



# All About Employee Profiles

Webinar handout  
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## Table of Contents

About this document.....	5
Adding new agents .....	5
One at a time (manual).....	6
Import agents from a data source .....	6
Step 1: Specify default properties and data source.....	7
Step 2: Import selected agents.....	7
Step 3: Review import results.....	7
Importing agents via Excel.....	8
Properties.....	8
Basic properties.....	9
Custom properties .....	9
User login credentials .....	10
Activities .....	10
Scheduling.....	10
Schedule templates .....	10
Schedule availability .....	11
Schedule preferences.....	13
Start time preferences.....	13
Day off preferences.....	14
Adherence.....	15

Advanced Configuration .....	16
Time off settings .....	16
General time off settings.....	16
PTO policy.....	16
Restricted action plan .....	16
Employment transitions .....	17
Activating and deactivating users.....	17
Step-by-step .....	17
In product versions prior to 5.1SP2.....	18
Security .....	19
Extras for [agent name].....	19
Profile photos.....	19
External devices.....	20
User group membership.....	20
Agent synchronization.....	20
Automatic .....	20
Manual .....	21
Send a message .....	22
Attendance log .....	23
Data subject rights.....	23
Appendix 1: Import agents from Excel.....	24
Import Options.....	24

Step1: Import defaults and select import file .....	25
Step 2: Select a Worksheet .....	26
Step 3: Select or create the import template.....	27
Setting up a new Import Template.....	28
Step 4: Verify and import: Data Validation .....	29
Step 5: Review of import results .....	30
Excel Import Template .....	31
Import agent: field names and descriptions.....	32

## About this document

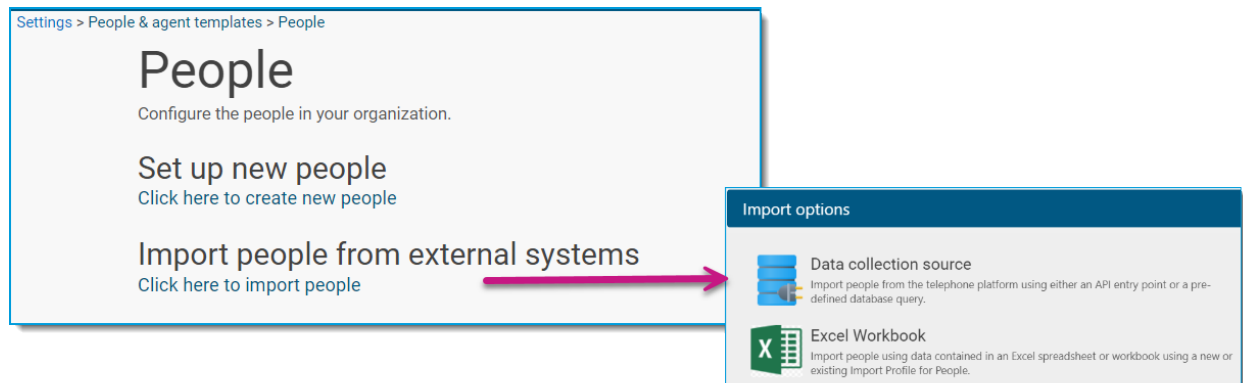
This document accompanies the CommunityWFM College webinar All About Employee Profiles. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

This webinar reviews the Personal profile settings, bulk importing vs manually adding new agents, [activating and deactivating agents](#), [synchronizing agent information](#), and more.

## Adding new agents

Settings > People & agent templates > People

The employee profile includes personal information specific to that person such as hire date, ID, login credentials, and work-related information such as their assigned activities, schedule templates, adherence, and so much more. Administrators may add this information to CommunityWFM for one employee at a time, or bulk importing from the data source (preferred), or uploading via Excel.



When first setting up the organizational structure, best practice is to start at the top of the organization chart and work your way down. Import the management team, then the supervisors for each manager, then the team leads for each supervisor, etc.

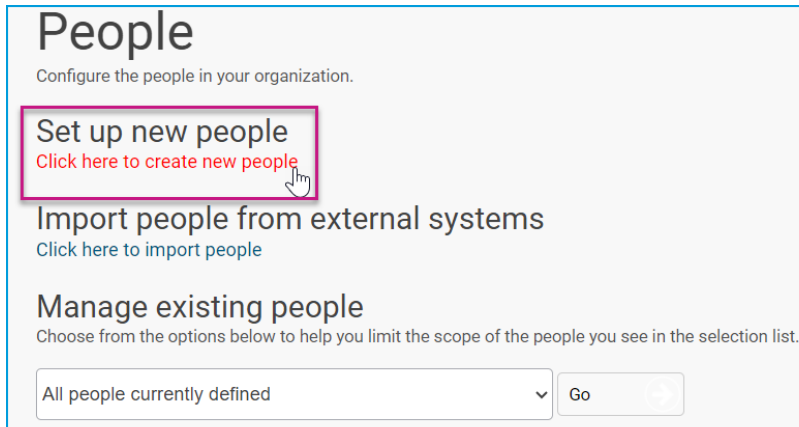
There are three ways to add agents to Community Essentials and Enterprise.

1. Add each agent manually in the People hub (not recommended).
2. Import agents from your data collection source (recommended).
3. Import agents from an Excel spreadsheet.

## One at a time (manual)

Not recommended.

Select *Click here to create new people*.

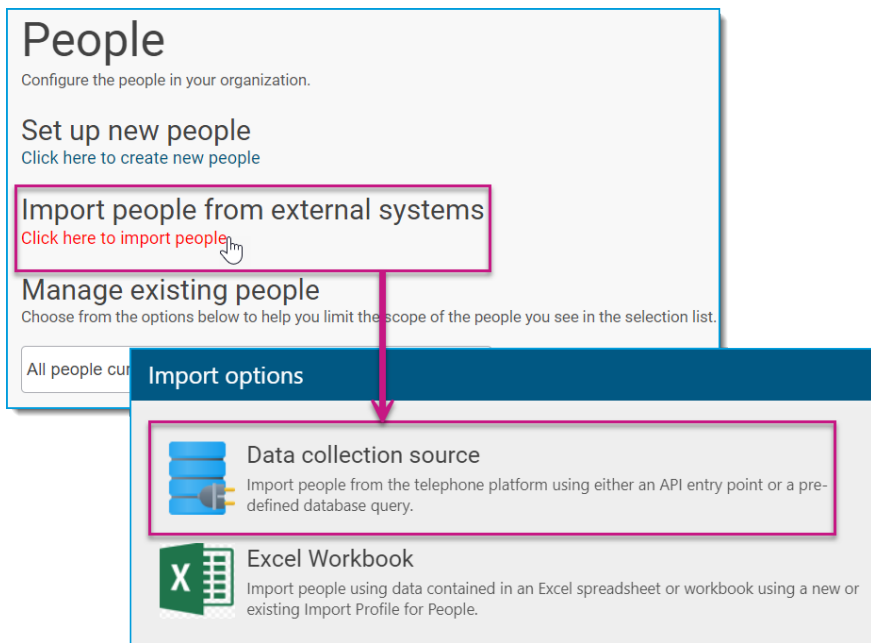


Complete the fields then *Save* or *Save and add another one*. Required fields are first name, last name, hire date, and tiebreak value.

## Import agents from a data source

Select *Click here to import people* under Import People from external systems.

