



Essentials Process Guide for Forecasting & Scheduling

For Community Software Version 5.x+
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About This Document

This document assumes that setup has been fully completed and you are ready to use Essentials. To review setting up Essentials, visit the Essentials Setup Guide.


The progression of this section follows the daily processes you will follow to complete your WFM activities.

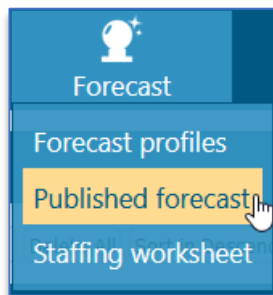
Getting Started

Welcome to **Essentials!** You have successfully logged in.

Forecasting

Processing a forecast in Essentials is quick! Essentials will look through your company's history of contact volume and average handle time (AHT), using the forecast profiles established during setup to determine which weeks to use.

 This section assumes that you have a valid forecast profile set to 'Default.'



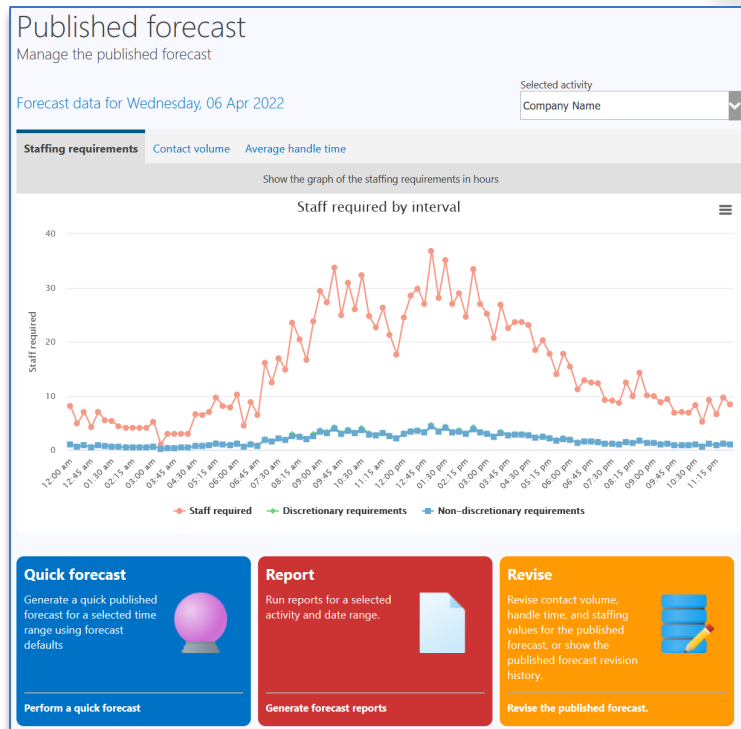
To get started, go to the **Forecast** tab and select **Published forecast**.

The published forecast represents the official forecast for the organization. All forecast reports, including intraday, will compare actual collected Contacts and AHT to the forecast you have generated.



By default, the published forecast displays today's forecast. If you have not generated a forecast for the current date, it will be blank.

Once generated you can click tabs at the top to view reports for **Staffing Requirements** (hours), **Contact Volume**, or **Average Handle Time**.



Quick Forecast

To create a forecast for a new date range, click **Perform a quick forecast** link in the blue tile. In the pop-up, enter a date range then click **Generate** to create a quick published forecast for a selected date range using forecast defaults. When complete, click **Dismiss** to view the new forecast.

The quick forecast will run for the selected date range using your default forecast profile created during the setup process.








Revise Published Forecasts

Revision options include by Interval, Daily, Weekly and Monthly totals for contact volume, handle time, and staffing values for your published forecast. Additionally, Essentials will track each forecast revision in a revision history.

Revision options

Select from the following options to revise the published forecast

- 
Revise specific intervals
 Revise forecasted contact volume, handle time or staffing requirements for each interval of a selected date.
- 
1 **Revise daily totals**
 Revise the daily total forecasted contact volume, handle time or staffing requirements for a range of dates.
- 
7 **Revise weekly totals**
 Revise the weekly total forecasted contact volume, handle time or staffing requirements for a range of dates.
- 
31 **Revise monthly totals**
 Revise the monthly total forecasted contact volume, handle time or staffing requirements for a range of dates.
- 
Show revision history
 Show the published forecast revision history report and optionally delete unwanted forecast revisions.

