



Feature Guide

Agent Portal 5.x

For CommunityWFM Software Version 5.x+
Version July 30, 2024



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About this document

This document is a review of the features in the agent portal, including features new in 5.x.

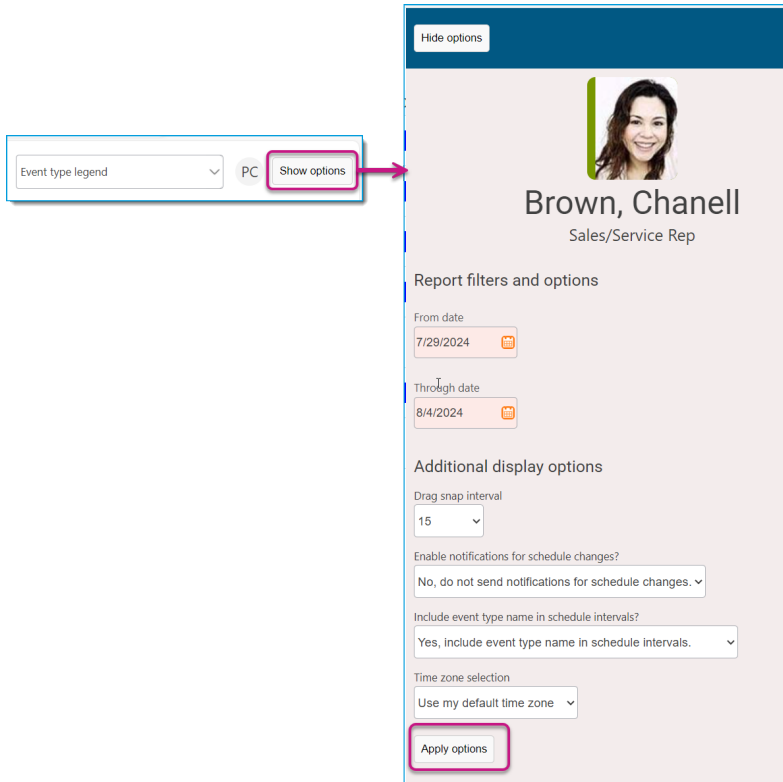
Introduction

CommunityWFM 5.x has employee empowerment at the forefront of its design. The agent portal is based around the concept of a user-friendly design and easy navigation, along with quick access to several communication channels so employees and supervisors can stay connected.

Navigation tips

Show / Hide options

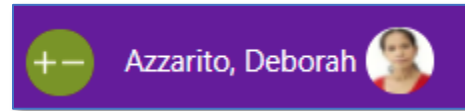
On some pages there is a *Show options* button on the top right side of the page. Clicking the button launches a fly-out menu to make additional selections, such as selecting dates and parameters for a report. Click *Apply options* at the bottom to complete the action and close the panel



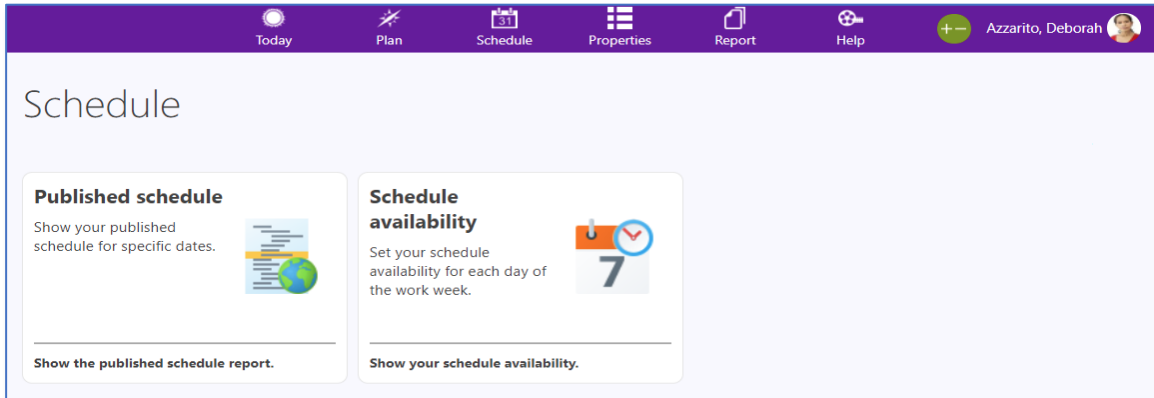


Expand / Collapse Tiles

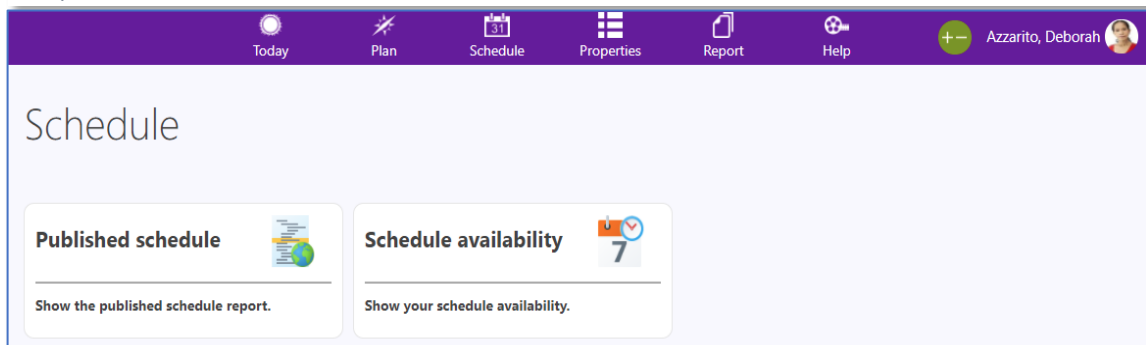
Next to your name is a green +/- button. Click this to expand or collapse the tiles on the page. Once selected, the settings will hold for all pages until you click the +/- button again.



Expanded

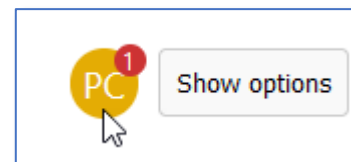
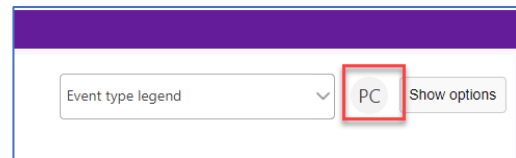


Collapsed



Pending changes

At the top of some pages or modules you may see a small circle with PC. If the icon turns orange and has a red number, this means there is a pending change for the page. The red number indicates the number of pending changes. Click the PC button to rerun the report or refresh the page to see the changes.





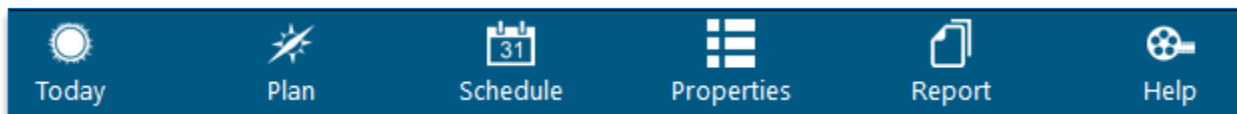
Left side navigation pane open and close.

Click this icon to open or close the left side navigation pane.



Application Menu Overview

You'll find six application menu items at the top of your home page: Today, Plan, Schedule, Properties, Report, and Help. **Note:** You may not see all menu items or may see additional menu items, depending on the selections made by your administrators.



Each menu item has multiple parts and modules that make creating, communicating, and planning around your schedule a simple process. Selecting a top-level menu item will open a new window with links to the sub-menu options.

Today takes you to your home page, which displays information relevant to your current day (while also providing the ability to view certain aspects of past or future days). This includes your personal information, shift schedules, memos, surveys, and other important links. This is the primary hub for the agent portal.

Use **Plan** to plan for the future, schedule your work around important events, and to review previously scheduled requests by date in a concise summary report. There is added flexibility, tracking of accrued time, and ways to request time off, including bidding for vacation time and reviewing existing time off rules before making your request (depending on the structure set up by your company).



Schedule allows you to view multiple aspects of your schedule, make requests, establish preferences, and check in for your shift.

Visit **Properties** to review your profile (including Employee ID and supervisor name), update your password, select a profile picture, update your notification preferences, and set up the mobile app (if enabled).

Report allows you to create, view, and print reports for your current schedule and view statistics on your schedule adherence.

Help is filled with useful videos that explain sections of the agent portal.

Today

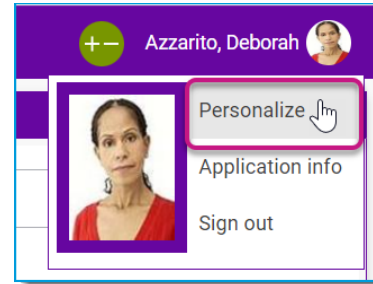
Today is the primary hub of the agent portal. You can create personal preferences to control and arrange what you see on the Today page.

The screenshot displays the 'Today' page interface. On the left, there are several widgets: 'Today's Hot News' with a weather policy update, 'All About Me' for Deborah Azzarito (Sales/Service Rep) with contact info and attendance history, 'Today's Links' for Google and Paid Time Report, 'Today's Survey & Results' with a poll about communication preferences, and 'Schedule Transactions' with a list of trade requests. The main area features a 'Weekly Schedule' report for 'AZZARITO, DEBORAH' from Sunday, 28 Jul 2024 to Saturday, 03 Aug 2024. The schedule shows work hours with 'Work' blocks and 'Lunch' breaks. At the bottom, a 'Memos' section shows an incoming message from 'Account, Service' dated 7/29/2024 7:55:21 AM with the subject 'Publish Schedule Notification'.

