



Reports and Reporting

Webinar handout
Version: April 18, 2024



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About this Document

This document accompanies the CommunityWFM College webinar *Reports and reporting*. It includes additional details and a list of all reports discussed during the webinar (and more).

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 during the webinar and in this document.

Many reports also have multiple levels, from an executive summary down to the daily details, all easily accessible with the filters on the page. Most reports include a *Show options* panel that allows customizing the report parameters. Additionally, most reports may be exported in the form of a .csv or .xlsx file for additional manipulation. Reports with ☰ have exporting available.

Data Targets, an optional module, allows reports to be customized and scheduled for export to reporting repositories or 3rd party solutions such as payroll or HR. Contact your account representative for more information.

Report Pack Organization

This document reviews each report in the Report tab, top to bottom, then reviews reports located in other areas of the application.

You can run many of the same reports from the Report tab and work areas. For example, run a published forecast staffing requirements report from Report > Published forecast > Staffing requirements, or from Forecast > Published forecast > Generate forecast reports.



Overview of Report Tab

Access many frequently used reports from a central location—the Report tab.



Report

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

Contact volume

- Enterprise model: Show the enterprise model report.
- Data source: Show the data source report.

Published forecast

- Contact volume & handle time: Show the published volume report.
- Service targets: Show the published service target report.
- Shrinkage percentages: Show the published shrinkage report.
- Staffing requirements: Show the published staff required report.

Published schedule

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

Intraday analysis

- Intraday performance monitor: Show the intraday performance monitor.
- Schedule analytics: Review current schedule analytics.

Schedule adherence

- Daily schedule adherence: Show daily schedule adherence reports.
- Adherence alerts: Show schedule adherence alerts.
- Schedule adherence history: Go to the adherence history reports.
- Schedule adherence summary: Launch the Adherence Summary Report.
- Device state detail report: Go to device state detail report.
- Daily paid time: Go to the daily paid time report.
- Schedule adherence comparison: Launch the Adherence Comparison Report.

Administrative & utility

- Application exceptions: Show the application error report.
- Data source logins: Show the data source login report.
- Database health and statistics: Review database health and statistics.
- Event Review Status Change: Show the event review status change report.
- Change audit log: Review the change audit log.
- Data targets: Set up your data targets.
- User Logon Report: Show the user login report.

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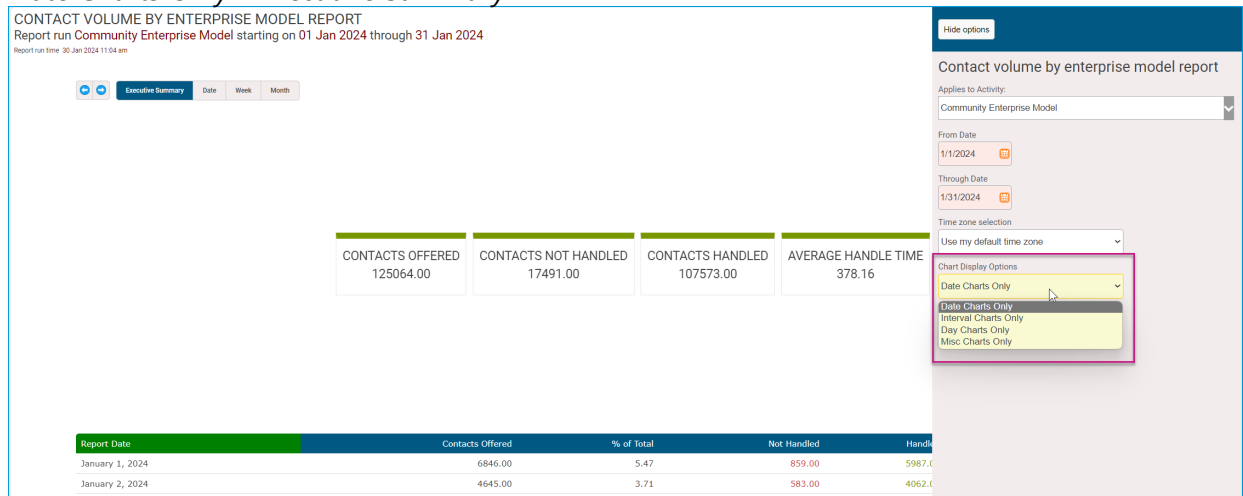
Contact Volume

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

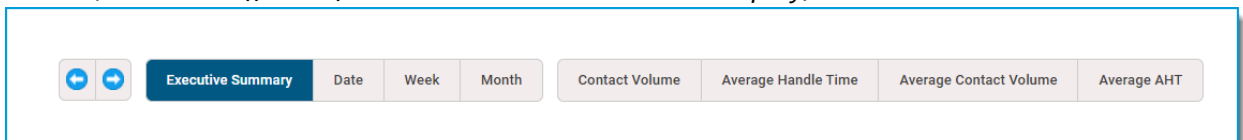
Enterprise model

Use the *Chart Display Options* in the *Show options* panel then select filters to access different views.

Date Charts Only – Executive Summary



Filters (there are different filters based on selected chart display)



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



Data source

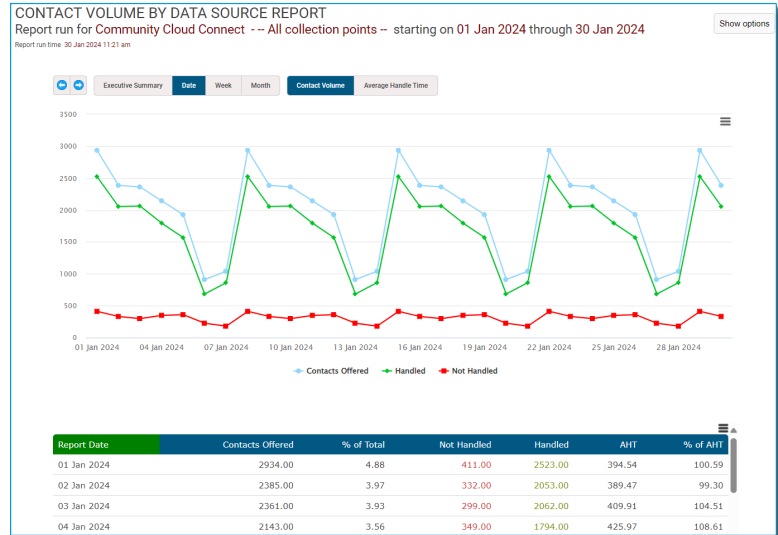
This report shows trends and provides data for analysis of your arrival patterns. It includes contact volume and average handle time from one or all collection points or imported from an Excel worksheet. Use the *Chart Display Options* in the *Show options* panel to access the different views.

Total contact volume by—

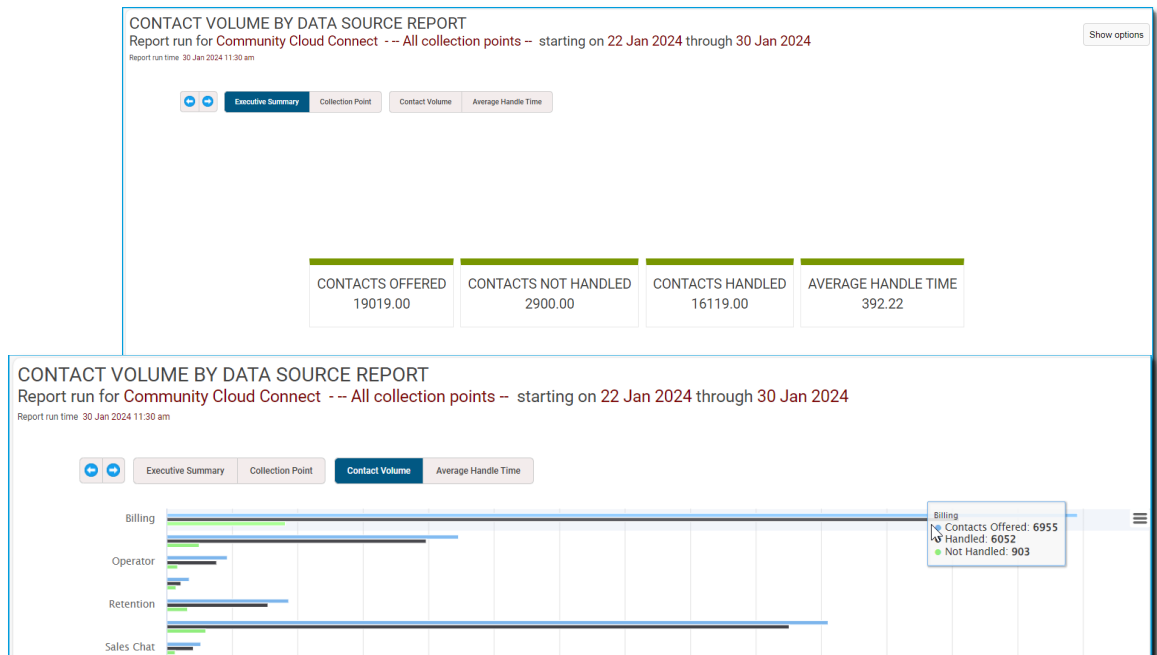
- ⌵ Date
- ⌵ Interval
- ⌵ Day of Week
- ⌵ Week
- ⌵ Month
- ⌵ Collection Point

Average contact volume by—

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



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





Published forecast

Contact volume & handle time

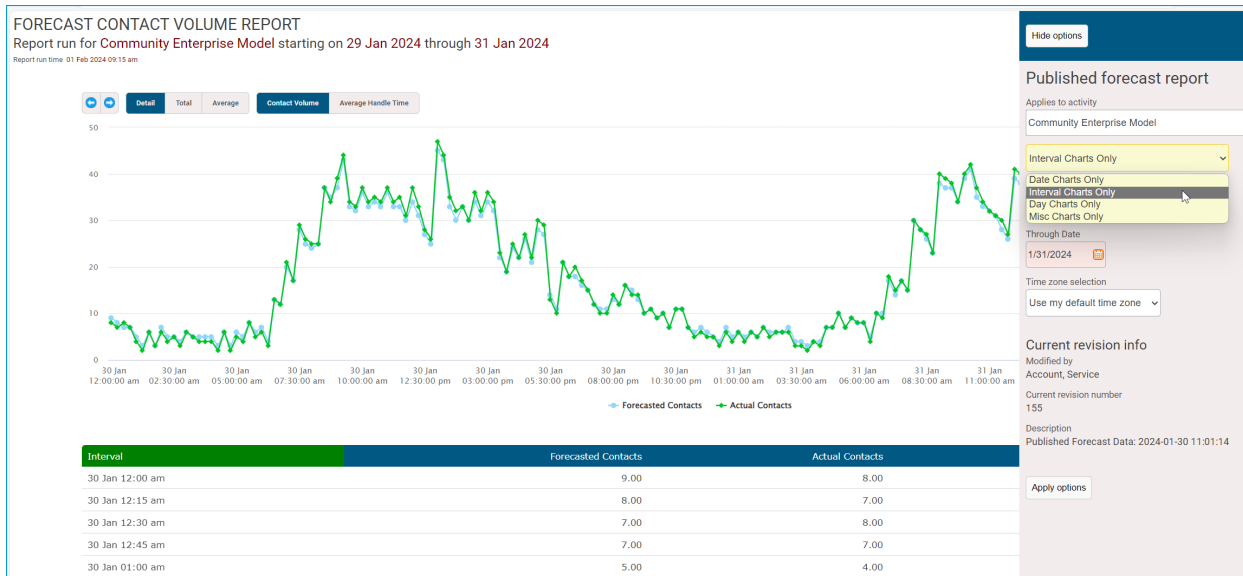
View your forecast with historical contact volume data and analyze your forecast accuracy.

Total Forecast Contacts by—

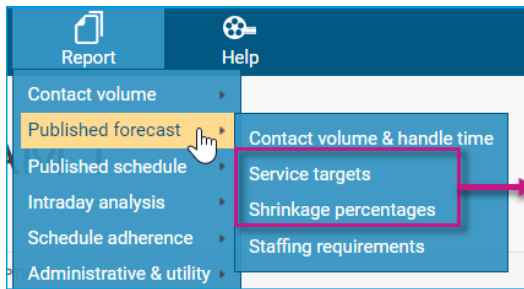
- ☐ Date
- ☐ Interval
- ☐ Day of Week
- ☐ Week
- ☐ Month
- ☐ Activity Type
- ☐ Media Type

Average Forecast Contacts by—

- ☐ Interval
- ☐ Day of Week
- ☐ Month



Service targets / Shrinkage percentages



These reports only include data if you make changes to the service target or shrinkage percentages section in a working forecast and then publish the forecast.