Revise specific intervals.

1. Choose an *Activity*.
2. Enter the date you wish to modify.
3. Enter a required Comment about the revision then click *Next*.
4. Make the adjustments for each interval then *Save*.

1 2 3

Revise published forecast

Step 1: Specify revision parameters

Selected activity

Select the date to revise

Time zone

Comments

1 2 3

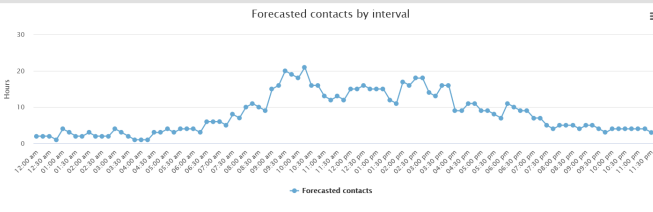
Revise published forecast

Step 2: Revise forecast data

Contact volume Average handle time Staffing requirements

Show the graph of the contact volume

Forecasted contacts by interval



Time Interval	Contacts	Adjustment	Adjustment type	Adjusted	AHT	Adjustment	Adjustment type	Adjusted	Staff	Adjustment	Adjustment type
12:00 am	2	<input type="text"/>	Value adjustment	N/A	700	<input type="text"/>	Value adjustment	N/A	4.06	<input type="text"/>	Value adjustment
12:15 am	2	<input type="text"/>	Value adjustment	N/A	620	<input type="text"/>	Value adjustment	N/A	3.88	<input type="text"/>	Value adjustment
12:30 am	2	<input type="text"/>	Value adjustment	N/A	495	<input type="text"/>	Value adjustment	N/A	3.6	<input type="text"/>	Value adjustment
12:45 am	1	<input type="text"/>	Value adjustment	N/A	458	<input type="text"/>	Value adjustment	N/A	2.01	<input type="text"/>	Value adjustment
01:00 am	4	<input type="text"/>	Value adjustment	N/A	331	<input type="text"/>	Value adjustment	N/A	3.9699999999999998	<input type="text"/>	Value adjustment

Follow the same process to revise daily, weekly, or monthly contact volume/AHT.



Creating a Schedule

Now that you have created a forecast you can create a schedule for the forecasted week. When you click the **Schedule** tab, you will be able to create a working schedule then publish it to your agents.


This section assumes that your agents are properly configured, and a schedule templates in place.

Schedule

Create and maintain your agent's working schedules, and publish golden schedules to the agents included in the schedule.

Working schedules


Create working or what-if schedules optimized for your staffing requirements and people.



[Set up Working Schedules.](#)

Published schedule

Review and revise the official, published schedule. Also make intraday changes using ASAP.



[Go to the Published Schedule.](#)

Click *Set up Working Schedules* then *Click here to create new working schedules*.

1. Choose the activity level.
2. Enter a name (*description optional*).
3. Leave the box checked to automatically include a reference to this week's published forecast.
4. Click *Next*.
5. Click *Next* again.

New schedules

Step 1: Enter basic schedule properties

Apply to the selected activity

Claims ▼

Name

Week of 04 April 2022

Description

Automatically include a reference to this week's published forecast

[Next >](#)



Select the week(s) for the working schedule by clicking on any day in the week. The dates populate in the table below. Click *Next*.

New schedules

Step 2: Select one or more schedule weeks
Click on a date in the calendar to create a working schedule for that week

← April 2022 - June 2022 →

April 2022							May 2022							June 2022						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30	1	23	24	25	26	27	28	29	27	28	29	30	1	2	3
							30	31	1	2	3	4	5							

Valid?	Number	Week From	Week Thru
<input checked="" type="checkbox"/>	1	Monday, 04 April 2022	Sunday, 10 April 2022

Click on either date link to open the working schedule worksheet with the Steps to Success.

New schedules

Step 3: Review new schedules
Click on any of the links below to show the schedule worksheet

Valid?	Reference Number	From Date	Through Date
<input checked="" type="checkbox"/>	289	Monday, 04 April 2022	Sunday, 10 April 2022



If needed, you can customize the Custom Work habits & hours for an activity, review any pending events or exception requests, or select a different forecast to use when generating the schedule.

