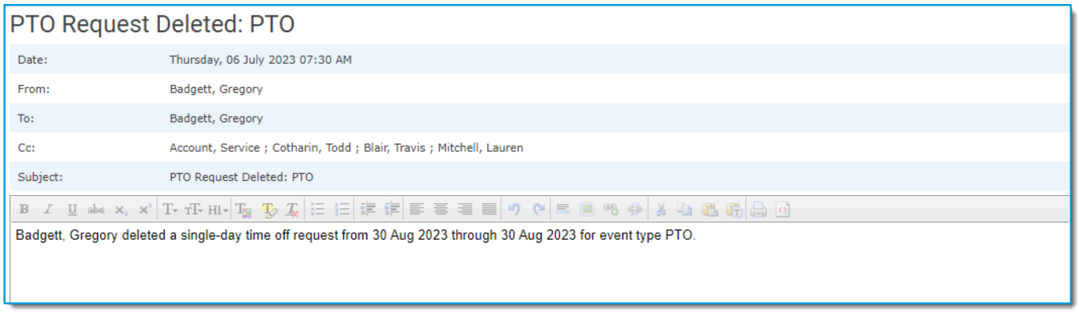
Notifications & Memos

Late check-in or absent

Notification memos are sent to the supervisor tree when agents submit a late check-in or absentee check-in using the Community Everywhere Mobile App.

Deleted PTO request

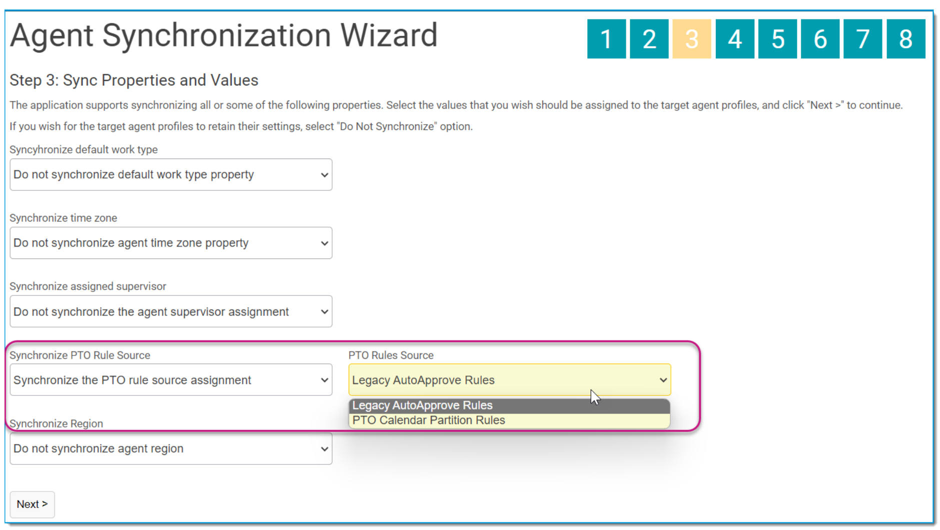
When an agent **deletes** a denied, pending, or approved time off request, there is a notification to the supervisor tree.



PTO Enhancements

Sync PTO Rules Source

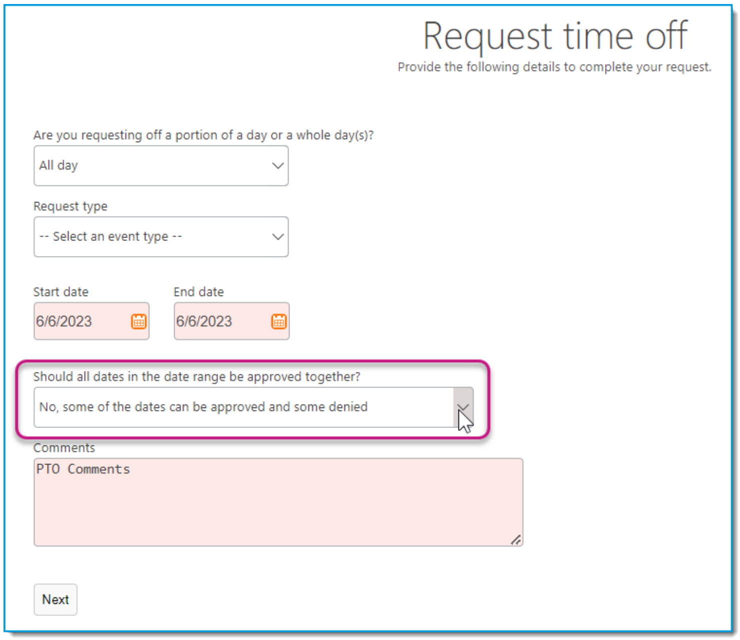
There is an option to sync the PTO Rules Source (PTO Calendar Partition Rules or Legacy AutoApprove Rules) using the Agent Synchronization Wizard. Go to Settings > People & agent templates > Synchronize people > Synchronization people now. In step 3, select the PTO Rules Source.



