



CommunityWFM
A RingCentral company

All About Adherence

Webinar handout
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Table of Contents

About this document.....	3
What is adherence?.....	3
How does CommunityWFM AI WFM track adherence?.....	3
Requirements.....	3
Device states.....	4
Event type settings.....	5
Event type behaviors.....	5
Event type priorities.....	6
Employee profile – Device ID.....	7
Creating adherence thresholds.....	7
What are adherence alerts?.....	9
Adherence reports.....	10
Daily Schedule Adherence.....	10
Adherence Alerts Report.....	11
Adherence alerts report options.....	13
Adherence alert display type selection.....	15
Adherence and state summary.....	16
Examples of adherence violations.....	17
Report item definitions.....	17
Check box and yield icons in thumbnail alerts.....	17
Box outline in thumbnail reports.....	17
Icons in list alerts.....	18
Scheduled event and Scheduled time.....	18
Actual state and Start time.....	19
Adherence violation.....	19
Agent login.....	19
Additional examples.....	19
Schedule adherence history.....	21
Schedule Adherence Summary.....	21
Device State Transaction Detail.....	22
Daily Paid Time.....	23
Schedule Adherence Comparison.....	23
Schedule adherence monitor.....	24
Agent View.....	25
Schedule adherence summary.....	26
Daily schedule adherence.....	26
Device state detail report.....	26
FAQs.....	27



How long does CommunityWFM AI WFM store adherence data?.....	27
Why does the adherence line on an agent's schedule look like a colorful barcode?.....	27
Can I modify the adherence phone states?.....	27
Why doesn't adherence = 100% when an agent's adherence line is green all day?.....	28
Is there a report to see 'unaccounted for' time?.....	28
Why is there a discrepancy between the schedule adherence and historical schedule adherence reports?.....	28
Why is there a discrepancy between the schedule adherence history and the schedule adherence summary reports?.....	28



About this document

This document accompanies the CommunityWFM | AI WFM College webinar *All About Adherence*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

What is adherence?

You've worked hard to forecast and schedule appropriately to the expected volume, now how closely do agents stick to their schedule? Do they arrive and log in on time? Leave and return from breaks and lunch according to the plan? This is adherence.

How does CommunityWFM | AI WFM track adherence?

Requirements

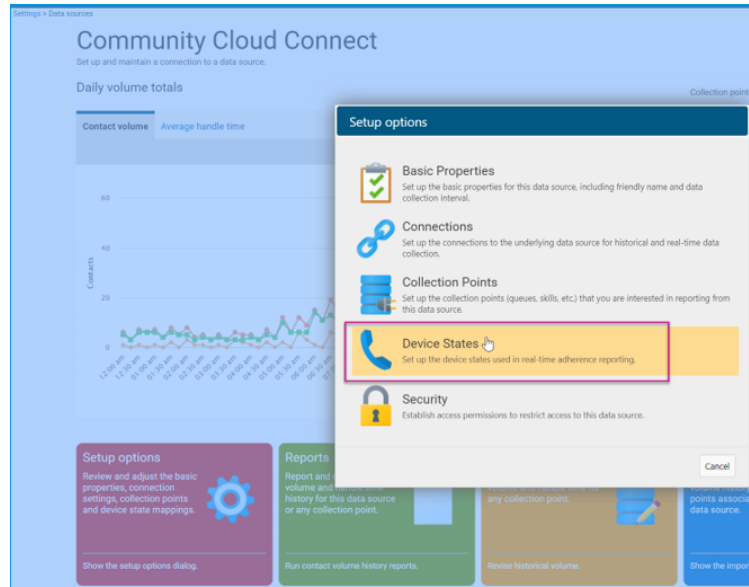
To calculate and report adherence:

- The agent must have a schedule in place.
- In the agent profile, Step 4: Adherence setup must have a single active default data source.
- The data source must be sending real-time device state data to CommunityWFM | AI WFM.
- Consider event layering: the Event priority for events must not be the same as the default work type event. Settings > Application settings > Event type settings > Event types > Step 1: Event type properties.



Device states

To view the device states for your data source, navigate to Settings > Data sources > Select your data source > Setup options tile. Click *Show the setup options dialog*, then select *Device States* from the pop-up menu.



This list shows each State name, the State type (in queue, out of queue, ignore, unknown, invalid), a description, and the color that will display in the 'third rail' adherence bar when viewing adherence reports. The states are originally imported as *Unknown* and were likely set up during the original onboarding sessions for the center.

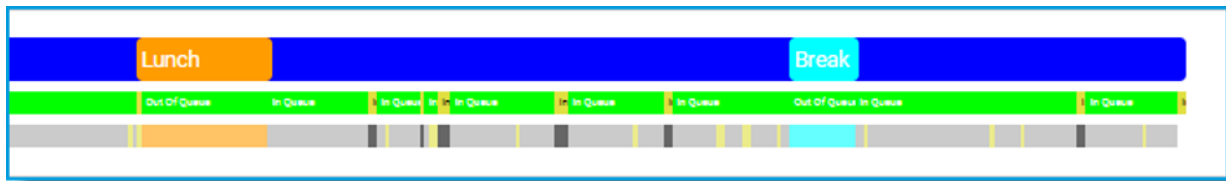
Configure real-time agent state mappings			
State	State type	Description	Color
acd call	In Queue	On ACD Call	Grey
acdagentnotanswering	Out of Queue	AcdAgentNotAnswering	Red
at a training session	Out of Queue	At a training session	Lavender
at lunch	Out of Queue	At Lunch	Orange
available	In Queue	Available	Grey
follow up	In Queue	Follow Up	Grey
follow up - extended	In Queue	Follow Up - Extended	Yellow
New State Mapping Reset to default states Copy Unknown States from data			



State types of *Invalid* and *Ignore* function in basically the same way and look at the previous state for the employee.

Unknown will still be reported but will show a status value of '2000' and will be considered 'out of queue.'

The color listed in the table will show in the reports in the schedule bar. For a state such as *Gone Home* where an agent is out of queue and not available, using – None --for color will keep the report cleaner.



Event type settings

Settings > Application settings > Event type settings > Event types

Event type behaviors

How does the in queue/out of queue/ignore in the device state relate to the events on the schedule?

Within Step 2: Event type behaviors > Custom behavior settings tab there is a question that relates to real time adherence.

