



CommunityWFM

Enterprise vs. Essentials

Version: 2025



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Introduction

The CommunityWFM Essentials solution was created to meet the need for a small business (fewer than 100 agents) to manage their contact center workforce like a large organization.





























The following icons used in this document identify certain features / functions that are or are not included in a production edition.

Icon	Comments
	Indicates that the edition supports the feature.
	Indicates that the edition does not support the feature.
	Indicates that the edition supports the feature but with modifications.

Enterprise vs. Essentials

	Enterprise	Essentials
Number of agents	100–10,000	< 100
Number of sites	Multi-site, virtual sites	Single site
Work at home agents		
ACD integration	Multiple	Single
Outlook, Teams, Slack integrations		
Forecasting	Advanced	Basic
AI Forecasting		
Schedule optimization		
Advanced scheduling and shift bidding		
Intraday management & reporting		



	Enterprise	Essentials
Automated Schedule Adjustment Plans (ASAP)		
Adaptive intraday management		
Agent schedule adherence		
Agent self-service kiosk (ASSK)		
Translations		
Data subject rights		
Adherence dashboard		
Automated attendance monitor		
Mobile app		
Advanced data management		
Time off management		
SMS and internal messaging		
Internal memos		
Pop-up notifications and reminders		

Product overview

Authentication

Both editions currently support the following authentication methods:

- NT / Active Directory authentication
- Application authentication
- Application authentication with 2FA (two-factor authentication)
- 3rd party pass-through authentication
- SAML 2.0



Today's Community home page

In **Enterprise**, the home page (Today's Community) displays information using a collection of customizable, selectable components. The home page displays these in any of three layout options using a user-selected desktop theme that governs font styles, colors, etc.

Essentials supports a single desktop theme, either a partner-provided theme or the CommunityWFM default theme. Additionally, Essentials leverages a "master layout" function dictating the layout and content of the Today's Community home page.





Essentials does not include the ability for users to customize their desktop layouts in any way.

Pre-defined Today page layout for Essentials:























Narrow Components	Wide Components
Today's Hot News	Memos
All About Me	Weekly Schedule
Schedule Transactions	Pending Request Worksheet (for Supervisors and above)

Home page components

Some of the home page components available in the Enterprise edition do not apply to Essentials because the underlying functions are not included.

Component	Description	Enterprise	Essentials
Today's Hot News	Scrolling banner with user-defined messages.		
Memos	Internal messaging platform for ad-hoc messages (Enterprise only) and system notifications.		









Component	Description	Enterprise	Essentials
Weekly Schedule	Shows the current week for an agent or the current day's schedule for all members of a supervisor team.		
Schedule Transactions	Shows outstanding schedule transaction (trades, give away, etc.)		
All About Me	Shows information about the current user.		
Today's Survey & Results	Allows users to vote on survey questions as well as allows administrators to add new surveys.		
Pending Request Worksheet	Displays pending availability and time off requests for agents in a supervisor group (supervisor role and above).		
Schedule Adherence Monitor	Current adherence data for custom activities or groups.		
Automated Schedule Attendance Monitor	Arrival and attendance summary.		
Today's Links	Custom internal or external links.		
Custom User Groups	Customized groups.		
Agent Adherence Summary	Summary data from yesterday, this week, and this month.		
Schedule Bid Status	Shows the status of any schedule bids that include the agent as a participant.		



Main menu options





Today's Community

The menu options under Today's Community are disabled for Essentials. This includes:





Feature	Description	Enterprise	Essentials
Calendar view	Provides an alternative display mode for events and to-do items.		
Impersonate supervisor	Allows one supervisor to assume the identity of other supervisors to review schedules, time off requests, etc.		
Send a message	Allows management to send a message via any supported notification channel to one or more agents.		

Settings





Application settings

Menu item	Description	Enterprise	Essentials						
Global settings & Preferences	Allows customizing the behavior of a wide range of features.								
Color palette	Allows customizing the colors used throughout the application.								
	The color palette for Essentials includes a fixed inventory of colors, added when the software is installed, with no edits permitted to the list of colors.								
	<table border="1"> <thead> <tr> <th>Color</th> <th>HTML Code</th> </tr> </thead> <tbody> <tr> <td>Red</td> <td>#FF0000</td> </tr> <tr> <td>Green</td> <td>#00FF00</td> </tr> </tbody> </table>		Color	HTML Code	Red	#FF0000	Green	#00FF00	
Color	HTML Code								
Red	#FF0000								
Green	#00FF00								





Menu item	Description	Enterprise	Essentials																														
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Adherence thresholds	Allows customizing the time thresholds associated with different alert colors for real-time adherence reports.																																
Event type settings	Allows building a set of custom event types that appear on schedules as well as configuring the layering priority for each event type.		 (not customizable)																														















