What's New in CommunityWFM 5.1

Version 2.0
Includes SP1, HF1, HF2

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About this Document

The objective of this document is to provide an introduction and overview of new system functionality and bug fixes for CommunityWFM version 5.1.

To view the most current version of this document visit our support portal:

What's New? – CommunityWFM (wfmsg.com) (free account required. Sign up with your name and email address)

Overview

CommunityWFM Enterprise 5.1 represents a significant release for CommunityWFM and includes adding support for multiple languages (Spanish for Mexico, Canadian French, and Portuguese for Brazil); additions to aid in compliance with General Data Protection Regulations (GDPR); an Agent Self-Service Kiosk (ASSK); enhanced audit trail reporting; a new adherence comparison report; plus the usual assortment of bug fixes and UI enhancements. This release includes hotfix1 and hotfix2 for 5.0SP3.

Feedback

Your feedback is a significant driver in our enhancements. Onboarding Consultants, the Support Desk, and Product Management can share your comments with the Development team. Keep that feedback coming!

New Features

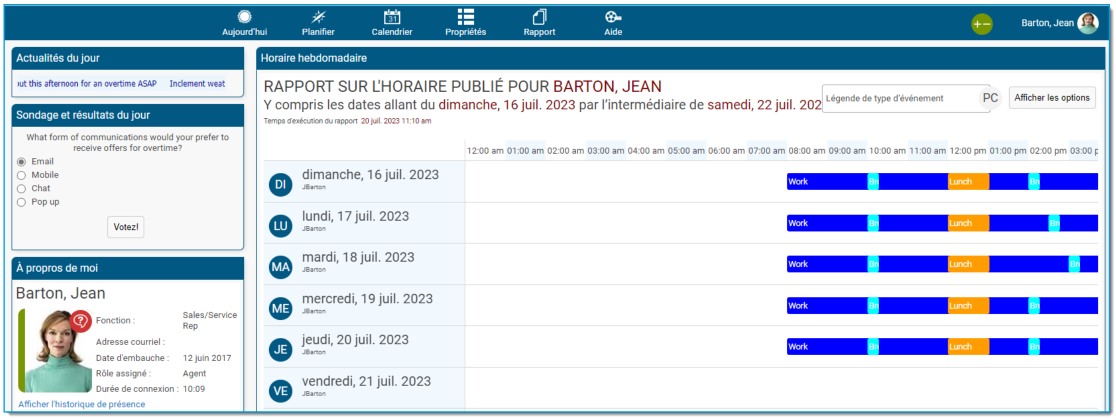
This section includes an overview of the new features in 5.1. Find additional details and instructions for these features in the appendices.

Multi-language support

See Appendix 1 for more details.

¡Hola! Bienvenido a su comunidad.
Bonjour ! Bienvenue dans votre communauté.
Olá! Bem-vindo à sua comunidade

With 5.1 there is an option for multi-language support, which allows viewing the screens in CommunityWFM in French Canadian, Portuguese, or Mexican Spanish. Change the region / language to see reports, pop-up instructions, buttons, and menu items in the preferred language in the web version and the mobile app.



In places where there is client-entered text, it will not be translated (e.g., Hot News, Survey & Results).

Configuring the language setting

An administrator must make the change for the language preference.
Administrators may configure the language for **all** users in the Global settings & preferences (this will change the language of the login page), or for **individual** users in the user's profile. There is also an option to sync the language for multiple users using the Agent Synchronization Wizard.

After changing the language settings, users must log out and log back in for pages to convert to the new selected language.

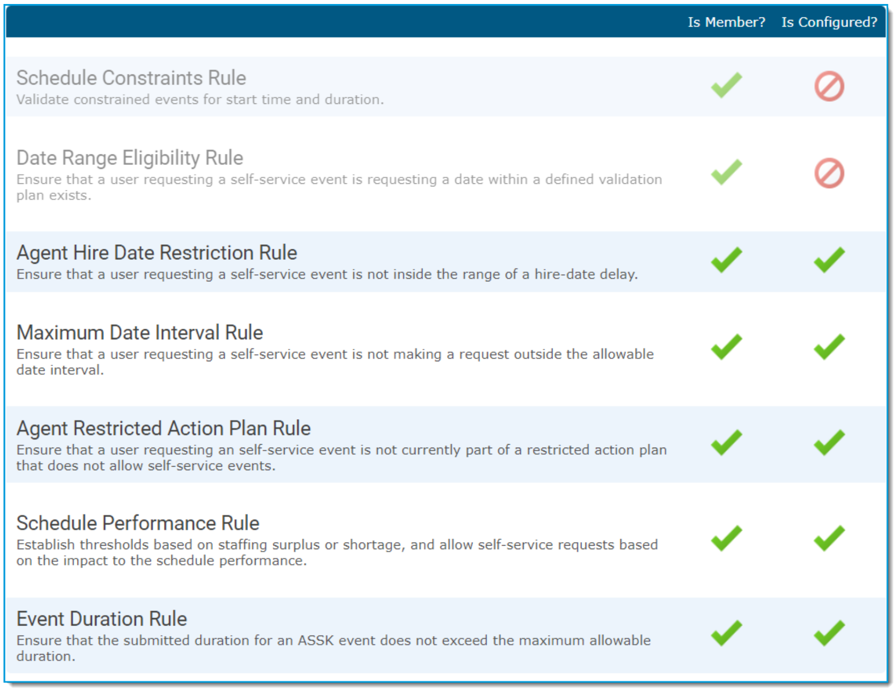
Agent Self-Service Kiosk (ASSK)

See Appendix 2 for more details.

With Community's new ASSK feature, agents can request specifically configured out of queue events and have the event automatically approved and placed on their schedule if it passes the validation rules such as adequate staffing levels. No need for an administrator to approve the request!

Have a mandatory online training module that agents can complete when they're ready? But only if there's enough staff? ASSK is the answer.

Depending on the event configuration, agents may request the designated ASSK event and add it to their schedule in real time, or the configuration can require that the event pass business rules before approval.



	Is Member?	Is Configured?
Schedule Constraints Rule Validate constrained events for start time and duration.	✔	⊘
Date Range Eligibility Rule Ensure that a user requesting a self-service event is requesting a date within a defined validation plan exists.	✔	⊘
Agent Hire Date Restriction Rule Ensure that a user requesting a self-service event is not inside the range of a hire-date delay.	✔	✔
Maximum Date Interval Rule Ensure that a user requesting a self-service event is not making a request outside the allowable date interval.	✔	✔
Agent Restricted Action Plan Rule Ensure that a user requesting an self-service event is not currently part of a restricted action plan that does not allow self-service events.	✔	✔
Schedule Performance Rule Establish thresholds based on staffing surplus or shortage, and allow self-service requests based on the impact to the schedule performance.	✔	✔
Event Duration Rule Ensure that the submitted duration for an ASSK event does not exceed the maximum allowable duration.	✔	✔

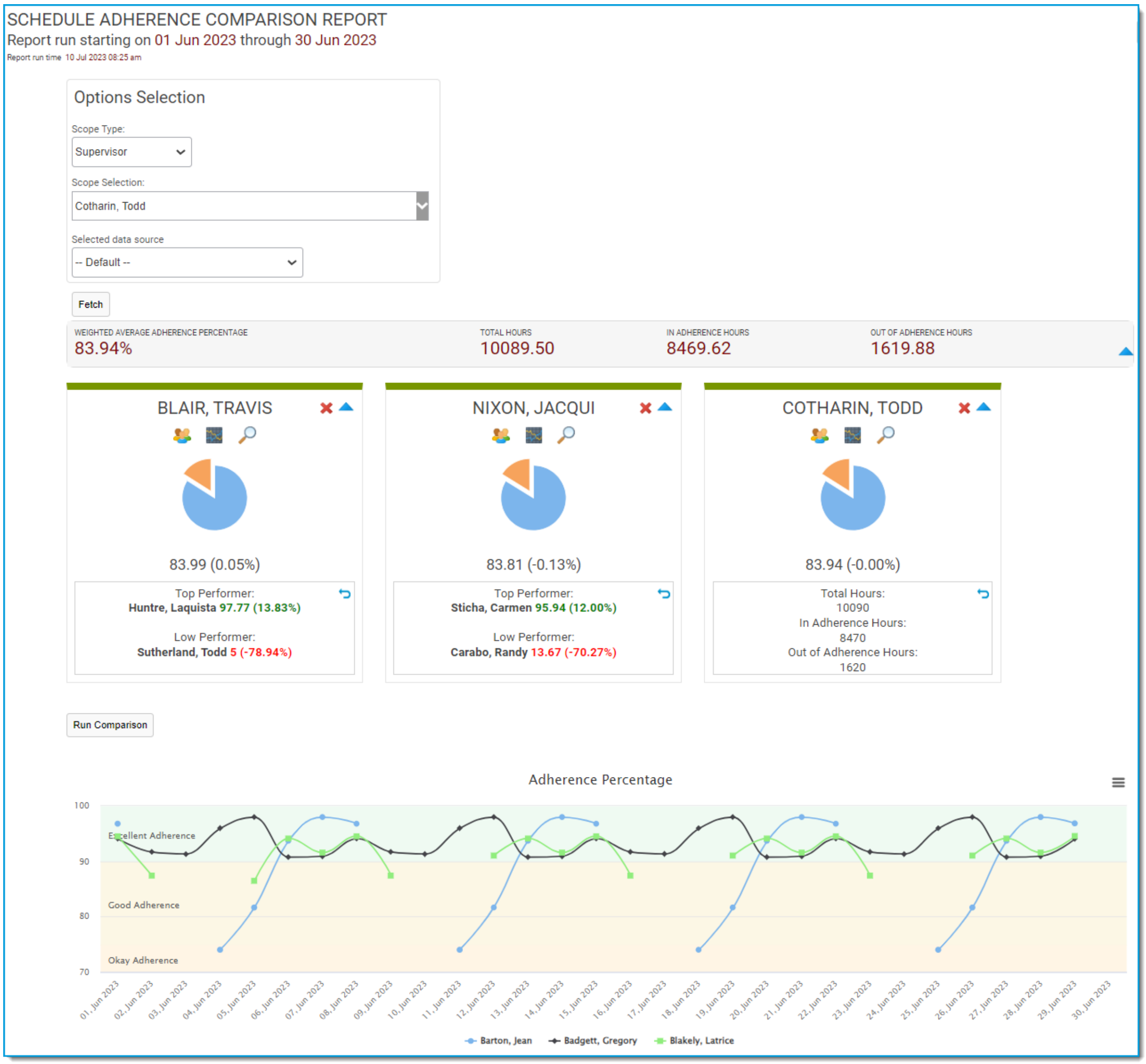
Administrators determine the eligibility of events and configure any applicable business rules, including a Schedule Performance Rule (allowable staffing variance), which run when the agent makes the request.

A memo is sent to the supervisor tree and the agent upon request approval.

Adherence Comparison Report

See Appendix 3 for more details.

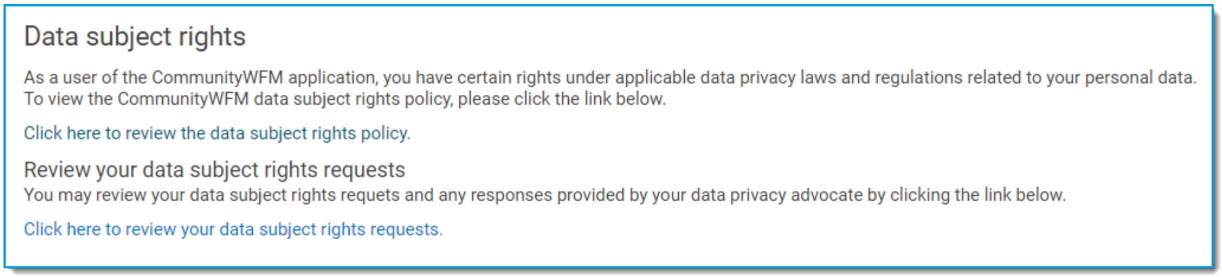
Using the summary adherence data, the comparison report allows selecting up to five people or groups ("scopes") to compare schedule adherence for an unlimited date range. From an executive summary to details, see the top and low performers for each group, total adherence hours and percentages, trends, and the performance of individual agents. As with most reports, this one includes the ability to export the data for further review.



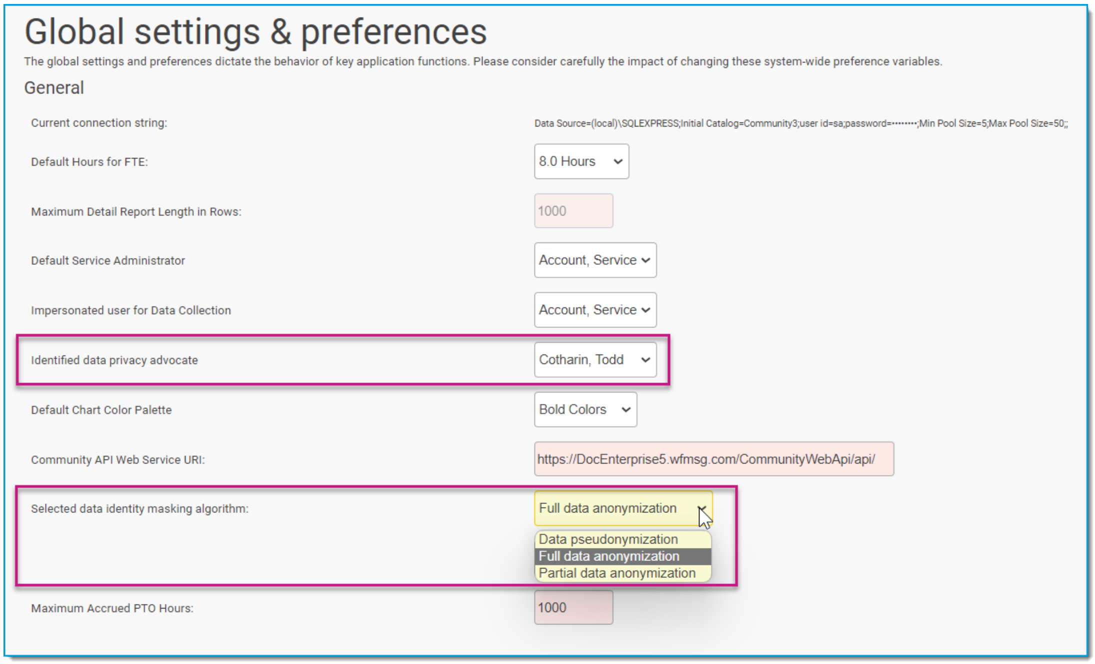
GDPR Support

See Appendix 4 for more details.

General Data Protection Regulations (GDPR) are statutes governing the use and distribution of personal data for users of a website or application. CommunityWFM 5.1 includes a data subject rights policy page with links to allow viewing collected personally identifiable information (PII) and requesting removal, restriction, or correction of PII. Agents may also view a list of their previous data subject rights requests.



Contact centers will need to designate an administrator in the *Global settings & preferences* as a data privacy advocate who can fulfill the data subject access/use requests. There is also an option to select the default data identity masking algorithm:



Note: if you elect to mask a user's data, the masking is not reversible or recoverable and with full anonymization the user profile is locked. Once masked, no one, not even the support desk, can retrieve the PII data.

