



Community Essentials

Setup Guide

For Community Software Version 5.x+

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About This Document

This document will help you set up the parameters necessary for your overall reporting structure, the source of your contact data, and user profile data for forecasting and scheduling.

Getting Started

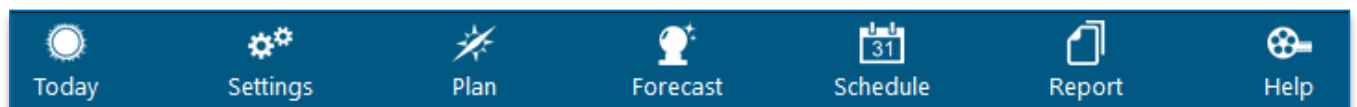
Welcome to **Essentials!** You have successfully logged in.

The tabs at the top of the screen are the primary hub of **Essentials**. There are seven tabs for Administrators and Schedulers, six for agents, and four for supervisors.

The screenshot shows the main interface of the CommunityWFM Essentials application. At the top, there is a navigation bar with tabs: Today, Settings, Plan, Forecast, Schedule, Report, and Help. The main content area is divided into several sections:

- Today's Hot News:** A section for quick updates.
- Schedule Transactions:** A list of transactions with options to view outstanding, current, and responses.
- All About Me:** A profile card for the user 'Account, Service' showing title, email, hire date, assigned role (Supervisor), and login time.
- Memos:** A list of incoming memos from 'Account, Service' regarding 'Published Schedule Change Notification' with dates ranging from 7/1/2019 to 1/10/2019.
- Weekly Schedule:** A calendar view showing the published schedule for 'Account, Service' from 09 August 2019 to 15 August 2019. It includes a grid for time slots (12:00 AM to 1:00 PM) and lists staff members like Danican, Matthew and Flores, Oscar.

Administrator and scheduler view:

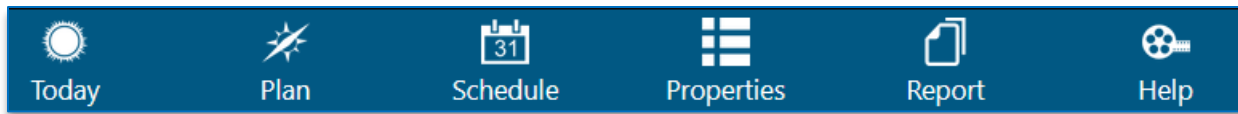


Supervisor view:



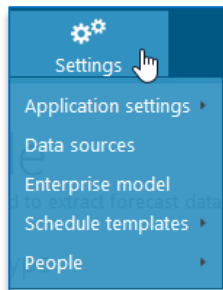


Agent view:



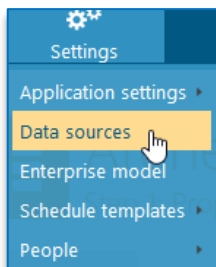
To begin your set up, go to the **Settings** tab.

Basic Setup - Settings



The Settings tab is where you find most of the links necessary for configuring **Essentials** to manage your workforce accurately. The source of your data collection, people, scheduling templates, and business rules are all parts of the basic setup. Most aspects of setup and configuration build upon previously configured items. We have arranged the layout of this guide to ensure an efficient setup.

Data Sources

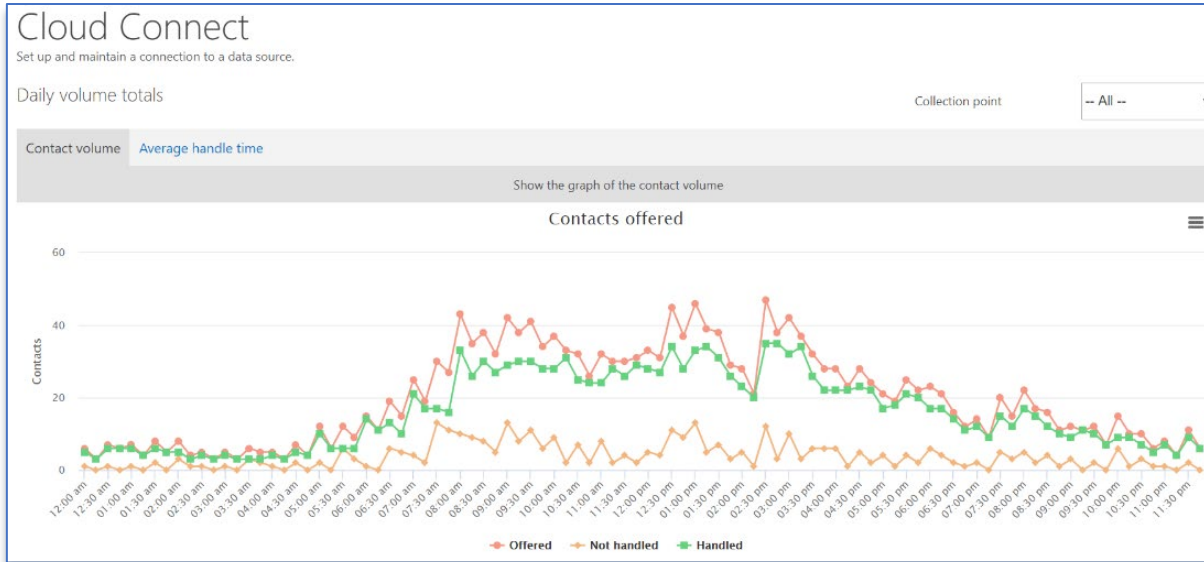


Data sources define the source of historical and real-time data for use in forecasting and real-time adherence reporting. Administrators configure queues, real-time agent phone states, and other fundamental source data.

To get started, hover over the Settings menu, and choose **Data sources**.



This Data Source page shows **Contact volume** and **Average handle time** for all configured collection points combined, for the current day.



