# Homepage [Today] Review

Webinar handout
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CommunityWFM

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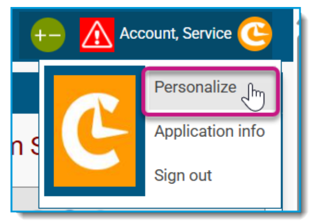
# About this document

This document accompanies the CommunityWFM College webinar *Homepage | Today Review*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

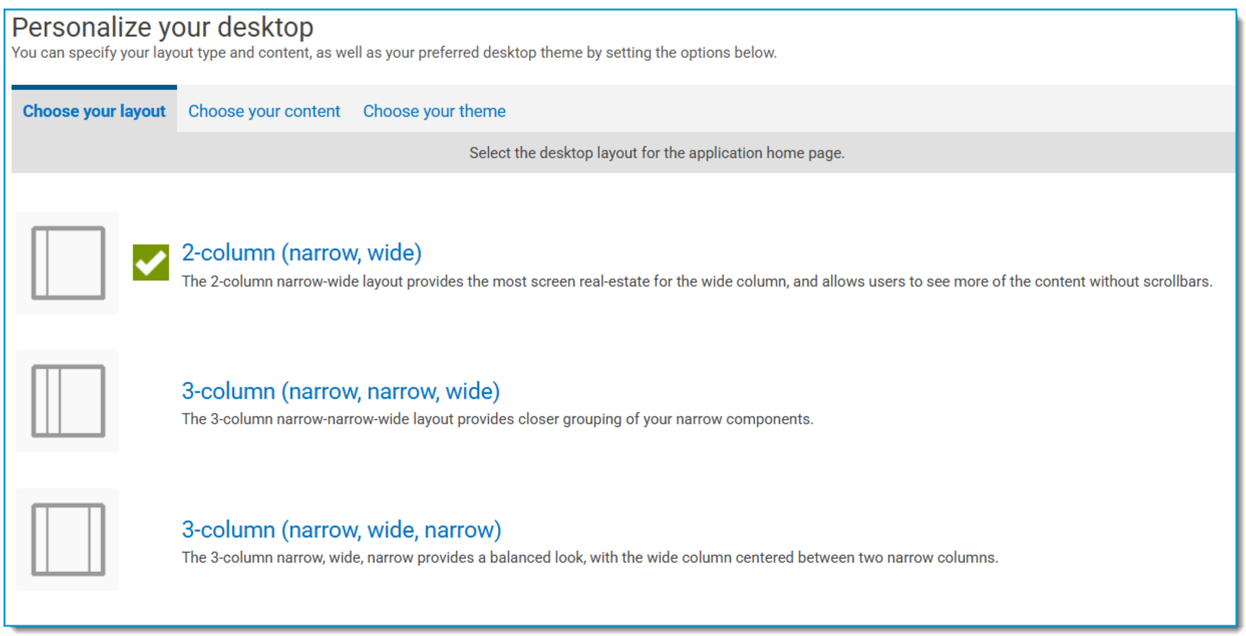
**Note:** Customizing the homepage is available in the Enterprise version of CommunityWFM. The Essentials version does not allow customizing the modules on the homepage.

# Choose your layout



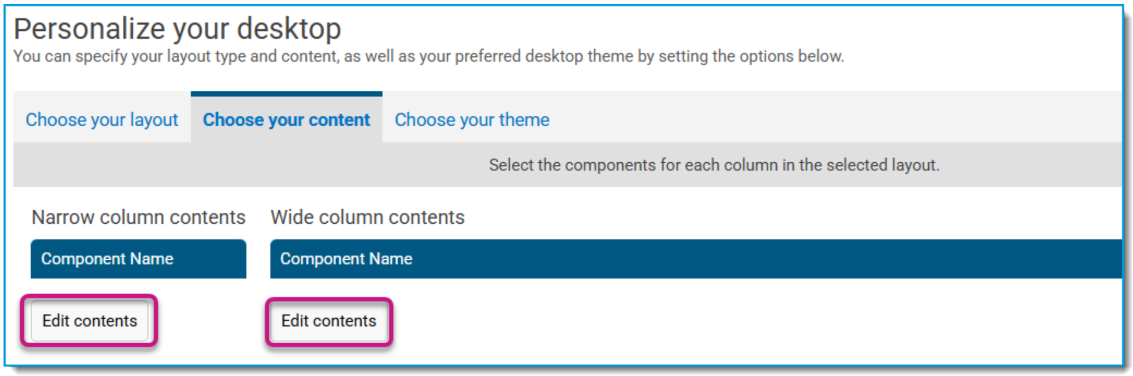

To change the configuration and contents of the homepage, navigate to your name and select *Personalize* from the pop-up.