User interface enhancements

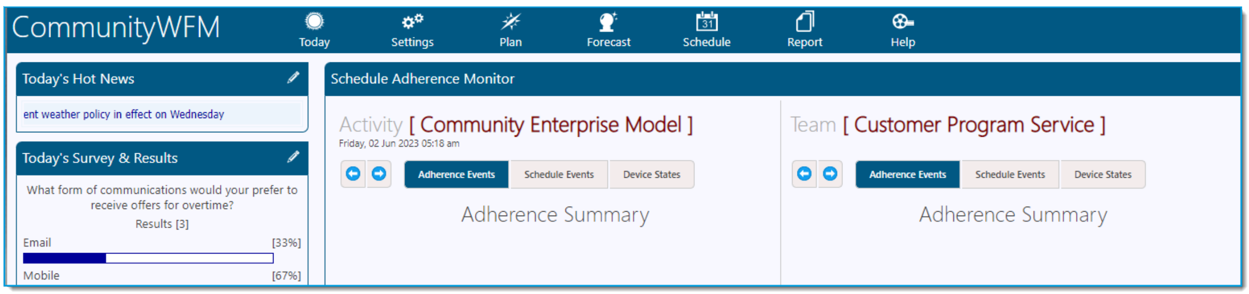
Improved performance

You may notice significant improvements that optimize performance with decreased execution time when generating staffing requirement forecasts, especially for larger centers.

Text styling

There is bolder, cleaner text for easier reading.

5.0



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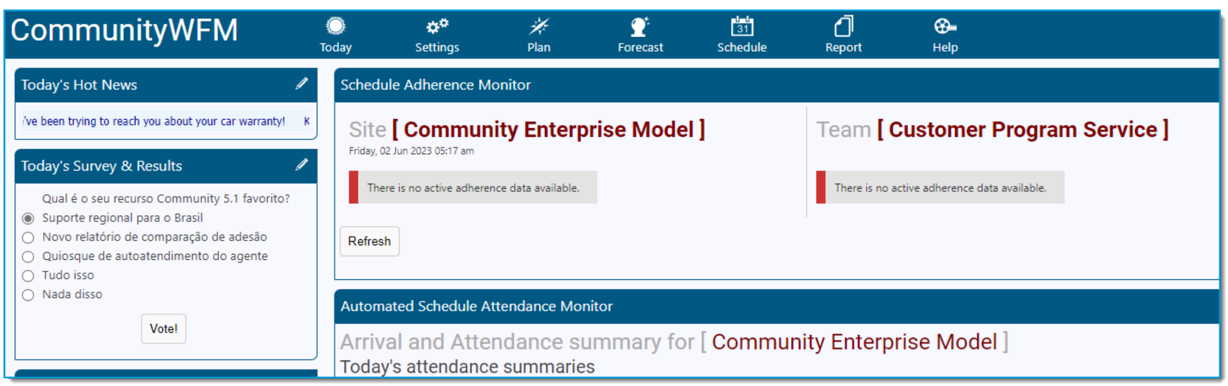
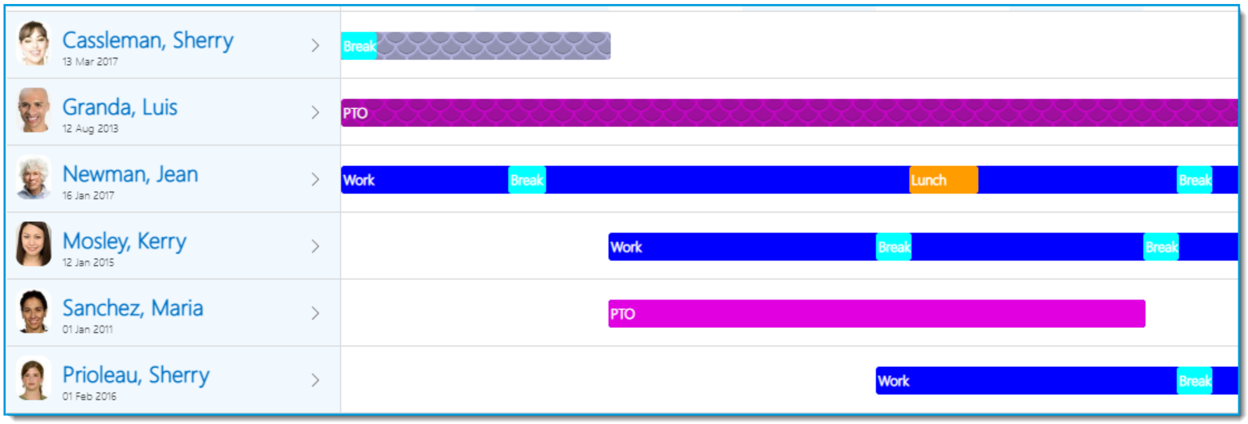


Date format

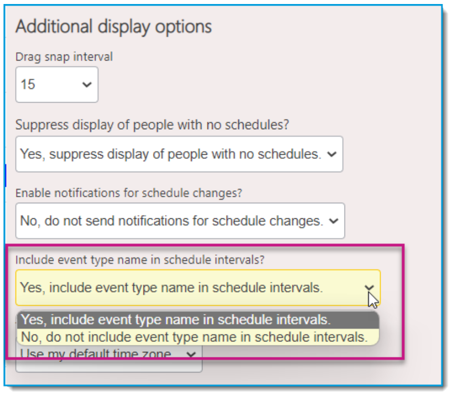
The date format throughout the application is now dd/mon/yyyy (01 Jan 2024) to avoid the possibility of confusion when using numbers for both day and month.

Event type name

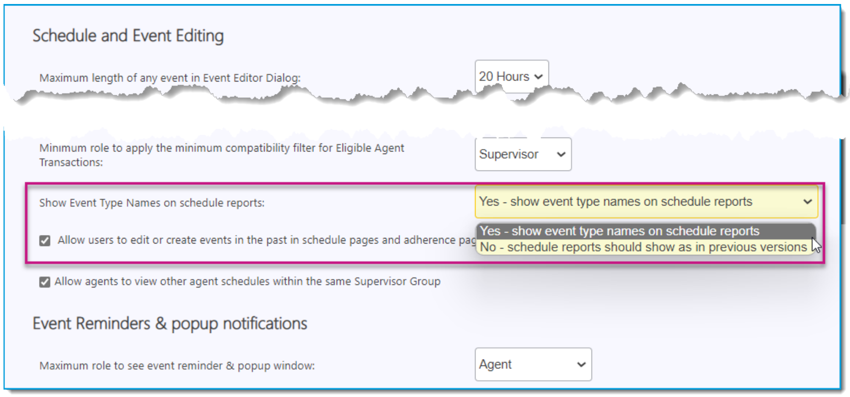
Schedules now include labels describing the event type. No need to search the Event type legend drop-down menu to find out what event is represented by the color.



You can turn off this feature for a single report in the report options panel.



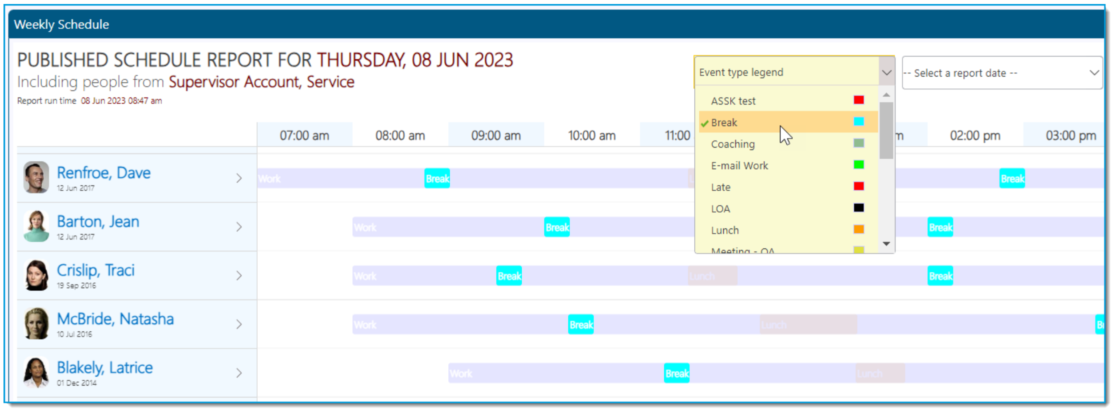
Or turn it off for all reports in the Global settings & preferences – Schedule and Event Editing section.



Spotlight view

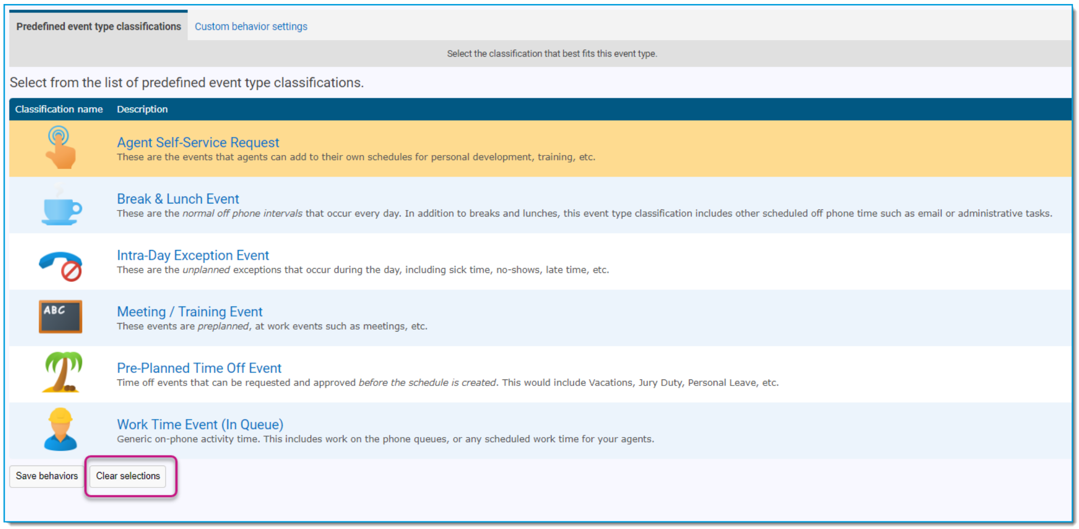
Use a filter to highlight one or more event types on a published schedule. From the Event type legend drop-down menu, click an event name to highlight that event. Click another name to add it to the highlighted events. Click again to deselect the event.

You can still manage the non-highlighted items on the schedule as before (click and drag, right-click edit, etc.).



Event behavior validation

There is a new *Clear selections* button at the bottom of the Event Type Behaviors - Predefined event type classifications, and the Custom behavior settings page. This button will clear all selections and allow selecting your own parameters.



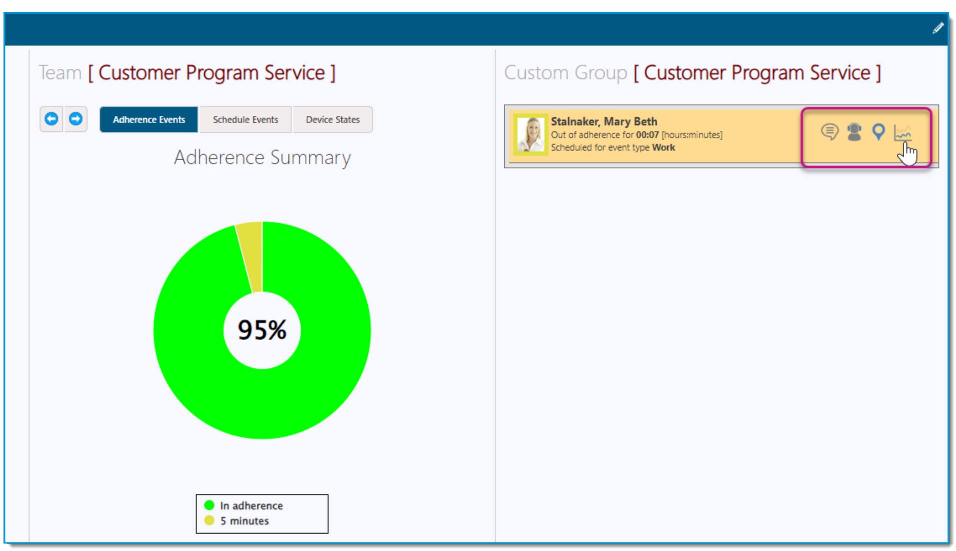
There is a new category for the Agent Self-Service Kiosk, and two new questions validate ASSK events. See ASSK for more information.

Suppress net-line statistics

In reports that include net-line statistics, there is now an option to temporarily disable real-time net-line statistics updates. Find this option in a drop-down menu in the options panel. This will allow making multiple changes without having to wait for the inline statistics to update between edits. The PC button will indicate the number of edits, and refreshing the page or clicking the PC button will update the net-line statistics.

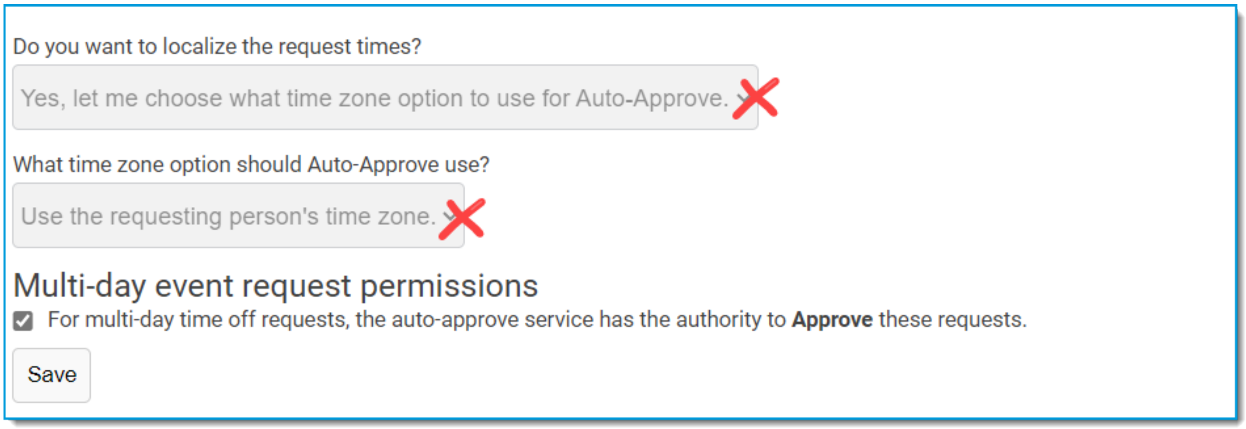
Schedule adherence monitor

In the Schedule Adherence Monitor when viewing the data as a list, there are links where you can not only send a message, but now you can view the agent's profile or check-in status, or quickly launch the agent's Schedule Adherence Summary Report.



Services

Settings > Application settings > Administrative settings > Services | Auto-Approve Service | Advance options: Removed corporate and UTC options from the dropdown *What time zone option should Auto-Approve use?* All time off requests will use the agent's time zone for auto-approval.



Notifications

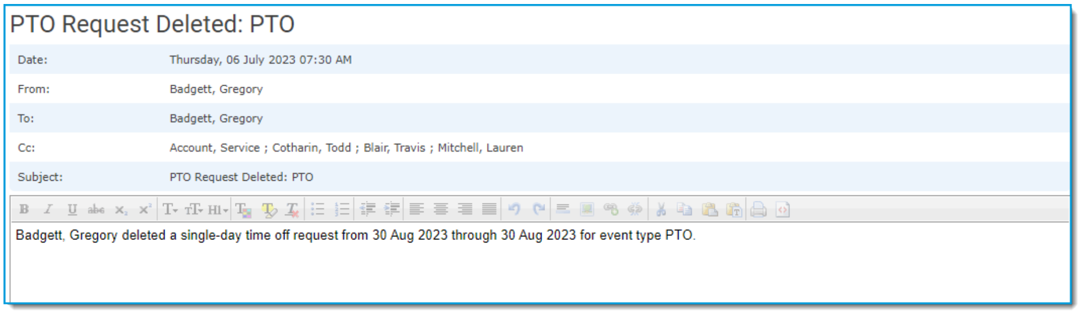
There is an option to add Webex as a notification channel (Settings > Application settings > Administrative settings > Notifications.).