Menu item	Description	Enterprise	Essentials																					
<p>The event type settings include two individual components, event type and event priority, neither of which are customizable in Essentials.</p> <p>At activation, Essentials includes an inventory of default priorities used to “stack” events on schedule reports based on best-practice experience. These default priorities include:</p> <table border="1"> <thead> <tr> <th>Priority</th> <th>Name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Work</td> <td>Used for base-level in-queue intervals</td> </tr> <tr> <td>100</td> <td>Scheduled break</td> <td>Used for short interval breaks</td> </tr> <tr> <td>150</td> <td>Scheduled lunch</td> <td>Used for longer interval lunches</td> </tr> <tr> <td>175</td> <td>Scheduled meeting</td> <td>Used for on-site meetings</td> </tr> <tr> <td>400</td> <td>Scheduled PTO</td> <td>Used for planned and paid time off</td> </tr> <tr> <td>600</td> <td>Unscheduled time off</td> <td>Used for unplanned/unpaid time off events</td> </tr> </tbody> </table>				Priority	Name	Description	1	Work	Used for base-level in-queue intervals	100	Scheduled break	Used for short interval breaks	150	Scheduled lunch	Used for longer interval lunches	175	Scheduled meeting	Used for on-site meetings	400	Scheduled PTO	Used for planned and paid time off	600	Unscheduled time off	Used for unplanned/unpaid time off events
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400	Scheduled PTO	Used for planned and paid time off																						
600	Unscheduled time off	Used for unplanned/unpaid time off events																						
People settings	Allows customizing the various components of people, including custom properties, groups, classifications, etc.																							
Administrative settings	Allows administrators to customize the more advanced components of the application.																							

Administrative settings

Essentials supports only a small subset of the functions.







Feature	Description	Enterprise	Essentials
Notifications	Allows configuring notification channels and specific notification messages.		





















Feature	Description	Enterprise	Essentials
Application menus	Allows customizing the menu options available by role, as well as creating custom menu options.		
Security settings	Allows configuring the security subsystem for specific secure asset types.		
Services	Allows configuring settings for application services.		
Data retention policy	Allows configuring data retention policies.		
Mobile application setup	Allows access to the setup options for the mobile app.		
Data Summary Utility	Allows triggering the adherence summary process.		

Application services

Most application services are rendered unnecessary by removing key elements for Essentials.

Service	Description	Enterprise	Essentials
Agent synchronization monitor service	Monitors changes to key attributes of agents (people) that serve as a source for an agent auto-sync template.		
Auto-approve service	Automatically approves or denies time off requests based on user-defined rules.		
Automated Forecast Service	Automatically runs configured forecasts using machine learning.		























Service	Description	Enterprise	Essentials
Automated schedule attendance monitor	Monitors phone state activity and automatically checks agents in and (optionally) creates late check-in events.		
Data retention service	Enforces data retention policies and "run now" events.		
Data targets service	Provides export functionality for a variety of configured data targets.		
PTO calendar partition monitor service	Monitors PTO calendar partitions for expired open selections as well as PTO bid round expirations.		
Published PTO accrual calendar monitor service	Monitors PTO accrual calendars to calculate rollover hours, expired rollover hours, etc.		
Schedule bid monitor service	Automatically opens or closes schedule bids on a time-delay basis.		
Collection point synchronization service	Automatically synchronizes collection points to leaf-node activities.		
Remote Bridge Notification Service	Distributes notifications to remote channels like SMS, Mobile, and Email gateways.		
Schedule adherence summary service	Creates and maintains schedule adherence summary statistics by participant and time interval.		



People settings

Essentials does not support most of the configuration settings for people.

Feature	Description	Enterprise	Essentials
Custom profile properties	Allows addition of custom properties to user profiles		
Custom user groups	Allows creating ad-hoc groups of people		
Region	Allows setting the preferred display language.		
Employee classifications	Allows creating custom employee classification for reporting purposes		 Includes: <ul style="list-style-type: none"> • Full Time • Part time
Ranking profiles	Allows configuring custom sorting groups for seniority scheduling, bidding, etc.		
Restricted Action Plans	Allows restricting access to features and functions for a date range.		
Security	Allows configuring access to a user profile.		
Profile photos	Add agent photos or upload selfies from a mobile device.		 agent upload not available
External devices	Connect to email and mobile devices.		
Agent synchronization	Synchronize settings between agents.		













Data sources

Essentials is restricted to a single data source for data collection.

Setup options

Users configure the connection settings to the underlying telephony system, like the current data source worksheet but with a simplified design.

Setup option	Description	Enterprise	Essentials
Basic properties	Defines the basic properties of the data source, including type, name, collection interval, etc.		
Connections	Advanced features specific to the underlying telephony platform.		
Collection points	Maps telephone system queues / skills / splits / etc. to elements inside the application.		
Device states	Maps agent phone states to known values inside the application.		
Security	Allows limiting access to this data source using the application wide security tool.		

Reports

Allows a quick and convenient way to run a contact volume and handle time history report for the selected data source and (optionally) collection point for a date range.

Revise

Essentials supports the ability to modify the historical contact volume and handle time for a collection point by specific interval or bulk inputting values.

Import

Essentials supports the ability to import historical contact volume history or collection points associated with the data source.













Enterprise model

Essentials simplifies the way the users construct and maintain the Enterprise Model.



Activation creates the “corporate activity” as well as an initial “Site” activity. Additionally, Essentials maintains synchronization between collection points (in Data Collection) and Activities (on the Enterprise Model).

Essentials does not support “Rollup” or “Virtual” activity types.