There are three layout options, each with varying combinations of 'Narrow' and 'Wide' columns.



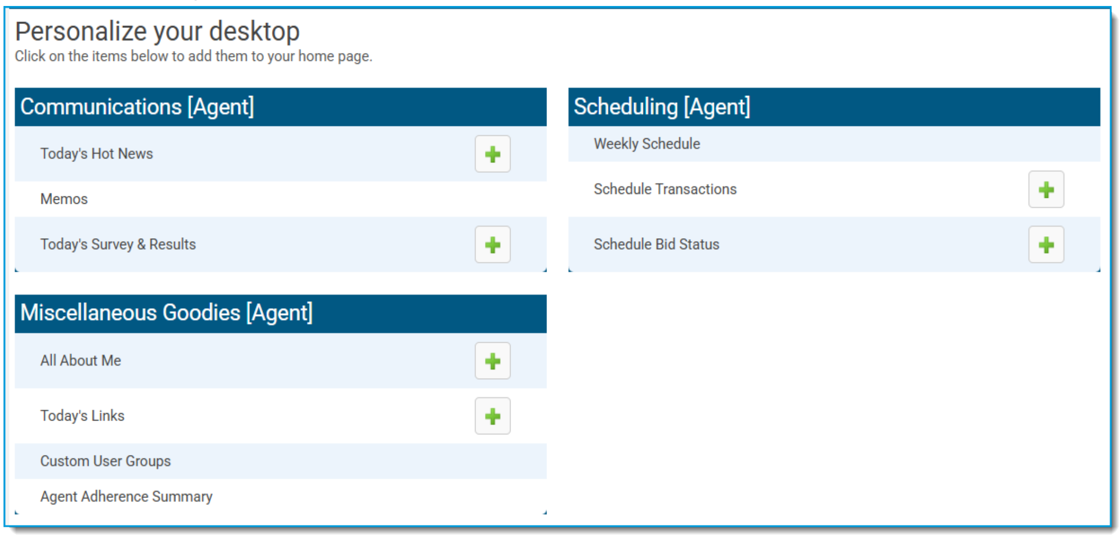

# Choose your content

This tab opens with your selected layout. Click *Edit contents* in each column to open a new tab where you can add components. The component options are role specific.

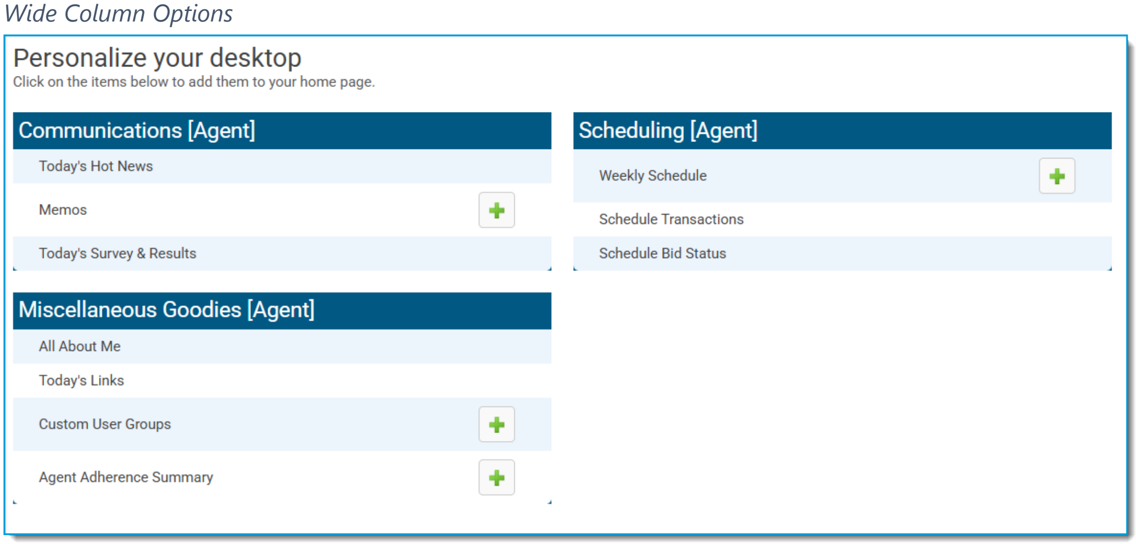



Items with a green + are available to add to the column. Agent specific components are shown here.

