



# All About Reports

Webinar Handout  
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## About this Document

This document accompanies the CommunityWFM College webinar *All About Reports*. It includes additional details about the reports discussed during the webinar and examples of additional reports available in the system.

This document includes an overview of the standard historical, forecast, and daily reports available in the 5.0 version of CommunityWFM. Please note that many reports have multiple viewing options as well as selectable and filtering criteria. The total number of reports available is many times greater than the reports reviewed in this document.

Many reports have multiple levels, from an executive summary down to the daily details, all easily accessible with filters on the page. Additionally, reports may be exported to a .csv or .xlsx file for additional manipulation.

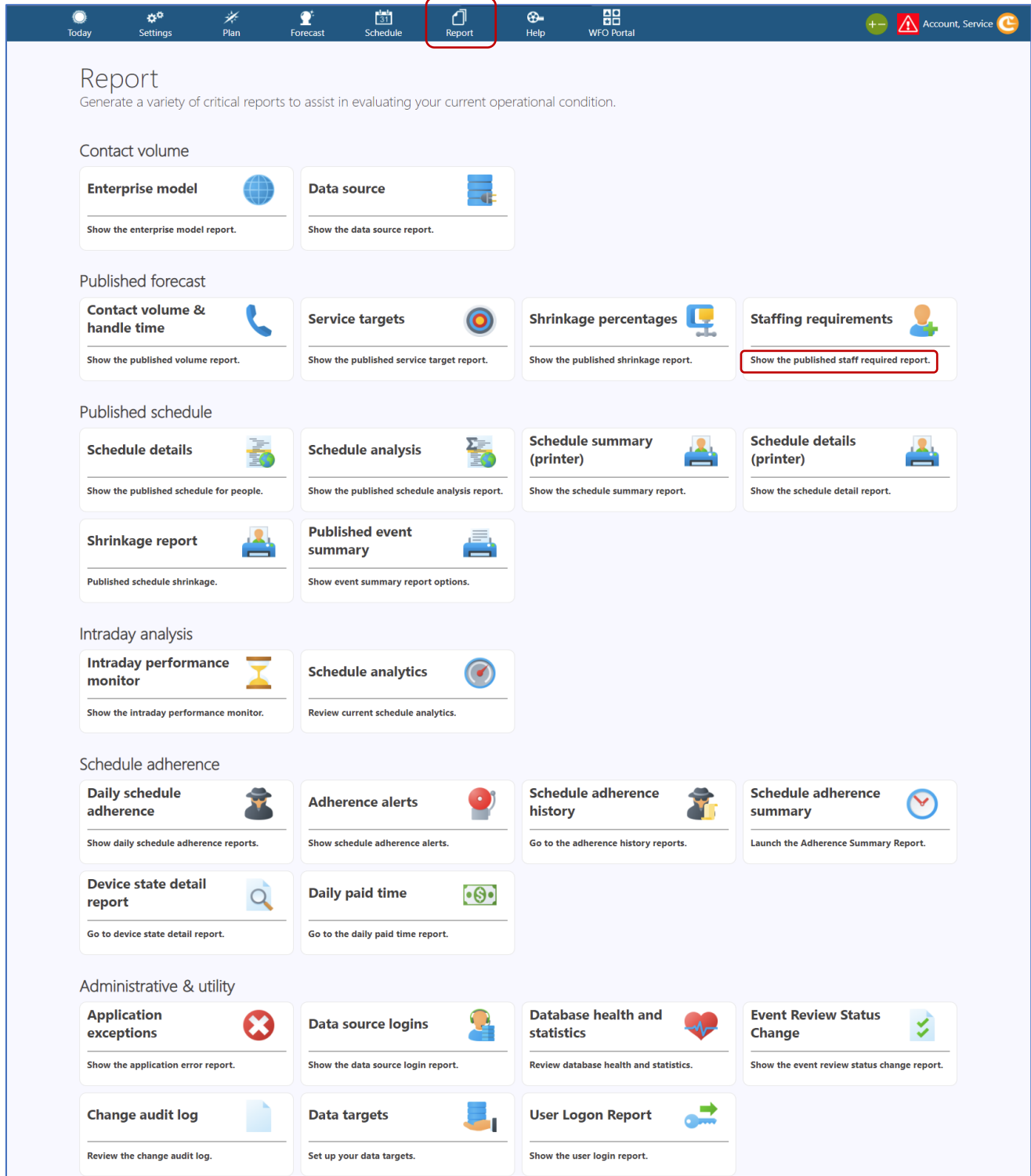
**Data Targets**, an optional module, allows customizing and scheduling reports for export to reporting repositories or 3<sup>rd</sup> party solutions such as payroll. Contact your CommunityWFM project manager for more information about data targets.

We start with an overview of the primary categories of reports, then dive deeper into the options.



## Overview of Reports Tab

Access many frequently used reports from a central location—the Reports tab. You can run the same reports from the work areas. For example, run a published forecast staffing requirements report from here, or from Forecast > Published forecast > Generate forecast reports.



**Report**  
Generate a variety of critical reports to assist in evaluating your current operational condition.

**Contact volume**

- Enterprise model** (Globe icon): Show the enterprise model report.
- Data source** (Database icon): Show the data source report.

**Published forecast**

- Contact volume & handle time** (Phone icon): Show the published volume report.
- Service targets** (Target icon): Show the published service target report.
- Shrinkage percentages** (Monitor icon): Show the published shrinkage report.
- Staffing requirements** (Person icon): Show the published staff required report.

**Published schedule**

- Schedule details** (Calendar icon): Show the published schedule for people.
- Schedule analysis** (Chart icon): Show the published schedule analysis report.
- Schedule summary (printer)** (Printer icon): Show the schedule summary report.
- Schedule details (printer)** (Printer icon): Show the schedule detail report.
- Shrinkage report** (Printer icon): Published schedule shrinkage.
- Published event summary** (Printer icon): Show event summary report options.

**Intraday analysis**

- Intraday performance monitor** (Hourglass icon): Show the intraday performance monitor.
- Schedule analytics** (Target icon): Review current schedule analytics.

**Schedule adherence**

- Daily schedule adherence** (Person icon): Show daily schedule adherence reports.
- Adherence alerts** (Alert icon): Show schedule adherence alerts.
- Schedule adherence history** (Person icon): Go to the adherence history reports.
- Schedule adherence summary** (Clock icon): Launch the Adherence Summary Report.
- Device state detail report** (Magnifying glass icon): Go to device state detail report.
- Daily paid time** (Dollar sign icon): Go to the daily paid time report.

**Administrative & utility**





- Application exceptions** (Red X icon): Show the application error report.
- Data source logins** (Person icon): Show the data source login report.
- Database health and statistics** (Heart icon): Review database health and statistics.
- Event Review Status Change** (Checkmark icon): Show the event review status change report.
- Change audit log** (Document icon): Review the change audit log.
- Data targets** (Target icon): Set up your data targets.
- User Logon Report** (Key icon): Show the user login report.



## Overview of Forecast Reports

**Report options**

Select from the following options to run a report for the selected date range.

- 
**Contact volume**  
 Defines the number of contacts and the average handling time per contact for a single forecast interval.
- 
**Service targets**  
 Defines the target service metric type (for example, service level or ASA) as well as the parameters for forecast intervals.
- 
**Shrinkage percentages**  
 Defines the discretionary and non-discretionary shrinkage values, expressed as a percentage of FTEs, for a given forecast interval.
- 
**Staffing requirements**  
 Defines the number of agents required to satisfy the contact volume to achieve the specified service objective for a given forecast interval.

### Contact Volume options

#### Total Forecast Contacts by—

- Date
- Interval
- Day of Week
- Week
- Month
- Activity Type
- Media Type

#### Average Forecast Contacts by—

- Interval
- Day of Week
- Month

### Service Target options

- Average Speed to Answer
- Deferred Service Level
- Service Level

### Shrinkage Percentages

- Date
- Interval
- Day of Week
- Week
- Forecast Month
- Month
- Activity Type
- Media Type

### Staffing Requirements

- Date
- Week
- Month (Total)
- Month (Average)



## Overview of Intraday analysis

### Intraday analysis

Generate intra-day performance reports.

#### Intraday performance monitor

Show today's past performance and projections for the remainder of the day.

[Show the intraday performance monitor.](#)

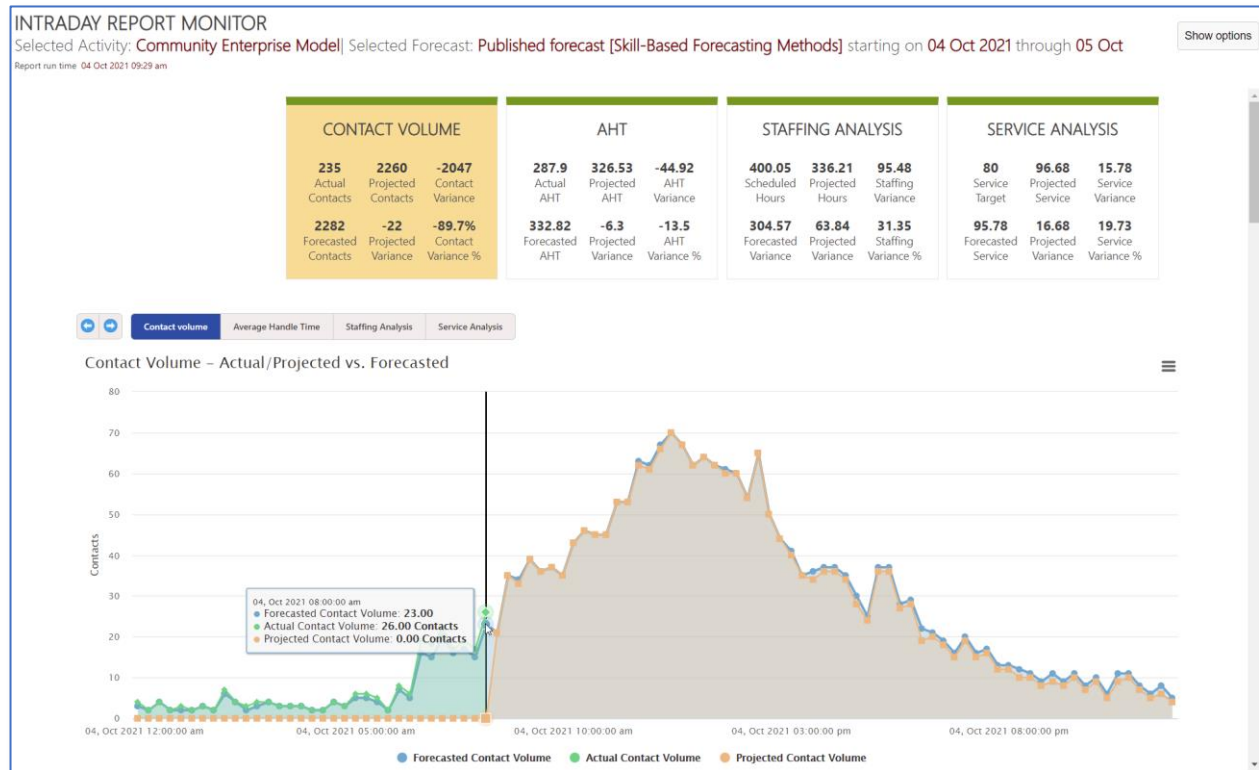
#### Schedule analytics

Review key performance metrics from the published schedule.

