



# Services Overview

Webinar handout  
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3400 Waterview Parkway, Suite 325  
Richardson, Texas 75080

phone 877-668-6870  
web [CommunityWFM.com](http://CommunityWFM.com)

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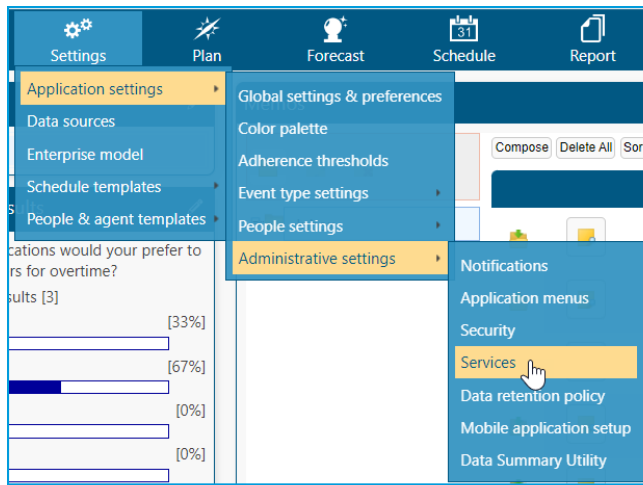
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## Services Overview

Settings > Application settings > Administrative settings > Services

The administrative settings of CommunityWFM includes several services including auto-approve, schedule adherence and schedule attendance monitors, PTO accruals and bidding, data retention, and (optional) data targets.

This area allows you to customize the behaviors of the application services.



**Reminder:** These settings may affect overall system performance; please seek the assistance of your systems administrator before you modify these settings.

**Note:** The Essentials product includes a limited number of these services: Auto-Approve Service, Collection Point Sync Service, Database Maintenance, and Schedule Adherence Summary Service.

### Enterprise product

#### Configure application services

Customize the behavior of your back-end application services.

The following services are supported by this WFM application.

Choose a service and click on the service name link to specify the run-time behaviors.

These settings may affect overall system performance; please seek the assistance of your systems administrator before you modify these settings.

<p><b>Agent Synchronization Monitor Service</b> </p> <p>Performs automatic synchronization of agents from sync sources identified as 'Automatic'.</p> <p>Agent Synchronization Monitor Service</p>	<p><b>Auto-Approve Service</b> </p> <p>Automatically approves or denies time off requests based on user defined rules.</p> <p>Auto-Approve Service</p>	<p><b>Automated Schedule Attendance Monitor</b> </p> <p>Monitors agent state activity to automatically update agent attendance information.</p> <p>Automated Schedule Attendance Monitor</p>	<p><b>Data Retention Service</b> </p> <p>Runs specific maintenance scripts in the database for data retention.</p> <p>Data Retention Service</p>
<p><b>Data Targets Service</b> </p> <p>Provides export functionality for a variety of configured data targets.</p> <p>Data Targets Service</p>	<p><b>Database Maintenance</b> </p> <p>Performs database maintenance tasks to help maintain system health.</p> <p>Database Maintenance</p>	<p><b>PTO Calendar Partition Monitor Service</b> </p> <p>Monitors PTO calendar partitions for regional open selections as well as PTO bid-round expirations.</p> <p>PTO Calendar Partition Monitor Service</p>	<p><b>Published PTO Accrual Calendar Monitor Service</b> </p> <p>Monitors PTO accrual calendars to calculate rollover hours and calculate rollover hours and calculate.</p> <p>Published PTO Accrual Calendar Monitor Service</p>
<p><b>Schedule Adherence Summary Service</b> </p> <p>Creates and maintains schedule adherence summary statistics by participant and time interval.</p> <p>Schedule Adherence Summary Service</p>	<p><b>Schedule Bid Monitor Service</b> </p> <p>Monitors schedule bids for automatically opening and closing a bid at the specified date and time.</p> <p>Schedule Bid Monitor Service</p>		

### Essentials product

#### Configure application services

Customize the behavior of your back-end application services.

The following services are supported by this WFM application.