Request Planned Time Off

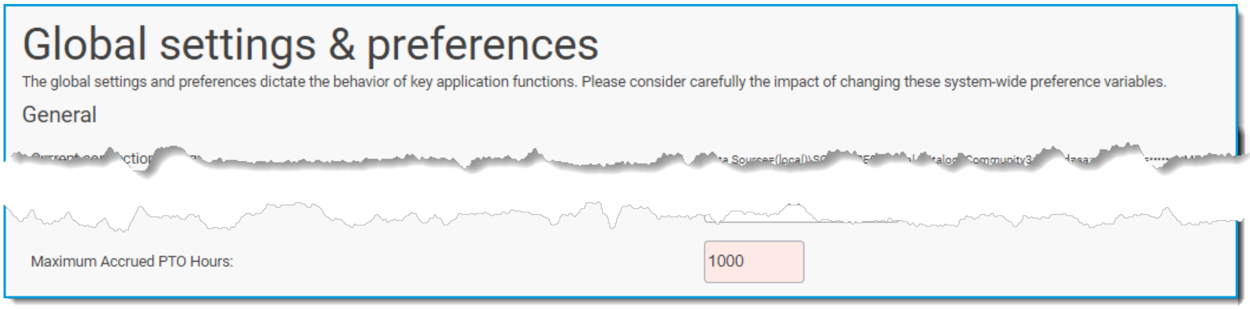
The default response for *Should all dates in the date range be approved together?* is now *No, some of the dates be approved and some denied*. This will prevent inadvertently leaving the response as *Yes* for single day requests or when it is not required that all days be approved, and will allow editing the event on the published schedule.

Note: If using the waiting list in a calendar partition, this option must be set to *Yes*.



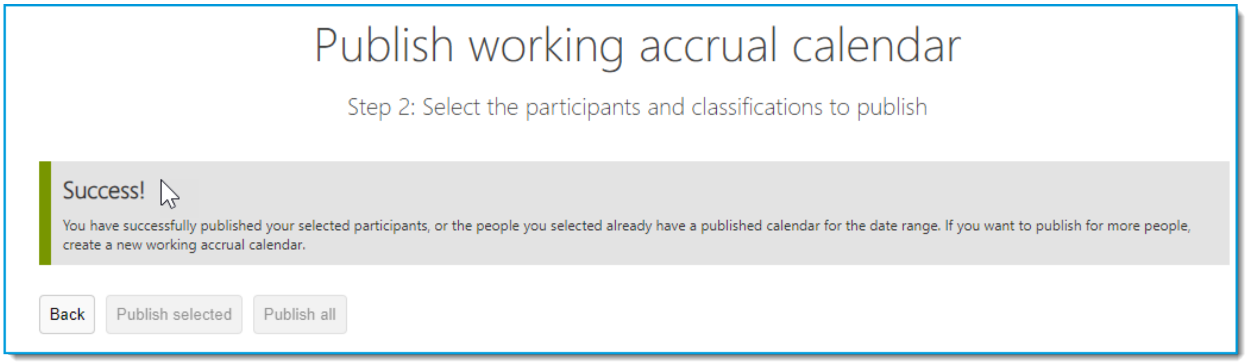
Maximum accrued hours

Plan > All things time off > Time off settings > Accrual schedules | Total annual accrual (in hours): In the *Global settings & preferences* you can customize the maximum number of accrued hours used in PTO policy configuration Default is 400; maximum is 1000.



Publishing a working accrual calendar

After publishing a working accrual calendar, instead of a warning the on-screen message displays “Success!”



Bid round override validation

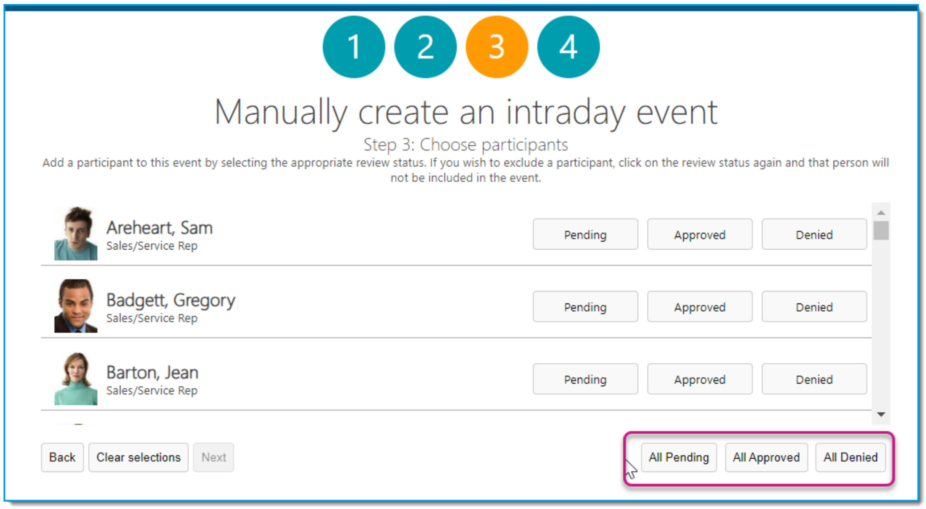
Administrators may override an agent’s bid round.