SCHEDULE START
Monday, 04 Apr 2022
SCHEDULE END
Monday, 11 Apr 2022
PARTICIPANTS
0

Schedule metrics overview
Last updated

This working schedule doesn't have any schedule metrics calculated. You can either generate the working schedule, or press the "Recalculate metrics" button below.

Recalculate metrics
Delete this schedule

Working Schedule Steps to Success

Basic properties

Set the basic properties of this working schedule.

Set up basic properties.

Custom work habits & hours

Customize the work habits and hours for this working schedule for specific work patterns this week.

Set up custom work habits.

Review events & exceptions

This is your final opportunity to review any pending time off requests before you generate an optimized schedule.

Review events & exceptions.

Select forecast data

Connect this schedule to one or more forecasts before you generate an optimized schedule.

Select forecast data.

Generate optimized schedules

Validate your settings and create an optimized schedule based on your people and forecast data.

Generate optimized schedules.

Click *Generate optimized schedules*. The system will verify the settings.

Verify settings before scheduling

Status	Conflict Name	Status Message
✓	Work Habits & Hours Verification	Work habits and hours exist for all activities included in this schedule.
✓	Agent Assignment	All agents are assigned to activities
✓	Agent Schedule Template Assignment	Sufficient valid schedule template assignments are present to generate an optimized schedule
✓	Current Schedule Running Verification	No schedule job or agent requirements forecast job is currently running.

Generate Schedule
Re-Verify Schedule



When all checks are green, click *Generate Schedule* to create work shifts for all agents in the site. Select the level of schedule bias (minimizing staffing cost vs maximizing coverage) then click *Go*. This process may take a few minutes.

Configure schedule task properties
week of 17 April 2022

Where should the staffing data come from?
Published Forecast ▾

How would you like to set your schedule bias?

Minimize staffing cost Maximize coverage

10

Go

When finished, close the pop-up window.

Success

Processing schedule task

Current schedule metrics

62.52% Schedule fit

Schedule efficiency	99.33
Required hours	2200.74
Scheduled hours	1580.25
Staff hours	1394.50
Off-phone hours	185.75
Shortage hours	815.56
Surplus hours	9.32

Last updated Thursday, 07 April 2022 10:30 am

Click *Manage agent schedules* in the left side navigation pane and select desired report options to review the schedules. Click *Apply options* to view the agents in the activity and their schedule for the week including break sets.

WORKING SCHEDULE REPORT FOR		Event type legend ▾		Monday, 18 Apr 2022 ▾																																									
<small>Including people from Activity Claims</small>																																													
<small>Report run time: 07 Apr 2022 11:34 am</small>																																													
Staff required	1	4	4	3	1	4	4	6	5	4	5	7	7	8	7	11	9	11	10	14	10	15	13	16	15	22	21	19	18	23	19	22	25	23	21	16	19	15	17	17					
Staff in queue	1	2	2	2	1	3	3	7	9	11	11	13	12	14	14	17	13	18	18	19	15	25	24	22	17	25	26	21	20	22	28	25	26	29	29	28	24	26	29	21	22	23			
Staff variance	0	-2	-2	-1	0	-1	-1	1	4	7	6	6	5	6	7	6	4	7	8	5	5	10	11	6	2	3	5	2	2	4	5	6	4	4	6	7	8	10	10	6	5	6			
Projected service metric	81	79	76	80	87	94	84	98	99	100	100	99	99	99	100	99	99	99	100	99	99	99	100	99	96	97	99	96	97	98	99	99	98	98	99	99	99	99	99	99	99	99	99		
		05:00 am		06:00 am		07:00 am		08:00 am		09:00 am		10:00 am		11:00 am		12:00 pm		01:00 pm		02:00 pm																									
Lewis, Lisha <small>10 Sep 2018</small>	[Schedule bar with blue, red, and orange segments]																																												
Cassleman, Sherry <small>13 Mar 2017</small>	[Schedule bar with blue, red, and orange segments]																																												
Guzman, Denise <small>08 Jun 2018</small>	[Schedule bar with blue, red, and orange segments]																																												
Nelson, Candice <small>09 Feb 2017</small>	[Schedule bar with blue, red, and orange segments]																																												
Olsen, Kristin <small>14 Mar 2016</small>	[Schedule bar with blue, red, and orange segments]																																												

