



CommunityWFM 5.0

Quick Start Guide

CommunityWFM Version 5.0+
Version 1.0
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Before upgrading CommunityWFM 5.0

Prior to installation, your project manager will discuss a transition plan. This will include

- Access to your system (if applicable)
- System readiness as per new documented system specifications.
- Notification channels in use
- Timing of cutover to 5.0

Reminders

Excel profiles data will not transfer

If you use Excel profiles for working forecasts, the data from those profiles **will no longer be available** in CommunityWFM 5.0. You will need to re-create the profiles even though it looks like they're still there. There is no data in the tables.

Browser – IE is not supported

Internet Explorer is no longer supported and will not work with CommunityWFM 5.0. Microsoft Edge is the preferred browser.

Cache Flushing

Plan to flush your browser cache prior to starting with the new CommunityWFM. This will improve your 5.0 experience.

Mobile App

If you use Community Everywhere, encourage everyone to update to the newest version of the mobile app from the Apple App Store or Google Play.

Advanced Vacation

CommunityWFM 5.0 introduces a new time off request method for agents that aligns with the introduction of the advanced vacation module. If desired, agents will still be able to request time off using legacy mode without the advanced vacation enhancements. See *Time Off – A Guide for Agents* for complete information.



Auto-approve service

Rules must be enabled for the auto-approve service to validate agent requests with both the legacy system and the new calendar partition.

- If using **calendar partition rules**, the *Agent Accrued Hours Rule* will be turned on by default.
- In the **legacy auto-approve** rules source, the *Agent Accrued Hours Rule* is turned off by default.

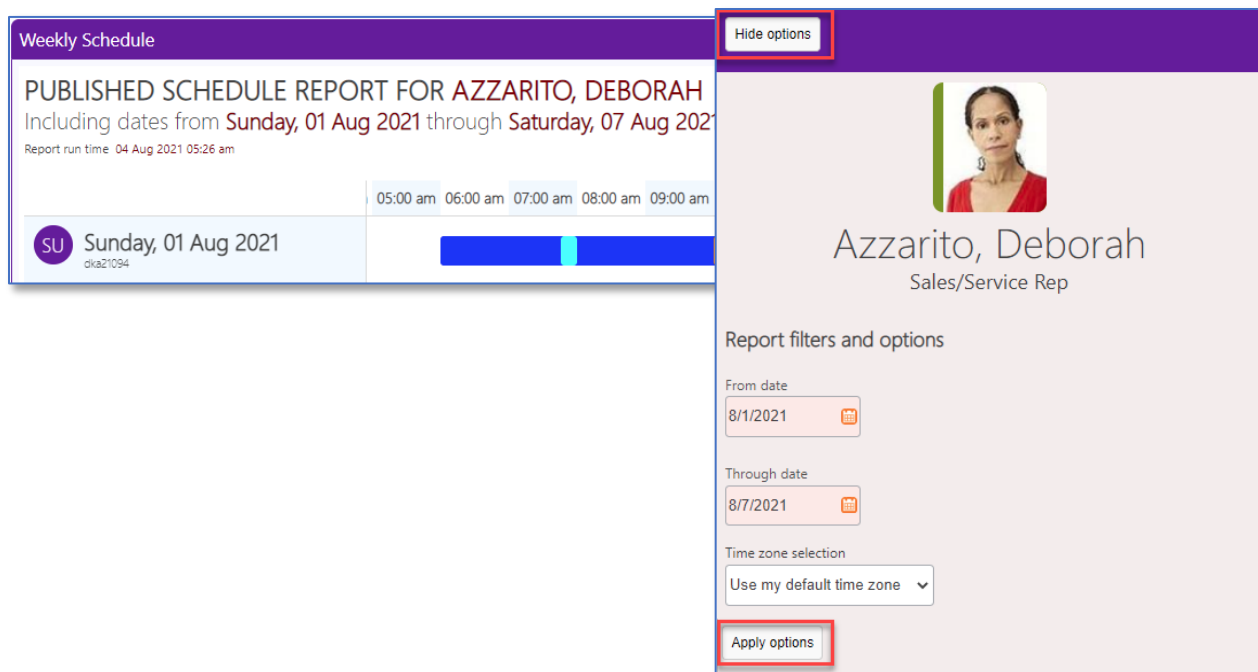
If using accruals in CommunityWFM — whether the native accrual system or uploading from an outside source — turn on the *Agent Accrued Hours Rule* if you want the auto-approve service to validate agent time off requests against their accrued time when the request is submitted using the legacy (Plan > Time off requests) instead of the new Time off worksheet.

Navigation tips new for 5.0

5.0

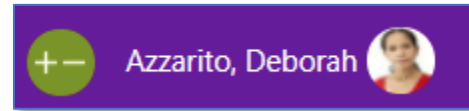
Show / Hide options

On some pages there is a new *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. To close the menu click *Hide options* at the top of the window.

