



Data Import with Excel

For CommunityWFM 5.0+
Version October 28, 2024

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Excel data import preparation

We recommend downloading the Excel template from the system (see step 1).

The template includes the required fields and proper formats. Time should be in a 24-hour clock.

	A	B	C	D	E
1	Skill Id	Time Interval	Contacts Offered	Contacts Not Handled	Total Talk Time
2	(device id from data source collection points)	(mm/dd/yyyy hh:mm)	(integer)	(integer)	(seconds)
3					

To find the Skill Id (device id) select *Show the setup options dialog* in the Setup Options tile (Settings > Data sources).

Setup options
Review and adjust the basic properties, connection settings, collection points and device state mappings.

Show the setup options dialog.

Reports
Report and review contact volume and handle time history for this data source or any collection point.

Run contact volume history reports.

Revise
Revise the historical contact volume and handle time for any collection point.

Revise historical volume.

Import
Import historical contact volume history or collection points associated with this data source.

Show the import options dialog.

Open *Collection Points* to see the Device id for the data source.

Id	Device id	Friendly name	Description	Active?	
39	Billing	Billing	Billing	☒	    
2	Developer support	Developer support	Developer support	☒	    
38	Operator	Operator	Operator	☒	    
8	Research	Research	Research	☒	    
1	Retention	Retention	Retention	☒	    

Import into the data source

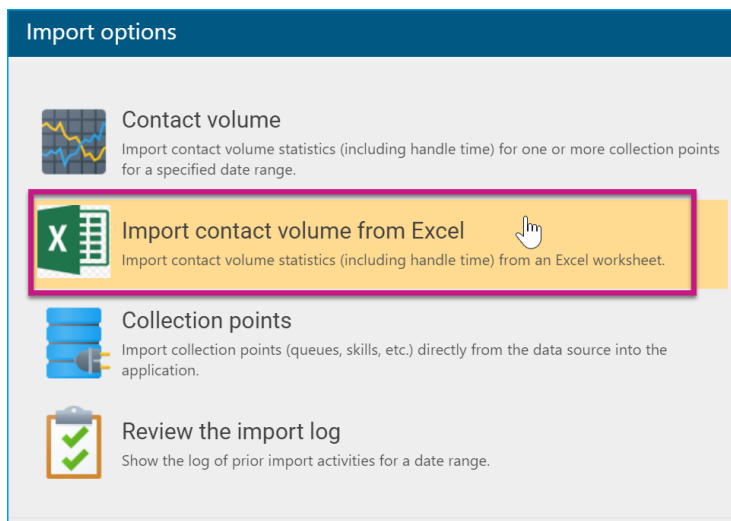
Navigate to Settings > Data sources

Select the data source for your center.

Scroll down to the Import tile and select *Show the import options dialog*.

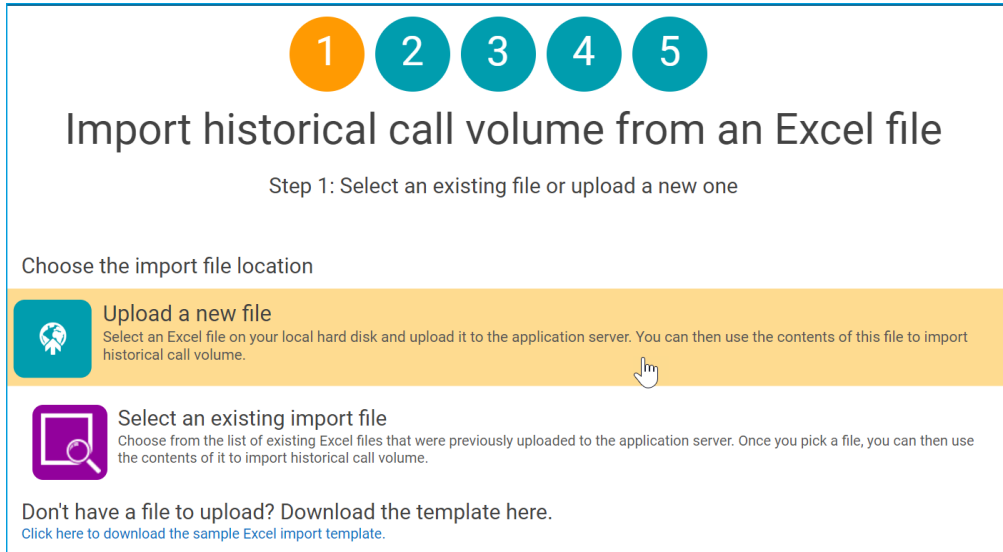


In the pop-up menu select *Import contact volume from Excel*.