Question 8: *For real time adherence, should agents be considered logged into queue during events of this type?*

An agent is **in adherence** if an event on their schedule has Question 8 = No and the agent is in a device state marked as out of queue. If Question 8 = Yes and the agent is in a device state marked as in queue, the agent is in adherence. However, an agent is **out of adherence** if Question 8 = Yes but they are in a device state marked as out of queue, or if Question 8 = No and they are in a device state marked as in queue.



If we put an event on the schedule that is marked as out of queue (Question 4: Is the scheduled agent logged into a queue during events of this type? = No) and Question 8 = No, then the agent is in adherence (because the schedule says not in queue and the phone state says not in queue, thus “in adherence”). That’s not how we want to report that kind of time. It should be that way for the purposes of HEADCOUNT (over/under reports) that the person is NOT counted, but for adherence that time should be considered “In queue” because the agent should have been in queue but wasn’t.

CommunityWFM | AI WFM supports a hybrid view of events related to adherence / headcount to allow the adherence reports to reflect out of adherence but also to not count that agent as in queue during the period.

Answer the following questions to determine the behavior of this event type.	
Manually select the behavior options for this event type.	
	YES NO
Can this event type be used as a default work type?	☒ ☐
Does this event occur at work / on site?	☒ ☐
Is this event type's start time and duration constrained by an agent work type event?	☒ ☐
Is the scheduled agent logged into a queue during events of this type?	☒ ☐
Does this event type require supervisor approval?	☒ ☐
Are agents available for callback into queue during events of this type?	☒ ☐
Do events of this type travel with agent schedule swaps?	☒ ☐
For real-time adherence, should agents be considered logged into queue during events of this type?	☐ ☒
Is this event type available for agent selection in the Agent Self-Service Kiosk?	☒ ☐
If eligible for Agent Self-Service Kiosk, does this require runtime validation?	☒ ☐

Save behaviors Clear selections

Event type priorities

In the basic properties Step 1: Event type priorities, the event priority for the event must not be the same as the default work type. The event priority number determines which event supersedes another when two or more events overlap. The agent is expected to adhere to the event type with the highest priority.

Event priority

- 300 - Off Site
- 1 - Default Work Type
- 25 - Secondary Work
- 100 - Break
- 200 - Meetings and Trainings
- 300 - Off Site
- 900 - Lunch

this from lists



Employee profile – Device ID

Settings > People & agent templates > People > Personal profile > Adherence setup for [agent name]

There must be a device ID for the default data source. Click *Edit* to change the device ID and select the default data source.

Data source active?	Data source name	Data source type	Device ID	Default?	
✓	Community Cloud Connect	I3	mstalnaker	✓	<button>Edit</button>

If an agent does not have a designated default Device ID, they will not have adherence data to display.

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

Creating adherence thresholds

Settings > Application Settings > Adherence Thresholds



The adherence threshold displays whether an agent is adhering to their schedule and how long an agent has been in and/or out of adherence (*in queue* and *out of queue*). Each center determines the threshold amounts and the display colors. A typical set up is a “stoplight”: Green = in adherence; yellow = out of adherence for greater than 0 minutes; red = out of adherence for greater than 10 minutes.

While only one threshold can be default, you can set up additional thresholds to use when running a report (e.g., if an admin only wants to see those who are out of adherence for more than 20 minutes).

STEP-BY-STEP

Step 1: Basic properties

Settings > Application Settings > Adherence thresholds

1. Select *Click here to create a new adherence threshold*.
2. If you want to see 3 colors—green, yellow, and red— name it *Stoplight* and check *Use these adherence thresholds as the default for reports*.
3. Click *Save*. If editing an existing threshold to create a new one, click *Save a copy*.

Settings > Application settings > Adherence thresholds > New adherence threshold

Adherence threshold

Customize your adherence reports by defining adherence thresholds.

Step 1: Basic properties

Name

Description

☐ Use these adherence thresholds as the default for reports

Save Save a copy

Step 2: Intervals

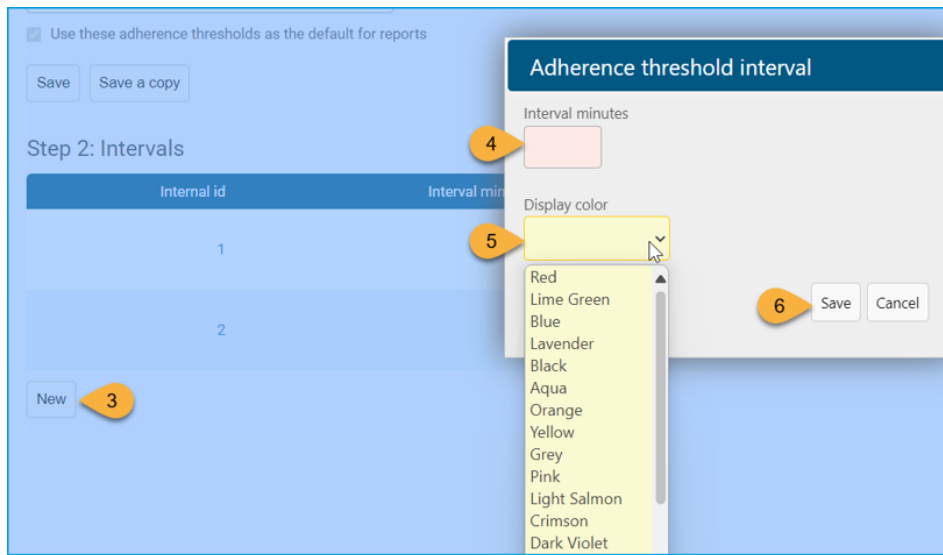
This is our recommendation for thresholds.

Set up the adherence threshold for yellow and red. Green is already a default for in queue.

1. Select *New*.



2. Leave interval as 0, assign the color yellow, and Save. This will ensure that you see all out of queue intervals.
3. Select *New*.
4. Enter the interval of time when agents will be considered out of queue (e.g., 5 minutes).
5. Assign color red.
6. Save.



What are adherence alerts?

Adherence alerts allow creating unique alerts based on a specific activity in one or multiple locations.

Set your own refresh time for alerts based on your system configurations in the Global settings & preferences (5-, 6-, 7-, 8-, 9-, 10-, or 15-minute intervals). The second question relates to the intraday performance monitor report.