Late check-in or absent

Notification memos are sent to the supervisor tree when agents submit a late check-in or absentee check-in using the Community Everywhere Mobile App.

Deleted PTO request

When an agent **deletes** a denied, pending, or approved time off request, there is a notification to the supervisor tree.

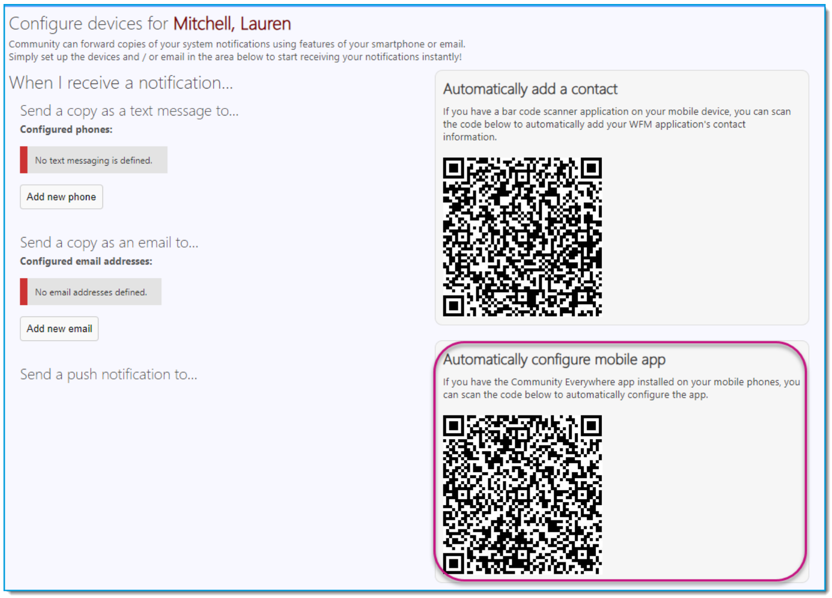


Tools for Supervisors

Mobile app

Supervisors have their own view to monitor team adherence, view and manage attendance, and manage the photo queue, all from the mobile app.

To set up the app with a QR code, supervisors now have access to a Devices page in their menu structure (Properties > Devices). If not visible, check the Applications menu settings. Scan the code from within the mobile app, enter your password, and you're all set!

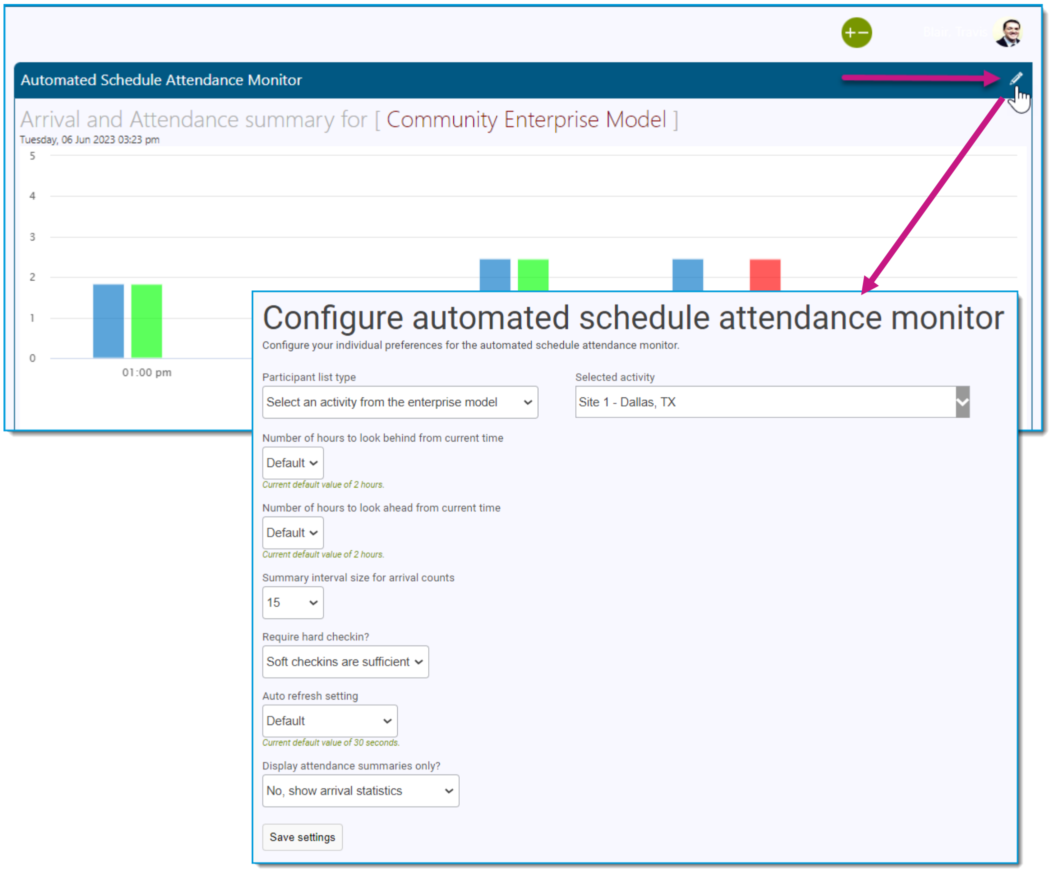


Other mobile app additions

- Language preference transfers from the web application.
- On the Team Adherence page clicking the attendance and adherence buttons replicates the web experience.
- *Hot News* and *Send a message* include the option for selecting the source (Enterprise model, supervisor tree, custom user group).
- When making a time off request, agents can select whether to approve all days together or approve some/deny some.
- Added the ability for agents to delete time off requests from their list.

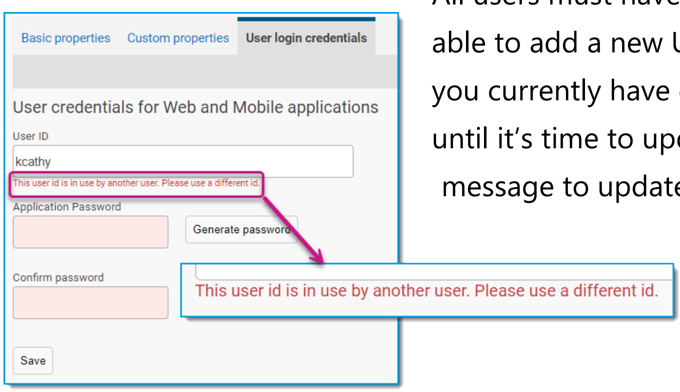
ASAM

Supervisors can now edit and customize their individual preferences for their view of the Automated Schedule Attendance Monitor in the web version. This setting will transfer to the mobile app.



Other Security

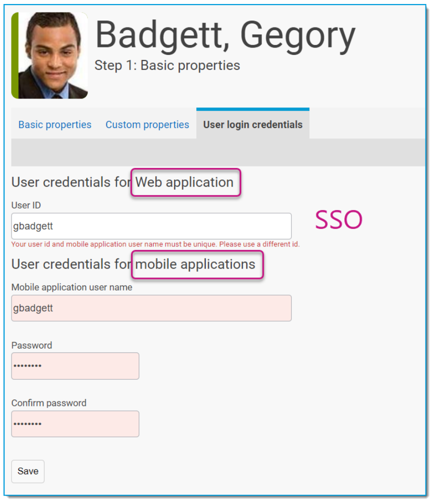
Agent ID and password

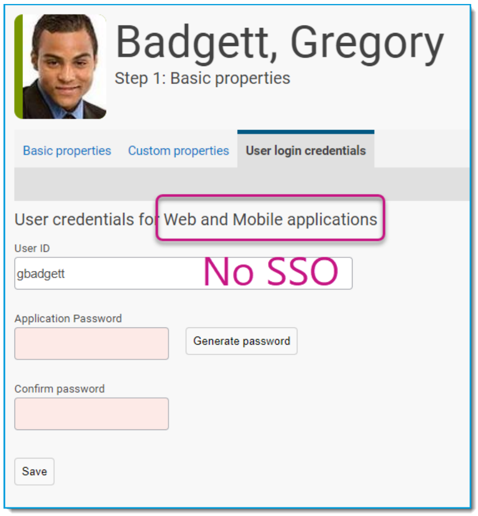


All users must have a unique User ID to log in. You will not be able to add a new User ID that duplicates an existing User ID. If you currently have duplicate User IDs, they will continue to work until it's time to update the password, then there will be a message to update the User ID.

With mobile app and SSO

There are smart labels on the *User login credentials* page: If using the mobile application and SSO/3rd party authentication, there will be fields for two User IDs—web and mobile. With version 5.1 SP2, the User ID can be the same. If your center does not have a license for the mobile app, there will only be a field for a web application User ID.





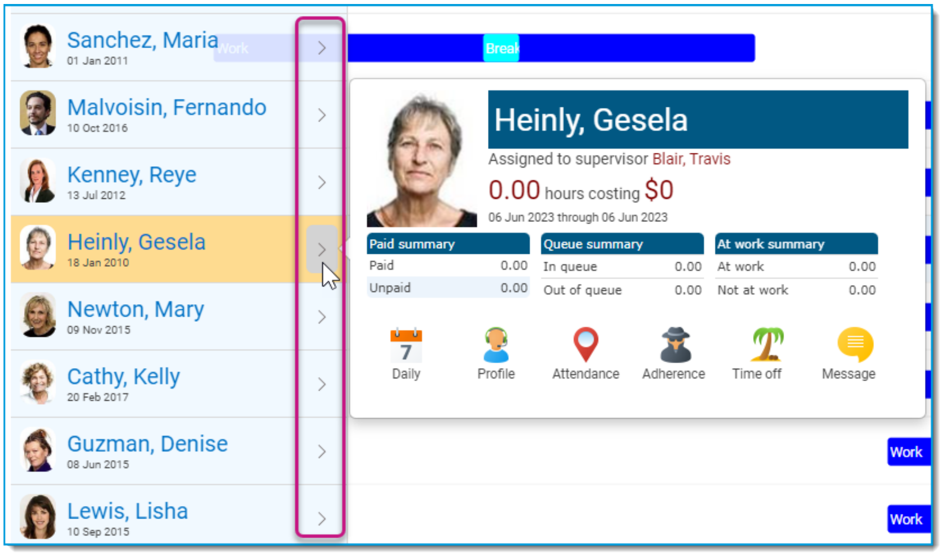
Reports

In several reports, there are visual indicators > for links to display more information.

- From the **Published schedule report**, the link will open the agent card (see below). This link was there before, but not visible.
- In the **Published event summary report,** the link will take you to the Published Schedule Report – no need to go back to the main page (see next page).
- When an agent runs their **Daily schedule adherence report** view, the link will display their state transactions report.

Basically, if you see a > symbol, click on it. Something good will happen!

Published schedule report



Published Event Summary Report

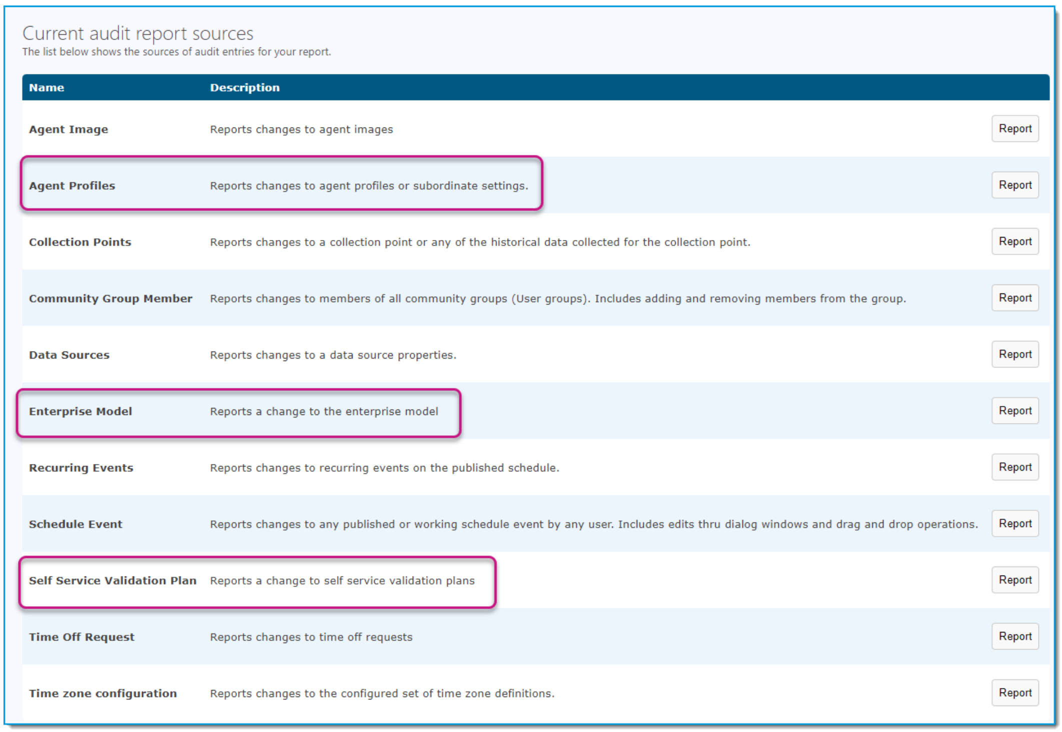
View detail report

You can now navigate from the Published event **summary** report to the Published schedule **detail** report for a selected day using the summary report's time frame. The Published schedule report will open in a new window and the date drop-down will include **all** the days from the summary report.

Enhanced audit trail reporting

Report > Administrative & Utility > Change audit log now includes reports for changes to

- An agent's profile (including activity assignments),
- The Enterprise Model,
- The auto-approve rules and settings, and
- The new Self-service Validation Plan.

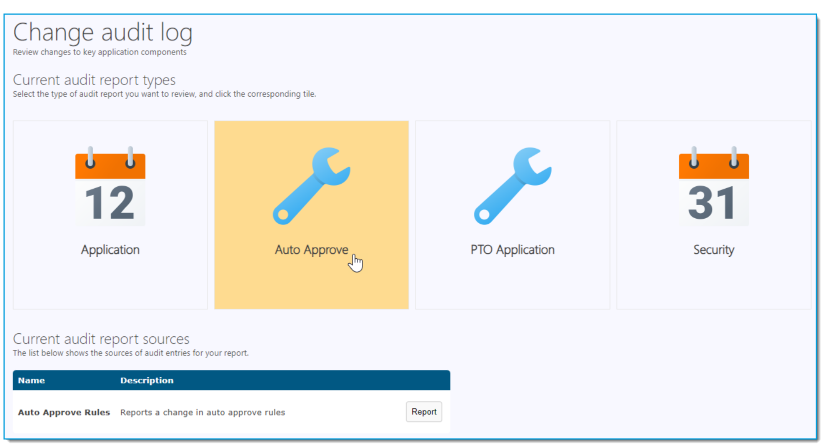


Current audit report sources

The list below shows the sources of audit entries for your report.

Name	Description	
Agent Image	Reports changes to agent images	Report
Agent Profiles	Reports changes to agent profiles or subordinate settings.	Report
Collection Points	Reports changes to a collection point or any of the historical data collected for the collection point.	Report
Community Group Member	Reports changes to members of all community groups (User groups). Includes adding and removing members from the group.	Report
Data Sources	Reports changes to a data source properties.	Report
Enterprise Model	Reports a change to the enterprise model	Report
Recurring Events	Reports changes to recurring events on the published schedule.	Report
Schedule Event	Reports changes to any published or working schedule event by any user. Includes edits thru dialog windows and drag and drop operations.	Report
Self Service Validation Plan	Reports a change to self service validation plans	Report
Time Off Request	Reports changes to time off requests	Report
Time zone configuration	Reports changes to the configured set of time zone definitions.	Report

The Change audit log also has a new tile for Auto Approve rules, which apply to legacy vacation.