- If the bid round is **not yet committed,** then the bid administrator can override the round validation status.
- If the bid round is **invalid, pending validation, or valid,** then the bid administrator can override the validation status.
- If the bid round is **already committed,** then the bid administrator cannot override the validation status.

Intraday events for multiple people

Plan > All things time off > Time off events > Create intraday events:

When creating an intraday event for multiple people there is now an option to select all people in the list (All Pending | All Approved | All Denied).



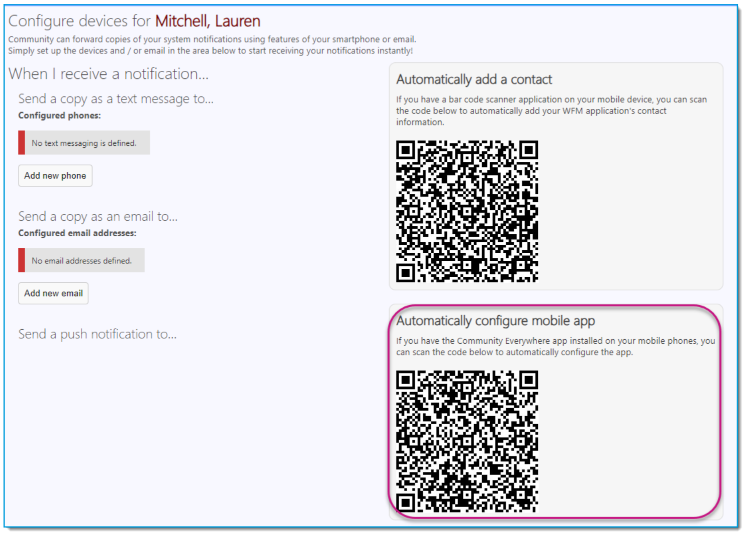
Tools for Supervisors

Mobile app

Supervisors have their own view to monitor team adherence, view and manage attendance, and manage the photo queue, all from the mobile app.

To set up the app with a QR code, supervisors now have access to a Devices page in their menu structure (Properties > Devices). If not visible, check the Applications menu settings.

Scan the code from within the mobile app, enter your password, and you're all set!

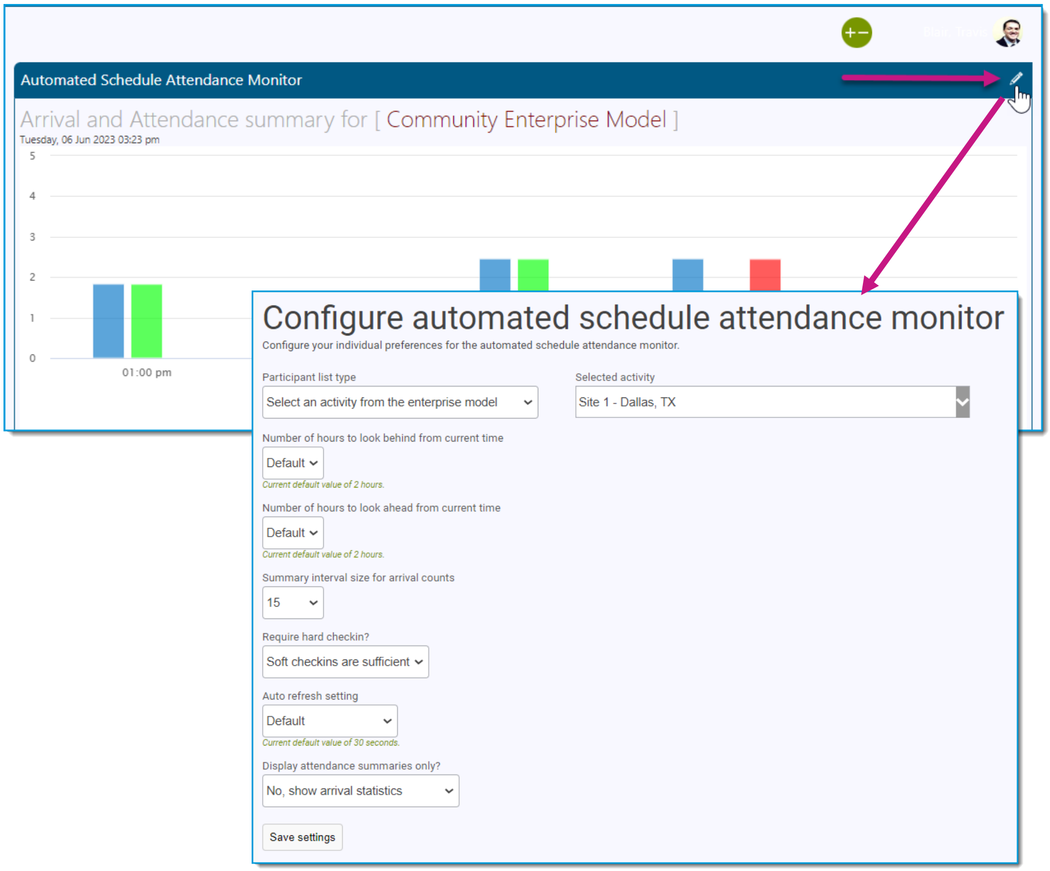


Other mobile app additions

- Language preference transfers from the web application.
- On the Team Adherence page clicking the attendance and adherence buttons replicates the web experience.
- *Hot News* and *Send a message* include the option for selecting the source (Enterprise model, supervisor tree, custom user group).
- When making a time off request, agents can select whether to approve all days together or approve some/deny some.
- Added the ability for agents to delete time off requests from their list.