At the bottom are four tiles: **Setup, Report, Revise, and Import.**

<p>Setup Review and adjust the connection settings for this data source</p>	<p>Report Report and review contact volume and handle time collection for this data source</p>	<p>Revise Revise historical data collected from this data source</p>	<p>Import Re-import historical data from this data source</p>
--	---	---	--

Your basic data collection parameters should already be established, and your system should be ready to collect data. Do not change the Basic Properties or Connection information contained in Setup, unless specifically directed to do so.

First, you will need to import vital data connections, called collection points.

Import
Import historical contact volume data or collection points for this data source, or review the import log.




This screen allows you to:

- Import historical contact volume & average handle time (AHT) for already defined collection points for a specified date range.
- Import collection points (queues, skills, etc.) directly from the data source
- Review the import log of previously imported activities for a date range.

First, click **Collection points**. This option displays any collection points not previously imported from the data source. Click *Import* on each line you want to import.


Next, click **Contact volume** to bring in historical contact volume & AHT for your imported collection points.

Import options




Contact volume 2

Import contact volume statistics (including handle time) for one or more collection points for a specified date range.




Import contact volume from Excel

Import contact volume statistics (including handle time) from an Excel worksheet.



Collection points 1

Import collection points (queues, skills, etc.) directly from the data source into the application.



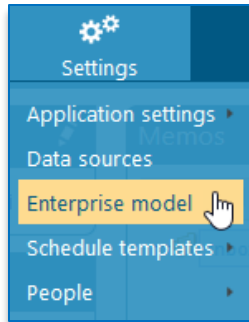
Review the import log

Show the log of prior import activities for a date range.



Enterprise Model

After completing the data sources, set up the Enterprise Model. You can locate the **Enterprise model** in the **Settings** menu.



In this section, you define your physical location and other parameters, such as hours of operation and service targets.

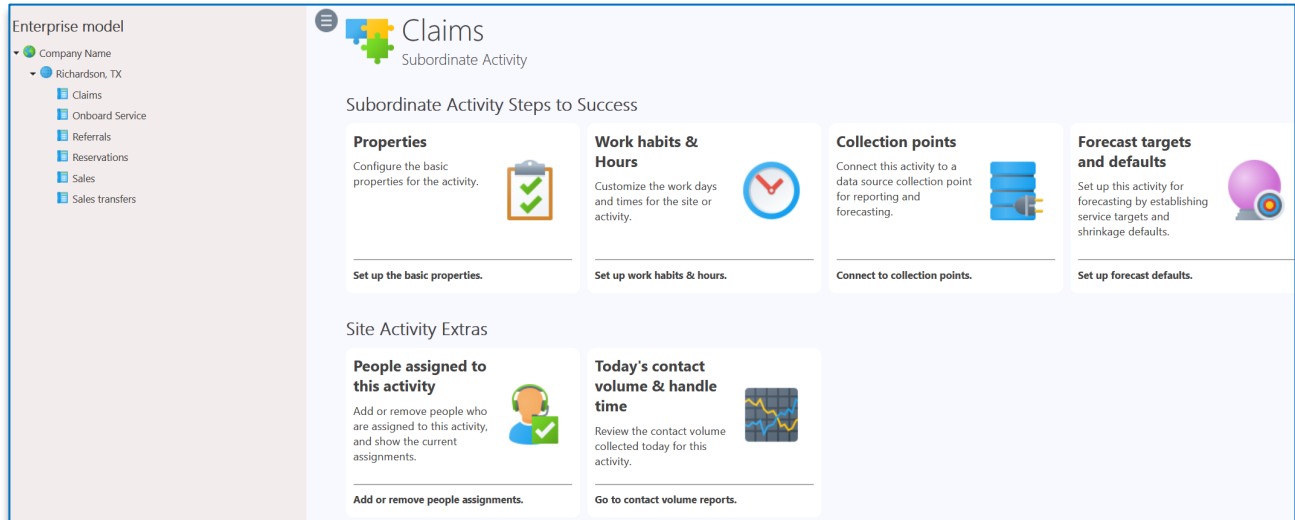
The main screen gives an overview of your **People & licenses** count, as well as an overview of your **People & activities**.

The left side navigation pane shows your Enterprise Model structure, organized by Site, and Activity levels. The activities represent the contacts your agents handle during their scheduled shifts.

Essentials automatically creates new activities for each new queue imported by your data source. Once created, you can customize some settings.