Staffing requirements

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

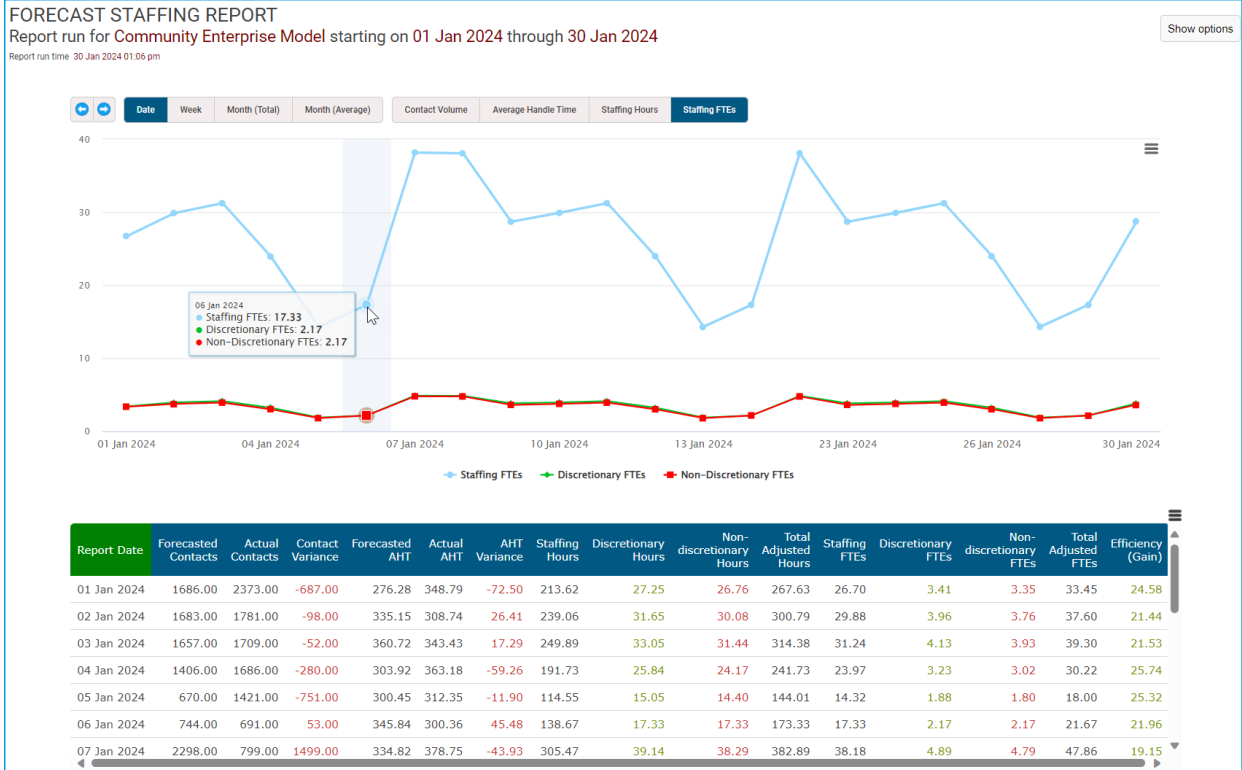
Enter a date range to see historical data by:

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

Use *Show options* to select:

- 👤 Date Charts Only
- 👤 Interval Charts Only (detail, total, average)
- 👤 Days Charts Only (total, average)
- 👤 Misc Charts Only (activity, media type)

Date Charts Only view





Published schedule

Use the published schedule reports to see published schedules for a date range and activity. At the Enterprise Model level, you can see your daily coverage by day and interval to see if you have enough staff to meet your service level, and even launch automated schedule adjustment plans (ASAPs). At all levels you can make edits to the published schedule).

Schedule details

View schedules for the Enterprise Model, a supervisor tree, or a custom user group.

Use the *Options* panel to select the date range and sorting type, with options to suppress or show agents with no schedule, include the event name in the interval display, and whether to enable notifications if you make changes to the published schedule.

Net-line staffing requirements

Use the Enterprise Model view to see the staffing requirements net-line statistics. Because forecasts are made at the activity level, the supervisor and custom user group views do not display the net-line statistics.



Schedule analysis

Schedule analysis includes four options:

1. Schedule analysis details

Filter for executive summary, contact volume, AHT, staffing, or service estimate. View data for each day in 15-minute intervals.



2. Schedule analysis weekly view

View a table with staffing requirements information in 15-minute intervals and columns for each day. This report is helpful for viewing a full week in one view.

PUBLISHED SCHEDULE ANALYSIS WEEKLY REPORT
Selected Activity: Community Enterprise Model starting on January 29, 2024 through February 4, 2024
Report run time: 01 Feb 2024 10:12 am

Interval	29 January 2024				30 January 2024				31 January 2024				01 February 2024				02 February 2024			
	Required	Scheduled	Variance	Service	Required	Scheduled	Variance	Service	Required	Scheduled	Variance	Service	Required	Scheduled	Variance	Service	Required	Scheduled	Variance	Service
12:00 am	0.00	2.00	2.00	80.00	5.01	4.00	-1.01	60.54	5.70	5.67	-0.03	79.74	6.11	4.00	-2.11	39.54	3.96	5.00	1.04	93.77
12:15 am	0.00	1.00	1.00	80.00	4.71	6.00	1.29	96.00	4.38	6.00	1.62	95.80	5.42	5.00	-0.42	81.18	3.40	3.00	-0.40	65.61
12:30 am	0.00	2.00	2.00	80.00	4.62	6.00	1.38	94.75	5.84	7.00	1.16	96.98	4.87	6.00	1.13	97.09	6.02	5.00	-1.02	80.78
12:45 am	0.00	2.00	2.00	80.00	5.38	6.00	0.62	91.15	3.95	7.00	3.05	99.41	3.60	6.00	2.40	99.26	4.71	5.00	0.29	92.92
01:00 am	0.00	2.00	2.00	80.00	4.12	6.00	1.88	97.65	5.67	5.00	-0.67	79.37	4.15	6.00	1.85	96.98	3.07	4.00	0.93	91.64
01:15 am	0.00	1.00	1.00	80.00	3.25	6.00	2.75	99.27	5.01	6.00	0.99	96.03	4.24	6.00	1.76	97.73	3.18	4.00	0.82	91.63
01:30 am	0.00	2.00	2.00	80.00	4.24	4.00	-0.24	79.46	5.02	5.00	-0.02	88.61	4.71	5.00	0.29	88.46	4.42	3.00	-1.42	43.08
01:45 am	0.00	2.00	2.00	80.00	2.77	4.00	1.23	90.78	4.81	4.00	-0.81	77.17	3.64	5.00	1.36	96.26	4.08	3.00	-1.08	56.53
02:00 am	0.00	3.00	3.00	80.00	4.88	3.00	-1.88	35.23	4.25	5.00	0.75	92.85	4.90	3.00	-1.90	39.44	5.05	1.00	-4.05	0.00
02:15 am	0.00	3.00	3.00	80.00	4.29	5.00	0.71	91.83	3.84	4.00	0.16	82.39	4.56	2.00	-2.56	0.00	3.62	1.00	-2.62	0.00
02:30 am	0.00	3.00	3.00	80.00	4.73	4.00	-0.73	71.69	3.95	5.00	1.05	94.89	3.26	3.00	-0.26	71.01	3.01	0.00	-3.01	0.00
02:45 am	0.00	3.00	3.00	80.00	4.34	4.00	-0.34	80.73	4.37	5.00	0.63	94.76	1.99	3.00	1.01	82.44	3.26	0.00	-3.26	0.00
03:00 am	0.00	3.00	3.00	80.00	5.12	4.00	-1.12	67.34	4.29	4.00	-0.29	73.11	3.36	3.00	-0.36	67.04	3.20	0.00	-3.20	0.00
03:15 am	0.00	3.00	3.00	80.00	4.62	4.00	-0.62	75.29	2.01	3.00	0.99	82.15	3.10	3.00	-0.10	77.49	2.03	0.00	-2.03	0.00
03:30 am	0.00	3.00	3.00	80.00	3.41	5.00	1.59	96.12	3.67	3.00	-0.67	67.69	5.61	4.00	-1.61	47.59	3.12	1.00	-2.12	0.00



3. Full service metric summary

View details for the week and totals for the individual days.

FULL SERVICE METRIC SUMMARY REPORT
 Selected Activity: **Community Enterprise Model**
 Report run time 07 Feb 2024 10:31 am

Community Enterprise Model		
Service Estimate	92%	05 Feb 92%
Service Target	80%	06 Feb 96%
Service Variance	+12%	07 Feb 98%
Forecasted Contacts	10460	08 Feb 97%
Forecasted AHT	337.26	09 Feb 89%
Staffing hours	1694.71	10 Feb 63%
Scheduled hours	2111.02	11 Feb 82%
Staffing Variance	416.31	
Staffing variance %	24.57	
View details		

Check the box to include leaf node activity results.

Site 1 - Dallas, TX			Billing			Customer Onboard Service			New Customer Sales		
Service Estimate	92%	12 Feb 93%	Service Estimate	89%	12 Feb 79%	Service Estimate	97%	12 Feb 99%	Service Estimate	95%	12 Feb 97%
Service Target	80%	13 Feb 96%	Service Target	80%	13 Feb 100%	Service Target	80%	13 Feb 100%	Service Target	80%	13 Feb 98%
Service Variance	+12%	14 Feb 98%	Service Variance	+9%	14 Feb 98%	Service Variance	+17%	14 Feb 100%	Service Variance	+15%	14 Feb 99%
Forecasted Contacts	10460	15 Feb 97%	Forecasted Contacts	4800	15 Feb 97%	Forecasted Contacts	705	15 Feb 100%	Forecasted Contacts	3715	15 Feb 99%
Forecasted AHT	337.26	16 Feb 89%	Forecasted AHT	399.45	16 Feb 91%	Forecasted AHT	171.86	16 Feb 98%	Forecasted AHT	142.77	16 Feb 97%
Staffing hours	1694.71	17 Feb 63%	Staffing hours	819.60	17 Feb 77%	Staffing hours	62.37	17 Feb 87%	Staffing hours	309.91	17 Feb 74%
Scheduled hours	2108.75	18 Feb 82%	Scheduled hours	1327.00	18 Feb 80%	Scheduled hours	1327.00	18 Feb 90%	Scheduled hours	1327.00	18 Feb 92%
Staffing Variance	414.04		Staffing Variance	507.40		Staffing Variance	1264.63		Staffing Variance	1017.09	
Staffing variance %	24.43		Staffing variance %	61.91		Staffing variance %	2027.67		Staffing variance %	328.19	
View details			View details			View details			View details		

Outbound			Sales Chat			Sales Email			Tier 1 support		
Service Estimate	0%	12 Feb 0%	Service Estimate	94%	12 Feb 100%	Service Estimate	83%	12 Feb 92%	Service Estimate	99%	12 Feb 100%
Service Target	0%	13 Feb 0%	Service Target	80%	13 Feb 99%	Service Target	80%	13 Feb 88%	Service Target	80%	13 Feb 100%
Service Variance	0%	14 Feb 0%	Service Variance	+14%	14 Feb 85%	Service Variance	+3%	14 Feb 95%	Service Variance	+19%	14 Feb 100%
Forecasted Contacts	0	15 Feb 0%	Forecasted Contacts	189	15 Feb 98%	Forecasted Contacts	718	15 Feb 82%	Forecasted Contacts	333	15 Feb 100%
Forecasted AHT	0.00	16 Feb 0%	Forecasted AHT	757.15	16 Feb 98%	Forecasted AHT	862.47	16 Feb 66%	Forecasted AHT	605.03	16 Feb 98%
Staffing hours	0.00	17 Feb 0%	Staffing hours	78.64	17 Feb 58%	Staffing hours	352.29	17 Feb 51%	Staffing hours	71.91	17 Feb 91%
Scheduled hours	46.75	18 Feb 0%	Scheduled hours	735.00	18 Feb 87%	Scheduled hours	735.00	18 Feb 76%	Scheduled hours	1327.00	18 Feb 100%
Staffing Variance	46.75		Staffing Variance	656.36		Staffing Variance	382.71		Staffing Variance	1255.09	
Staffing variance %	0.00		Staffing variance %	834.63		Staffing variance %	108.64		Staffing variance %	1745.39	
View details			View details			View details			View details		

Full Service Metric Summary Report

Specify the report parameters below and then press "Apply options" to produce the report.

Applies to activity
 Site 1 - Dallas, TX

Selected week
 2/12/2024

Forecast selection
 Use the published forecast

Forecast algorithm selection
 Skill-Based Forecasting Methods

Include leaf-node activity detail in addition to the selected activity summary

Restrict the scope of the report to the activity's configured work habits and hours

Time zone selection
 Use my default time zone

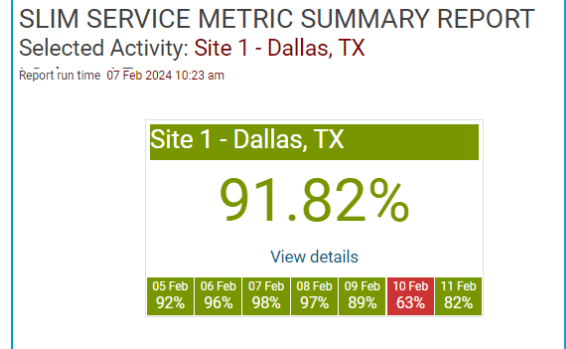
[Apply options](#)



4. Compact service metric summary

View totals for the week and each day.

Report options include a checkbox to view by leaf node activity.



Schedule analysis comparison report

Within a published schedule > *Agent schedules by activity* there is an option to view subordinate activities by interval that allows comparing service level at each interval by 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.