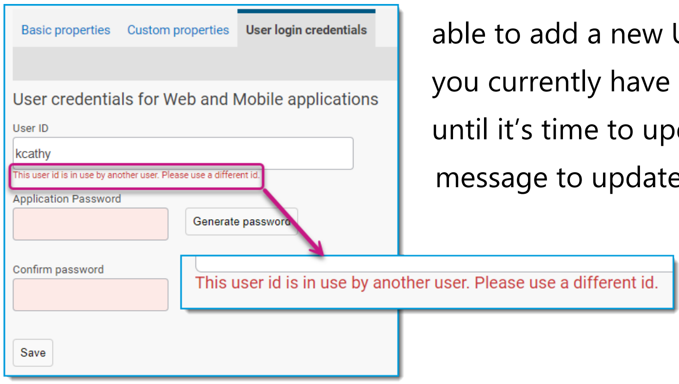
ASAM

Supervisors can now edit and customize their individual preferences for their view of the Automated Schedule Attendance Monitor in the web version. This setting will transfer to the mobile app.



New Security Features

Agent ID and password

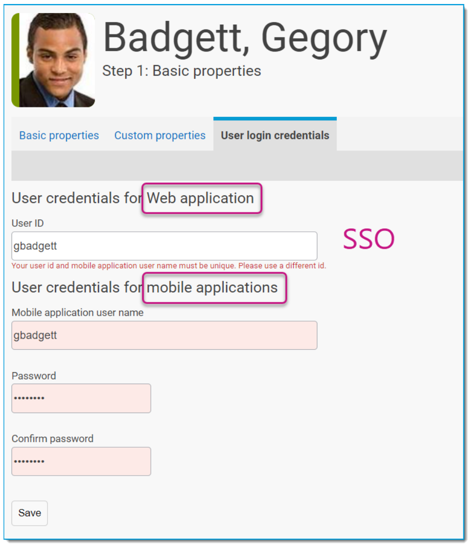


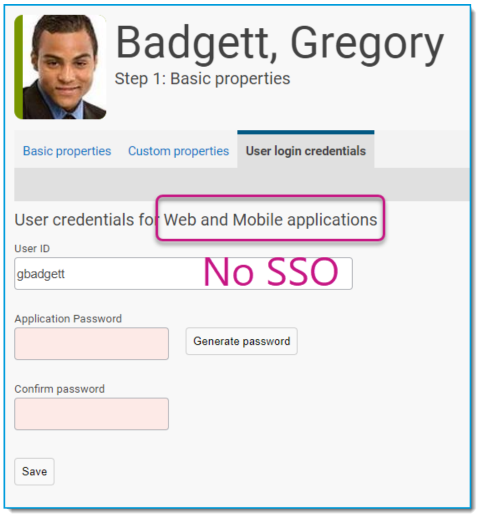
All users must have a unique User ID to log in. You will not be able to add a new User ID that duplicates an existing User ID. If you currently have duplicate User IDs, they will continue to work until it's time to update the password, then there will be a message to update the User ID.

Mobile app and Single Sign-On (SSO)

There are smart labels on the *User login credentials* page: If using the mobile application and SSO/3rd party authentication, there will be fields for two User IDs—web and mobile. If your center does not have a license for the mobile app, there will only be a field for a web application User ID.

~~If using SSO to log in to the web app and your center uses the mobile app, agents will need a unique User ID for the mobile app that is different from the web login User ID. The User login credentials page will show whether separate credentials are required, and agents will be able to create their own mobile User ID on the Properties page.~~ With version 5.1 SP1 HF2, the User ID no longer needs to be unique if using SSO.





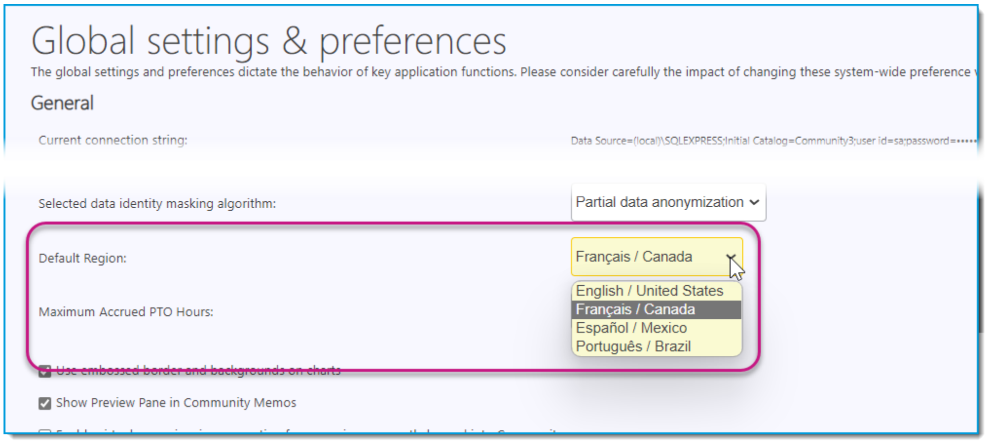
Appendix 1 Region / Language Support

Configuring the language setting

An administrator must make the change for the language preference for individuals and the center.