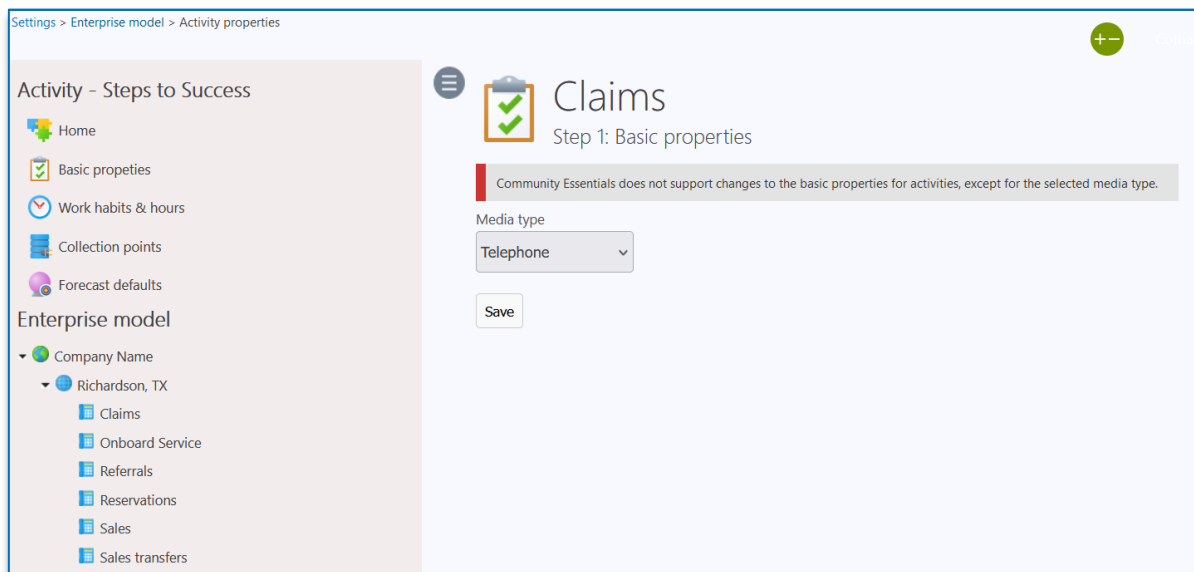


Clicking on an activity takes you to *Steps to Success* where you can customize the activity. By default, an activity inherits the site's properties (in this example, from Richardson, TX), but each setting can be customized.



Properties


Properties allows you to set the media type for the activity, such as telephone, email, chat, etc.





Work Habits & Hours

Work habits & hours allows you to define the hours of operation by day of the week, if different from the site.



Claims


Step 2: Work Habits & Hours

The selected activity has work habits & hours defined. These values are shown below.

Day of week	Work day?	From time	Through time	
Monday	<input checked="" type="checkbox"/>	Mon, 06:00:00 AM v	Mon, 08:00:00 PM v	Copy
Tuesday	<input checked="" type="checkbox"/>	Tue, 06:00:00 AM v	Tue, 08:00:00 PM v	Copy
Wednesday	<input checked="" type="checkbox"/>	Wed, 06:00:00 AM v	Wed, 08:00:00 PM v	Copy
Thursday	<input checked="" type="checkbox"/>	Thu, 06:00:00 AM v	Thu, 08:00:00 PM v	Copy
Friday	<input checked="" type="checkbox"/>	Fri, 06:00:00 AM v	Fri, 08:00:00 PM v	Copy
Saturday	<input checked="" type="checkbox"/>	Sat, 08:00:00 AM v	Sat, 12:00:00 PM v	Copy
Sunday	<input checked="" type="checkbox"/>	Sun, 08:00:00 AM v	Sun, 12:00:00 PM v	Copy

Collection Points

Collection Points are set up during the import process.



Claims


Step 3: Connect to Collection Points

Collection point	Data source	Data source type
Claims	ACD data adapter feed	I3



Forecast Targets and Defaults

Forecast Targets and Defaults allows you to define your service metric (service level or average speed to answer [ASA]) and shrinkage percentages (discretionary and non-discretionary), if different from the site.



Claims

Step 4: Forecast defaults

The selected activity has forecast defaults defined. These values are shown below.

Staffing requirements defaults

Service metric type

Service level percent (%)

Service level time (seconds)

Shrinkage defaults

Discretionary shrinkage percent

Non-discretionary shrinkage percent

Forecast optimizations


Need to fine-tune your forecasts? [Click here](#) to optimize different parts of the forecast for the selected activity.

In the Extras section, you can review and edit people assigned to the activity and generate a report with today's contact volume and AHT.

Site Activity Extras

People assigned to this activity


Add or remove people who are assigned to this activity, and show the current assignments.



[Add or remove people assignments.](#)

Today's contact volume & handle time

Review the contact volume collected today for this activity.



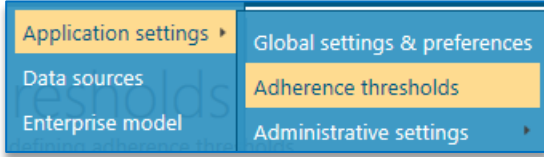
[Go to contact volume reports.](#)

You have now completed setting up the Enterprise Model.



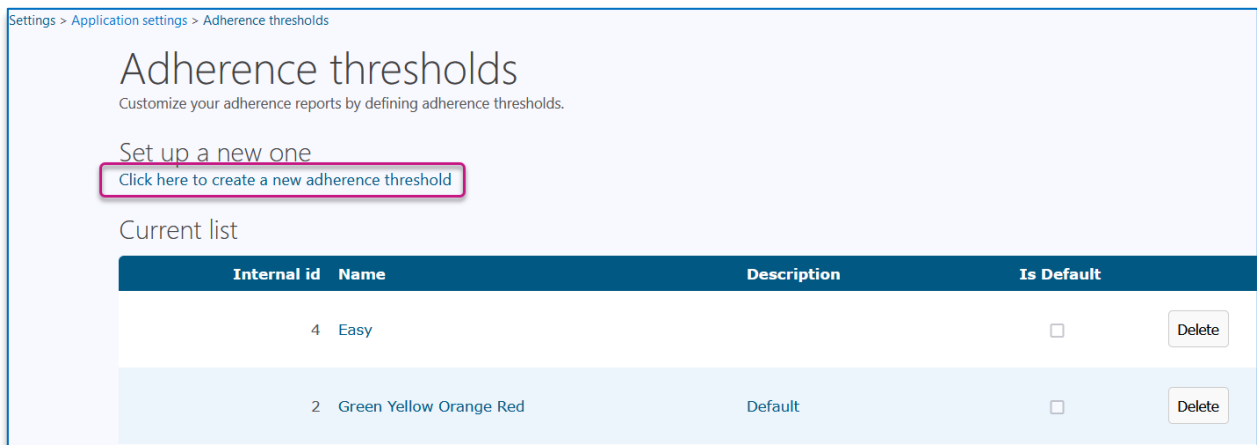
Applications Settings

Adherence Thresholds



Under the Settings menu, navigate to Application Settings, then Adherence Thresholds.