Published Schedule Summary Report							
Applies to Activity: Site 1 - Dallas, TX []							
From: Monday, 05 February 2024 Through Sunday, 11 February 2024							
Using Time Zone: (GMT-06:00) Central Time (US & Canada)							
Agent Name	Monday 05 Feb 2024	Tuesday 06 Feb 2024	Wednesday 07 Feb 2024	Thursday 08 Feb 2024	Friday 09 Feb 2024	Saturday 10 Feb 2024	Sunday 11 Feb 2024
Areheart, Sam			09:00 AM-08:00 PM				
Azzarito, Deborah	12:00 PM-08:30 PM	12:00 PM-08:30 PM		12:00 PM-08:30 PM	12:00 PM-08:45 PM	12:00 PM-08:45 PM	
Badgett, Gregory	03:00 PM-00:00 AM	03:00 PM-00:00 AM	03:00 PM-00:00 AM	03:00 PM-00:00 AM	08:00 AM-12:00 PM	09:00 AM-02:00 PM	03:00 PM-00:00 AM
Barton, Jean	08:00 AM-05:00 PM	08:00 AM-05:00 PM	08:00 AM-05:00 PM	08:00 AM-05:00 PM			08:00 AM-05:30 PM
Bickley, Sharon	11:00 AM-03:00 PM	11:00 PM-01:00 AM 01:15 AM-03:00 AM 04:00 AM-08:00 AM	01:00 AM-01:15 AM 03:00 AM-04:00 AM 06:00 AM-06:15 AM 11:00 PM-01:00 AM 01:15 AM-02:30 AM 03:30 AM-08:00 AM	01:00 AM-01:15 AM 02:30 AM-03:30 AM 06:00 AM-06:15 AM 11:00 PM-01:00 AM 01:15 AM-02:45 AM 03:45 AM-08:00 AM	01:00 AM-01:15 AM 02:45 AM-03:45 AM 05:30 AM-05:45 AM 11:00 PM-01:00 AM 01:15 AM-03:00 AM 04:00 AM-08:00 AM	01:00 AM-01:15 AM 03:00 AM-04:00 AM 06:00 AM-06:15 AM 11:00 PM-01:00 AM 01:15 AM-02:30 AM 03:30 AM-08:00 AM	01:00 AM-01:15 AM 02:30 AM-06:00 AM
Blakely, Latrice	09:00 AM-06:30 PM	09:00 AM-05:30 PM	09:00 AM-06:30 PM	09:00 AM-06:30 PM	09:00 AM-05:30 PM		
Brown, Chanell	11:00 AM-08:00 PM	11:00 AM-08:00 PM	11:00 AM-08:00 PM	11:00 AM-08:00 PM		02:00 PM-10:00 PM	
Burns, Barbara	10:00 AM-02:15 PM	10:00 AM-02:15 PM	10:00 AM-02:15 PM	10:00 AM-02:15 PM			
Carabo, Randy	09:00 AM-07:00 PM		09:00 AM-07:00 PM		09:00 AM-07:00 PM	01:00 PM-06:00 PM	
Cassleman, Sherry	00:15 AM-00:00 AM 00:15 AM-02:00 AM	00:00 AM-00:15 AM 00:30 AM-02:00 AM	00:15 AM-00:15 AM 00:30 AM-02:00 AM	00:15 AM-00:15 AM 00:30 AM-02:00 AM	00:15 AM-10:00 PM	08:00 AM-12:00 PM	05:00 PM-00:15 AM 00:30 AM-02:00 AM
Cathy, Kelly	07:00 AM-04:00 PM	07:00 AM-04:00 PM	07:00 AM-04:00 PM	07:00 AM-04:00 PM			07:00 AM-04:00 PM
Crislip, Traci	08:00 PM-00:00 AM	04:00 PM-01:00 AM	04:00 PM-11:45 PM	08:00 AM-04:00 PM	04:00 PM-01:00 AM	04:00 PM-01:00 AM	07:00 PM-00:00 AM
Dunbar, Bill	08:00 AM-05:00 PM	06:05 PM-10:00 PM	08:00 PM-11:45 PM	00:15 AM-04:00 AM 06:00 PM-02:00 AM	10:00 PM-00:00 AM		08:00 AM-05:00 PM
Duncan, Matthew	11:00 AM-08:00 PM	11:00 AM-08:00 PM	11:00 AM-08:00 PM	11:00 AM-08:00 PM			11:00 AM-08:30 PM
Dyer, Amanda	09:30 AM-06:00 PM	09:30 AM-06:00 PM	12:00 PM-08:30 PM		09:30 AM-06:00 PM		
Finn, Mike	04:00 PM-00:00 AM	04:00 PM-00:00 AM	04:00 PM-00:00 AM	04:00 PM-00:00 AM	04:00 PM-00:00 AM		



Schedule details (printer)

Select an activity and start date, then select whether to include off-site events (such as PTO). Returns details of schedules for the schedule week sorted by agent in a printer-friendly format. The report opens in a new browser window – ready for printing.

Applies to activity
 Site 1 - Dallas, TX

From date
 2/5/2024

Include off-site events in paid reports?
 Include off-site events in paid hours

Time zone selection
 Use my default time zone

[Generate report](#)

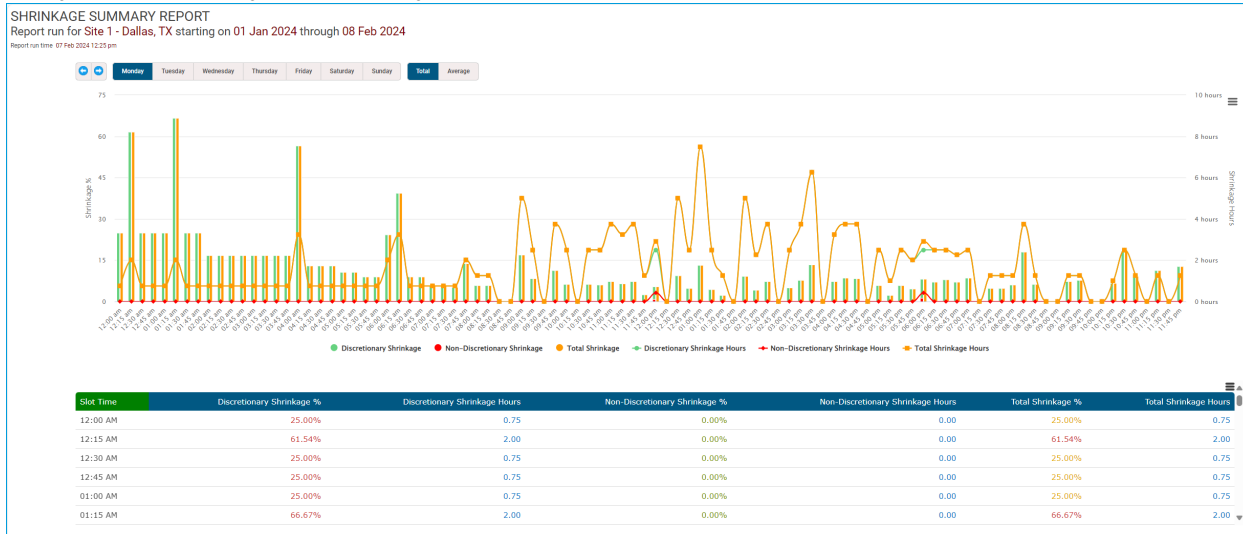
Schedule Date	Start Time	End Time	Type	Duration (In Hours)	Description
Published Schedule Detail Report Applies to Activity: Site 1 - Dallas, TX [] From: Monday, 05 February 2024 Through: Sunday, 11 February 2024 Using Time Zone: (GMT-06:00) Central Time (US & Canada) Wednesday, 07 Feb 2024 11:19:02 AM Account, Service					
Areheart, Sam					
Monday, February 05, 2024 No Schedule Intervals					
Tuesday, February 06, 2024 No Schedule Intervals					
Wednesday, February 07, 2024					
Wednesday, 07 February 2024	9:00:00 AM	10:45:00 AM	Work	1.75	Scheduled Work
Wednesday, 07 February 2024	10:45:00 AM	11:00:00 AM	Break	0.25	Off phone interval
Wednesday, 07 February 2024	11:00:00 AM	12:45:00 PM	Work	1.75	Scheduled Work
Wednesday, 07 February 2024	12:45:00 PM	1:45:00 PM	Lunch	1.00	Off phone interval
Wednesday, 07 February 2024	1:45:00 PM	3:45:00 PM	Work	2.00	Scheduled Work
Wednesday, 07 February 2024	3:45:00 PM	4:00:00 PM	Break	0.25	Off phone interval
Wednesday, 07 February 2024	4:00:00 PM	5:45:00 PM	Work	1.75	Scheduled Work
Wednesday, 07 February 2024	5:45:00 PM	6:00:00 PM	Break	0.25	Off phone interval
Wednesday, 07 February 2024	6:00:00 PM	8:00:00 PM	Work	2.00	Scheduled Work
Thursday, February 08, 2024 No Schedule Intervals					
Friday, February 09, 2024 No Schedule Intervals					
Saturday, February 10, 2024 No Schedule Intervals					
Sunday, February 11, 2024 No Schedule Intervals					



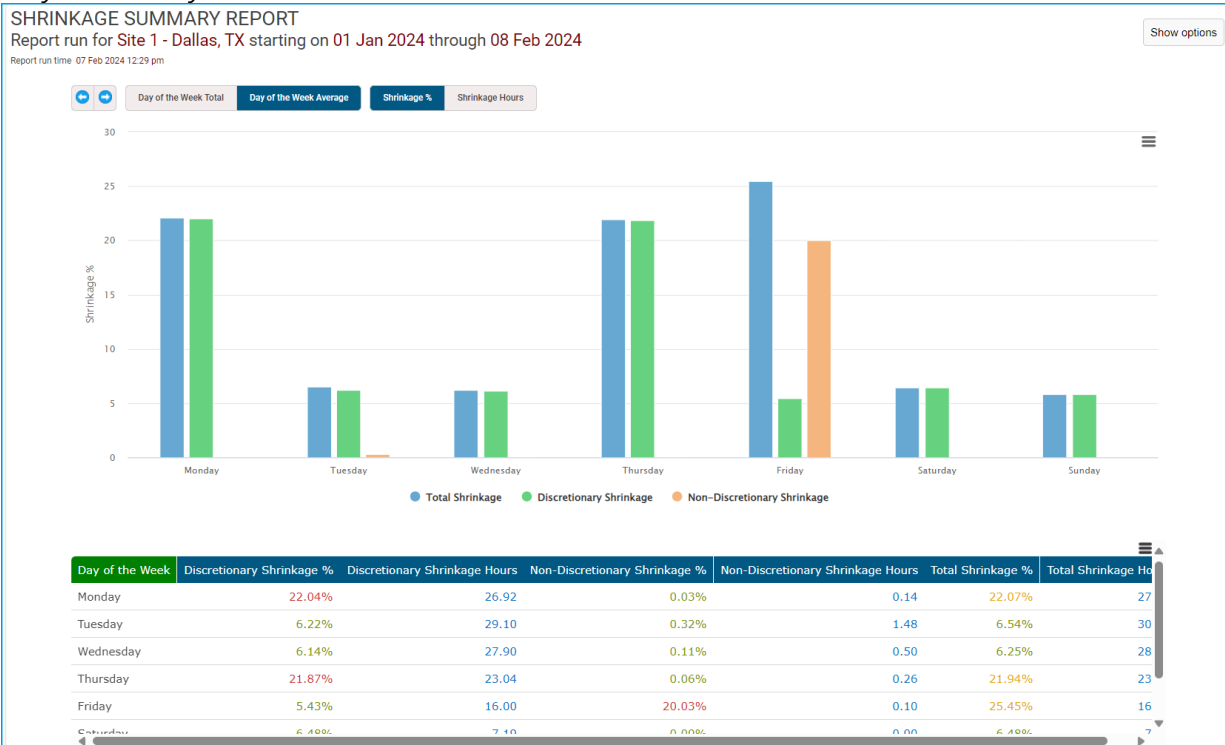
Shrinkage report

Use the published schedule shrinkage reports 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.

Day of the week by interval only.



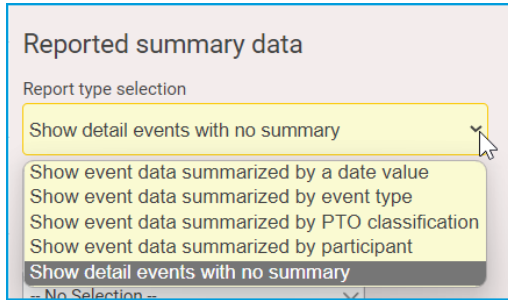
Day charts only



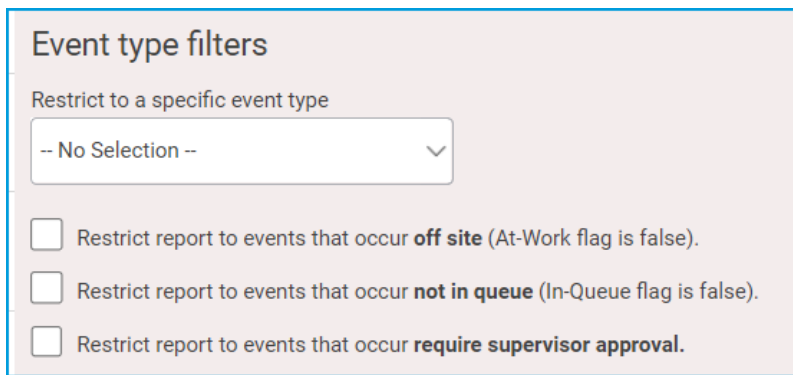


Published event summary

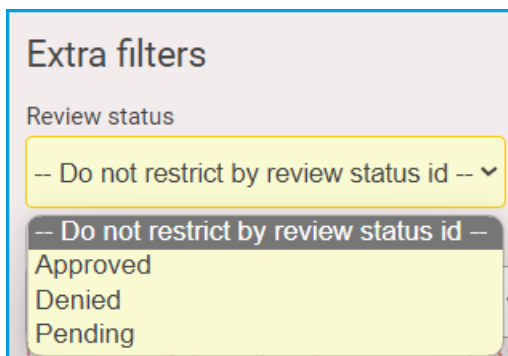
The published event summary report includes a wealth of information and includes many filtering options. If selecting a date range of fewer than 90 days, details are available. When sorted for details, this is where you can approve, deny, revalidate, or remove time off requests. The *Options* panel allows filtering by date, event type, PTO classification, participant, or showing all.



Event type filters allow selecting specific events or restricting to PTO events.



You can further refine the report for only approved, denied, or pending events.





When viewing event details (*Show event details* filter), you can delete, approve, deny, or validate future time off requests in the report. You cannot delete or edit past events here.