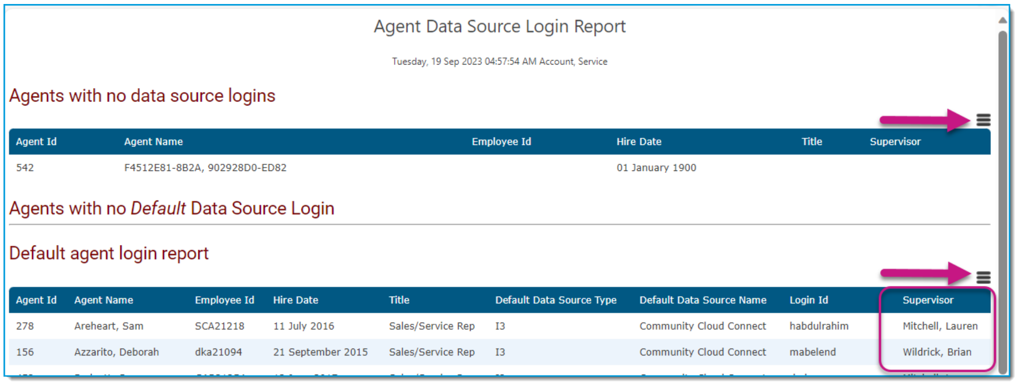


Shrinkage Summary

We've optimized performance and execution speed/time of the Shrinkage summary report to address CPU load and timeout issues.

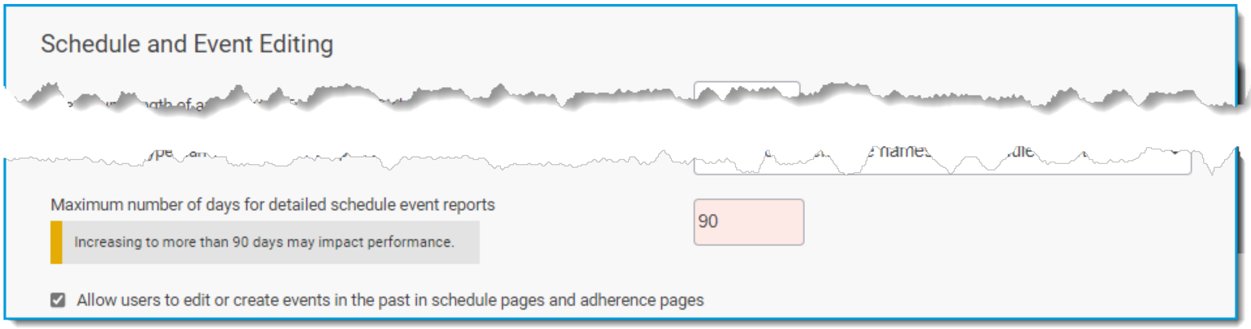
Data Source

The Agent Data Source Login Report (Settings > People & agent templates > Data source logins) now includes an export option and a new column with supervisor name.

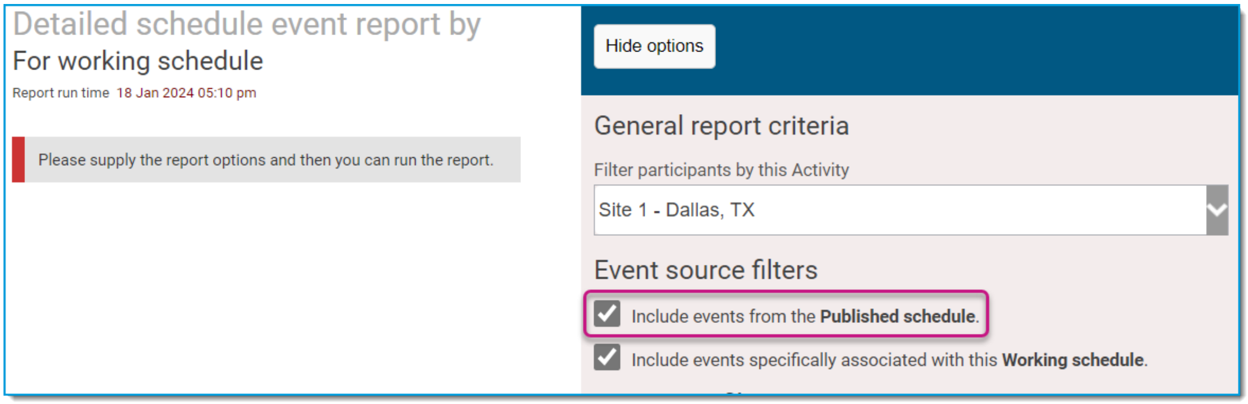


Scheduled events report

There is a new option in *Global settings & preferences* to set the maximum number of days for **detailed** schedule events reports. The default value is 90; maximum is 365.
Note: increasing to more than 90 days may slow performance.



Schedule > Working schedules > Schedule worksheet > Review events & exceptions | Reinstated *Include events from the Published schedule* as a default selected option.



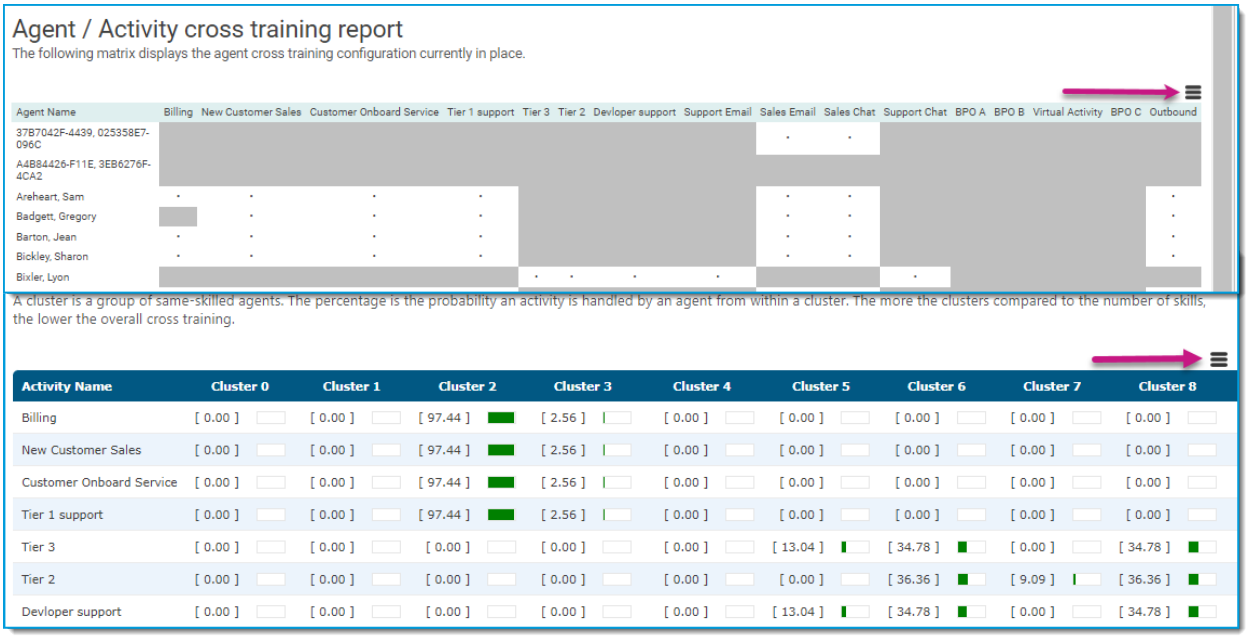
People list

The people list has new columns for user role, email address, login ID, active/inactive status, and supervisor name. There is also a new export option.

Additional report enhancements

Reports > Published Schedule > Published Event Summary | Date picker: added the ability to select a single day.

Forecasts > Working forecasts: Added an **export** option for the Agent / Activity cross-training and cluster reports.



Activity Name	Cluster 0	Cluster 1	Cluster 2	Cluster 3	Cluster 4	Cluster 5	Cluster 6	Cluster 7	Cluster 8
Billing	[0.00]	[0.00]	[97.44]	[2.56]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]
New Customer Sales	[0.00]	[0.00]	[97.44]	[2.56]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]
Customer Onboard Service	[0.00]	[0.00]	[97.44]	[2.56]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]
Tier 1 support	[0.00]	[0.00]	[97.44]	[2.56]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]
Tier 3	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]	[13.04]	[34.78]	[0.00]	[34.78]
Tier 2	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]	[36.36]	[9.09]	[36.36]
Devloper support	[0.00]	[0.00]	[0.00]	[0.00]	[0.00]	[13.04]	[34.78]	[0.00]	[34.78]

Forecast > Published forecast > Show revision history now shows list with last or latest updated at the top.

Report > Schedule adherence > Device state detail report: added **export** report option.

Schedule > Published schedule | Utility Schedule Reports | Published schedule audit report: added unpublished schedule comment and activities affected.

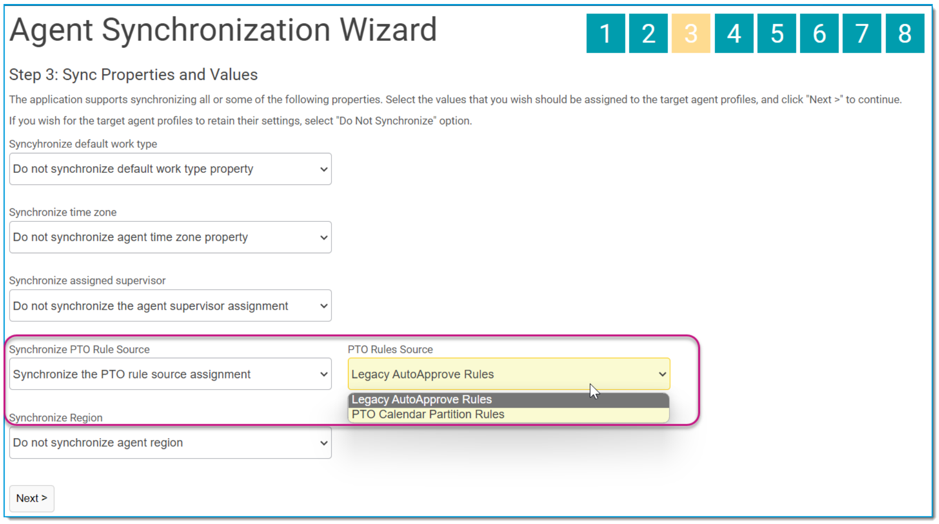
Excel import

When importing contact volume using Excel, Community will now detect duplicate intervals during validation.

PTO Enhancements

Sync PTO Rules Source

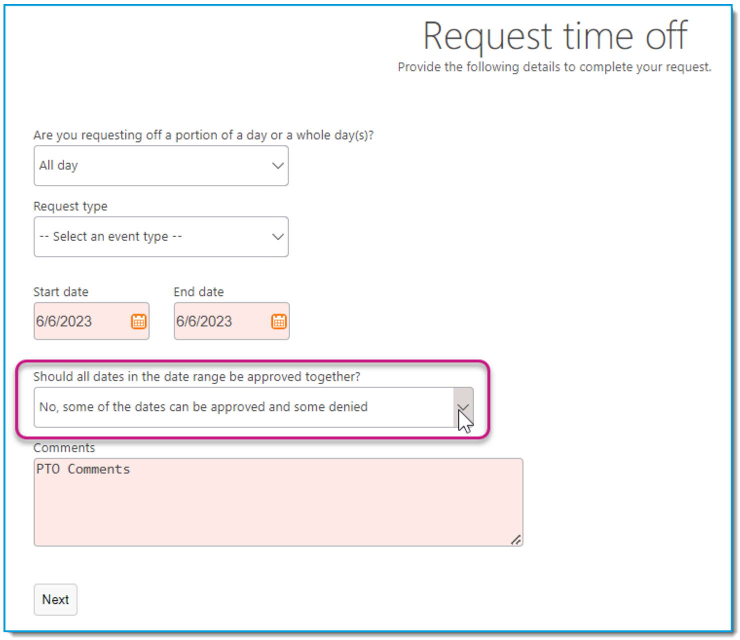
There is an option to sync the PTO Rules Source (PTO Calendar Partition Rules or Legacy AutoApprove Rules) using the Agent Synchronization Wizard. Go to Settings > People & agent templates > Synchronize people > Synchronization people now. In step 3, select the PTO Rules Source.



Request Planned Time Off

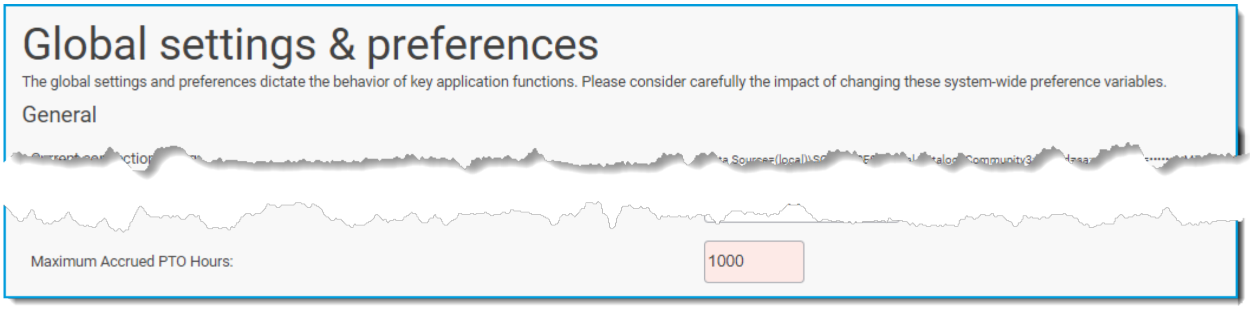
The default response for *Should all dates in the date range be approved together?* is now *No, some of the dates be approved and some denied.* This will prevent inadvertently leaving the response as *Yes* for single day requests or when it is not required that all days be approved, and will allow editing the event on the published schedule.

Note: If using the waiting list in a calendar partition, this option must be set to *Yes*.



Maximum accrued hours

Plan > All things time off > Time off settings > Accrual schedules | Total annual accrual (in hours): In the *Global settings & preferences* you can customize the maximum number of accrued hours used in PTO policy configuration Default is 400; maximum is 1000.



Bid round override validation

Administrators may override an agent's bid round.

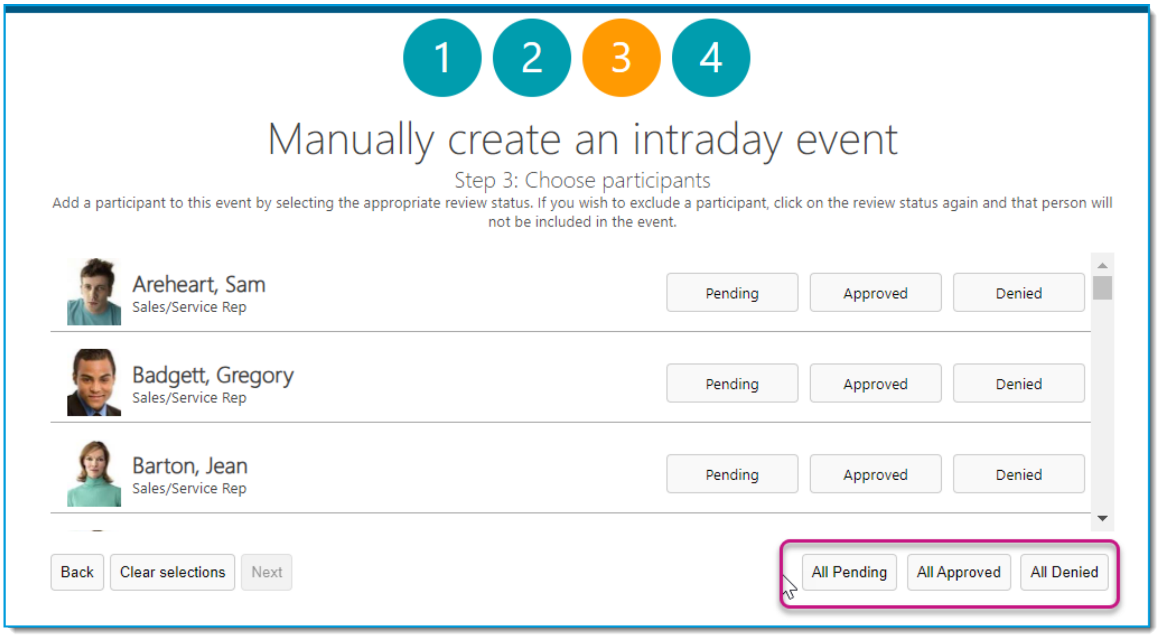
- If the bid round is **not yet committed,** then the bid administrator can override the round validation status.
- If the bid round is **invalid, pending validation, or valid,** then the bid administrator can override the validation status.
- If the bid round is **already committed,** then the bid administrator cannot override the validation status.

