



CommunityWFM
A RingCentral company

Summary Reports

Webinar handout
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About this document

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

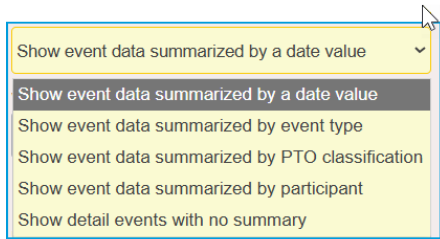
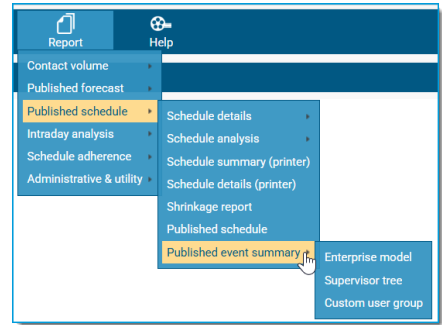
This webinar will cover the three most popular summary reports:

- Published event summary
- Schedule adherence summary
- Shrinkage summary

Published event summary

Report > Published schedule > Published event summary > [Enterprise model | Supervisor group | Custom user group].

The published event summary report includes a wealth of information with many filtering options. If selecting a date range of fewer than 90 days, details are available. When sorted for details, this is where you can approve, deny, revalidate, or remove time off requests. Event type filters allow selecting specific event types or restricting to PTO events.



Hide options

General report criteria

Filter participants by this Activity
 Organization Name

Report from date
 12/12/2025

Report through date
 1/12/2026

The event details option is only available if the date range is fewer than 90 days.

Reported summary data

Report type selection
 Show event data summarized by a date value

What type of date value do you want to summarize?
 Summarize by date

Event type filters

Restrict to a specific event type
 -- No Selection --

Restrict report to events that occur **off site** (At-Work flag is false).

Restrict report to events that occur **not in queue** (In-Queue flag is false).

Restrict report to events that occur **require supervisor approval**.

Extra filters

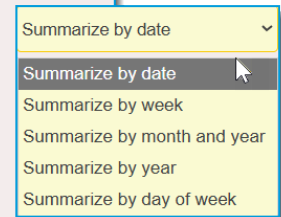
Review status
 -- Do not restrict by review status id --

Participant active / inactive filter
 Do not consider that employment status

Note that filtering by active participants will make report generation run longer.

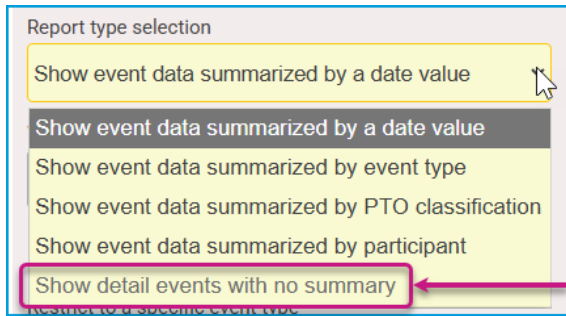
Time zone selection
 Use my default time zone

Apply options



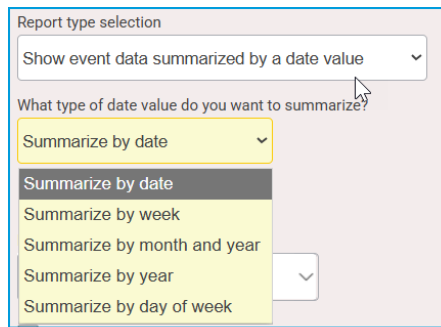
Reported summary data

The *Options* panel allows filtering the report type by date, event type, PTO classification, participant, or showing all. Depending on the selection, you may further refine the report.

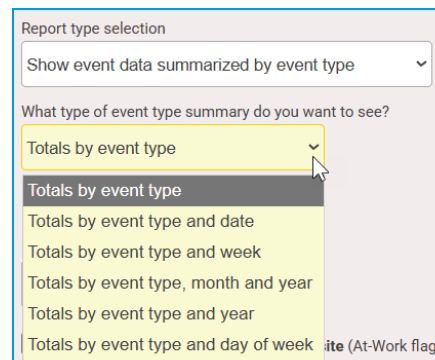


Only available if date range is fewer than 90 days.