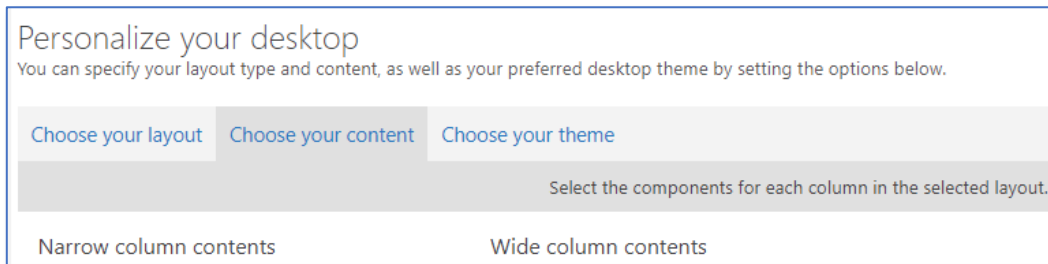


Personalizing Modules

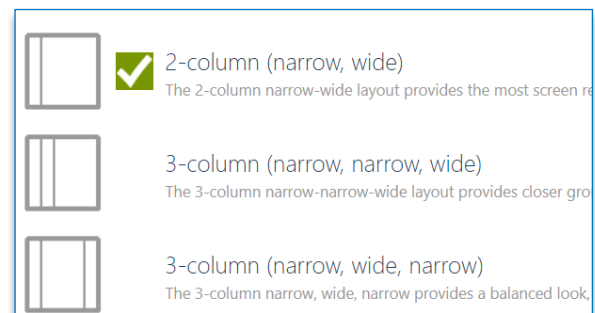
The first step when using Today is choosing what content modules are important for daily use. In the top right corner of the portal hover over your name and click *Personalize*.



Personalize offers three areas to customize your options: *Choose your layout*, *Choose your content*, and *Choose your theme*.

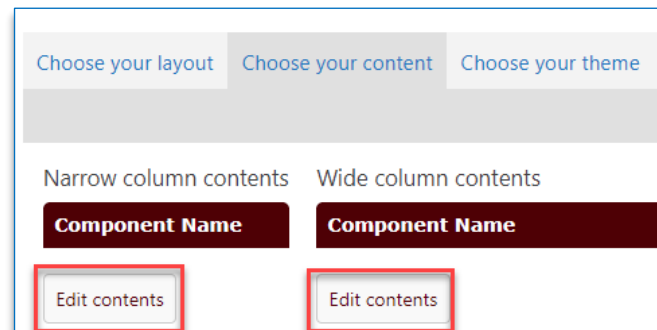


Choose your layout allows you to select from three choices for the home screen layout.



Choose your content allows you to edit the contents of each column.

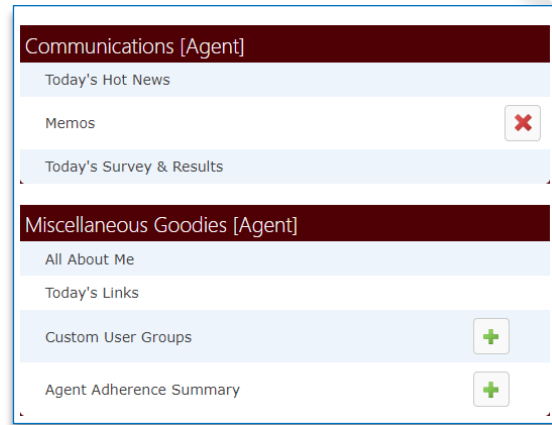
To add components to your home page, select *Edit contents* under the column that you wish to change.





In the edit contents page, available modules will have a green plus sign + (add) or a red X (remove) next to the title. Clicking the green plus sign will add the module to the specified column, while the red X will remove it.

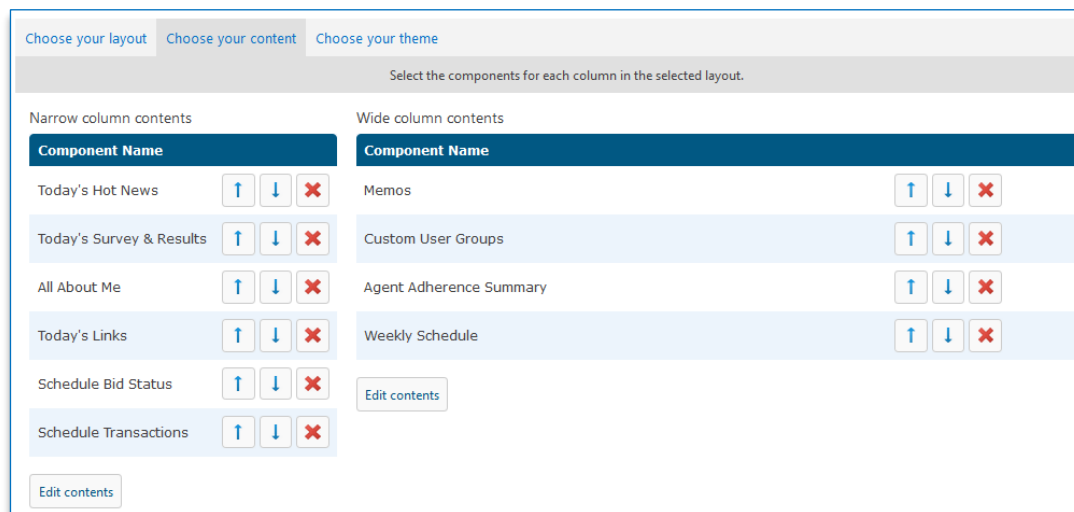
The order in which you click the modules here is the order they will appear on your homepage (though you can adjust the placement in the *Choose your content* window).



Note: some modules must be in certain columns due to their size, and modules without an X or + are not available for this column.

After selecting your components, close the browser window and refresh the *Choose your layout* window.

Select the *Choose your content* tab. Use the up and down arrows to adjust the location of each component on your Home page, or click the red X to remove it.



Choose your theme allows for customization of the color scheme. Choose a preset theme to see how it affects the look of modules in the portal then click *Save* when you find the one you like.



Purple theme:

Choose your layout | Choose your content | **Choose your theme**

Select the color and background for the application home page.

Desktop theme

Purple

Narrow Content	Wide Content using "Purple"
Narrow Components	Wide Components occupy the remaining available width.

Today Module Summary

Narrow Column

Communications

Today's Hot News

Today's Hot News is a scrolling message bar used for important daily information. This can range from a meeting reminder to important company news. Hover your cursor in the middle of the message to stop the scroll and read it.

Today's Hot News

Fire Drill Expected at 2 PM

Today's Survey & Results

The *Today's Survey & Results* module is used to gauge input from employees about important topics defined by the survey's administrator.

Today's Survey & Results

What method of communication would you like to receive notifications?
Results [3]

Email	[33%]
SMS Text	[0%]
Mobile App	[67%]
Desktop pop-up	[0%]

Miscellaneous Goodies




All About Me

All About Me contains your picture and personal information including your name, email, hire date, assigned role, login time, and a link to run a report of your attendance history.

All About Me

McBride, Natasha



Title: Sales/Service Rep

Email Address: natasha.mcbride@wfmsg.com

Hire Date: 18 Jul 2005

Assigned Role: Agent

Login Time: 11:39 AM

[Show your attendance history](#)

If using the mobile app, you can upload a selfie to use as your profile picture (after supervisor approval).

Today's Links

Today's Links is a place to add useful links granting quick access to pages on the agent portal or useful external resources. You may or may not be able to edit the links, depending on the settings for your company.

Today's Links

- [● Analyzing History for Forecasting](#)
- [● Creating a Forecast Profile](#)
- [● Creating a Working_Forecast](#)
- [● Editing a Working Forecast](#)
- [● Google](#)




Schedule Transactions

Schedule Transactions allows you to quickly view or request temporary shift swaps, add/subtract hours, or view the status of current transaction requests.

Schedule Transactions

View outstanding schedule transactions

New Schedule Transactions

-  I want to trade schedules with another agent.
-  I want to give some of my hours away.
-  I would like to work additional hours.

Current Schedule Transactions

Current Transaction Responses



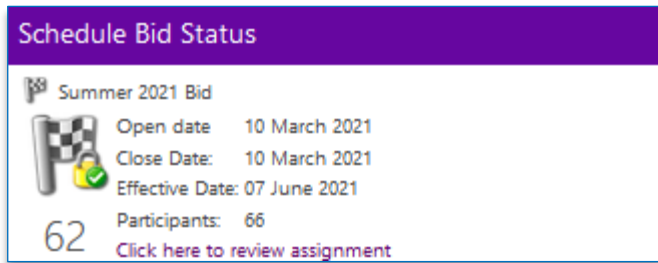
Schedule Bids

Schedule Bid Status allows you to view current schedule bids and their status. This may include important dates, time remaining, and a link to view more.

A schedule bid allows you to rank a predetermined schedule inventory by preference. You will be assigned a ranking based on predetermined variables (tenure with the company, performance, etc.) that determine your place within the schedule bid.

The *Schedule Bid Status* module on Today allows you to see all available schedule bids. The module contains several icons representing the status of the bid.