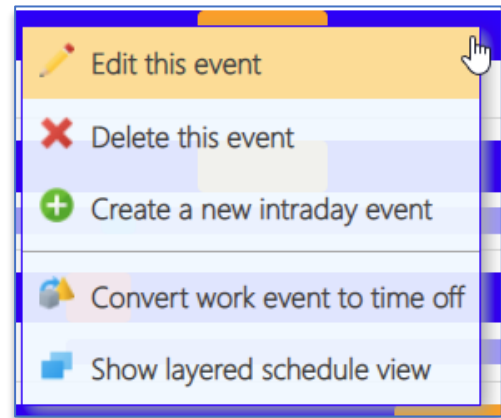


Modifying Working Schedules

You can easily manipulate agent schedules by clicking and holding a work event or off-phone event, then drag and drop it to the desired timeframe. You can make changes before or after publishing, however, it's best practice to make edits prior to publishing.

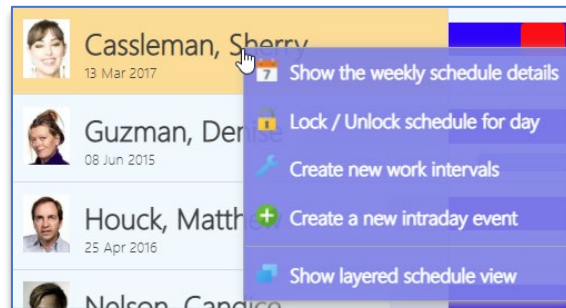
Right clicking the schedule event name will give other edit options including—

- Edit the event
- Delete the event
- Create a new intraday event
- Convert work event to time off (for work events)
- Show Layered Schedule View



Right clicking on an agent's name will give the option to

- Show the weekly schedule details
- Lock/Unlock schedule for day
- Create new work intervals
- Create a new intraday event
- Show layered schedule view





For example, selecting *Create a new intraday event* will take you to a screen where you choose the *Request Type*, *Start Date*, *Start* and *End Times*, and select whether to modify existing work hours. You can also apply a recurrence pattern if the event will occur on more than one day in the schedule.

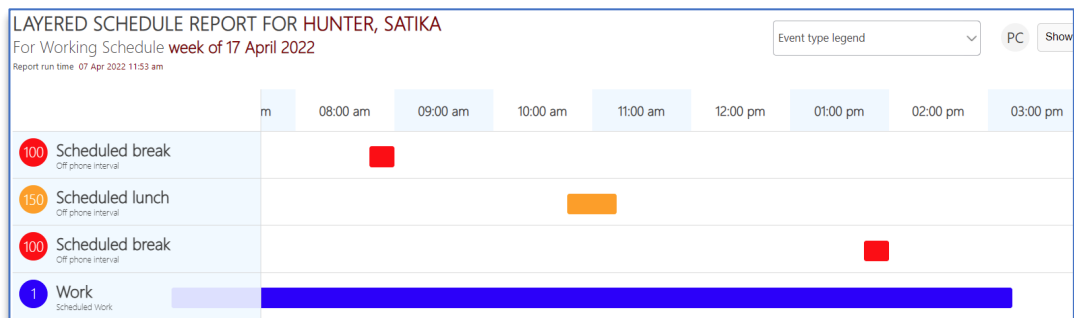
Add a required comment.

If finished, click *Save*. If you would like to apply the event to additional agents, click *Next*.

Click *OK* in the pop-up to confirm that you want to make the change.

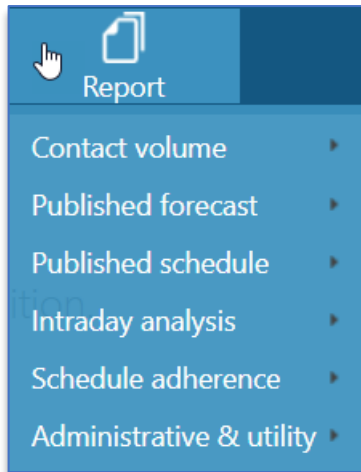
Click *Finish* and the new event will be on the schedule.