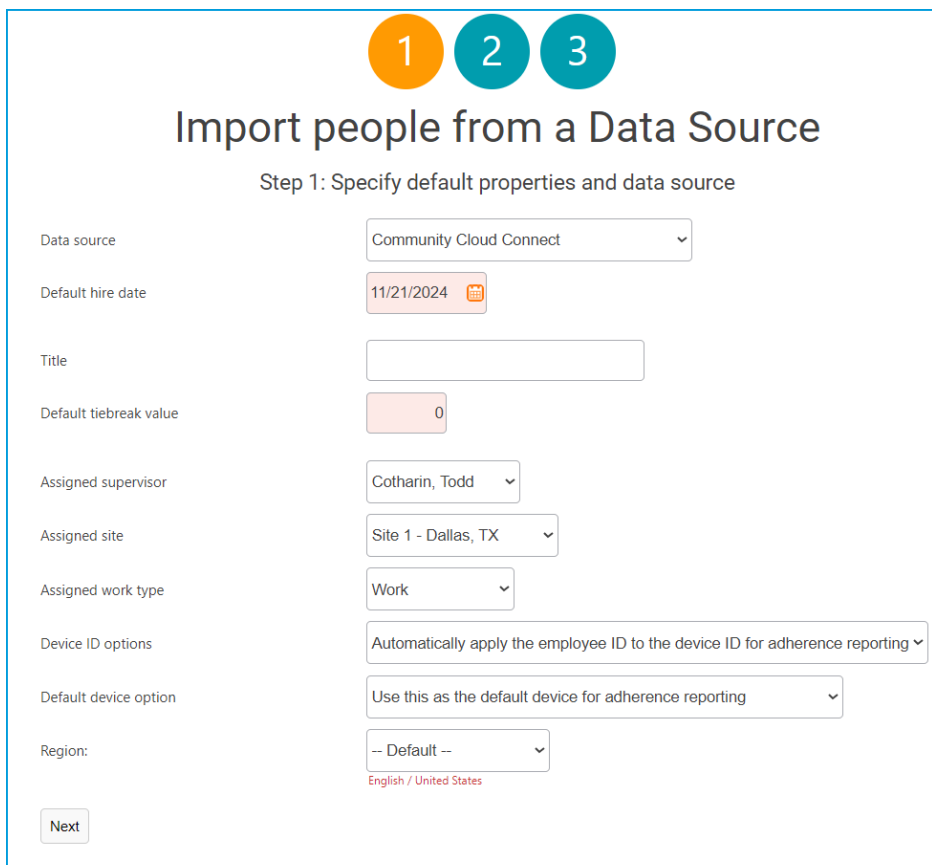
Select *Data Collection source* from the Import Options.



## Step 1: Specify default properties and data source

Select defaults for the following attributes, then click *Next*.

- Data source
- Default hire date (required)
- Title
- Default tiebreak value (required)
- Assigned supervisor
- Assigned site
- Assigned work type
- Device ID options: Default setting will allow pulling in the employee ID
- Default device option
- Region: Allows setting language



1
2
3

### Import people from a Data Source

Step 1: Specify default properties and data source

Data source	<input type="text" value="Community Cloud Connect"/>
Default hire date	<input type="text" value="11/21/2024"/>
Title	<input type="text"/>
Default tiebreak value	<input type="text" value="0"/>
Assigned supervisor	<input type="text" value="Cotharin, Todd"/>
Assigned site	<input type="text" value="Site 1 - Dallas, TX"/>
Assigned work type	<input type="text" value="Work"/>
Device ID options	<input type="text" value="Automatically apply the employee ID to the device ID for adherence reporting"/>
Default device option	<input type="text" value="Use this as the default device for adherence reporting"/>
Region:	<input type="text" value="-- Default --"/> <small>English / United States</small>

## Step 2: Import selected agents

Review the agents who can be imported. You can import agents one at a time or import all.

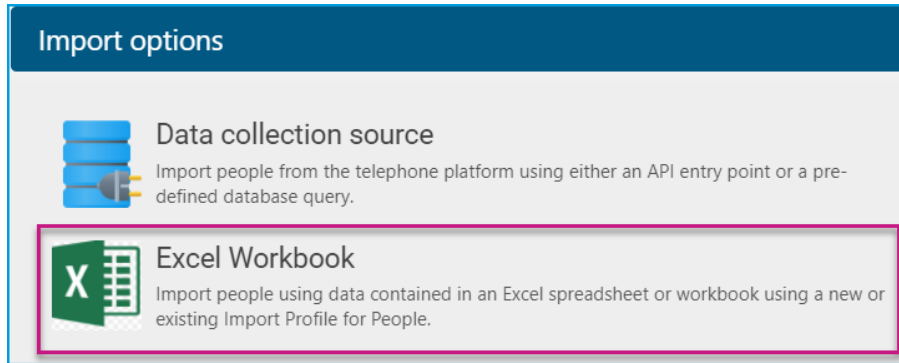
## Step 3: Review import results

Review the people you have imported.

Navigate back to the People page, and you will see the added people.

## Importing agents via Excel

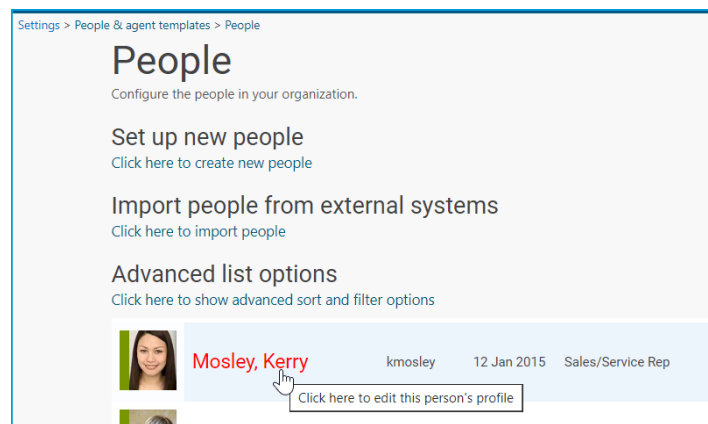
Select *Excel Workbook* from Import Options.



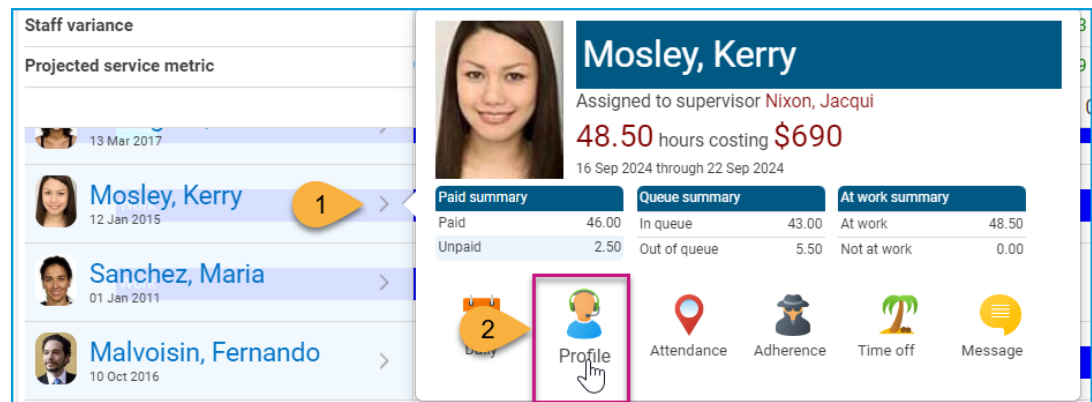
(see [Appendix 1](#) for complete step-by-step instructions).

## Properties

Access an employee profile by going to Settings > People & agent templates > People and selecting the agent's name.



Or from a published schedule report, click the > next to agent's name then select the Profile icon.



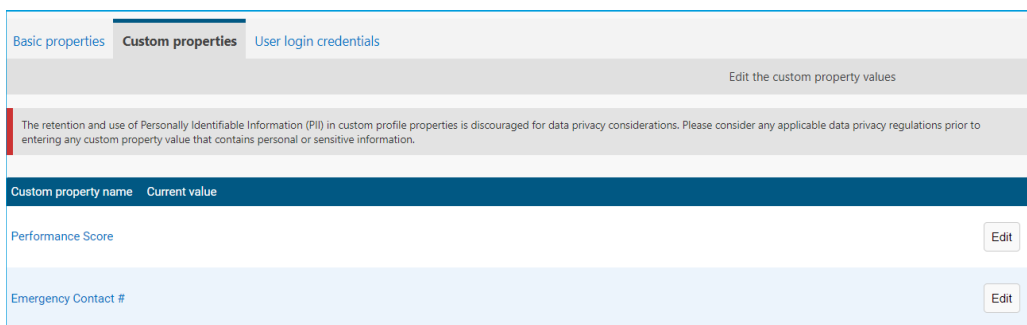
There are 3 tabs in the Properties section: Basic properties, Custom properties, and User login credentials.

## Basic properties

- **First Name, Last name, Hire Date, and Tie Break Value** (used when there are duplicate hire dates and usually kept at 0): all are peach colored indicating mandatory fields.
- **Employee ID:** Required and must be a unique identifier.
- **Title:** optional.
- **Email address:** optional.
- **Assigned supervisor:** Select from the drop-down menu.
- **Assigned site:** Select from the sites.
- **Work type:** Select the primary work type for this person
- **Time zone:** Select the local time zone for the employee if different from the default. Auto-approve service uses this time zone for approvals.
- **Region:** Set the preferred language for the agent.
- **Employee classification:** optional. Create new classifications in Settings > Application settings > People settings > Employee classifications.
- **Application role:** Select from the drop-down menu. This determines permission settings and what menu options are available.
- **User tags** (visible after saving). Used in custom user groups. Use hashtags (#) to add tags. Separate multiple tags with a semi-colon (;).