Settings > Application settings > Global settings & preferences > Adherence Reporting

Adherence Reporting

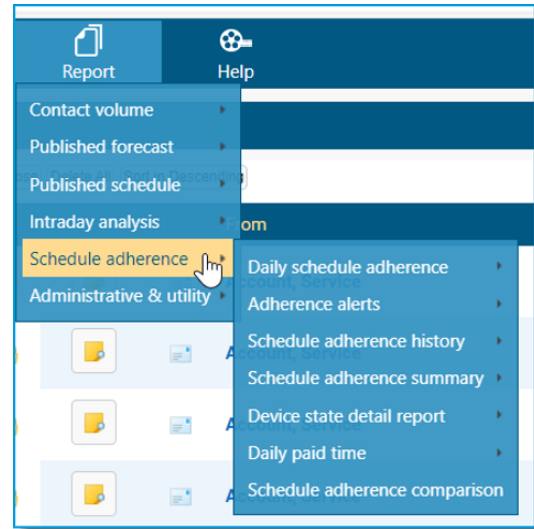
Page refresh interval for adherence reports: Automatically refresh every 5 minutes. ▾

Ignore prior intervals in intraday projections: Do not ignore prior intervals when projecting future intervals ▾



Adherence reports

The adherence reports have more information than the published schedule report and you can still do many of the same things as in a published schedule report such as viewing service metrics, adding or editing schedule events, and creating ASAPs.



Daily Schedule Adherence

This is your main adherence report.

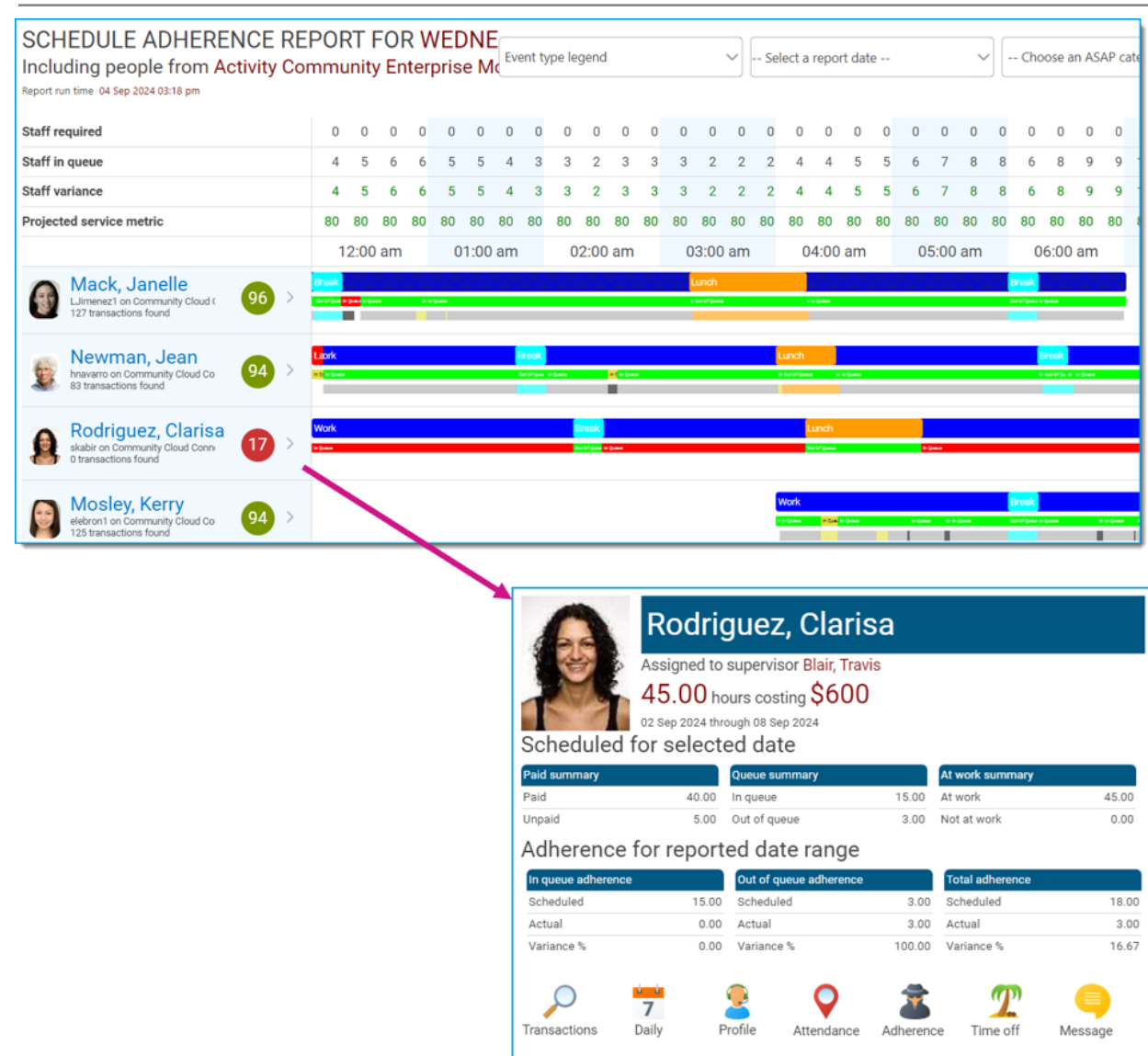
Hover over any segment on the adherence line and you'll see in queue/out of queue or out of queue/in queue and the difference. Every minute of the day CommunityWFM | AI WFM is looking at *what is their schedule event?* and *Is this schedule event in queue or out of queue?* Then it tells you what phone state they were in.

To verify what the agent was doing during a shift: Click on the greater than symbol (>) beside the agent's name then the magnifying glass (transactions) to view the log in/log out report for the day.

The bottom line of the schedule bar is also known as the third rail. It's a handy color code by phone state.

- Agents see the third rail in their adherence report as well as the first and second rail.
- Remember that a 95% adherence goal for an 8-hour day gives the agent 24–30 minutes to be off the phone outside of breaks and lunch.

The number in the circle reflects the overall adherence for the agent for the day. Clicking the greater than symbol (>) will pop out details for the agent.