Published schedule event summary report by Activity Site 1 - Dallas, TX
 Report from 01 Feb 2024 through 16 Feb 2024
 Report run time: 07 Feb 2024 12:58 pm

[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					
Areheart, Sam	PTO	06 Feb 2024	06 Feb 2024	N/A	N/A	8.00	8.00	Approved	c	05 Jan 2024 07:15 am					
Burns, Barbara	PTO	06 Feb 2024	06 Feb 2024	N/A	N/A	8.00	8.00	Denied	2nd	05 Jan 2024 07:18 am					
Barton, Jean	LOA	06 Feb 2024	06 Feb 2024	02:00 pm	06:00 pm	4.00	4.00	Pending	Need every Mon and Tues afternoon off.	17 Jan 2024 07:34 am					
Burns, Barbara	PTO	12 Feb 2024	14 Feb 2024	N/A	N/A	24.00	8.00	Approved	PTO comments	05 Jan 2024 01:13 pm					
Barton, Jean	LOA	12 Feb 2024	12 Feb 2024	02:00 pm	06:00 pm	4.00	4.00	Pending	Need every Mon and Tues afternoon off.	17 Jan 2024 07:34 am					
Barton, Jean	LOA	13 Feb 2024	13 Feb 2024	02:00 pm	06:00 pm	4.00	4.00	Pending	Need every Mon and Tues afternoon off.	17 Jan 2024 07:34 am					



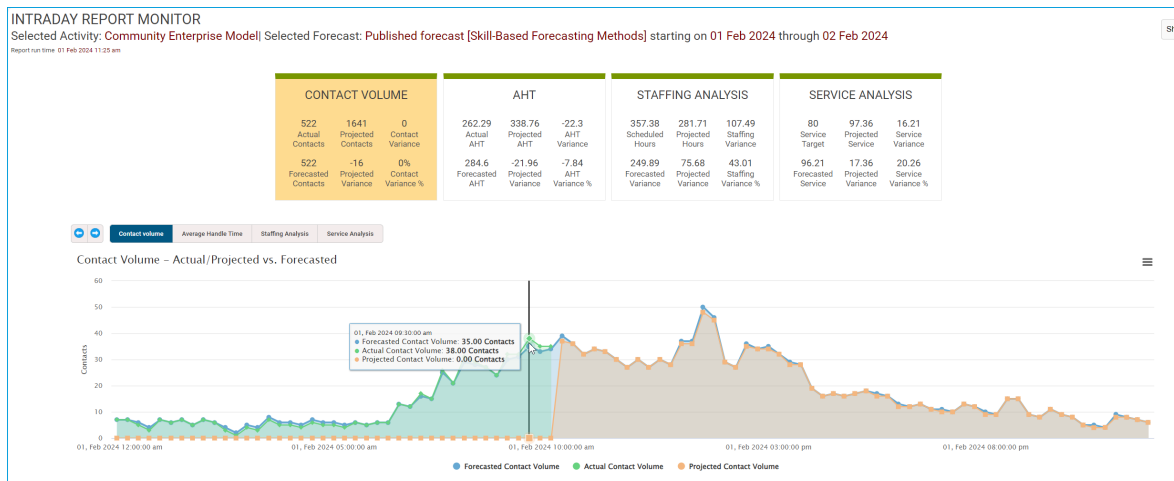
Intraday analysis

These reports include the intraday performance monitor and schedule analytics. These reports 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

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.

The top of the report includes a summary and graph with filtering options for contact volume, AHT, staffing, and service. It shows today's past performance and projections for the remainder of the day and allows seeing the forecasted, actual, and projected staffing requirements.



Scroll down to the table to see each interval forecasted vs actuals, and the re-projected contacts, based on the actuals for the day.

INTRADAY REPORT MONITOR
 Selected Activity: Site 1 - Dallas, TX | Selected Forecast: Published forecast [Skill-Based Forecasting Methods] starting on 07 Feb 2024 through 08 Feb 2024
 Report run time: 07 Feb 2024 01:11 pm

Report Date	Forecasted Contacts	Actual Contacts	Contact Variance	Contact Variance %	Projected Contacts
07 Feb 10:45 am	34.00	34.00	0.00	0.00	0.00 ✓
07 Feb 11:00 am	32.00	32.00	0.00	0.00	0.00 ✓
07 Feb 11:15 am	31.00	31.00	0.00	0.00	0.00 ✓
07 Feb 11:30 am	30.00	30.00	0.00	0.00	0.00 ✓
07 Feb 11:45 am	27.00	27.00	0.00	0.00	0.00 ✓
07 Feb 12:00 pm	41.00				40.00 ✓
07 Feb 12:15 pm	40.00				40.00
07 Feb 12:30 pm	33.00				32.00
07 Feb 12:45 pm	30.00				30.00
07 Feb 01:00 pm	39.00				39.00
07 Feb 01:15 pm	36.00				36.00
07 Feb 01:30 pm	35.00				35.00
07 Feb 01:45 pm	29.00				29.00
07 Feb 02:00 pm	36.00				36.00



Schedule analytics

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

Includes forecasted, projected, and observed (for today's reports).

Schedule analytics

Current
Hourly
Today
Tomorrow
This week

Key performance metrics for the current interval

Forecasted interval data for Community Enterprise Model
Wednesday, 07 February 2024 01:15:00 pm - Published forecast

Service estimate	Staffing	Contacts	AHT
100%	+8	36	402
Target service: 80% Service variance: +20%	Staff required: 24 Staff scheduled: 32		

Projected interval data for Community Enterprise Model

Service estimate	Staffing	Contacts	AHT
0%	0	0	-
Target service: 80% Service variance: -80%	Projected requirements: 0 Staff scheduled: 32	Projected variance: 0	Projected variance: -

Observed interval data for Community Enterprise Model
Wednesday, 07 February 2024 01:00:00 pm

Service estimate	Staffing	Contacts	AHT
0%	-1	null	0
Target service: 80% Service variance: -80%	Staff required: 28 Staff scheduled: 27	Forecasted contacts: 39 Actual contacts:	Forecasted AHT: 457 Actual AHT: 0



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.

The panel on the right includes a summary of device states.

Schedule Adherence Alerts Report
Applies to Activity: Site 1 - Dallas, TX []

Agent Adherence Alerts as of Monday, 12 February 2024 07:19:45
Using Time Zone: (GMT-06:00) Central Time (US & Canada)

Account, Service

Agents: 3

Minutes: 10% In Adherence 90%

18

10

Barton, Jean

Sales/Service Rep

Scheduled event: Late

Scheduled time: 10:00 PM

Actual state: gone home
Gone Home

Start time: 05:26 PM

Adherence violation: 09:20

Agent login: ladhikari

Blakely, Latrice

Sales/Service Rep

Scheduled event: Late

Scheduled time: 07:00 AM

Actual state: gone home
Gone Home

Start time: 02:04 PM

Adherence violation: 00:20

Agent login: raoshana

Burns, Barbara

Sales/Service Rep

Scheduled event: Late

Scheduled time: 07:00 AM

Actual state: gone home
Gone Home

Start time: 02:04 PM

Adherence violation: 00:20

Agent login: fbarrezueta

Carabo, Randy

Sales/Service Rep

Scheduled event: Work

Scheduled time: 07:00 AM

Actual state: gone home
Gone Home

Start time: 02:04 PM

Adherence violation: 00:20

Agent login: kbazaldua

State	Agents	Percent
[UNKNOWN]	6	30.00 %
available	2	10.00 %
gone home	12	60.00 %

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.

This report includes the option to restrict to an individual agent's name.

Schedule Adherence Report
Applies to Activity: Site 1 - Dallas, TX []

From: Thursday, 01 February 2024 Through: Wednesday, 07 February 2024
Using Time Zone: (GMT-06:00) Central Time (US & Canada)

Wednesday, 07 Feb 2024 01:41:49 PM 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
27088.00	1906.45	1512.07	394.38	79.31 %	325.90	269.23	56.67	82.61 %	2232.35	451.05	79.79 %	64.71

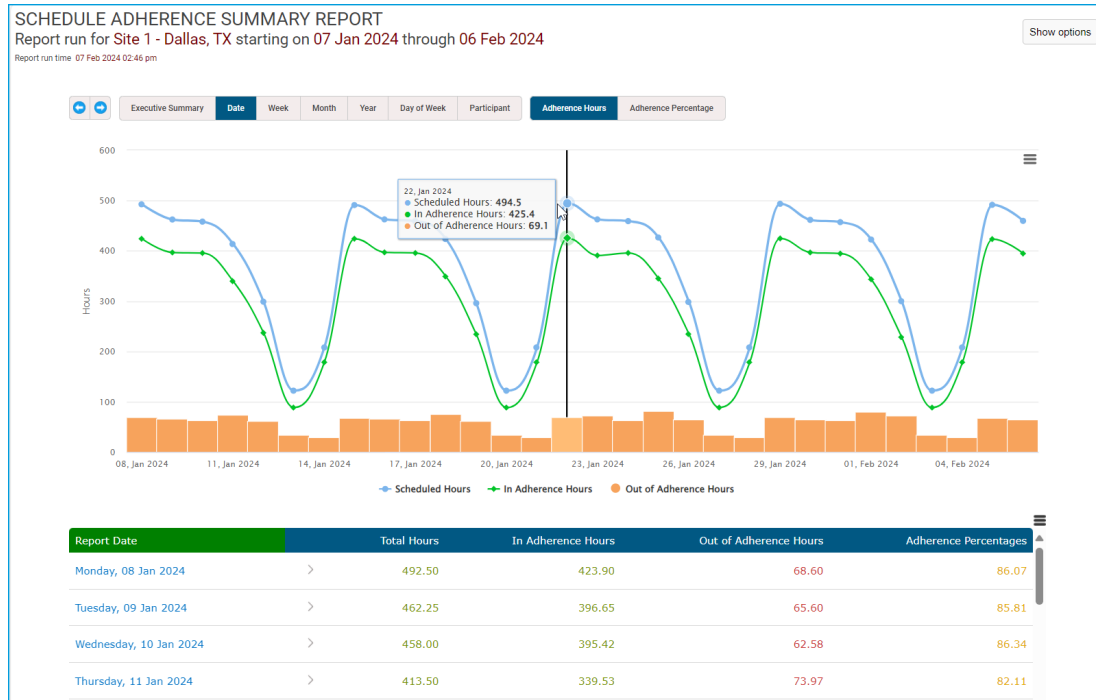
Areheart, Sam

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
Monday, 05 February 2024	85	0.00	0.00	0.00	0.00 %	8.00	8.00	0.00	100.00 %	8.00	0.00	100.00 %	9.17
Tuesday, 06 February 2024	71	0.00	0.00	0.00	0.00 %	8.00	8.00	0.00	100.00 %	8.00	0.00	100.00 %	9.13
Wednesday, 07 February 2024	86	3.50	3.25	0.25	92.86 %	1.20	1.17	0.03	97.22 %	4.70	0.28	93.97 %	0.00
Subtotal:	242.00	3.50	3.25	0.25	92.86 %	17.20	17.17	0.03	99.83 %	20.70	0.28	98.65 %	18.30



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 detail report

Shows all of the states each agent has been in on a given date. Can filter by employee classification, data source, or agent name.

Agent State Transaction Report
 Applies to Activity: Site 1 - Dallas, TX []
 Report Date: Thursday, 01 February 2024
 Using Time Zone: (GMT-06:00) Central Time (US & Canada)
 Monday, 12 Feb 2024 07:52:54 AM Account Service

Areheart, Sam habdulrahim [0]
 No Transactions Found

Azzarito, Deborah mabelend [117]

State Name	Description	State ID	Transaction Start	Transaction End	Duration (Hours:Minutes:Seconds)	In Queue
gone home	Gone Home	3	01 Feb 2024 11:48:48 AM	01 Feb 2024 12:01:15 PM	00:12:27	False
available	Available	2	01 Feb 2024 12:01:15 PM	01 Feb 2024 12:01:39 PM	00:00:24	True
acd call	On ACD Call	2	01 Feb 2024 12:01:39 PM	01 Feb 2024 12:24:12 PM	00:22:33	True
follow up	Follow Up	2	01 Feb 2024 12:24:12 PM	01 Feb 2024 12:24:17 PM	00:00:05	True
follow up - extended	Follow Up - Extended	2	01 Feb 2024 12:24:17 PM	01 Feb 2024 12:27:27 PM	00:03:10	True
available	Available	2	01 Feb 2024 12:27:27 PM	01 Feb 2024 12:28:01 PM	00:00:34	True
acd call	On ACD Call	2	01 Feb 2024 12:28:01 PM	01 Feb 2024 12:28:33 PM	00:00:32	True
follow up	Follow Up	2	01 Feb 2024 12:28:33 PM	01 Feb 2024 12:28:42 PM	00:00:09	True
follow up - extended	Follow Up - Extended	2	01 Feb 2024 12:28:42 PM	01 Feb 2024 12:35:31 PM	00:06:49	True
available	Available	2	01 Feb 2024 12:35:31 PM	01 Feb 2024 12:36:14 PM	00:00:43	True
acd call	On ACD Call	2	01 Feb 2024 12:36:14 PM	01 Feb 2024 12:40:17 PM	00:04:03	True
follow up	Follow Up	2	01 Feb 2024 12:40:17 PM	01 Feb 2024 12:40:21 PM	00:00:04	True
follow up - extended	Follow Up - Extended	2	01 Feb 2024 12:40:21 PM	01 Feb 2024 12:43:29 PM	00:03:08	True
available	Available	2	01 Feb 2024 12:43:29 PM	01 Feb 2024 12:43:32 PM	00:00:03	True
acd call	On ACD Call	2	01 Feb 2024 12:43:32 PM	01 Feb 2024 01:12:42 PM	00:29:10	True
follow up	Follow Up	2	01 Feb 2024 01:12:42 PM	01 Feb 2024 01:12:47 PM	00:00:05	True



Daily paid time


Shows total number of hours of paid and unpaid events for each agent. Can filter report by agent name and export is available at the agent level.