Step 1: Select an existing file or upload a new one

Select whether to *Upload a new file* or *Select an existing import file*. This screen will have slightly different options depending on whether there are previously uploaded files.



1 2 3 4 5

Import historical call volume from an Excel file

Step 1: Select an existing file or upload a new one

Choose the import file location



Upload a new file
Select an Excel file on your local hard disk and upload it to the application server. You can then use the contents of this file to import historical call volume.



Select an existing import file
Choose from the list of existing Excel files that were previously uploaded to the application server. Once you pick a file, you can then use the contents of it to import historical call volume.

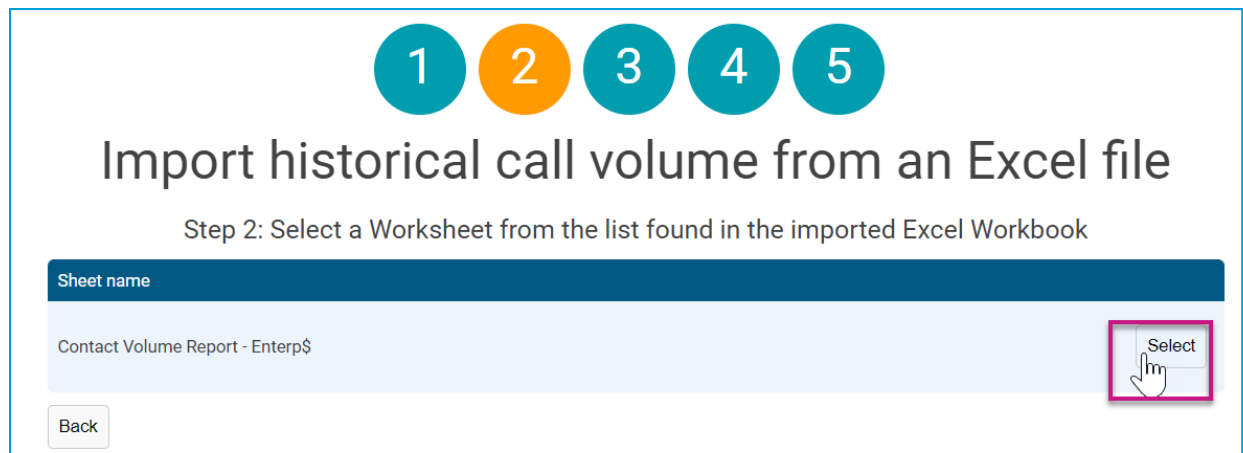
Don't have a file to upload? Download the template here.
[Click here to download the sample Excel import template.](#)

Note: The file must not be open when uploading.

Typically, you'll import one skill at a time. There is a row limit of ~5000 when importing.

Step 2: Select the worksheet

Select the worksheet from the uploaded or existing workbook. You may import only one worksheet at a time.



1 2 3 4 5

Import historical call volume from an Excel file

Step 2: Select a Worksheet from the list found in the imported Excel Workbook

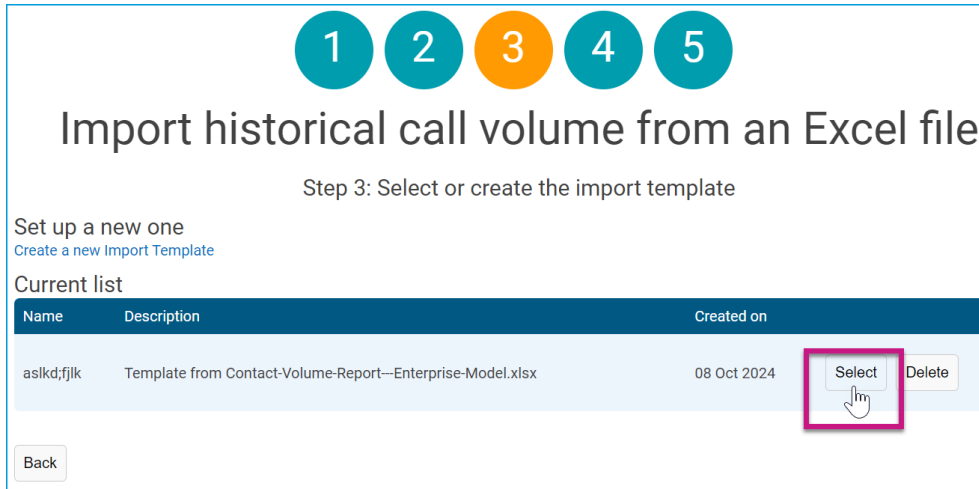
Sheet name
Contact Volume Report - Enterp\$

Back

Select

Step 3: Select or create the import template

The template is a mapping device to make sure the data imported matches the tables in the system. Once created you shouldn't have to have more than one template.