- Red (open lock) means it's available for preview and can be viewed but no selections can be made
- Red (closed lock) means the bid is closed and no longer available
- Green means the bid is currently open for participation

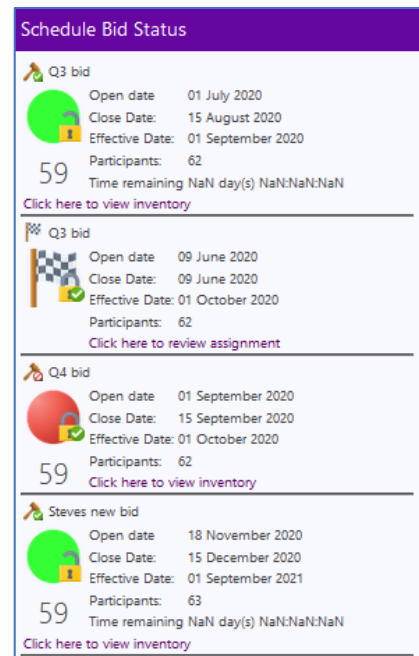


Schedule Bid Status

Summer 2021 Bid

Open date: 10 March 2021
 Close Date: 10 March 2021
 Effective Date: 07 June 2021
 Participants: 66

62 [Click here to review assignment](#)



Schedule Bid Status

Q3 bid

Open date: 01 July 2020
 Close Date: 15 August 2020
 Effective Date: 01 September 2020
 Participants: 62
 Time remaining: NaN day(s) NaN:NaN:NaN

59 [Click here to view inventory](#)

Q3 bid

Open date: 09 June 2020
 Close Date: 09 June 2020
 Effective Date: 01 October 2020
 Participants: 62

[Click here to review assignment](#)

Q4 bid

Open date: 01 September 2020
 Close Date: 15 September 2020
 Effective Date: 01 October 2020
 Participants: 62

59 [Click here to view inventory](#)

Steves new bid

Open date: 18 November 2020
 Close Date: 15 December 2020
 Effective Date: 01 September 2021
 Participants: 63
 Time remaining: NaN day(s) NaN:NaN:NaN

59 [Click here to view inventory](#)




Click here to view inventory/assignment opens the schedule bid page, where you can see your ranking compared to other participants in the bid with 1 being the top priority. You will also see a listing of all schedules available for bid. You can alternate between list view and tile view.

Bid rank

59 of 63

Commit this bid

Rescind commitment




Important dates


Bid open date: Wednesday, November 18 2020 12:00 AM

Bid close date: Tuesday, December 15 2020 12:00 AM

Bid effective date: Wednesday, September 01 2021 12:00 AM

Utilities


List view


Auto sort

The colors at the top of the tiles represent the probability of holding on to that specific schedule.

Green = High probability that they will hold the selected shift

Yellow = There is the possibility that they will NOT hold this selection

Orange = There is a high likelihood that they will NOT hold this selection

Red = There is a very low probability that they will receive the selection



The schedule bid contains multiple options for you to rank your shift preferences for that specific schedule bid. The move up and move down arrows will move the selected schedule up or down to your preferred place in the bid.

In the tile view you can view more options and set other preferences.

Click the *Show item details* button.

Weekday	Earliest Start	Latest End
Monday	10:30 AM	07:00 PM
Tuesday	10:30 AM	07:00 PM
Wednesday	10:30 AM	07:00 PM
Thursday	10:30 AM	07:00 PM
Friday	10:30 AM	07:00 PM
Saturday		
Sunday		

↑ Move Up ↓ Move Down

Show Item Details

Preference Score: 2.50

Activity Score: 100.00

Current Bid Score: 4.81

- "Like" this schedule to make it your first choice.
- "Dislike" this schedule to make it your last choice.
- Use the slider bar to assign a distinct placement to this schedule within the bid preferences.
- The bookmark option will mark the schedule for later review.

900 Bid 18 Item 38, Days: Mon; Tue; Wed; Thu; Sat; Shift Duration: 8.5 Hours

Item Scoring

Preference Score: 0.00

Activity Compatibility: 100.00

Bid Score: 3.66

Item Settings

Current Rank: 1 38 [13]

Opinion: None

Bookmark: No

Item Options

Like Move up

Dislike Move down

Bookmark



List view

Bid rank
59 of 62

Important dates
Bid open date: Wednesday, July 01 2020 12:00 AM
Bid close date: Saturday, August 15 2020 12:00 AM
Bid effective date: Tuesday, September 01 2020 12:00 AM

Utilities
Tile view Auto sort

Commit this bid Rescind commitment

Item ID	Monday	Tuesday	Wednesday	Thursday
869	05:00 AM - 01:30 PM	05:00 AM - 01:30 PM	05:00 AM - 01:30 PM	05:00 AM - 01:30 PM
871	10:00 AM - 06:30 PM	10:00 AM - 06:30 PM	10:00 AM - 06:30 PM	10:00 AM - 06:30 PM

Tile View

865	17	882	18	899	19	887	20	
Weekday	Earliest Start	Latest End	Weekday	Earliest Start	Latest End	Weekday	Earliest Start	Latest End
Monday	06:30 AM	03:00 PM	Monday	06:30 AM	03:00 PM	Monday	05:30 AM	02:00 PM
Tuesday	06:30 AM	03:00 PM	Tuesday	06:30 AM	03:00 PM	Tuesday	05:30 AM	02:00 PM
Wednesday	06:30 AM	03:00 PM	Wednesday	06:30 AM	03:00 PM	Wednesday	05:30 AM	02:00 PM
Thursday	06:30 AM	03:00 PM	Thursday	06:30 AM	03:00 PM	Thursday	05:30 AM	02:00 PM
Friday	06:30 AM	03:00 PM	Friday	06:30 AM	03:00 PM	Friday	05:30 AM	02:00 PM
Saturday			Saturday			Saturday		
Sunday			Sunday			Sunday		

↑ Move Up ↓ Move Down

Show Item Details

Preference Score:	Activity Score:	Current Bid Score:
0.50	100.00	82.53
0.50	100.00	14.04
0.81	100.00	2.57
1.25	100.00	7.72

Bid rank
40 of 87

Commit this bid Rescind commitment

Bid rank
40 of 87

Commit this bid Rescind commitment

Item Scoring shows how well the schedule matches up with your preference (preference score), and also your chance to get that schedule (activity compatibility and bid score).

Once you're satisfied with your choices, click *Commit this bid* to save your preferences. The lock icon will change from open to closed signifying your changes have been registered. If you wish



to make a change you can click *Rescind commitment* and the icon will change back to unlocked. You can modify then resubmit the bid as long as the bid is still open for selection.

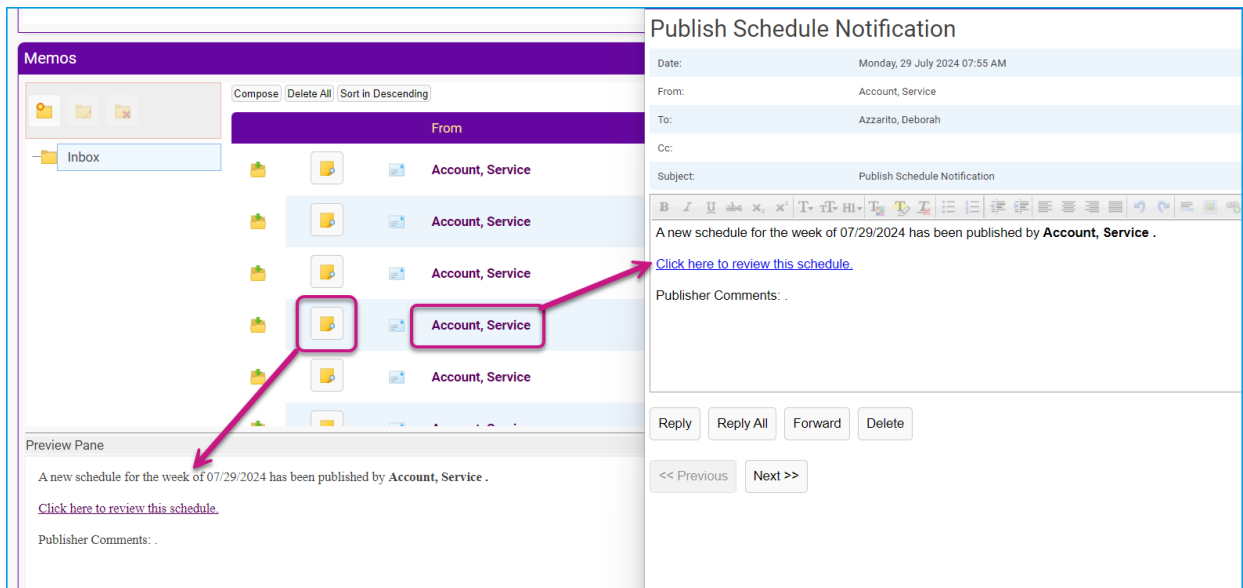
Once a bid is closed, no other selections can be made and your new schedule will be communicated to you based on your placement in the rankings and your selected preferences.

Wide Column

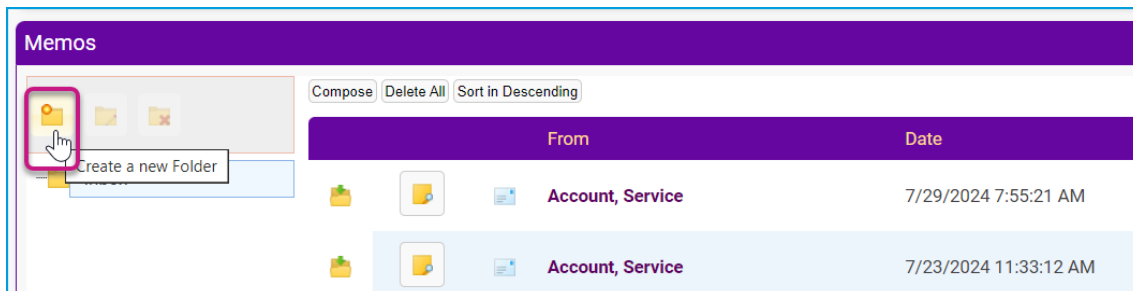
Memos

Memos is the main communication hub of the agent portal. It is where you can communicate with a supervisor or peer, and receive notifications of important schedule changes.

Click on the *From* hyperlink to open the message in a new window and reply, forward, or delete. Click on the preview icon to open the message in the preview pane.