## Custom properties

This creates options for ranking in schedule and vacation bidding. Consider your local privacy regulations before adding personally identifiable information (PII).

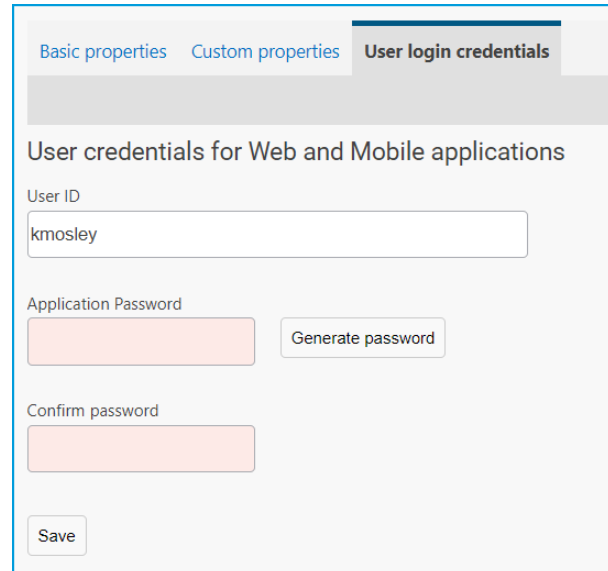


Custom property name	Current value
Performance Score	<input type="button" value="Edit"/>
Emergency Contact #	<input type="button" value="Edit"/>

## User login credentials

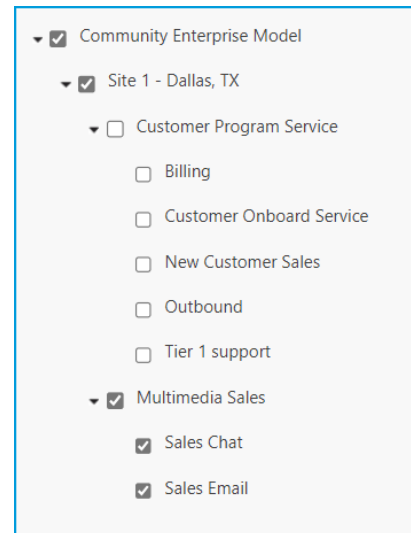
This is where you will create usernames and passwords and can reset an agent’s password if not using single sign on.

The *Generate password* button will populate a password that conforms to the password requirements in the global settings & preferences.



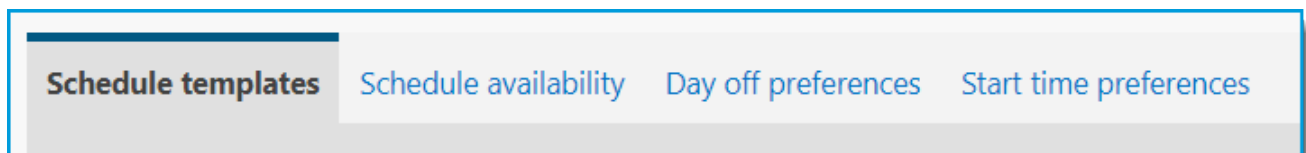
## Activities

Check to add assigned activities for that agent.  
Check the top level for a section to select all subordinate activities.



## Scheduling

This section includes 4 tabs with settings that help determine the schedule that will be assigned to the agent.



## Schedule templates

View current templates and assign previously created schedule templates to this agent.

STEP-BY-STEP – assign new template

1. Select *Click here to create a new schedule template assignment*.
2. **Schedule type:** Select the schedule type from the drop-down (fixed, rotating, floating, common day floating, or composite schedule).
3. **Schedule template:** Select the schedule template from the drop-down.
4. Select the effective date as the first day of the week (as defined in the Enterprise Model) for this schedule so when creating a schedule for this week, this agent will have a schedule assignment.
5. Typically, don't check *Schedule assignment may be dropped*.
6. The review status should remain approved.
7. Click *Save*.

**New schedule template assignment**  
Azzarito, Deborah

Schedule type

Schedule template

Additional assignment parameters

Effective date for this assignment

This schedule assignment may be dropped if volume does not require this agent.

Review status

## Schedule availability


Approve, deny, or return to pending any schedule availability submitted by the agent. You can also enter availability that will automatically be approved by clicking *Click here to set up schedule availability*. If approved, CommunityWFM will not assign a schedule for times when the agent is not available.

### STEP-BY-STEP set up availability

1. Select *Click here to set up schedule availability*.

2. Select the effective date.
3. Enter a description (e.g., *fall school schedule*).
4. In the Availability Patterns section, check the days when the agent is available. **Any unchecked days will be considered “unavailable.”**
5. For each day, select from the drop-down the start and end times of availability. If the same time applies to multiple days, enter the time for the first day then click *Copy*. This will apply the time to any other days that are checked.
6. After making all selections click *Save* and close the window.
7. Refresh the Scheduling setup page to view the list of schedule availability.

**New schedule availability**  
Mosley, Kerry

Effective Date:  
9/16/2024 

Description:  
Fall school schedule

**Availability Patterns**

Available?	Day	Available From	Available Through	
<input checked="" type="checkbox"/>	Monday	Monday, 01:00:00 PM	Monday, 08:00:00 PM	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Tuesday	-- Any Time --	-- Any Time --	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Wednesday	Wednesday, 01:00:00 PM	Wednesday, 08:00:00 PM	<input type="button" value="Copy"/>
<input type="checkbox"/>	Thursday	Thursday, 06:00:00 AM	Thursday, 12:00:00 PM	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Friday	Friday, 01:00:00 PM	Friday, 08:00:00 PM	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Saturday	-- Any Time --	-- Any Time --	<input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Sunday	-- Any Time --	-- Any Time --	<input type="button" value="Copy"/>

Not available, even if times entered.

Availability Review Status  
Approved

To view a list of all agents and their availability for a specific week, go to the working schedule worksheet and in the navigation pane, scroll down and expand Utility Schedule Reports. Select *Participant availability & preferences*.

**Utility Schedule Reports** 1 ▾

- ♥ Participant availability & preferences 2
- 31 Effective schedule assignments
- 31 Assignment profile assignments
- 📄 Schedule generation results

Effective availability report - Week of 9/16/2024			
Status	Agent Name	Availability	Effective Date
✔	Areheart, Sam	Mon(08:00:00 - 14:00:00);Tue(Any Time - Any Time);Wed(08:00:00 - 14:00:00);Thu(Any Time - Any Time);Fri(08:00:00 - 14:00:00);Sat(Any Time - Any Time);Sun(Any Time - Any Time);	16 Sep 2024
✘	Azzarito, Deborah	No Availability In Effect, assume always available	
✘	Badgett, Gregory	No Availability In Effect, assume always available	

## Schedule preferences

Preferences will be considered when the system is creating the schedule but may not always be honored. Preferences may be created by the agents and do not require approval to be in place.

### Start time preferences

Allows establishing preferences for the beginning of a shift. You can create multiple start time preferences if a primary preference is unavailable, using the up and down arrows to rank them in preference order. In this section, each day of the week has a tab, and various preferences associated with that particular day. After making each day's selection, click *Save*. To apply the same preferences to other days, check the days then click *Replicate*.

## Start Time Preferences

Daily start times

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Start Time Preferences for Monday

Reference Number	Ordinal	Preferred Start Time	
49	1	Monday, 07:00:00 AM ▾	▲ ▾ ✘
50	2	Monday, 08:00:00 AM ▾	▲ ▾ ✘
51	3	Monday, 08:30:00 AM ▾	▲ ▾ ✘
		Monday, 12:00:00 AM ▾	🏠

Apply to Other Days

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

👉 Replicate

## Day off preferences

**Preference Priority Settings:** Agents may select whether to prioritize start time or day off (or neither).

**Specify Requested Days Off:** Each day is assigned a point value, and the total for all days must add up to 100. The more points assigned to each day, the more priority that day's preference receives.

**Specify Day Pattern Rules:** This allows prioritizing consecutive days off or honoring the day off preference.

### Schedule Day Preferences

#### Preference Priority Settings

Prioritize the start time preference over the day off preferences.  
 Prioritize the day off preferences over the start time preferences.  
 Do not prioritize either start time or days off, but instead use the most favorable combination for this agent's schedules.