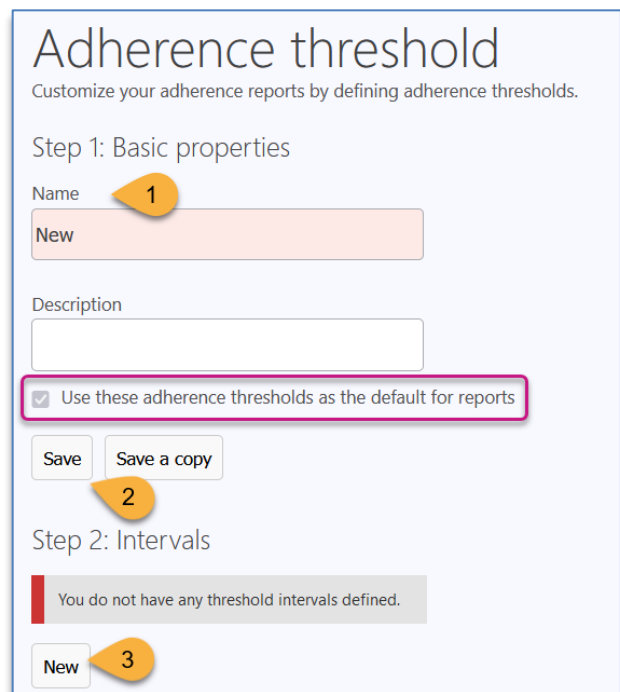
Select [click here to create a new adherence threshold](#).



You will define one adherence threshold as the *Default* by checking the box above *Save*.

After completing Step 1, click *Save* to move to Step 2, where you define adherence thresholds intervals.

Click *New* then tailor your adherence threshold by *minutes* and *color*.





Minutes defines when the adherence line changes to the selected color. You can create multiple intervals.

Scheduling Setup

Essentials uses schedule templates along with break sets as the fundamental building blocks of scheduling. We will create break sets before continuing to schedule templates.

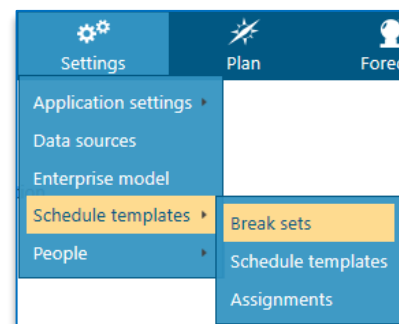
Break sets

A **break set** is a container that defines off-phone events, such as a break or lunch, which can be scheduled on a recurring basis within a schedule template.

Break set behaviors:

- Can be used in multiple schedule templates.
- Events are created on the quarter-hour only :15, :30, :45, :60.
- Typically, you will create a unique break set for each schedule template duration. For example, a 4-hour shift may have a break set with a single break, whereas a 9-hour shift may have a break set with 2 breaks and a 60-minute lunch.
- Earliest Start and Latest Start are configured for each defined event.
- Events can be optimized within the window of opportunity configured for each off-phone event configured in the break set.

Under the **Settings** Menu, navigate to **Schedule templates**, then **Break sets**.





Click any existing break set to review or edit the properties. **Note:** if the 'Delete' button is disabled, this means an existing schedule template is using the break set.

Select *Click here to create a new break set*.

Internal id	Name	Description	
7	6 hr Part time breaks		Delete
1	8.5 Hour Shift		Delete
2	9 Hour Shift		Delete
3	Break only	Short shift break	Delete
8	Call Design	9 hr shift with 1 hour lunch	Delete
9	CF	new break set	Delete

Basic properties: Give your new break set a **Name** and optionally, a more detailed **Description**.

Click *Save*.

Configure off-phone intervals: Click *New* to add a new off-phone event to your break set.



In the pop-up:

- Enter the **Interval name** that will appear on schedules.
- Enter the **Duration** of the event.
- Enter **Early start** in hours from the start of the shift.

(Enter the time in hours from the start of the shift as a decimal value (1.50 = 90 minutes; 2.5 = 150 minutes). Expressing the time in hours allows the break set to be used for all shift start times).

- Enter **Late start** in hours from the start of the shift.
- Select **Event Type** from the drop-down list.
- Repeat the process for each unique off-phone interval to include in break set.

Below is an example of a completed break set with two fifteen minute breaks and one thirty minute lunch.

Step 2: Configure off-phone intervals

Interval name	Duration	Earliest start	Latest start	Event type	Pay status	
Break 1	15	1.50	2.50	Scheduled break	<input checked="" type="checkbox"/>	
Lunch	30	3.50	5.50	Scheduled lunch	<input checked="" type="checkbox"/>	
Break 2	15	6.50	7.50	Scheduled break	<input checked="" type="checkbox"/>	
<input type="button" value="New"/>						



After completing off-phone intervals, test your break set to see how it will behave in a real-world schedule scenario.

Step 3: Test off-phone interval placement

Test schedule duration
 9 hours 1

Test schedule start time
 09:00 AM 2

Show all possible start times and ranges.

Generate sample 3

	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM	9:00 PM	10:00 PM
Sample Work Interval				[Work Interval]													
1st Break					[Break]												
Lunch							[Lunch]										
2nd Break										[Break]							

1. Select a duration from the **Test schedule duration** drop-down.
2. Select a **Test schedule start time**.
3. Click **Generate sample**.

Review how your off-phone intervals might fall within your schedule. If break and lunch windows overlap, it may result in unexpected behaviors. To make adjustments, return to step 2.

***Note:** if you wish to enforce a FIXED time for an off-phone event within a schedule template, set this up in the schedule template configuration section.

Schedule Templates

The foundation of an agent schedule is the schedule template. Schedule templates are assigned to agents with an effective date. Schedules generated under normal circumstances will reflect the schedule template assigned to an agent for the specified schedule date range.