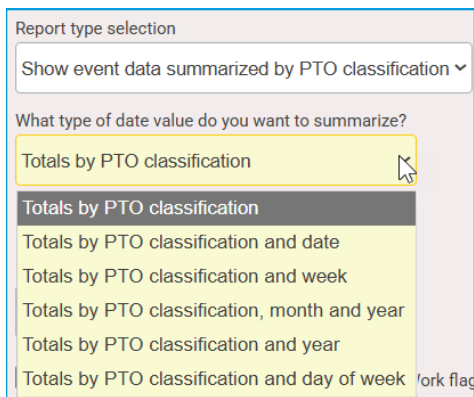
Summarize by date



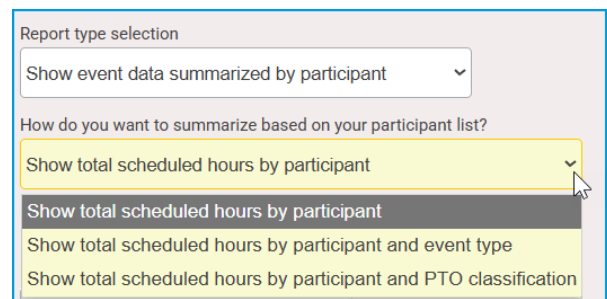
Summarize by event type



Summarize by PTO classification



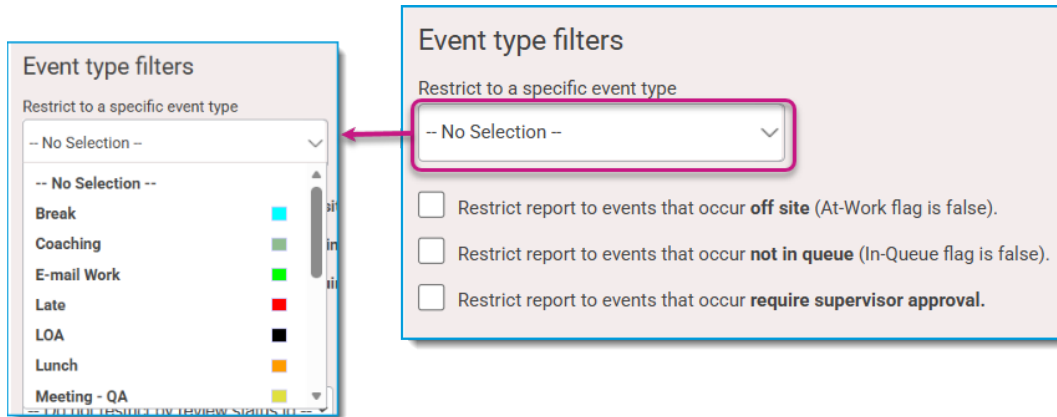
Summarize by participant



Event type filters

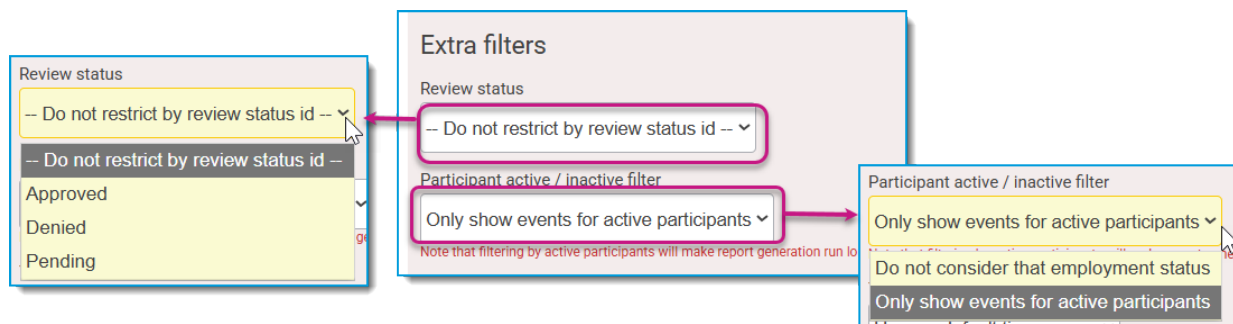
This filter allows selecting a specific event type, for example, all late events, or all coaching events.