Feature	Description	Enterprise	Essentials
Physical site	Defines a physical location within the organization.		
Subordinate activity	Defines a reporting activity that is paired with one or more data collection points.		
Virtual activity	Defines an activity that is split between two or more physical locations in a call sharing environment.		
Enterprise	Defines the root-level activity type (corporate activity).		
Reporting Rollup Activity	Defines a group of subordinate activities that are grouped together for convenient reporting purposes.		

Enterprise Activity features

The Enterprise (root-level) activity feature set is largely unchanged, with the feature set comparison defined below.

Feature	Description	Enterprise	Essentials
Basic properties	Allows setting the basic properties of the root-level activity.		



Feature	Description	Enterprise	Essentials
Work habits and hours	Allows specifying global work patterns.		
Child or subordinate activities	Allows creating and viewing child activities.		
Forecast targets and defaults	Allows setting global forecast defaults for service level type and shrinkage values.		
Security	Allows controlling access to this activity via the security configuration screen.		





Child Activities of the Enterprise









Enterprise supports Physical Site and Virtual Activity types as immediate children. Essentials does not support Virtual Activities; therefore, Essentials only allows Site subordinates. Essentials imposes a further limitation to a single Site definition created during the initial set up.

Feature	Description	Comments
New Site / Virtual Activity	Allows creating new subordinate activities based on the supported subordinate activity types for an Enterprise Activity.	The <i>New</i> button is disabled for Essentials.
Delete Activity	The delete button allows deleting a Site and all subordinate activities.	<i>Delete activity</i> is not available in Essentials. <i>Edit Activity</i> is available in Essentials.









Subordinate Activity Features

Feature	Description	Enterprise	Essentials	Comments
Collection points	Identifies one or more data collection points that provide the activity with historical contact volume data.			Essentials supports a 1:1 relationship between subordinate activity and collection points.
Security	Allows controlling access to this activity via the security configuration screen.			





Feature	Description	Enterprise	Essentials
Forecast defaults	Allows setting forecast defaults for service level type and default shrinkage values.		
Assigned people	Allows quick access to the people assigned to the activity.		
Today's volume	Allows quick access to the contact volume reports.		
Activity calendar	Shows the occurrences of special calendar days for the selected activity.		



Service level defaults



Service metric	Description	Enterprise	Essentials
Average Speed to Answer	Uses ASA as a service target type, with a default of 20 seconds.		
Service Level	Uses a combination of % of contacts answered within a time threshold. Default is 80% answered in 20 seconds.		
Deferred Service Level	Describes a grade of service that is longer in scope than ASA or SL. Used typically with email, mail, or fax (non-synchronized media types).		

Shrinkage defaults









Type	Description	Enterprise	Essentials
Discretionary	Default is 20%.		
Non-discretionary	Default is 10%.		

Media types

Essentials only supports media types typically associated with service level or average speed of answer service metric types.

Feature	Description	Enterprise	Essentials
Telephone	The telephony platform delivers contacts agents assigned to this activity via phone.		



Feature	Description	Enterprise	Essentials
Email	An associated email application delivers contacts to agents assigned to this activity via email client.		
Web-based Chat	A chat system manages chat sessions between agents assigned to this activity and endpoints.		
Fax	A fax server system delivers electronic fax messages to agents assigned to this activity.		
Standard mail	Contacts delivered via physical mail.		

Collection Points for subordinate activities

Essentials requires synchronization between data collection point management and their associated leaf-node activities.









Essentials disables the following features from the "Collection Points" interface.

Feature	Description	Comments
"Delete" on the collection point list	Allows disassociating the collection point from the Subordinate Activity.	The "Remove" button is disabled for Essentials on the Enterprise Activity.
"New" Collection Point	Allows associating one or more additional collection points to the Subordinate Activity.	The "New" button is disabled for Essentials for collection points.









Schedule templates

Essentials allows users to configure schedule templates to define work patterns but will restrict the available schedule template types to fixed, common day floating, and rotating.





Feature	Description	Enterprise	Essentials
Break sets	Allows configuring off-phone periods used in schedule templates.		
Schedule templates	Allows creating fixed, flexible, or rotating shift templates used in schedule optimization.		 Limited selection
Assignments	Allows assigning people to schedule templates based on an effective assignment date.		
Assignment profiles	Allows creating an inventory of schedule template assignments with a name.		

Schedule template types















Schedule Type	Description	Enterprise	Essentials
Fixed	Uses a fixed start / end time and (optionally) fixed break times.		
Floating	Uses floating windows for start times and off-phone periods as well as flexible day patterns.		
Common day floating	Uses floating windows for start times and off-phone periods as well as flexible day combinations.		
Rotating	Allows schedulers to set up rotations of schedule template assignments.		



Schedule Type	Description	Enterprise	Essentials
Composite	Allows schedulers to configure schedule templates that are composed of other templates.		

People & agent templates









Essentials includes the “People” options but with a limited set of functions.

Feature	Description	Enterprise	Essentials
People	Presents the “People hub” with options to add, import, or select people to edit.		
Agent templates	Allows creating “what-if” type agents.		
Synchronize people	Allows manually or automatically synchronizing key configuration properties across groups of people.		
Data source logins	A report showing all people and their default data source logins for adherence and showing people with no logins.		
Cross-training analysis	Shows the clusters of cross-trained agents and calculates the overall cross-training factor.		
Device setup report	Allows setting up remote devices (phones, etc.) and external email accounts for notifications.		
Photo queue	Allows managing the set of approved photos that people can use for their profile picture.		