You can create new folders to help organize your memos.





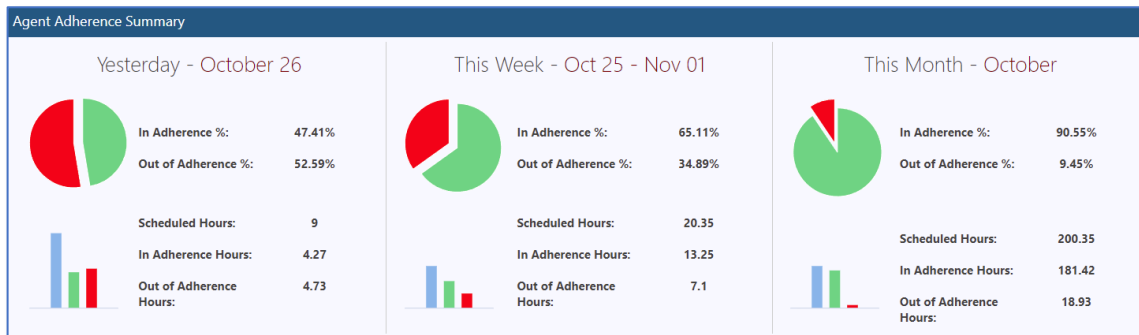
Custom User Groups

Custom User Groups includes groups created by your administrators to which you belong.

Group	Description	Icon
Softball Team	Summer league	

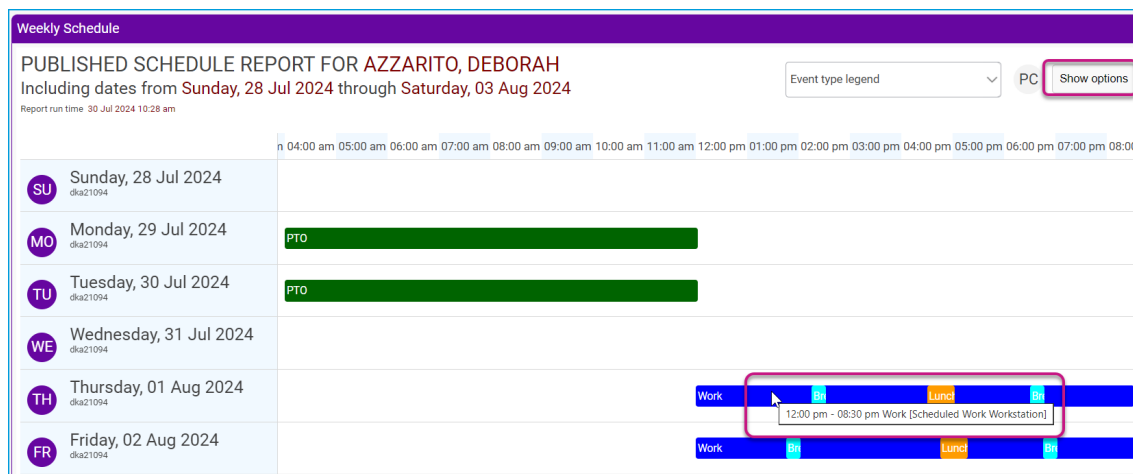
Agent Adherence Summary

View at a glance your adherence statistics for yesterday, weekly (this week's schedule), and monthly (first of month through today).



Weekly Schedule

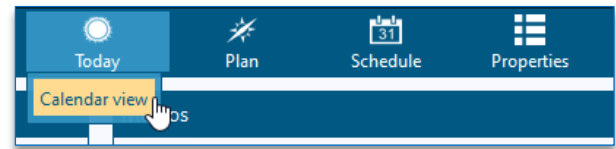
Weekly Schedule displays an easy-to-read layout of your schedule that can be adjusted by date. Click the *Event type legend* to view the color-coordinated key or hover over any section of the schedule bar for a pop-up tooltip. Click *Show options* to adjust dates to see a timeframe outside of the current week.



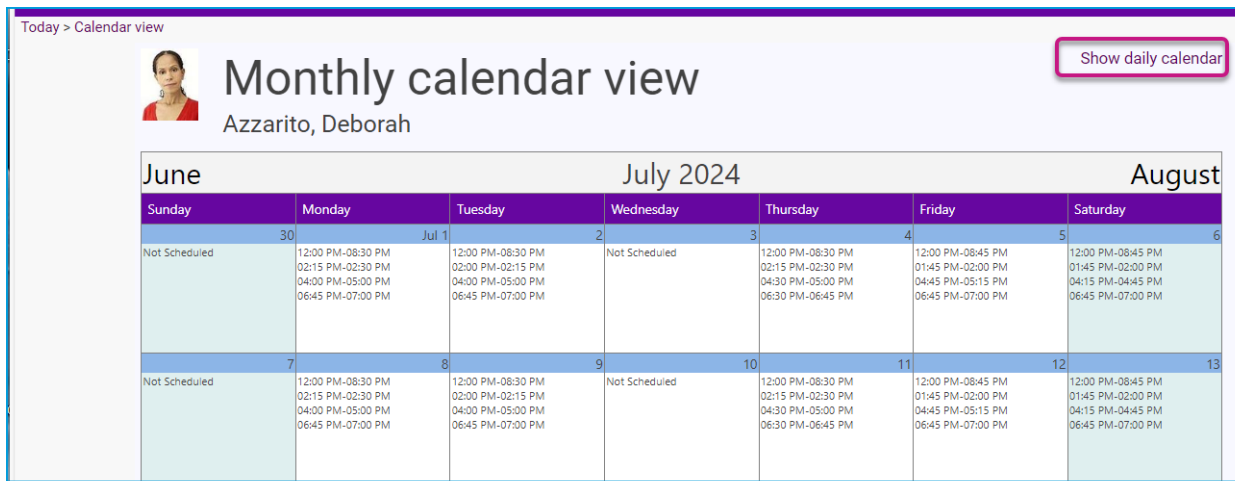


Calendar View

Access *Calendar view* by hovering over the Today menu item at the top of the screen. The calendar view allows more options to view your schedule. Switch between daily and monthly view by clicking the link in the top right-hand corner.

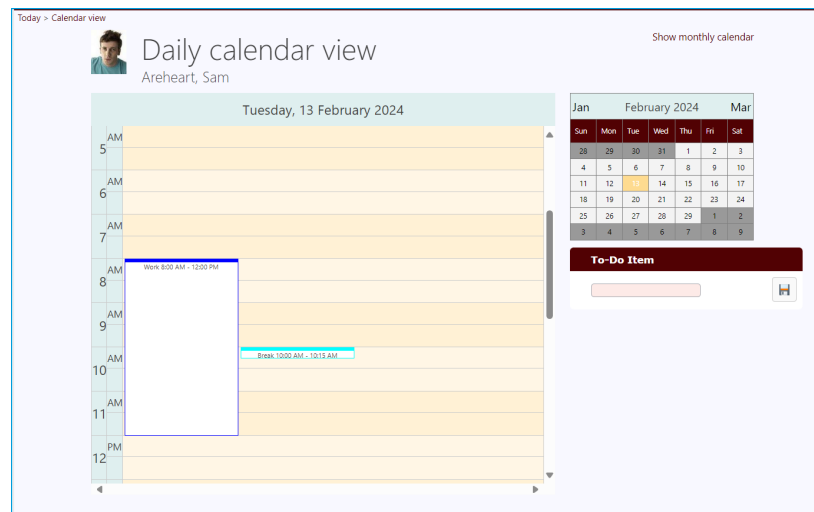


Monthly



Daily

While the monthly view of the calendar provides an overview of schedules, the daily schedule shows your specific events. The daily view uses color coded blocks to differentiate event types on the schedule.





Plan

Requesting time off has more options than ever before! For complete information and specific instructions, refer to "Time Off – A Guide for Agents."

Plan

Time off worksheet

Reivew your time off settings, upcoming PTO and PTO Calendar settings here.



Go to the PTO worksheet.

Time Off Requests

Request planned time off

Create new planned time off requests.



Add a time off event.

Request a recurring time off event

Create long term recurring events for family leave, military leave, etc.

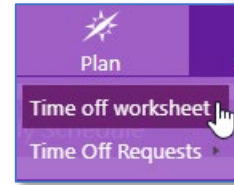


Add a long-term recurring event.



Time Off Worksheet






This is where you can review your time off accruals, time off settings, the policy to which you are assigned, and whether you are on a restricted activity plan.



Links on the left will take you to your list of upcoming time off, current and Calendar Partitions (if participating), and links to request planned time off or request a recurring time off event.

Plan > Time off worksheet

Time off worksheet options

-  Time off overview
-  Upcoming time off
-  Calendar Partitions
-  Request planned time off
-  Request a recurring time off event


Time off overview

ACTIVITY	CALENDAR START	CALENDAR END		TOTAL ACCRUED HOURS	SCHEDULED HOURS	ACCRUAL BALANCE	
Site 1 - Dallas, TX	01 Jan 2024	31 Dec 2024	FULL YEAR	224.00	-64.00	160.00	Show options
			YEAR TO DATE	224.00	-16.00	208.00	

Time off settings

General time off settings


Review your basic time off configuration.



[Review basic settings.](#)


PTO Policy

You are currently assigned the PTO policy named below.

Time Off 


Restricted action plan


You are not subject to a restricted action plan that affects time off requests.



PTO Classification Summary

This summary shows how each PTO Classification contributes to the total for the published accrual calendar.

PTO	Total accrued hours	Total scheduled hours	Total balance
	208.00	-64.00	144.00
	208.00	-16.00	192.00
	YTD accrued hours	YTD scheduled hours	YTD balance

SICK	Total accrued hours	Total scheduled hours	Total balance
	16.00	0.00	16.00
	16.00	0.00	16.00
	YTD accrued hours	YTD scheduled hours	YTD balance



Time Off Requests

Note: If you are part of a calendar partition, use the Time Off Worksheet to make requests.