Adherence Alerts Report

Report > Schedule adherence > Adherence alerts

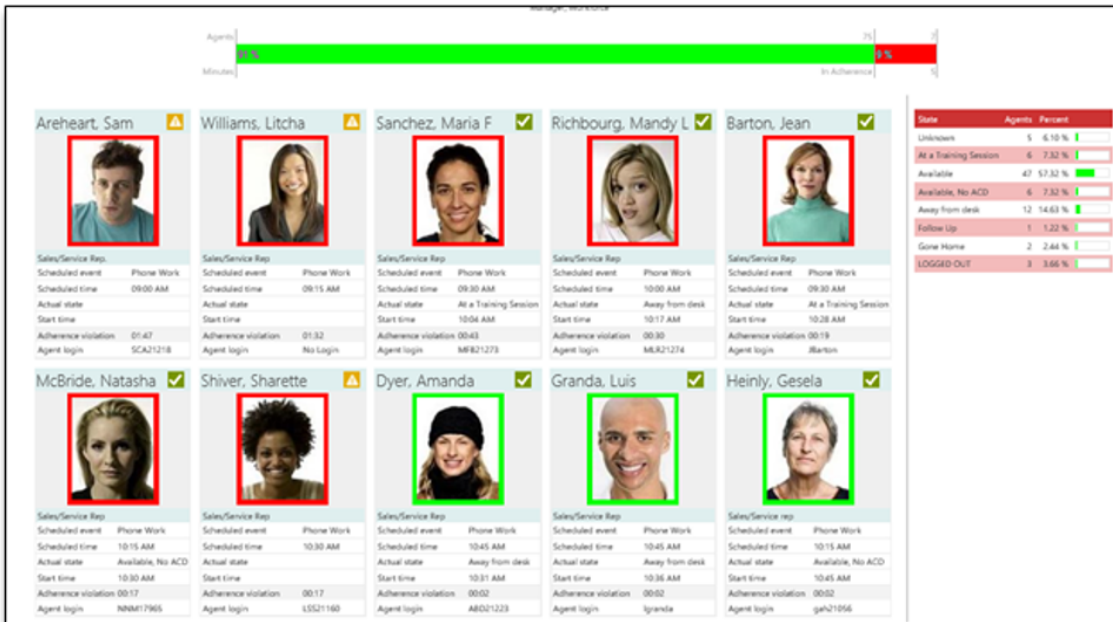
This popular report gives a summary of how many people are in each phone state and is a valuable tool for monitoring agent adherence in near real time conditions.

Much of this information is available in the Schedule Adherence Monitor module on your Today page.



Enterprise Model and Organizational Model versions of the report enable drilling down to the specific agent population you wish to monitor.

Below is an example of a real time adherence (RTA) report with active data.





Adherence alerts report options

Agent adherence alerts report
Specify the report parameters below and then press "Regenerate Report" to produce the report. Note that the report will appear in a new browser window.

Sort option
Out of Adherence Time ▾

Sort option
Out of Adherence Time ▾
Agent Name
Out of Adherence Time ▾

Applies to activity
Site 1 - Dallas, TX ▾

Employee classification selection
-- No Selection -- ▾

Data source selection
-- Default -- ▾

Adherence threshold selection
Stoplight ▾

Event type selection
-- No Selection -- ▾

☒ Suppress display of agents who are currently In Adherence

Report refresh interval
Automatically refresh every 5 minutes. ▾

Display type selection
Show alerts using thumbnail view ▾

Columns per row
4 ▾

Time zone selection
Use my default time zone ▾

Regenerate report

Sort option: Choose between default of *Agent name* (alphabetical) and *Out of adherence time*.

Applies to activity: Select from Sites and Activities or Supervisor(s), depending on report version selected (Enterprise or Organizational Model).

Employee classification selection: Filter by employee class. Default is no classification.

Data source selection: Default is the default data source as assigned within each agent profile or choose a specific data source.

Adherence threshold selection: This is the display color for the report. Default value is defined by the default threshold specified in the adherence threshold listing in the *General settings & preferences* menu. You may select an alternate threshold grouping.



Event type selection: Default (*No selection*) will show all. You may elect to display only specific work types such as *Work*. This eliminates the display of agents not in adherence when scheduled for off-phone events such as breaks and lunch.

Suppress display of agents who are currently in Adherence: Selected by default; only shows agents who are out of adherence.

Report refresh interval: Default is based on the global setting (Settings > Application settings > Global settings & preferences > Adherence Reporting) or you can change it here.

Display type selection: Choose between Thumbnail View (with agent pictures) or Classic View (a list view).

Time zone selection: Default is *Use my default time zone* or you can change to corporate or selected time zone.

After clicking *Regenerate report* it will open in a new browser window.

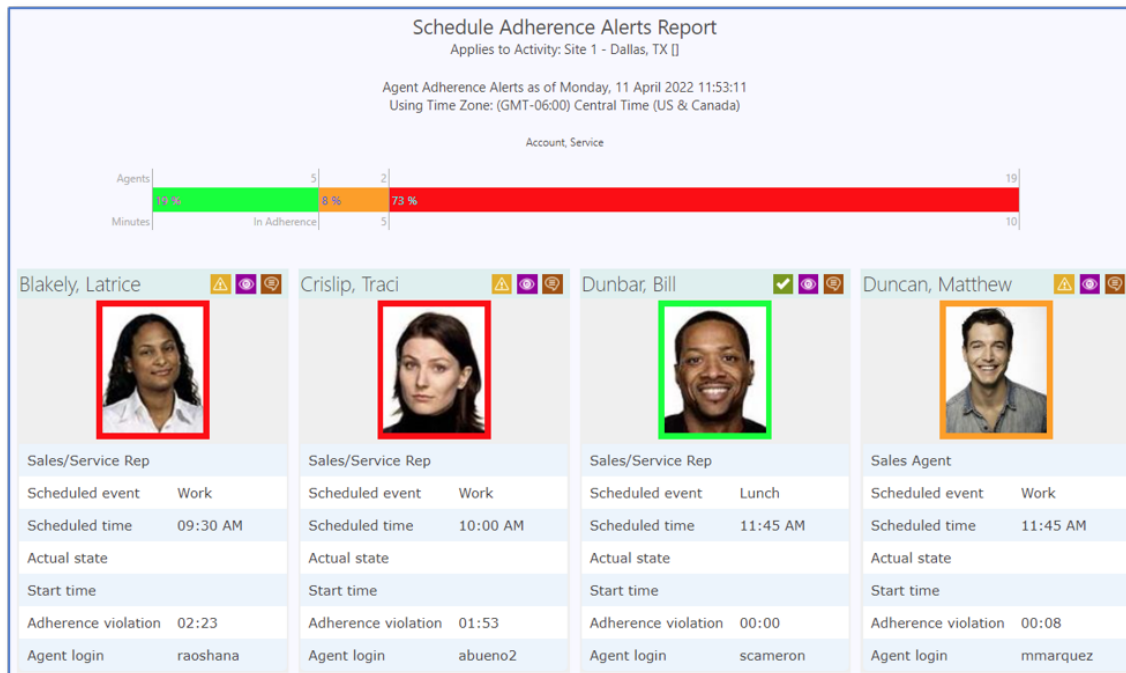
By default, this report only shows if the agent is **out** of adherence, and the color around their photo shows how far out of adherence: Uncheck the box next to *Suppress display of agents who are currently In Adherence* before opening the report if you want to see everyone.