People hub

The people hub is the entry point to adding, editing, and removing people from the application.

Feature	Description	Enterprise	Essentials
Set up new people	Allows adding new people by filling in a standard web form.		
Import existing people	Allows importing from a variety of supported import sources.		
Manage existing people	Allows selecting the "scope" for choosing how to display a list of people.		
Recent people	Displays a list of the most recently viewed people profiles.		





Managing existing people

Essentials only supports lists of people by the following scope types:








- All people currently defined
- People by Enterprise Model
- People by supervisor group
- People by employee classification

Custom user group functions are not part of Essentials.























Editing the properties of an individual person includes the following feature set:

Element	Description	Enterprise	Essentials
Properties	Basic user settings such as name, hire date, supervisor, etc.		
First name, last name, middle initial	Allows setting the name.		



Element	Description	Enterprise	Essentials
Hire date	Specifies the onboard date.		
Tiebreak value	Specifies a user-defined tiebreak (an integer between 0 and 1000).		
Employee ID	Specifies the employee ID; this is a user-interpreted value not related to system or device login.		
Title	The person's title.		
Email Address	The person's principal email address. Note that this is not related to email addresses used for remote notifications.		
Assigned supervisor	The person's immediate supervisor, or "No Supervisor" if the person is at the top of the organization chart.		
Assigned site	The physical location that the person reports to.		
Work type	The default type for scheduled work events.		
Time zone	The time zone designation for the agent; "Default" value inherits the value from the Assigned Site.		
Region	Allows setting the preferred language. Default inherits from the EM.		
Employee Classification	Essentials includes only Full time and Part time.		



Element	Description	Enterprise	Essentials
Application role	The assigned role (Agent, Supervisor, Scheduler, or Administrator).		
User tags	A user-defined collection of "hash tags" used in Community Groups.		
Activities	Settings for assigned activities.		
Scheduling	Assign agents to schedule templates using an effective date.		
Schedule templates	Assign schedule template(s).		
Availability	Establish available work times based on an effective date.		
Day Off Preferences	Identify most preferred day of combinations for scheduling.		
Start Time Preferences	Identify most preferred start times.		
Adherence	Matches agents to their device logins for adherence data collection and reporting.		
Time off settings	Set up hire date delays, time off rules source, RAPs, assign PTO policies, review classification summary.		 Only hire date delay
Pending and upcoming time off	Review inventory of PTO requests		



















Element	Description	Enterprise	Essentials
Restricted action plans	Allows restricting access to specified actions for predetermined intervals.		
Employment transitions	Tracks the employment transitions for an individual.		
Security	Allows administrators to configure the access privileges to an agent row.		
Profile photos	Allows associating a photo with an agent.		
External Devices	Allows setting up notification devices like external email addresses and mobile phones.		
User group membership	Allows configuring group membership for reporting purposes.		
Agent synchronization	Shows synchronization history for this agent.		
Send a Message	Allows administrators to send an ad-hoc message to an individual using any of the available notification channels.		
Attendance Log	Displays the list of agent check-ins.		
Data Subject Rights	Options to support data subject access rights and complete requests		















Plan

All things Time off

Time off requests are supported in both the Essentials and Enterprise Editions. However, advanced vacation features and some options under the reporting menu are not supported in Essentials.

Feature	Description	Enterprise	Essentials
<i>Time off settings</i>			
Time off rule settings	Allows customization of rules used to evaluate time off requests.		
Accrual schedules	Allows setting up accrual schedules based on years of service.		
PTO classifications	Groups event types into classifications.		
PTO policies	Establishes accrual rules and associated classifications.		
PTO bid round exceptions	Creates custom reason codes.		
PTO bid round standby	Creates custom reason codes.		
<i>PTO calendars</i>			
Working accrual calendars	Develops accrual transactions, withdrawals, rollovers, and PTO balances.		
Published accrual calendars	Review and edit accrual transactions, withdrawals, rollovers, and PTO balances.		



Feature	Description	Enterprise	Essentials
Calendar partitions	Establishes time off rules, bidding rules, and manage the time off bidding process.		
<i>Time off events</i>			
Create planned time off events	Creating new time off requests for individuals or groups.		
Create recurring time off events	Creating recurring events for individuals or groups.		
Create intraday events	Adding time away events for a single date for individuals or groups.		
<i>Time off reports</i>			
Enterprise model	Report that shows summarized time off events for a date range and activity.		
Supervisor tree	Report that shows summarized time off events for a date range and supervisor tree.		
Custom user group	Report that shows summarized time off events for a date range and members of a custom user group.		

Schedule transactions

Schedule transactions are included in both Essentials and Enterprise.



Auto-approve service

The Auto-approve service is included in both Essentials and Enterprise.

Feature	Description	Enterprise	Essentials
Auto-Approve rules	Allows establishing time off rules that apply to members of an activity or supervisor group.	✔	✔
Current rules report	Shows a consolidated view of current auto-approve rules in effect by activity or supervisor.	✔	✔

Auto-Approve Rules

Auto-approve rules can be applied to any activity or supervisor in both Essentials and Enterprise.