Working accrual calendar – Excel import

Plan > All things time off > PTO Calendars > Working accrual calendars > Accrual tables > Generate, import, or enter accrual transactions > File Import - Excel: Changed validation of transaction dates that are outside PTO policy boundaries to Error instead of Warning.

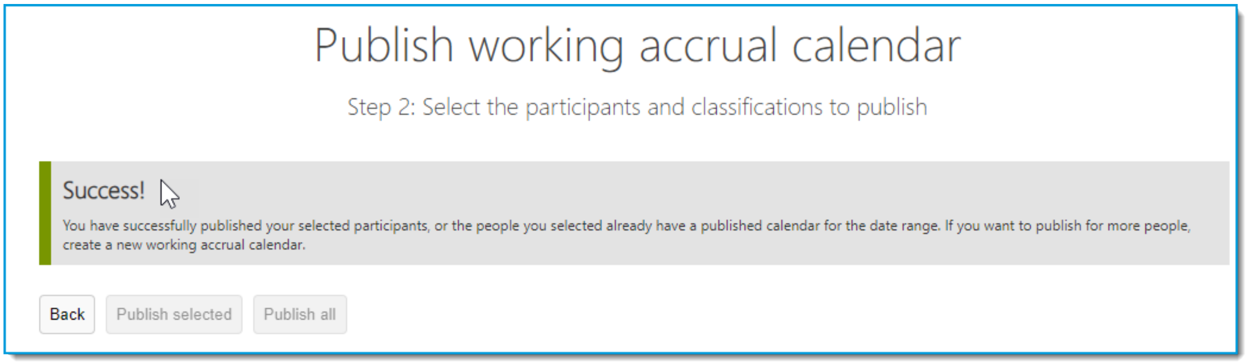
Intraday events for multiple people

Plan > All things time off > Time off events > Create intraday events: When creating an intraday event for multiple people there is now an option to select all people in the list (All Pending | All Approved | All Denied).



Publishing a working accrual calendar

After publishing a working accrual calendar, instead of a warning the on-screen message displays "Success!"

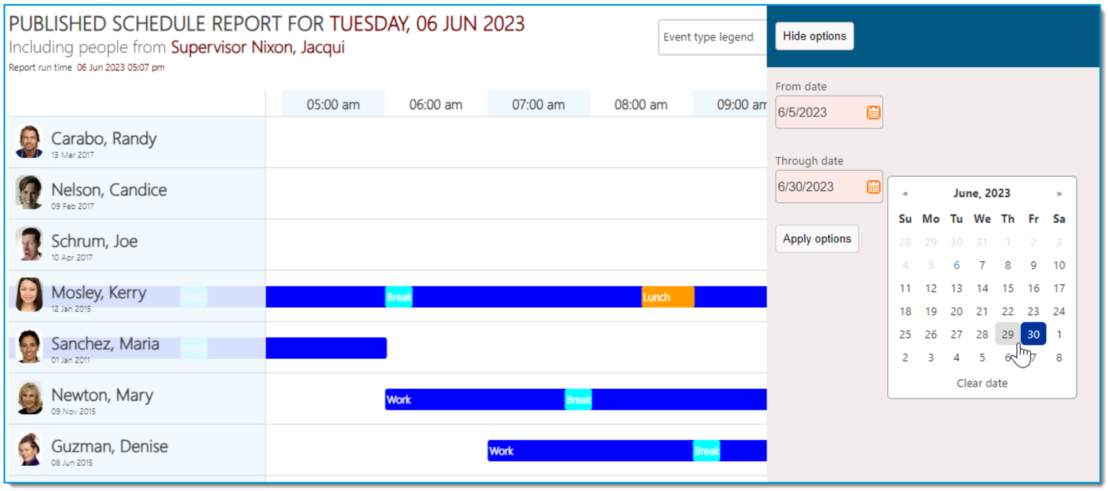


Data sources

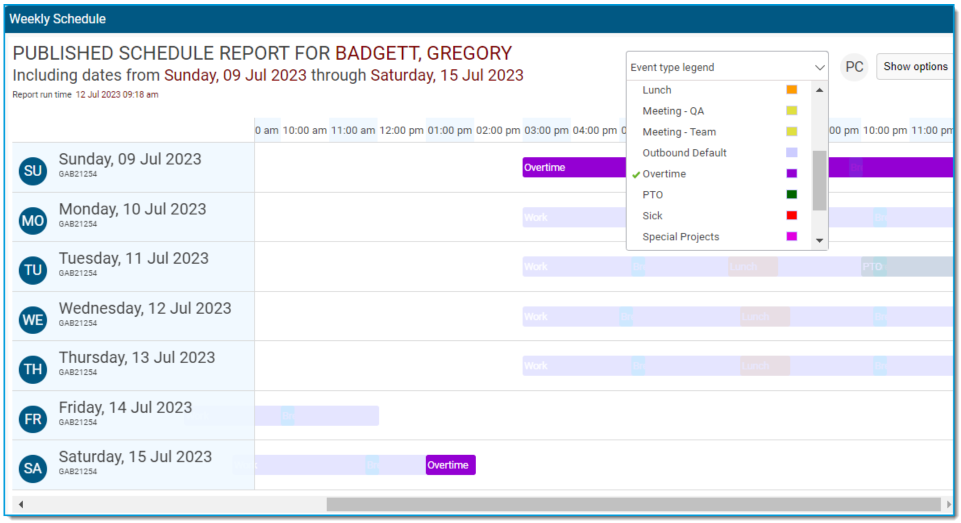
There are new adapters for Zoom, Thrio and Talkdesk.

Agent view

When agents are allowed to view the published schedules for their supervisor group, there is now an options panel to select a date range to view future weeks. This is handy when planning vacations or schedule swaps.



The Spotlight view feature and visible event name applies to an agent's Published Schedule Report.



Time off Worksheet

In the Upcoming time off module, if a request is on the waitlist, the label now has *Waitlisted* instead of *Not eligible*.

The PTO Classification Summary has YTD accrued hours.

Calendar partitions

PTO calendar overview options > Available time off: Turned off the icons on the time off calendar for requests that are in a pending state or denied.

Other Fixes and Enhancements

In an ASAP 'View results' report, there is now an export option.

ASAP Execution Status Report

For adjustment plan Voluntary Time Off Available

		Agent Name	Event Type	Original Description	Adjusted Start	Adjusted End	Adjustment Duration	Created By	Created On
✓	156	Azzarito, Deborah	Work	Scheduled Work	Thursday, 13 Jul 2023 01:00 PM	Thursday, 13 Jul 2023 08:30 PM	7.50	Account, Service	Wednesday, 12 Jul 2023 08:36 AM
✓	451	Barton, Jean	Work	Scheduled Work	Thursday, 13 Jul 2023 08:00 AM	Thursday, 13 Jul 2023 04:00 PM	8.00	Account, Service	Wednesday, 12 Jul 2023 08:36 AM
✓	467	Brown, Chanell	Work	Scheduled Work	Thursday, 13 Jul 2023 12:00 PM	Thursday, 13 Jul 2023 08:00 PM	8.00	Account, Service	Wednesday, 12 Jul 2023 08:36 AM
✓	402	Burns, Barbara	Work	Scheduled Work	Thursday, 13 Jul 2023 10:00 AM	Thursday, 13 Jul 2023 01:15 PM	3.25	Account, Service	Wednesday, 12 Jul 2023 08:36 AM
✓	453	Badgett, Gregory	Work	Scheduled Work	Thursday, 13 Jul 2023 04:00 PM	Friday, 14 Jul 2023 12:00 AM	8.00	Account, Service	Wednesday, 12 Jul 2023 08:36 AM

What’s next?

We hope you will take time to explore the new features in 5.1 and look forward to hearing your feedback as we plan for 5.2.

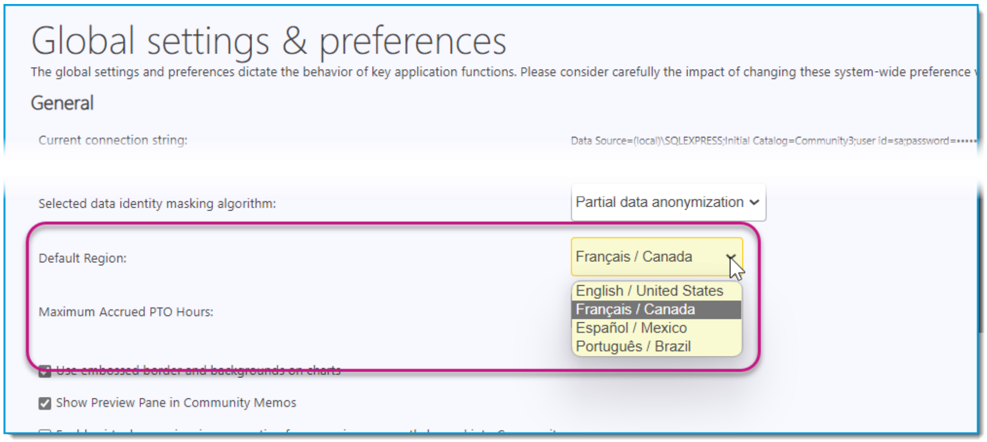
Appendix 1 Region / Language Support

Configuring the language setting

An administrator must make the change for the language preference for individuals and the center.

For the center

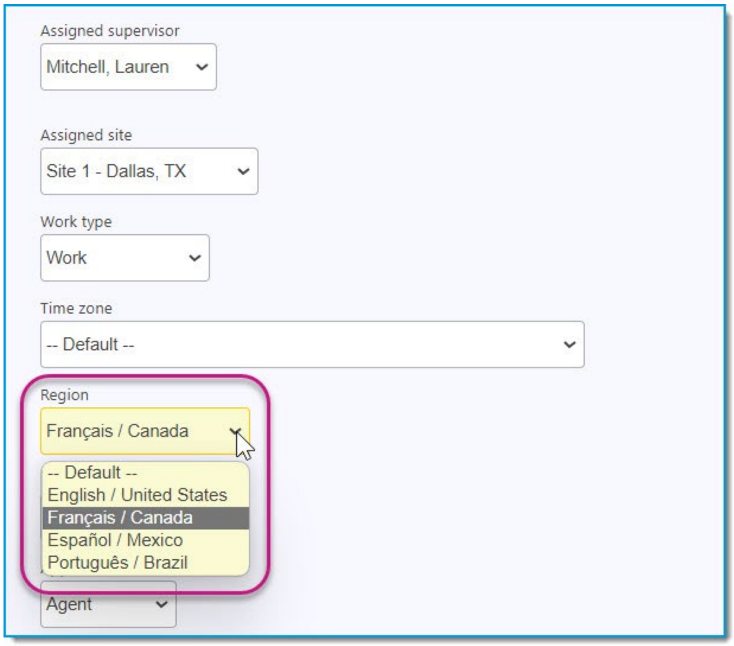
To change the default region / language setting for everyone in the center, navigate to the Global settings & preferences.



At the next login, all users will see Community in the selected language, including the login page.

For an agent

Navigate to the agent's Personal profile | Basic properties tab. In the drop-down for Region, select the preferred language. When the agent next logs in, Community will be in their preferred language. The login page will remain in English.



Synchronize multiple agents to the same language

To change the default language for multiple agents, use the agent synchronization function.

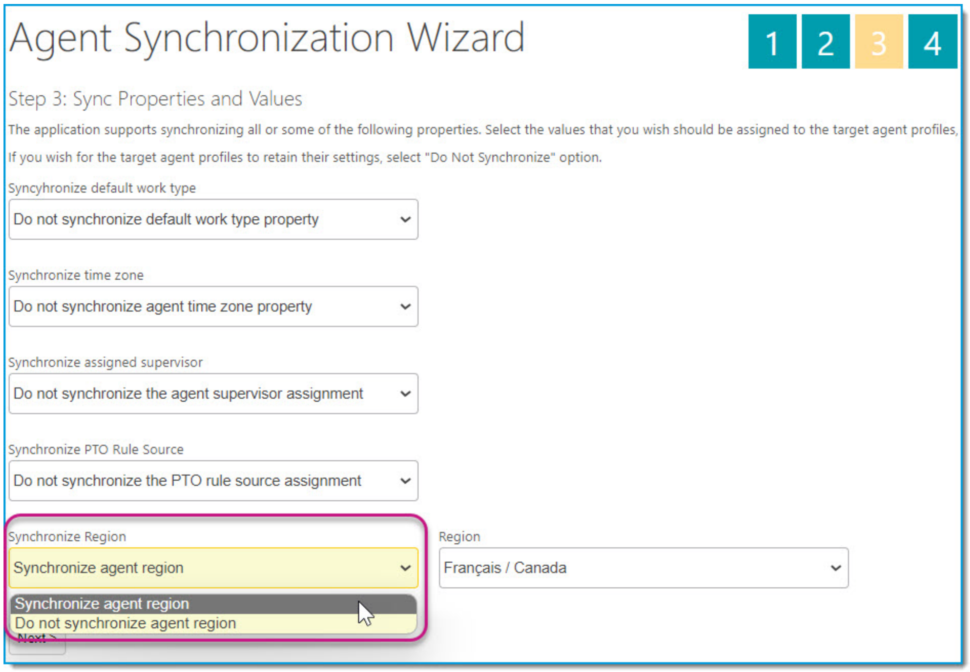
Navigate to Settings > People & agent templates > Synchronize people > Synchronize people now.

Step 1: Introduction. Review the synchronization wizard introduction then click *Next*.

Step 2: Select the site | activity from the drop-down menu. Click *Next*.

Step 3: Sync Properties and Values

- For the first four drop-down menus on the left, change to *Do not synchronize…*
- For Synchronize Region, change the drop-down for *Region* to the preferred language then click *Next*.



Step 4: Sync activity assignments. Click *Skip activities*.

Step 5: Sync schedule template assignments. Click *Skip schedule templates*.

Step 6: Select Participating Agents. Select people by Activity, Supervisor, or Manually. Click *Next*.

Step 7: Confirm Sync settings. Review and confirm selections then click *Synchronize agents*.

Step 8: Synchronization Complete. Review the update status then click *Finish*.

When the agents log in, CommunityWFM will display in the selected language.