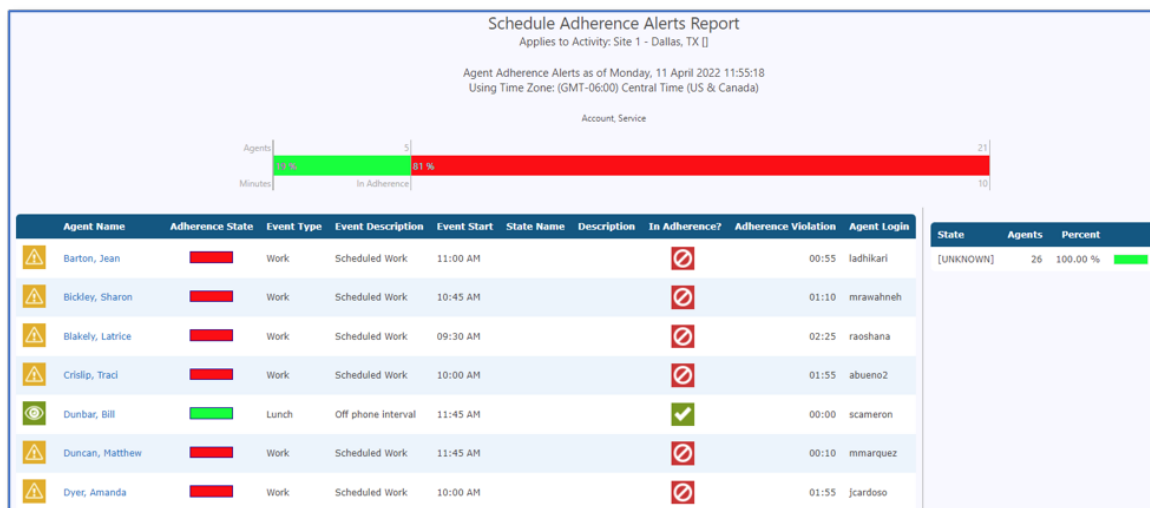
Adherence alert display type selection

Thumbnail view example

Includes hyperlinks for each agent to launch their state transactions details and messaging.



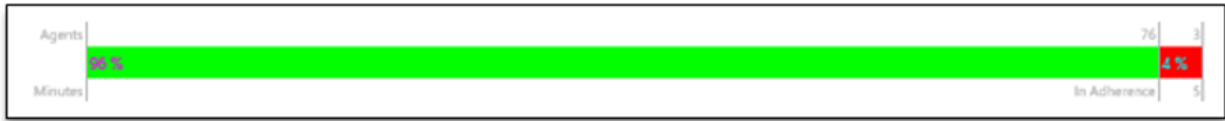
Classic view example





Adherence and state summary

At the top of the Alerts page is an adherence summary. If all agents are in adherence, the bar will display all green and report 100%.



The Alerts Report also displays a list of all current agent work states with the number of agents in each state and the percentage in each state.

State	Agents	Percent
Unknown	4	5.06 %
Available	62	78.48 %
Available, No ACD	5	6.33 %
Away from desk	1	1.27 %
Follow Up	1	1.27 %
Gone Home	3	3.80 %
LOGGED OUT	3	3.80 %

Note that the green color in the red summary box does not represent that all agents are in adherence or not in adherence; it is a bar showing how many are in that state. Multiple agents can be in the same state with some scheduled to be in that state and others not scheduled.



Examples of adherence violations

Bickley, Sharon 



Sales/Service Rep	
Scheduled event	Break
Scheduled time	09:45 AM
Actual state	Away from desk
Start time	09:46 AM
Adherence violation	00:00
Agent login	dika21094

Hampton, Stacey R 



Sales/Service Rep	
Scheduled event	Phone Work
Scheduled time	08:00 AM
Actual state	
Start time	
Adherence violation	01:57
Agent login	shampton

Cathy, Kelly 



Sales/Service Rep	
Scheduled event	Phone Work
Scheduled time	08:00 AM
Actual state	Available, No ACD
Start time	08:13 AM
Adherence violation	00:04
Agent login	CXP21252

Report item definitions

Check box and yield icons in thumbnail alerts

An agent with work state transactions for the current day will have a green checkmark in the upper right corner. Note the actual state and the start time of the event in Sharon Bickley.

A yellow exclamation mark indicates that no work states are found for an agent. In the example there is no *Actual state* or *Start time* for Stacey R Hampton.

Note: the yellow exclamation has a different meaning than the yellow exclamation found in the Reporting of Today's Adherence. In Today's Adherence, the yellow triangle means there are no reported work states for the agent for the entire current day.

Box outline in thumbnail reports

The outline of the agent's profile picture will display green if the agent is in adherence or has not yet reached the defined adherence threshold.

When an agent is out of adherence, the color of the outline will change depending on the color settings defined within the selected adherence threshold, which is set up under Settings > Application Settings > Adherence Thresholds.



In the example, Kelly Cathy has been out of adherence for fewer than five minutes and only agents out of adherence for five minutes or more will have a red box outline.

Icons in list alerts

The list icons in the classic view vary slightly from the thumbnail view:



Represents the agent is in an ACD work state.



Represents the agent not being in any current work state.