Historical Actual Paid Time Report

Applies to Activity: Site 1 - Dallas, TX []

From: Monday, 22 January 2024 Through: Sunday, 28 January 2024
Using Time Zone: (GMT-06:00) Central Time (US & Canada)

Thursday, 08 Feb 2024 05:44:12 AM Account, Service



Azzarito, Deborah Scheduled Actual

Paid:	39.50	34.56	
Unpaid:	3.50	1.96	
Overage:	-	0.43	

Schedule Date	Scheduled Paid	Actual Paid	Scheduled Unpaid	Actual Unpaid	Non Scheduled / In Queue Hours
Monday, 22 January 2024	7.50	7.15	1.00	0.50	0.08
Tuesday, 23 January 2024	7.50	5.68	1.00	0.98	0.02
Thursday, 25 January 2024	8.00	7.33	0.50	0.38	0.07
Friday, 26 January 2024	8.25	7.15	0.50	0.00	0.08
Saturday, 27 January 2024	8.25	7.25	0.50	0.10	0.18



Badgett, Gregory Scheduled Actual

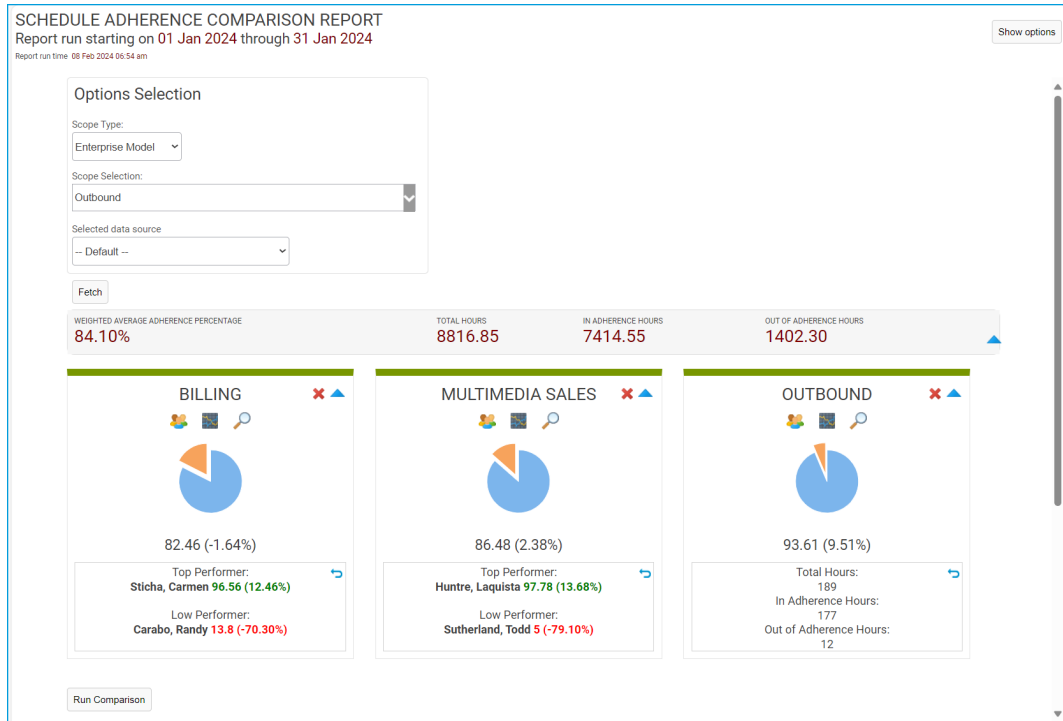
Paid:	52.00	43.75	
Unpaid:	5.00	4.85	
Overage:	-	0.27	

Schedule Date	Scheduled Paid	Actual Paid	Scheduled Unpaid	Actual Unpaid	Non Scheduled / In Queue Hours
Monday, 22 January 2024	8.00	7.32	1.00	1.00	0.02
Tuesday, 23 January 2024	8.00	7.00	1.00	1.00	0.05
Wednesday, 24 January 2024	8.00	7.03	1.00	0.98	0.00
Thursday, 25 January 2024	11.00	7.17	1.00	0.87	0.17
Friday, 26 January 2024	4.00	3.55	0.00	0.00	0.00
Saturday, 27 January 2024	5.00	4.55	0.00	0.00	0.03
Sunday, 28 January 2024	8.00	7.13	1.00	1.00	0.00

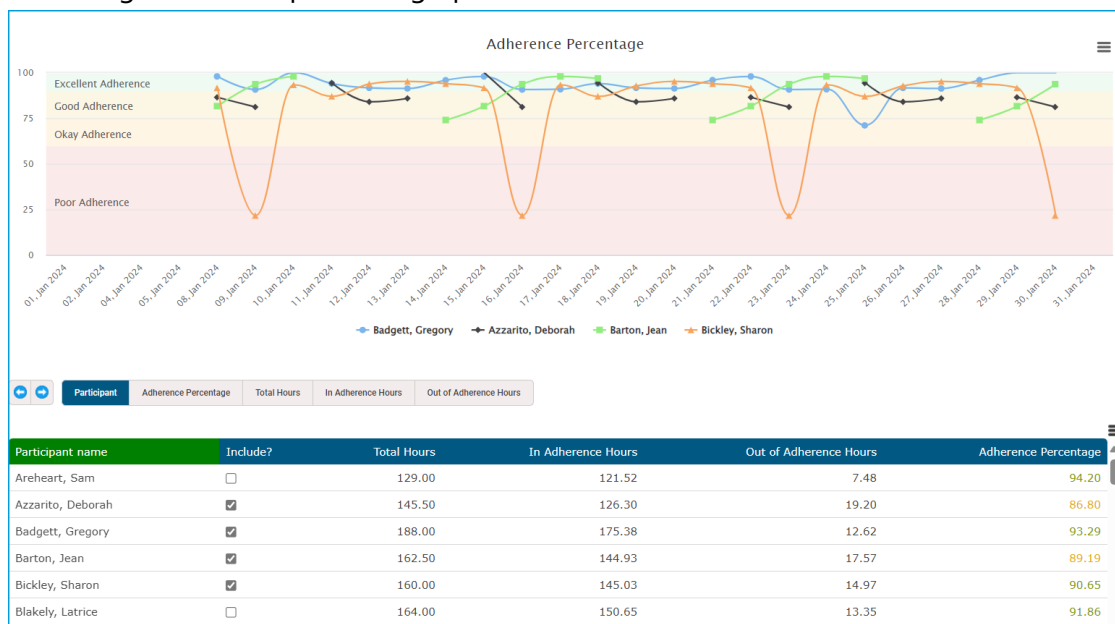


Schedule adherence comparison

Using the summary adherence data, the comparison report allows selecting up to five people or groups ("scopes") to compare schedule adherence for a specified date range. From an executive summary to individual details, see the top and low performers for each group, trends, in and out of adherence hours, etc.



Select individual agents to compare in a graph.






Administrative & utility

Administrative & utility

Show reports useful for system administration and troubleshooting.

Application exceptions


Review application error logs to help troubleshoot any system errors that users report.



Show the application error report.

Data source logins


Review the current logins for your people for each data source you have defined in the system.



Show the data source login report.

Database health and statistics


Database health and statistics



Review database health and statistics.

Event Review Status Change


Event review status



Show the event review status change report.

Change audit log


Show changes to key system elements for a variety of triggering events, like new items or updated values.



Review the change audit log.

Data targets


Configure data export services to create scheduled reports delivered to a remote location.



Set up your data targets.

User Logon Report

User Logon Report



Show the user login report.

Application exceptions

This can be helpful when troubleshooting errors.

Application Error Report					
Thursday, 08 Feb 2024 06:06:39 AM Cotharin, Todd					
Id	Date	User	Source	Target	Error Message
44	02 February 2024 07:06:34 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Forecast/ServiceMetrics/GenerateF	Object reference not set to an instance of an object.
43	02 February 2024 07:04:56 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Forecast/ServiceMetrics/GenerateF	Object reference not set to an instance of an object.
42	02 February 2024 07:04:12 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Forecast/ServiceMetrics/GenerateF	Object reference not set to an instance of an object.
36	31 January 2024 06:51:52 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Forecast/ServiceMetrics/GenerateF	Object reference not set to an instance of an object.
35	31 January 2024 06:51:31 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Forecast/ServiceMetrics/GenerateF	Object reference not set to an instance of an object.
26	23 January 2024 10:03:58 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Forecast/ServiceMetrics/GenerateF	Object reference not set to an instance of an object.
25	17 January 2024 06:27:22 AM	Account, Service	System.Web	/CommunityWeb/ExportServerAPI_1_1_0.aspx	Maximum request length exceeded.
24	17 January 2024 06:27:18 AM	Account, Service	System.Web	/CommunityWeb/ExportServerAPI_1_1_0.aspx	Maximum request length exceeded.
21	12 December 2023 10:36:22 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Adherence/AdherenceAlertsByUserGr	Object reference not set to an instance of an object.
20	12 December 2023 10:36:08 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Adherence/AdherenceAlertsByUserGr	Object reference not set to an instance of an object.
19	11 December 2023 10:40:02 AM	Account, Service	WFMSG.Products.Community.UI.Web	/CommunityWeb/UI/Adherence/AdherenceAlertsByUserGr	Object reference not set to an instance of an object.
18	29 November 2023 01:27:03 PM	Non-HTTP Exception	CommunityWebApi	Non-HTTP Exception	Object reference not set to an instance of an object.
17	29 November 2023 01:26:57 PM	Non-HTTP Exception	CommunityWebApi	Non-HTTP Exception	Object reference not set to an instance of an object.



Data source logins

Quickly view agents without data source logins, those without a default data source, and the default data source for all agents. The table also includes the Employee ID, hire date, login ID, and assigned supervisor.

Agent Data Source Login Report
Thursday, 08 Feb 2024 06:12:35 AM Cotharin, Todd

Agents with no data source logins

Agent Id	Agent Name	Employee Id	Hire Date	Title	Supervisor
541	Bodine, Cathi		01 March 2021		

Agents with no Default Data Source Login

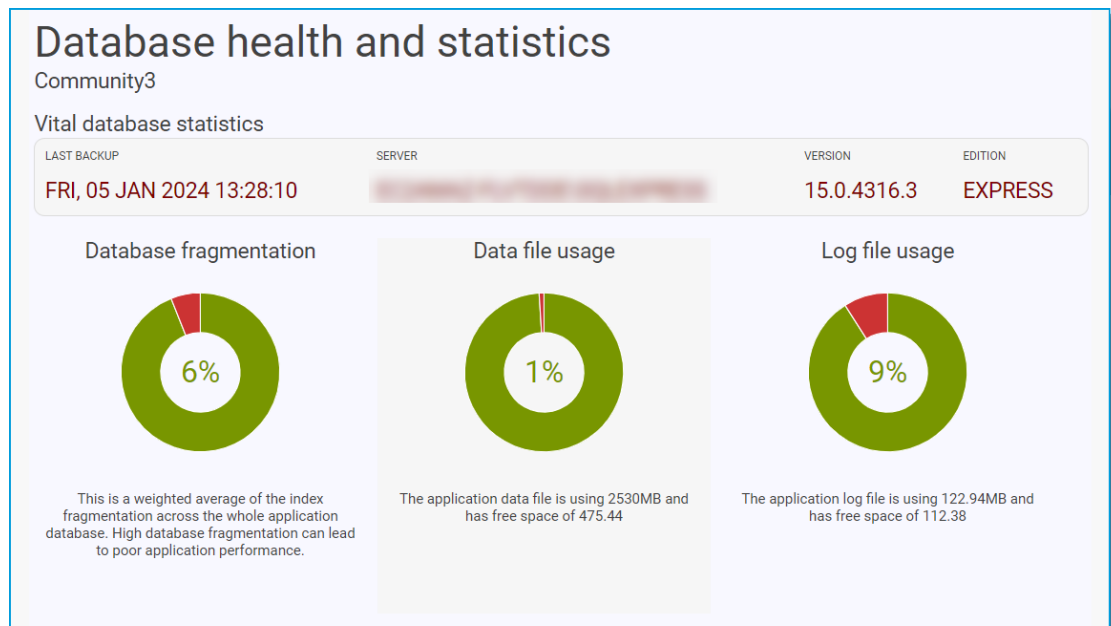
Agent Id	Agent Name	Employee Id	Hire Date	Title	Supervisor
332	Dolinger, Joel	JND21026	14 November 2016	Sales/Service Rep	Wingard, Jason
432	Dunbar, Bill	wdunbar	15 May 2017	Sales/Service Rep	Blair, Travis

Default agent login report

Agent Id	Agent Name	Employee Id	Hire Date	Title	Default Data Source Type	Default Data Source Name	Login Id	Supervisor
278	Areheart, Sam	SCA21218	11 July 2016	Sales/Service Rep	I3	Community Cloud Connect	habdulrahim	Mitchell, Lauren
156	Azzarito, Deborah	dka21094	21 September 2015	Sales/Service Rep	I3	Community Cloud Connect	mabelend	Wildrick, Brian
453	Badgett, Gregory	GAB21254	12 June 2017	Sales/Service Rep	I3	Community Cloud Connect	dadend	Mitchell, Lauren
451	Barton, Jean	JBarton	12 June 2017	Sales/Service Rep	I3	Community Cloud Connect	ladhikari	Blair, Travis
479	Bickley, Sharon	SBickley	10 July 2017	Sales/Service Rep	I3	Community Cloud Connect	mrawahneh	Mitchell, Lauren
411	Bixler, Lyon	lbixler	15 May 2017	Sales/Service Rep	I3	Community Cloud Connect	malmansa	Munoz, Maria
27	Blakey, Latrice	LNB21249	01 December 2014	Sales/Service Rep	I3	Community Cloud Connect	raoshana	Nixon, Jacqui
467	Brown, Chanell	cab17889	12 June 2017	Sales/Service Rep	I3	Community Cloud Connect	jarevalorivers	Blair, Travis

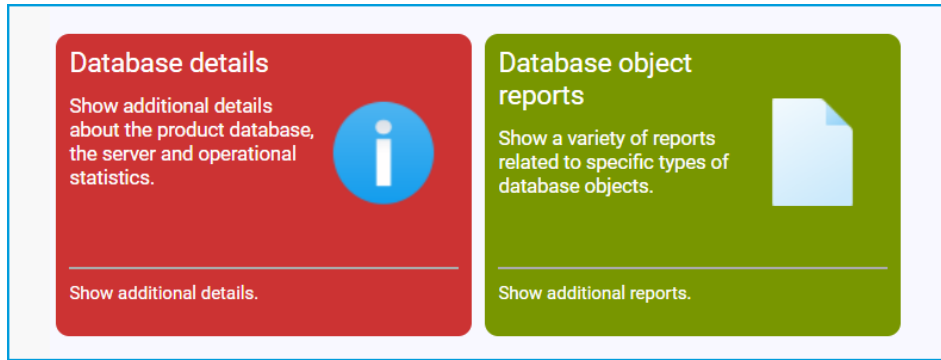
Database health and statistics

This report can be helpful when troubleshooting performance issues.