[Review current schedule analytics.](#)

## Intraday performance monitor

View today's forecasted/actual/projected contact volume, AHT, staffing analysis, and service analysis.





## Schedule analytics

View analysis based on current, hourly, today, tomorrow, and this week projections.

### Schedule analytics

Current   Hourly   **Today**   Tomorrow   This week
Options

Key performance metrics for today up until the current time interval

**Forecasted daily summary for Community Enterprise Model**  
 Tuesday, 12 October 2021 - Published forecast

Service estimate	Staffing hours	Contacts	AHT
<b>93%</b>	<b>+136</b>	<b>1754</b>	<b>303</b>
<small>Target service</small> 80% <small>Required</small> 230 <small>Service variance</small> +13% <small>Scheduled</small> 366			

**Projected daily summary for Community Enterprise Model**

Service estimate	Staffing hours	Contacts	AHT
<b>94%</b>	<b>+105</b>	<b>2243</b>	<b>291</b>
<small>Target service</small> 80% <small>Projected requirements</small> 261 <small>Service variance</small> +-66% <small>Scheduled</small> 366	<small>Projected requirements</small> 261 <small>Scheduled</small> 366	<small>Projected variance</small> 489	<small>Projected variance</small> -12

**Observed daily summary for Community Enterprise Model**  
 Tuesday, 12 October 2021









Service estimate	Staffing hours	Contacts	AHT
<b>89%</b>	<b>+14</b>	<b>+462</b>	<b>+6</b>
<small>Target service</small> 80% <small>Required</small> 89 <small>Service variance</small> 2% <small>Scheduled</small> 103	<small>Required</small> 89 <small>Scheduled</small> 103	<small>Forecasted contacts</small> 696 <small>Actual contacts</small> 1158	<small>Forecasted AHT</small> 285 <small>Actual AHT</small> 291







## Overview of Published Schedule Reports

Analysis, summary, utility, and printer-friendly reports based on and accessible within the published schedule.


### Schedule Analysis & Summary Reports

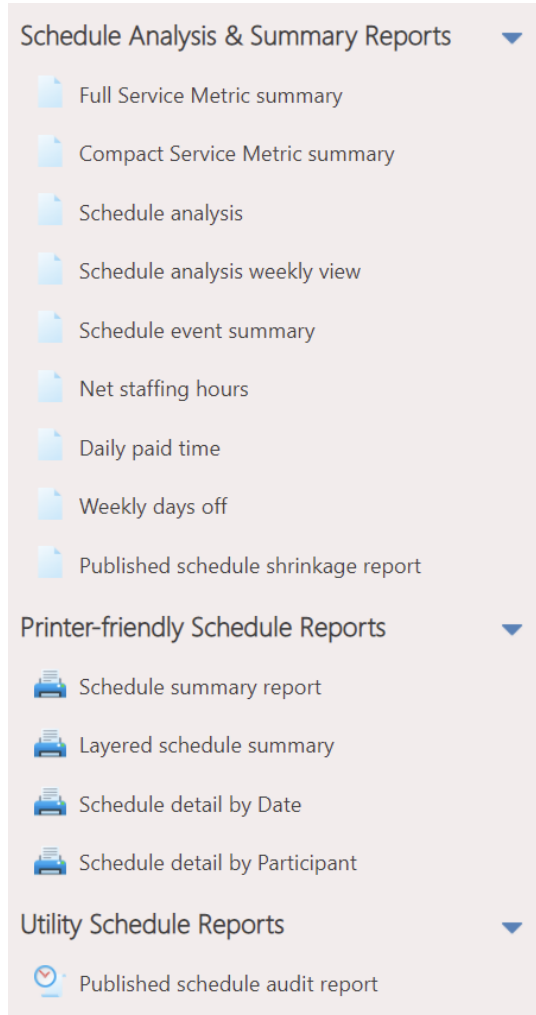
-  Full Service Metric summary
-  Compact Service Metric summary
-  Schedule analysis
-  Schedule analysis weekly view
-  Schedule event summary
-  Net staffing hours
-  Daily paid time
-  Weekly days off
-  Published schedule shrinkage report

### Printer-friendly Schedule Reports

-  Schedule summary report
-  Layered schedule summary
-  Schedule detail by Date
-  Schedule detail by Participant

### Utility Schedule Reports

-  Published schedule audit report



The screenshot shows a dropdown menu with three main sections:

- Schedule Analysis & Summary Reports** (indicated by a downward arrow):
  - Full Service Metric summary
  - Compact Service Metric summary
  - Schedule analysis
  - Schedule analysis weekly view
  - Schedule event summary
  - Net staffing hours
  - Daily paid time
  - Weekly days off
  - Published schedule shrinkage report
- Printer-friendly Schedule Reports** (indicated by a downward arrow):
  - Schedule summary report
  - Layered schedule summary
  - Schedule detail by Date
  - Schedule detail by Participant
- Utility Schedule Reports** (indicated by a downward arrow):
  - Published schedule audit report



# Contact Volume

## Historical

Use these reports to analyze your data for arrival patterns and forecasting. Analyze by data source or an activity in the Enterprise Model.

### Reports by Data Source

This report shows trends and provides data for analysis of your arrival patterns. Includes contact volume and average handle time from one or more collection points or imported from an Excel worksheet.

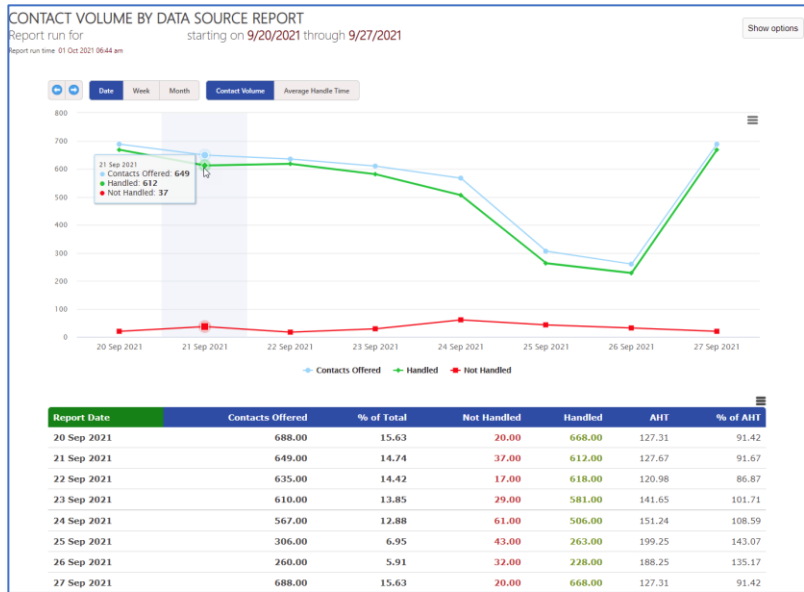
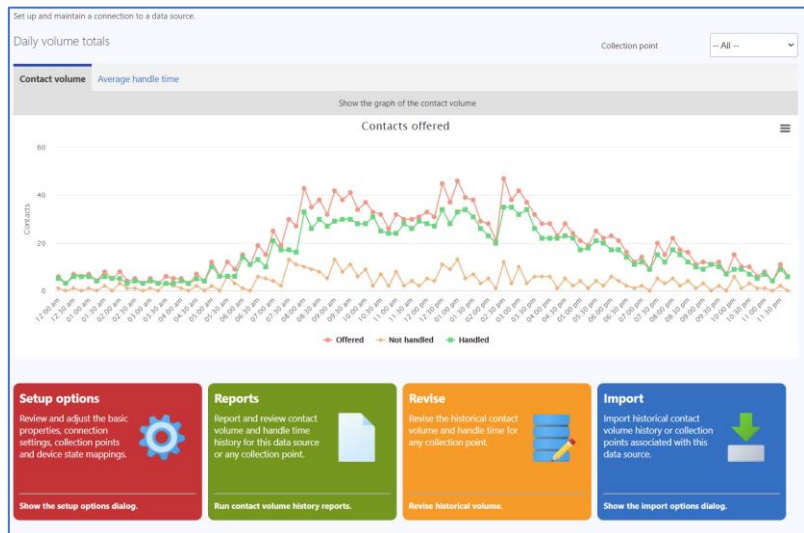
### Contact Volume options