Rule	Enterprise		Essentials	
	Supervisor	Activity	Supervisor	Activity
Blackout Date	✔	✔	✔	✔
Brownout Date	✔	✔	✔	✔
Minimum Request Interval	✔	✔	✔	✔

Special calendar events

Special calendar events are not included in Essentials.

Self-service validation plan

Associated with the ASSK, this is not included in Essentials.







Forecast

Essentials does not include a working forecast. Essentials automates the process for generating and publishing contact volume and staffing requirements forecasts.





1. The user specifies a “default” forecast profile from the list of defined profiles that is used in the auto-generated forecast process.
2. Using this default forecast profile, the system generates contact volume and handle time forecast intervals for all leaf-node activities.
3. Essentials uses the “Classic Community” simple average forecasting method.
4. The system inserts the newly forecasted intervals into future-looking tables based on a fixed value for lookahead and writes these intervals using the forecast values and dates.
5. Using the service metric type and shrinkage values from the forecast defaults setup, automatically generates staffing requirements forecast using all available forecasting algorithms for the newly created intervals.
6. Automatically publishes the new staffing requirements forecast intervals to the derived date range.

This process runs at a user-defined day of week and time and repeats every week, ensuring that the published forecast remains some number of weeks ahead of the current date.

Configuration Element	Description	Enterprise	Essentials
Forecast profiles	Define flexible ways of acquiring data used in forecasting algorithms.		
Working forecasts	Allows creating isolated, what-if forecasts made up of contact volume, service objective, shrinkage, and staffing forecast intervals.		
Published forecast	Allows creating a continuous timeline of forecast intervals. Limited to staffing requirements.		



Configuration Element	Description	Enterprise	Essentials
Staffing worksheet	Provides a simple interface for testing staffing requirements based on user supplied volume and service level values.		

In Essentials, there is no option for choosing “Select a working forecast” from the following pages:



- Adherence report options pages
- Intraday performance reports
- Schedule analytics pages
- Published schedule worksheet
- Published schedule reports
- Working schedule forecast selection

Forecast profiles







Forecast profiles are included in Essentials, but without the full complement of profile types and forecast components supported in the Enterprise edition.

Forecast components









Essentials does not support time-of-day/day-of-week forecasts for service metrics or shrinkage percentages. The forecasting algorithm defaults to the values retrieved from the forecast defaults for the selected activity when generating a forecast (or auto-forecasting).

Forecast component	Description	Enterprise	Essentials
Contact Volume & Handle Time	Allows setting up a forecast profile that retrieves contact volume and handle time history for forecasting.		







Forecast component	Description	Enterprise	Essentials
Service Objectives	Allows setting up a forecast profile that retrieves data for time-of-day / day-of-week service objective forecasting.		
Shrinkage percentages	Allows setting up a forecast profile that retrieves data for time-of-day / day-of-week shrinkage values (discretionary and non-discretionary).		
Staffing Requirements	Allows setting up a forecast profile that retrieves data for staffing requirements forecasting.		

Forecast Profile Types





Forecast profile type	Description	Enterprise	Essentials
Dynamic profile	Defines a fixed window of prior weeks of volume history to use for forecasting.		
Static profile	Defines specific weeks in history to use for forecasting.		
Date range profile	Defines a to / from date range of volume history to use for forecasting.		
Excel data profile	Allows importing an Excel workbook and using that data for forecasting.		



Forecast profile type	Description	Enterprise	Essentials
Manual data entry	Allows using manually entered time-of-day / day-of-week forecasted volume data.		
Static profile from special days	Defines a static forecast profile based on the instances of calendar special days.		

Forecast methods





Essentials supports only one forecast method.

Forecast method	Description	Enterprise	Essentials
Classic community forecasting	Uses a simple averaging algorithm to create future intervals.		
Weekly weighted average	Allows weighing the included weeks of forecast source data and generating weighted future intervals.		





Published forecast

Report

The report option allows reporting the details by a selected forecast component.

Report option	Description	Enterprise	Essentials
Contact volume	Defines the CV and AHT per contact for a single forecast interval.		
Service targets	Defines the target service metric type.		











Report option	Description	Enterprise	Essentials
Shrinkage percentages	Discretionary and non-discretionary shrinkage values.		
Staffing requirements	Number of agents required to satisfy the CV to achieve the service objective for the interval.		

Revise

Essentials supports the ability to modify the published forecast directly, without the need to first modify and publish a working forecast. Revision options are the same in Essentials and Enterprise including by specific daily interval, daily totals, weekly totals, monthly totals, and showing revision history.

Schedule

Unlike forecasting, Essentials includes the Working Schedule > Published Schedule workflow. Essentials does not include the Schedule Bid and ASAP functions.

















Configuration Element	Description	Enterprise	Essentials
Working schedules	Define a one-week container for a what-if or scratchpad schedule.		
Schedule bids	Create bid containers allowing agents to rank from an inventory of schedules.		
Published schedule	Contains the continuous schedules for agents.		
ASAP Calendar	Shows current ASAP plans in a calendar view and allows creating new plans or copying existing plans.		




Working schedule list

The working schedule list is the same for Essentials and Enterprise. Create new schedules, copy existing schedules, and the advanced sort and filter options are valid for both Essentials and Enterprise Editions.