Sync template

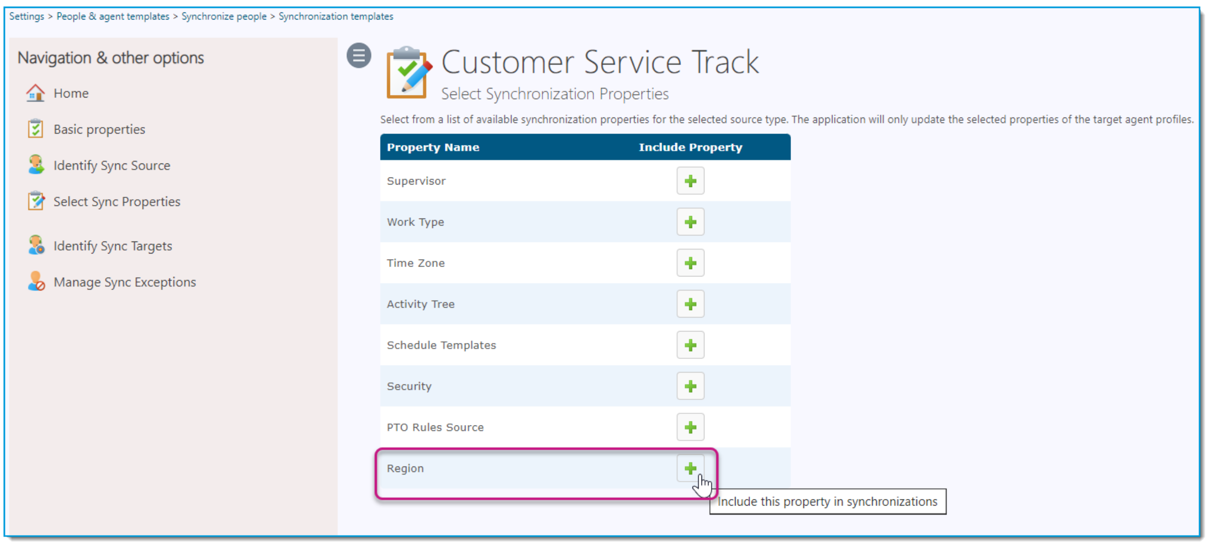
You can also create a synchronization template that includes Region. Navigate to Settings > People & agent templates > Synchronize people > Synchronization templates.

Select *Click here to create a new agent synchronization template.*

Enter a name; description is option.

If desired, check the box to enable automatic updates for this synchronization template.

Follow the Steps to Success and in the *Select Sync Properties* step, make sure Region is checked as a synchronization property.



Appendix 2 Agent Self-Service Kiosk (ASSK)

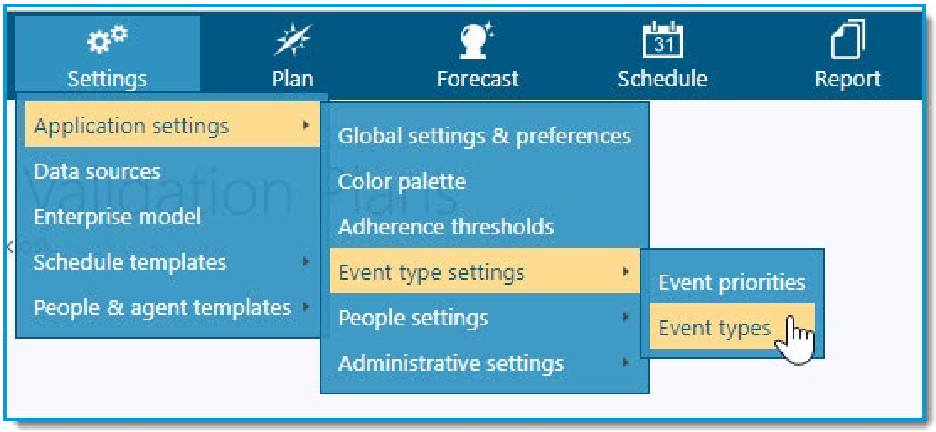
Creating the ASSK event

Application administrator

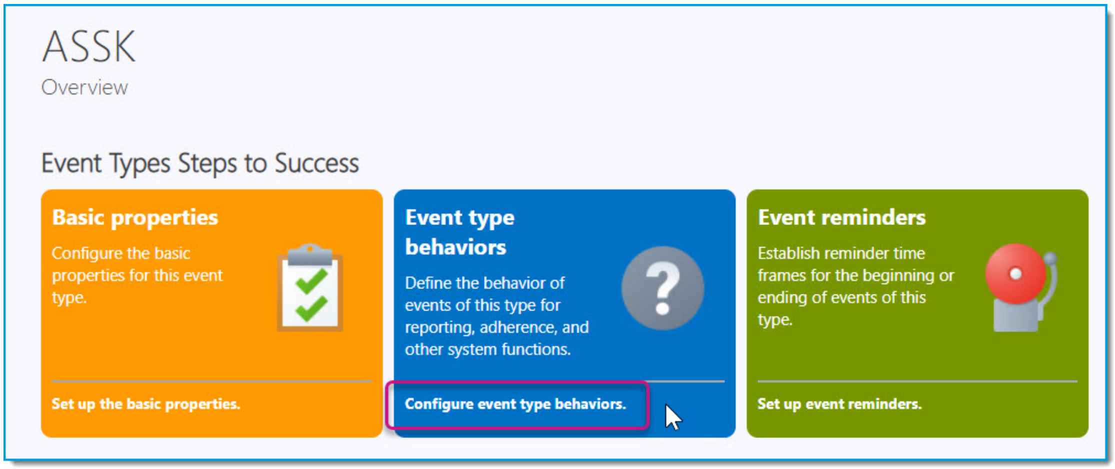
The application administrator identifies the eligible out of queue event types for agent self-service, as well as configuring any applicable business rules used to evaluate individual self-service requests.

Configuring Event Types

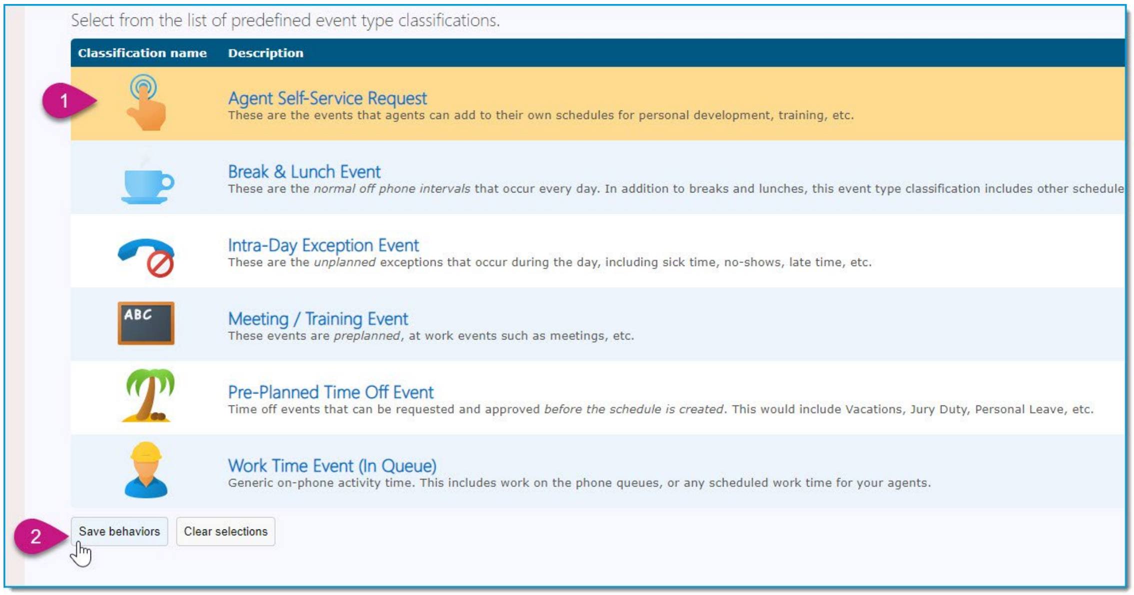
The first step is to create new eligible event types. Navigate to Settings > Application settings > Event type settings > Event types > *Click here to create a new event type.*



After creating the basic properties for the event, navigate to the Event type behaviors.



There is a new predefined event type classification for Agent Self-Service request.



1. Select this classification.
2. Click Save behaviors.

Configuring ASSK event types

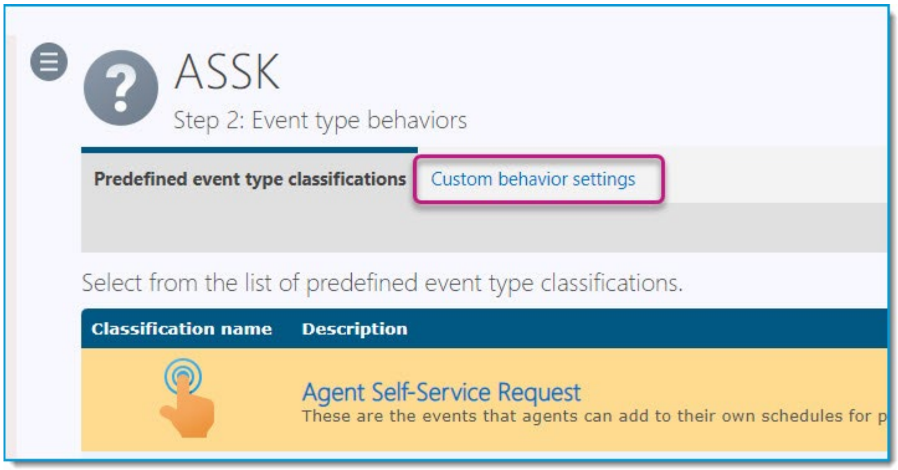
There are two new attributes for event types:

1. **Is this event type available for agent selection in the Agent Self-Service Kiosk?** If *Yes*, the event type will appear on the self-service kiosk page. This is hard-coded as *Yes* for Agent Self-Service Request event types.

2. **If eligible for Agent Self-Service Kiosk, does this event type require rule validation?** If *Yes*, the system will validate the request against the proscribed rule(s) prior to approving the event. If *No*, requests are automatically approved and appear on the schedules when the agent completes the request.

   Available rules include schedule performance (will deny a request if it will result in a staffing shortage), restricted action plans, hire date restrictions, date eligibility, and others. Only events that pass all the validation rules are added to schedules.

To view all the settings, click the *Custom behavior settings* tab.



Custom behavior settings

All events include the option to customize the behavior settings. For ASSK events, some of these options are disabled.

Can this event type be used as a default work type?

This is **false and disabled** for ASSK events because we do not allow agents to perform self-service tasks on work intervals (i.e., they can't make their own work schedule).

Does this event occur at work / onsite?

This is **true and disabled** because we do not allow agents to use the self-service kiosk for time off events.

Is this event type's start time and duration constrained by an agent work type event?

This is **available** because ASSK event types may be constrained by work, or they can be "free floating" events that do not depend on the agent already being scheduled for a work event. For example, if an agent wants to add an hour of online security training to the end of a shift.

Is the scheduled agent logged into a queue during events of this type?

This is **false and disabled** because we do not allow agents to put themselves into an in-queue event – all ASSK events are considered out of queue.

Does this event type require supervisor approval?

This is **false and disabled** because the event types can be independently configured for "requires validation" (the last option), or auto-approved if they do not require validation. This option would conflict with the other behavior settings specific to ASSK enabled event types.

Are agents available for callback into queue during events of this type?

This is **available** to allow recalling an agent currently scheduled in an ASSK event type to return to the queues to handle surging contact volume.

Do events of this type travel with agent schedule swaps?

This option is **available** to enable moving the entire schedule with a swap, giveaway, or takeaway transaction.

For real-time adherence, should agents be considered logged into queue during events of this type?

This option is **available** for ASSK event types because, while the in-queue / out-of-queue option is disabled, there is the option to consider the event in queue for adherence.

By default, these event types are considered "out of queue" for the purpose of counting scheduled agents in queue (to compare with staffing requirements). However, the "in queue for adherence" option may be enabled to control whether these self-service events count as out of adherence intervals.

Is this event type available for agent selection in the Agent Self-Service Kiosk?

This is **true and disabled** for the ASSK event type classification.

If eligible for Agent Self-Service Kiosk, does this event require runtime validation?

This is **available** and determines whether agents can simply select the event type, date, and duration and the event is automatically placed on their published schedule, or if the event must be validated against a collection of rules. If *Yes*, then requests of this type are validated against a collection of user-configurable business rules. If *No*, the request will automatically be approved and appear on an agent's schedule.

Self-service validation plans

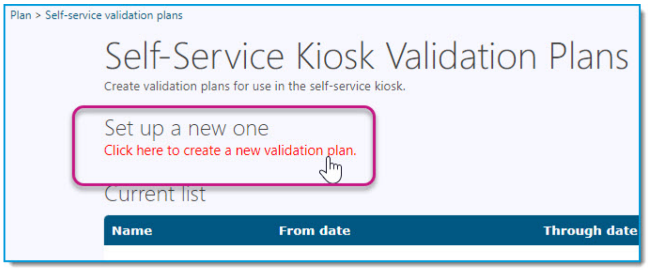
The self-service kiosk feature includes the ability to create Self-Service Kiosk Validation Plans – sets of business rules that will run prior to placing a requested ASSK event on an agent's schedule.

These plans are named and reusable containers that match event types to business rules and contain the following elements:

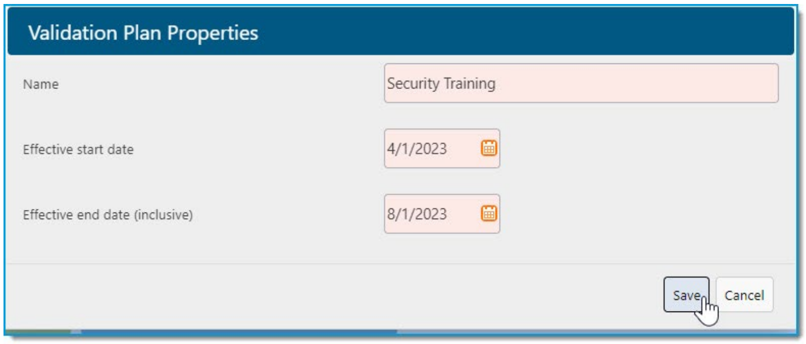
- An **effective date range** defines the applicable date range for the business rules. This supports a different collection of rules for different times of year. This date range is used to validate the Date Range Eligibility Rule.
- **Event Types** defines the inventory of self-service event types that are included in this validation plan. You may include an event in more than one plan.
- For each Event Type, you can configure the applicable business rules and parameters. The rule may be toggled on / off, and any that require user defined values (e.g., Schedule Performance Rule), will allow input of specific values.
- A **Participant** list defines the inventory of agents to whom the business rules apply. This can be based on an activity, a supervisor, a custom user group, or an ad-hoc collection of agents. **Note:** an agent may be assigned to overlapping validation plans. In this case, the validation engine will validate all rules from all applicable plans.

Creating the validation plan

1. Navigate to Plan > Self-service validation plans.
2. Select *Click here to create a new validation plan*.



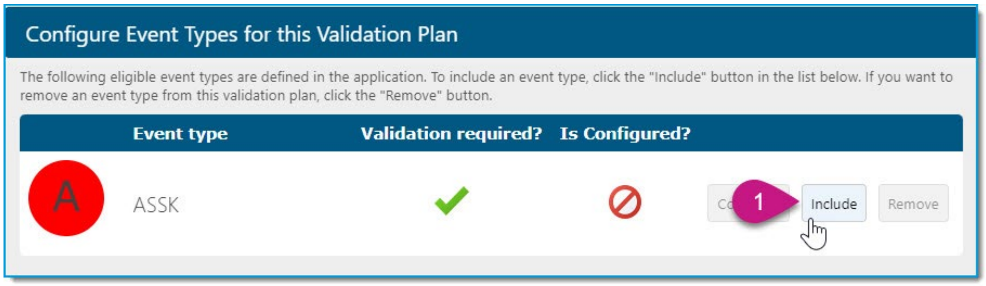
3. Provide a name and effective date range for the plan.
4. Click *Save*.



Adding member event types

Click *Set up member event types*.