#### Specify Requested Days Off

In this section, we need to identify the what days you would like to have **off** from work. You have been given 100 points to spread across the days of the week. In the box corresponding to each day, enter a number that indicates how important it is to have that day off. Higher numbers indicates that it is more important to have that day off, while lower numbers mean it is less important to have that day off. Please note that the total for all days must equal 100.

Day of Week	Relative Importance
Monday	0
Tuesday	0
Wednesday	0
Thursday	0
Friday	0
Saturday	0
Sunday	0
<b>Total</b>	<b>0</b>

#### Specify Day Pattern Rules


In this section, we need to determine what is more important to you, having the requested days off or consecutive days off. If you would prefer that the scheduler honor the day off preference(s) over consecutive days off, then check the corresponding button. However, if you wish for the scheduler to give weight to consecutive days off over any particular day, then select that button.

Note that the schedule template assignment in effect for the schedule week dictates the opportunity to achieve consecutive days off.

I would prefer to have consecutive days off over having any specific day.  
 I would prefer that the scheduler honor my specific days off over having consecutive days off.

## Adherence

This is the area to set up the data source for adherence reporting. There must be a device ID for the default data source to collect adherence data. Click *Edit* to change the device ID and select the default data source. If an agent does not have a designated default device ID, they will not have adherence data to display.



### Mosley, Kerry

Step 4: Adherence setup

Data source active?	Data source name	Data source type	Device ID	Default?	
✓	Community Cloud Connect	I3	elebron1	✓	<a href="#" style="border: 1px solid #0070C0; padding: 2px 5px;">Edit</a>

To see if anyone is missing a data source login ID or default data source login, run the Data source login report (Report > Administrative & utility > Data source login).

#### Agent Data Source Login Report

Wednesday, 04 Sep 2024 02:13:55 PM Account, Service

**Agents with no data source logins**

Agent id	Agent Name	Employee id	Hire Date	Title	Supervisor
542	Bodine, Cathi	r24181	01 July 2024		

**Agents with no Default Data Source Login**

**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	daden	Mitchell, Lauren
451	Barton, Jean	JBarton	12 June 2017	Sales/Service Rep	I3	Community Cloud Connect	ladhikari	Blair, Travis


## Advanced Configuration

### Time off settings

**Kerry's time off settings**

**General time off settings**

Set up the basic time off configuration for Kerry.




---

Configure basic settings.

**PTO Policy**

Assign Kerry to a PTO policy.  
Current assignment:  
No PTO policy is assigned.




---

Set up the PTO policy.

**Restricted action plan**

Set up restricted action plans for Kerry.



---

Review restricted action plans.

### General time off settings

This includes a tile to designate an agent's time off rule: Legacy auto-approve or calendar partition rules, and whether to impose a hire date delay for time off requests.

**Basic time off settings**

Please select the source of time off rules to apply to Kerry.

Legacy AutoApprove Rules

→

-- Select a time off rule source --

Legacy AutoApprove Rules

PTO Calendar Partition Rules


Enforce a hire-date delay before Kerry is allowed to make any time off requests?

No hire date delay is in effect

→

Yes, a hire date delay is in effect until the date specified below

Hire date delay expiration date

 9/23/2024

Save Cancel

### PTO policy

When using time off accruals, assign a policy to allow generating accruals.

### Restricted action plan

This tile allows creating a plan to restrict access to systems, time off requests, self-service requests, and ASAPs. Plans can have start and end dates, and you can upload supporting documents (not visible to agents).

## Employment transitions

### Activating and deactivating users

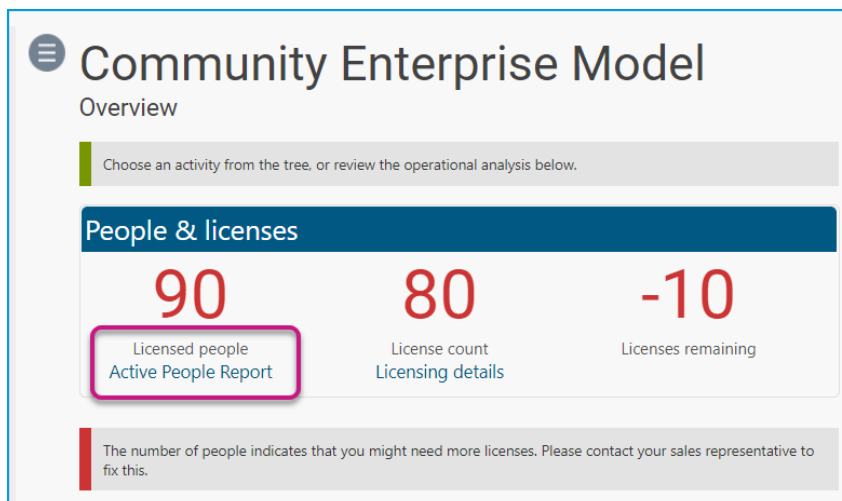
Each active user who participates in schedules (typically the agent role) counts toward the total number of allowed licenses. If a user leaves, it's best practice to **deactivate rather than delete** the agent so schedule and adherence data remains available for reporting. Deactivated users do not apply toward the total license count.

### Step-by-step

1. Go to Settings > People & agent templates > People.
2. Select the person you wish to deactivate.
3. In the *Advanced configuration* section, click *Go to agent employment transitions*.
4. Click *Create a new transition*.
5. In the *Transition type* drop-down, select *Deactivate* and enter the transition (deactivation) date.
6. Add a comment (required) and *Save*.

This will remove the agent from the active agent list. Deactivated users do not apply toward the total license count, and you have the option to reactivate the agent by creating a new employment transition.

**New in CommunityWFM version 5.1SP2:** To view a report of all people who apply to the license count, navigate to Settings > Enterprise Model. View your total license count and how many licenses remain then select *Active People Report* to view the details.



The screenshot shows the 'Community Enterprise Model' overview page. It features a 'People & licenses' section with three key metrics: 'Licensed people' (90), 'License count' (80), and 'Licenses remaining' (-10). The 'Licensed people' value is highlighted with a red box and a link to 'Active People Report'. Below the metrics, a message states: 'The number of people indicates that you might need more licenses. Please contact your sales representative to fix this.'

People & licenses		
90	80	-10
Licensed people <a href="#">Active People Report</a>	License count <a href="#">Licensing details</a>	Licenses remaining

The number of people indicates that you might need more licenses. Please contact your sales representative to fix this.

The report is color-coded and shows in red agents who were added after exceeding the license count. It also includes the option to Deactivate or Delete the agent from within the report.

### In product versions prior to 5.1SP2

To **deactivate** an agent, navigate to Settings > People & agent templates > People.

1. Select the person you wish to deactivate.
2. In the Advanced configuration section, click *Go to agent employment transitions*.
3. Click *Create a new transition*.
4. In the Transition type drop-down, select *Deactivate* and enter the transition (deactivation) date.
5. Add a comment (required) then *Save*.

449	McBride, Natasha	NNM17965	10 Jul 2016	Sales/Service Rep	Agent	0	nmcbride	Blair, Travis	Deactivate	Delete
440	Pollock, Mitch	MXP21277	15 May 2017	Sales/Service Rep	Agent	0	mpollock	Blair, Travis	Deactivate	Delete
432	Dunbar, Bill	wdunbar	15 May 2017	Sales/Service Rep	Agent	0	bdunbar	Blair, Travis	Deactivate	Delete
429	Turner, Bruce	bturner	15 May 2017	Sales/Service Rep	Agent	0	bturner	Blair, Travis	Deactivate	Delete

This will remove the agent from the active agent list and your license count but retain the profile, schedule, and adherence data.

To **delete** an agent, navigate to Settings > People & agent templates > People > Current list.

In the far-right column select *Delete*.




### People

Configure the people in your organization.

**Set up new people**  
Click here to create new people

**Import people from external systems**  
Click here to import people

**Advanced list options**  
Click here to show advanced sort and filter options

Name	Employee Id	Hire date	Title	Role	Tiebreak	Login Id	Active?	Email Address	Supervisor
 Account, Service		15 Nov 2017		Superuser	0	wfmsg	Active		
 Areheart, Sam	SCA21218	11 Jul 2016	Sales/Service Rep	Agent	0	sareheart	Active		Mitchell, Lauren
 Azzarito, Deborah	dka21094	21 Sep 2015	Sales/Service Rep	Agent	0	dazzarito	Active		Wildrick, Brian

This will permanently remove the person from the license count, but also remove all associated schedule and adherence data.

## Security

Allows setting up access permissions. Prior to adding securities, be sure to review the instructions and information about configuring securities.

## Extras for [agent name]

### Profile photos

Upload and adjust new profile photos, or review and approve/deny photos uploaded by the agent via Community Everywhere.