A layered schedule view allows seeing the events on separate lines. You can edit the same ways as in the published schedule view.





Reporting and Intraday Management



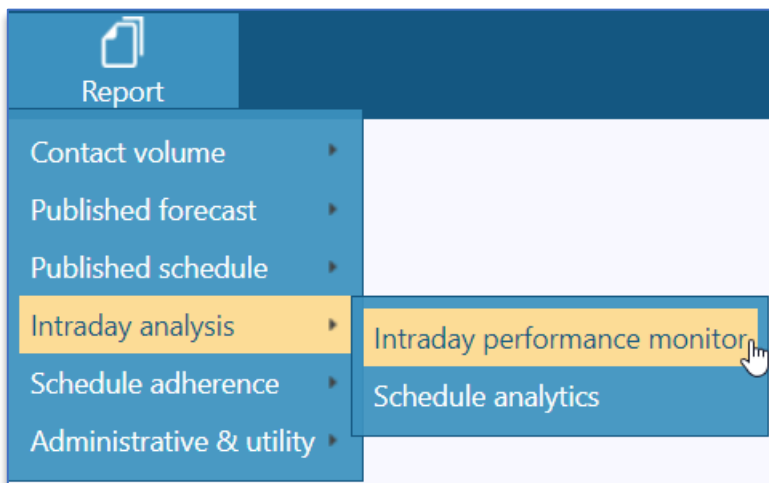
The Report tab includes most Essentials reports including:

- Review historical Contact Volume
- Review Published Forecasts
- Review Published Schedule for summary and analysis data
- Generate Intraday Analysis reports
- Generate real-time or historical Schedule Adherence reports

We recommend that you monitor intraday analysis and schedule adherence reports continuously every day.

Intraday Analysis

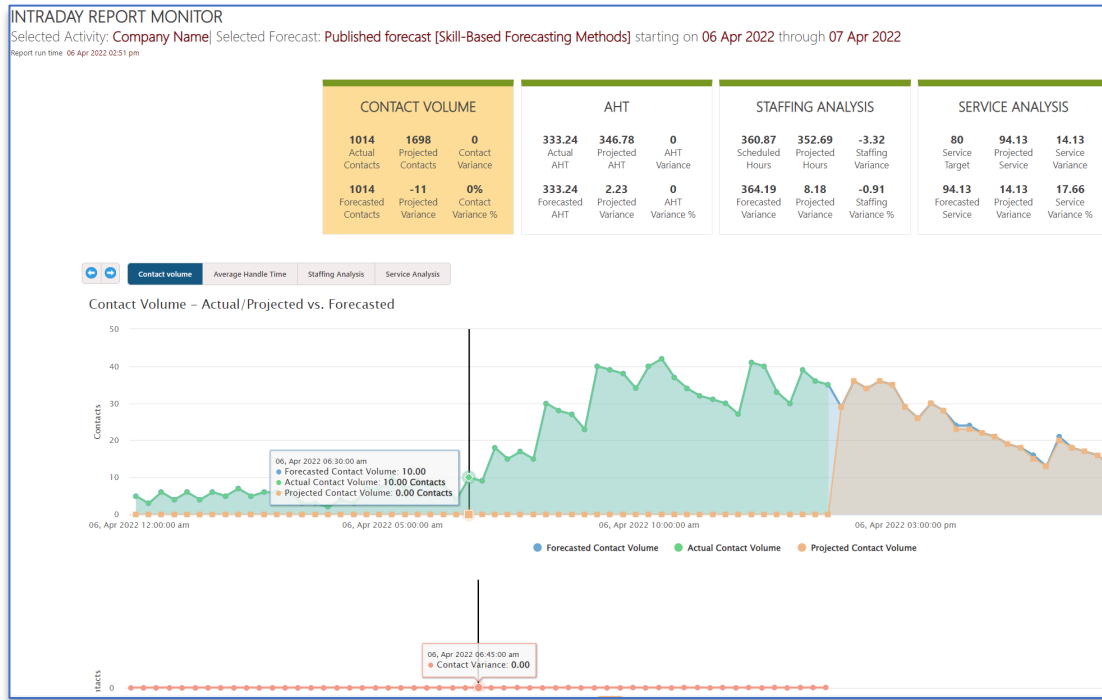
Go to Report > Intraday analysis > Intraday performance monitor.