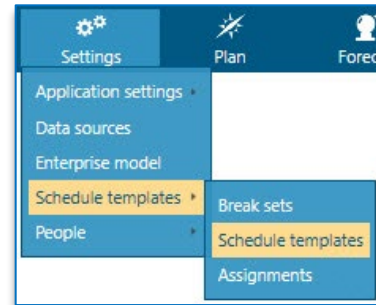
What this means:

- Agents without an assigned schedule template will not receive a schedule.



- Agents assigned a schedule template with an effective date LATER than the scheduled date range, will not receive a schedule.
- Agents can have current and future schedule template assignments, enabling schedulers to run “What-If” scenarios without impacting the current production schedule.

Under **Settings**, navigate to **Schedule templates**, then **Schedule templates**.



Click on an existing schedule template to review or edit the properties or select *Click here to create a new schedule template*.

Set up new a new one
[Click here to create a new schedule template](#)

Manage existing schedule templates
 The following list contains your existing schedule templates. Click the "Advanced filter options" link below to show additional filter options.

Advanced list filter options

Internal Id	Template type	Schedule template name	Description	Assigned folder	
6	Common Day Floating	Anytime schedule		Default	Delete Copy
16	Common Day Floating	common day		Default	Delete Copy
27	Common Day Floating	Common Day Floating Template		Default	Delete Copy

Template Types

There are three schedule template types in **Essentials**, allowing the creation of almost any schedule scenario.

- Fixed
- Rotating
- Common Day Floating



Understanding the capabilities of each template type is essential!

Some scheduling approaches may require a mixture of template types, whereas some environments may use a single type of schedule template.

New schedule template

Click the "Select..." button next to the type of schedule template you want to create.

Select schedule type	Schedule type
Select...	Fixed A schedule that has fixed start and end times.
Select...	Rotating A schedule that rotates through a set of predefined schedules in ordered steps.
Select...	Common Day Floating A schedule that has common work patterns, but allows the optimization engine to pick appropriate day groups. Also guarantees uniform schedule start and break times for all days scheduled for a week.

Fixed Schedule Templates

A fixed schedule template has the following behaviors—

- The start and end times of the schedule are not optimized.
- The start and end times can be different for each scheduled day.
- The duration of the schedule can be different for each scheduled day.
- Split shifts can be defined within a fixed schedule template by creating multiple entries for a single day.
- Break sets can be different for each scheduled day.
- Off-phone events from within the break set can be fixed to specific times.



To create a fixed schedule template:

Click *Select* next to *Fixed*

Give your new schedule template a name and optionally, a more detailed description.

From the drop-down menu, choose to *Create a 24-hour schedule* or *Specify schedule boundaries* (and enter time boundaries).

Click *Save* then *Next*.

Select a *Break set assignment* and the *Work type* for this day of the week. Click the *Save* icon, then add any additional shifts for that day.

Refresh to review the schedule.

To copy the same schedule to other days of the week, use the checkboxes below the calendar. If there are different schedules for different days, use the tabs to enter the information for the other days. After completing all days, click *Finish*.

Start time	End time	Duration (Hours)	Break set assignment	Fixed breaks	Work type
Monday, 08:00:00 AM	Monday, 04:00:00 PM	8.00	8.5 Hour Shift		Work
Monday, 08:00:00 AM	Monday, 08:00:00 AM		-- No Selection --		-- No Selection --

Sample fixed schedule

	12:00 AM	1:00 AM	2:00 AM	3:00 AM	4:00 AM	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM
Monday									Work	Break	Work	Break	Work	Break	Work						
Tuesday																					
Wednesday																					
Thursday																					
Friday																					
Saturday																					
Sunday																					

Copy to other days

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Copy



Common Day Floating Schedule Template


A Common Day Floating Schedule Template has the following behaviors—

- Uses optimization to pick workdays / off days and establishes uniform schedule start times, end times, and optionally off-phone start times for all scheduled days for the scheduled week.
- Days scheduled (work patterns) are influenced by forecasted requirements, assigned activities, agent availability, and schedule preferences. The template's workday patterns are chosen from the defined list of options by the scheduling engine at the time of generating the weekly schedule. If Monday–Friday is not defined as an option in the workday patterns, then the schedule generated cannot be Monday–Friday.
- Consistent start times for each scheduled day.
- Start times of shifts are determined by a range of potential times.
- Consistent schedule duration for each scheduled day.
- Agents can be assigned a different set of shifts each week, based upon the requirements and the schedules assigned to other agents.
- Off-phone events defined in assigned break sets can optionally be consistent or optimized daily.

The Common Day Floating template is typically used in environments that have agent schedule flexibility, thus achieving a more robust coverage of business needs.



Common Day Floating Schedule Template Setup



Common-day schedule

Step 1: Basic properties

Name

Description


Number of scheduled days

Duration (hours)

Break set used for off-phone time

Use common-day behavior for off-phone periods

Work type



New Common Day Floating Template

Step 2: Start time options

This schedule template currently has a duration of **8.50** hours.

Earliest Start Time	Latest Start Time	Minimum Schedule Range	Maximum Schedule Range	
<input type="text" value="Monday, 07:00:00 AM"/>	<input type="text" value="Monday, 09:00:00 AM"/>	07:00:00 AM	05:30:00 PM	<input type="button" value="edit"/> <input type="button" value="delete"/>
<input type="text" value="Monday, 08:00:00 AM"/>	<input type="text" value="Monday, 10:00:00 AM"/>	08:00:00 AM	06:30:00 PM	<input type="button" value="edit"/> <input type="button" value="delete"/>
<input type="text" value="Monday, 12:00:00 AM"/>	<input type="text" value="Monday, 12:00:00 AM"/>			<input type="button" value="add"/>


● Successfully created new Start Time Option. (4/5/2022 1:40:24 PM)

Common day floating schedule templates need at least one start time range.