#### Upload a photo

Note: We recommend an image size of 100 pixels X 125 pixels. The application can automatically generate a thumbnail of the appropriate size if you select the checkbox below.

File name  
 No file chosen


**Image resize and rotate**

Automatically generate a thumbnail version of the appropriate size.

Do not rotate the thumbnail image (image is in portrait mode)

Rotate the thumbnail image 90 degrees counter-clockwise (left)

Rotate the thumbnail image 90 degrees clockwise (right)

Current approved photo	Name	Agent ID	Default/Delete
	Mosley, Kerry	145	<input checked="" type="checkbox"/> <input type="checkbox"/>

## External devices

Agents may add external phone and email addresses to receive system notifications. You may also add them for an agent here.

**Configure devices for Badgett, Gregory**

Community can forward copies of your system notifications using features of your smartphone or email. Simply set up the devices and / or email in the area below to start receiving your notifications instantly!

**When I receive a notification...**

Send a copy as a text message to...

Configured phones:

999-555-1212 - Cell phone  
[Edit](#) | [Delete](#) | [Deactivate](#)

Send a copy as an email to...

Configured email addresses:

gbadgett@email.com - Personal email  
[Edit](#) | [Delete](#) | [Deactivate](#)

Send a push notification to...

Configured push devices:

Apple iPhone13,3 (iPhone)  
[Delete](#) | [Deactivate](#)

## User group membership

Assign an agent to one or more custom user groups – used in reports, securities, and messaging.

Visit Settings > Application settings > People settings > Custom user groups to set up groups.

## Agent synchronization

This allows synchronizing agent work type, time zone, supervisor, PTO rules source, region (language), activity, security setting, and schedule templates. You can synchronize any or all of the properties to one agent or many, or set the properties of one agent to automatically sync to one or many others.

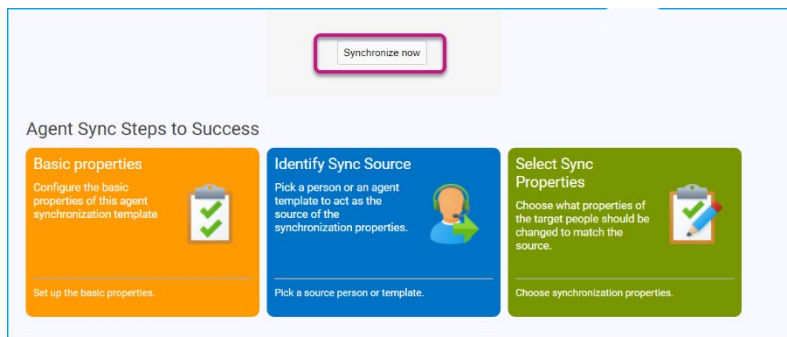
There are two sync options: automatic (using the auto-sync service) OR manual (using a wizard).

- **Automatic** uses a sync template where you specify a source and target(s) then turn on a service to monitor for changes to the source to apply to the target(s).
- **Manual** uses a wizard to select the properties to apply to selected agents.

### Automatic

Settings > People & agent templates > Synchronize people > Synchronization templates

1. Select *Click here to create a new agent synchronization template*.
2. Give it a name and description, then check the box to enable automatic updates. Save.
3. Click *Identify sync source*: Select an agent profile (for agent specific data) OR select agent template (for schedule templates) – you can only choose one.
4. In the pop-up, select the agent or profile to use as the source.
5. Click *Choose synchronization properties* then select the sync properties to apply by clicking +: supervisor, work type, time zone, activity tree, schedule templates, security, PTO rules source, region.
6. Click *Identify sync targets* then click *Choose people*: In the pop-up select by people by activity, supervisor, or manually select people.
7. If you need to remove some people from the list, click *Manage sync exceptions*.
8. **Note:** The synchronize now button in the middle of screen will synchronize manually according to the template.



9. To turn on the service: Settings > application settings > administrative settings > services > agent sync monitor service: Choose enable service = Yes; review the options then *Save*.

## Manual

**Note:** There is no "back" button in the wizard.

Settings > People & agent templates > Synchronize people > Synchronize people now and follow the agent synch wizard.

[Sign in to our support portal for more details: [Agent Synchronization Wizard](#)].

**Step 1:** Click *Next*.

**Step 2:** Choose site from your Enterprise Model.

**Step 3:** On the left side choose what to sync: default work type, time zone, supervisor, PTO rule, region.

For **each** option select *Do not synchronize...* or select an option. When finished click *Next*.

**Step 4:** Choose activity assignment to sync and click *Next* or click *Skip activities*.

**Step 5:** Choose schedule template to sync and click *Next* or click *Skip schedule templates*.

**Step 6:** Choose target people: by activity, supervisor, or manually choose people. Click *Next*.

**Step 7:** View settings then click *Synchronize agents*.

**Step 8:** View results.


## Send a message

Send a message to the agent using one or more notification channels.

Copy the 'tokens' to add customization such as first, last, or full name, or their supervisor's name.

### Send a message

Send a message directly to **Mosley, Kerry**.



### Message contents

#AgentFirstName# Please come see me when you get here.

#AgentFirstName#      #AgentFullName#      #AgentLastName#  
 #ResponsibleAgentFullName#

### Notification channels

Click the tiles below to include or exclude a notification channel.

🔔

📧

💬

✉️

📱

📺

📺

Send the message

## Attendance log

Select a date range to view the check in time for each day in the range.


Agent attendance report					
For Areheart, Sam					
From Sunday, 01 Sep 2024 Through Monday, 23 Sep 2024.					
Checkin status	Time	User	Delay	Scheduled event	Start time
Sunday, 01 Sep 2024					
No checkins found					
Monday, 02 Sep 2024					
Automated soft check-in	09:00 am	Account, Service	00:00	Work	09:00 am
Tuesday, 03 Sep 2024					
Automated soft check-in	08:40 am	Account, Service	-00:20	Work	09:00 am
Wednesday, 04 Sep 2024					
Automated soft check-in	08:46 am	Account, Service	-00:14	Work	09:00 am
Thursday, 05 Sep 2024					
No checkins found					
Friday, 06 Sep 2024					
No checkins found					

## Data subject rights

This is the area where you can complete a request to mask a user's data, export their data when requested, and view pending and completed data privacy requests.


For complete information about data subject rights, visit the support portal to [view the webinar devoted to this topic](#).

### Data subject rights options




#### Mask this user's data

Obfuscate this user's data so it can no longer be traced back to the individual person.



#### Export this user's data

Export all non-proprietary or company confidential information about this user to a comma-separated file.



#### Show data privacy requests

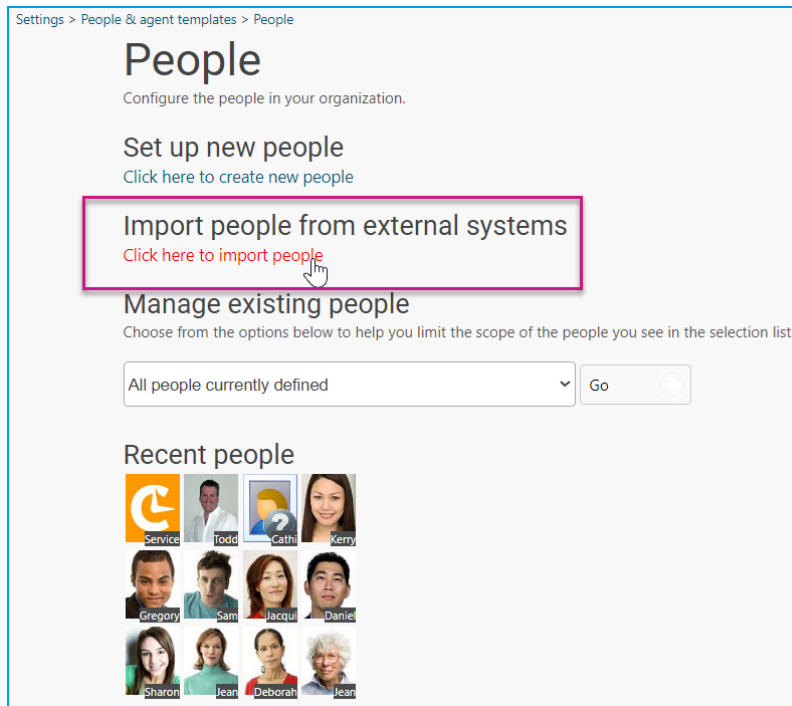
Show the history of data subject access rights requests from this user.