Working schedule worksheet

Feature	Description	Enterprise	Essentials
Basic properties	Includes name, description as well as schedule metrics.		
Select schedule participants	Allows manually choosing participants in a working schedule.		
Custom work habits & hours	Allows overriding the default hours of operation for a non-standard work week.		
Review events and exceptions	Allows one final opportunity to approve or deny time off requests.		
Select forecast data	Allows specifying the source of forecast data used for schedule optimization.		
Generate optimized schedules	Performs the schedule generation task.		
Manage agent schedules	Reports the current schedule by the default schedule activity.		
Archive this schedule	Removes the schedule from the list of working schedules.		













Feature	Description	Enterprise	Essentials
Publish this schedule	Makes the schedules contained in the working schedule visible to agents.		
Copy this schedule	Copies all schedule information, including forecast selections and participants, to another schedule week.		
Security	Allows administrators to secure the access to the working schedule.		
Interactive schedule reports			
Agent schedules by Activity	Shows agent schedule by selecting from the activity tree.		
Weekly schedules by Activity	Displays agent schedules for the entire week by choosing an activity.		
Agent schedules by supervisor	Displays agent schedules by choosing from the supervisor org chart.		
Agent schedules by user group	Displays agent schedules by choosing a custom user group.		
Unassigned participant report	Displays schedule participants that have no current schedule template assigned.		
Schedule analysis & summary reports			
Schedule analysis	Shows potential vulnerabilities in the schedule by providing a staff overage / shortage as compared to the selected forecast.		







Feature	Description	Enterprise	Essentials
Schedule analysis – weekly view			
Full-service metric summary	Displays the service metric report given the current schedule.		
Compact service metric summary	Same as full view but in a more concise display format.		
Schedule event summary	Shows a breakdown of time spent in each event type found in the schedule.		
Net staffing hours	Shows the net hours at work for each day of the schedule.		
Daily paid time	Shows the paid hours for each day of the schedule.		
Weekly days off	Shows the days off for all agents for each day of the week.		
Working schedule shrinkage	Shows hours of discretionary and nondiscretionary shrinkage by interval.		
Printer-friendly schedule reports			
Schedule summary	Shows a printer friendly version of the schedule.		
Layered schedule summary	Shows a printer friendly version of the schedule with each schedule event displayed.		
Schedule detail by date	Shows the entire schedule in a printer friendly format.		



Feature	Description	Enterprise	Essentials
Schedule detail by participant	Shows the entire schedule in a printer friendly format with page breaks for each agent.		
Utility schedule reports			
Participant availability & preferences	Shows the availability pattern for each agent for the schedule week.		
Effective schedule assignments	Shows the effective schedule assignment for the schedule week.		
Assignment profile assignments	Shows the schedule template assignment for the selected schedule assignment profile.		
Schedule generation results	Shows the per-agent schedule generation results (from the optimization process).		

Published schedule worksheet











The published schedule worksheet is the same for Essentials and Enterprise. However, the schedule analytics “Display options” page will restrict the forecast selection to only the published forecast, and the forecast algorithm selection to only the default staffing forecast algorithm.

Report	Description	Enterprise	Essentials
Agent schedule by activity	Shows agent schedule by selecting from the activity tree.		
Agent schedules by supervisor	Displays agent schedules by choosing from the supervisor org chart.		



Report	Description	Enterprise	Essentials
Agent schedules by user group	Displays agent schedules by choosing a custom user group.		
Schedule analysis & summary reports			
Full-service metric summary	Displays the service metric report given the current schedule.		
Compact service metric summary	Same as full view but in a more concise display format.		
Schedule analysis	Shows potential vulnerabilities in the schedule by providing a staff overage / shortage as compared to the selected forecast.		
Schedule analysis weekly view			
Schedule event summary	Shows a breakdown of time spent in each event type found in the schedule.		
Net staffing hours	Shows the net hours at work for each day of the schedule.		
Daily paid time	Shows the paid hours for each day of the schedule.		
Weekly days off	Shows the days off for all agents for each day of the week.		
Published schedule shrinkage report	Shows hours of discretionary and nondiscretionary shrinkage by interval.		
Printer-friendly schedule reports			





Report	Description	Enterprise	Essentials
Schedule summary report	Shows a printer friendly version of the schedule.		
Layered schedule summary	Shows a printer friendly version of the schedule with each schedule event displayed.		
Schedule detail by date	Shows the entire schedule in a printer friendly format.		
Schedule detail by participant	Shows the entire schedule in a printer friendly format with page breaks for each agent.		
Utility schedule reports			
Published schedule audit	Shows events on the published schedule and includes option to 'unpublish' the schedule.		

AI Forecast



Automated AI forecasts allows creating and maintaining automated forecasts using machine learning and historical contact volume & handle time. This feature is not available in Essentials.

Report













The reports menu item includes the most common reports from other functional areas of the application.

Report	Description	Enterprise	Essentials
Contact volume			
Enterprise Model	Shows contact volume history by first choosing a site or activity.		