Or use the checkboxes to select all events that are off site (not a work event), not in queue (e.g., meetings), or require supervisor approval (e.g., PTO). These are designated in the event type settings.



Extra filters

Filter by review status (approved, denied, pending), and whether to include only active participants in the report.



Use cases for the Published event summary

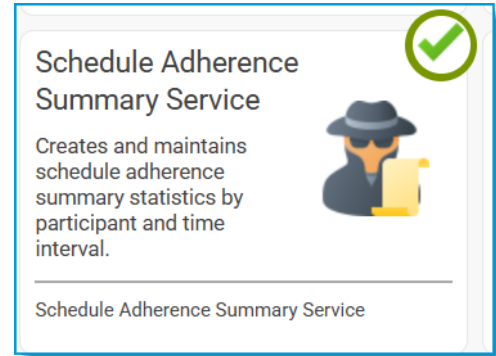
- Review and approve/deny all pending PTO requests.
- Report how much time was spent on coaching or training in the past quarter.
- Provide the cost of all PTO last year. This report includes a column for total cost, calculated using the average wage as designated in the Enterprise Model site properties.

Schedule adherence summary

This report matches what agents see in their adherence summary report.

Set up

Ensure the service is enabled: Settings > Application settings > Administrative settings > Services and configured.

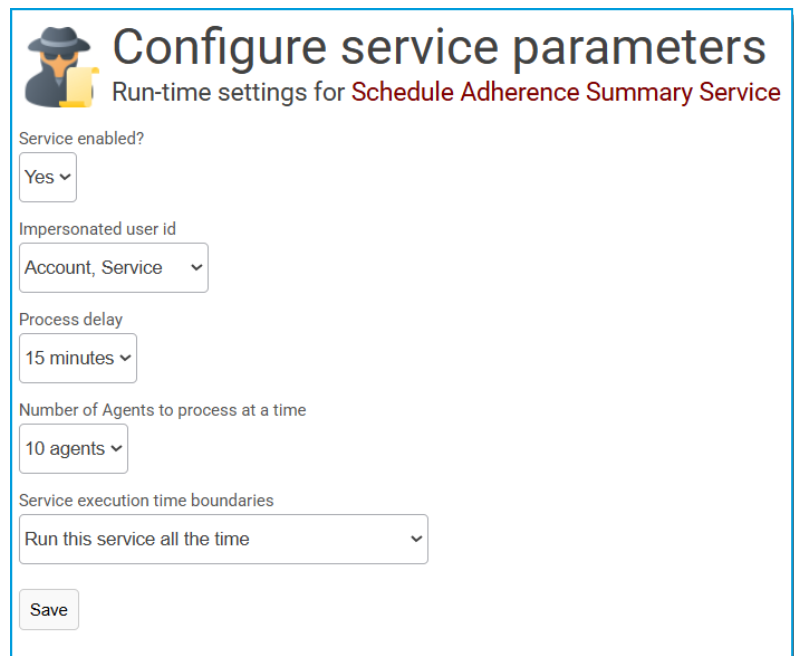


Service enabled? Select *Yes* to turn on the service.

Impersonated user id: Best practice is to set this to the service account to know that the system performed any updates.