Total contact volume by—

- ⌵ Date
- ⌵ Interval
- ⌵ Day of Week
- ⌵ Week
- ⌵ Month
- ⌵ Collection Point

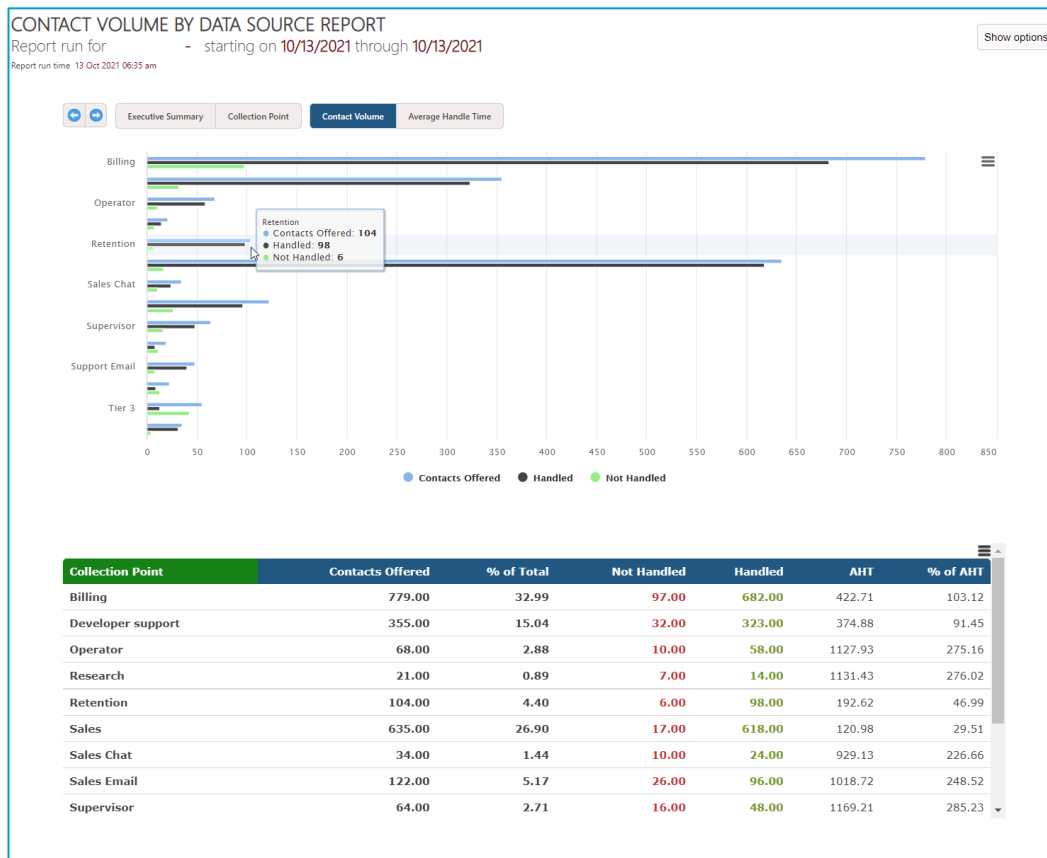
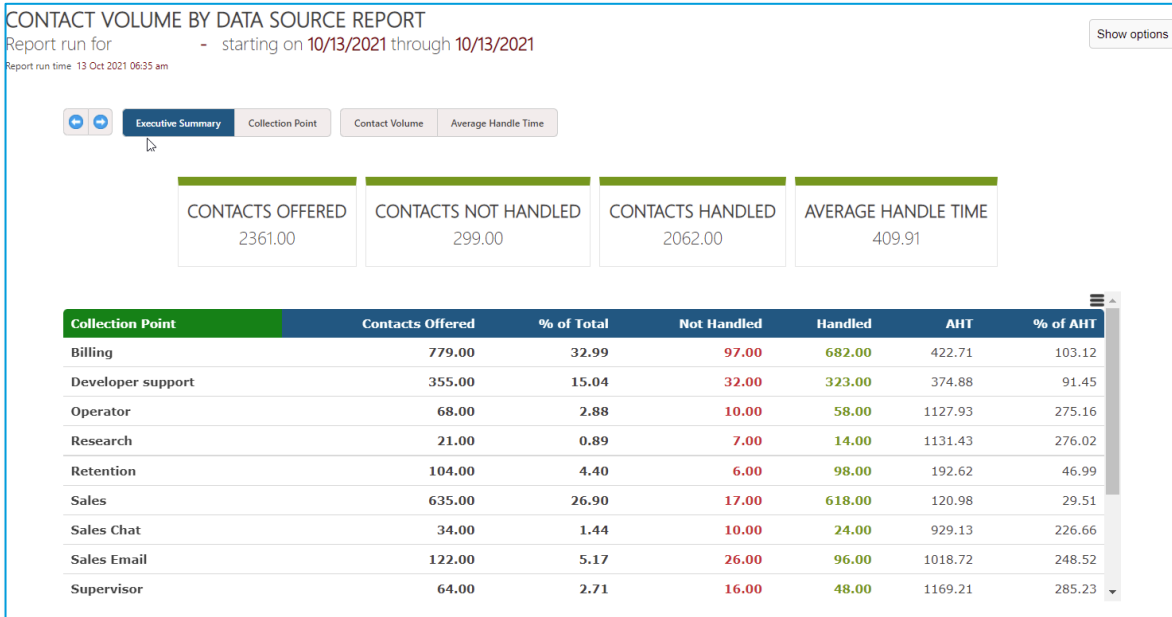
Average contact volume by—

- ⌵ Interval
- ⌵ Day of Week
- ⌵ Month
- ⌵ Collection Points





View totals or averages, by date, interval, day of week, collection point, from executive summary to details.





## Reports by Enterprise Model

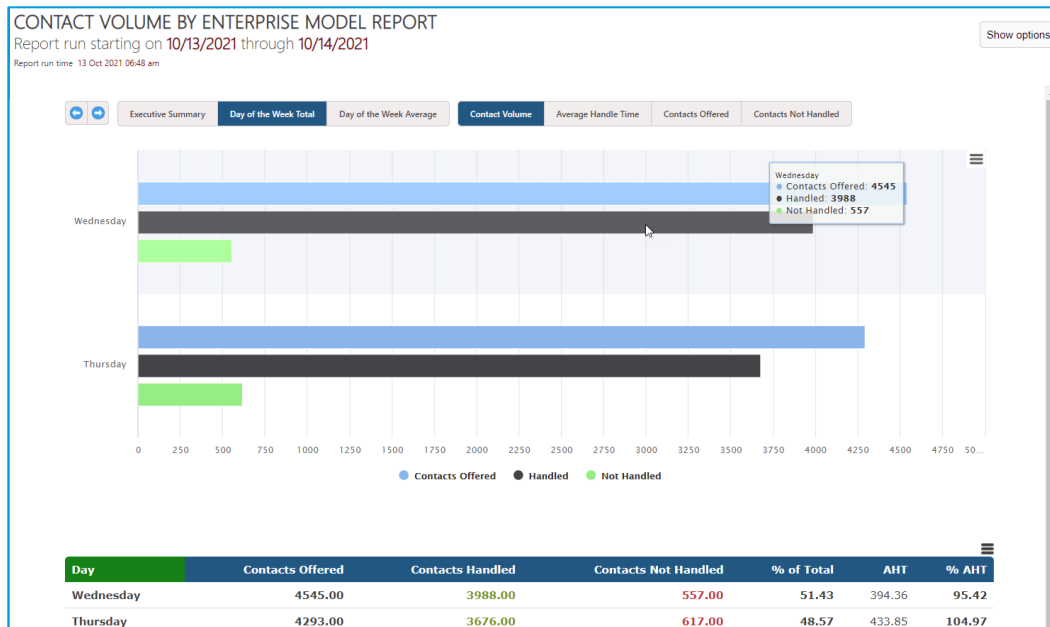
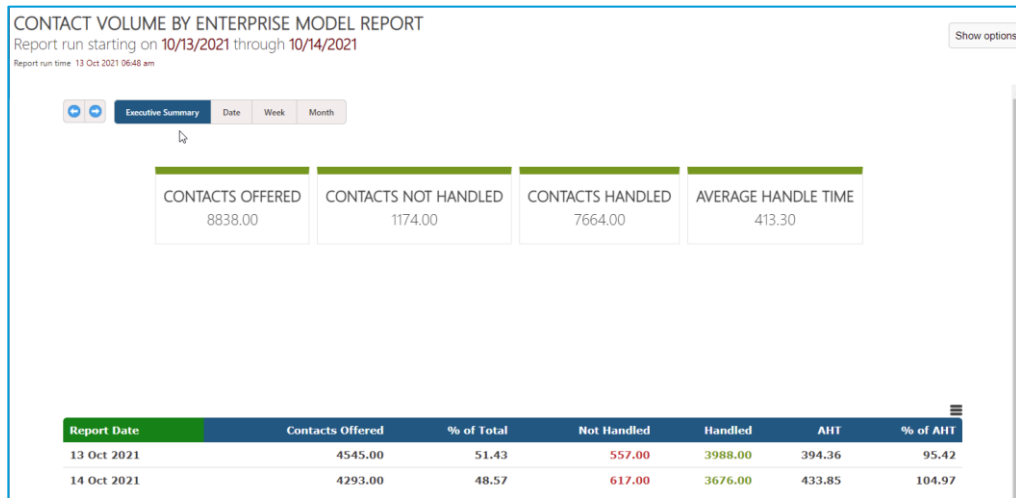
### Contact Volume options

**Total** contact volume by—

- ⌵ Date
- ⌵ Interval
- ⌵ Day of Week
- ⌵ Week
- ⌵ Month
- ⌵ Site, Folder, or Activity
- ⌵ Media type

**Average** contact volume by—

- ⌵ Interval
- ⌵ Day of Week
- ⌵ Month
- ⌵ Site, Folder, or Activity
- ⌵ Media type





## Forecast

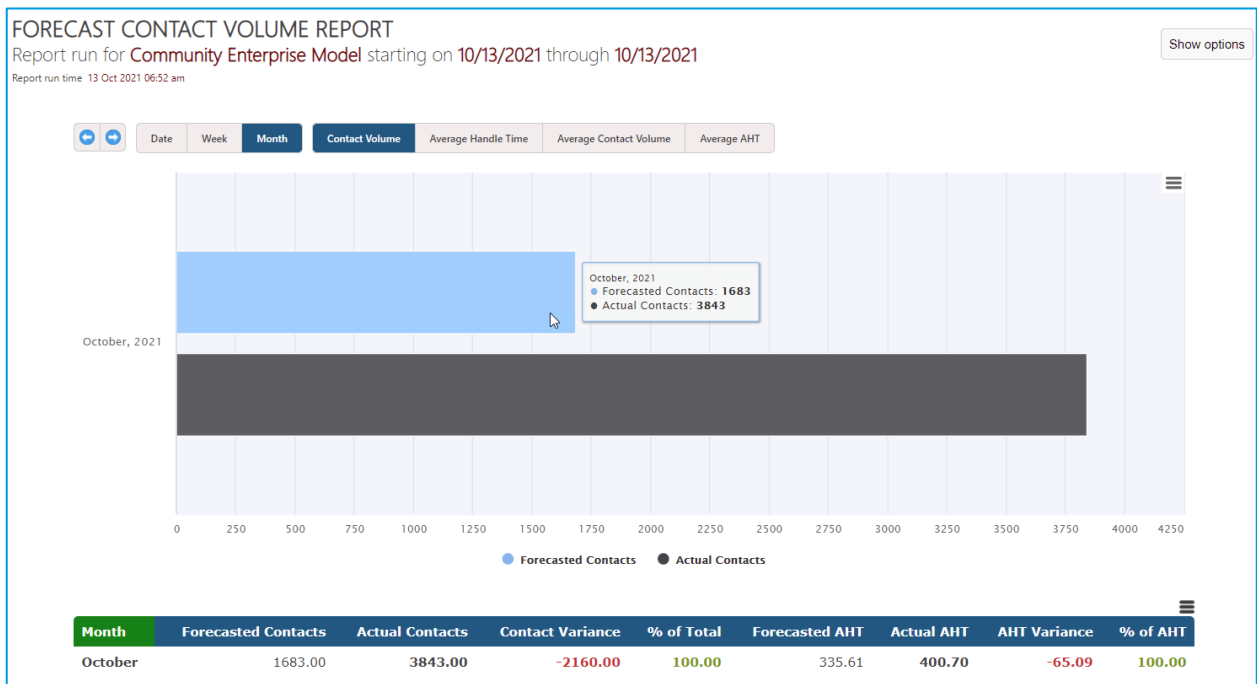
Create your forecast with historical contact volume data and analyze your forecast accuracy.