Sample floating schedule

	12:00 AM	1:00 AM	2:00 AM	3:00 AM	4:00 AM	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM
07:00 AM - 09:00 AM								█	█	█	█	█	█	█	█	█	█	█
08:00 AM - 10:00 AM								█	█	█	█	█	█	█	█	█	█	█










New Common Day Floating Template

7★ Step 3: Day patterns

The number of days for each day pattern must be 5

Day pattern name	Selected work days		
M-F	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
Tu-Sa	<input type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
<input type="text"/>	<input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday		

● Successfully created new Day Pattern. (4/5/2022 1:41:42 PM)

< Back
Finish


Rotating Schedule Template

A Rotating schedule template has the following behaviors—

- It is a container that rotates through multiple Fixed and Common Day Floating Schedule Templates.
- A single schedule template 'Step' can be defined to occur for multiple weeks prior to progressing to the next schedule template 'Step'.
- Commonly used in environments where agents work alternating day/night shifts, or rotating weekend shifts.
- Commonly used to provide optimal schedule options while still providing schedule consistency.



Rotating Schedule Template Setup



Simple rotating schedule

Step 1: Basic properties

Name

Description

Effective date

Step length (in weeks)

Rotating schedule step details


Schedule type

Selected schedule

Additional assignment parameters

Number of copies of this step to create

Creating a new, unsaved rotating schedule step. (4/5/2022 1:47:13 PM)



Simple rotating schedule

Step 2: Rotation steps

Step Order	Rearrange steps	Schedule type	Predefined schedule	
1	<input type="button" value="▲"/> <input type="button" value="▼"/>	Fixed	8 AM - 5 PM Shift	<input type="button" value="📄"/> <input type="button" value="✖"/>
2	<input type="button" value="▲"/> <input type="button" value="▼"/>	Common Day Floating	common day	<input type="button" value="📄"/> <input type="button" value="✖"/>

Successfully restored rotating schedule steps. (4/5/2022 1:46:21 PM)



People Setup

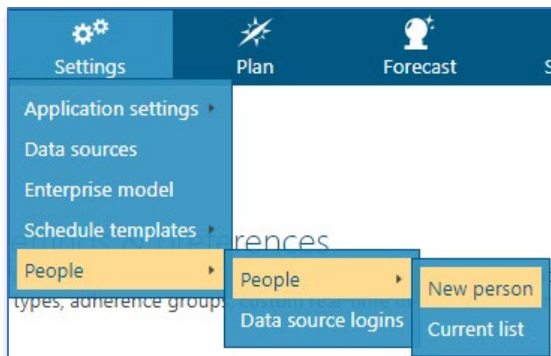
There are three ways to add agents to **Essentials**:

1. Import agents from data source
2. Import agents from an Excel spreadsheet
3. Manually create agents through the People hub



Add your supervisors before your agents so you can assign agents to their supervisors during the setup process.

To manually add new people, go to *Settings > People > People > New Person*.





Complete the following required fields (peach background)

- First name
- Last name
- Hire date
- Tiebreak value (can leave at 0 – not used with Essentials)

The following fields are recommended

- Assigned supervisor
- Assigned site
- Work type
- Time zone
- Application role (Agent, Supervisor, Scheduler, Administrator)

The following fields are optional

- Middle initial
- Employee ID
- Title
- Email address
- Employee classification

New person

<small>First name</small>	<small>Last name</small>	<small>MI</small>
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>
<small>Hire date</small>		
<input style="width: 90%;" type="text" value="8/19/2019"/>		
<small>Tiebreak value</small>		
<input style="width: 90%;" type="text" value="0"/>		
<small>Employee id</small>		
<input style="width: 90%;" type="text"/>		
<small>Title</small>		
<input style="width: 90%;" type="text"/>		
<small>Email address</small>		
<input style="width: 90%;" type="text"/>		
<small>Assigned supervisor</small>		
<input style="width: 90%;" type="text" value="-- No supervisor --"/>		
<small>Assigned site</small>		
<input style="width: 90%;" type="text" value="Richardson, TX"/>		
<small>Work type</small>		
<input style="width: 90%;" type="text" value="E-mail Work"/>		
<small>Time zone</small>		
<input style="width: 90%;" type="text" value="-- Default --"/>		
<small>Employee classification</small>		
<input style="width: 90%;" type="text" value="-- None --"/>		
<small>Application role</small>		
<input style="width: 90%;" type="text" value="Agent"/>		
<input type="button" value="Save"/>		<input type="button" value="Save and add another one"/>

When finished, click **Save**. If you plan to add more people, click **Save and add another one**.



Saving brings you to the *Steps to Success* for your new person and a list of previously created profiles.

McBride, Natasha
Assigned to supervisor [Cotharin, Todd]
Manage this person's complete profile for use in a variety of application functions.

Required steps to success

- Properties**: Configure the basic properties for Natasha. *Set up profile properties.*
- Activities**: Assign activities to Natasha for scheduling and reporting purposes. *Set up activity assignments.*
- Scheduling**: Set up shift assignments, schedule availability and schedule preferences for Natasha. *Set up scheduling parameters.*
- Adherence**: Set up Natasha for adherence reporting for each data source. *Set up adherence parameters.*
- Time off settings**: Set up Natasha's time off parameters, and review current and past time off activity. *Configure time off settings.*
- Employment transitions**: Review the employment history for Natasha, and optionally create new employment transitions. *Go to agent employment transitions.*

Advanced configuration

Complete the setup of your person using the **Steps to Success** tiles.

Properties

Basic properties allows you to enter/review general information about the Agent. Within this screen, you can edit:

- Name
- Hire date
- Tiebreak value
- Employee ID
- Title
- Email address
- Assigned supervisor

Click the *User Login credentials* tab to enter the Username and Password for the Agent.