Select **Request planned time off** for a one-time partial day event, a single full day, or multi-consecutive day events.


Select **Request a recurring time off event** for partial day events that occur on more than one day (consecutive or non-consecutive), or for full day events that occur on more than one non-consecutive day, including family leave, military leave, etc.

Time Off Requests

Create new time off requests for vacation, leave-of-absence or any other event type, and the requests will be reviewed by your supervisors.

Request planned time off


Create new planned time off requests.



Add a time off event.

Request a recurring time off event

Create long term recurring events for family leave, military leave, etc.



Add a long-term recurring event.

View Your Time Off Requests

To view your pending and current time off requests and their status simply go to the Time Off Worksheet and select *Upcoming time off*.

Time off worksheet options

- Time off overview
- Upcoming time off**
- Calendar Partitions
- Request planned time off
- Request a recurring time off event

Time off overview

ACTIVITY	CALENDAR START	CALENDAR END	TOTAL ACCRUED HOURS	SCHEDULED HOURS	ACCRUAL BALANCE	
Site 1 - Dallas, TX	01 Jan 2024	31 Dec 2024	FULL YEAR 224.00	-64.00	160.00	Show options
			YEAR TO DATE 224.00	-16.00	208.00	

Pending & Upcoming requested time off
This list shows you the pending and upcoming scheduled time off hours.

Start time	End time	Request date from	Request date through	Request type	PTO classification	Total hours of time off	Review status	Waitlist status	Comments	
04:00 am	12:00 pm	30 Jul 2024	30 Jul 2024	PTO	PTO	8.00	Approved	Not waitlisted	No, all day	Edit Delete
N/A	N/A	05 Aug 2024	06 Aug 2024	PTO	PTO	16.00	Approved	Not waitlisted	Yes, all day	Edit Delete
04:00 am	12:00 pm	19 Aug 2024	19 Aug 2024	PTO	PTO	8.00	Approved	Not waitlisted	No, all day	Edit Delete



Calendar partitions / advanced vacation

There are several advantages to using the time off worksheet/calendar partitions including—

- Ability to view a calendar showing blackout and brownout dates and other rules.
- During a bid round, the ability to view other agent’s requests (with or without picture identification – depending on the settings).
- Receiving an immediate estimate of whether your request is likely to be approved.
- Waitlist option for some time off requests.

If you are part of a calendar partition you cannot request time outside of the calendar, and if the calendar is in an active bid round, you cannot make a separate request for time off within the calendar dates.

Validation results	Comments
Failed	You cannot request time off outside the bounds of a defined Calendar Partition.

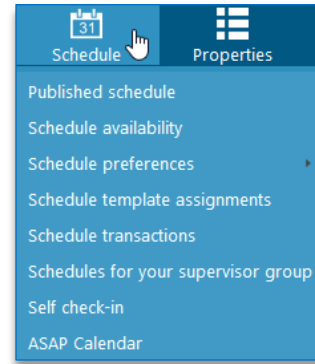
Any requests must be made through the bidding process. After all bidding is complete, the calendar may move to open selection with different rules (for example, some companies may have bidding for weeks of time, then move to open selection where people may request single days).

For complete information and specific instructions, refer to “Time Off – A Guide for Agents.”



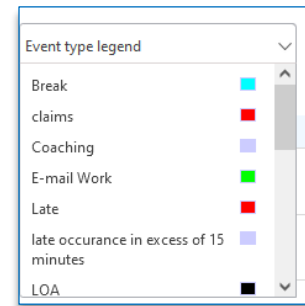
Schedule

Schedule is where you can view your current schedule, let your supervisor know your schedule preferences, check in for your shift, and more.



Published Schedule

Published schedule shows your schedule for the current week and includes color indicators that highlight breaks, lunch, and other events. This section is the same as the schedule module on the Today page, with a legend for each event type located in the top right corner. Hover over the timeline to view a tool-tip description.



Click *Show options* in the upper right to change the date range of the schedule report, then *Apply options* to run the new report and close the menu

Weekly Schedule
PUBLISHED SCHEDULE REPORT FOR AZZARITO, DEBORAH
 Including dates from Sunday, 28 Jul 2024 through Saturday, 03 Aug 2024
 Report run time: 30 Jul 2024 11:02 am

Event type legend: PC

Show options

Hide options

Azzarito, Deborah
 Sales/Service Rep

Report filters and options

From date: 7/28/2024

Through date: 8/3/2024

Time zone selection: Use my default time zone

Apply options

Additional options: Show this report in full-screen view



Schedule Availability

Submitting your schedule availability is a request, subject to approval by administrators. Once approved, the system will honor the requested availability.

Schedule Availability displays all created schedule availability, the status of each request (approved, denied, or pending), and allows you to request a new availability accommodation. To create a new availability request, select [Click here to create a new availability request](#).

Schedule Availability

Set up a new one
[Click here to create a new availability request](#)

Filter options

Narrow Report by Review Status: -- No Selection --

Narrow report by showing assignments effective on or after: 7/27/2021

Narrow report by showing assignments effective on or before: 8/3/2021

Reference Number	Effective Date	Description	Review Status	Availability	
4	8/2/2021	I'm not available on Tuesdays.		Mon(07:00:00 - 17:00:00);Wed(07:00:00 - 17:00:00);Thu(07:00:00 - 17:00:00);Fri(07:00:00 - 17:00:00);	Delete
6	8/30/2021	Tuesdays are OK after 8/30		Mon(07:00:00 - 17:00:00);Tue(07:00:00 - 17:00:00);Wed(07:00:00 - 17:00:00);Thu(07:00:00 - 17:00:00);Fri(07:00:00 - 17:00:00);	Delete

Enter the effective date and a description. Select available times for each day from the drop-down menus. To copy time to other days: click the check boxes next to the days you want to have the same time, then click *Copy* on the row with your preferred times. Click *Save* at the bottom. This will submit your preferred availability to your supervisor.

New schedule availability

Azzarito, Deborah

Effective Date:
7/30/2024

Description:
Fall school schedule

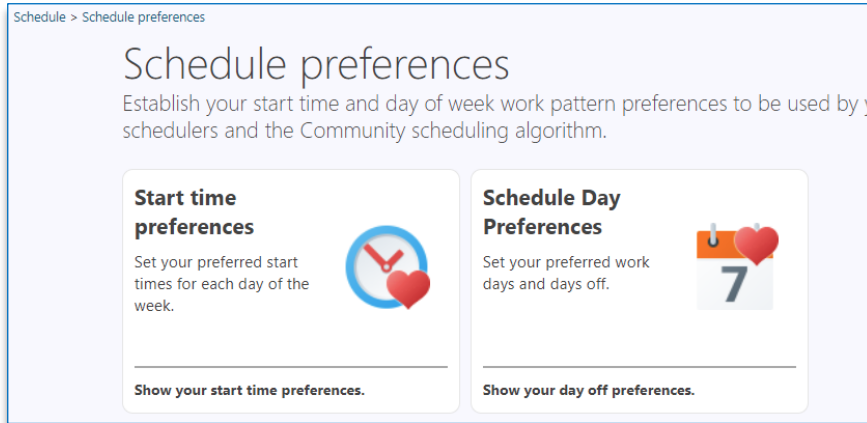
Availability Patterns

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



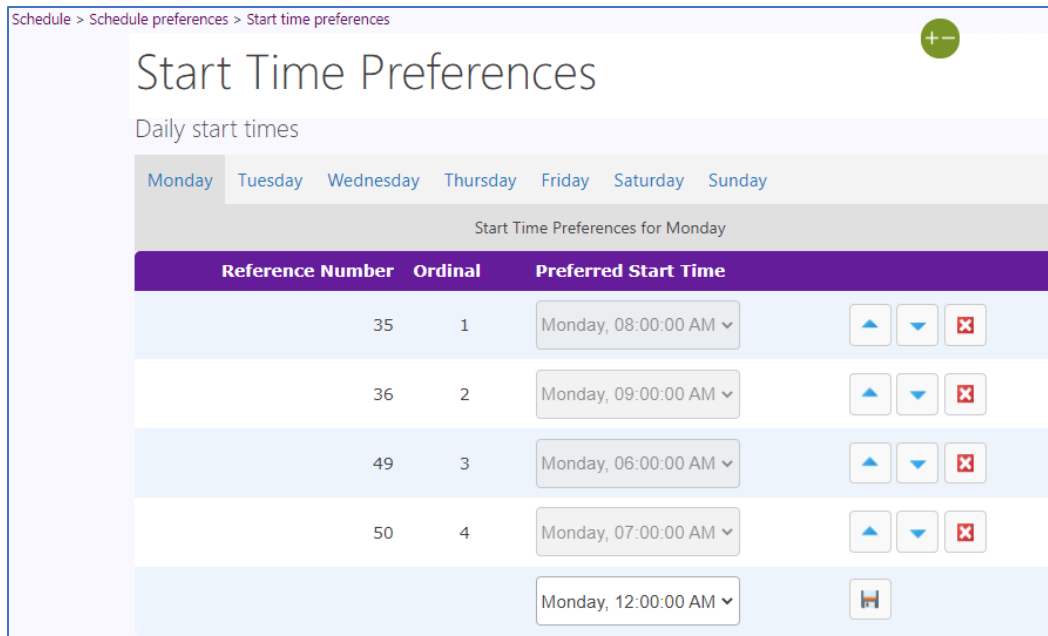
Schedule Preferences

Preferences will be considered when the system is creating the schedule but may not always be honored. The "Schedule Preferences" section has two parts: *Start time preferences* and *Schedule day preferences*.