## Appendix 1: Import agents from Excel

**Essentials:** Go to Settings > People> People

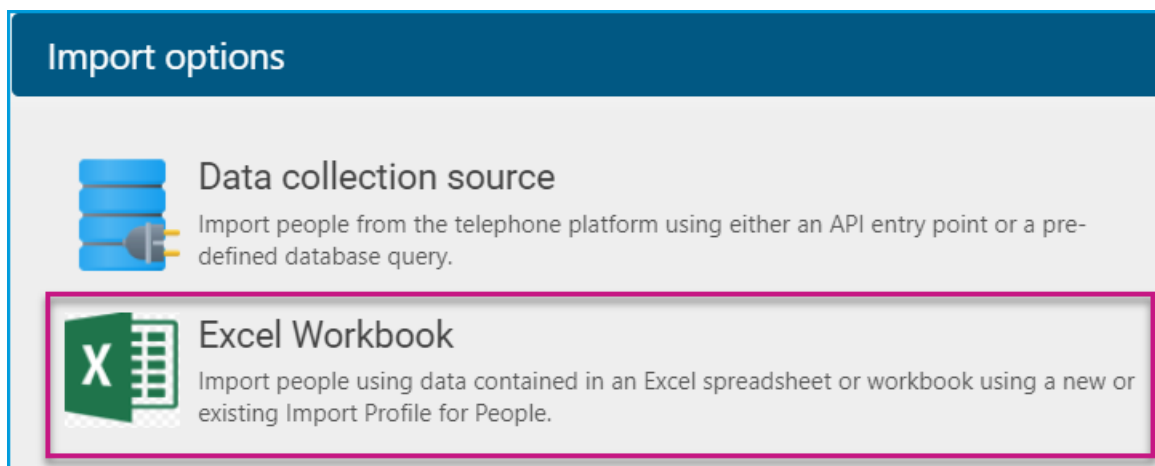
**Enterprise:** Go to Settings> People and agent templates > People.

On the People page, select *Click here to import people*.

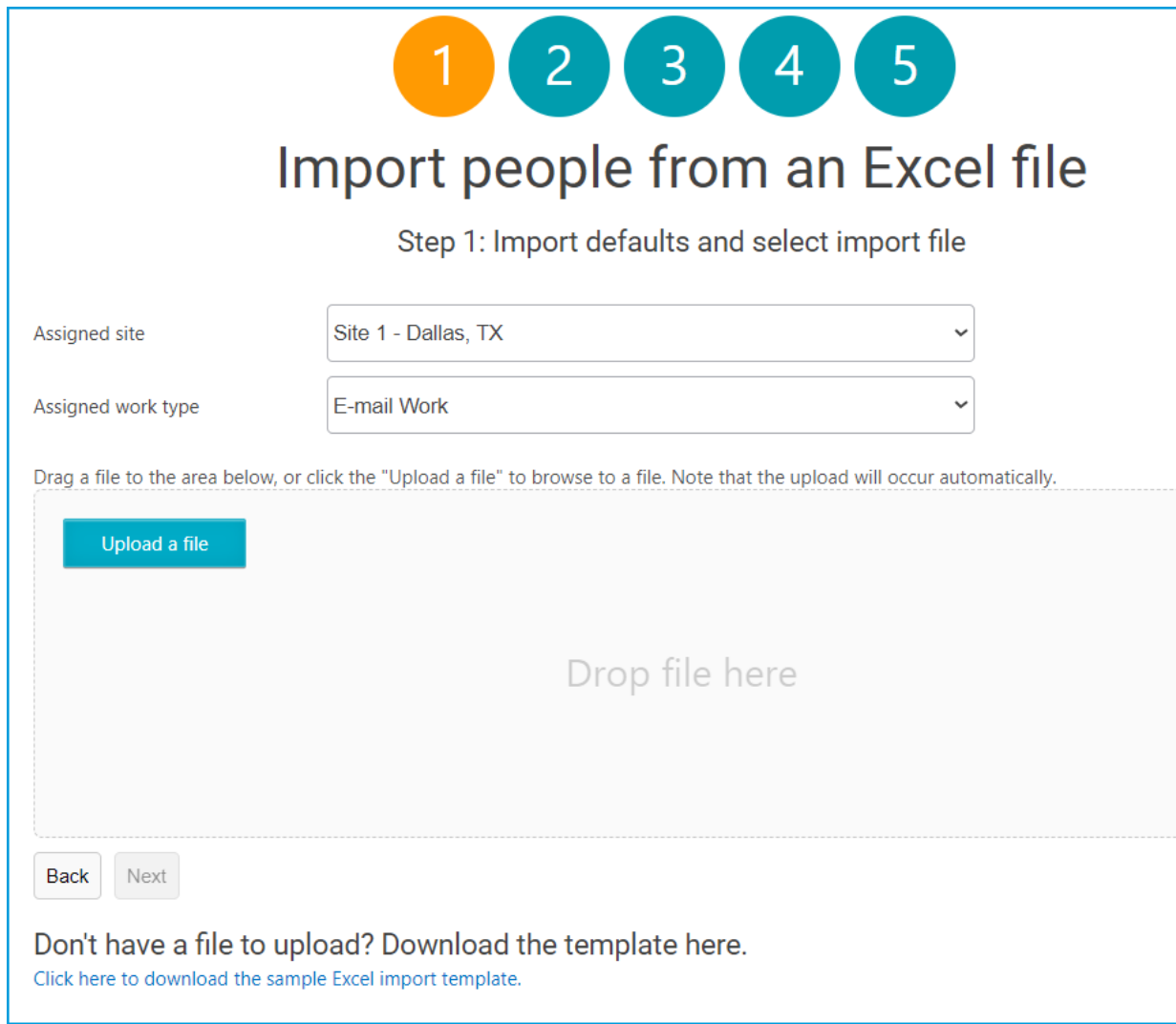


### Import Options

Select *Excel Workbook* from Import Options to launch the Excel Import Wizard.



## Step1: Import defaults and select import file



1
2
3
4
5

### Import people from an Excel file

Step 1: Import defaults and select import file

Assigned site Site 1 - Dallas, TX ▾

Assigned work type E-mail Work ▾

Drag a file to the area below, or click the "Upload a file" to browse to a file. Note that the upload will occur automatically.

Upload a file

Drop file here

Back
Next

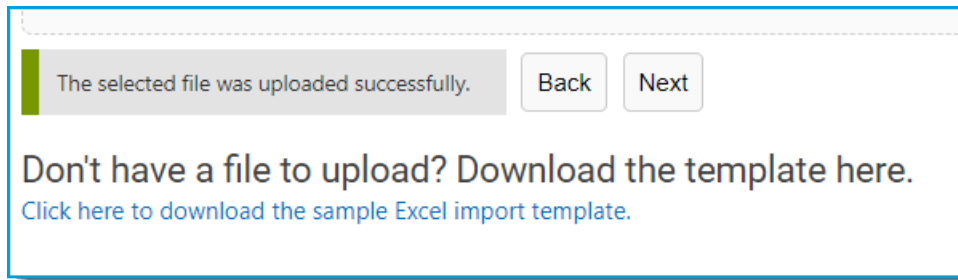
Don't have a file to upload? Download the template here.  
[Click here to download the sample Excel import template.](#)

All agents entered to Community WFM must have an assigned site and work type, among other properties. Before selecting a file for import, select a site and work type from the drop-down menus.

Community **Essentials** has one named site and three work types to choose from (E-mail Work, Overtime, and Work). *Work* is typically used for regular contact center phone work. Community **Enterprise** needs to have the Enterprise Model and work types defined before moving forward.

Next, upload a new Excel file or select a previously uploaded file. If this is the first time through the Wizard, Click *Upload a new file* or drag and drop a file into the window. The upload will start automatically.

After uploading a file, you will see confirmation that it was uploaded successfully.