1 2 3 4 5

Import historical call volume from an Excel file

Step 3: Select or create the import template

Set up a new one
[Create a new Import Template](#)

Current list

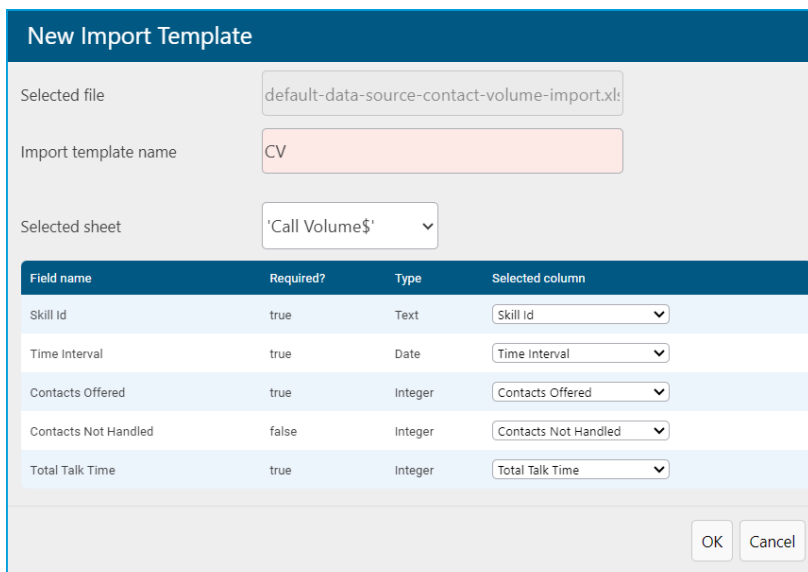
Name	Description	Created on	
askld;fjlk	Template from Contact-Volume-Report---Enterprise-Model.xlsx	08 Oct 2024	Select Delete

[Back](#)

Select from existing templates or create a new template.

Create a new Import Template

The template defines the field names, required or not, the data type, and the column name. Confirm that each field name matches a column in your imported worksheet then click **OK**.



New Import Template

Selected file: default-data-source-contact-volume-import.xls

Import template name: CV

Selected sheet: 'Call Volume\$'

Field name	Required?	Type	Selected column
Skill Id	true	Text	Skill Id
Time Interval	true	Date	Time Interval
Contacts Offered	true	Integer	Contacts Offered
Contacts Not Handled	false	Integer	Contacts Not Handled
Total Talk Time	true	Integer	Total Talk Time

OK Cancel

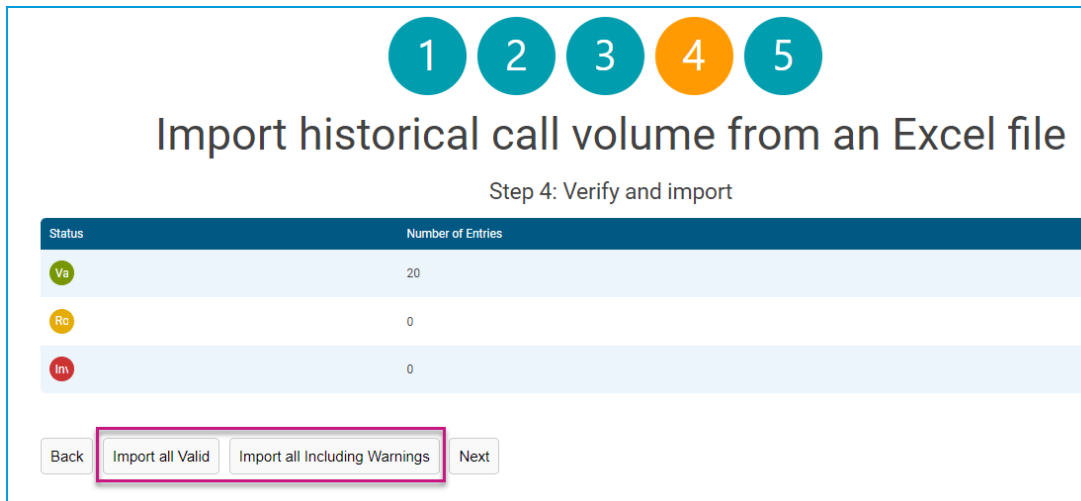
Step 4 Verify and import

Review the table for the total number of—

- Valid rows ready for import
- Rows with warnings ready for import
- Invalid rows that cannot be imported

You may choose to import only the valid rows, or also include the rows with warnings.