### Total Forecast Contacts by—

- ⌵ Date
- ⌵ Interval
- ⌵ Day of Week
- ⌵ Week
- ⌵ Month
- ⌵ Activity Type
- ⌵ Media Type

### Average Forecast Contacts by—

- ⌵ Interval
- ⌵ Day of Week
- ⌵ Month





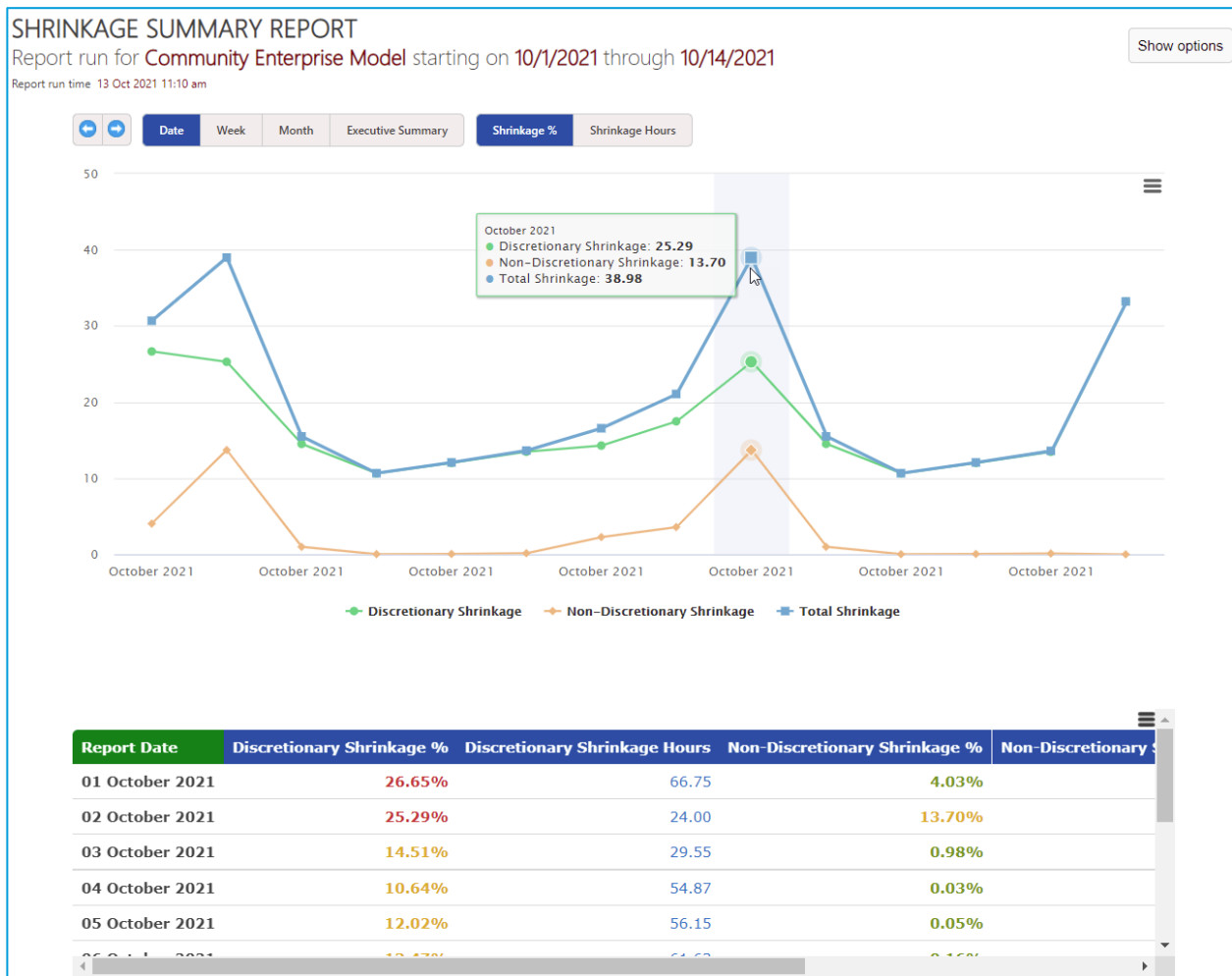
# Shrinkage

New in 5.0, use shrinkage reports to analyze, forecast with, and report on discretionary and non-discretionary shrinkage.

## Published schedule shrinkage

Display by shrinkage percent or shrinkage hours.

- % Executive Summary
- % Date
- % Week
- % Month

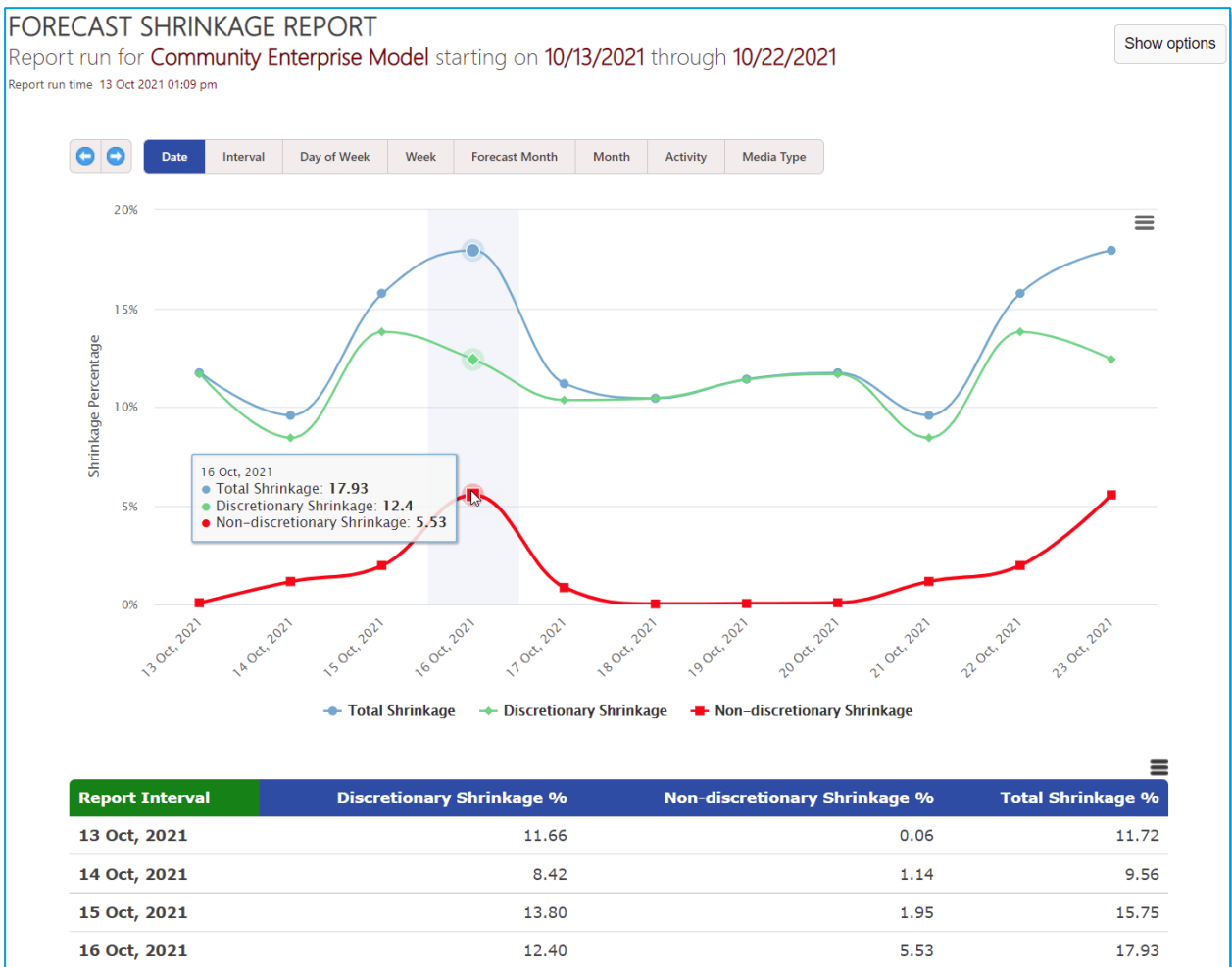




## Published forecast shrinkage

Results based on the published forecast.

- % Date
- % Interval
- % Day of Week
- % Week
- % Forecast Month
- % Month
- % Activity
- % Media Type





# Staffing Requirements

## Historical

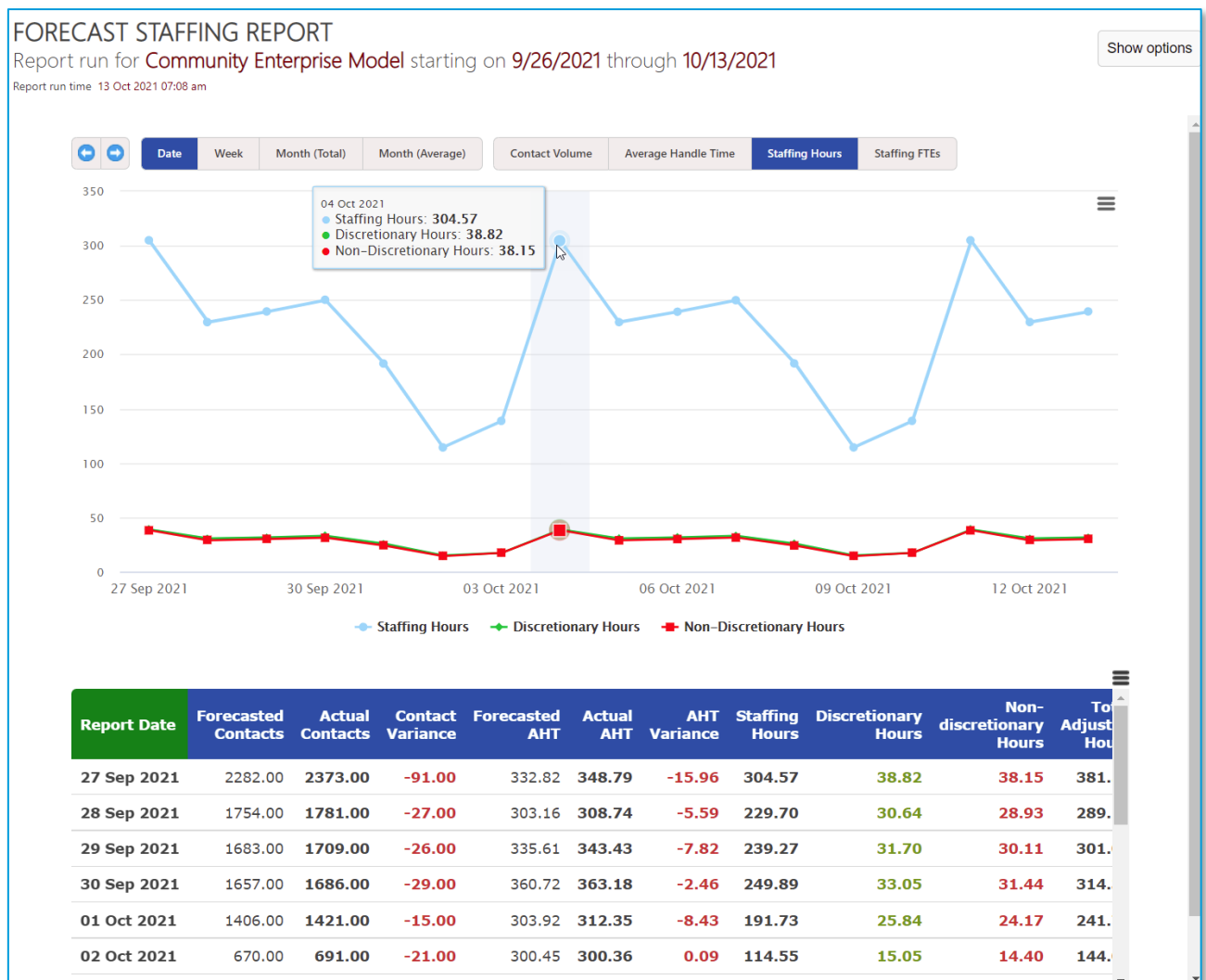
This includes forecasted requirements based on contact volume, handle time, service target, and shrinkage.