1. Click *Include* for each event type that you wish to include in the validation plan.

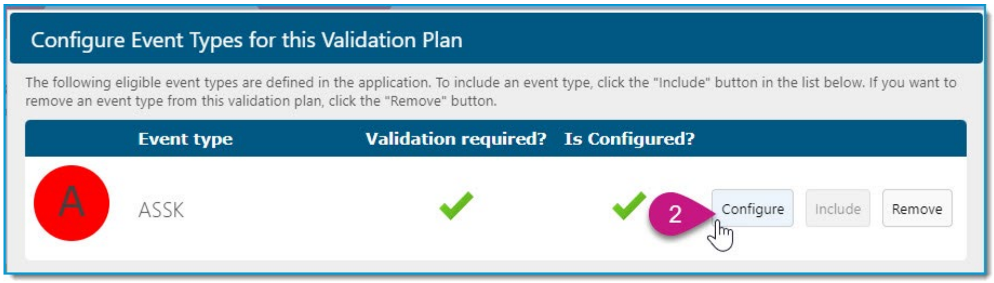


If the event type is not listed, check the custom behavior settings of the event (Settings > Application settings > Event type settings > Event types > Event type hub) to ensure that the event has *Yes* for *Is this event type available for agent selection in the Agent Self-Service Kiosk?* and *Yes* for *If eligible for Agent Self-Service Kiosk, does this require runtime validation?*

Both must be *Yes* for the event to appear on the list of event types eligible for a validation plan.

Configuring the business rules

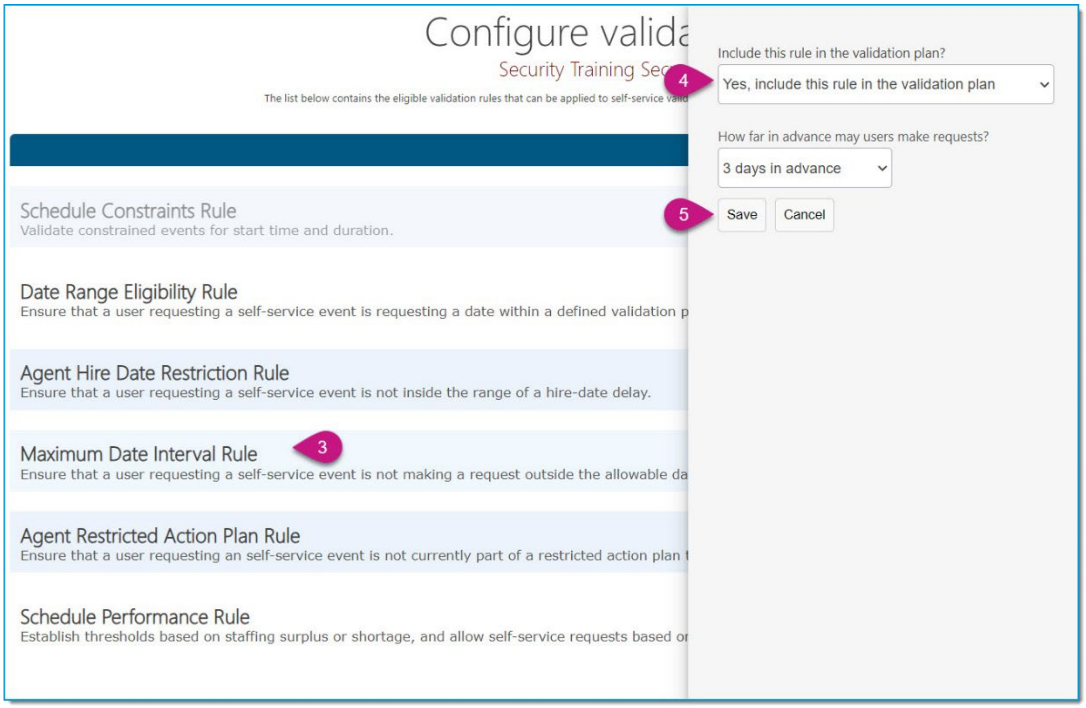
2. For each included event type click *Configure* to set up the rules.



3. To apply a rule, click the rule name to open the configuration panel.

4. Select *Yes, include this rule in the validation plan* from the drop-down menu. For some rules there are additional options.

5. Click *Save* for each rule setting after configuring.



The following business rules may be applied to self-service requests:

- **Schedule Constraints Rule** This rule checks the event behavior setting *Is this event type's start time and duration constrained by an agent work type event?* If *Yes*, it will deny the request if the start time and duration is not within a scheduled work event. If the event is not constrained by work, the validation engine does not evaluate this rule.
- **Date Range Eligibility Rule** will deny any request outside the date range specified in the validation plan basic properties. If the event custom behavior setting does not require runtime validation, this rule does not apply.
- **Agent Hire Date Restriction Rule** will deny any self-service request initiated by an agent who is currently inside a “new hire” window.
- **Maximum Date Interval Rule** allows determining how far in advance a given self-service request may be granted. This supports, for example, the ability to restrict self-service requests any further out than two weeks. If included, select the number of days in advance an agent can make a request from same day only or up to 30 days in advance.

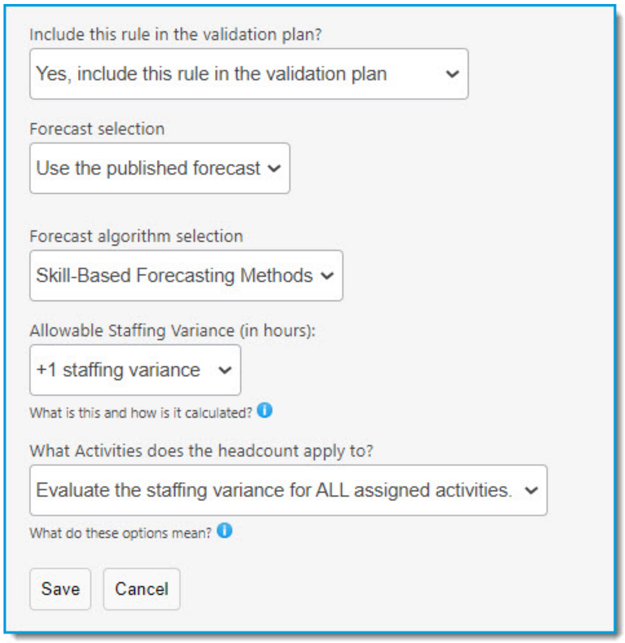
- **Agent Restricted Action Plan Rule** will deny any self-service request initiated by an agent who is currently subject to a restricted action plan (RAP) that includes self-service activities.

- **Schedule Performance Rule** allows establishing thresholds based on schedule shortage / surplus (scheduled staff vs. forecasted staffing requirements). Any self-service request that would, for example, drop the staffing shortage below the given threshold would be denied.

- **Event Duration Rule** If enabled, this rule allows setting a minimum and maximum duration for the request. Minimum can be 0:00. For example, if the allowable event duration is 30 minutes, a request for one hour will be denied.

Additional options for Schedule Performance Rule

Forecast selection: Allows basing the rule on the published forecast or you may select any working forecast.



Forecast algorithm selection: For most leave at *Skill-based forecasting methods*, however, you may change to standard forecasting or manual entry.

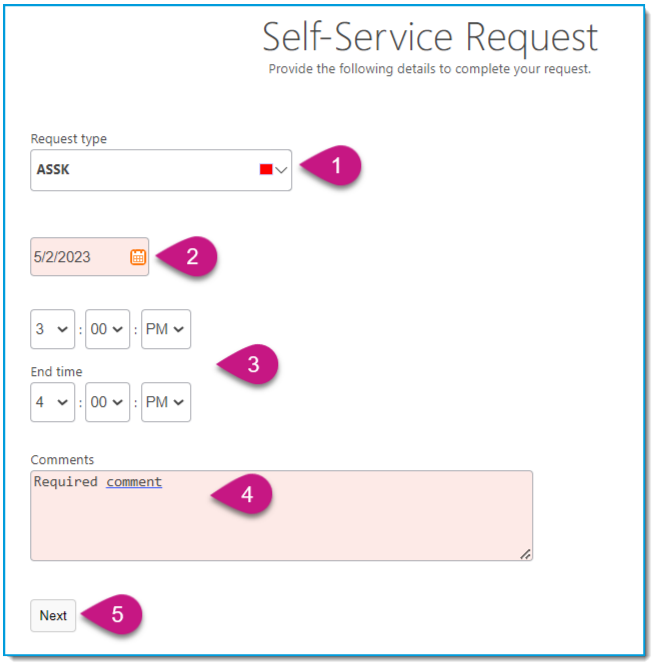
Allowable Staffing Variance (in hours): This allows the system to approve or deny the ASSK event based on forecasted staffing variance. The staffing variance is calculated by subtracting the required people from the scheduled people for the duration of the self-service request and converting that to staffing hours. The application then converts to staffing hours error by dividing the net staffing number by the number of intervals per hour (typically 4). Select from -10 to +15 staffing hour error. Because of the variance in staffing in the net-line statistics, this looks at the average over the duration of the event. Selecting +2 or +3 will allow for shrinkage or changes in call volume. Selecting a negative number will allow understaffing for the interval (e.g., for mandatory training when it's OK to miss service level for the interval).

What Activities does the headcount apply to? How should the system account for multi-skilled agents? Select ALL activities or EACH activity. Applying the rule to ALL activities means the staffing net lines are calculated using all activities combined, and the rule will fail if the total net staffing hours error for all activities is below the specified threshold. However, if the rule is applied to EACH activity, the rule will fail if ANY activity has a net staffing hour that is below the specified threshold.

Agent view

To add an event to their schedule, agents navigate to Schedule > Self-service request and complete the form.

1. **Request type:** Select the event. Only designated events will appear on the list.
2. **Date:** The date for the event.
3. **Start and end time:** Whether time is constrained by work may be configured in the settings.
4. **Description / comment** Required.
5. Click ***Next*** then Save to submit the request.

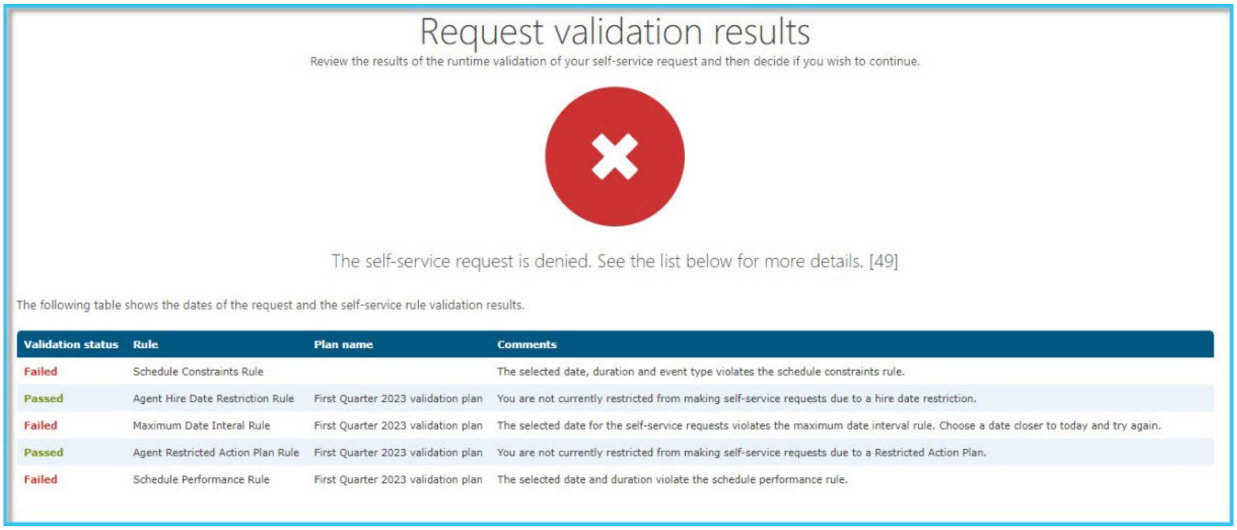


If the selected event type does not require business rule validation, the event is "approved" and will immediately appear on the published schedule after the agent checks a box to acknowledge the change to their schedule and *Saves*.

If the selected event type requires business rule validation, then the application validates the request against the applicable business rules.

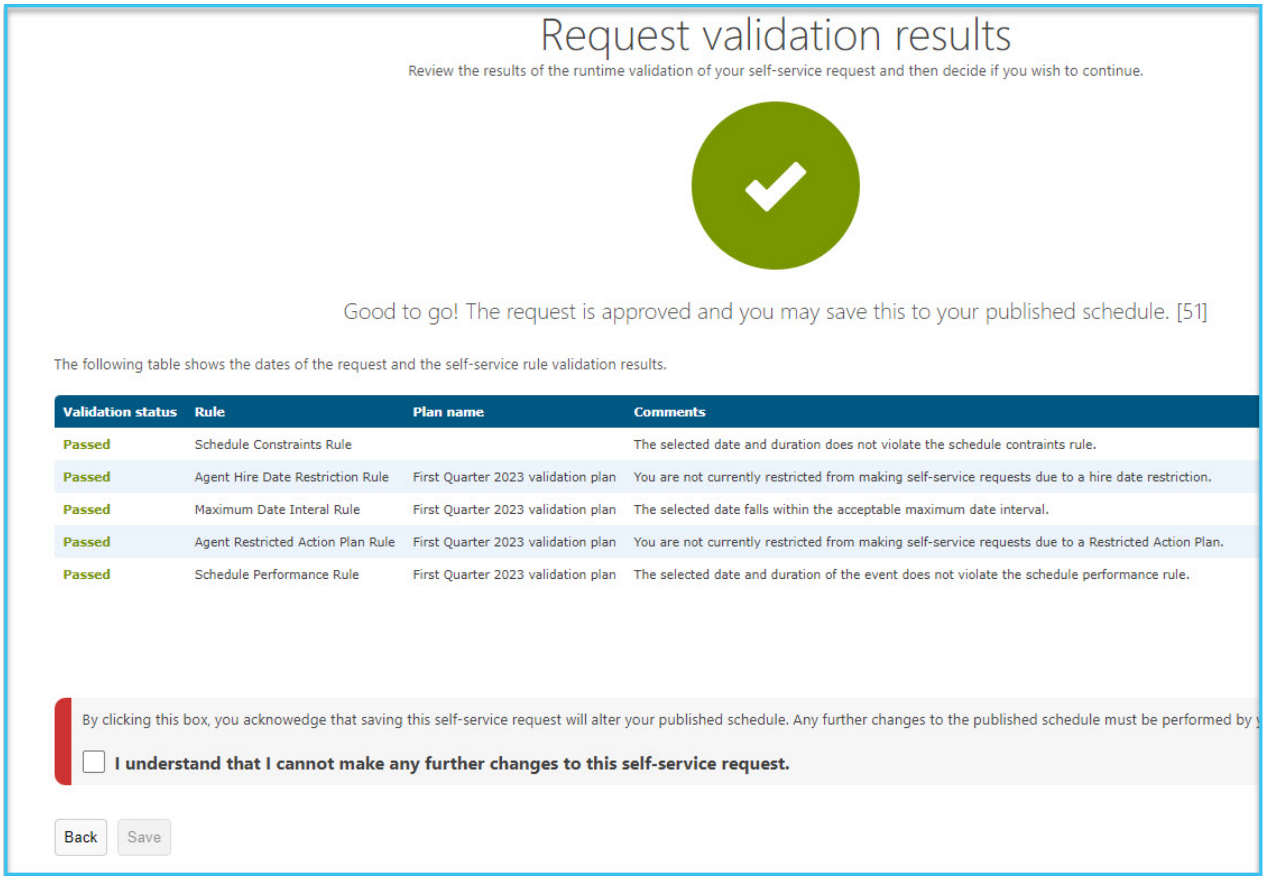
If **any** rule from **any validation plan** fails, the application will deny the request.