Select one import option and it will advance to the next step.



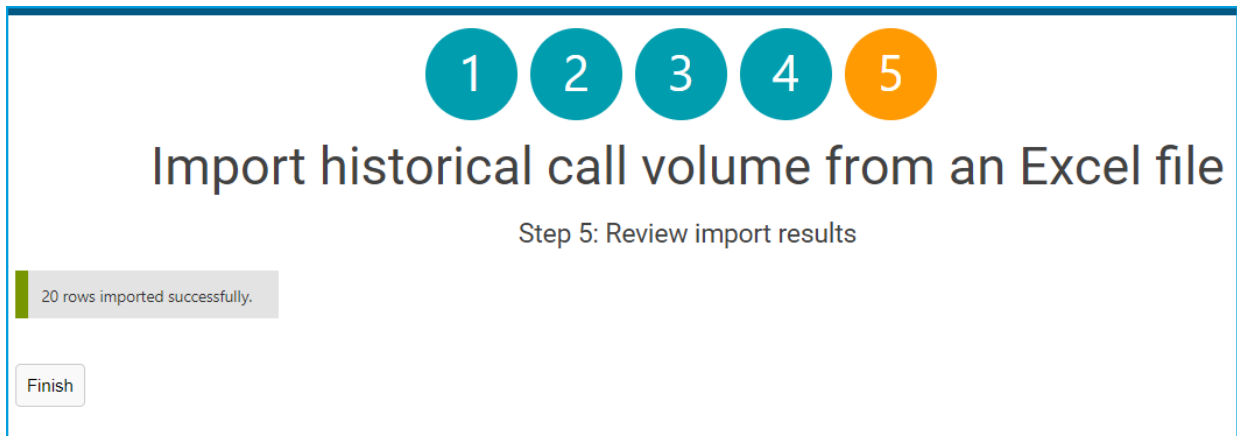
The screenshot shows the 'Import historical call volume from an Excel file' interface at Step 4: Verify and import. At the top, there are five numbered circles (1-5), with circle 4 highlighted in orange. Below the title, a table displays the status of the import process:

Status	Number of Entries
Va	20
Ro	0
Inv	0

At the bottom, there are four buttons: 'Back', 'Import all Valid', 'Import all Including Warnings', and 'Next'. The 'Import all Valid' button is highlighted with a red border.

Step 5: Review import results

View the number of rows imported then click *Finish*.



The screenshot shows the 'Import historical call volume from an Excel file' interface at Step 5: Review import results. At the top, there are five numbered circles (1-5), with circle 5 highlighted in orange. Below the title, a green message box states: '20 rows imported successfully.' At the bottom, there is a single button labeled 'Finish'.

View Imported Data

To view the imported data, select *Run contact volume history reports* in the reports tab and enter the date range. In the Options window make selections then click *Apply options*.

Setup options
Review and adjust the basic properties, connection settings, collection points and device state mappings.


Show the setup options dialog.

Reports
Report and review contact volume and handle time history for this data source or any collection point.


Run contact volume history reports.

Revise
Revise the historical contact volume and handle time for any collection point.


Revise historical volume.

Import
Import historical contact volume history or collection points associated with this data source.


Show the import options dialog.

CONTACT VOLUME BY DATA SOURCE REPORT

Report run for Community Cloud Connect -- All collection points -- starting on 01 Jan 2026 through 02 Jan 2026

Report run time: 28 Oct 2024 10:59 am

[Executive Summary](#)
[Detail](#)
[Total](#)
[Average](#)

CONTACTS OFFERED
276.00

CONTACTS NOT HANDLED
12.00

CONTACTS HANDLED
264.00

AVERAGE HANDLE TIME
17.55

Interval	Contacts Offered	Not Handled	Handled	AHT
01 Jan 12:00 am	15.00	0.00	15.00	12.00
01 Jan 12:15 am	10.00	1.00	9.00	8.00
01 Jan 12:30 am	12.00	2.00	10.00	30.00
01 Jan 12:45 am	14.00	0.00	14.00	14.00
01 Jan 01:00 am	52.00	5.00	47.00	7.00
01 Jan 01:15 am	20.00	0.00	20.00	12.00