Enter a date range to see historical data by:

Filter by:

- Date
- Week
- Month (Total)
- Month (Average)

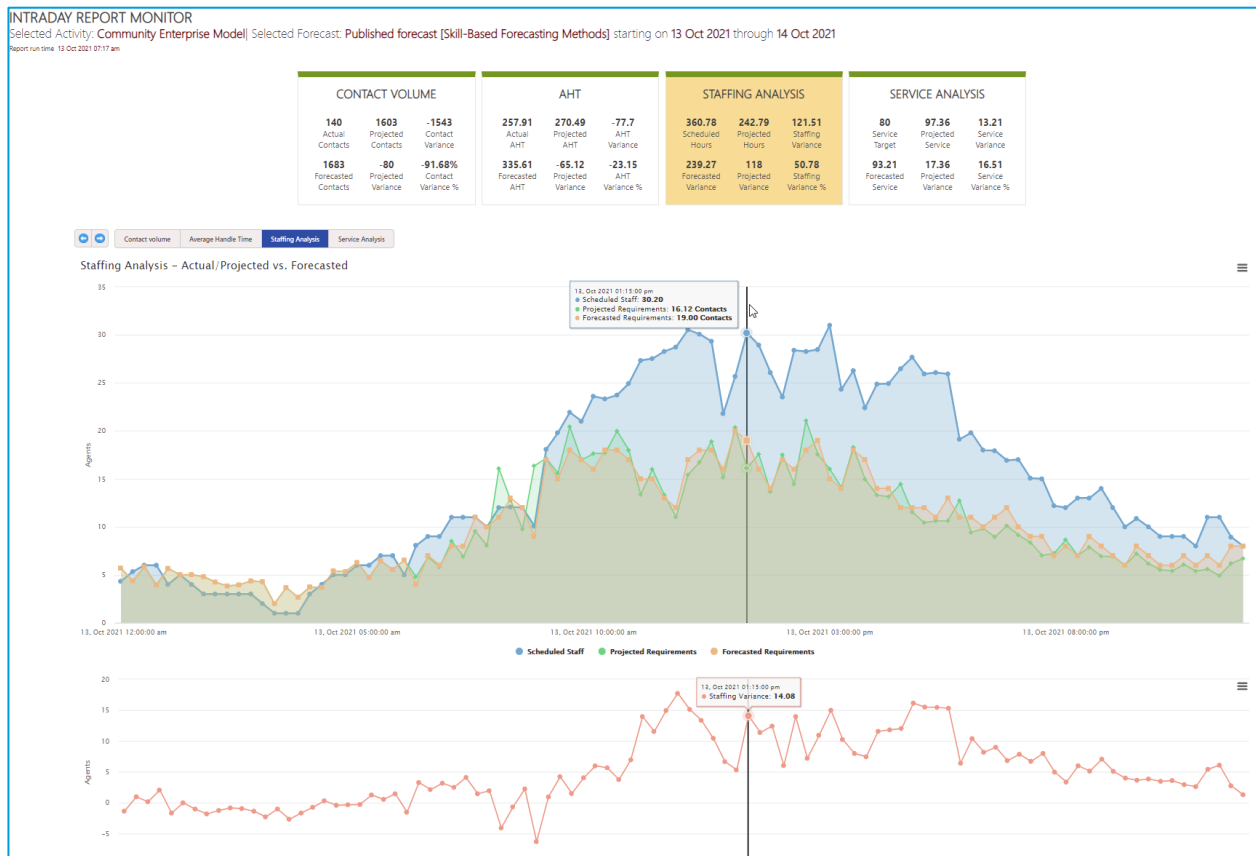
- Date
- Interval
- Days
- Miscellaneous





## Daily

The intraday performance monitor allows you to see the forecasted, actual, and projected staffing requirements. Run this report on a working forecast or a published forecast. In the table, view the current hour and projections for the rest of the day.



**INTRADAY REPORT MONITOR**  
 Selected Activity: Community Enterprise Model | Selected Forecast: Published forecast [Skill-Based Forecasting Methods] starting on 13 Oct 2021 through 14 Oct 2021  
 Report run time: 13 Oct 2021 07:17 am

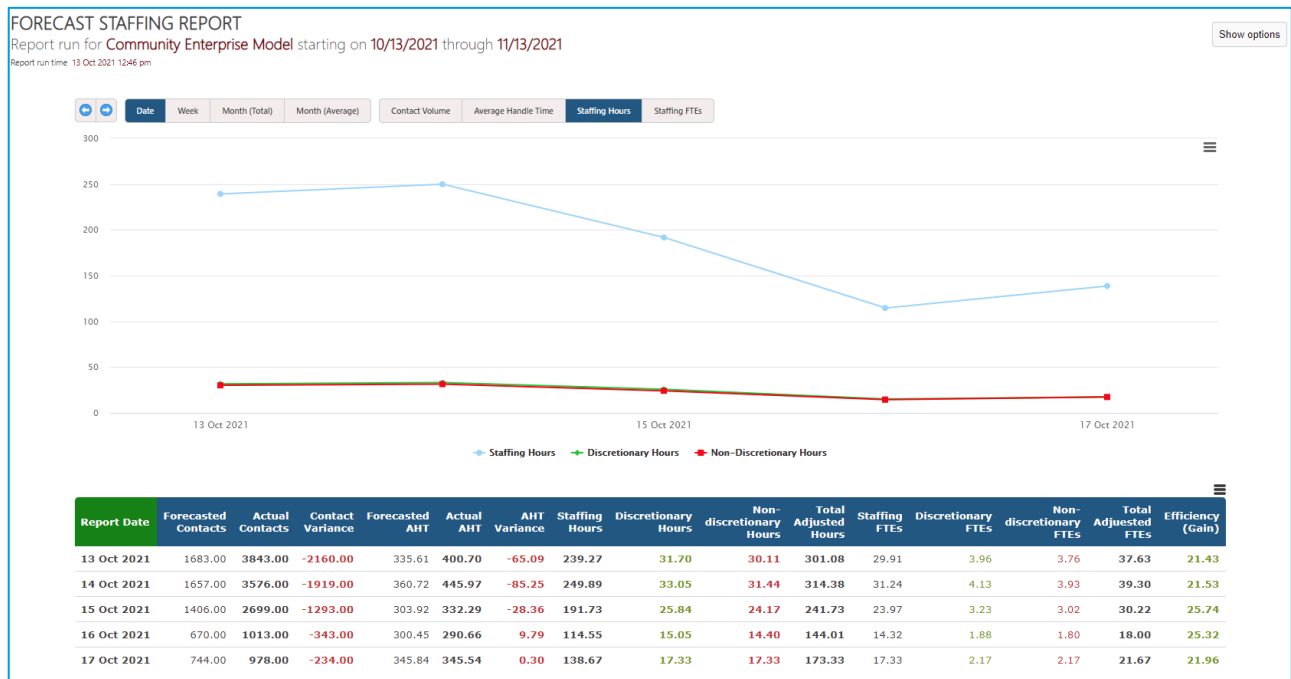
Report Date	Scheduled Staff	Forecasted Requirements	Forecast Variance	Projected Requirements	Projected Variance
13 Oct 05:15 am	6.00	4.75	1.25	4.75	
13 Oct 05:30 am	7.00	6.45	0.55	6.45	
13 Oct 05:45 am	7.00	5.55	1.45	5.55	
13 Oct 06:00 am	5.00	6.53	-1.53	6.53	
13 Oct 06:15 am	8.07	4.79	3.27	4.00	4.07
13 Oct 06:30 am	9.00	6.86	2.14	7.00	2.00
13 Oct 06:45 am	9.00	5.83	3.17	6.00	3.00
13 Oct 07:00 am	11.00	8.51	2.49	8.00	3.00
13 Oct 07:15 am	11.00	6.90	4.10	8.00	3.00
13 Oct 07:30 am	11.00	9.55	1.45	11.00	0.00
13 Oct 07:45 am	10.00	8.05	1.95	10.00	0.00
13 Oct 08:00 am	12.00	16.08	-4.08	11.00	1.00
13 Oct 08:15 am	12.07	12.75	-0.68	13.00	-0.93
13 Oct 08:30 am	12.00	9.76	2.24	12.00	0.00
13 Oct 08:45 am	10.07	16.36	-6.29	9.00	1.07
13 Oct 09:00 am	18.07	17.13	0.94	17.00	1.07
13 Oct 09:15 am	19.80	15.58	4.22	15.00	4.80



## Forecast

There are three places where you can view a forecast for staffing requirements—

1. in a working forecast,
2. the published forecast,
3. or the intraday performance monitor.





## Published Schedules

Use the published schedule report to see your coverage on a daily basis. By day and interval, you can see if you have enough staff to meet your service level.

View published schedules in the published schedule report and adherence report. There are also several printer-friendly reports.

## Historical

Use the published schedule analysis detail report to compare your forecast to actuals. You can use this report to make informed decisions about upcoming forecasts.