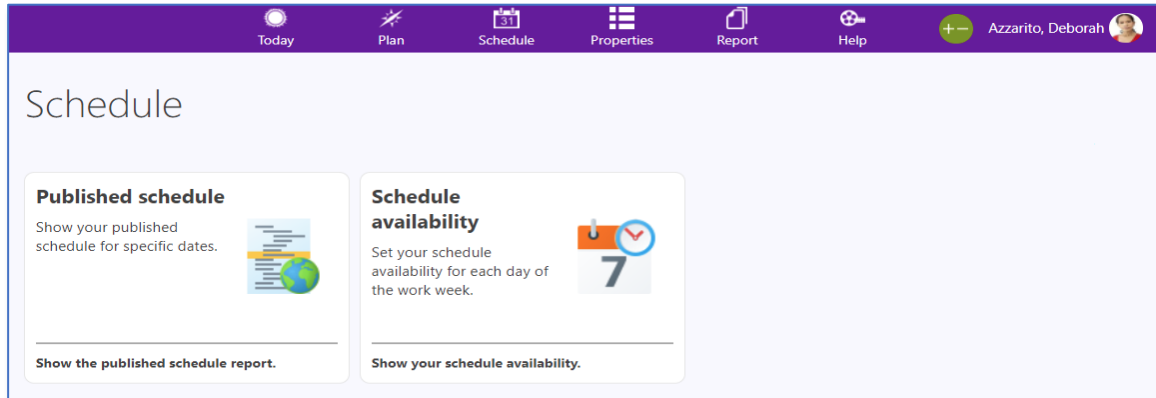


Expand / Collapse Tiles

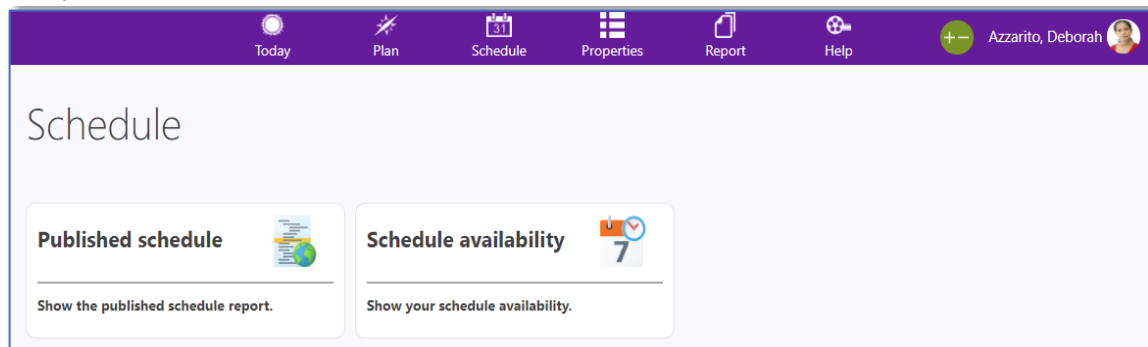
Next to your name is a green +/- button. Click this to expand or collapse the tiles on the page. Once selected, the settings will hold for all pages until you click the +/- button again.



Expanded

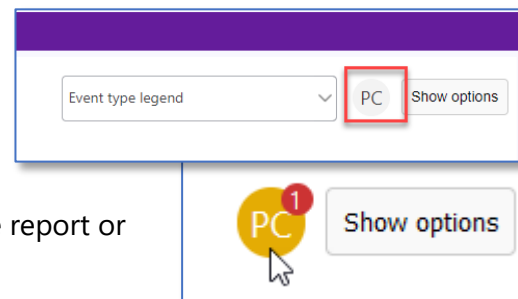


Collapsed



Pending changes

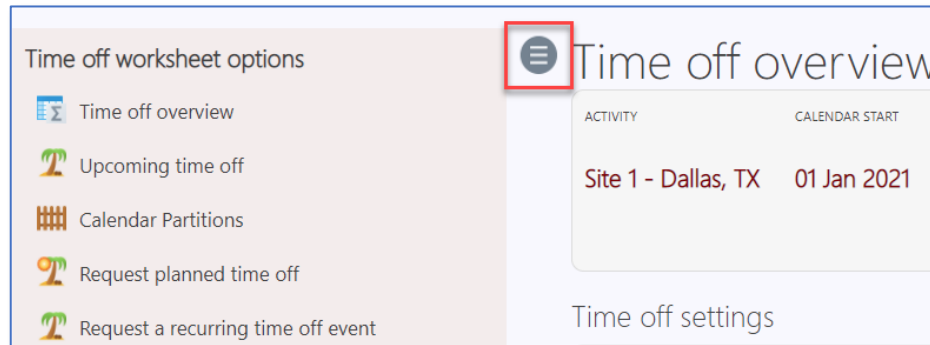
At the top of some pages you may see a small circle with PC (=pending changes). If the icon turns orange and has a red number, this means there is a pending change for the page. The red number indicates the number of pending changes. Rerun the report or refresh the page to see the changes.





Left side navigation pane open and close.

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



New Desktop Themes

Ready for a new outfit to go with your upgrade? There are new colors available in desktop themes. Click on your name and visit *Personalize your desktop* to explore the new options.