Additional options are available below the charts.



Database details

Includes options for server information, backup details, and object counts (useful for verifying the integrity of the database).

Database object reports

Includes options for table size, index size, index fragmentation, and command log.



Event review status change

A list of event changes, such as approved and denied events. You can run the report by agent, supervisor, review status (approved, denied, pending), a single event type, or event classification. For example, see a list of all PTO requests and their status for a month.

Event status report					
01 Jan 2024 through 31 Jarday, 08 Feb 2024 08:57 AM					
Name	Review Status	Reviewed by	Reviewed on	Event date	Event type
Badgett, Gregory	Approved	Account, Service	Thursday, 04 Jan 2024	Monday, 29 Jan 2024 12:00 AM	PTO
Badgett, Gregory	Approved	Account, Service	Thursday, 04 Jan 2024	Tuesday, 30 Jan 2024 12:00 AM	PTO
Badgett, Gregory	Approved	Account, Service	Thursday, 04 Jan 2024	Wednesday, 31 Jan 2024 12:00 AM	PTO
Barton, Jean	Approved	Account, Service	Thursday, 04 Jan 2024	Friday, 12 Jan 2024 12:00 AM	PTO
Burns, Barbara	Approved	Account, Service	Friday, 05 Jan 2024	Thursday, 04 Jan 2024 12:00 AM	PTO
Burns, Barbara	Approved	Account, Service	Friday, 05 Jan 2024	Friday, 05 Jan 2024 12:00 AM	PTO
Burns, Barbara	Approved	Account, Service	Friday, 05 Jan 2024	Monday, 12 Feb 2024 12:00 AM	PTO
Burns, Barbara	Approved	Account, Service	Friday, 05 Jan 2024	Tuesday, 13 Feb 2024 12:00 AM	PTO
Burns, Barbara	Approved	Account, Service	Friday, 05 Jan 2024	Wednesday, 14 Feb 2024 12:00 AM	PTO
Burns, Barbara	Approved	Account, Service	Friday, 05 Jan 2024	Tuesday, 20 Feb 2024 12:00 AM	PTO
Burns, Barbara	Approved	Account, Service	Friday, 05 Jan 2024	Wednesday, 21 Feb 2024 12:00 AM	PTO
Bickley, Sharon	Approved	Account, Service	Friday, 05 Jan 2024	Thursday, 01 Feb 2024 12:00 AM	PTO
Bickley, Sharon	Approved	Account, Service	Friday, 05 Jan 2024	Friday, 02 Feb 2024 12:00 AM	PTO
Areheart, Sam	Approved	Account, Service	Friday, 05 Jan 2024	Monday, 05 Feb 2024 12:00 AM	PTO
Areheart, Sam	Approved	Account, Service	Friday, 05 Jan 2024	Tuesday, 06 Feb 2024 12:00 AM	PTO
Burns, Barbara	Denied	Account, Service	Friday, 05 Jan 2024	Monday, 05 Feb 2024 12:00 AM	PTO
Burns, Barbara	Denied	Account, Service	Friday, 05 Jan 2024	Tuesday, 06 Feb 2024 12:00 AM	PTO
Areheart, Sam	Approved	Account, Service	Monday, 08 Jan 2024	Monday, 15 Jan 2024 12:00 AM	PTO
Azzarito, Deborah	Approved	Account, Service	Monday, 08 Jan 2024	Monday, 15 Jan 2024 12:00 AM	PTO
Badgett, Gregory	Denied	Account, Service	Monday, 08 Jan 2024	Monday, 15 Jan 2024 12:00 AM	PTO
Blakely, Latrice	Denied	Account, Service	Monday, 08 Jan 2024	Thursday, 11 Jan 2024 12:00 AM	PTO
Blakely, Latrice	Denied	Account, Service	Monday, 08 Jan 2024	Thursday, 11 Jan 2024 12:00 AM	PTO
Cathy, Kelly	Approved	Account, Service	Monday, 08 Jan 2024	Thursday, 11 Jan 2024 12:00 AM	PTO
Goldfarb, Brett	Denied	Account, Service	Monday, 08 Jan 2024	Friday, 12 Jan 2024 12:00 AM	PTO
Barton, Jean	Denied	Account, Service	Monday, 08 Jan 2024	Thursday, 11 Jan 2024 12:00 AM	PTO
Badgett, Gregory	Pending	Badgett, Gregory	Tuesday, 16 Jan 2024	Monday, 29 Jan 2024 12:00 AM	PTO
Badgett, Gregory	Pending	Badgett, Gregory	Tuesday, 16 Jan 2024	Tuesday, 30 Jan 2024 12:00 AM	PTO
Barton, Jean	Pending	Barton, Jean	Tuesday, 16 Jan 2024	Friday, 26 Jan 2024 12:00 AM	PTO
Barton, Jean	Pending	Barton, Jean	Wednesday, 17 Jan 2024	Friday, 16 Feb 2024 12:00 AM	PTO
Badgett, Gregory	Approved	Account, Service	Monday, 22 Jan 2024	Wednesday, 10 Jan 2024 12:00 AM	PTO
Areheart, Sam	Pending	Areheart, Sam	Thursday, 25 Jan 2024	Monday, 11 Mar 2024 12:00 AM	PTO
Areheart, Sam	Pending	Areheart, Sam	Thursday, 25 Jan 2024	Tuesday, 12 Mar 2024 12:00 AM	PTO
Areheart, Sam	Pending	Areheart, Sam	Thursday, 25 Jan 2024	Wednesday, 13 Mar 2024 12:00 AM	PTO
Areheart, Sam	Pending	Areheart, Sam	Thursday, 25 Jan 2024	Thursday, 14 Mar 2024 12:00 AM	PTO
Areheart, Sam	Pending	Areheart, Sam	Thursday, 25 Jan 2024	Friday, 15 Mar 2024 12:00 AM	PTO



Change audit log

View changes made to the system, including the person who made the change.

Application

Includes changes to agent profiles, collection points, the Enterprise Model, and others.

Current audit report sources		
The list below shows the sources of audit entries for your report.		
Name	Description	
Agent Image	Reports changes to agent images	Report
Agent Profiles	Reports changes to agent profiles or subordinate settings.	Report
Collection Points	Reports changes to a collection point or any of the historical data collected for the collection point.	Report
Community Group Member	Reports changes to members of all community groups (User groups). Includes adding and removing members from the group.	Report
Data Sources	Reports changes to a data source properties.	Report
Enterprise Model	Reports a change to the enterprise model	Report
Recurring Events	Reports changes to recurring events on the published schedule.	Report
Schedule Event	Reports changes to any published or working schedule event by any user. Includes edits thru dialog windows and drag and drop operations.	Report
Self Service Validation Plan	Reports a change to self service validation plans	Report
Time Off Request	Reports changes to time off requests	Report
Time zone configuration	Reports changes to the configured set of time zone definitions.	Report

Auto-Approve

Includes changes to the auto-approve rules for a specified date range. These apply to legacy and advanced vacation.

Current audit report sources		
The list below shows the sources of audit entries for your report.		
Name	Description	
Auto Approve Rules	Reports a change in auto approve rules	Report



PTO Application

Includes changes to advanced vacation features such as PTO policies, calendar partitions, and accrual schedules.

Current audit report sources		
The list below shows the sources of audit entries for your report.		
Name	Description	
Calendar partition bid round responses	Reports changes to time off requests as part of a calendar partition bid round.	Report
PTO Accrual Schedule	Reports change to PTO accrual schedules	Report
PTO Bid Round Exception Reason Codes	Reports a change to PTO bid round exception reason codes	Report
PTO Bid Round Standby Reason Codes	Reports a change in PTO bid round standby reason codes	Report
PTO Calendar Partition	Reports a change in a PTO Calendar Partition	Report
PTO Classification	Reports changes to PTO classifications	Report
PTO Classification Event Type	Reports changes to PTO classification event types	Report
PTO Classification Image	Reports changes to PTO classification image	Report
PTO Policy	Reports change to a PTO policy	Report
PTO Time Off Rules	Reports a change in PTO time off rule settings	Report
PTO Working Accrual Calendar	Reports a change in a PTO working accrual calendar	Report
Published Accrual Calendar	Reports changes to PTO accrual calendars	Report



Security

Includes changes made to security settings on any asset, and data subject rights requests and responses.

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

Name	Description	
Data Subject Rights	Reports a data subject rights request or response	<input type="button" value="Report"/>
Data Subject Rights Response	Reports a response to a data subject rights request, including change of status and comments.	<input type="button" value="Report"/>
Secure Assets	Reports changes to any secure asset with any security context, including resetting all security to factory defaults.	<input type="button" value="Report"/>

Data targets

Create, configure, and run data target reports (an optional feature).

Report > Administrative & utility > Data targets > Data target worksheet

Data target worksheet

Basic properties

Data Target Type:

Friendly Name:

Collection Interval:

Update Time: : :

Data Target Active:

Select Output Option:

Report Type:

Data Target Delimiter:

User logon report

Includes people who are logged in to Community. Show only currently logged on users or all users, and sort by name, logon start time, or logon duration.



Reports in other places

Community includes many useful reports in other work areas.

Published Forecast Reports

Access these reports by navigating to Forecast > Published forecast then select *Generate forecast reports* in the Report tile.



Contact volume

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

- ⊙ 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)



Forecast Contact Volume

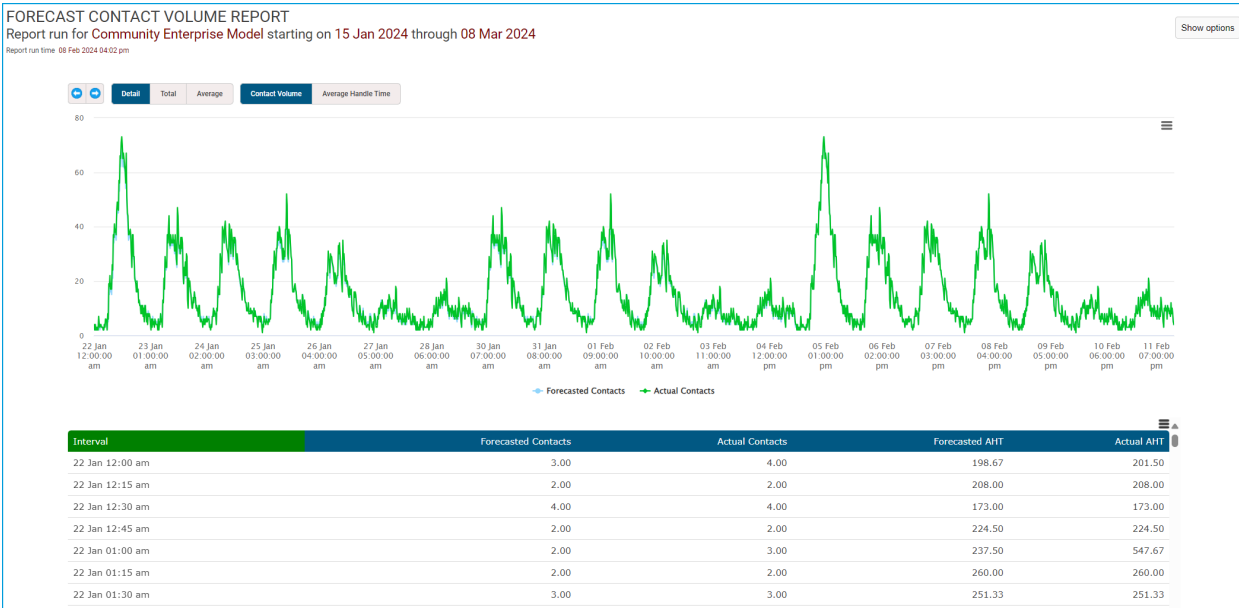
Create your forecast with historical contact volume data and analyze your forecast accuracy. Use the Show options panel to change the chart type, then use the tabs to change the display.