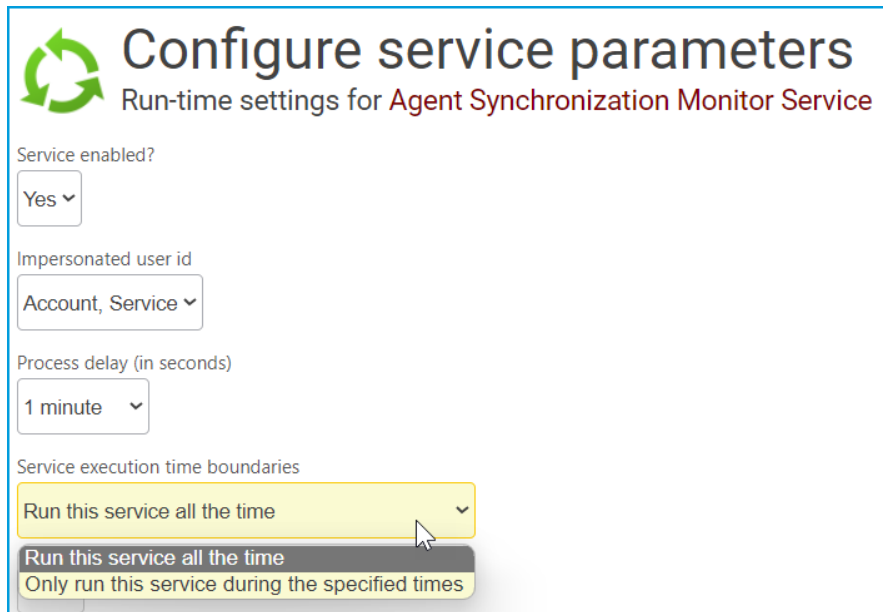
Choose a service and click on the service name link to specify the run-time behaviors.

These settings may affect overall system performance; please seek the assistance of your systems administrator before you modify these settings.

<p><b>Auto-Approve Service</b> </p> <p>Automatically approves or denies time-off requests based on user defined rules.</p> <p>Auto-Approve Service</p>	<p><b>Collection Point Sync Service</b> </p> <p>Synchronizes collection points to leaf-node activities.</p> <p>Collection Point Sync Service</p>
<p><b>Database Maintenance</b> </p> <p>Performs database maintenance tasks to help maintain system health.</p> <p>Database Maintenance</p>	<p><b>Schedule Adherence Summary Service</b> </p> <p>Creates and maintains schedule adherence summary statistics by participant and time interval.</p> <p>Schedule Adherence Summary Service</p>

## Agent synchronization monitor service

Performs automatic synchronization of agents from sync sources identified as 'Automatic Sync.'  
 This service monitors Settings > People & agent templates > Synchronize people > Synchronization templates.



**Configure service parameters**  
 Run-time settings for **Agent Synchronization Monitor Service**

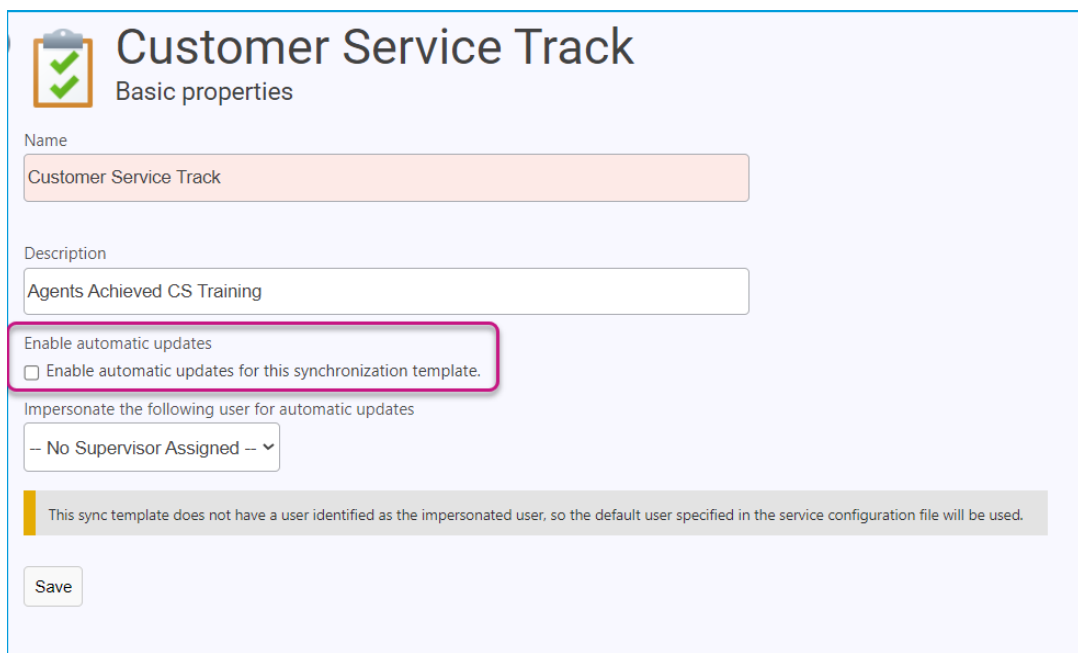
Service enabled?  
 Yes ▾

Impersonated user id  
 Account, Service ▾

Process delay (in seconds)  
 1 minute ▾

Service execution time boundaries  
 Run this service all the time ▾  
 Run this service all the time  
 Only run this service during the specified times