For the center

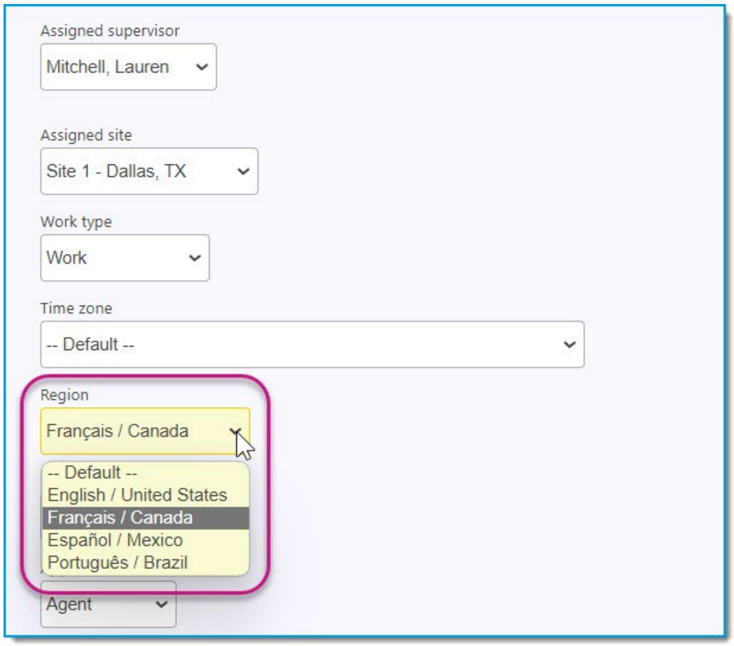
To change the default region / language setting for everyone in the center, navigate to the Global settings & preferences.



At the next login, all users will see Community in the selected language, including the login page.

For an agent

Navigate to the agent's Personal profile | Basic properties tab. In the drop-down for Region, select the preferred language. When the agent next logs in, Community will be in their preferred language. The login page will remain in English.



Synchronize multiple agents to the same language

To change the default language for multiple agents, use the agent synchronization function.

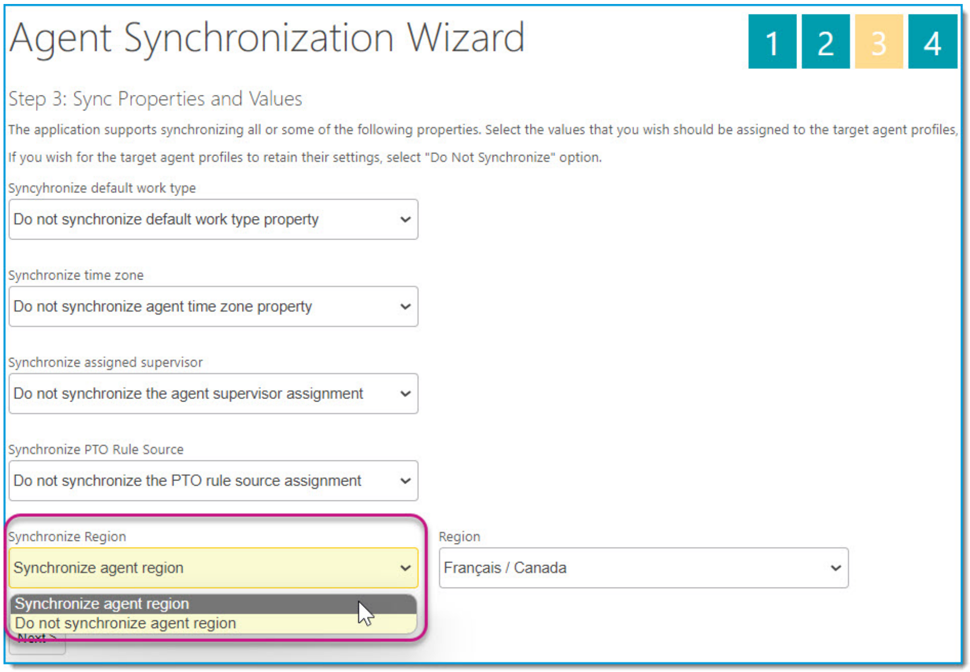
Navigate to Settings > People & agent templates > Synchronize people > Synchronize people now.

Step 1: Introduction. Review the synchronization wizard introduction then click *Next*.

Step 2: Select the site | activity from the drop-down menu. Click *Next*.