*Narrow Column Options*




*Wide Column Options*

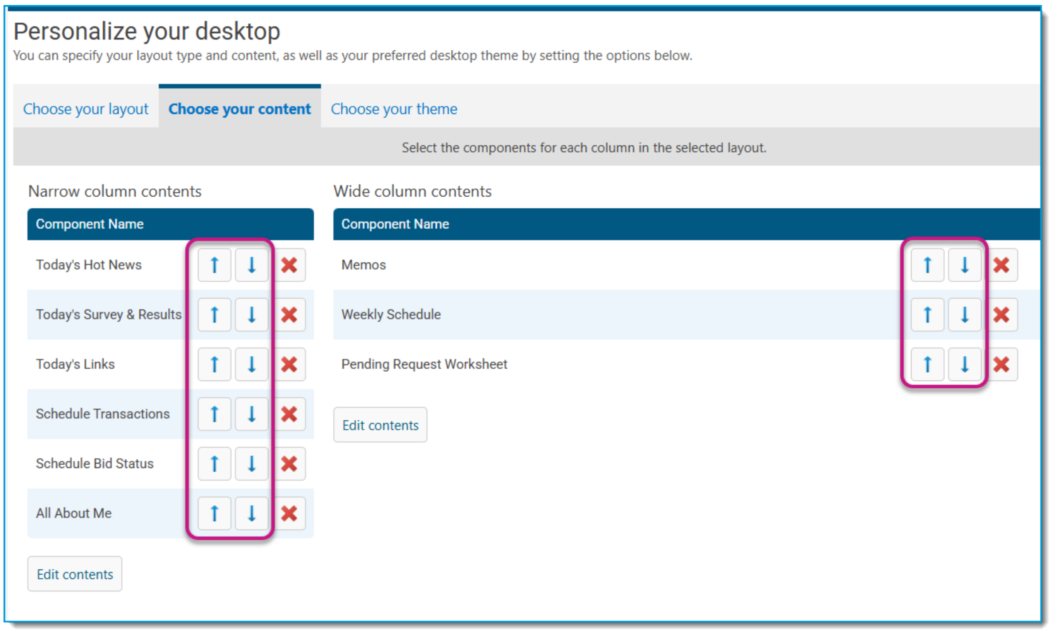


The modules will be added top to bottom in the order clicked.

After making your selections, close the browser tab then refresh the page to see your selections.

## Adjust order of modules

To change the order of the components in each column, navigate to the *Choose your content* tab. Click the blue up or down arrow to change the order. You can also remove components by clicking the red X.




## Narrow Column Options

### Today’s Hot News

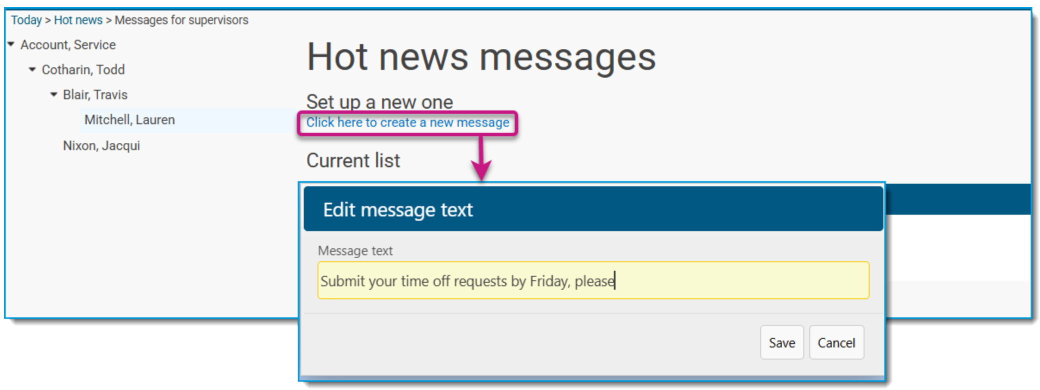

This is a ticker for message(s) that scroll across the component window.

- Can have multiple messages.
- Can be configured to send to a level of the Enterprise Model, or to a specific supervisor group or custom user group.
- Adding/deleting available in the mobile app, but not editing.

Placing your mouse pointer on the scrolling message will pause the scrolling.

STEP-BY-STEP

1. In the Today's Hot News banner, click the pencil (edit) icon.
2. Select the group who will see the message.
3. Select *Click here to create a new message*.
4. Type your message text and *Save*.
5. Return to the homepage to view the new scrolling message in Today's Hot News.
6. **Reminder:** people must be viewing their homepage to see the scrolling message.