To enable this service, *Services enabled?* must be set to *Yes* in the service parameters, **and** the box to *Enable automatic updates* must be checked in the synchronization template.



**Customer Service Track**  
 Basic properties

Name  
 Customer Service Track

Description  
 Agents Achieved CS Training

Enable automatic updates  
 Enable automatic updates for this synchronization template.

Impersonate the following user for automatic updates  
 -- No Supervisor Assigned -- ▾

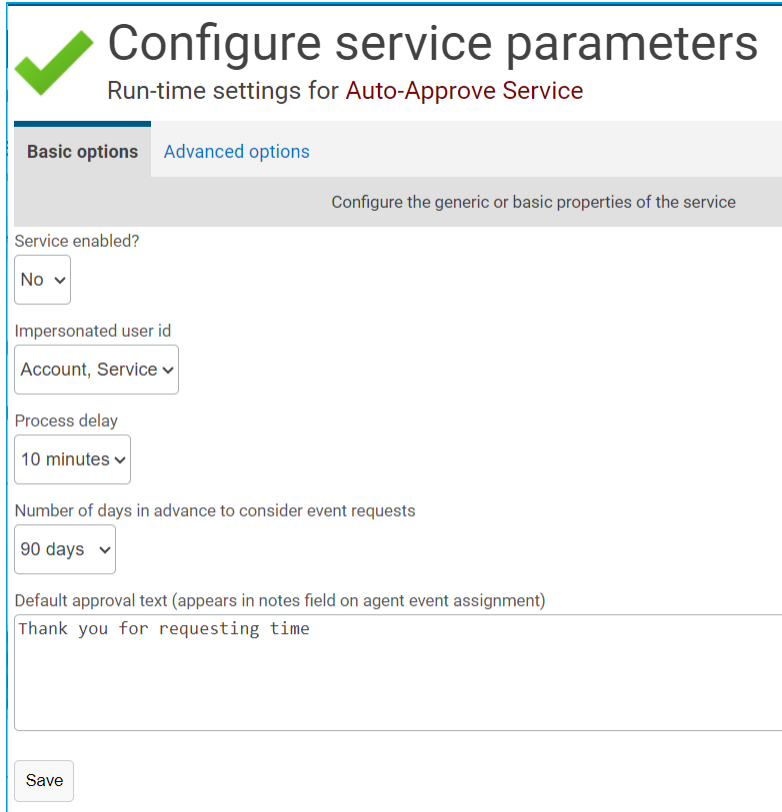
This sync template does not have a user identified as the impersonated user, so the default user specified in the service configuration file will be used.

Save

## Auto-approve service

Some ease into the auto-approve system by having CommunityWFM auto-deny requests to start. As they become more comfortable, they'll start using the full auto-approve system.

You can always override a denied request if you find that you can allow more agents time off, and conversely you can manually change a request from "approved" to "denied."



### Configure service parameters

Run-time settings for **Auto-Approve Service**

Basic options
Advanced options

Configure the generic or basic properties of the service

Service enabled?

No ▾

Impersonated user id

Account, Service ▾

Process delay

10 minutes ▾

Number of days in advance to consider event requests

90 days ▾

Default approval text (appears in notes field on agent event assignment)

Thank you for requesting time

Save

### Basic options

**Service Enabled?** Select Yes to enable the service.

**Impersonated user id:** When you approve or deny a request, it must come from someone. Who do you want as the auto-approver/denier? We recommend having "the system" or the WFM administrator be the denier, then the denial comes from "the system."


**Process delay:** Delay time between service execution asks how often you want this to run. **The recommended setting is 10 minutes.** With all the new features depending on the auto-approve service, it needs an extended time to complete the process, or the service could fail.