Start Time Preferences

Allows you to establish any preferences you have for the beginning of a shift. You can create multiple start time preferences in the event that 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 the *Save* (floppy disk) icon.






You can use the table to copy your preferences across multiple days. If you would like to keep the same preferences throughout the entire week, simply check the boxes for the days that will have the same preferences then click *Replicate*.

Apply to Other Days

<input checked="" type="checkbox"/>	Monday
<input checked="" type="checkbox"/>	Tuesday
<input checked="" type="checkbox"/>	Wednesday
<input checked="" type="checkbox"/>	Thursday
<input type="checkbox"/>	Friday
<input type="checkbox"/>	Saturday
<input type="checkbox"/>	Sunday

Replicate 

Schedule Day Preferences

Allows you to identify which days of the week hold the highest importance for you in terms of days off. You may also indicate whether you would like to prioritize start time or day off preferences.

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.



Each day is assigned a point value, and the total for all days must add up to 100. The more points you assign to each day, the more priority that day's preference receives.

Day of Week	Relative Importance
Monday	80
Tuesday	20
Wednesday	0
Thursday	0
Friday	0
Saturday	0
Sunday	0
Total	100

Save Restore

Finally, you can indicate whether you value a specific day off versus consecutive days off.

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.

Schedule Template Assignments

Schedule Template Assignments allows you to search for and verify schedule parameters.

The Schedule Template Assignments tool contains various qualifiers you can use to narrow down schedules you have requested and see their status (Denied, Pending, or Approved).



After making your selections, click *Refresh* to view the schedule templates. Icons on the right indicate the review status

Schedule > Schedule template assignments

Schedule Template Assignments

Filter options

Narrow Report by Schedule Template Type: -- No Selection --




Narrow Report by Schedule Template Name: -- Select Template -- Clear

Narrow Report by Review Status: -- No Selection --

Narrow report by showing assignments effective on or after: 7/30/2024

Narrow report by showing assignments effective on or before: 8/6/2024

Refresh

Schedule Type	Schedule Name	Effective Date	Droppable?	Review Status
Fixed	Azzarito, D	12/27/2021	False	  

The highlighted icon verifies the requested schedule status. The green icon is approved, the red denied and the question mark indicates pending.


Review Status

Schedule Transactions

View pending or accepted transactions or create new transactions such as trading schedules with another agent or offering to work additional hours.

Schedule transactions

This Week's Transactions

Reference Number	Requesting Agent	Transaction Date	Description	Rating	Review Status
12	Badgett, Gregory	Wednesday, 04 Aug 2021	Can't work that day	☆☆☆	



Agent Schedules for Your Supervisor Group

View your teammates' schedules within the same supervisor group.




Self Check-in

Self check-in is simply a place to check-in to work for the day and make a comment if necessary. You only need to use this feature if you **don't** log into the phone system, the mobile app, or another device that measures your queue states (Login, On a Call, Available, etc.)

Self check-in

Check-in for **Duncan, Matthew** at Tuesday, 30 Jul 2024 11:59 am



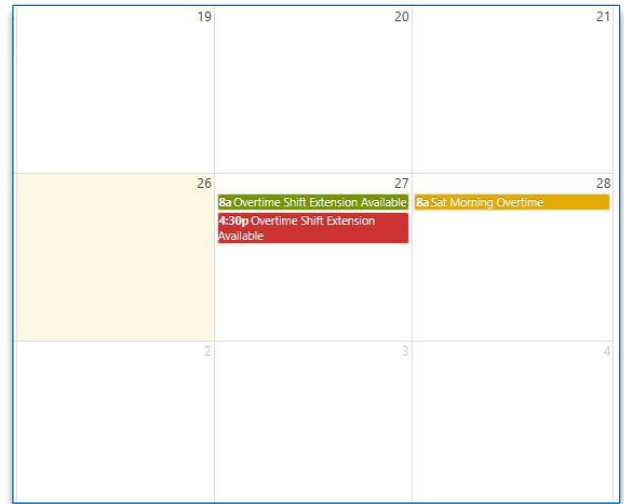
Check-in comments



ASAP Calendar

The Agent ASAP (Automated Schedule Adjustment Plans) calendar allows you to see all plans for which you are eligible and the disposition of the plan. You will receive a memo and pop-up notification when you are added to an ASAP calendar event. Color codes indicate whether you have accepted (green), rejected (red), or not responded to a given offer (yellow).

Click on the plan name to view a detailed description of the available offer and respond to the ASAP.



The option to accept or decline will depend on the disposition of the offer at the time of selection.

Properties and settings

Schedule Adjustment Type:	Create Overtime Shifts
Plan Name:	Overtime Shift Available
Schedule Date:	Thursday, 18 Jul 2024
Overtime Start Time:	18 Jul 2024 11:45 AM
Overtime End Time:	18 Jul 2024 05:45 PM
Overtime Available:	6.00 [Hours]
Created By:	Account, Service
Created On:	Thursday, 18 Jul 2024
Minimum / Maximum Agents Required:	N/A / N/A
Overtime Event Type:	Overtime

Accept this offer
Decline this offer

Overtime Shift Extension Available

Wednesday Aug 2021 12:00 pm - 08:00 pm

Accepted

4

12p Overtime Shift Extension Available

Overtime Shift Extension Available

Tuesday Aug 2021 06:00 am - 06:00 pm

Pending

10

6a Overtime Shift Extension Available

Voluntary Time Off Available

Thursday Aug 2021 12:00 pm - 08:00 pm

Declined

5

12p Voluntary Time Off Available

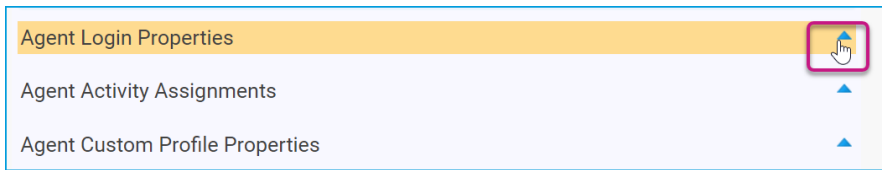


Properties

Properties includes your profile information. Most of the data fields are locked and can only be modified by an authorized user/administrator. The primary purpose of this page is to allow you to review the information for accuracy and to update your password.

Password update

Expand the Agent Login Properties section by clicking the arrow.



Enter your new password, enter again to confirm, then click *Update Password*.

Passwords must be a minimum of 8, 10, 12, or 15 characters (as determined by your administrator). If a strong password is required, it must also contain at least one uppercase character, one lowercase character, one number, and one special character (!@#\$\$%^&*).

Bickley, Sharon

Agent Profile

First Name: Sharon

Last Name: Bickley

Middle Initial:

Hire Date: 7/10/2017

Employee Id: SBickley

Title: Sales/Service Rep

Email Address:

Tiebreak Value: 0

Supervisor: Mitchell, Lauren

Assigned Site: Site 1 - Dallas, TX

Default Work Type: Work

Agent Local (Time Zone): (GMT-06:00) Central Time (US & Canada)

Agent Login Properties

Login Id: sbickley

Password:

Confirm Password:

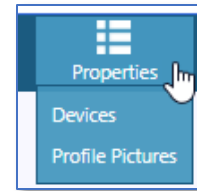
Update Password

Agent Activity Assignments

- Community Enterprise Model
 - Site 1 - Dallas, TX
 - Customer Program Service
 - Auto
 - Billing
 - Customer Onboard Service
 - New Customer Sales
 - Tier 1 support
 - Multimedia Sales
 - Sales Chat
 - Sales Email



Under the *Properties* menu are submenus where you can configure devices for your communications and select your profile picture.



Devices

Configure your communication channels here. There are several communication channels available, including email and SMS text message.

Review your current settings and click *Add new phone* or *Add new email* to configure additional channels.

The display of current devices provides the option to edit, delete, or deactivate that specific device.

Configure devices for **Azzarito, Deborah**
 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:
 (555) 555-1212 - personal cell
 Edit | Delete | Deactivate

[Add new phone](#)

Send a copy as an email to...


Configured email addresses:
 agent@mycompany.com - home email
 Edit | Delete | Deactivate

[Add new email](#)


Send a push notification to...

Configured push devices:
 Apple iPhone13.3 (iPhone)
 Delete | Deactivate

Automatically add a contact
 If you have a bar code scanner application on your mobile device, you can scan the code below to automatically add your WFM application's contact information.



Automatically configure mobile app
 If you have the Community Mobile app installed on your mobile phones, you can scan the code below to automatically configure the app.



iCal link for Calendar Integration
 Click the below to copy the link to your clipboard.

[Copy iCal Link](#)

Scan the top QR code with your mobile phone camera or QR code scanner to add Community to your contacts, then scan the bottom code with your mobile phone Community Everywhere app to configure the mobile application. Log in to the mobile application to configure push notifications.

Use the iCal Link to integrate your schedule and events with your Google or Outlook calendar.

Google calendar

1. Open Google calendar.
2. Go to settings > Add calendar > From URL.
3. Paste the URL copied from CommunityWFM Devices page.

The calendar events will appear on the Google calendar as part of an *Other* calendar.

Outlook

1. Open Outlook calendar.
2. Select *Add calendar*.
3. Select *Subscribe from web*.
4. Paste the URL copied from CommunityWFM Devices page.
5. Enter a name.
6. Select a color and charm (optional).
7. Select the location for the calendar.
8. Click Import.



Alternate methods

1. Paste the copied iCal Link into a different web browser tab.
2. When prompted, select a location to save the .ics file and save it.

Outlook

1. Navigate to the location where the file was saved.
2. Double click and select **Open with Outlook**.
3. When prompted, select **Import into your calendar**.