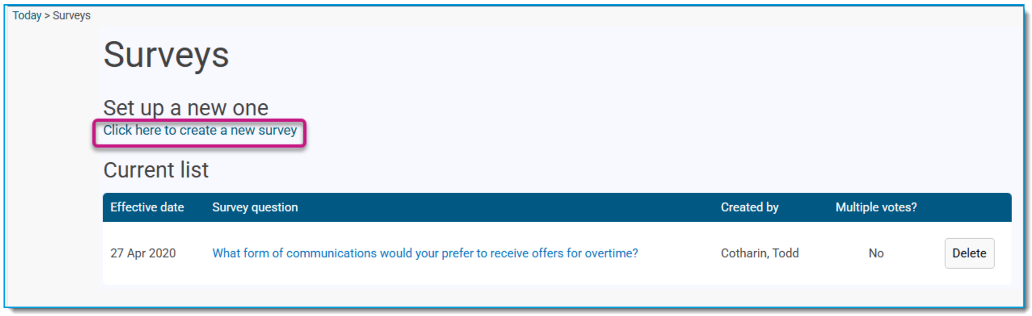

## Today's Survey & Results

- Create a survey and allow people to vote on it.
- It's not deployable like Today's Hot News. **Everybody in the system can see it.**
- Set up can be either one vote per respondent or multiple votes.
    - For example, create a survey like "What type of call did you just finish?" and use multiple votes per person to get a sense of the call behaviors for the day.
- **Responses are anonymous.** You can see how many votes for each answer, but you cannot see who voted for which answer.
- To see more results of a survey: click on *edit* then the survey name to open a results window.