McBride, Natasha
Step 1: Basic properties

Basic properties | [User login credentials](#)

Edit the basic properties

First name: | Last name: | Middle initial:

Hire date:

Tiebreak value:

Employee ID:

Title:

Email address:

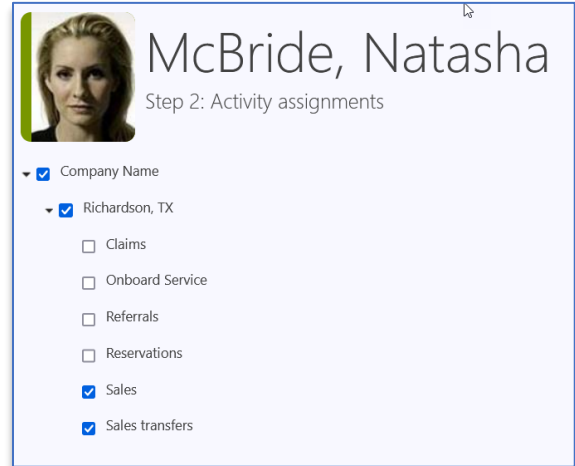
Assigned supervisor:



Activity assignments

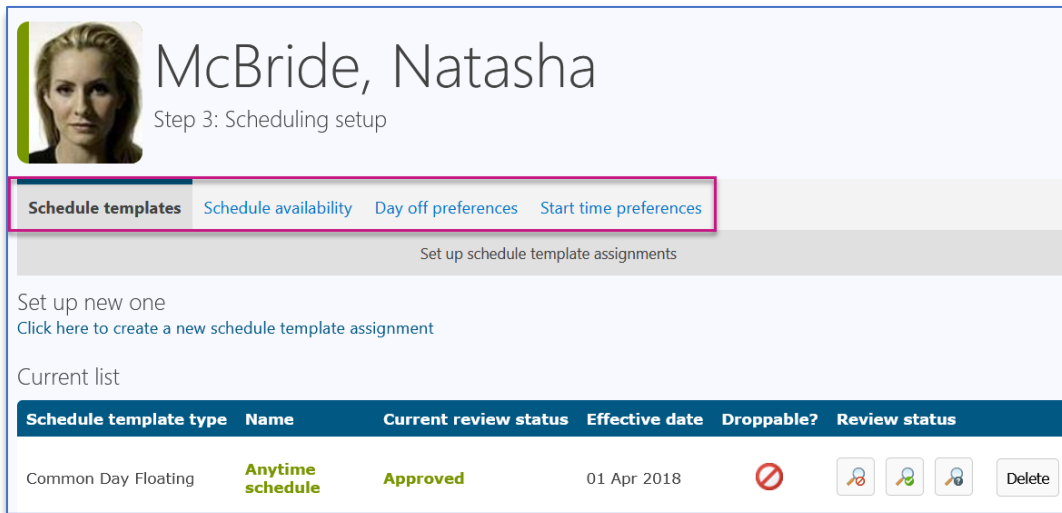
Activity Assignments is where you assign activities (contact types).


Check or uncheck activities to represent the work performed by the agent during their work shifts.



Scheduling setup

Scheduling Setup is where you assign a schedule template to the agent, and can complete the optional setup of the Agent’s availability, day off preferences, and start time preferences. These optional steps can be completed by the agents.



Schedule template type	Name	Current review status	Effective date	Droppable?	Review status
Common Day Floating	Anytime schedule	Approved	01 Apr 2018	No	



Optional **Scheduling Setup** steps:

Availability

Availability allows the agent to define hours that they are available to work on each day of the week. This restricts the output of the schedules when creating an optimized schedule.

In this example, Natasha is only available to work during the hours of 9:00 am to 4:00 pm, Monday through Friday, due to her children’s school schedule. After this is created, saved, and approved, it takes effect based on the assigned effective date.

Effective Date:

Description:

Availability Patterns

Available?	Day	Available From	Available Through	
<input checked="" type="checkbox"/>	Monday	Monday, 09:00:00 AM	Monday, 04:00:00 PM	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Tuesday	Tuesday, 09:00:00 AM	Tuesday, 04:00:00 PM	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Wednesday	Wednesday, 09:00:00 AM	Wednesday, 04:00:00 PM	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Thursday	Thursday, 09:00:00 AM	Thursday, 04:00:00 PM	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Friday	Friday, 09:00:00 AM	Friday, 04:00:00 PM	<input type="button" value="Copy"/>
<input type="checkbox"/>	Saturday	-- Any Time --	-- Any Time --	<input type="button" value="Copy"/>
<input type="checkbox"/>	Sunday	-- Any Time --	-- Any Time --	<input type="button" value="Copy"/>

Availability Review Status



Day Off Preferences

McBride, Natasha

Step 3: Scheduling setup

Schedule templates
Schedule availability
Day off preferences
Start time preferences

Set up day off preferences

Preference priority setting

Prioritize the day off preferences over the start time preferences

Here, we select whether this person would rather have specific days off or consecutive days off. Note that the assigned schedule template dictates availability of consecutive days off.

Day pattern rule

Prefer specific days off over consecutive days off

In this section, we need to identify the preferred days off from work. Please allocate a total of 100 "points" across each day of the week. For each day, higher numbers indicate a more desirable day **off** from work.

Day of week	Day off weight
Monday	<input style="width: 40px; height: 20px;" type="text"/>
Tuesday	<input style="width: 40px; height: 20px;" type="text"/>
Wednesday	<input style="width: 40px; height: 20px;" type="text"/>
Thursday	<input style="width: 40px; height: 20px;" type="text"/>
Friday	<input style="width: 40px; height: 20px;" type="text"/>
Saturday	<input style="width: 40px; height: 20px;" type="text"/>
Sunday	<input style="width: 40px; height: 20px;" type="text"/>

Select the **Preference Priority Setting Options**

- Prioritize the day off preferences over the start time preferences
- Prioritize the start time over the day off preferences
- Do not prioritize either start time or day off, but instead use the most favorable combination



Next, define the **Day Pattern Rule**, choosing from:

- Preferring consecutive days off over any specific days off.
- Preferring specific days off over consecutive days off.