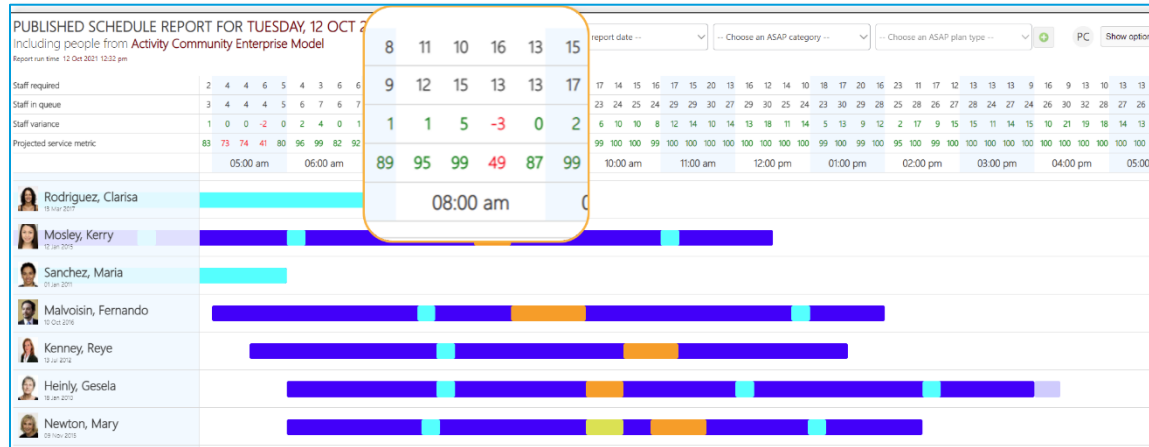
- Executive summary
- Contact volume
- AHT
- Staffing
- Service estimate





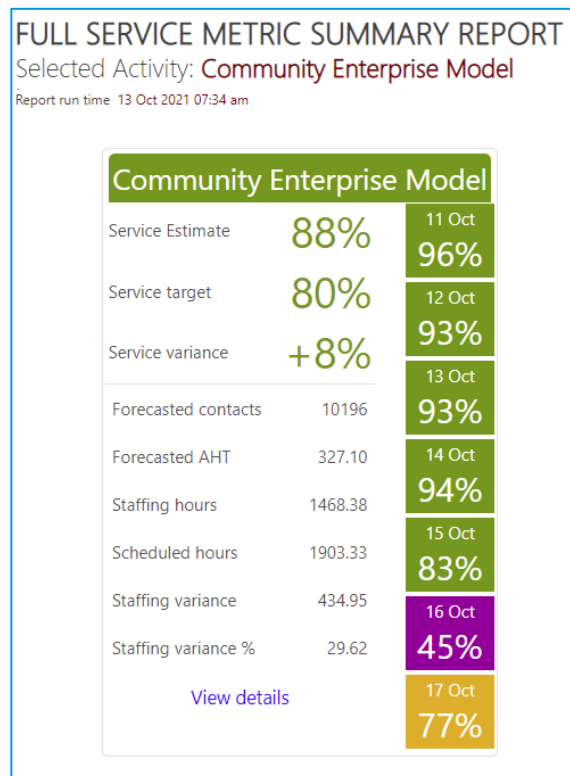
## Daily

Review the published schedule > schedule details to see all of your agent’s schedules. From here you can edit schedules, create automated schedule adjustment plans (ASAPs), and view staffing requirements by interval with projected service metric.



## Forecast

See an overview of the week with the Full Service Metric Summary Report.

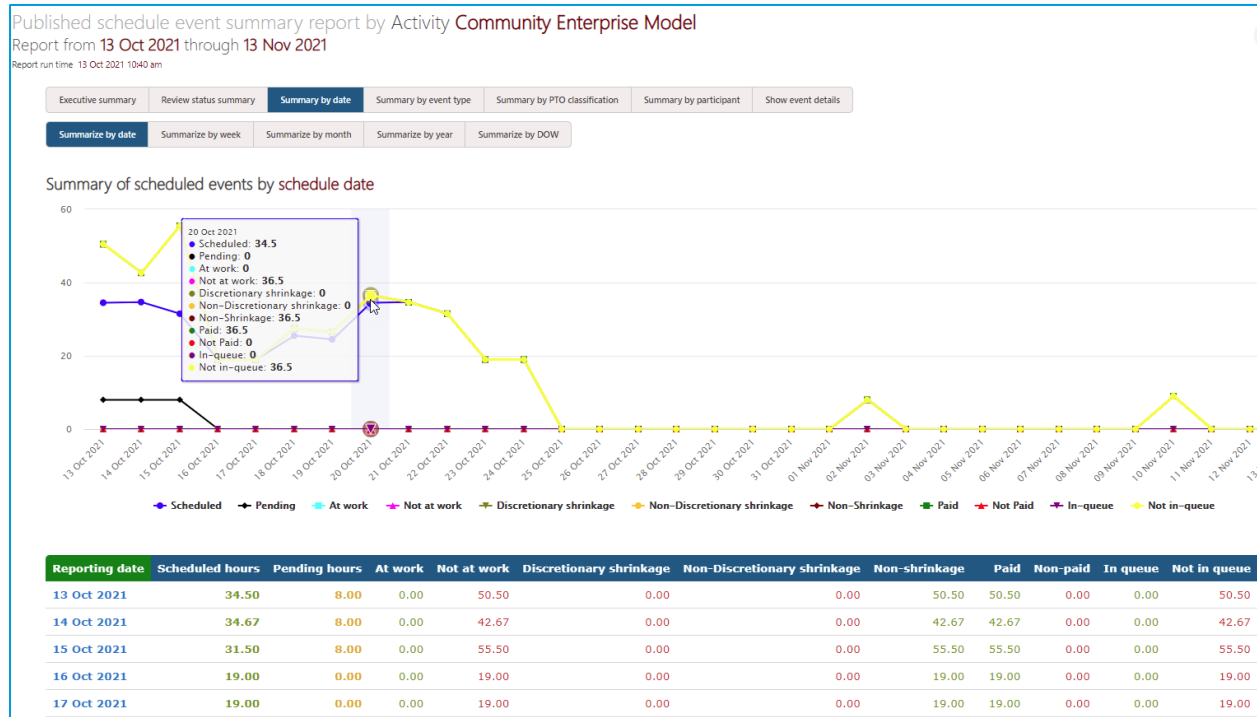




## Time Off Reports

This report is the same as the published schedule event summary report but is restricted to events that occur off site, are not in queue, and require supervisor approval.

Includes executive summary down to the event details and can filter by event status, event type, PTO classification, participant, then filter further by date, week, month, year, day of week.



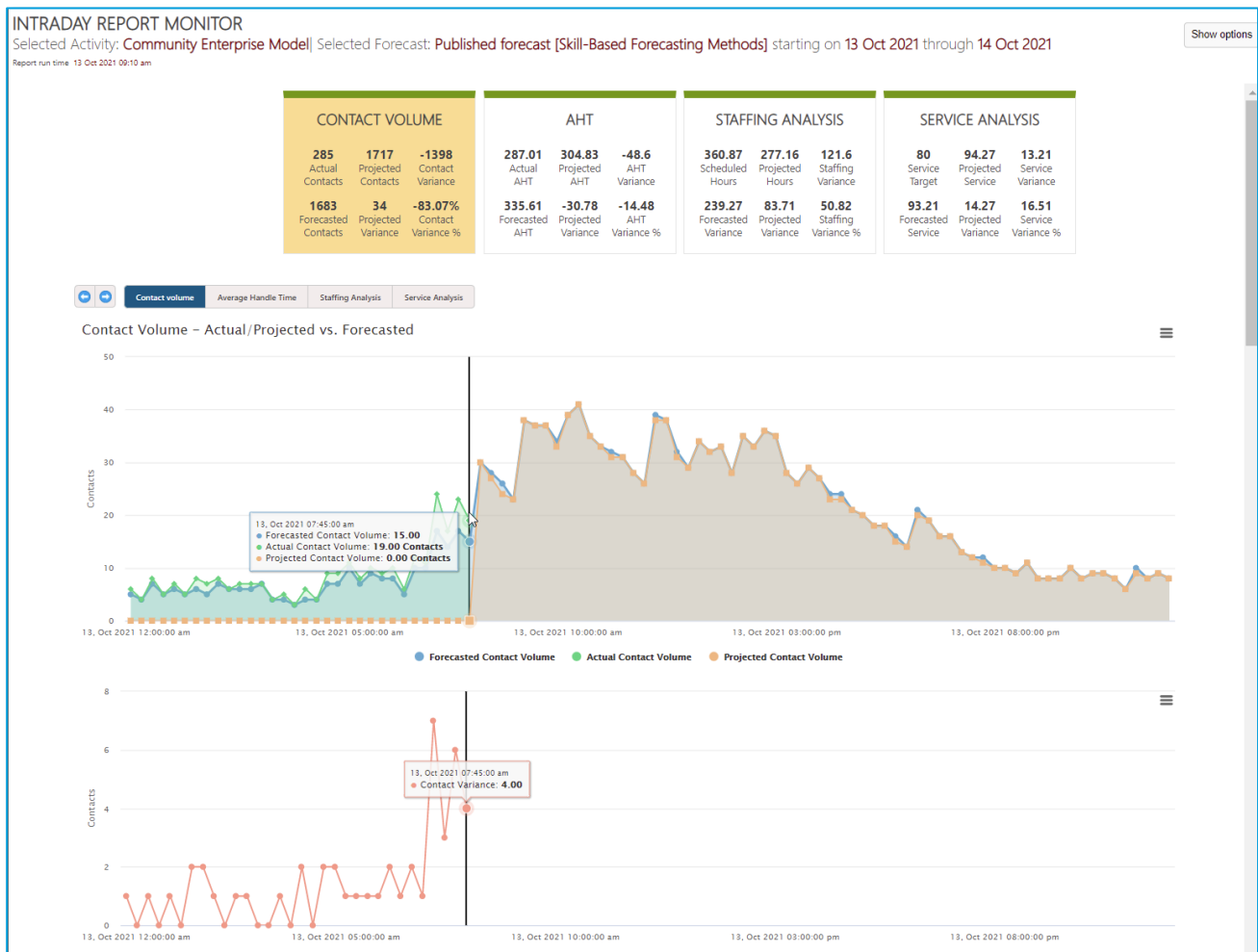


## Intraday Analysis

These reports include the intraday performance monitor and schedule analytics. They will let you know how your day is going, if your forecast is accurate, and whether you have the appropriate number of staff for the day.

### Intraday performance monitor

Show today's past performance and projections for the remainder of the day. It allows you to see the forecasted, actual and projected staffing requirements. The report includes contact volume, AHT, Staffing Analysis, and service analysis.





## Schedule analytics

Review key performance metrics from the published schedule including service estimate and staffing by current time, hourly, today, tomorrow, or this week.

