



# Community 5x

# Reporting Guide

## Adherence Alerts

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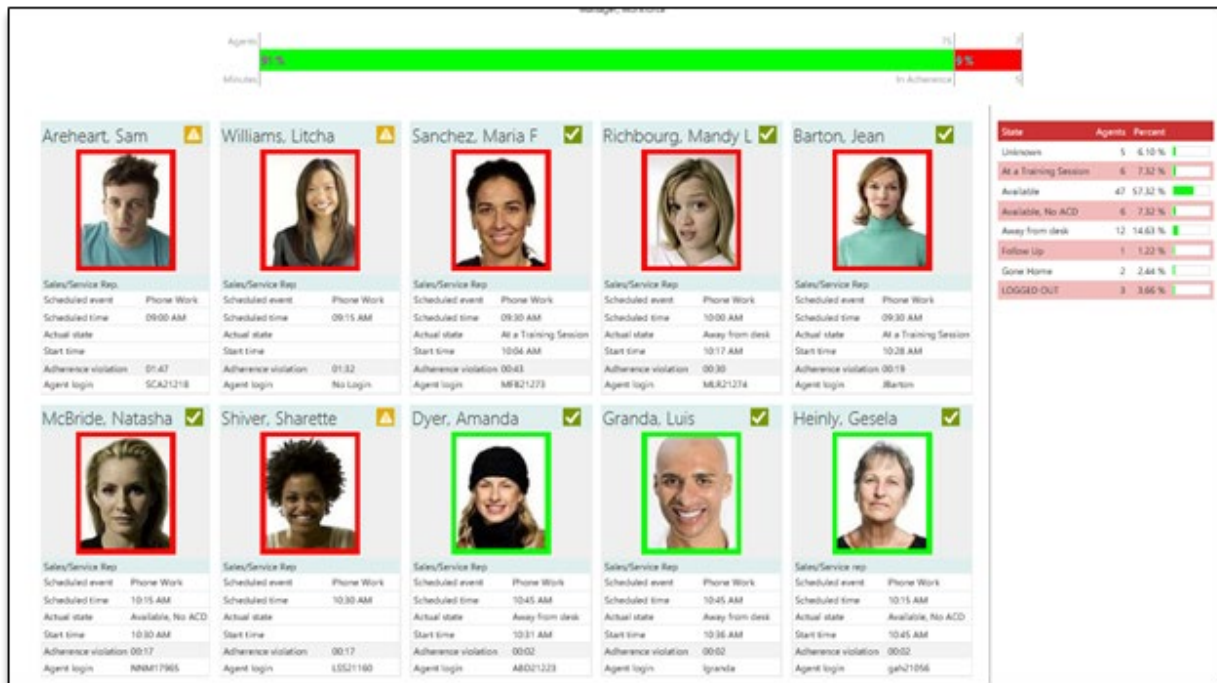
## Adherence Alerts Overview

The Adherence Alerts Report is a valuable tool for monitoring agent adherence in near real-time conditions.

Enterprise Model and Organizational Model versions of the report enable drilling down to the specific agent population you wish to monitor. A variety of reporting parameters make this a user-friendly report for all levels of the operation.

This document reviews the different views and available queries to help you determine the best use of the alerts report in your organization.

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





## Adherence Alerts Report Options

Report > Schedule adherence > Adherence alerts

The Adherence Alerts Report is available at the level of the Enterprise Model (to monitor the entire workforce, Organizational (Supervisor) Model (for managers and supervisors to monitor their teams), or Custom User Group.

Adherence Alerts report options include a wide variety of user parameters to tailor the report for various operational needs.

### Agent adherence alerts report

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

Sort option  
Agent Name ▾

Applies to activity  
Site 1 - Richardson, TX ▾

Employee classification selection  
-- No Selection -- ▾

Data source selection  
-- Default -- ▾

Adherence threshold selection  
Green Yellow Orange Red ▾

Event type selection  
-- No Selection -- ▾

Suppress display of agents who are currently In Adherence

Report refresh interval  
300  
(seconds, blank means do not automatically refresh)

Display type selection  
Show alerts using thumbnail view ▾

Columnsn per row  
4 ▾

Time zone selection  
Use my default time zone ▾

Regenerate report



## Reports option details

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

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

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

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

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

**Event type selection:** Default will show all. You may elect to display only specific work types such as *Work*. This eliminates the display of agents not in adherence when scheduled for off phone events such as breaks and lunch.