Report	Description	Enterprise	Essentials
Data source	Shows contact volume history by first choosing a data collection source.		
Published forecast			
Contact volume & handle time	Shows the current published forecast restricted to contact volume and handle time reports.		
Service targets	Shows the current published forecast restricted to service target reports.		
Shrinkage percentages	Shows the current published forecast restricted to shrinkage percentage reports.		
Staffing requirements	Shows the current published forecast restricted to staffing requirements reports.		
Published schedule			
Schedule details	Shows the published schedule for a date range by choosing a site or activity, supervisor tree, or custom user group.		 Custom user group is not available
Schedule analysis	Shows the staffing variance and resulting service grade projection from the published schedule.		
Schedule summary (printer)	Shows the published schedule using a summary format for a date by choosing a site or activity.		













Report	Description	Enterprise	Essentials
Schedule details (printer)	Shows the published schedule details for a date by choosing a site or activity.		
Shrinkage report			
Published event summary	Report hours by event type and interval using a variety of summary options.		
Intraday analysis			
Intraday performance monitor	Contrasts forecast vs. actual contacts, staffing variances and projected variances in volume, staffing and service grade by choosing a site or activity.		
Schedule analytics	Provides a comprehensive analysis of the current and forward-looking situation as it relates to staffing.		
Schedule adherence			
Daily schedule adherence	Shows schedule adherence for a date by choosing agents from a site or activity, supervisor group, or custom user group.		 Custom user group is not available
Adherence alerts	Shows the current state of adherence for a group of agents selected by choosing a site or activity, supervisor group, or custom user group.		 Custom user group is not available







Report	Description	Enterprise	Essentials
Schedule adherence history	Shows historical schedule adherence over a date range for agents selected by choosing a site or activity, supervisor group, or custom user group.		 Custom user group is not available
Schedule adherence summary	Shows summary of adherence data over a date range for agents selected by choosing a site or activity, supervisor group, or custom user group.		 Custom user group is not available
Device state detail report	Shows individual phone state transactions for agents selected by choosing a site or activity, supervisor group, or custom user group.		 Custom user group is not available
Daily paid time	Shows the daily paid time based on actual phone states over a week interval for agents selected by choosing a site or activity, supervisor group, or custom user group.		 Custom user group is not available
Schedule adherence comparison	Compare up to five 'scopes' using the adherence summary data		
Administrative & utility			
Application exceptions	Shows the list of application exceptions.		
Data source logins	Shows the list of agents and their default logins for each data collection source.		







Report	Description	Enterprise	Essentials
Database health and statistics	Shows job status and database table sizes.		 Data retention policies not customizable
Event review status change	Shows the review status of outstanding time off events.		
Change audit log	Shows the list of changes to various system resources grouped by functional area.		
Data targets	Allow establishing unattended report runs that output to local or remote flat files.		
User logon report	Shows current (active) logged on users to the system.		















Change audit log

Audit report types	Description	Enterprise	Essentials
Application	Generic application events including schedule changes, enterprise model, agent profiles, data sources, etc.		
Auto Approve	Reports modifications to the auto approve rules.		











Audit report types	Description	Enterprise	Essentials
PTO application	Reports modifications specifically related to All Things Time Off.		 Only Time off rules
Security	Reports modifications specifically related to security provisions, including data subject rights.		

Further, the following table defines the availability of specific audit reporting areas.

Audit report sources	Description	Enterprise	Essentials
Agent image	Shows changes to agent images.		
Agent Profiles	Shows changes to agent profile or subordinate settings.		
Collection points	Shows changes made to collection points, including properties, bulk-revisions, and interval-based revisions.		
Community Group Member	Shows changes made to members of a custom user group.		
Data Sources	Shows changes made to data sources.		
Enterprise Model	Shows changes made to the Enterprise Model.		
Recurring events	Shows changes made to recurring events, including PTO requests.		












Audit report sources	Description	Enterprise	Essentials
Schedule event	Shows changes made to published schedule events.		
Self Service Validation Plan	Shows changes to the self-service validation plans		
Time off requests	Reports changes to time off requests.		
Time zone configuration	Reports changes to the configured set of time zone definitions.		

Help



Essentials features a selection of the help videos.

For Agents

















Welcome to your Community

Video title	Description	Enterprise	Essentials
Navigating in 5.0	Explore the new ways to navigate the WFM application in 5.0.		
Understanding the homepage modules	Overview of the modules available for the homepage.		
Personalizing your homepage	How to add modules to your homepage and select a theme.		
Configuring devices	How to set up external communication devices, such as a cell phone and email.		
Reminders and notifications	How to manage pop-ups and notifications.		



















Video title	Description	Enterprise	Essentials
Data Privacy - Agent	How to review and request data subject access requests		

Managing your schedule

Video title	Description	Enterprise	Essentials
Viewing your schedules	How to view your weekly published schedule.		
Viewing schedule adherence	How to view your schedule adherence statistics.		
Modifying schedule preferences	How to designate your schedule preferences.		
Modifying schedule availability	How to designate your schedule availability.		
Submitting a schedule bid	How to submit a bid for an available schedule.		
Request a schedule transaction	How to request a schedule swap.		
Respond to a schedule transaction	How to respond to an available schedule swap request.		
Agent self-service kiosk (ASSK)	How to request an ASSK event		


Managing your planned time off

Video title	Description	Enterprise	Essentials
Requesting time off - which method applies to me?	How to determine your designated time off rule - legacy rules or calendar partition rules.		
Viewing your time off	How to view the status of your time off requests.		
Requesting planned time off - legacy rules	How to request time off under legacy rules.		
Requesting recurring time off - legacy rules	How to request recurring time off events under legacy rules.		
Participating in a time off bid round	How to make a time off request in a bid round under calendar partition rules.		
Requesting time off in open selection	How to make a time off request in an open selection calendar under calendar partition rules.		
Using the waitlist	How to use the waiting list under calendar partition rules.		
Requesting a bid round exception	How to request an exception to a calendar partition rule in a bid round.		