The Intraday Performance Monitor will compare Actuals vs Forecasted for Contact Volumes, AHT, Staffing analysis, service analysis, up to the most recent interval (15 min). It will also reforecast the remainder of the day for all datasets, allowing Community to project revised staffing needs throughout the day.



These interactive reports have tabs to select different sets of data.



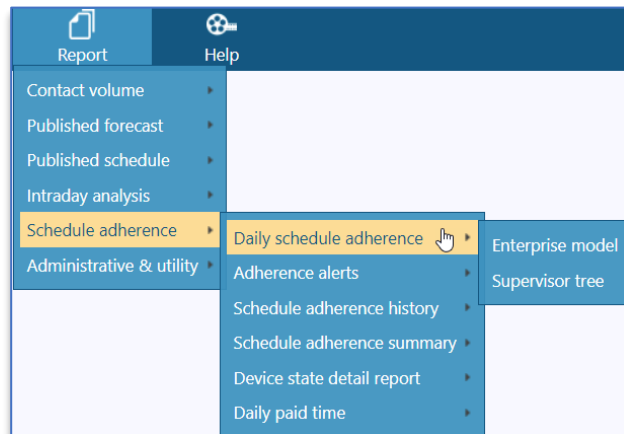
Schedule Adherence

Are your agents adhering to their schedules? The Schedule Adherence report can show you.

The schedule adherence menu includes the daily schedule adherence for the current day, up to the minute real-time adherence alerts, and historical adherence, available at the enterprise model level or by supervisor.

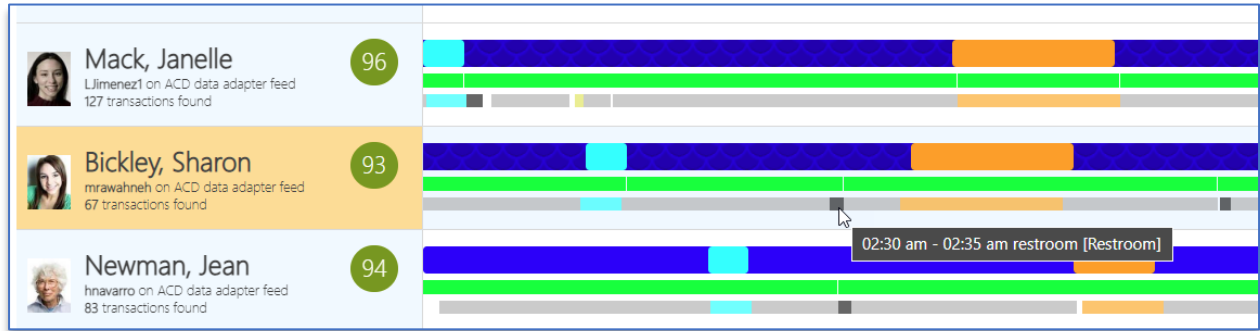
Daily schedule adherence

Go to Report > Schedule adherence > Daily schedule adherence > Enterprise model (or supervisor tree)






Daily schedule adherence shows each agent's adherence for today (in a color-coded circle) and the third line on the schedule shows adherence details for the day. Hover over an event to view the details.



Clicking on an agent's name allows viewing additional adherence details for the schedule.



Mack, Janelle

Assigned to supervisor **Mitchell, Lauren**

82.50 hours costing **\$1162.5**


04 Apr 2022 through 10 Apr 2022


Scheduled for selected date


Paid summary		Queue summary		At work summary	
Paid	77.50	In queue	15.00	At work	82.50
Unpaid	5.00	Out of queue	3.00	Not at work	0.00


Adherence for reported date range


In queue adherence		Out of queue adherence		Total adherence	
Scheduled	15.00	Scheduled	3.00	Scheduled	18.00
Actual	14.30	Actual	2.90	Actual	17.20
Variance %	95.33	Variance %	96.67	Variance %	95.56


Transactions


Daily


Profile


Adherence


Time off