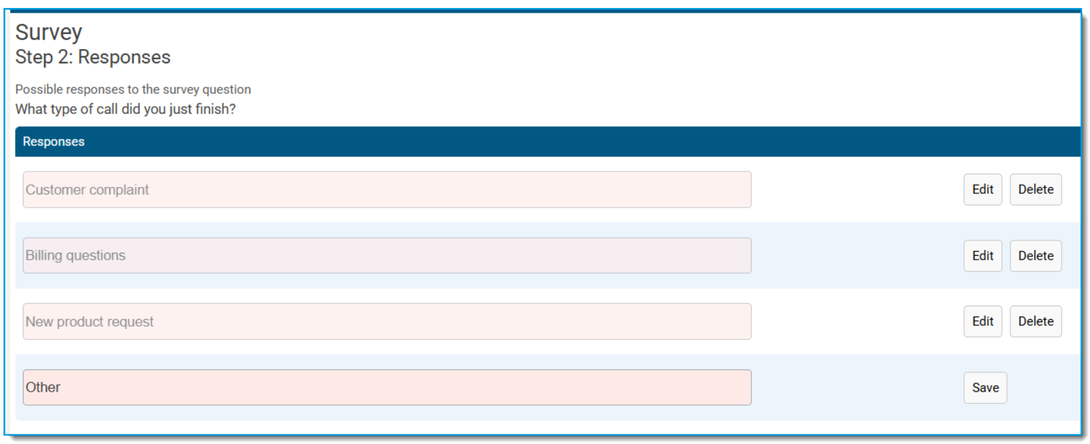
STEP-BY-STEP

1. In the Today's Survey & Results, click the pencil (edit) icon.

2. Select *Click here to create a new survey.*

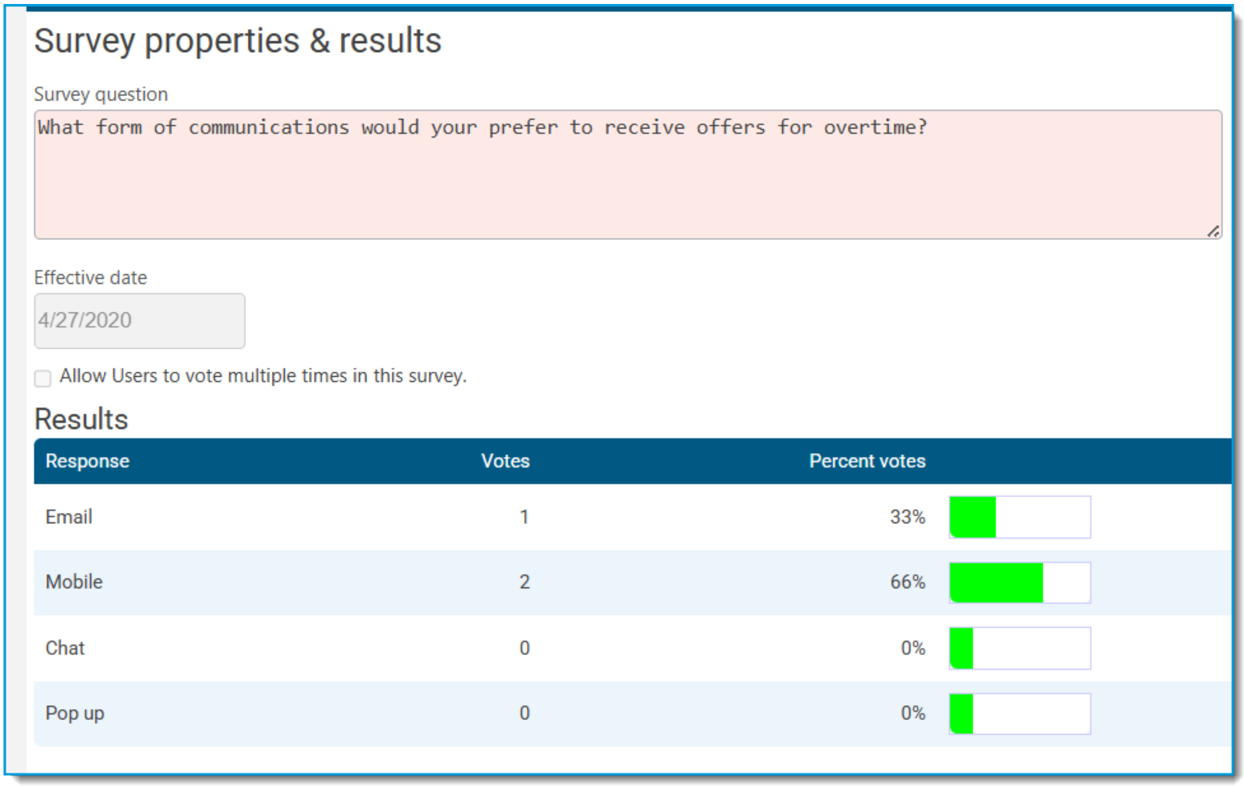



3. Type your **survey question**. Best practice is to keep it short and specific. Once deployed, you cannot edit the survey question.
4. **Effective date:** You can select a future date to deploy the survey.
5. **Allow users to vote multiple times in this survey.** Leave unchecked if this survey is one vote per person.
6. Click *Next.*
7. Enter the possible survey responses, clicking *Save* after each one. Once deployed, you cannot edit the survey responses.




**Note: There is no Save or Finish button.** After adding the response options, close this window to return to the list of surveys and refresh the page.

To view survey results, navigate to the list of surveys and click the survey question (name) to open a new window with the results.