For Analysts and Schedulers

Forecasts and schedules









Video title	Description	Enterprise	Essentials
Creating forecast profiles	How to create working forecast profiles.		
Creating a working forecast	How to create a working forecast.		
Editing a working forecast	How to make changes to an existing working forecast.		
Analyzing history for forecasting	How to select historical data for use in forecasting future contact volumes.		
Configuring break sets	How to create and edit break sets.		
Configuring schedule templates	How to create and edit schedule templates.		
Creating and publishing working schedules	How to create and publish a working schedule.		
Editing schedules	How to edit an existing published schedule.		
Published schedule reports	How to run various published schedule reports.		
Approve schedule transactions	How to review and approve schedule transactions.		













Video title	Description	Enterprise	Essentials
Translations	How to change the language preference		
Data privacy - Admin	How to manage DSARs		
Agent Self-Service Kiosk	How to manage ASSK events		
Adherence comparison report	How to select scopes and run the report		

Advanced vacation





Essentials does not include any of the advanced vacation features.

Video title	Description	Enterprise	Essentials
Creating PTO accrual schedules	How to create time off accrual schedules for PTO.		
Importing PTO accruals with Excel	How to import time off accruals for PTO using an Excel worksheet.		
Creating PTO Classifications	How to create and configure PTO classifications to use in policies for managing PTO.		
Creating a PTO Policy	How to create a PTO policy with accrual rates and rules to assign to agents and use with calendar partitions.		



Video title	Description	Enterprise	Essentials
Creating PTO calendar partitions - open selection	How to create and configure a PTO calendar to use for open selection.		
Creating PTO calendar partitions - bid rounds	How to create and configure a PTO calendar to use for a bid round.		
Managing PTO bid rounds	How to set up and manage a bid round in a PTO calendar partition.		
Managing bid round exception requests	How to review and manage participant requests for exceptions to rules in a bid round.		
Copying PTO Calendars	How to use the Copy Calendar Wizard to copy a PTO calendar to a new date range, or replicate a PTO calendar for a new group of participants.		

















Agent Interface

Feature	Description	Enterprise	Essentials
Today	The main application "home" page.		
Plan			
Time off worksheet	Overview includes time off requests, upcoming PTO, and PTO policy and		 Includes only general settings













Feature	Description	Enterprise	Essentials
	calendar settings, and restricted action plans.		
Request planned time off	Allows agents to request time off events.		
Request recurring time off event	Allows agents to request recurring time off events.		
Schedule			
Published Schedule	Allows agents to review their published schedule.		
Schedule Availability	Allows agents to review and adjust their schedule availability.		
Start time preferences	Allows agents to review and adjust their start time preferences.		
Schedule day preferences	Allows agents to indicate preferred workdays off and on.		
Schedule template assignments	Allows agents to review and request schedule template assignments.		
Schedule Transactions	Allows agents to review their individual schedule transactions as well as initiate new schedule transaction requests.		



Feature	Description	Enterprise	Essentials
Schedules for your supervisor group	Allows agents to view the schedules of other agents that share a supervisor (if permitted).		
Self-check-in	Allows agents to do a manual self-check-in to the schedule attendance monitor.		
ASAP Calendar	Allows agents to view any ASAP plans that they participate in.		
Schedule bids	View a list of current schedule bids.		
Properties			
Properties	Allows agents to view the details of their profile page. Also allows agents to modify their login password.		 Custom profile properties not available
Configure devices	Allows agents to configure external devices (phones, email addresses, etc.) for notifications and set up the mobile app.		 includes only set up for mobile app
Profile pictures	View current and available profile pictures.		
Report			
<i>Published schedule</i>			
Published event summary	View scheduled hours with a variety of report criteria.		



Feature	Description	Enterprise	Essentials
Schedule summary (printer)	Allows agents to view their published schedule in a printer friendly format.		
Schedule details (printer)	Allows agents to view the detailed published schedule view in a printer friendly format.		
<i>Schedule adherence</i>			
Schedule adherence summary - Agent	Allows agents to view their individual adherence summary.		
Daily schedule adherence	Allows agents to view their individual adherence report for any date range.		
Device state detail report	Allows agents to view their individual phone state transactions used to derive schedule adherence reports.		



Migrating between product editions

Migrating between the product editions should be as easy as navigating to the “Activate your software” page and entering the new values for the license key and activation code.

	To Essentials Edition	To Enterprise
From Essentials Edition	Will “Refresh” the available feature set according to the rules for Essentials Edition and the new activation attributes.	Will expose the new features of the application and eliminate the restrictions imposed by Essentials (agent counts, data source counts, etc.).
From Enterprise Edition	Will expose the features of the Enterprise edition. Note that the restrictions must apply (agent counts, data source counts, etc.) or the application will reject the activation code.	Will “Refresh” the available feature set and activation attributes according to the rules of the Enterprise Edition. This would be nearly the same as the activation page currently functions.