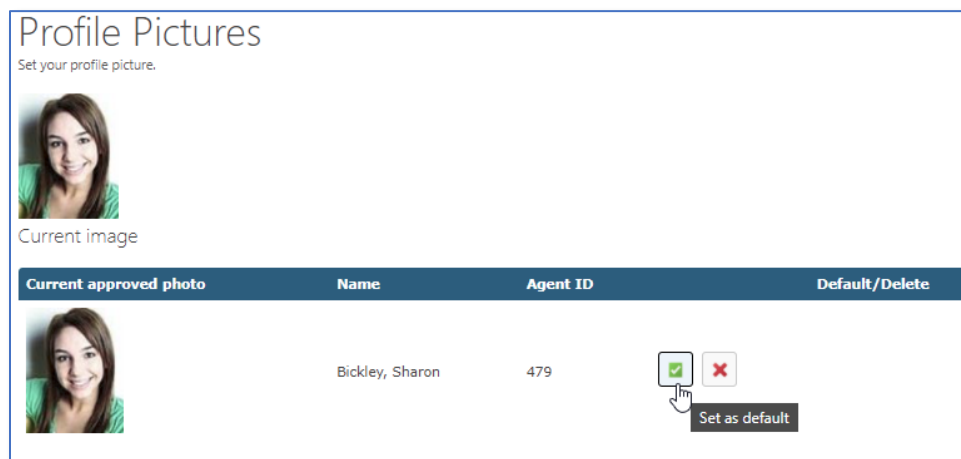
Google Calendar

1. Next to Other calendars, click the + to Add other calendars and select **Import**.
2. Under Import, click **Select file from your computer**.
3. Select the iCal.ics file and click **Open**.
4. Click **Import**.

Profile pictures

Select a new profile picture to use as a default from your set of approved images.


Upload a selfie from the mobile app and after approval by your supervisor, it will be available here for you to use. Set your preferred image as the default or delete any pictures you no longer wish to use.





Snap a selfie

In the mobile application go to Help | About and click the *Edit* icon under your picture to snap a selfie.



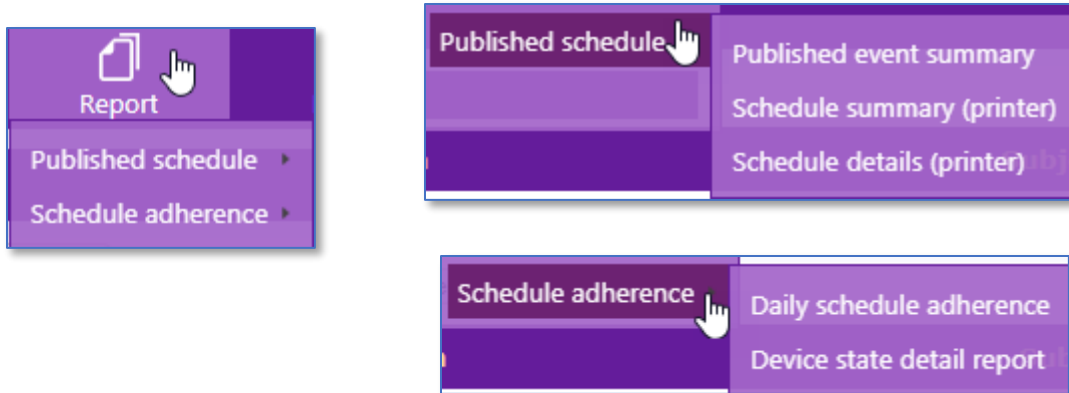
The screenshot shows a mobile application interface with a menu icon and 'Help | About' text at the top. Below this is a list of system information: App Version: 2.0, Data Service Version: 5.0.309.990, and Database Version: 5.0.309.990. There are two links: 'Support Site: support.wfmsg.com' and 'Privacy Policy: Privacy Policy Link'. A profile picture of a woman is shown with an 'EDIT' button overlaid on it. Below the photo is a list of user details: Name: Azzarito, Deborah; Title: Sales/Service Rep; Email: (blank); Hire Date: 21 Sep 2015; Role: Agent; Login Time: (blank).

App Version:	2.0
Data Service Version:	5.0.309.990
Database Version:	5.0.309.990
Support Site:	support.wfmsg.com
Privacy Policy:	Privacy Policy Link
	
	
Name:	Azzarito, Deborah
Title:	Sales/Service Rep
Email:	
Hire Date:	21 Sep 2015
Role:	Agent
Login Time:	



Report

Use Report to view data about your schedule and your work. This data can range from an overview of hours to a breakdown of how well you are adhering to your schedule.



Published Schedule

Published Event Summary

Select the options then click *Apply options*. This report is a summary of all the events on your schedule. You can review the data by date, week, month, year, or day of week (DOW). Use the *Show options* button to select different parameters for the report.

Schedule Summary (printer)

Select the week, whether to include off-site events, then click *Generate report*.

Published schedule report

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

From date
8/2/2021

Include off-site events in paid reports?
Do not include off-site events (consistent with earlier versions) ▼

Time zone selection
Use my default time zone ▼

Generate report



Once generated, the printer-friendly summary report contains a week's worth of scheduled hours, with no details other than the start and finish time. You can use the hamburger menu (three lines) in the top right to print the table or download as a .csv or .xlsx file.

Published Schedule Summary Report

Applies to Activity: Community Enterprise Model [Optimized by Community WFM]

From: Monday, 02 August 2021 Through Sunday, 08 August 2021
Using Time Zone: (GMT-06:00) Central Time (US & Canada)

Agent Name	Monday 02 Aug 2021	Tuesday 03 Aug 2021	Wednesday 04 Aug 2021	Thursday 05 Aug 2021	Friday 06 Aug 2021	Saturday 07 Aug 2021
Badgett, Gregory		06:00 AM-02:30 PM 03:00 PM-03:15 PM		06:00 AM-03:15 PM	01:00 PM-08:00 PM	06:00 AM-02:30 PM

Print table contents
Download as CSV
Download as XLSX

Schedule Details (printer)

The schedule details report contains the schedule along with dates and times of scheduled events (breaks, lunch, etc.) in a printer-friendly table format. To print this report, right click and select print.

Published schedule report

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

From date
8/2/2021

Include off-site events in paid reports?
Do not include off-site events (consistent with earlier versions)

Time zone selection
Use my default time zone

Generate report

Schedule Date	Start Time	End Time	Type	Duration (In Hours)	Description
Monday, July 22, 2024					
Monday, 22 July 2024	3:00:00 PM	5:15:00 PM	Work	2.25	Scheduled Work
Monday, 22 July 2024	5:15:00 PM	5:30:00 PM	Break	0.25	Off phone interval
Monday, 22 July 2024	5:30:00 PM	7:30:00 PM	Work	2.00	Scheduled Work
Monday, 22 July 2024	7:30:00 PM	8:30:00 PM	Lunch	1.00	Off phone interval
Monday, 22 July 2024	8:30:00 PM	10:15:00 PM	Work	1.75	Scheduled Work
Monday, 22 July 2024	10:15:00 PM	10:30:00 PM	Break	0.25	Off phone interval
Monday, 22 July 2024	10:30:00 PM	12:00:00 AM	Work	1.50	Scheduled Work
Tuesday, July 23, 2024					
No Schedule Intervals					



Schedule Adherence

Schedule adherence allows you to view how closely you adhere to your published schedule. There are three options: *Schedule Adherence Summary – Agent*, *Daily schedule adherence* and *Device state detail report*. In addition, you can view daily, weekly (7 day rolling), and monthly (first of month through today) summary on your homepage in the *Agent Adherence Summary* module.


Schedule adherence

Generate real-time or historical reports based on agent schedule adherence.

Schedule adherence summary

Agent


Report and review Adherence Interval Data by Agent.



[Launch the Adherence Summary Report](#)

Daily schedule adherence


Show the daily schedule adherence report for any date range.



[Go to the daily schedule adherence report.](#)

Device state detail report

Show the detailed list of device state transactions that make up your adherence statistics.

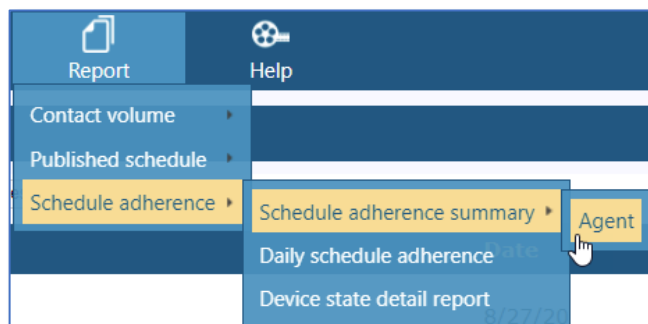


[Go to the device state detail report.](#)