### Schedule analytics

Current Hourly **Today** Tomorrow This week Options

Key performance metrics for today up until the current time interval

Forecasted daily summary for Community Enterprise Model  
Wednesday, 13 October 2021 - Published forecast

Service estimate	Staffing hours	Contacts	AHT
93%	+122	1683	336
Target service 80% Service variance +13%	Required 239 Scheduled 361		

Projected daily summary for Community Enterprise Model

Service estimate	Staffing hours	Contacts	AHT
94%	+84	1717	305
Target service 80% Service variance +66%	Projected requirements 277 Scheduled 361	Projected variance 34	Projected variance -31

Observed daily summary for Community Enterprise Model  
Wednesday, 13 October 2021

Service estimate	Staffing hours	Contacts	AHT
81%	+0	+17	-56
Target service 80% Service variance -6%	Required 46 Scheduled 46	Forecasted contacts 268 Actual contacts 285	Forecasted AHT 343 Actual AHT 287

Update

### Schedule analytics

Current **Hourly** Today Tomorrow This week Options

Key performance metrics summarized by each hour and projections for the next few hours

Hourly summary statistics for Community Enterprise Model  
Wednesday, 13 October 2021 - Published forecast

		Service estimate	Staff hours	Contacts	AHT
12:00 am	Forecast	82%	5	21	457
	Observed	78.99%	6	23	316
	Variance	+2%	1	+2	-141



## Adherence

Monitor your agents' adherence to their schedules. View daily, weekly, monthly, annual adherence. Agents also have their own adherence report.

### Daily Schedule Adherence

This is a report to run first thing in the morning and leave it running during the day. It includes everything from a published schedule, and you can quickly verify what agents are actually doing during a shift. Because this is a published schedule, you can make edits to the schedule within the report or create ASAPs. It also includes a graphical representation of the device state details as a third rail.



There are many options for this report, including whether to suppress or include people with schedules for the day, and even whether to send notifications to agents when changes are made to the schedule.

**Additional display options**

Drag snap interval  
15

Suppress display of people with no schedules?  
Yes, suppress display of people with no schedules.

Enable notifications for schedule changes?  
No, do not send notifications for schedule changes.

No, do not send notifications for schedule changes.  
Yes, send notifications for all schedule changes.

Full mode - display participant images and adherence summary informati

Automatic refresh interval  
Automatically refresh every 10 minutes.



## Schedule Adherence Alerts

Quickly view agents who are out of adherence (and for how long), and their current device state. You can even send the agent a message from within the report.

### Schedule Adherence Alerts Report

Applies to Activity: Community Enterprise Model [Optimized by Community WFM]

Agent Adherence Alerts as of Wednesday, 13 October 2021 08:51:03  
Using Time Zone: (GMT-06:00) Central Time (US & Canada)

Account, Service

Agents		13		1		1
	87 %		7 %		7 %	
Minutes			In Adherence			10

Fowler, Wendy

Sales AGent

Scheduled event Work

Scheduled time 08:00 AM

Actual state gone home  
Gone Home

Start time 12:01 AM

Adherence violation 00:51

Agent login dlinik

Malvoisin, Fernando

Operator

Scheduled event Work

Scheduled time 08:00 AM

Actual state acdagentnot...  
AcdAgentNot...

Start time 08:49 AM

Adherence violation 00:02

Agent login tkjoseph1

State	Agents	Percent	
[UNKNOWN]	1	6.67 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>
acd call	4	26.67 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>
acdagentnotanswering	1	6.67 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>
at lunch	1	6.67 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>
available	3	20.00 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>
follow up - extended	1	6.67 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>
gone home	1	6.67 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>
in a qa meeting	1	6.67 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>
on break	2	13.33 %	<div style="width: 100%; height: 10px; background-color: #00ff00;"></div>



## Schedule Adherence History

A historical view of agents' adherence to their schedules. Shows details by day, or subtotals by week, month, or any other date range.

**Historical Schedule Adherence Report**  
 Applies to Activity: Site 1 - Dallas, TX []  
 From: Sunday, 26 September 2021 Through: Sunday, 03 October 2021  
 Using Time Zone: (GMT-06:00) Central Time (US & Canada)  
 Wednesday, 13 Oct 2021 08:54:25 AM Account, Service

**Executive Summary**

Transaction Count	Scheduled In Queue	Actual In Queue	In Queue Variance	In Queue Variance %	Scheduled Out Of Queue	Actual Out Of Queue	Out Of Queue Variance	Out Queue Variance %	Total Scheduled	Total Variance	Total Adherence %	Non Scheduled / In Queue Hours
31.00	0.00	0.00	0.00	0.00 %	1.00	0.27	0.73	27.00 %	1.00	0.73	27.00 %	2.82

**Areheart, Sam**

**Azzarito, Deborah**

**Badgett, Gregory**

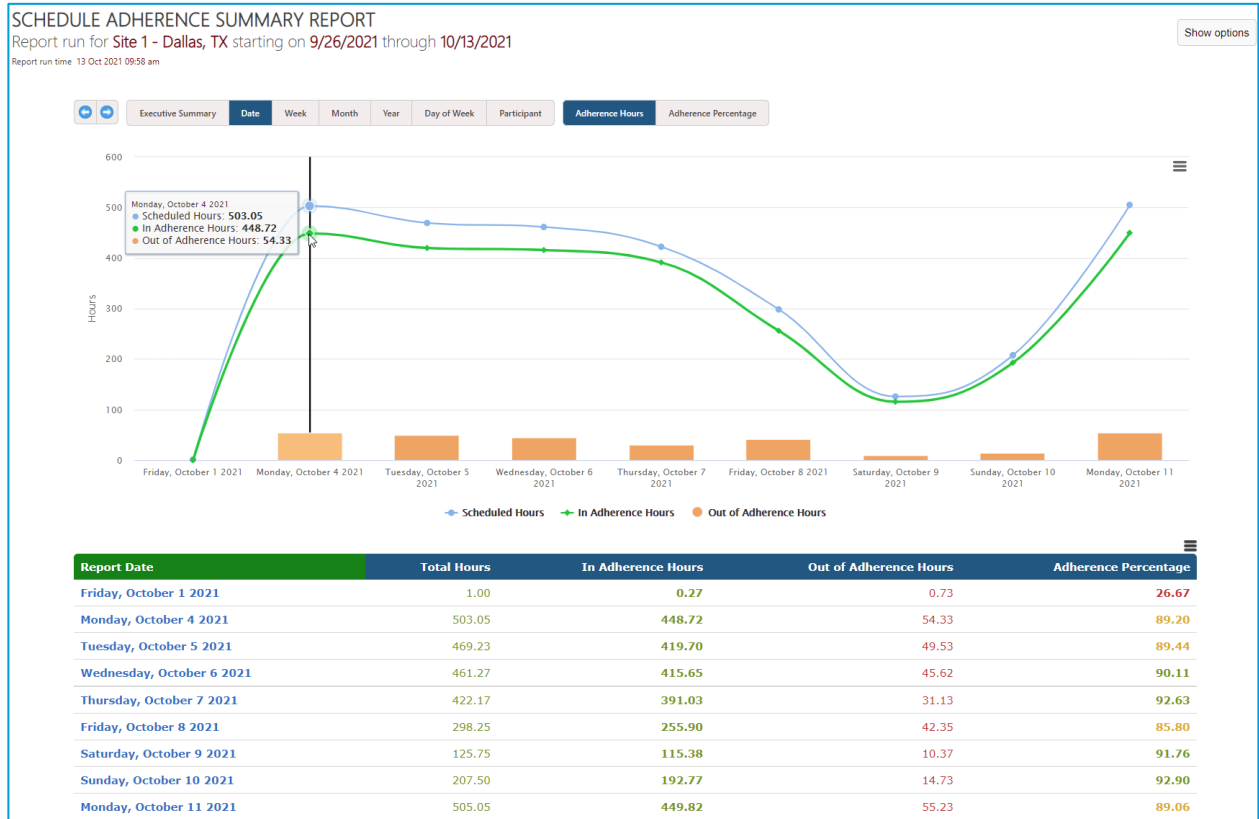
Schedule Date	Transaction Count	Scheduled In Queue	Actual In Queue	In Queue Variance	In Queue Variance %	Scheduled Out Of Queue	Actual Out Of Queue	Out Of Queue Variance	Out Queue Variance %	Total Scheduled	Total Variance	Total Adherence %	Non Scheduled / In Queue Hours
Friday, 01 October 2021	31	0.00	0.00	0.00	0.00 %	1.00	0.27	0.73	27.00 %	1.00	0.73	27.00 %	2.82
<b>Subtotal:</b>	<b>31.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00 %</b>	<b>1.00</b>	<b>0.27</b>	<b>0.73</b>	<b>27.00 %</b>	<b>1.00</b>	<b>0.73</b>	<b>27.00 %</b>	<b>2.82</b>

**Barton, Jean**



## 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.





## Device State Details

Shows all of the states an agent has been in on a given date.

Agent State Transaction Report  
 Applies to Activity: Site 1 - Dallas, TX   
 Report Date: Sunday, 26 September 2021  
 Using Time Zone: (GMT-06:00) Central Time (US & Canada)  
Wednesday, 13 Oct 2021 09:02:52 AM Account Service