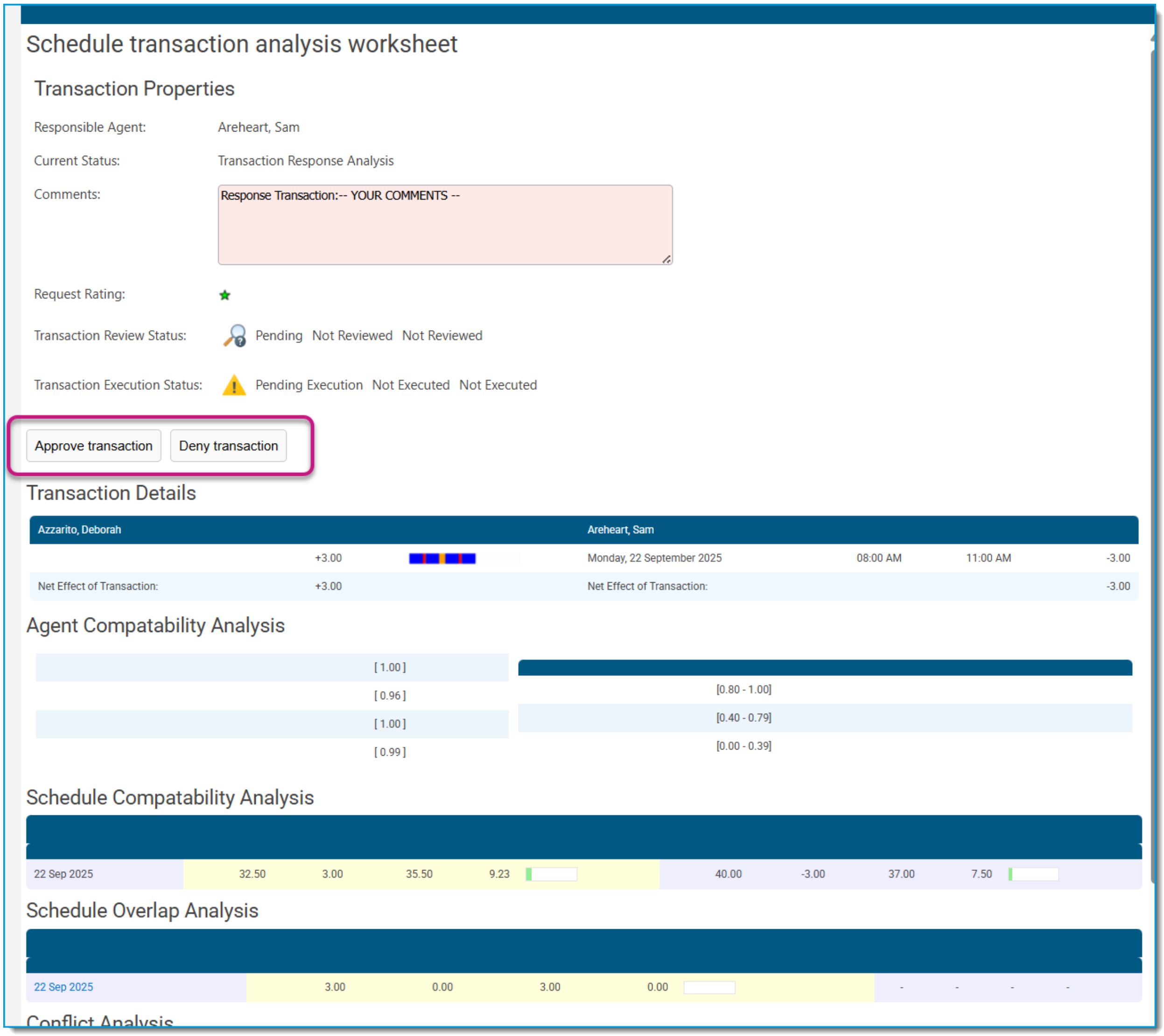

**Note:** Only one survey can be in effect at any given time. You can view past surveys results in the editing window, but the survey will not be active.

## Schedule Transactions

Do you allow your agents to swap schedules? If so—

- Think of *My Schedule Transactions* as a virtual corkboard in the breakroom.
- They may already know who they are trading with and can put it in the description.
- Or they can post the schedule they want to swap — their current scheduled hours.

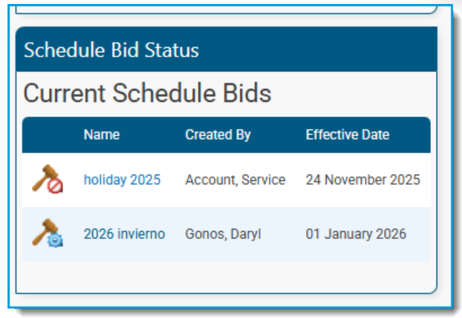
- For example: 3 agents want to trade. The supervisors will be able to see and approve the trade that is the most compatible. Compatible = close enough hire date, takes the same types of calls, and will not put them into overtime. If any agents have something they should not trade (such as a meeting or training), the system will flag that for you. You just click approve or deny the swap.




**Note:** Schedule transactions MUST have 2 or more agents involved. This is not a system for an agent to simply release their scheduled hours.

## Schedule Bid Status

- If involved in a schedule bid, this is where agents will go to make their bid selections.
- A gavel icon shows the status of each bid the agent is a part of.
- Click on the name to open the Schedule Bid worksheet.