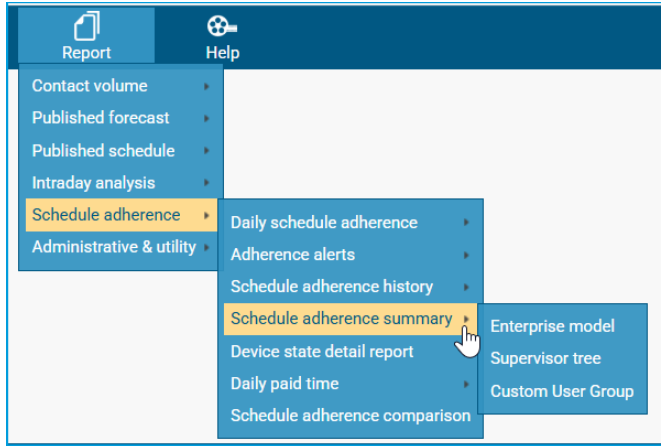
Process delay: Select from 1–10 minutes, 15 or 30 minutes, or 1 hour.

Service execution time boundaries: Default is to *Run this service all the time* or you can specify start and end times to run the service.



Run the report

Report > Schedule adherence > Schedule adherence summary > [Enterprise model | Supervisor group | Custom user group]



In the options panel, select an activity, date range, and if applicable a data source.

Click *Apply options* to run the report.

This summary data has filters for executive summary and a variety of date ranges. View by individual agent or even by day of week to identify patterns.



Date, week, month and year include options to view adherence hours or adherence percentage.

Day of week includes option for total in a bar graph or average in a pie chart.

Participant has option to view as tiles for each agent or in a table.




Participant	Scheduled Hours	In Adherence	Out of Adherence	In Adherence %
ADFCA715-A461, 3A4D3853-...	51.00	39.97	11.03	78.37
Areheart, Sam	62.20	56.43	5.77	90.73
Azzarito, Deborah	57.60	40.90	16.70	71.01



Participant name	Total Hours	In Adherence Hours	Out of Adherence Hours	Adherence Percentages
ADFCA715-A461, 3A4D3853-C172	51.00	39.97	11.03	78.37
Areheart, Sam	62.20	56.43	5.77	90.73
Azzarito, Deborah	57.60	40.90	16.70	71.01
Badgett, Gregory	83.95	76.82	7.13	91.50
Barton, Jean	72.50	64.40	8.10	88.83

Use cases for Adherence summary report

- Identify and coach agents who have increasing out of adherence time.
- Determine need to account for additional shrinkage if adherence goals not met.
- Determine goals for company adherence bonus structure.

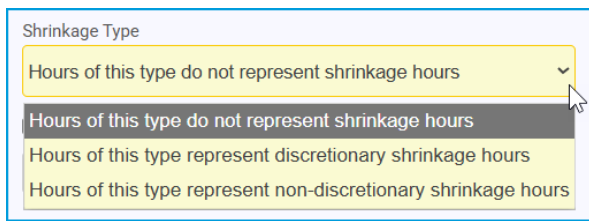
Shrinkage summary report

Report > Published schedule > Shrinkage report.

Use the published schedule shrinkage report to analyze, forecast with, and report on discretionary and non-discretionary shrinkage. Shows a summary of shrinkage data for a selected date range. Options include date charts, interval charts, day charts, or day of the week charts, then use the filters to refine the report to show shrinkage percentage or hours.

Set up

For accuracy, each event type must have a shrinkage designation: Discretionary, non-discretionary, or not shrinkage. This is found in the event type properties.



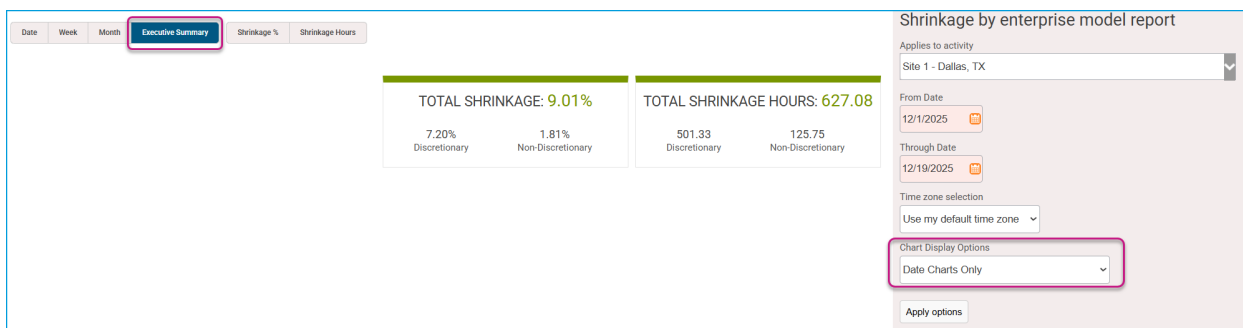
Run the report

In the options panel, select an activity, date range, and display type.