Total Forecast Contacts by—

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

Average Forecast Contacts by—

- ⌵ Interval
- ⌵ Day of Week
- ⌵ Month



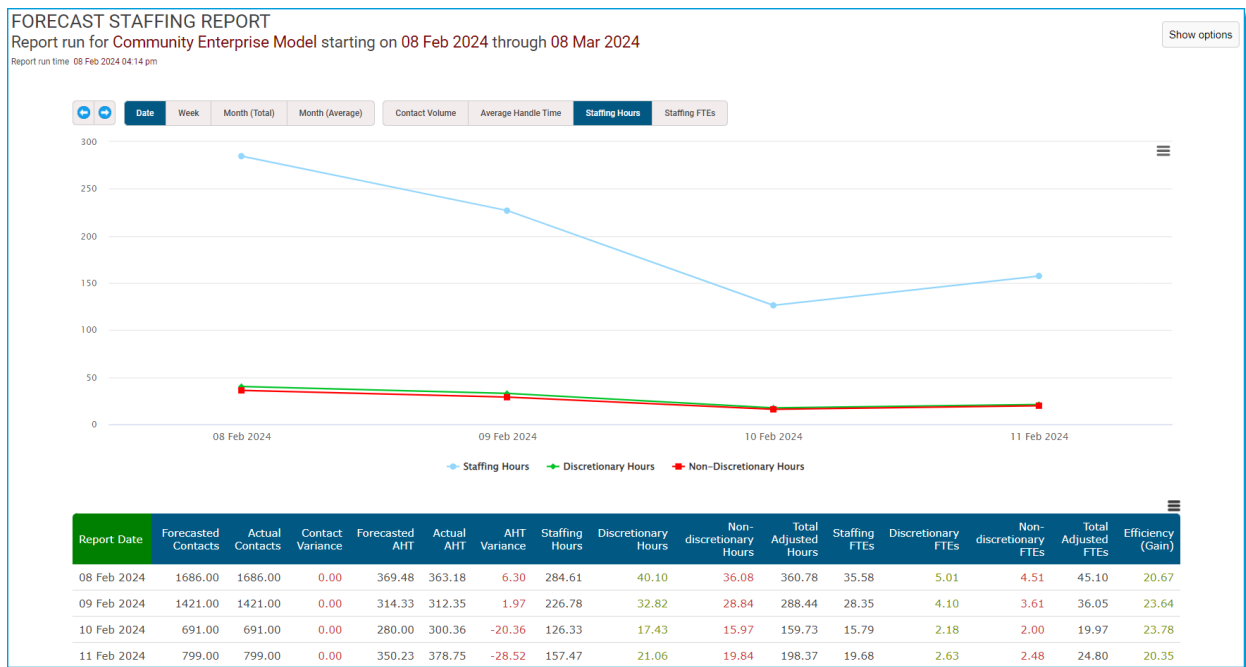


Forecast Staffing Requirements

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

Enter a date range to see historical data by:

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










Working schedule reports

Open a working schedule then use the navigation pane to select the report.

Interactive Schedule Reports

Includes agent by activity, weekly schedule by activity (useful if there are overnight shifts), schedules by supervisor or custom user group, and unassigned participant.

Interactive Schedule Reports

-  Agent schedules by Activity
-  Weekly schedules by Activity
-  Agent schedules by Supervisor
-  Agent schedules by User Group
-  Unassigned participant report

Unassigned participant report

View agents who do not have a schedule template assignment for the scheduled week. Use this report if, when running a schedule, you receive a warning message that there are agents without assignments.

Verify settings before scheduling

Status	Conflict Name	Status Message
✓	Work Habits & Hours Verification	Work habits and hours exist for all activities included in this schedule.
✓	Agent Assignment	All agents are assigned to activities
⚠	Agent Schedule Template Assignment	The schedule template assignment for one or more of your schedule participants could not be verified.
✓	Current Schedule Running Verification	No schedule job or agent requirements forecast job is currently running.



Utility Schedule Reports





Participant availability and preferences

View approved schedule availability requests.









Effective schedule assignments

View a list of all agents, their schedule template type, or if they do not have an assigned template for the schedule week.

Utility Schedule Reports ▾

-  Participant availability & preferences
-  31 Effective schedule assignments
-  30 Assignment profile assignments
-  Schedule generation results

Effective schedule assignment report for **Week of 2/5/2024**
05 February 2024 - 11 February 2024

Agent Name	Type	Schedule Template	Droppable?	Assignment Notes
 Areheart, Sam	Fixed	Areheart, S	<input type="checkbox"/>	No assignment parameters required.
 Azzarito, Deborah	Fixed	Azzarito, D	<input type="checkbox"/>	No assignment parameters required.
 Badgett, Gregory	Fixed	Badgett, G	<input type="checkbox"/>	No assignment parameters required.
 Barton, Jean	Fixed	Barton, J	<input type="checkbox"/>	No assignment parameters required.
 Bickley, Sharon	Fixed	Bickley, S	<input type="checkbox"/>	No assignment parameters required.
 Blakely, Latrice	Fixed	Blakely, L	<input type="checkbox"/>	No assignment parameters required.
 Bodine, Cathi			<input type="checkbox"/>	No schedule template assignment is in effect for this agent and schedule
 Brown, Chanell	Fixed	Brown, C	<input type="checkbox"/>	No assignment parameters required.

Assignment profile assignments

View a list of all agents and their schedule template assignment for the schedule week and who does not have a schedule template assigned.

Schedule generation results


View who generated the schedule, then expand to view the results of the schedule generation process for each agent.


Schedule generation results report for **Week of 2/12/2024**
Monday, 12 Feb 2024 through Sunday, 18 Feb 2024


 **671**
 Cotharin, Todd
2024-02-12 06:08:17


Success


← Schedule generation results for task **671**
Week of 2/12/2024 - Monday, 12 Feb 2024 through Thursday, 15 Feb 2024



 Areheart, Sam
Notes 3


 Azzarito, Deborah
Notes 6


 Badgett, Gregory
Notes 9


 Brown, Chanell
Notes 6


 Burns, Barbara
Notes 5





 Carabo, Randy
Notes 5










Published Schedule Reports

Access these reports by opening any published schedule then expanding the sections in the navigation pane. You can select a different date range when running the report.





Interactive Schedule Reports

-  Agent schedules by Activity
-  Agent schedules by Supervisor
-  Agent schedules by User Group


Schedule Analysis & Summary Reports

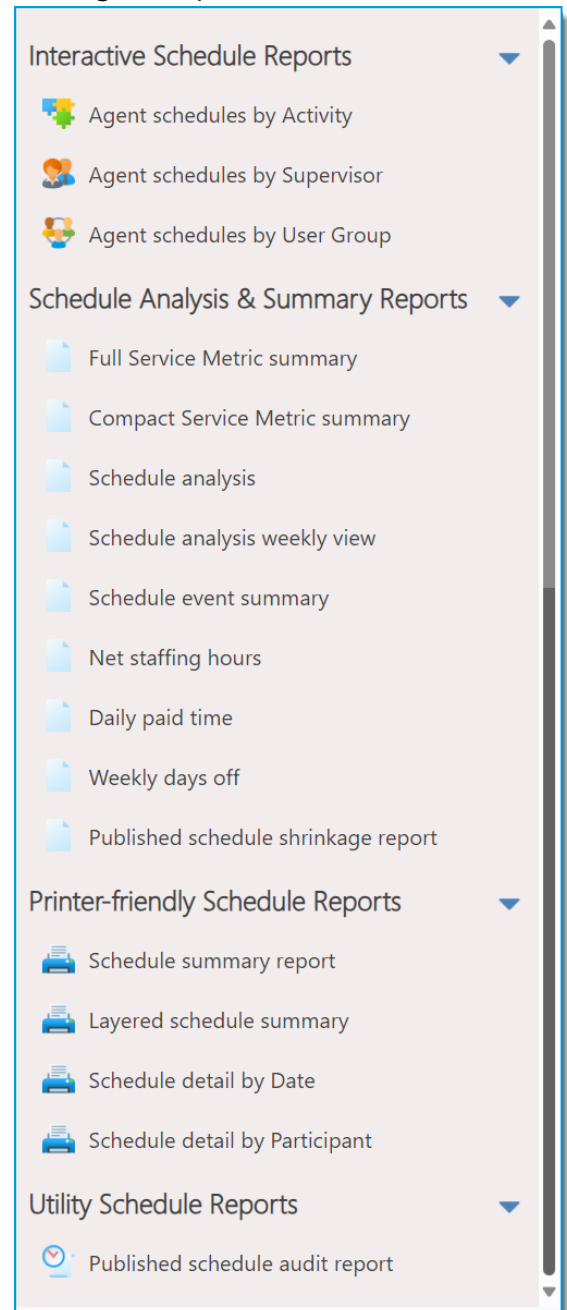
-  Full Service Metric summary
-  Compact Service Metric summary
-  Schedule analysis
-  Schedule analysis weekly view
-  Schedule event summary
-  Net staffing hours
-  Daily paid time
-  Weekly days off
-  Published schedule shrinkage report

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



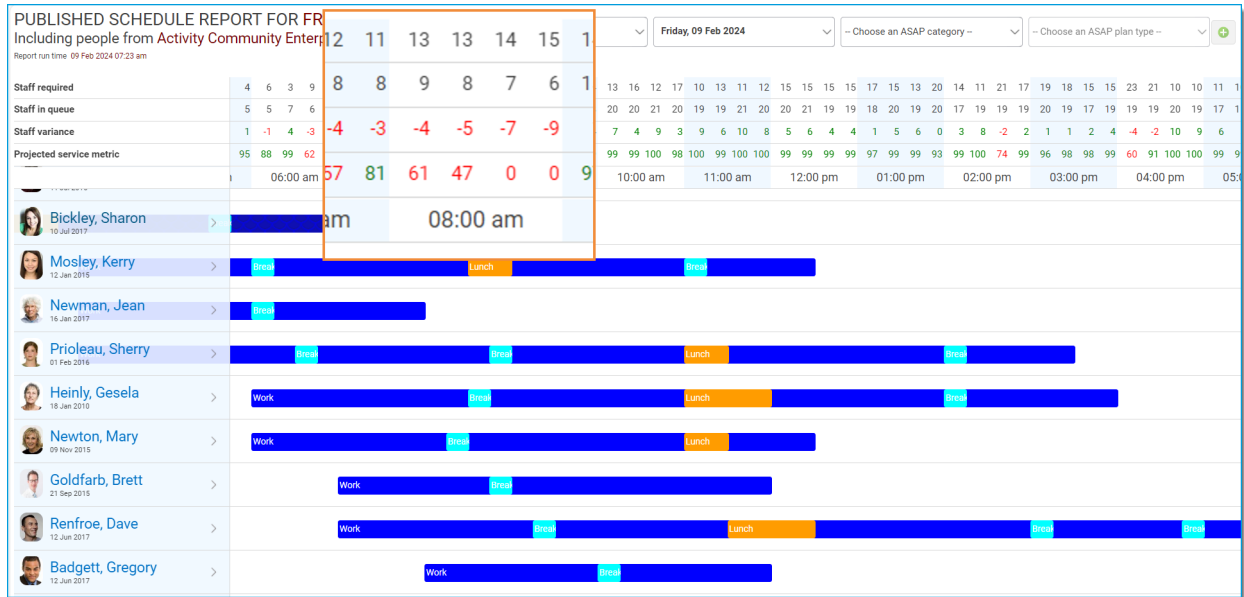
The published schedule audit report includes the option to unpublish existing schedules.



Daily published schedule report

In a published schedule: Interactive Schedule Reports > Agent schedules by activity. Select the report options then the report will open in a new window.

See all of your agent's schedules for the selected day. Change the day in the drop-down menu. From here you can edit schedules, create automated schedule adjustment plans (ASAPs), and view staffing requirements by interval with projected service metric.





Time Off Report

Plan > All things time off > 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. These options are preselected in the report options menu.

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

This report includes estimated cost, based on the hourly wage included in the Enterprise Model.

General report criteria

Filter participants by this Activity
Community Enterprise Model

Report from date
2/9/2024

Report through date
3/9/2024

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

Reported summary data

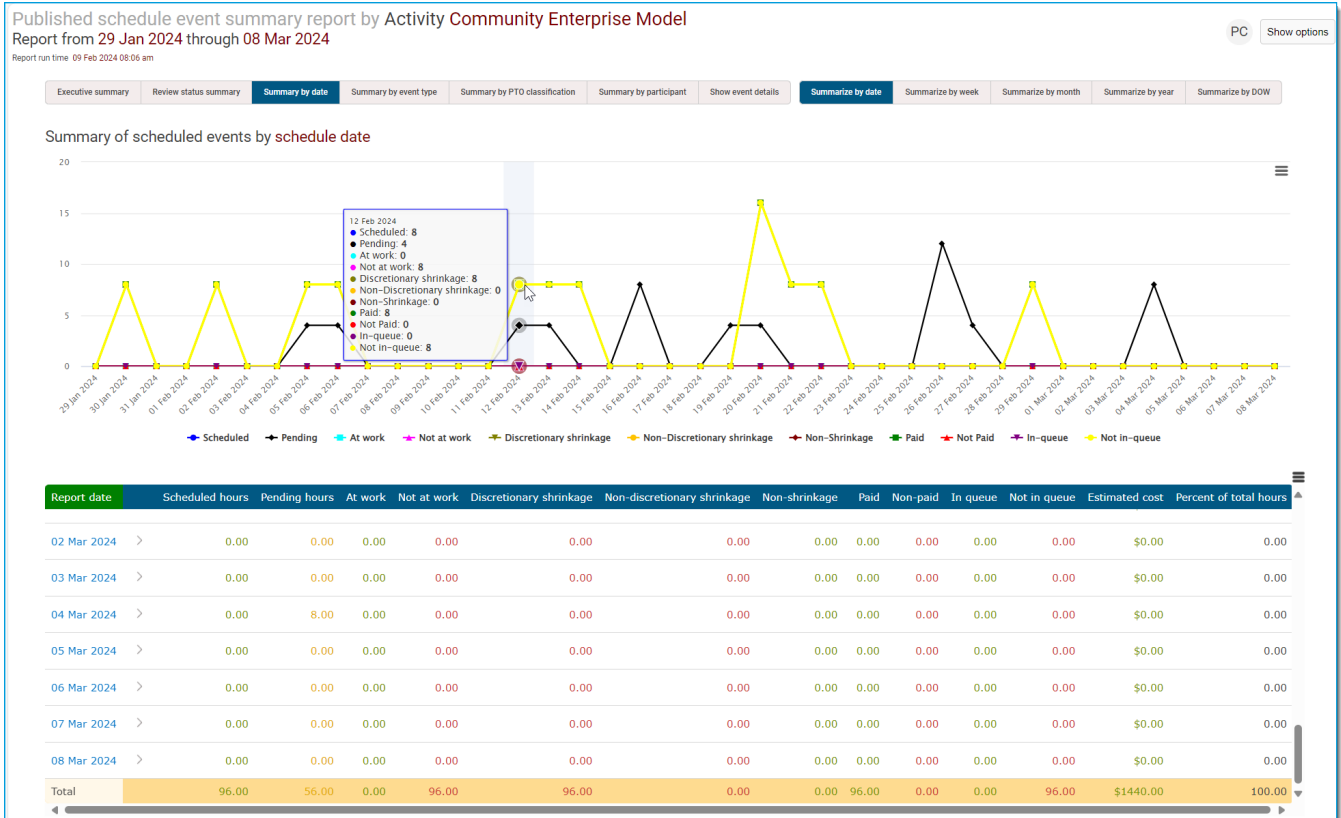
Report type selection
Show event data summarized by a date value

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**.