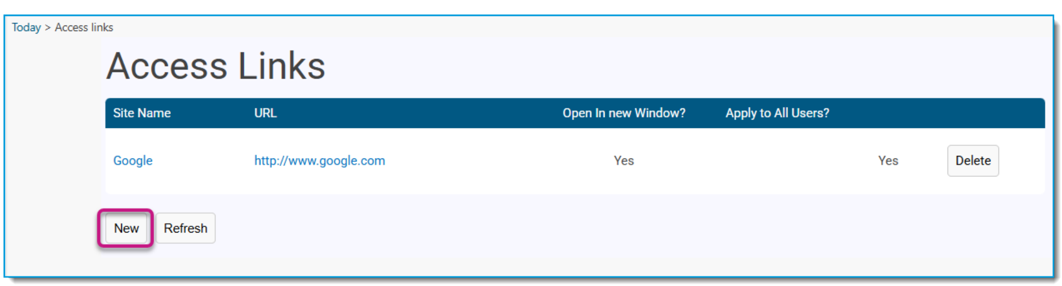



## Today's Links

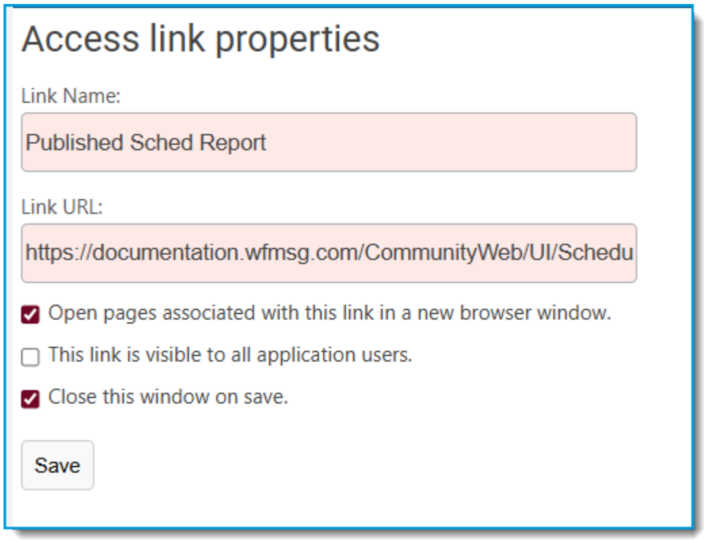
- This is a dashboard that houses links to other programs or websites.
- Any frequently used URL can be added here.
- If there are reports that you know you'll be running on a regular basis, you can link them here for quicker access.
- These links are deployable: you can check a box to make them "visible to all users." **Do you want agents to have access to modifying the links**? If they create a link and check that box, it will be seen in **everyone's** Today's Link module. Also, if they delete a link, it deletes the link for everyone! If we turn off their access, they will still be able to use the links, but they won't be able to create or delete them. **Turning off the access requires a Support Representative making the change in the server to the role allowed to edit Today's Links.**

STEP-BY-STEP

1. In the Today's Links, click the pencil (edit) icon.
2. Click *New* to add a new link.



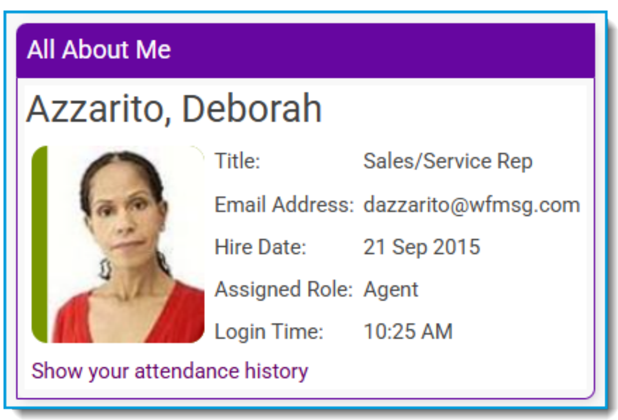
3. Add a name for your link, then add the link's URL. This URL can be copy/pasted from any report/screen in CommunityWFM for quick access.




4. Select whether to open the link in a new window, and whether the link should be visible to all users. You may also check a box to close the dialog window after saving.

## All About Me

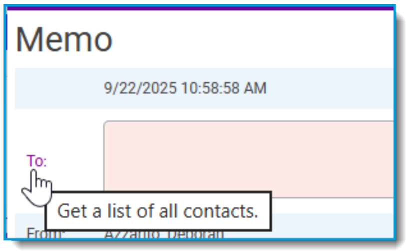
Includes profile picture, title, email address, hire date, assigned role, and most recent login time. Agents have a link to view their attendance history.



# Wide Column

## Memos

- A communication method that resembles email, but it exists strictly within CommunityWFM.
- If you type an email address in the To: field, nothing will happen. You have to click *To* and it will open a list of users in the system to choose from.




- You can create your own contact lists.
- **This is intended for automated communications,** but you can send memos and receive answers in this module.
- When an agent asks for time off or makes changes to an existing request, their supervisor tree will automatically get a memo. The system creates it to notify the supervisor that the agent asked for time off or made changes to a request.
- If notifications are enabled (manual selection when running a published schedule report), any change to an agent's published schedule will trigger a memo to the agent that their schedule just changed.
- You can create folders to organize memos (like in other email systems).

**Reminder:** There is no "sent" folder. Do not send messages through this system that are HR-related or for which you need documentation.