Represents the agent not in adherence.



Represents the agent is in adherence.



Represents the color of the threshold setting assigned to the duration of adherence infraction.

Scheduled event and Scheduled time

The *scheduled event* and the *scheduled time* are from the agent's assigned schedule.

Scheduled event	Phone Work
Scheduled time	08:30 AM



Actual state and Start time

The *Actual state* and *Start time* are the state and time being sent or captured as reported by the ACD. How and what states are captured and collected from an ACD depends on the ACD. These states are mapped in the WFM database and defined by the WFM team as in queue or out of queue.

Actual state	Available, No ACD
Start time	08:55 AM

Adherence violation

Adherence violation 00:03

The *Adherence violation* reports the number of hours : minutes the agent has been out of adherence. If less than one minute, the violation will display as 00:00.

Agent login

Agent login lswilliams

The *Agent login* represents the ACD login of the agent as defined in the agent's profile.

If the agent has no login, the agent will display with "no login" and no actual state.

Additional examples

In this example, Bill Dunbar is supposed to be active on ACD calls but is in an out of queue work state (follow-up) so he is out of adherence. Because he has been in his out of queue state for less than one minute, his reported adherence violation is 00:00 and his picture has a green border.

Dunbar, Bill

Sales/Service Rep

Scheduled event	Phone Work
Scheduled time	08:00 AM
Actual state	Follow Up
Start time	08:49 AM
Adherence violation	00:00
Agent login	wdunbar



Litcha Williams is scheduled for phone work but there is no login defined in her profile setup (*No Login*), no actual state or start time, and shows an out of adherence violation for the start time of the phone work event. Also note the yellow triangle representing no phone work state.

Williams, Litcha



Sales/Service Rep

Scheduled event	Phone Work
Scheduled time	09:15 AM
Actual state	
Start time	
Adherence violation	00:20
Agent login	No Login

Polly Rawl is scheduled for a break starting at 9:30. However, she has been in an available in queue state since 9:28 and the current time is 9:35. Thus Polly is out of adherence for five minutes.

This is an example of an alert that would NOT be displayed if the reporting parameters had been changed when launching the report to display only alerts for agents scheduled for phone work.

Rawl, Polly



Sales/Service Rep

Scheduled event	Break
Scheduled time	09:30 AM
Actual state	Available
Start time	09:28 AM
Adherence violation	00:05
Agent login	prawl

Polly has now left for break at 9:35 and remains on break at 9:49. Because she was scheduled to return from break at 9:45, she is now out of adherence for four minutes.

The adherence threshold setting is set to five minutes, so Polly will still display with a green border.

Rawl, Polly



Sales/Service Rep

Scheduled event	Phone Work
Scheduled time	09:45 AM
Actual state	Away from desk
Start time	09:35 AM
Adherence violation	00:04
Agent login	prawl



Schedule adherence history

Report > Schedule adherence > Schedule adherence history

****We do not recommend using this report because the agents see the summary data.****

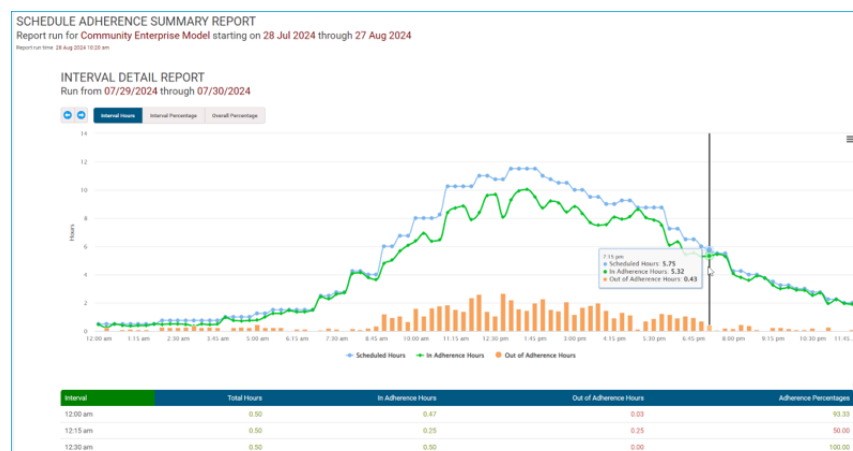
- This report opens in a new browser window. The results are presented as adherence scores by person and by date for the selected date range.

Schedule Adherence Summary

Report > Schedule Adherence > Schedule adherence summary

This is the report to use for coaching and matches the data that agents see on their homepage.

The tiles at the top allow viewing by different intervals and by hour or percentage.





Daily Paid Time

Report > Schedule Adherence > Daily Paid Time

This is the same report as under Published Schedule Reports. This report also reflects adherence time (in and out), as well as scheduled paid and unpaid time. It shows a little more information than the published schedule report with the same name.

Schedule Adherence Comparison

Report > Schedule adherence > Schedule adherence comparison

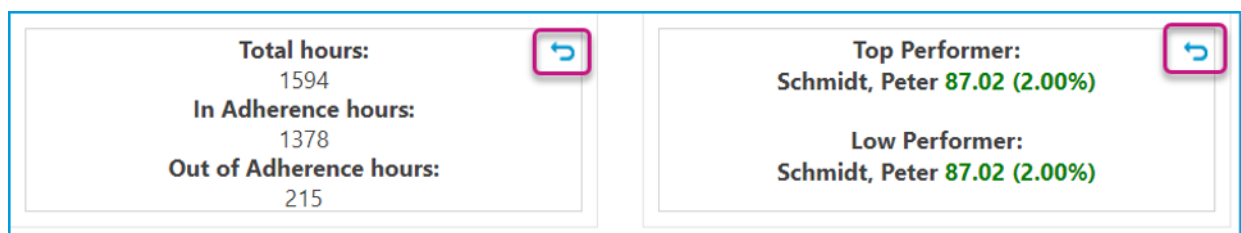
Using the summary adherence data, the comparison report allows selecting up to five people or groups to compare adherence for a specified date range. From an executive summary to individual details, see the top and low performers for each group, trends, in and out of adherence hours, etc.

Select a date range in the options panel then click *Apply options*.