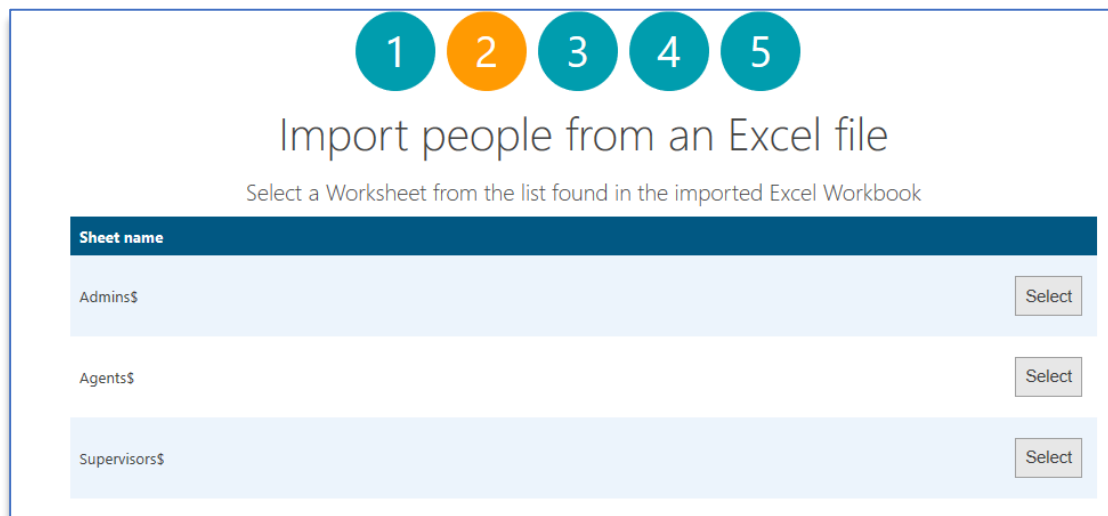


The file remains on the server. If you have previously uploaded files, you have the option to *Select an existing import file* and choose a file from the drop-down list.

After uploading a file or selecting an existing one, click *Next* to proceed to Step 2 of the wizard: *Select a Worksheet from the list found in the imported Excel Workbook.*

## Step 2: Select a Worksheet

The workbook example below contains worksheets labeled *Admins*, *Agents*, and *Supervisors*.

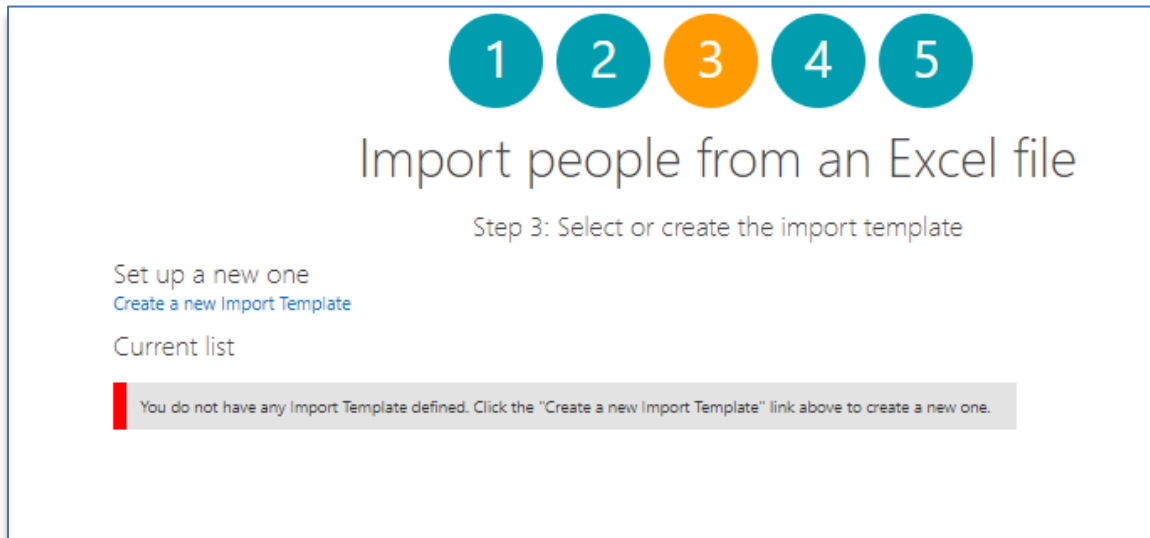


**Note:** All worksheet names have a dollar sign (\$) appended to the end.

Click *Select* next to the sheet that contains people data you wish to import to advance to Step 3: *Select or create the import template.*

### Step 3: Select or create the import template

Import templates are data maps where you can match columns from the imported worksheet to various people attribute fields needed by Community. If you have an Import Template defined select an existing Import template or click *Create a new Import Template* to create a new one.



1 2 3 4 5

## Import people from an Excel file

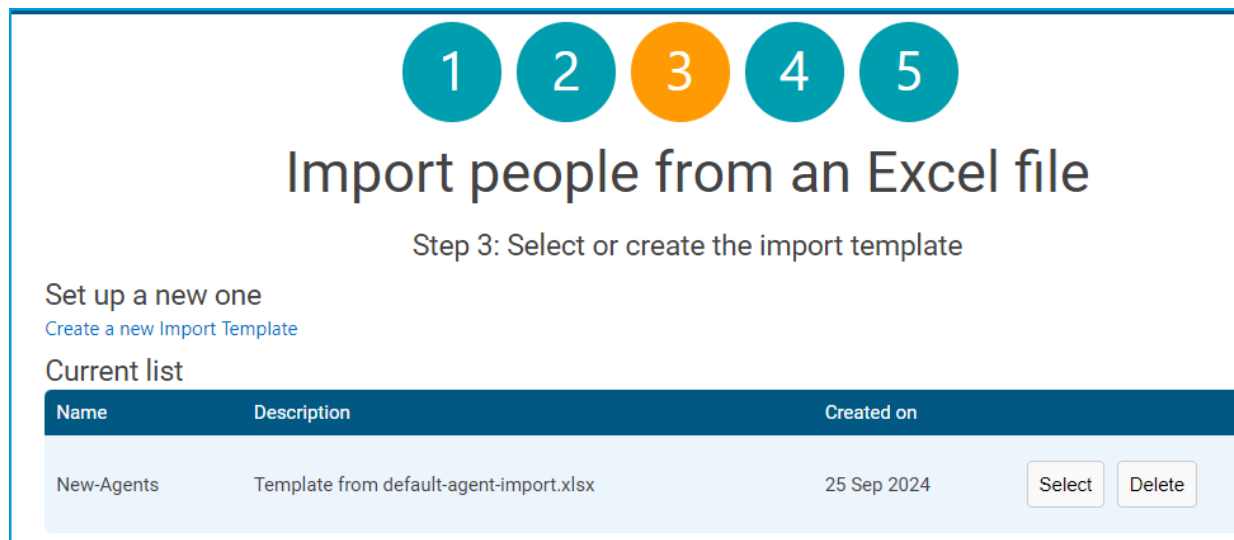
Step 3: Select or create the import template

Set up a new one  
[Create a new Import Template](#)

Current list

You do not have any Import Template defined. Click the "Create a new Import Template" link above to create a new one.

If you already have a template, click *Select* next to the Import name.



1 2 3 4 5

## Import people from an Excel file

Step 3: Select or create the import template

Set up a new one  
[Create a new Import Template](#)

Current list

Name	Description	Created on	
New-Agents	Template from default-agent-import.xlsx	25 Sep 2024	<input type="button" value="Select"/> <input type="button" value="Delete"/>

## Setting up a new Import Template

Click *Create a new Import Template*. This shows the column names and matching field names.

**New import template**

Selected file:

Import template name:

Selected sheet:

Field name	Required?	Type	Selected column
First Name	true	Text	<input type="text" value="First Name"/>
Last Name	true	Text	<input type="text" value="Last Name"/>
Middle Initial	false	Text	<input type="text" value="-- Ignore this field --"/>
Title	false	Text	<input type="text" value="-- Ignore this field --"/>
Email Address	false	Text	<input type="text" value="Email Address"/>
Supervisor First Name	false	Text	<input type="text" value="Supervisor First Name"/>
Supervisor Last Name	false	Text	<input type="text" value="Supervisor Last Name"/>
Login Id	false	Text	<input type="text" value="Login Id"/>
Tiebreak	false	Integer	<input type="text" value="Tiebreak"/>
Role	true	Text	<input type="text" value="Role"/>
Hire Date	true	Date	<input type="text" value="Hire Date"/>
Employee Id	false	Text	<input type="text" value="Employee Id"/>

For each attribute, use the corresponding drop-down list to select a column name from the imported worksheet that contains the matching data. **Note:** Only *First Name* and *Last Name* are required; Role and Hire date populate with defaults if they are missing.


**Pro tip:** upload supervisors first, then you can import agents and indicate their supervisors. You can only assign supervisors who are already in the system at the time of the agent import.

If you do not want to select a corresponding field, select *--Ignore this field--*.

When finished, click *OK*.

Community's import process requires validation of each row to create quality information for agents in the application.

Select the newly created template and proceed to step 4 of the Wizard.



