



# Data Targets

Webinar handout

Version: February 20, 2025



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## About this document

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

## What are data targets?

CommunityWFM holds a wealth of data that you may wish to be consumed by other applications such as payroll systems, time clocks, budgeting applications, HR repositories, or other systems of record. Data targets are a comprehensive approach for scheduling the exporting of selected data sets from CommunityWFM for use with these 3rd party tools or for simple scheduled reporting that eliminates traditionally costly customized extraction and integration efforts.

Data targets allow you to schedule when and how much data to export with simple-to-adjust parameters. Data targets may be re-used and scheduled as many times as you need. There is no limit to the combinations you may use for any template.

You can build custom reports if there is no pre-defined report that exactly fits your needs, however, there is no user interface for doing so. Contact your support team for help with customizing a data target.

## Data target license

To determine whether you have a license for data targets, navigate to the Application info page (hover over your name) then select *Click here for licensing and activation details*. Select the *Features* tab. A license is in place if there is a green check mark next to *Data targets export function*.

**Licensing & activation**

This installation has been activated using license key: [REDACTED]

Overview People Data sources Products **Features** Show licensed features

Feature eligibility  
The following table shows the eligible, licensed features for this product activation.

Eligible?	Feature description
✓	Data targets export function
✓	SMS notification channel
✓	External email notification channel



## Creating data targets

**Report > Administrative & utility > Data targets**

Select [Click here to create a new data target](#). This will open the data target worksheet.

## Data target worksheet

### Basic properties

Choose **Data Target Type**. Options include adherence, call volume, data source logins, event status change, published forecast, published schedule, working forecast

You may want to familiarize yourself with each to ensure you choose the one(s) you need.

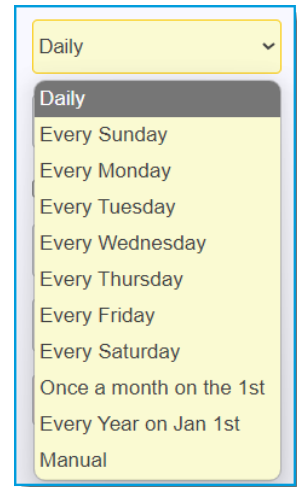
There are different ways to filter e.g., Adherence by Activity vs Adherence by Supervisor vs Adherence by Group.

Contact your support team if you need to create a custom template not included here.



1. **Friendly name:** Give the data target a name. CommunityWFM will export the report file with the friendly name as the file name, which will also include a date, timestamp, and table name. This ensures not overwriting a previous export.

2. Choose a **Collection Interval.** This determines how frequently CommunityWFM will export the data. The options are: Daily, Every Sunday, Every Monday, Every Tuesday, Every Wednesday, Every Thursday, Every Friday, Every Saturday, Once a month on the 1st, Every year on Jan 1<sup>st</sup>, Manual.



If you would like a report to run twice a week (for example, on Monday and Thursday), you would create 2 data targets, one with Every Monday and another data target with Every Thursday.

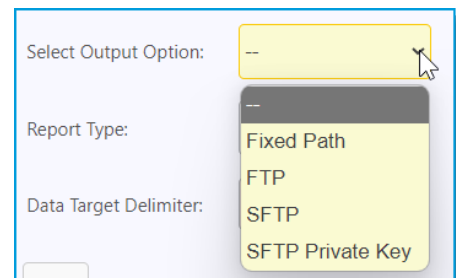
3. **Update time** is the local time the file will be exported.

**Note:** Assign a unique time to each data target running on the same day. If several data target jobs are set to run at the same time it could slow down your system.

The system recalculates the data every time the data target runs. This may take a few minutes or much longer if exporting several months' worth of data.

4. **Data Target Active:** Check this box if you want the report to export automatically.

5. **Select Output Option.** For each option, complete the additional fields. FTP or SFTP are the most used option for 3rd party applications.



You may need to engage your IT group to configure this option.

**Fixed Path** (Not recommended): If selected, add the **Output Path.** such as d:\data targets. This would export to the server itself so this option is not frequently used.

Select Output Option:

Output Path:



### FTP

Select Output Option:	FTP
FTP Host:	
FTP Username:	wfmsg
FTP Password:	.....
Output Path:	/

### SFTP

Select Output Option:	SFTP
SFTP Host:	
SFTP Username:	wfmsg
SFTP Password:	.....
Output Path:	/

### SFTP private key

Select Output Option:	SFTP Private Key
SFTP Host:	
SFTP Username:	wfmsg
SFTP PassPhrase:	.....
Private Key:	
Output Path:	/



6. **Report Type.** CSV (comma-separated value) is the only option. This is a user-friendly option, and this file type can be opened in Excel, notepad, etc.
7. **Data Target Delimiter.** This defaults to a comma (,) as this is the most frequently used option and is user-friendly. You can change to a pipe (|) and when you open the file in Excel, Excel will ask you to confirm the delimiter.

**Note:** You can't change this field after you save it. If you realize later that you entered the wrong delimiter, you must create a new data target.

8. Click *Save*.

After saving, the next section appears.

### Data Target Properties

#### Data Target Properties

Applies to activity:

Include data from:

Include data thru:

Data source selection:

Time zone selection: -- Default --

Employee classification selection: -- None --

Run report as:

1. **Applies to activity:** The options here vary based on the selected **Data Target Type**. If choosing Adherence History by Activity as the Data Target Type, this drop-down will include a list of activities. If Adherence by Supervisor, choose a supervisor here.



2. **Include data from:** This is relative to the current date. Options include Yesterday, Last Week, Last Month, Last Year, Today, Tomorrow, This Week, Next Month, Next Year.