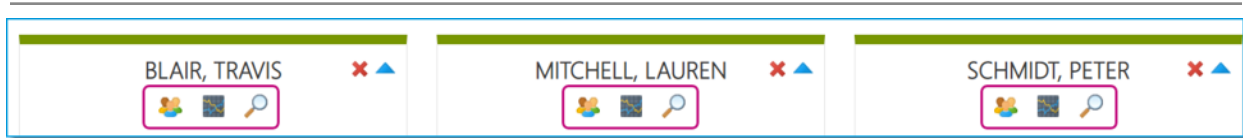
1. Select the first item for the comparison: In *Options Selection*, select a scope type (Enterprise Model, Supervisor Group, or Custom User Group).
2. Select the item to compare in the *Scope Selection* drop-down menu.
3. Click *Fetch*.
4. Return to the *Options Selection* section and use the same steps to select the next item to add to the comparison.
5. Repeat for up to 5 items.
6. After making all selections, click *Run Comparison*.

The dashboard shows each site/activity/supervisor/group, the overall adherence percentage, top and low performer, and includes graphs with links to expose details.

Click the blue arrow to toggle between the overall adherence hour stats and top/low performer.



Use the icons at the top of each item to view additional data.



Use the blue arrows ▼ ▲ to expand / collapse the sections for easier viewing. Click the red X to remove the item from the comparison.

The people icon will display on the bottom of the screen the people in that activity.

The graph icon will display a graph of the adherence for that activity over the time of the report. Click on the graph icon in multiple activities to add them to the display.

Click the magnifying glass icon to launch a new window with the adherence summary report for that activity.

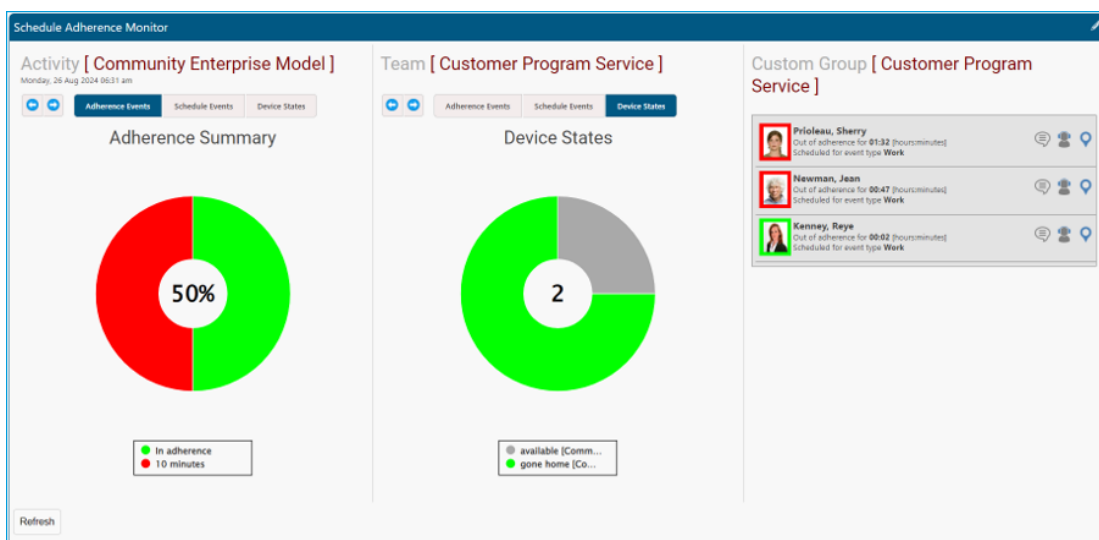
When viewing the list of participants, click the *Include* checkbox in the table to add that person to the graph. Uncheck to remove them from the graph.

For each selected activity, view the top performer and low performer and their respective adherence percentage. The percentage next to their score reflects the difference from the mean.

As with most charts and tables, there is the option to export the data by clicking the hamburger menu above the graph/table.

Schedule adherence monitor

Add the Schedule Adherence Monitor to your home page to view the current adherence status for an activity, a supervisor team, or custom group.





Click the pencil icon in the upper right of the module to change the group or view.

Alerts are customizable so only certain violations, such as being out of adherence for an extended period, will cause an alert to occur.

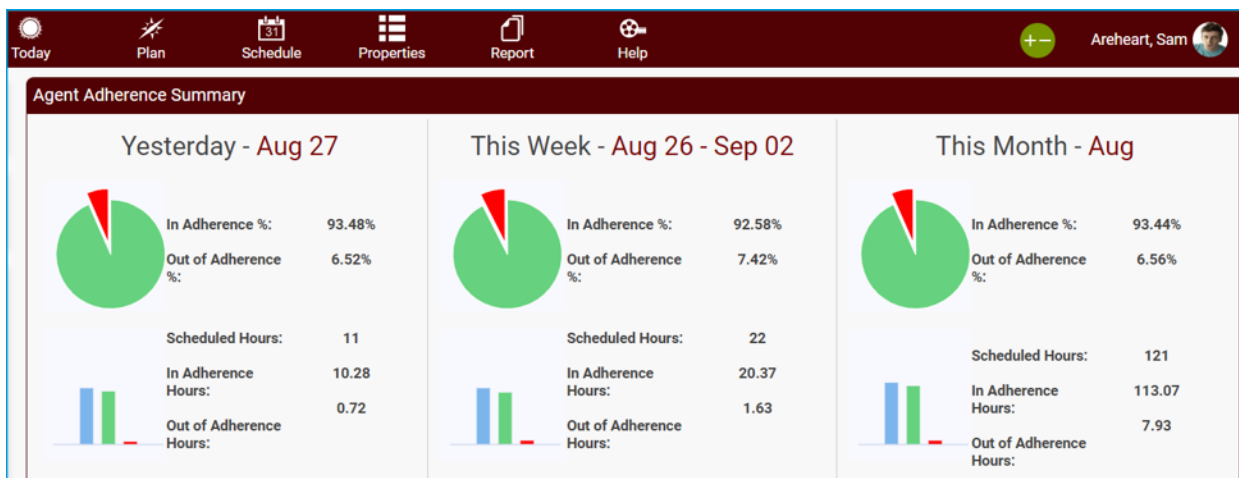
Configure schedule adherence monitor
Configure your individual preferences for the schedule adherence monitor. This component allows you to see three different views of your adherence alerts data, and you can configure those individual views using the controls below.