Step 3: Sync Properties and Values

- For the first four drop-down menus on the left, change to *Do not synchronize…*
- For Synchronize Region, change the drop-down for *Region* to the preferred language then click *Next*.



Step 4: Sync activity assignments. Click *Skip activities*.

Step 5: Sync schedule template assignments. Click *Skip schedule templates*.

Step 6: Select Participating Agents. Select people by Activity, Supervisor, or Manually. Click *Next*.

Step 7: Confirm Sync settings. Review and confirm selections then click *Synchronize agents*.

Step 8: Synchronization Complete. Review the update status then click *Finish*.

When the agents log in, CommunityWFM will display in the selected language.

Sync template

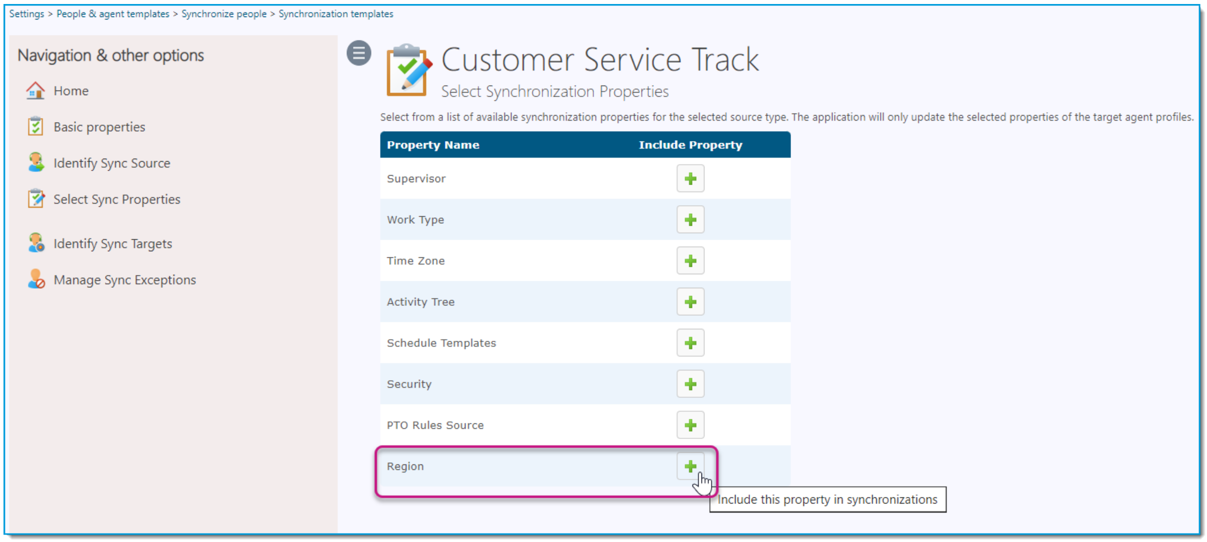
You can also create a synchronization template that includes region / language. Navigate to Settings > People & agent templates > Synchronize people > Synchronization templates.

Select *Click here to create a new agent synchronization template.*

Enter a name; description is option.

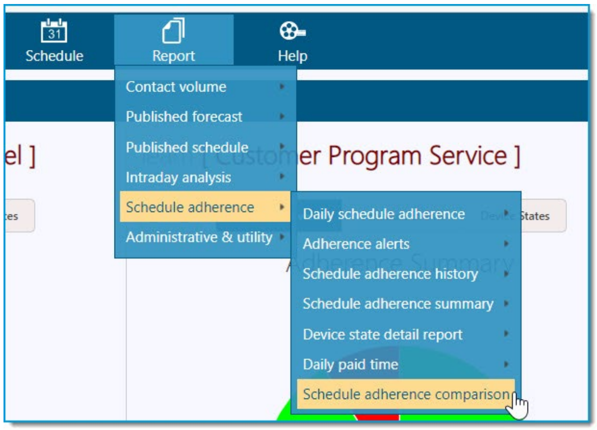
If desired, check the box to enable automatic updates for this synchronization template.

Follow the Steps to Success and in the *Select Sync Properties* step, make sure Region is checked as a synchronization property.

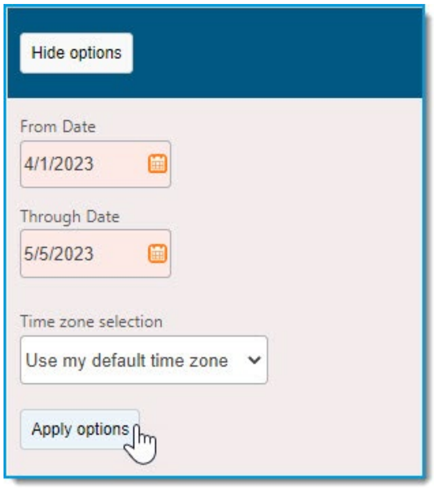


Appendix 2 Adherence Comparison Report

To get started, navigate to Report > Schedule adherence > Schedule adherence comparison.

