



# Feature Highlights in 5.1SP2

Version: July 15, 2024

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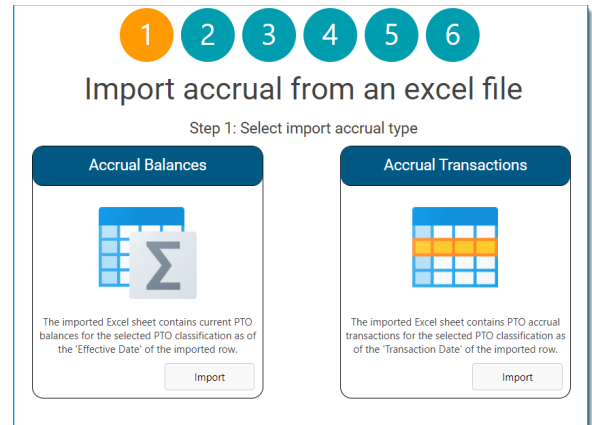
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## Published accrual calendar

### Accrual balance import

In the published accrual calendar, there is now an option to import accrual balances or add additional accrual transactions from an Excel spreadsheet.

When importing an accrual **balance**, the system will automatically calculate the delta (the difference) between existing accrual balances and the values from the spreadsheet. After import, the system will update the agent's accrual with the newly imported balance.



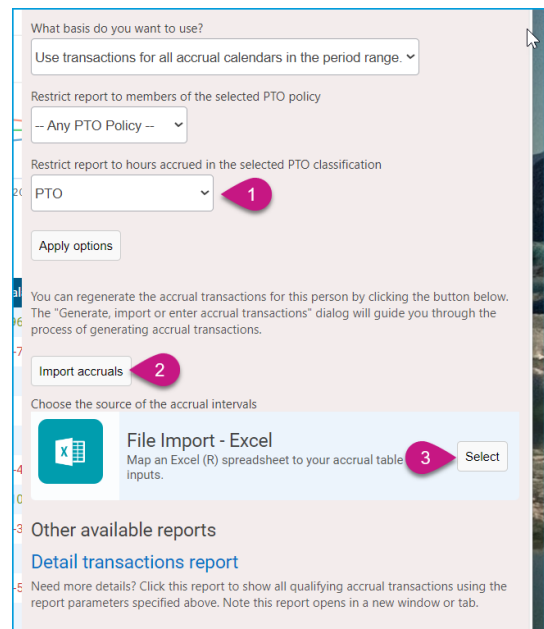
To import balances for a group of agents: Go to Plan > All things time off > PTO Calendars > Published accrual calendar.

Select the classification.

Click *Show options*.

In the options window:

1. Select a classification,
2. select *Import accruals*,
3. click *Select* for File Import - Excel.



[To import balances for a single agent, navigate to the agent profile > Time off settings > select the PTO classification. Click *Show options*. Click *Generate accrual transactions* then click *Select* next to File Import – Excel.]

In the options window select *Import* in the Accrual Balances tile then follow the steps in the Wizard.

## Published accrual period report

Plan > All things time off > PTO Calendars > Published accrual calendar > *select a classification*.  
 The participant summary tab of this report now includes a column for the *Employee ID* and the option to export the data. To export, select the **grid** view (⊙) then click the ☰.

**PUBLISHED ACCRUAL PERIOD REPORT**  
 Including people from **All eligible participants** starting on **01 Jan 2024** through **31 Dec 2024**  
 Report run time: 12 Jul 2024 08:59 am

Monthly Transaction Type & Month Transaction Type PTO Classification PTO Classification 1 Participant summary 2 3

Participant name	Employee ID	Assigned PTO policy	Accrued hours	Scheduled hours	PTO balance
Areheart, Sam	SCA21218	2024 Q1 Full Time	286.00	-32.00	254.00
Azzarito, Deborah	dka21094	Time Off	208.00	-64.00	144.00
Badgett, Gregory	GAB21254	Time Off	112.00	-28.00	84.00
Barton, Jean	JBarton	Time Off	136.00	-8.00	128.00
Bickley, Sharon	SBickley	Time Off	120.00	-16.00	104.00

## Database maintenance

Settings > Application settings > Administrative settings > Services.