## Import people from an Excel file

Step 4: Verify and import

Status	First name	Last name	Title	Email address	Hire date	Supervisor	
✘	Susan	Garcia	Agent	SG@work	06 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
A person with the same first and last name already exists in the system. Please ensure that you don't already have this person defined.							
✔	Greg	Kovak	Agent	GK@work	07 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
✔	Katy	Garcia	Agent	KG@work	08 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
✔	Lauren	Timmons	Agent	LT@work	09 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
✔	Annie	Noll	Agent	AN@work	10 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
✔	Harrison	Bratton	Agent	HB@work	11 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
✔	Tim	James	Agent	TJ@work	13 Jan 2018	Timmons, Susan	<input type="button" value="Import"/>
The imported row appears to be a valid user.							
✘	Susan	Garcia	Agent	SG@work	06 Jan 2018	N/A	<input type="button" value="Import"/>
Invalid or missing value for supervisor First or Last Name: assuming no supervisor. Invalid or missing value for Employee ID: assuming no Employee ID. A person with the same first and last name already exists in the system. Please ensure that you don't already have this person defined.							

## Step 4: Verify and import: Data Validation

On the next screen you will see the results of the validation process, which eliminates invalid rows and alerts you of any potential conflicts.



If the row's status icon is a checkmark, it is entirely valid and there are no problems.

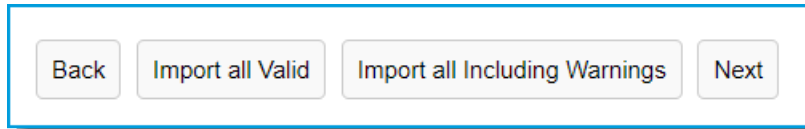


Some records show a warning red X, meaning the row did not contain a required value for one or more of the fields. You cannot import this person.



If there is a missing value there is a yellow warning X. People may be imported with a warning label, and you can complete missing information later.

Next, import people either individually by clicking *Import* on the right side of each row, or bulk import by choosing *Import all Valid* (just those with the valid icon), or *Import all Including Warnings* (all valid **and** with warning icons) then select *Next*.



## Step 5: Review of import results

The final step of the wizard is to review the results.

When you click *Finish* at the bottom, all people are imported. Navigate back to the People page, and you will see all the added people.



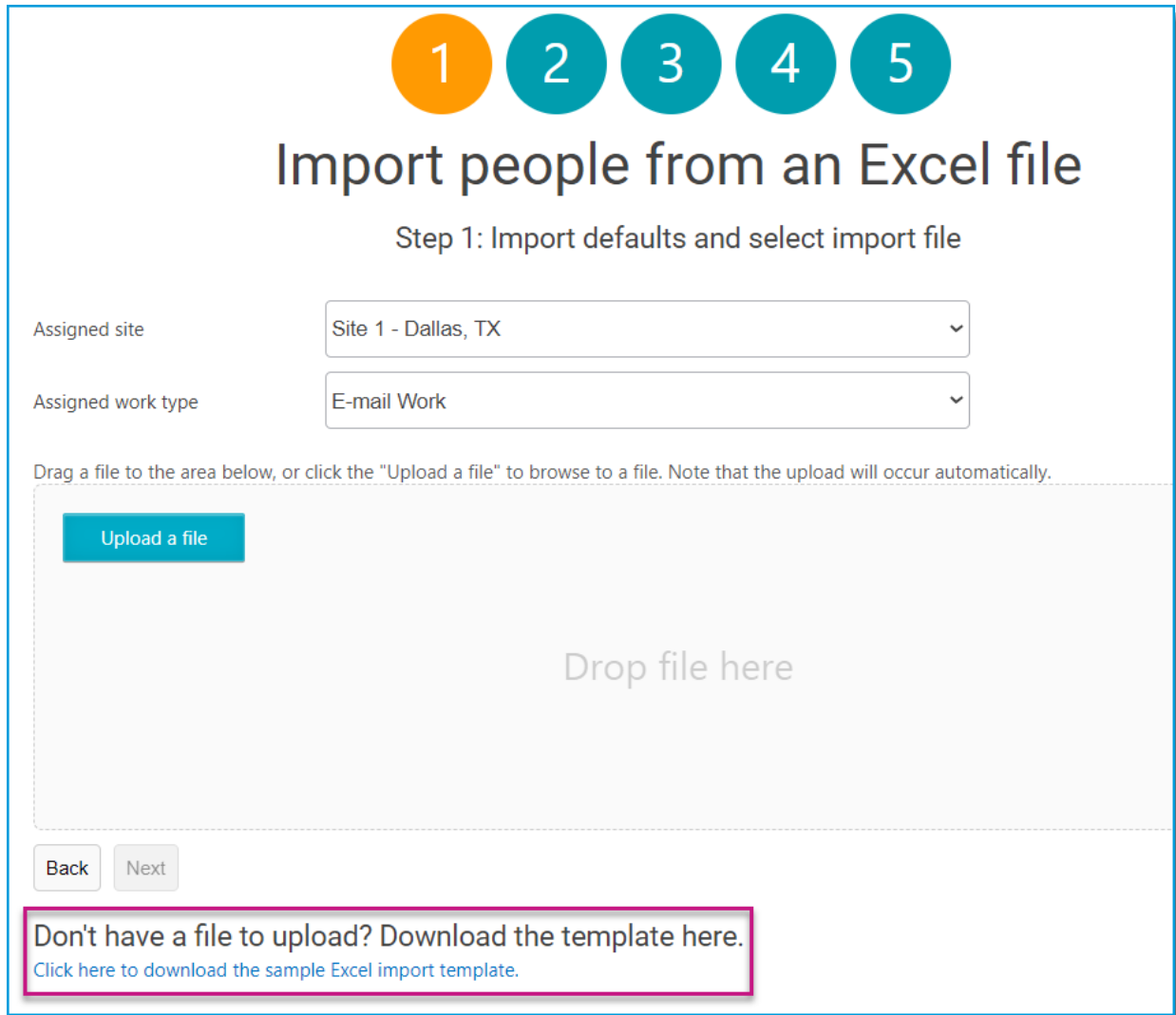
### Import people from an Excel file

Step 5: Review import results

Id	Full name	Title	Email address	Hire date	Role
599	Garcia, Susan E	Agent	SG@work	06 Jan 2018	Agent
600	Koviak, Greg J	Agent	GK@work	07 Jan 2018	Agent
601	Timmons, Lauren N	Agent	LT@work	09 Jan 2018	Agent
602	James, Tim L	Agent	TJ@work	13 Jan 2018	Agent
603	Garcia, Susan E	Agent	SG@work	06 Jan 2018	Agent
604	Noil, Annie E	Agent	AN@work	10 Jan 2018	Agent
605	Garcia, Katy M	Agent	KG@work	08 Jan 2018	Agent
606	Bratton, Harrison J	Agent	HB@work	11 Jan 2018	Agent

## Excel Import Template

If needed, you can download a copy of an Excel Workbook template in Step 1 of the wizard.



1 2 3 4 5

### Import people from an Excel file

Step 1: Import defaults and select import file

Assigned site: Site 1 - Dallas, TX

Assigned work type: E-mail Work

Drag a file to the area below, or click the "Upload a file" to browse to a file. Note that the upload will occur automatically.

Upload a file

Drop file here

Back Next

Don't have a file to upload? Download the template here.  
[Click here to download the sample Excel import template.](#)

Required fields (in red) are:

- First name
- Last name
- Hire date
- Role

	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	Middle Initial	Title	Email Address	Supervisor First Name	Supervisor Last Name	Login Id	Tiebreak	Role
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										

## Import agent: field names and descriptions

Field	Required?	Expected type & Description
First Name	Yes	String (50 characters) If missing, then the validator ignores the row
Last Name	Yes	String (50 characters) If missing, then the validator ignores the row
Middle Initial	No	String (1 character)
Title	No	String (255 characters)
Email Address	No	String (255 characters)
Supervisor First Name	No	String (50 characters)
Supervisor Last Name	No	String (50 characters)
Login ID	No	String (50 characters). Note <a href="#">the Login ID</a> must be UNIQUE across the population of people (users). If not, the validator will mark the row as in error.
Tiebreak	No	Integer; this is the tiebreak value used in various contexts including seniority scheduling
Hire date	Yes	Date This is the hire date for the person; if error then the validator assumes today's date.
Role	Yes	String (max 20 characters) This is the text version of these specific supported roles, including "Agent", "Supervisor", "Scheduler", "Administrator", "Superuser" If missing, or left blank, the validator assumes the "Agent" role.
Employee ID	No	String (50 characters)