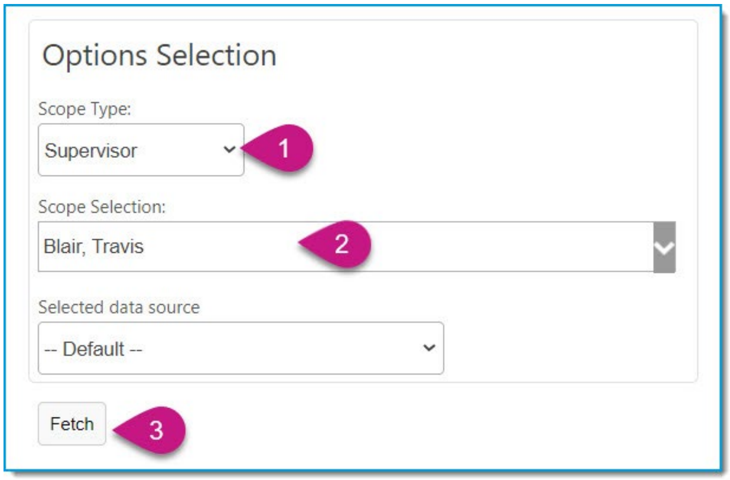


Select a date range in the options panel then click *Apply options*.



Select the first item for the comparison:

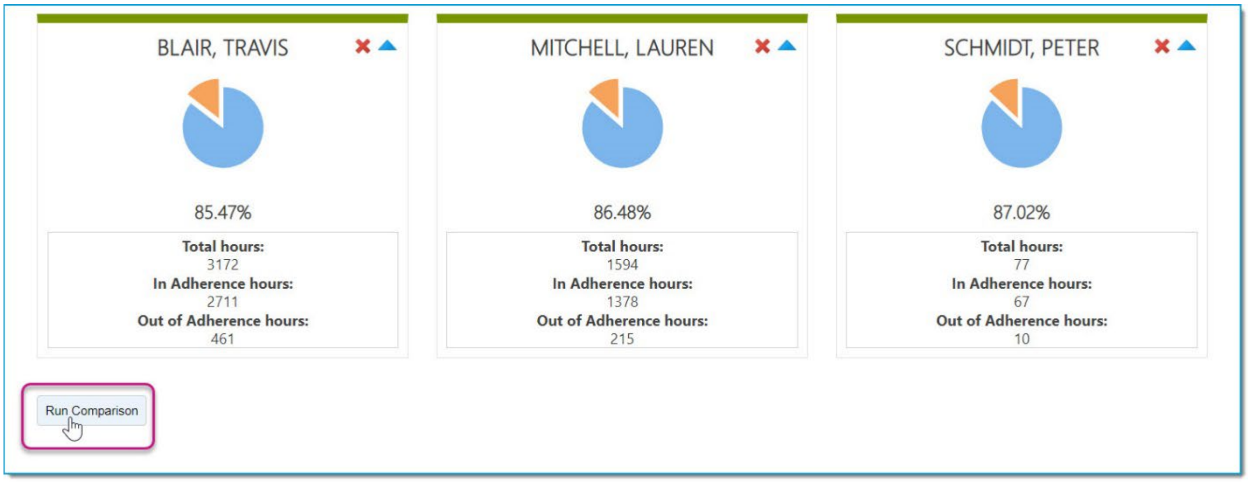
1. In *Scope Selection,* select Enterprise Model, Supervisor Group, or Custom User Group.
2. Select the item to compare in the Scope Selection drop-down menu.
3. Click Fetch.



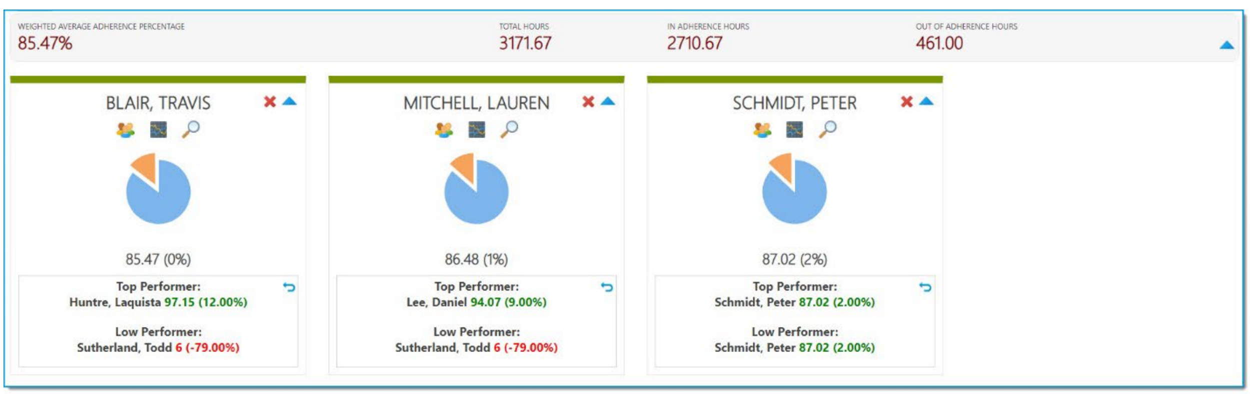
4. Return to the *Options Selection* section and use the same steps to select the next item to add to the comparison.