There is now an option to separate the back-up utility in the application service, creating the ability run the database health utility without creating a back-up. Set *Backup enabled?* to *No* then *Save*

**Configure service parameters**  
 Run-time settings for **Database Maintenance**

Service enabled?  
 No ▾

Backup enabled?  
 Yes ▾  
 Yes ▾  
 No ▾

Location on the database server or network share (ex. c:\backup or \\servername\sharename)

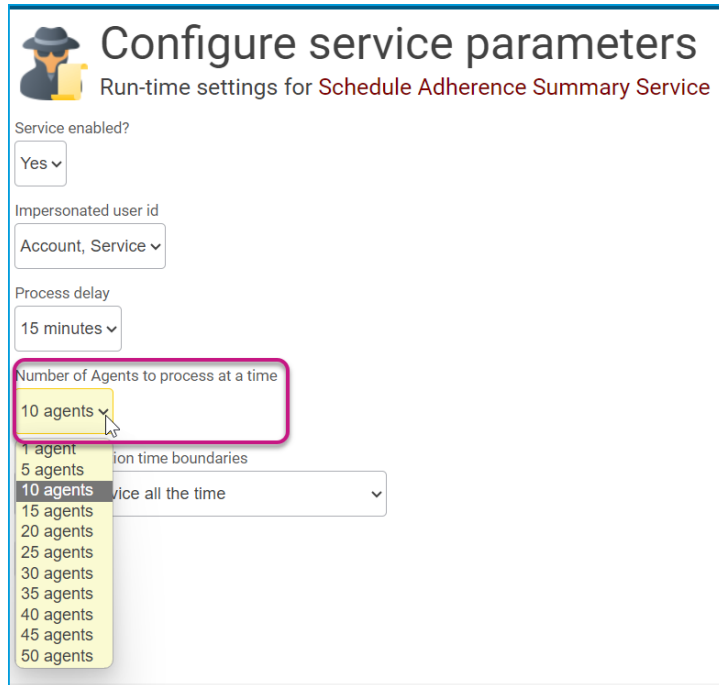
Day of week to run the full backup  
 Monday ▾

Start time  
 1 ▾ : 00 ▾ : AM ▾

Save

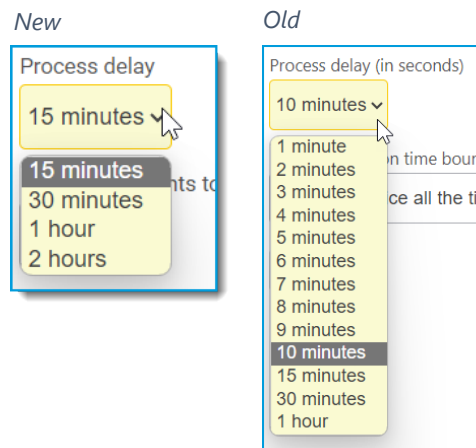
## Schedule adherence summary service

Settings > Application settings > Administrative settings > Services > Schedule Adherence Summary Service. There is a new option to select *Number of agents to process at a time*. This new feature improves the speed, reliability, and scalability of the summary service by controlling the CPU resources. Default is 10.



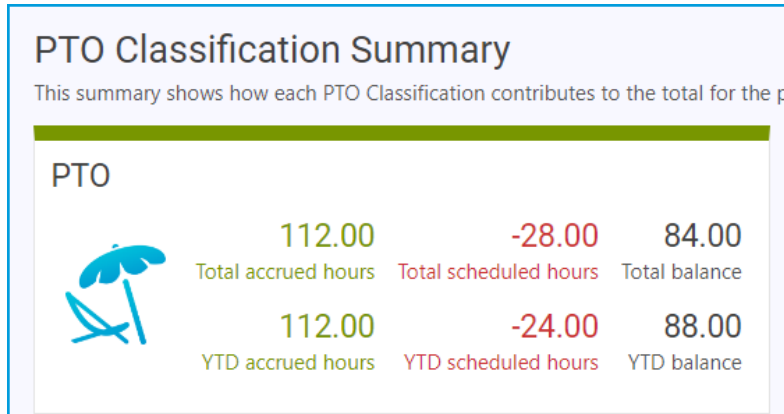
If the service fails, instead of IT having to restart the Windows service an administrator can *Save* the service here and it will restart.