Left	Center	Right
Configure the left-side component. Show this element in the monitor control? ☐ Yes Header text Activity Include participant type name in header? ☐ Yes Participant list type Select an activity from the enterprise model Selected activity Site 1 - Dallas, TX Selected data source -- Default -- Selected adherence threshold -- Default -- Display control Display the data in a pie chart. Save	Configure the center component. Show this element in the monitor control? ☐ Yes Header text Team Include participant type name in header? ☐ Yes Participant list type Select an activity from the enterprise model Selected activity Customer Program Service Selected data source -- Default -- Selected adherence threshold -- Default -- Display control Display the data in a pie chart.	Configure the right-side component. Show this element in the monitor control? ☐ Yes Header text Custom Group Include participant type name in header? ☐ Yes Participant list type Use the data source from [Center] Display control Display the data as rows in a list.

Agent View

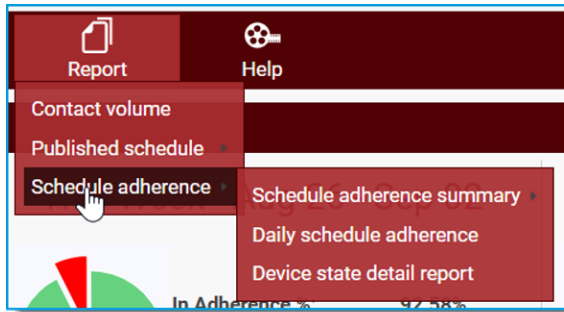
Agents can view their own adherence data by running an adherence report or by adding the Agent Adherence Summary module to their home page.

The module shows adherence details for yesterday, the week, and the month.





Agents have three report options: Schedule adherence summary, Daily schedule adherence, and Device state detail report.

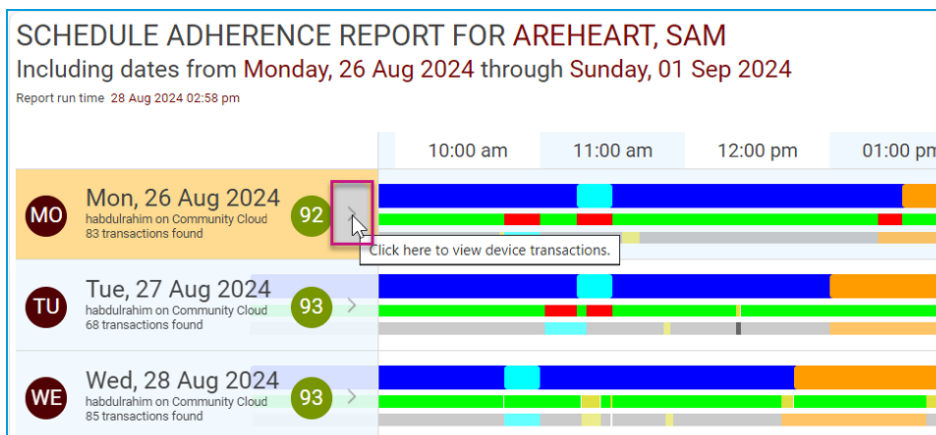


Schedule adherence summary

This is the same as the administrator's view with the options as filters but is just for this agent.

Daily schedule adherence

This is similar to the administrator view.



Viewing state transactions for any day is available when running this report by clicking on the greater than symbol > next to the adherence score.

Device state detail report

This report includes the device transactions for **today** only. To view a different day, use the daily schedule adherence report.



FAQs

How long does CommunityWFM | AI WFM store adherence data?

Adherence phone states are only kept for a certain amount of time. In most cases, the default setting is to retain the phone states for a **rolling 90-day** timeframe. This means that during the overnight hours the system will remove any phone states that are older than 90 days.

Administrators may change this setting in Settings > Application settings > Administrative settings > Data retention policy. However, longer retention may lead to system issues.

Agent state transaction **summary** data, which is processed automatically at regular intervals, may be retained indefinitely.

Why does the adherence line on an agent's schedule look like a colorful barcode?

If you right click on the Agent's schedule and choose *Show layered schedule view*, you will find that there are two events occurring while having the same priority setting (circled number) but with different InQueue/OutOfQueue settings. The tell-tale sign is the adherence line looking like a UPC or barcode. The system is arguing with itself on how to properly report the adherence due to these two events having the same priority setting. Once the priority is adjusted on one of the events, the numbers will make sense.

Can I modify the adherence phone states?

CommunityWFM | AI WFM users with the role of Administrator can modify the phone states used for adherence coming from the ACD. To do this, navigate to Settings > Data Sources.

In this window, click on the Data Source to change. Most centers only have one option.

In the Setup options tile, click *Show the setup options* dialog.

From the options, click *Device States*.

Click the name of the event you wish to modify.

In the pop-up window, you can edit not only the name of the phone state, but also whether CommunityWFM | AI WFM will consider the state to be 'In Queue' or 'Out of Queue', as well as changing the color of the event in the 'Agent State Transaction' line (3rd Rail).



Why doesn't adherence = 100% when an agent's adherence line is green all day?

What you're seeing is the result of thresholds. The threshold may be set to filter out transactions that are generally too small to merit the time to correct (e.g., 1–3 minutes), but these still count towards the agents final score and can add up over the day, which is why an agent might not be at 100% even though their adherence line is green all day.

You generally don't want to coach to or expect a 100% adherence as it's not realistic for a call center environment. To reach 100% adherence you would need to be exactly on time for all events and never go out of queue.

To view state transactions for an agent, click the magnifying glass and you can see every interaction and what made them not reach 100%.

Is there a report to see 'unaccounted for' time?

Specifically, time that is not included in scheduled event types.

The *Historical Actual Paid Time Report* (Report > Schedule adherence > Daily Paid Time > Enterprise Model) will show Scheduled Paid, Actual Paid, Schedule Unpaid, and Actual Unpaid time.

Why is there a discrepancy between the schedule adherence and historical schedule adherence reports?

The historical adherence report is not accurate for real time analysis, whereas the daily adherence report offers a more detailed view of the agent's current states and real time performance. The historical report generally updates overnight.

Why is there a discrepancy between the schedule adherence history and the schedule adherence summary reports?

We recommend using the summary report as this is what the agents will see. When summarizing, the system performs rounding in the calculations, which results in slight differences between the totals seen in the two reports.