3. **Include data thru:** This is relative to the current date and determines how far into the future to export the data.

If we choose *Include data from Last Week* and *Include data thru Yesterday* and the export is set to happen at midnight on Thursday, the exported data will include data from last Thursday to yesterday—a sliding 7 days.

4. **Data source selection:** Unless you have multiple data sources at your center you will only see one data source here. If you have multiple data sources, choose one.

5. **Time zone selection:** Default will select the corporate time zone from the Enterprise Model. Default is typically what you'll choose but you can choose any time zone in the list.

6. **Employee classification selection:** Default is *None*. Select one if you would like to limit the report to only one classification.

7. **Run report as:** This is an important setting. Best practice is to choose a high-level user such as Account, Service or Account, Support. If the selected user doesn't have access to all the activities, supervisors, or custom user groups (according to the option chosen in Data Target Type), the resulting exported data will not include information for the employees that this user doesn't have access to.







8. Click *Save*.

Now that your data target has been created, you can run it manually by clicking *Run Now* at the bottom of the page.



## Manage existing data targets

Report > Administrative & utility > Data targets

Manage existing data targets			
Description	Type		
 AdherenceHistoryByActivity	Adherence History by Activity	Delete	Run Now
 AdherenceHistorybySupervisor	Adherence History by Supervisor	Delete	Run Now
 Call-Volume-weekly	Adherence History by Activity	Delete	Run Now
 Customer experience	Call Volume by Enterprise	Delete	Run Now
 Kronos Daily export	Published Schedule – Daily Paid Time	Delete	Run Now
 Payroll Export	Published Schedule – Daily Paid Time	Delete	Run Now

You can modify, delete, or run now existing data targets.

To edit, click on the *Description* name to open the data target worksheet.

If you select *Run Now* and a data target is set to look at the past 7 days, it will look at today's date, not at the days in *Include Data From/Through* and will include a rolling week with a full week of data.

A red bar to the left of the Description indicates that the data target is inactive; a green bar indicates that it is active. Active data targets run automatically based on the parameters set in the data target worksheet. Inactive data targets must be run manually.



## Sample output

Below is a sample of the raw output from a data target formatted as CSV and then opened in Excel.

### Raw unformatted CSV Data

```
AgentId,AgentName,StartDate,Day1Paid,Day2Paid,Day3Paid,Day4Paid,Day5Paid,Day6Paid,Day7P
aid,TotalPaid
166,"Areheart, Sam ",12/1/2016 12:00:00 AM,0,0,0,0,0,0,0,0
137,"Azzarito, Deborah ",12/1/2016 12:00:00 AM,0,0,0,0,0,0,0,0
169,"Badgett, Gregory ",12/1/2016 12:00:00 AM,8,8,0,0,8,8,40
51,"Barton, Jean ",12/1/2016 12:00:00 AM,5.75,6,0,0,6.25,4.5,6.25,28.75
6,"Bickley, Sharon ",12/1/2016 12:00:00 AM,8,8,0,0,8.25,8,8,40.25
32,"Bixler, Lyon ",12/1/2016 12:00:00 AM,0,8,0,0,8,8,32
170,"Blakely, Latrice ",12/1/2016 12:00:00 AM,8,8,0,0,8,8,40
```

### Identical data set opened in Excel

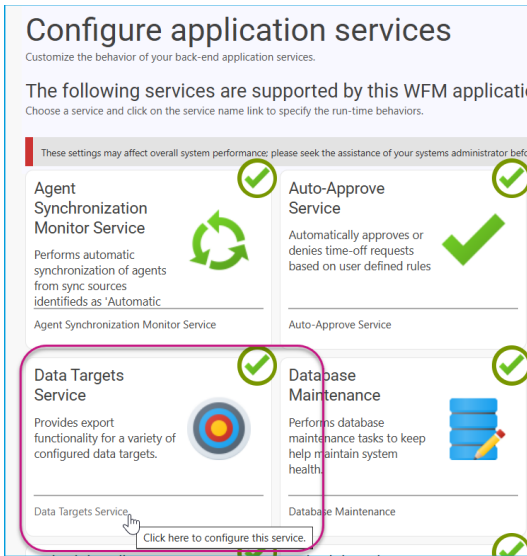
AgentId	AgentName	StartDate	Day1Paid	Day2Paid	Day3Paid	Day4Paid	Day5Paid	Day6Paid	Day7Paid	TotalPaid
166	Areheart, Sam	12/1/2016 0:00	0	0	0	0	0	0	0	0
137	Azzarito, Deborah	12/1/2016 0:00	0	0	0	0	0	0	0	0
169	Badgett, Gregory	12/1/2016 0:00	8	8	0	0	8	8	8	40
51	Barton, Jean	12/1/2016 0:00	5.75	6	0	0	6.25	4.5	6.25	28.75
6	Bickley, Sharon	12/1/2016 0:00	8	8	0	0	8.25	8	8	40.25
32	Bixler, Lyon	12/1/2016 0:00	0	8	0	0	8	8	8	32
170	Blakely, Latrice	12/1/2016 0:00	8	8	0	0	8	8	8	40



## Configure the data target service

To enable the data target to run, navigate to Settings > Application settings > Administrative settings > Services.

Click Data Targets Service to open the parameters window.



**Service enabled?** Select Yes to turn on the service. This will allow the data target to run automatically.

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

**Check for changes:** Select from 1–10 minutes, 15 or 30 minutes, or 1 hour. This checks for changes to the data target parameters.

**Check for run now flag:** Select from 5, 10, 15, or 30 seconds, or 1 minute.