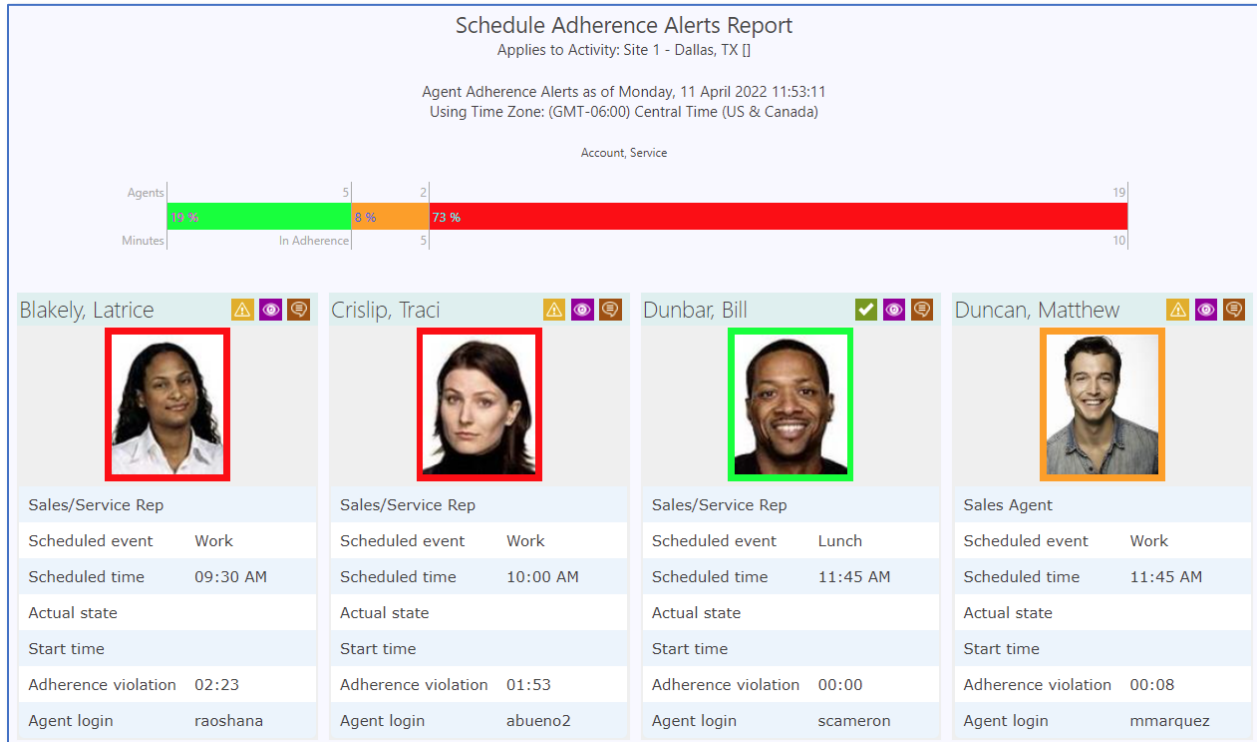
**Suppress display of agents who are currently in Adherence:** Selected by default; only shows agents who are out-of-adherence.

**Report refresh interval:** Default is based on the global setting.

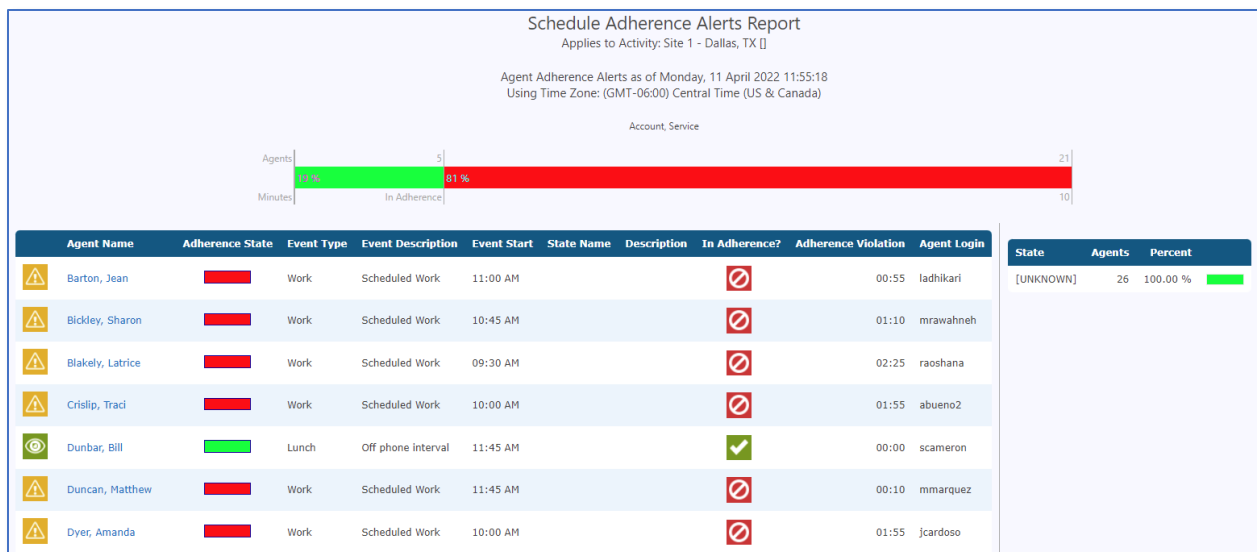
**Display type selection:** Choose between Thumbnail (with agent pictures) or Classic View (a list view).