There is also a change in the options for *Process delay*), increasing the minimum time to 15 minutes and adding an option for 2 hours.



## Time off worksheet

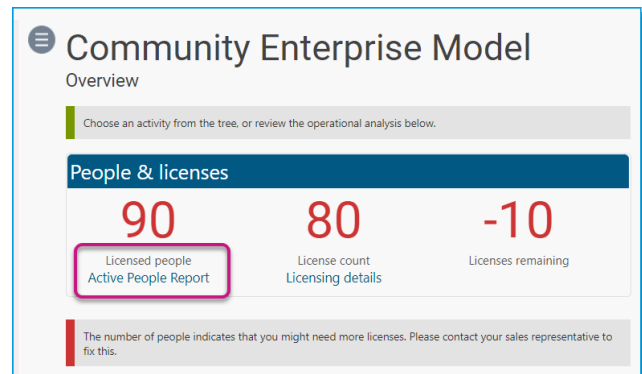
The classification tiles show both the *Total accrued/scheduled hours* and *year to date (YTD) accrued/scheduled hours* instead of just the total accrued/scheduled hours. This will help agents understand their current accrual balance.



## License overage report

Settings > Enterprise model shows a summary of People & Licenses.

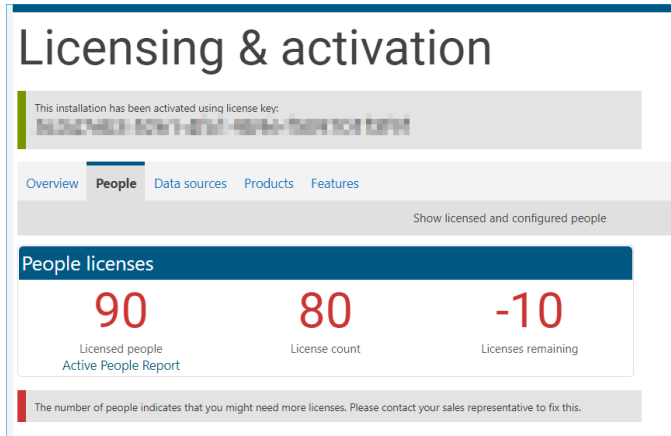
The new *Active People Report* shows all agents contributing to the license count, with those exceeding the license count in red. This report includes the options to *Deactivate* or *Delete* agents.



**ACTIVE PEOPLE REPORT**  
RED = PEOPLE ADDED SINCE LICENSE OVERAGE  
Report run time: 12 Jul 2024 08:07 am

Agent Id	Full Name	Employee Id	Hire Date	Title	Role	Tiebreak	Login Id	Email Address	Supervisor Name		
451	Barton, Jean	JBarton	12 Jun 2017	Sales/Service Rep	Agent	0	jbarton		Blair, Travis	Deactivate	Delete
450	Renfroe, Dave	drenfroe	12 Jun 2017	Sales/Service Rep	Agent	0	drenfroe		Mitchell, Lauren	Deactivate	Delete
449	McBride, Natasha	NNM17965	10 Jul 2016	Sales/Service Rep	Agent	0	nmcbride		Blair, Travis	Deactivate	Delete
440	Pollock, Mitch	MXP21277	15 May 2017	Sales/Service Rep	Agent	0	mpollock		Blair, Travis	Deactivate	Delete
432	Dunbar, Bill	wdunbar	15 May 2017	Sales/Service Rep	Agent	0	bdunbar		Blair, Travis	Deactivate	Delete
429	Turner, Bruce	bturner	15 May 2017	Sales/Service Rep	Agent	0	bturner		Blair, Travis	Deactivate	Delete

This report is also accessible on the Licensing & activation page > People tab.



**Licensing & activation**

This installation has been activated using license key:  
XXXXXXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX

Overview **People** Data sources Products Features

Show licensed and configured people

**People licenses**

<b>90</b> Licensed people <a href="#">Active People Report</a>	<b>80</b> License count	<b>-10</b> Licenses remaining
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The number of people indicates that you might need more licenses. Please contact your sales representative to fix this.