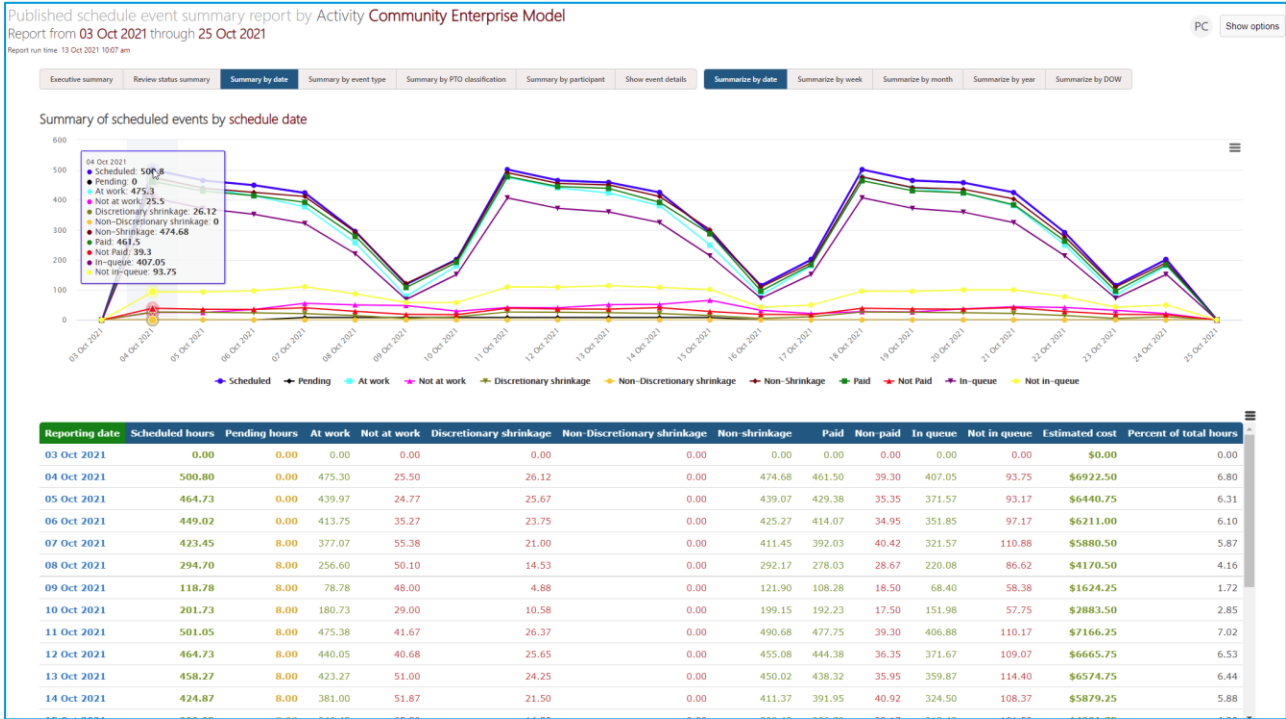
Areheart, Sam <span style="float: right;">1234 [0]</span>						
<small>No Transactions Found</small>						
Azzarito, Deborah <span style="float: right;">mabelend [0]</span>						
<small>No Transactions Found</small>						
Badgett, Gregory <span style="float: right;">daten [48]</span>						
State Name	Description	State ID	Transaction Start	Transaction End	Duration (Hours:Minutes:Seconds)	In Queue
gone home	Gone Home	3	26 Sep 2021 02:59:27 PM	26 Sep 2021 02:59:39 PM	00:00:12	False
available	Available	2	26 Sep 2021 02:59:39 PM	26 Sep 2021 03:09:45 PM	00:10:06	True
acd call	On ACD Call	2	26 Sep 2021 03:09:45 PM	26 Sep 2021 03:15:46 PM	00:06:01	True
follow up	Follow Up	2	26 Sep 2021 03:15:46 PM	26 Sep 2021 03:16:06 PM	00:00:20	True
available	Available	2	26 Sep 2021 03:16:06 PM	26 Sep 2021 03:35:07 PM	00:19:01	True
acd call	On ACD Call	2	26 Sep 2021 03:35:07 PM	26 Sep 2021 03:54:47 PM	00:19:40	True
follow up	Follow Up	2	26 Sep 2021 03:54:47 PM	26 Sep 2021 03:55:07 PM	00:00:20	True
available	Available	2	26 Sep 2021 03:55:07 PM	26 Sep 2021 04:21:06 PM	00:25:59	True
acd call	On ACD Call	2	26 Sep 2021 04:21:06 PM	26 Sep 2021 04:37:17 PM	00:16:11	True
follow up	Follow Up	2	26 Sep 2021 04:37:17 PM	26 Sep 2021 04:37:37 PM	00:00:20	True
available	Available	2	26 Sep 2021 04:37:37 PM	26 Sep 2021 05:15:09 PM	00:37:32	True
on break	On Break	3	26 Sep 2021 05:15:09 PM	26 Sep 2021 05:30:43 PM	00:15:34	False
available	Available	2	26 Sep 2021 05:30:43 PM	26 Sep 2021 06:05:51 PM	00:35:08	True
restroom	Restroom	3	26 Sep 2021 06:05:51 PM	26 Sep 2021 06:10:30 PM	00:04:39	False
available	Available	2	26 Sep 2021 06:10:30 PM	26 Sep 2021 06:17:08 PM	00:06:38	True
acd call	On ACD Call	2	26 Sep 2021 06:17:08 PM	26 Sep 2021 06:27:26 PM	00:10:18	True
follow up	Follow Up	2	26 Sep 2021 06:27:26 PM	26 Sep 2021 06:27:46 PM	00:00:20	True
available	Available	2	26 Sep 2021 06:27:46 PM	26 Sep 2021 07:00:08 PM	00:32:22	True
at lunch	At Lunch	3	26 Sep 2021 07:00:08 PM	26 Sep 2021 08:00:42 PM	01:00:34	False
available	Available	2	26 Sep 2021 08:04:38 PM	26 Sep 2021 08:10:03 PM	00:05:25	True
follow up - extended	Follow Up - Extended	2	26 Sep 2021 08:10:03 PM	26 Sep 2021 08:13:41 PM	00:03:38	True
available	Available	2	26 Sep 2021 08:13:41 PM	26 Sep 2021 08:44:33 PM	00:30:52	True
acd call	On ACD Call	2	26 Sep 2021 08:44:33 PM	26 Sep 2021 09:18:13 PM	00:33:40	True
follow up	Follow Up	2	26 Sep 2021 09:18:13 PM	26 Sep 2021 09:18:33 PM	00:00:20	True



## Published Event: Summary or Detail

Report hours by event type and interval.

This report summarizes all of the events in a published schedule by total hours, paid status, at work status, in queue status, and shrinkage. Review by date, event type, PTO classification, participant, and event.



When sorted for details, this is where you can approve, deny, revalidate, or remove time off requests.

Published schedule event summary report by Activity Community Enterprise Model  
Report from 04 Oct 2021 through 04 Nov 2021  
Report run time 04 Oct 2021 10:00 am

Executive summary | Review status summary | Summary by date | Summary by event type | Summary by PTO classification | Summary by participant | **Show event details**

Event details

Participant	Event type	Event from	Event through	Start time	End time	Total hours	Event hours	Review status	Description (comments)	Created on
Sanchez, Maria	PTO	04 Oct 2021	04 Oct 2021	02:00 am	06:00 am	4.00	4.00	Approved	Honeymoon	01 Oct 2021 02:23 pm
Carabo, Randy	PTO	04 Oct 2021	04 Oct 2021	09:00 am	07:00 pm	10.00	10.00	Approved	Vacation	01 Oct 2021 02:23 pm
Horne, Andy	PTO	04 Oct 2021	04 Oct 2021	09:00 am	03:30 pm	6.50	6.50	Approved	Vacation	01 Oct 2021 02:23 pm
Sutherland, Todd	PTO	04 Oct 2021	04 Oct 2021	10:00 am	03:00 pm	5.00	5.00	Approved	Vacation	01 Oct 2021 02:23 pm



## Other Reports

### Administrative Reports


#### Change Audit Log

Click Report for a category to view changes made to the system, including the person who made the change.


### Change audit log

Review changes to key application components


**Current audit report types**  
Select the type of audit report you want to review, and click the corresponding tile.



Application



PTO Application



Security

**Current audit report sources**  
The list below shows the sources of audit entries for your report.

Name	Description	Report
<b>Agent Image</b>	Reports changes to agent images	<a href="#">Report</a>
<b>Calendar partition bid round responses</b>	Reports changes to time off requests as part of a calendar partition bid round.	<a href="#">Report</a>
<b>Collection Points</b>	Reports changes to a collection point or any of the historical data collected for the collection point.	<a href="#">Report</a>
<b>Community Group Member</b>	Reports changes to members of all community groups (User groups). Includes adding and removing members from the group.	<a href="#">Report</a>
<b>Data Sources</b>	Reports changes to a data source properties.	<a href="#">Report</a>
<b>Recurring Events</b>	Reports changes to recurring events on the published schedule.	<a href="#">Report</a>
<b>Schedule Event</b>	Reports changes to any published or working schedule event by any user. Includes edits thru dialog windows and drag and drop operations.	<a href="#">Report</a>
<b>Time Off Request</b>	Reports changes to time off requests	<a href="#">Report</a>
<b>Time zone configuration</b>	Reports changes to the configured set of time zone definitions.	<a href="#">Report</a>



## Event Review Status Change

A list of event changes, such as approved and denied events.

Name	Review status	Reviewed by	Reviewed on	Event date	Event type	Description	Notes
Nelson, Candice	Approved	Account, Service	Monday, 11 Oct 2021	Monday, 11 Oct 2021 12:00 PM	Late	Created by soft checkin monitor	Created by soft checkin monitor
Goldfarb, Brett	Approved	Account, Service	Monday, 11 Oct 2021	Monday, 11 Oct 2021 06:00 PM	Late	Created by soft checkin monitor	Created by soft checkin monitor
Badgett, Gregory	Denied	Account, Service	Tuesday, 12 Oct 2021	Friday, 15 Oct 2021 12:00 AM	PTO	birthday!	Y
Badgett, Gregory	Denied	Account, Service	Tuesday, 12 Oct 2021	Friday, 15 Oct 2021 12:00 AM	PTO	birthday!	Y

## Agent Data Source Login

Quickly view agents without data source logins, those without a default data source, and the default source for all agents. This is a useful report when needing to collect Employee IDs.

Agent Id	Agent Name	Employee Id	Hire Date	Title
539	Duncan, Kaenenball		06 October 2021	
538	Smith, Karina		26 August 2020	

Agent Id	Agent Name	Employee Id	Hire Date	Title	Default Data Source Type	Default Data Source Name	Login Id
278	Areheart, Sam	SCA21218	11 July 2016	Sales/Service Rep	Avaya ACD	CMS Enterprise ACD	1234
156	Azzarito, Deborah	dka21094	21 September 2015	Sales/Service Rep	13	Enghouse	mabelend
453	Badgett, Gregory	GAB21254	12 June 2017	Sales/Service Rep	13	Enghouse	dadn
451	Barton, Jean	JBarton	12 June 2017	Sales/Service Rep	13	Enghouse	ladhikari
479	Bickley, Sharon	SBickley	10 July 2017	Sales/Service Rep	13	Enghouse	mrawahneh
411	Bixler, Lyon	lbixler	15 May 2017	Sales/Service Rep	13	Enghouse	malmanza
27	Blakely, Latrice	LNB21249	01 December 2014	Sales/Service Rep	13	Enghouse	raoshana
467	Brown, Chanell	cab17889	12 June 2017	Sales/Service Rep	13	Enghouse	jarevalorivers
263	Brunson, David	dbrunson	23 June 2016	Sales/Service Rep	13	Enghouse	katkins
402	Burns, Barbara	BBurns	10 April 2017	Sales/Service Rep	13	Enghouse	fbarrezueta
391	Carabo, Randy	rcarabo	13 March 2017	Sales/Service Rep	13	Enghouse	kbazaldua



## Device setup report

Settings > People & agent templates > Device setup report

A simple listing of each person and their notifications — SMS devices, external email addresses, and push devices.

### Agent device configuration report

Friday, 01 Oct 2021 06:13:55 AM Account, Service

[Areheart, Sam](#)  
Notification device list

Phone number	Device name	Is enabled?
(555) 555-1212	work cell	True

Email address	Device name	Is Enabled?
home@myhome.com	home email	True

This person doesn't have any push devices set up.

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[Azzarito, Deborah](#)  
Notification device list

Phone number	Device name	Is enabled?
(555) 555-1212	Cell Phone	True

Email address	Device name	Is Enabled?
agent@mycompany.com	work email	True

This person doesn't have any push devices set up.