All auto-approve business rules

Plan > Auto-approve service > Current rules report.

View all auto-approve time off rules for blackout dates, brownout dates, and minimum request intervals. There are tabs to view rules by activity or supervisor.

All Auto-Approve business rules				
Rules applied to activities		Rules applied to supervisors		
Show all auto-approve rules applied to the enterprise model				
Rule name	Activity name	Start date	End date	Modified by
Agent Blackout Date Rule	Site 1 - Dallas, TX	Sunday, July 02 2023	Sunday, July 02 2023	Account, Service
Agent Blackout Date Rule	Site 1 - Dallas, TX	Monday, July 03 2023	Monday, July 03 2023	Account, Service
Agent Blackout Date Rule	Site 1 - Dallas, TX	Tuesday, July 04 2023	Tuesday, July 04 2023	Account, Service
Agent Brownout Date Rule	Site 1 - Dallas, TX	Monday, January 08 2024	Thursday, February 29 2024	Account, Service

Device setup report

Settings > People & agent templates > Device setup report

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

Agent device configuration report		
Thursday, 08 Feb 2024 03:40:19 PM Cotharin, Todd		
Areheart, Sam		
Notification device list		
Phone number	Device name	Is enabled?
9195551212	Personal cell	True
Email address	Device name	Is Enabled?
home@gmail.com	Home email	True
This person doesn't have any push devices set up.		
Azzarito, Deborah		
Notification device list		
Phone number	Device name	Is enabled?
9195551212	Cell phone	True
Email address	Device name	Is Enabled?
myhome@home.com	home email	True
This person doesn't have any push devices set up.		



Cross-training and cluster report

Settings > People & agent templates > Cross-training analysis

Select a site, then review activity assignments (number of people assigned to each activity), people assignments (number of activities assigned to each agent), and cluster analysis. Click on the tiles to see details.


Cross-training and cluster report


Applies to site
Site 1 - Dallas, TX


Activity assignments | [People assignments](#) | [Cluster analysis](#)


Show the number of people assigned to your subordinate activities


Activities


 **Billing**
People assigned: 38


 **New Customer Sales**
People assigned: 38

 **Customer Onboard Service**
People assigned: 38

 **Tier 1 support**
People assigned: 38

 **Sales Email**
People assigned: 23








 **Sales Chat**
People assigned: 23

 **Outbound**
People assigned: 1

Customize forecast cluster information

In a working forecast in the Working Forecast Staffing Requirements section, select Customize forecast cluster information to access the Agent / Activity cross-training and reports.

Working Forecast Staffing Requirements ▾

-  Generate clusters
-  Generate forecast
-  Generate from profiles
-  View forecast reports
-  Revise forecast data
-  Publish forecast data
-  **Customize forecast cluster information**

Agent / Activity cross training and reports

The following reports provide information useful in determining the degree of cross-training among the people in your center.

Customize the forecast participant list

Create a list of forecast participants to tailor the cross-training to the requirements of your particular simulation. If you do not use a participant list, the application will use the agent population instead.

Review the agent cross-training clusters

Review the clusters generated by the clustering algorithm. This will assist in identifying your overall cross-training factor and provide insight into your center's cross training capabilities.

Review the agent cross-training matrix

Review all the agents in your center, and their individual activity assignments. This provides the basis for the forecasting clusters as well as the overall activity assignments of your agents.



The agent cross-training matrix returns a list of all agents and their activity assignments.

Agent / Activity cross training report
 The following matrix displays the agent cross training configuration currently in place.

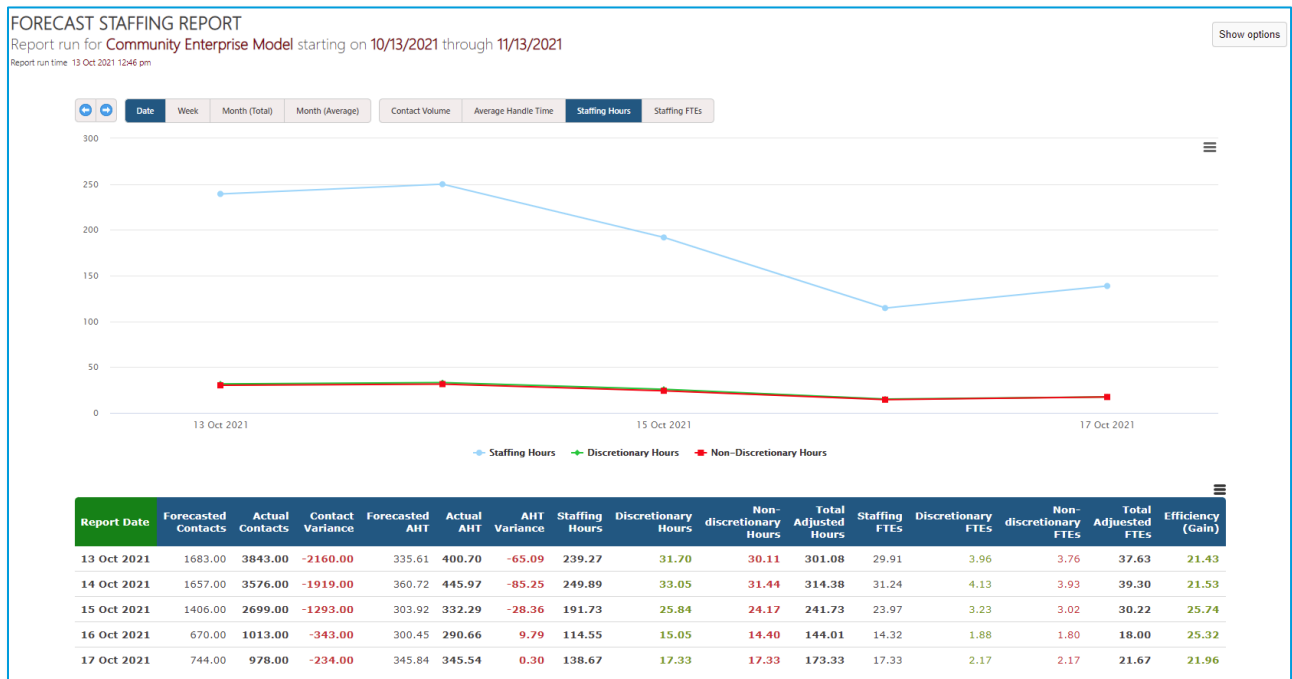
Agent Name	Billing	New Customer Sales	Customer Onboard Service	Tier 1 support	Tier 3	Tier 2	Developer support	Support Email	Sales Email	Sales Chat	Support Chat	BPO A	BPO B	Virtual Activity	BPO C	Outbound
Areheart, Sam									*	*						
Azzarito, Deborah									*	*						
Badgett, Gregory	*	*	*	*												
Barton, Jean									*	*						
Bickley, Sharon									*	*						
Bixler, Lyon					*	*	*	*			*					
Blakely, Latrice									*	*						
Bodine, Cathi	*	*	*	*												*
Brown, Chanell	*	*	*	*												
Brunson, David					*	*	*	*			*					
Burns, Barbara	*	*	*	*												
Carabo, Randy	*	*	*	*												
Carlisle, Kevin					*	*	*	*			*					
Cassleman, Sherry	*	*	*	*												
Cathy, Kelly	*	*	*	*												
Correa, Maria					*	*	*	*			*					
Crislip, Traci	*	*	*	*												
Dolinger, Joel					*	*	*	*								
Dunbar, Bill									*	*						



Where to find frequently requested reports

Where can I view a staffing requirements forecast?

There are three places where you can view a forecast for staffing requirements: in a working forecast, the published forecast, and the intraday performance monitor.



Where can I unpublish a schedule?

Schedule > Published schedule > expand Utility Schedule Reports in the navigation pane > select Published schedule audit report.

Where can I find a report of how my day is going?

Report > Intraday analysis > Intraday report monitor! Scroll down to see the day by 15-minute intervals, with projections for the rest of the day.



I need to review and approve/deny time off requests. Where is the best place?

Plan > All things time off > Time off reports then select *Show event details* tab. This report includes only time off events (occur off-site, not in queue, require supervisor approval) and is sorted in ascending event date order. The *Created on* column lets you know who made the request first for a given day.

Published schedule event summary report by Activity Community Enterprise Model
 Report from 12 Feb 2024 through 12 Mar 2024
 Report run time 12 Feb 2024 02:41 pm

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

Summarize by date Summarize by week Summarize by month Summarize by year Summarize by DOW

Published schedule event summary report by Activity Community Enterprise Model
 Report from 15 Feb 2024 through 15 Mar 2024
 Report run time 15 Feb 2024 10:34 am

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

PC Show options

Event details

Participant	Event type	Event from	Event through	Start time	End time	Total hours	Event hours	Review status	Description (comments)	Created on	
Burns, Barbara	PTO	20 Feb 2024	21 Feb 2024	N/A	N/A	16.00	8.00	Approved	PTO comments	05 Jan 2024 01:13 pm	✖ 🔄 📄 👤
Barton, Jean	LOA	20 Feb 2024	20 Feb 2024	02:00 pm	06:00 pm	4.00	4.00	Pending	Need every Mon and Tues afternoon off.	17 Jan 2024 07:34 am	✖ 🔄 📄 👤
Badgett, Gregory	LOA	22 Feb 2024	22 Feb 2024	12:00 am	08:00 am	8.00	8.00	Approved	Class	04 Jan 2024 01:52 pm	✖ 🔄 📄 👤
Badgett, Gregory	PTO	26 Feb 2024	26 Feb 2024	N/A	N/A	8.00	8.00	Denied	long weekend	05 Feb 2024 08:33 am	✖ 🔄 📄 👤
Barton, Jean	LOA	26 Feb 2024	26 Feb 2024	02:00 pm	06:00 pm	4.00	4.00	Pending	Need every Mon and Tues afternoon off.	17 Jan 2024 07:34 am	✖ 🔄 📄 👤
Badgett, Gregory	LOA	27 Feb 2024	27 Feb 2024	12:00 am	08:00 am	8.00	8.00	Approved	Class	04 Jan 2024 01:52 pm	✖ 🔄 📄 👤
Barton, Jean	LOA	27 Feb 2024	27 Feb 2024	02:00 pm	06:00 pm	4.00	4.00	Pending	Need every Mon and Tues afternoon off.	17 Jan 2024 07:34 am	✖ 🔄 📄 👤

I have people who want a printed copy of the schedule. Where is the best place to do this?

Schedule > Published schedule includes a section for *Printer-friendly Schedule Reports*. Schedule summary and schedule details options are available in Report > Published Schedule.

Agents have access to similar reports in Report > Published schedule.

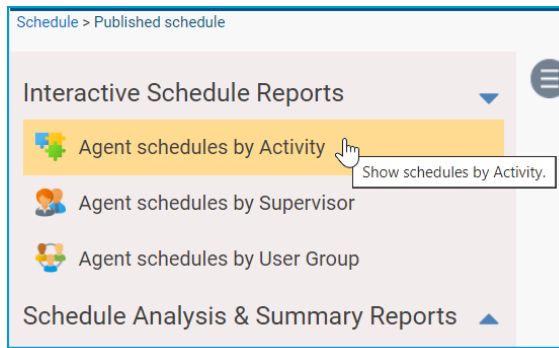


Where can I see my shrinkage?

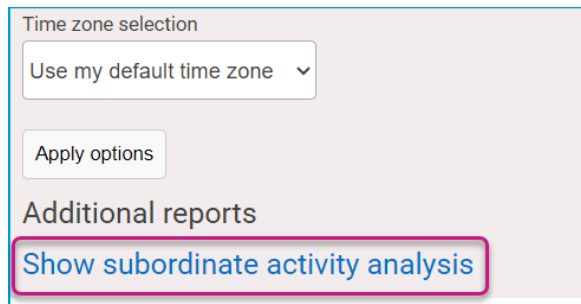
Report > Published schedule > Shrinkage report returns a shrinkage summary report. Select an activity, date range, then use the *Chart display Options* to view the data in different ways. To view your forecasted shrinkage, navigate to Forecast > Published forecast > *Generate forecast reports* > Shrinkage percentages. This will include data only if you make changes to the shrinkage percentages section in a working forecast and then publish the forecast.

Where is the secret subordinate activity analysis report?

Schedule > Published schedule. Under Interactive Schedule Reports select *Agent schedules by Activity*.



In the Report options panel, scroll to the bottom and under additional reports select *Show subordinate activity analysis*.



The report will open in a new window.