**Number of days in advance to consider event requests:** How far ahead do you want CommunityWFM to look for requests? System default is 90 days (CommunityWFM will only consider requests that affect the next 90 days). If planning to allow vacation requests far in advance, consider setting this to 365 days. One year is the maximum.

**Default approval text:** Add or edit the custom approval message.

**\*\*The next section is important.\*\***

## Advanced options



### Configure service parameters

Run-time settings for **Auto-Approve Service**

Basic options
Advanced options

Configure advanced options specific to this service

#### Notification settings

- Include evaluation time stamp in approval or denial notes text
- Automatically issue a memo to the requesting agent upon review

#### Single-day event permissions

Select the days you want to automatically approve agent requests

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

What do these checkboxes mean? Each box above represents a day of the week. If the box is **checked**, then the Auto-Approve service will mark any request on that day of the week as approved if it does not fail any of the rules that apply. If the checkbox is **not checked**, then Auto-Approve will leave the event request in a pending state if it does not fail any rule. However, in either case, if an event fails any rule in effect, Auto-Approve will **deny** the event request.

Do you want to localize the request times?

Yes, let me choose what time zone option to use for Auto-Approve. ▾

What time zone option should Auto-Approve use?

Use the requesting person's time zone. ▾

#### Multi-day event request permissions

- For multi-day time off requests, the auto-approve service has the authority to **Approve** these requests.

## Notification settings

**Include evaluation time stamp in approval or denial notes text:** Do you want to include a time stamp for when CommunityWFM looked at the request? Typically, yes.

**Automatically issue a memo to the requesting agent upon review:** Do you want the agent to get a memo when the request has been reviewed? Typically, yes.

## Single-day event permissions

If checking the boxes for the days of the week, and the request meets the rules criteria (i.e., blackout and brownout days, accrued hours, minimum request interval, hire date restriction, restricted activity plans), then CommunityWFM will approve the request.

**(Recommended if using auto-deny/pend others)** If the boxes are not checked, CommunityWFM will deny requests that do not meet the criteria set up with the rules and leave everything else as pending.

**Do you want to localize the request times?** Corporate and UTC option were removed in 5.1 SP1. The default is "let me choose the time zone option..." and is not editable.

**What time zone option should Auto-Approve use?** Auto-approve service uses agent time zone for approvals and is not editable.

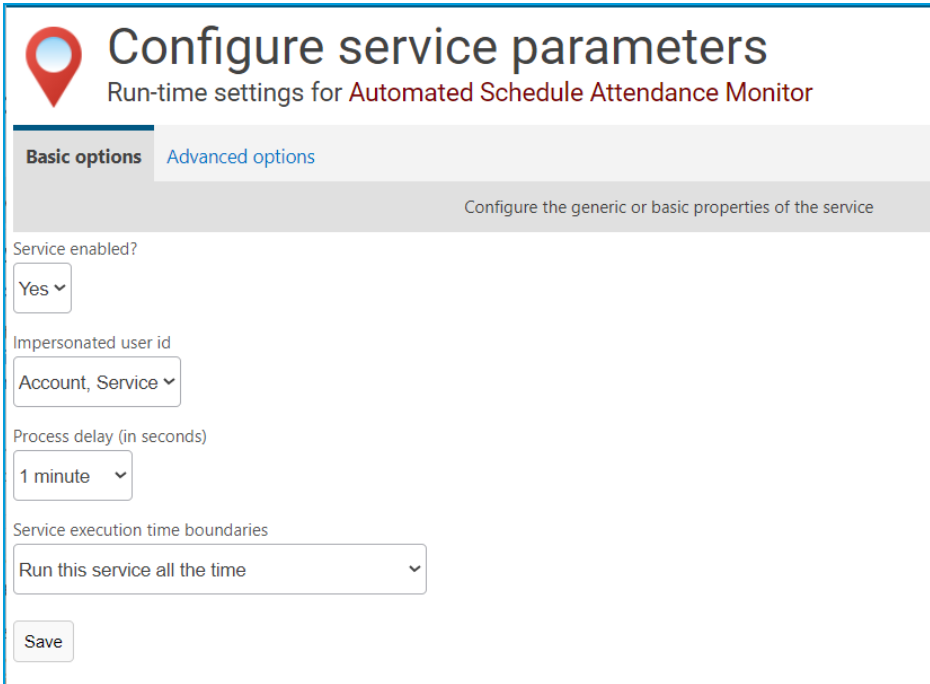
## Multi-day event request permissions

If checked, auto-approve can approve multi-day requests as a block. If the event was requested with *Yes, all the dates in the range must be approved together*, the multi-day event request permissions must be checked to grant the auto-approve service the authority to approve multi-day events. If unchecked, it will leave multi-day requests in a pending state (if *Yes, all the dates in the range must be approved together* selected).