## Weekly Schedule

- View of the Weekly schedule is role dependent.
  - Agents see their schedule starting with today and continuing for the next 6 days of the **published** schedule. Agents can select future weeks using the *Show options* panel and entering a date range to view their own or (if allowed) their supervisor group schedules.
  - Manager and supervisor roles see schedules for all of the assigned agents in their reporting tree.

- It shows everyone who reports to you, based on the reporting tree set up in the Organization Model. Admins typically see all agents; supervisors typically see the agents that report to them; and agents only see their own schedule.
- You can select a different report date from the dropdown, use *Show options* to select a different date range, or use the Event type legend to spotlight different events on the schedule.

## Custom User Groups

Shows a list of Custom User Groups that you belong to.

## Agent Adherence Summary

Agents can view at a glance their daily (yesterday – if scheduled), weekly (this week's schedule), and monthly (first of month through today) schedule adherence statistics.

## Pending Request Worksheet

- Default date range is 90 days (not customizable). Date range can be changed when running the report.
- This is only for **pending** time off/availability requests and once you approve or deny a request, it is removed from this component.
- If there are rules for requests (e.g., minimum request interval, brownout dates, only a certain number of agents off on any given day), the requests appear here only if they pass those rules.
- When an agent asks for time off, if not auto-approved or auto-denied, it comes into the system as pending and shows up here where you can review them. While you can approve or deny them here, it's best practice to approve or deny requests in Event Detail Report where you can see additional information such as already approved/denied time off requests.

# Schedule Adherence Monitor and Automated Schedule Attendance Monitor

These go hand in hand.

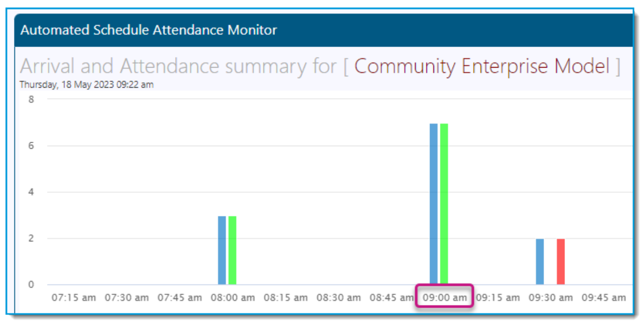
*Schedule Adherence Monitor*

There is an option at the top of the pie charts: tabs to quickly toggle between *Adherence Events, Schedule Events,* and *Device States.* Below the pie chart is a legend that expands with a drop-down arrow if there are more than two pieces of pie.

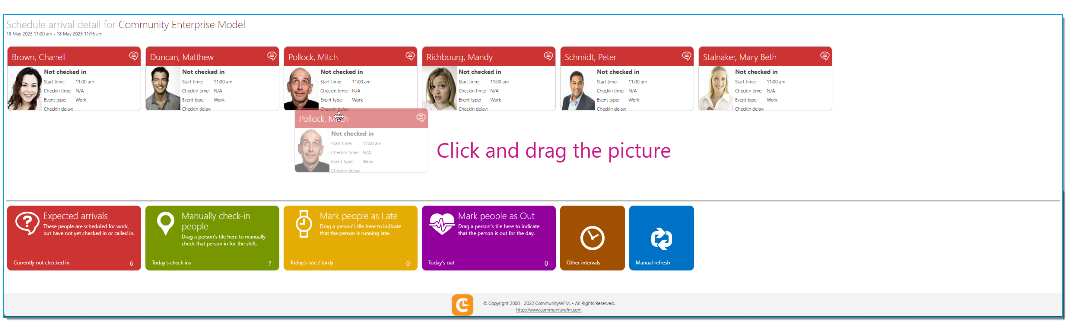
- You get to decide what teams or groups you want to see.
- You can have it show you a list of **who** is out of adherence, or as a pie chart to show you **how many** are out of adherence.

*Automated Schedule Attendance Monitor*

- You can drill down to 15-minute increments to show you how many agents you have scheduled to check in, how many have checked in, and how many have not checked in and may be marked as Late.
- Click on any time in the graph to open the *Schedule arrival detail* page for that interval.




- Click and drag the agent's tile to the appropriate box (e.g., Late, Manual, Out sick).



- See a summary of people you have manually checked in by clicking the *Manual* tile; how many have self-checked in; how many have a soft check in (which means they were scheduled to be in queue on the phone and the system saw they were logged in and were indeed in queue); how many are late; and how many have been marked out sick (either manually or via the Mobile App).
- You can view the summary throughout the day.