Agent Profile Pictures

Using the Community Everywhere App, agents can snap a selfie to use as their profile picture (after supervisor/administrator approval). In the app, go to Help/About and click on the *Edit* icon under the picture.

Calendar Integration

Agents can export an iCal link to their personal Outlook or Google calendar from CommunityWFM to see schedules and events. Visit Properties > Devices and *Copy iCal Link*.

Adherence Summary

In order to view the new adherence summary data, you first need to run the Data Summary Utility. To run this, go to Settings > Application Settings > Administrative Settings > Data Summary Utility. Enter a date range for up to 90 days then click *Generate summary results*. Also, make sure the Schedule Adherence Summary Service is enabled. The colors correspond to the adherence percentage: red < 65%; orange 65–74%; yellow 75–89%; green > 90%.



Agent Adherence Summary

Agents now have their own adherence dashboard, which they can add to their home page to see summary data for yesterday, weekly (running 7-day total), and monthly (first of month through today) adherence scores. They also have a new Agent Schedule Adherence Summary report.

Where can I find...?

While the menu structure is basically the same, some items have moved.

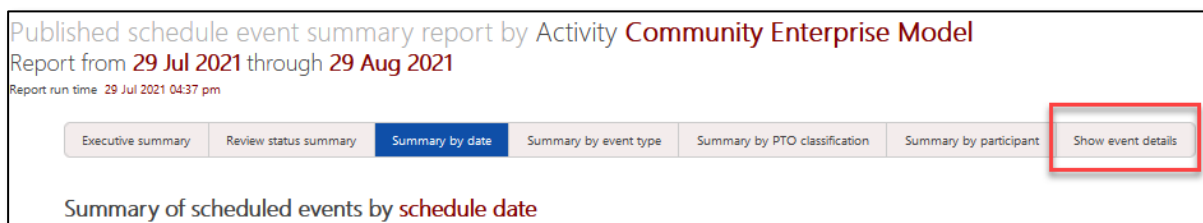
Time Off Events (Event detail report)

In previous versions of CommunityWFM, the Event Detail Report provided a place to filter for time off requests and approve, deny, or change to pending current time off requests. CommunityWFM 5.0 combines the detailed and summary reports, enabling better performance and efficiency.

To reach this report go to Plan > All things time off > Time off reports. This will limit the report to time off events.

Alternatively, go to Report > Published schedule > Published event summary > select activity.

1. Depending on which report you're running, filter it for site, supervisor, or custom user group.
2. Enter your date range.
3. Click *Apply options* at the bottom.
4. Click the filter at the top of the report *Show event details*.



This is similar to previous versions of time off requests, with the addition of the validate button.

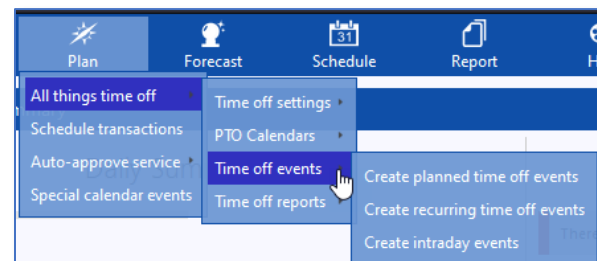
Participant	Event type	Event from	Event through	Start time	End time	Total hours	Event hours	Review status	Description (comments)	Created on	
Florez, Oscar	PTO	02 Aug 2021	06 Aug 2021	N/A	N/A	40.00	8.00	Denied	PTO	29 Jul 2021 02:27 pm	    
Duncan, Matthew	PTO	03 Aug 2021	03 Aug 2021	08:00 am	04:00 pm	8.00	8.00	Approved	PTO Again	29 Jul 2021 02:28 pm	    
Dyer, Amanda	PTO	03 Aug 2021	03 Aug 2021	08:00 am	04:00 pm	8.00	8.00	Approved	PTO Again	29 Jul 2021 02:28 pm	    
Finn, Mike	PTO	03 Aug 2021	03 Aug 2021	08:00 am	04:00 pm	8.00	8.00	Pending	PTO Again	29 Jul 2021 02:28 pm	    

Adding time off for agents

In 4.4, the menu path was Plan > Time off requests> New event.

In 5.0, go to Plan > All things time off > Time off events and the options have changed. Now you can *Create planned time off events*, *Create recurring time off events*, or *Create intraday events*.

Planned time off events: Refers to partial day, single day, or multi-day events, validated in real time against designated rules and may be approved or denied by the rules engine. There is an option to approve all days together or independently – approving some days and not others. Available event types differ by role, with agents seeing only events that require supervisor approval.



Recurring time off events: Refers to single or multi-day events, with designated start and end time, with possible long date range, and a recurrence pattern of daily or specified days of the week. Events of this type are not evaluated by the rules engine in real time, and you are not able to specify whether to approve all days together or independently. Available event types differ by role, with agents seeing only events that require supervisor approval. These events might include leaves of absence, military service, etc.

Intraday events: For a single day event and with no recurrence pattern, e.g., and ad hoc meeting or an agent is out sick.