## Automated schedule attendance monitor

The ASAM is a module available for administrators, schedulers, and supervisors to add to their Today page (if permission to do so is included in the application menu options). It keeps track of who is scheduled and their check-in status. It also includes tools to quickly update an agent's attendance status.

### Basic options



**Configure service parameters**  
Run-time settings for **Automated Schedule Attendance Monitor**

**Basic options** | [Advanced options](#)

Configure the generic or basic properties of the service

Service enabled?  
Yes ▾

Impersonated user id  
Account, Service ▾

Process delay (in seconds)  
1 minute ▾

Service execution time boundaries  
Run this service all the time ▾

Save


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

**Impersonated user id:** This ID is the sender of the memos. We recommend using the Service Account as the sender when, for example, someone is automatically marked as late by the system.

**Process delay:** This is how often the system will check for updated attendance. Select from 1–10 minutes, 15 or 30 minutes, or 1 hour. Shorter times will increase system resource use.

**Service execution time boundaries:** Allows specifying start and end times to run the service (e.g., to run only when the center is open).

## Advanced options



# Configure service parameters

Run-time settings for **Automated Schedule Attendance Monitor**

Basic options

**Advanced options**

Configure advanced options specific to this service

Participant list type

Select an activity from the enterprise model
▼

Selected activity

Community Enterprise Model

Transaction buffer size for soft checkins

15
▼

Auto tardy time

Automatically create tardy events after 5 minutes
▼

Save

**Participant list type:** Narrow the group monitored by the service. Select from an Activity in the Enterprise Model, a supervisor group, or custom user group. **Note:** This applies to the ASAM for all users. Individual users may customize preferences for the ASAM on their Today page to narrow their view to a selected group.

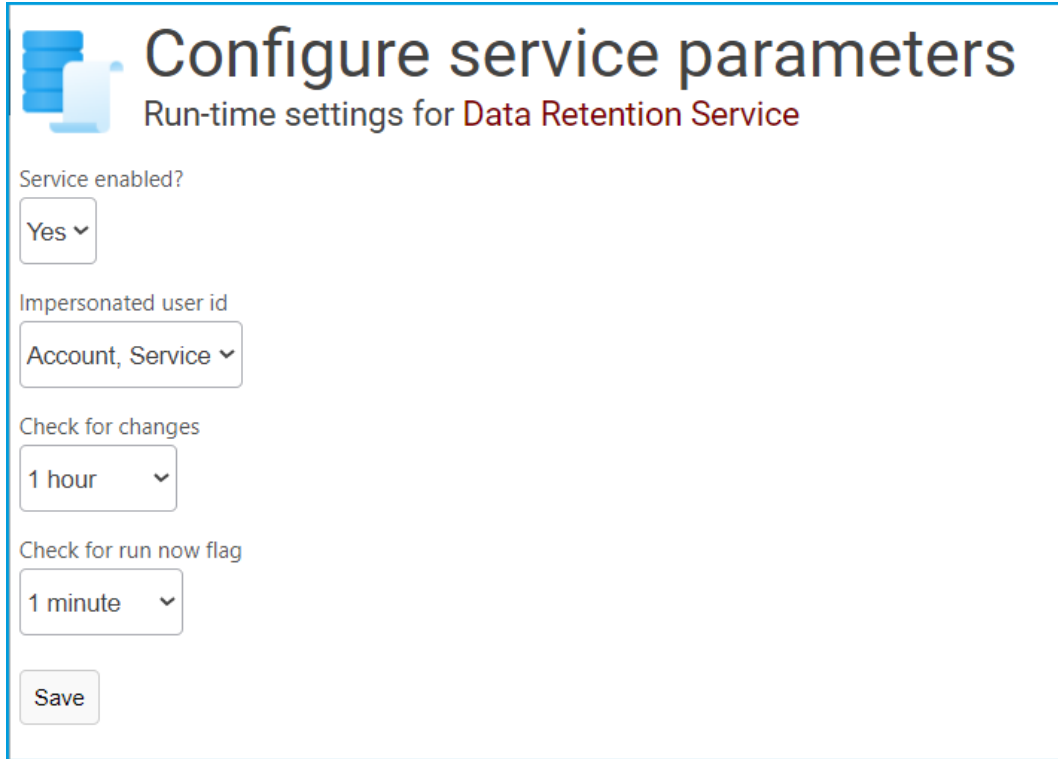
**Transaction buffer size for soft checkins:** Select 1, 5, 10, or 15 (15 is the default). How far back the system looks to find phone state transactions. E.g., If the process delay is 1 minute and buffer size is 15 minutes, every 1 minute the system will look back at the last 15 minutes for check-ins.