Schedule Adherence Summary—Agent

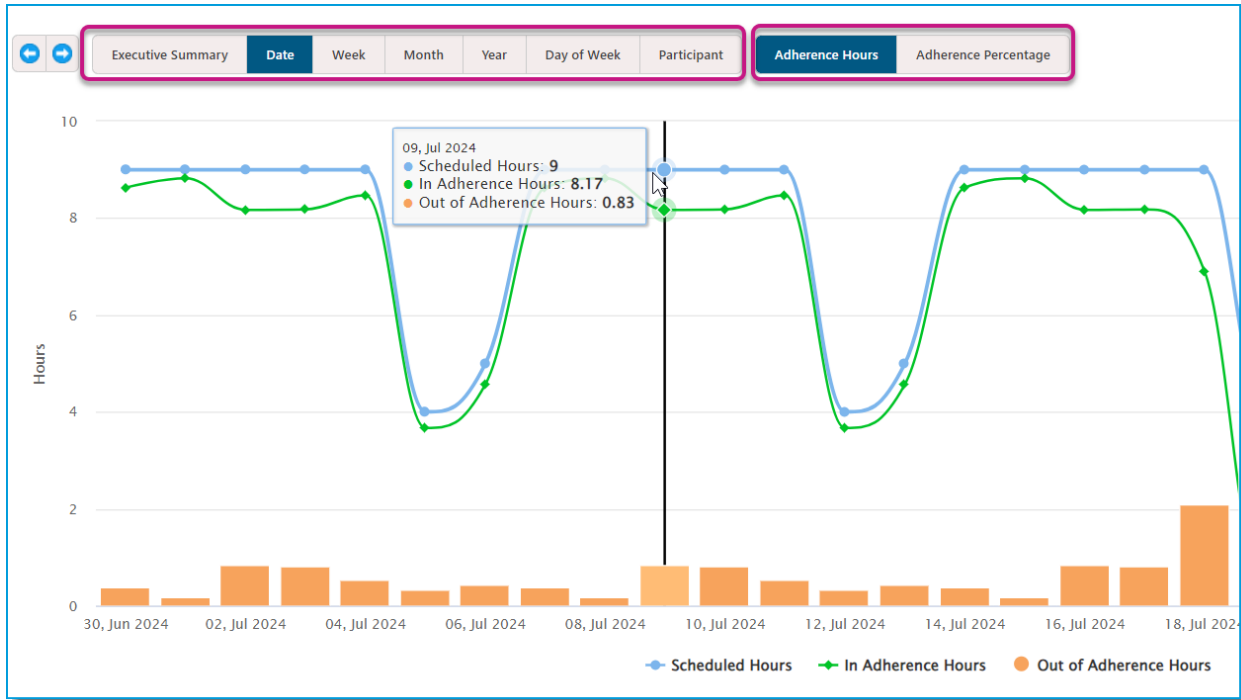
This report allows you to customize the date range for reviewing historical adherence data.

After opening the report, click *Show options*, Select the date range, then click *Apply options*.



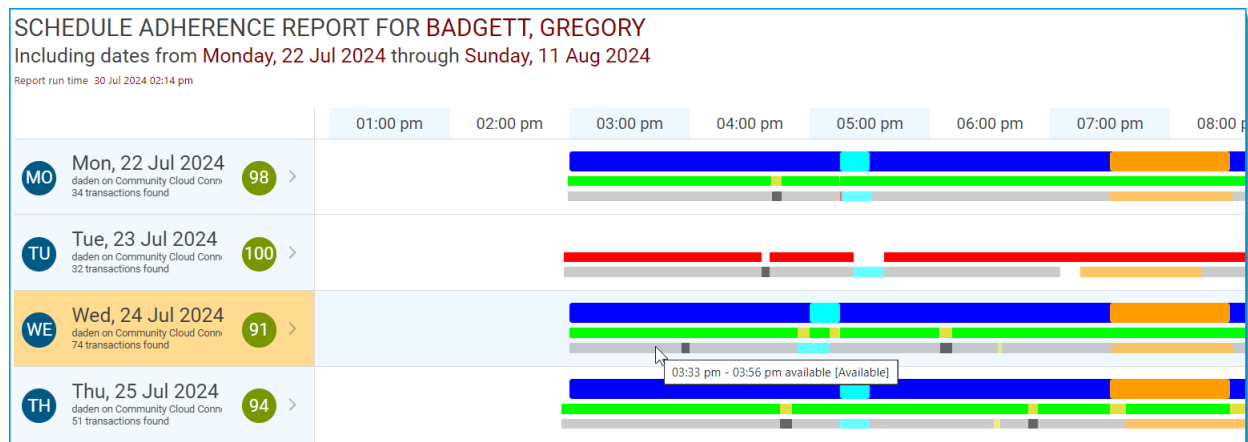


Use the tabs at the top of the report to further drill down into the adherence data. Hover over the graphs to pop-up specific data points.



Daily schedule adherence


Daily schedule adherence allows you to view your adherence score for the day within the specified dates. It provides a schedule graph that includes your schedule as the top line, a line underneath your schedule comparing how closely you're following the published schedule, and a third line is a graphic representation of your device states for the day. You can hover over any section of any row to see a pop-up describing the state.





Device state detail

Device state detail report details all of your state transactions. Each transaction contains the name, description, date, start time, end time, and whether the even type is in queue (True) or out of queue (False). Reach this report using the menu, or from the Daily Schedule Adherence, click on the day/date on the left to open the detail state transactions report for that day.



State transactions for **Badgett, Gregory**

Tuesday, 30 July 2024

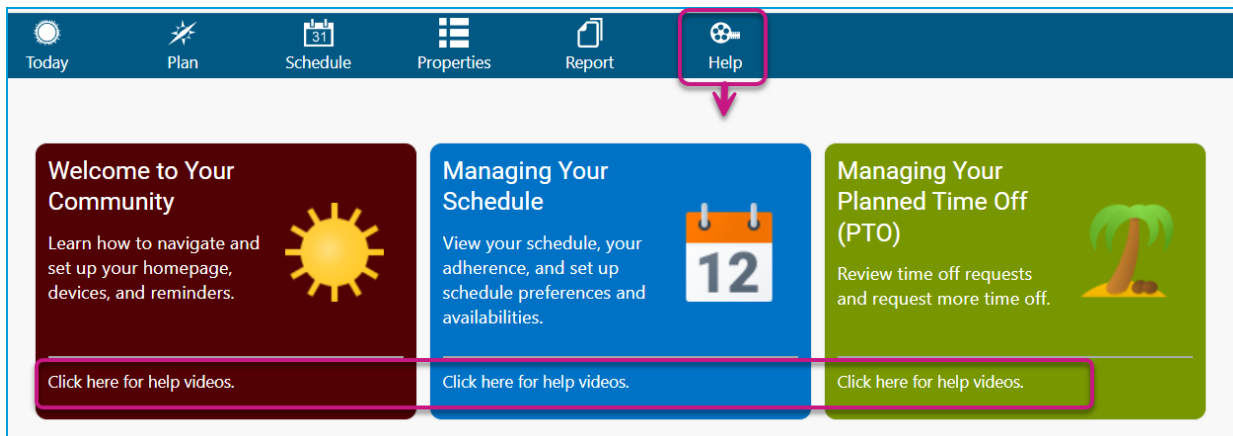
State Name	Description	State ID	Transaction Start	Transaction End	Duration (Hours:Minutes:Seconds)	In Queue
acd call	On ACD Call	2	29 Jul 2024 11:25:55 PM	29 Jul 2024 11:59:32 PM	00:33:37	True
follow up	Follow Up	2	29 Jul 2024 11:59:32 PM	29 Jul 2024 11:59:52 PM	00:00:20	True
available	Available	2	29 Jul 2024 11:59:52 PM	30 Jul 2024 12:00:02 AM	00:00:10	True
gone home	Gone Home	3	30 Jul 2024 12:00:02 AM	30 Jul 2024 12:04:25 AM	00:04:23	False
gone home	Gone Home	3	30 Jul 2024 12:04:25 AM	30 Jul 2024 02:56:35 PM	14:52:10	False
gone home	Gone Home	3	30 Jul 2024 02:56:35 PM	30 Jul 2024 02:57:11 PM	00:00:36	False
available	Available	2	30 Jul 2024 02:57:11 PM	30 Jul 2024 02:57:58 PM	00:00:47	True
acd call	On ACD Call	2	30 Jul 2024 02:57:58 PM	30 Jul 2024 03:12:49 PM	00:14:51	True
follow up	Follow Up	2	30 Jul 2024 03:12:49 PM	30 Jul 2024 03:13:09 PM	00:00:20	True
available	Available	2	30 Jul 2024 03:13:09 PM	30 Jul 2024 04:17:26 PM	01:04:17	True
acd call	On ACD Call	2	30 Jul 2024 04:17:26 PM	30 Jul 2024 04:25:00 PM	00:07:34	True
follow up	Follow Up	2	30 Jul 2024 04:25:00 PM	30 Jul 2024 04:25:20 PM	00:00:20	True
available	Available	2	30 Jul 2024 04:25:20 PM	30 Jul 2024 04:36:12 PM	00:10:52	True
restroom	Restroom	3	30 Jul 2024 04:36:12 PM	30 Jul 2024 04:40:09 PM	00:03:57	False
available	Available	2	30 Jul 2024 04:40:09 PM	30 Jul 2024 05:00:19 PM	00:20:10	True



Help

Help contains videos that explain different parts of the agent portal. There are three groups: Welcome to Your Community, Managing Your Schedule, and Managing Your Planned Time Off.

Select *Click here for help videos* in a group and the available videos will open at the bottom of the page. Click your selected video to play the content in a new browser window.





Agent event reminders and notifications

The Agent Event Reminder pop-up enables both notification messaging, as well as ASAP offers. The top portion of the window provides reminders for enabled events. Administrators enable reminders for breaks, lunches, meetings, or any other events.

Click *Snooze* to close the pop-up reminder. Administrators configure the snooze duration and pop-up frequency.

The bottom portion of the window shares useful information such as schedule change notifications, instant messages, and offers from ASAP.

Current event reminders & notifications
05 Aug 2021 11:47:54 AM

Event type	Description	Location	Start time	End time	
■	Break		11:00:00 AM	11:15:00 AM	Starts In Past Due Delete

Delete all

Notification details

Your schedule has changed on 17 Dec 2020 as a result of a schedule change plan. Verify your schedule and see your WFM Administrator with any questions. Delete

Your published schedule for 27 Oct 2020 has changed. [Click here to show your published schedule.](#) Delete

Your published schedule for 27 Oct 2020 has changed. [Click here to show your published schedule.](#) Delete

Your published schedule for 27 Oct 2020 has changed. [Click here to show your published schedule.](#) Delete

Snooze