Click *Apply options* to run the report.

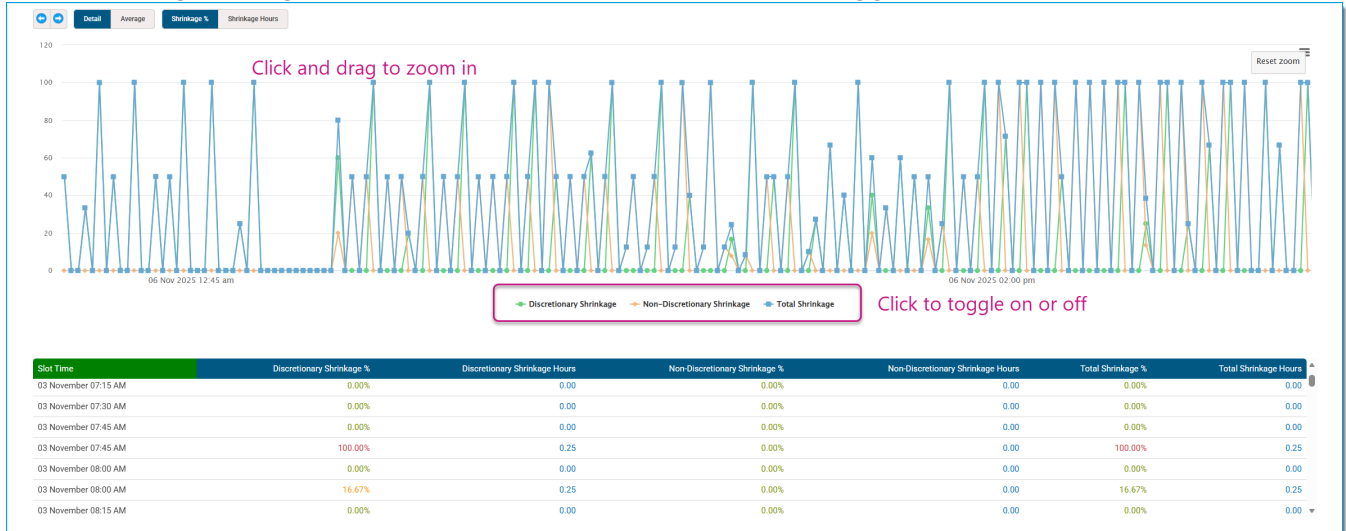
After running the report you can toggle through the different display options.

Date Charts Only includes an Executive Summary with total shrinkage percent and total shrinkage hours.



Interval Charts Only includes a graph with shrinkage designation and a table with the breakdown for each interval. View by detail or average, and by percent or total hours.

Click and drag in the graph to zoom in; click the data names to toggle on or off.



Use cases for shrinkage report

- Compare actual to forecast shrinkage to improve forecast.
- Determine patterns for where in the schedule shrinkage is occurring.
- Identify timeframes of shrinkage to use in forecasting (similar to using historical volumes).

Other summary reports

Schedule analysis

Report > Published schedule > Schedule analysis

- **Full service metric summary:** View details for the week and totals for the individual days.
- **Compact service metric summary:** View totals for the week and each day. Report options include a checkbox to view by leaf node activity.

Schedule summary (printer)

Returns a summary of schedules for the schedule week in a printer-friendly format. Includes the option to include off-site events. The report opens in a new browser window – ready for printing or exporting to .csv or .xlsx.

Schedule adherence summary

Another way of viewing schedule adherence history. This summary data has filters for executive summary and a variety of date ranges. View by individual agent or even by day of week to see patterns.