**Auto tardy time:** select *Do not create auto tardy events* or from 1–30 minutes. The system will create a tardy event on the agent’s schedule if they have not checked in after the selected amount of time.

**Note:** This is a global setting that will apply to all sites in the Enterprise Model. If you select Site 1 in the advanced options to have a tardy time of 5 minutes, the other sites will not have an automatic tardy time.

## Data retention service

This service applies to Settings > Application settings > Administrative Settings > Data retention policy. In the policy you can configure how long to keep each type of data.



**Configure service parameters**  
Run-time settings for **Data Retention Service**

Service enabled?  
Yes ▾

Impersonated user id  
Account, Service ▾

Check for changes  
1 hour ▾

Check for run now flag  
1 minute ▾

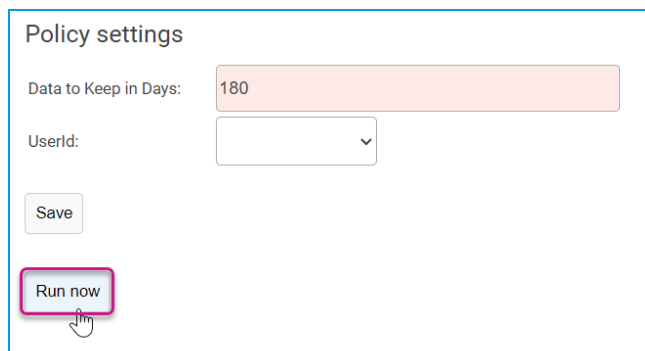
Save

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

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

**Check for changes:** Select from 1–10 minutes, 15 or 30 minutes, or 1 hour.

**Check for run now flag:** In each policy there is a 'run now' button. If you click the button in the policy, it will run after the amount of time specified here. Select from 5, 10, 15, or 30 seconds, or 1 minute.



**Policy settings**

Data to Keep in Days: 180

UserId: ▾


Save

Run now



## Database maintenance

This is for backing up your database. Note that this process uses significant system resources and it's best to perform the backup when the center is closed or a slow time.



### Configure service parameters

Run-time settings for **Database Maintenance**

Service enabled?

No ▾

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

Day of week to run the full backup

Monday ▾

Start time

1 ▾

:

00 ▾

:

AM ▾

Save


**Backup location on the database server or network share:** Where to store the data backup.

**Day of week to run the full backup:** Select the day of the week to run the backup.

**Start time:** Select the start time for the full backup.

## PTO Calendar partition monitor service

This service monitors updates to calendar partitions for expired open selection calendars and expirations of bid rounds.



### Configure service parameters

Run-time settings for **PTO Calendar Partition Monitor Service**

Service enabled?

Impersonated user id

Process delay (in seconds)

Service execution time boundaries

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


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

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

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

## Published PTO accrual calendar monitor service

This service monitors PTO accrual calendars for new accruals, calculates rollover additions and expirations, and calculates forfeited and shortage hours.



### Configure service parameters

12 Run-time settings for **Published PTO Accrual Calendar Monitor Service**

Service enabled?

Yes ▾

Impersonated user id

Account, Service ▾

Process delay (in seconds)

1 minute ▾

Service execution time boundaries

Run this service all the time ▾

Save

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


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

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

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

## Schedule adherence summary service

Creates and maintains schedule adherence summary statistics by participant and time interval.



### Configure service parameters

Run-time settings for **Schedule Adherence Summary Service**

Service enabled?

Yes ▾

Impersonated user id

Account, Service ▾

Process delay (in seconds)

10 minutes ▾

Service execution time boundaries

Run this service all the time ▾

Save

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


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

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

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

## Schedule bid monitor service

Monitors schedule bids for automatically opening and closing a bid at the specified date and time.



### Configure service parameters

Run-time settings for **Schedule Bid Monitor Service**

Service enabled?

Impersonated user id

Process delay (in seconds)

Service execution time boundaries

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

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

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

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