5. Repeat for up to five scopes.

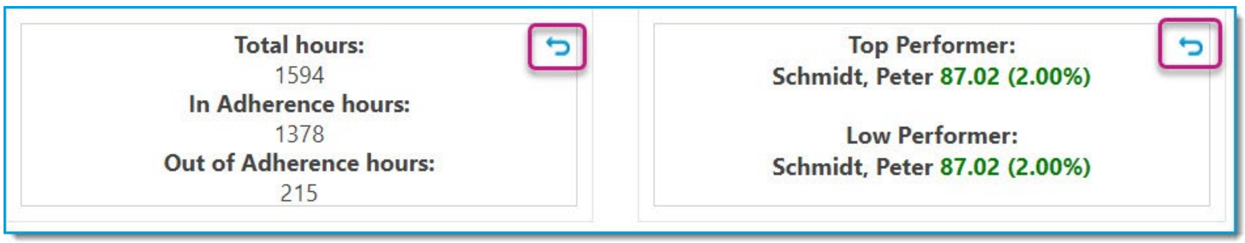
6. After making all selections, click *Run Comparison*.



The dashboard shows each site/activity/supervisor/group, the overall adherence percentage, top and low performer, and includes graphs with links to expose details.



Click the blue arrow to toggle between the overall adherence hour stats and top/low performer.



Use the icons at the top of each item to view additional data.

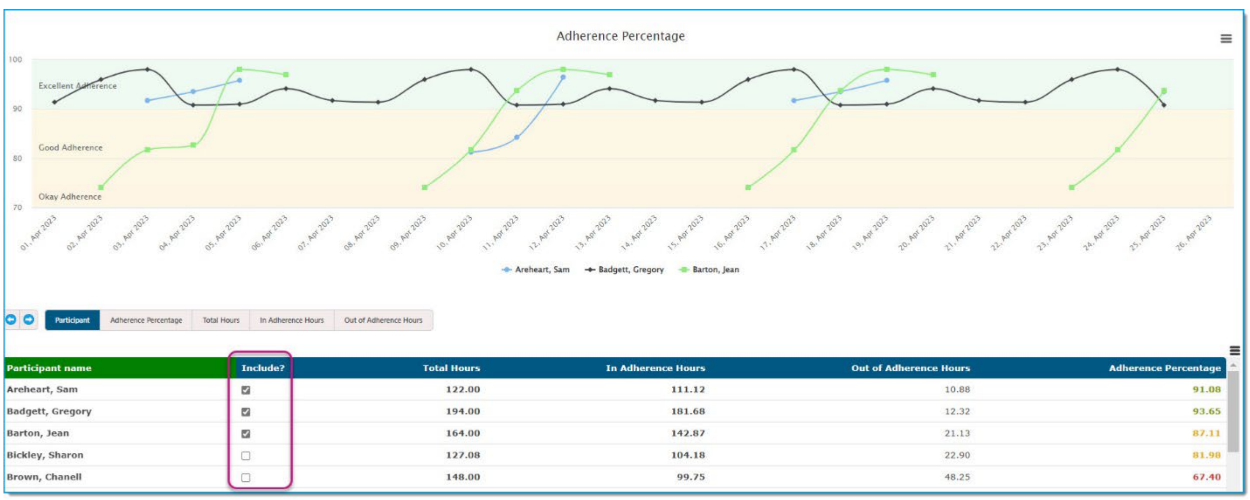
Use the blue arrows ▼▲ to expand / collapse the sections for easier viewing. Click the red X to remove the item from the comparison.

The people icon will display on the bottom of the screen the people in that activity.

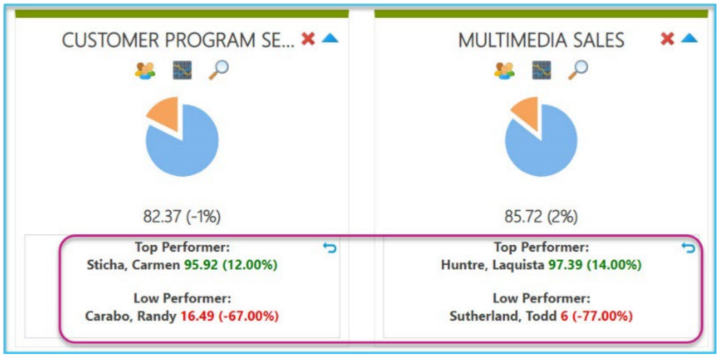
The graph icon will display a graph of the adherence for that activity over the time of the report. Click on the graph icon in multiple activities to add them to the display.

Click the magnifying glass icon to launch a new window with the adherence summary report for that activity.

When viewing the list of participants, click the *Include* checkbox in the table to add that person to the graph. Uncheck to remove them from the graph.



For each selected activity, view the top performer and low performer and their respective adherence percentage. The percentage next to their score reflects the difference from the mean.



As with most charts and tables, there is the option to export the data by clicking the hamburger menu above the graph/table.