Thumbnail View Example



Classic View Example





In Adherence?



Represents the agent not in adherence



Represents the agent as in adherence

## Adherence Alert Content

Adherence Alerts reporting includes the following:

- Adherence Summary
- Agent Name
- Links to adherence data, today's adherence transactions, message tool (thumbnail view).
- Agent profile picture from employee profile (thumbnail view)
- Agent title from employee profile (thumbnail view)
- Current scheduled event
- Start time of current scheduled event
- Actual state from ACD
- Actual state start time
- Duration of adherence violation
- Agent Login

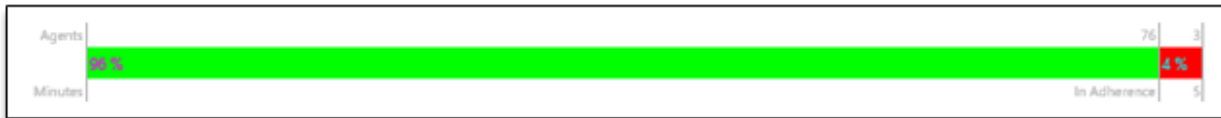




## Adherence and State Summary

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

In this example, the adherence threshold setting is five minutes as noted in the lower right corner of the bar, and there are three out of 80 agents with a current state reporting as out of adherence, which is calculated to be approximately 4% of the current agent count.




Also displayed is a listing of all current agent workstates with the number of agents in each state and the percentage in each state.


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

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





## Examples of Adherence Violations

Bickley, Sharon 





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

Hampton, Stacey R 



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

Cathy, Kelly 



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

## Report Item Definitions

### Check Box and Yield Icons in Thumbnail Alerts



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

A yellow exclamation mark indicates that no workstates are found for an agent. Note there is no Actual State or Start Time for Stacey R Hampton.



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

### Box Outline in Thumbnail reports

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

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



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

### Icons in List Alerts

Reference Number	Agent Name	Adherence State	Event Type	Event Description	Event Start	State Name	In Adherence?	Adherence Violation	Agent Login
162	Hunter, Lapalita		Phone Work	Scheduled Work	09:00 AM			01:07	LAH21227
77	Williams, Litcha		Phone Work	Scheduled Work	09:15 AM			00:52	No Login
43	Dunbar, Bill		Phone Work	Scheduled Work	09:15 AM	Away from desk		00:07	wdunbar
96	Watts, Walter		Phone Work	Scheduled Work	09:00 AM	Away from desk		00:07	WSH17921
63	Nelson, Candice		Phone Work	Scheduled Work	09:45 AM	Away from desk		00:05	cnelson
175	Sanchez, Maria F		Phone Work	Scheduled Work	09:30 AM	At a Training Session		00:03	MF821273
93	Sliche, Carmen		Break	Break 1	10:00 AM	Available		00:01	cm17891
14	Burns, Barbara		Phone Work	Scheduled Work	08:30 AM	Follow Up		00:00	BBurns
126	Sanchez, Mauricio		Break	Break 1	10:00 AM	Available		00:00	MX521011
166	Arhehart, Sam		Phone Work	Scheduled Work	09:00 AM	Available		00:00	SCA21218

The list icons vary slightly from the thumbnail view:



Represents the agent is in an ACD workstate.



Represents the agent not being in any current workstate.



Represents the agent not in adherence.



Represents the agent is in adherence.



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





## Scheduled Event and Scheduled Time

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

Scheduled event	Phone Work
Scheduled time	08:30 AM

A yellow exclamation mark means no work states are found for an agent.

## Actual State and Start Time

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

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

## Adherence Violation

Adherence violation	00:03
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The *Adherence violation* reports the number of hours:minutes the agent has been out of adherence. If less than one minute, the violation will display as 00:00.

## Agent Login

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


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



## Additional Examples

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


**Dunbar, Bill** ✔



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

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

**Williams, Litcha** ⚠




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

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

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

**Rawl, Polly** ✔




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



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

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

Rawl, Polly



Sales/Service Rep

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