Agents have a total of 100 points to allocate across the preferred days off. For each day, higher values indicate a more desired day off. Click *Save* when complete.

Start Time Preferences

In this section, agents define preferred start times by day. Select *Click here to create a new start time preference* to add an entry on any given day. Defined start times can be copied to other days on the right side of the screen.

Use the up and down arrows to rank the preferences.

New start time preference

Start time on **Monday**

Start time: 8 : 00 : AM

Save Cancel

McBride, Natasha
Step 3: Scheduling setup

Schedule templates | Schedule availability | Day off preferences | **Start time preferences**

Set up start time preferences

Set up new one
Click here to create a new start time preference

Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday

Start time preferences for Monday

Reference number	Ordinal	Preferred start time			
55	1	07:30 AM	▲	▼	Delete

Copy to other days

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Replicate



Adherence setup

Adherence Setup is where you can enter the Agent’s phone login ID for adherence tracking purposes.

McBride, Natasha

Step 4: Adherence setup

Data source active?	Data source name	Data source type	Device ID	Default?	
✓	ACD data adapter feed	I3	dsaker	✓	Edit

Forecast Setup

Quick Forecasting uses your default forecast settings to generate a complete forecast for the date range you specify. **Service Objective** and **Shrinkage** values are defined in the Enterprise Model. Agent activity assignments, utilized in developing multi-skill requirements, are defined in the agent profiles. This leaves the **Forecast Profiles** as the remaining step.

Select [Click here to create a new forecast profile](#) and complete the basic properties.

Forecast profiles

Build and manage forecast profiles to use later when you generate forecasts.

Set up a new one
[Click here to create a new forecast profile](#)

Manage existing forecast profiles
 The following list contains your existing forecast profiles.

Reference Number	Profile Name	Description	Forecast Component	Profile Type	Default for Quick Forecast?	
106	1 - Most recent 12 weeks	12 weeks	Contact volume	Dynamic Profile	False	Delete
107	1 - Most recent 8 weeks	8 Weeks	Contact volume	Dynamic Profile	False	Delete
15	15 of the month billing week		Contact volume	Static Profile	False	Delete
163	16 week		Contact volume	Dynamic Profile	False	Delete
185	1st week		Contact volume	Static Profile	False	Delete



You must have an assigned **Default forecast profile** to use the **Quick forecast**. When creating the forecast profiles, select *Yes for Use this profile for quick forecasting?* for the forecast you wish to use for quick forecasting.

Only one forecast can be designated as the default for quick forecasts.

Forecast profile

Create forecast data profiles to be used to extract forecast data from the system or an external data source

Step 1: Basic properties

Name

Description

Use this profile for quick forecasting?
No, do not use as the quick forecast default ▾

This profile will contain what type of data?
Contact volume ▾

[Next >](#)

Next, select the profile type.

Forecast profile

Create forecast data profiles to be used to extract forecast data from the system or an external data source

1 2 3

Step 2: Select data source type

Name
New forecast profile

Data source type

Dynamic Profile
Historical data using a consecutive number of weeks in the past [Select](#)

Static Profile
Historical data using specific weeks of history that I will choose [Select](#)

Data Source Type:

[< Back](#) [Next >](#)



Forecast Profiles

Dynamic Profile

Forecast profile

Create forecast data profiles to be used to extract forecast data from the system or an external data source

1
2
3

Step 3: Define forecast profile collection parameters

Name
New forecast profile

Data source type
Dynamic Profile

Use historical data collection for forecast data

Number of past weeks to include

Volume import option

Dynamic forecast profiles are the most commonly used type. Dynamic forecast profiles allow you to specify how many weeks of the most recent contact volume & AHT history to use in calculating the upcoming forecast.

For example, a dynamic forecast profile using the past 4 weeks would use the most recent 4 weeks in a rolling manner, meaning when a new week begins, the forecast profile will dynamically adjust to the most recent 4 weeks.

Static Profile

Static forecast profiles allow users to target specific weeks in history for an upcoming forecast. You can select any number of weeks from the calendar for inclusion in a forecast.



Static forecast profiles are most commonly used in scenarios where there is a holiday. For example, when you are forecasting for a week that includes a Monday holiday that will change the distribution of volume throughout the week. In this scenario, you could choose previous weeks of history where a Monday holiday occurred to generate a forecast that more closely resembles expectations.

Forecast profile

Create forecast data profiles to be used to extract forecast data from the system or an external data source

Step 3: Define forecast profile collection parameters

Name
static profile

Data source type
Static Profile

Volume import option
Import only intervals with collected volume in the static weeks selected ▾

Use historical data collection from the selected weeks for forecast data

< **July 2022 - September 2022** >

July 2022							August 2022							September 2022						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
4	5	6	7	8	9	10	1	2	3	4	5	6	7	5	6	7	8	9	10	11
11	12	13	14	15	16	17	8	9	10	11	12	13	14	12	13	14	15	16	17	18
18	19	20	21	22	23	24	15	16	17	18	19	20	21	19	20	21	22	23	24	25
25	26	27	28	29	30	31	22	23	24	25	26	27	28	26	27	28	29	30	1	2
							29	30	31	1	2	3	4							

From date **Through date**

Monday, July 4, 2022 Sunday, July 10, 2022

< Back Reset all Finish

Now you have set up the necessary parameters to use the **Essentials** application!

Please review the Essentials Process Guide to review how to create and publish forecasts, how to create, publish and modify agent schedules, and running reports.