Events that do not pass validation are not placed on a published schedule. Agents are not able to save an event that fails validation but can go back and change the parameters of the request and try again.



Validation status	Rule	Plan name	Comments
Failed	Schedule Constraints Rule		The selected date, duration and event type violates the schedule constraints rule.
Passed	Agent Hire Date Restriction Rule	First Quarter 2023 validation plan	You are not currently restricted from making self-service requests due to a hire date restriction.
Failed	Maximum Date Interal Rule	First Quarter 2023 validation plan	The selected date for the self-service requests violates the maximum date interval rule. Choose a date closer to today and try again.
Passed	Agent Restricted Action Plan Rule	First Quarter 2023 validation plan	You are not currently restricted from making self-service requests due to a Restricted Action Plan.
Failed	Schedule Performance Rule	First Quarter 2023 validation plan	The selected date and duration violate the schedule performance rule.

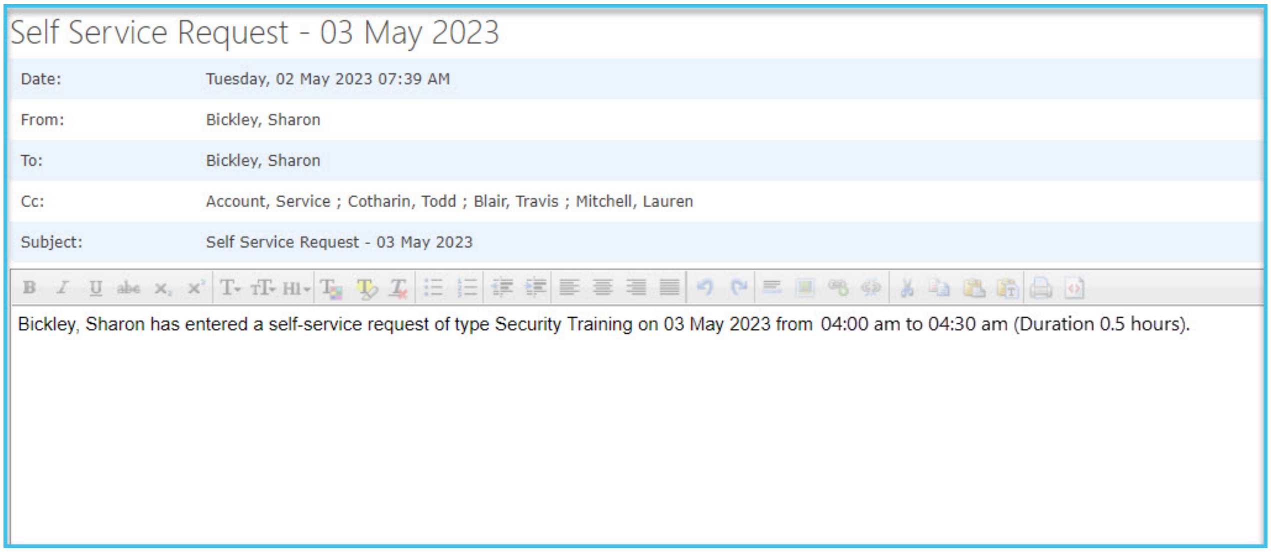
Only events that pass validation appear on the agent's published schedule (after acknowledgement and saving by the agent).



Validation status	Rule	Plan name	Comments
Passed	Schedule Constraints Rule		The selected date and duration does not violate the schedule contraints rule.
Passed	Agent Hire Date Restriction Rule	First Quarter 2023 validation plan	You are not currently restricted from making self-service requests due to a hire date restriction.
Passed	Maximum Date Interal Rule	First Quarter 2023 validation plan	The selected date falls within the acceptable maximum date interval.
Passed	Agent Restricted Action Plan Rule	First Quarter 2023 validation plan	You are not currently restricted from making self-service requests due to a Restricted Action Plan.
Passed	Schedule Performance Rule	First Quarter 2023 validation plan	The selected date and duration of the event does not violate the schedule performance rule.

Notifications

When the agent creates an approved self-service request, the CommunityWFM notification server will send a notification to the agent, the agent’s immediate supervisor, and any scheduler or administrator from the same site as the requesting agent.


Self Service Request - 03 May 2023

Date:	Tuesday, 02 May 2023 07:39 AM
From:	Bickley, Sharon
To:	Bickley, Sharon
Cc:	Account, Service ; Cotharin, Todd ; Blair, Travis ; Mitchell, Lauren
Subject:	Self Service Request - 03 May 2023

Bickley, Sharon has entered a self-service request of type Security Training on 03 May 2023 from 04:00 am to 04:30 am (Duration 0.5 hours).

Troubleshooting

Schedule constraints error when making a request.

When making a request, an agent is getting a message that it can’t be completed due to The selected date, duration, and event type violates the schedule constraints rule. This may be due to:

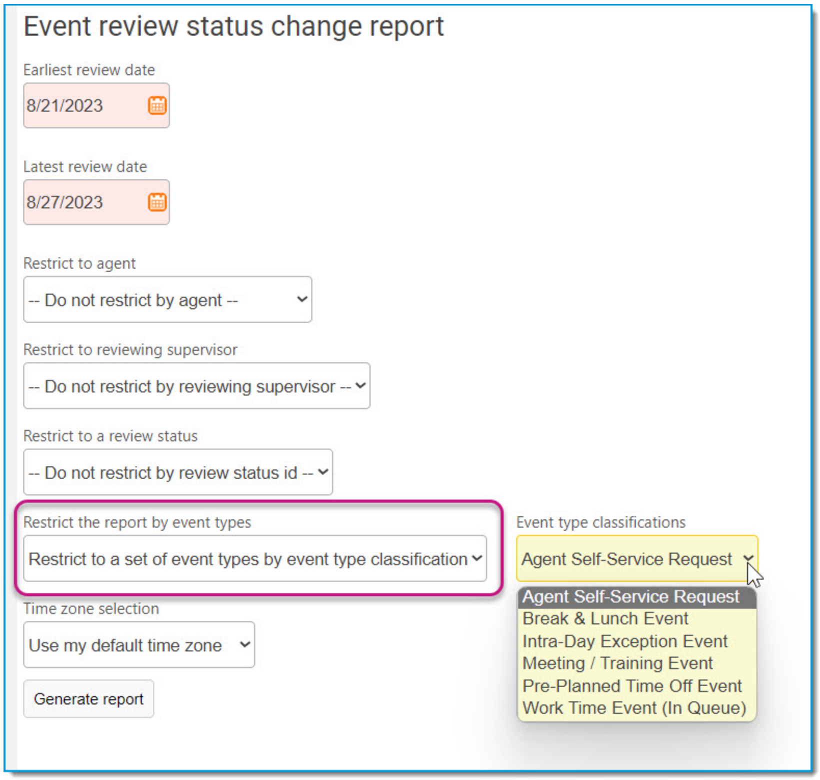
- No schedule in place for the date/time of the request if the event type behavior is set to be constrained by work (i.e., a schedule must be in place for the time of the ASSK event).

How can I tell who has changed an ASSK event?

If a supervisor makes changes to an ASSK event, you can review who made the change in the Change audit log (Report > Administrative & utility > Change audit log > Application > Schedule event report). Agents can't edit an ASSK event after it is on their schedule.

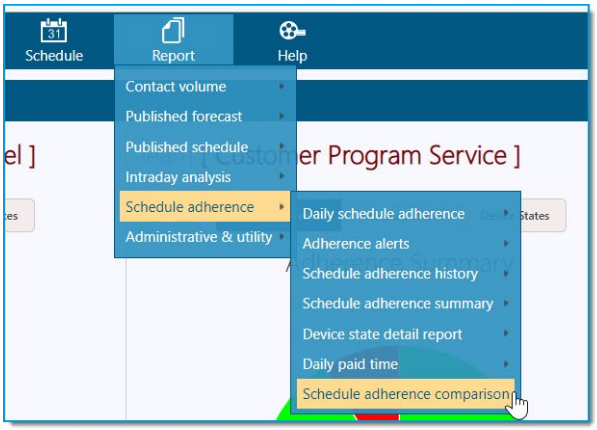
How can I tell who has requested/received an ASSK event?

To determine who has added the event type to their schedule, you can run an event review status change report. Navigate to Report > Administrative & utility > Event Review Status Change. One of the options is to *Restrict the report by event types*. Select the ASSK event to see who added the event, and the date and time on their schedule.

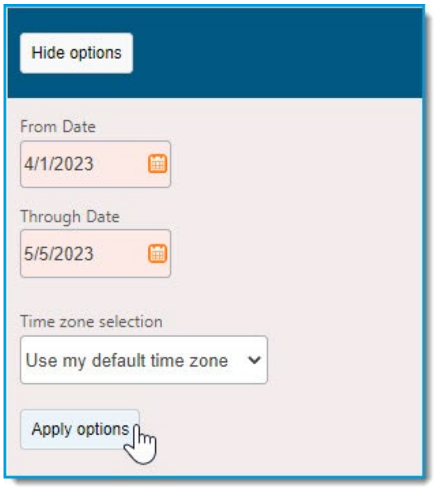


Appendix 3 Adherence Comparison Report

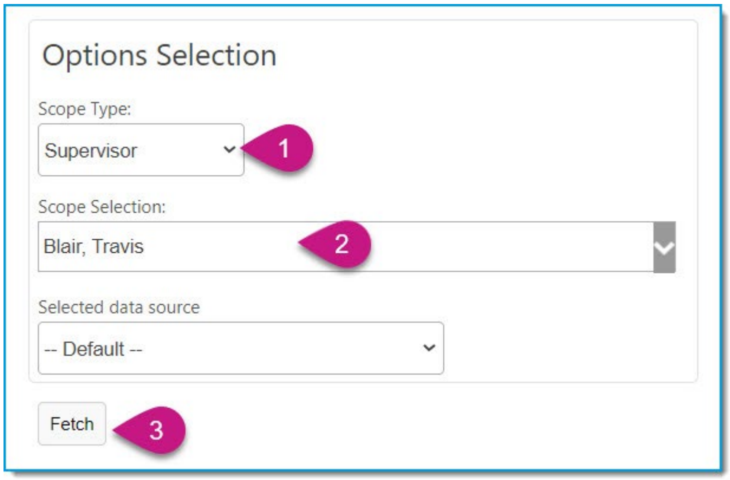
To get started, navigate to Report > Schedule adherence > Schedule adherence comparison.



Select a date range in the options panel then click *Apply options*.



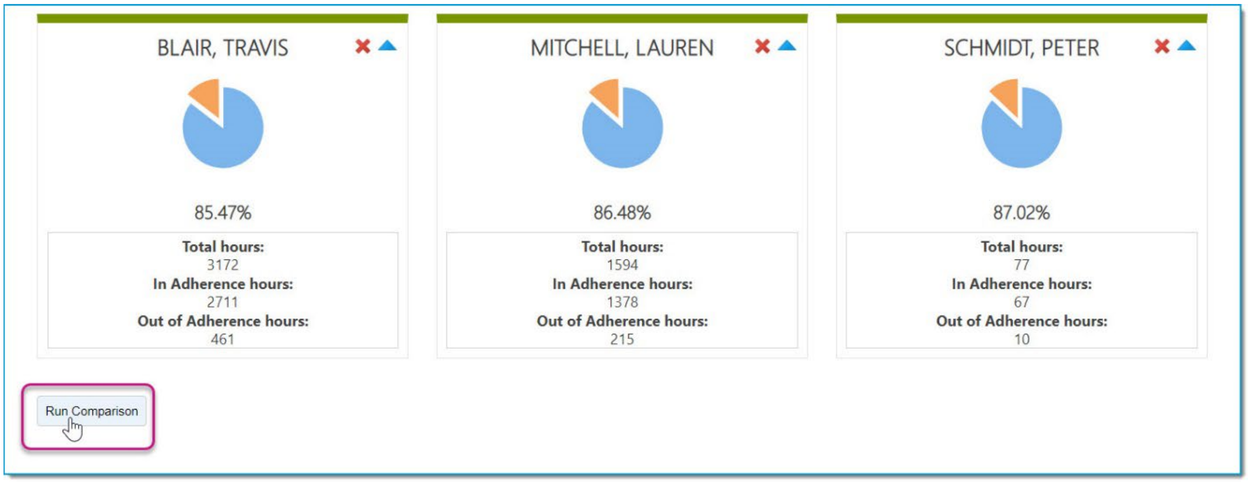
1. Select the first item for the comparison: In Options Selection, select a scope type (Enterprise Model, Supervisor Group, or Custom User Group).
2. Select the item to compare in the Scope Selection drop-down menu.
3. Click Fetch.



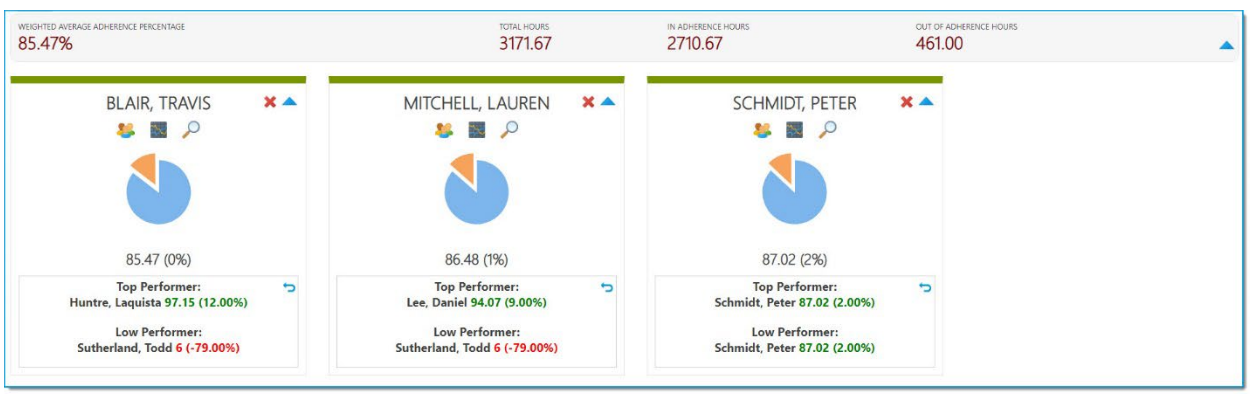
4. Return to the *Options Selection* section and use the same steps to select the next item to add to the comparison.

5. Repeat for up to five scopes.

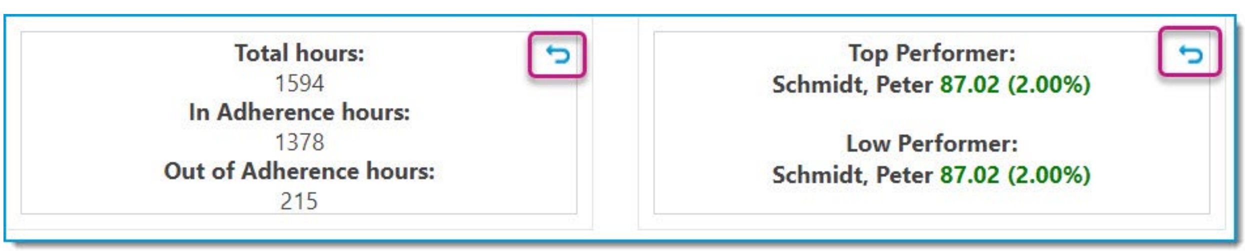
6. After making all selections, click *Run Comparison*.



The dashboard shows each site/activity/supervisor/group, the overall adherence percentage, top and low performer, and includes graphs with links to expose details.



Click the blue arrow to toggle between the overall adherence hour stats and top/low performer.



Use the icons at the top of each item to view additional data.

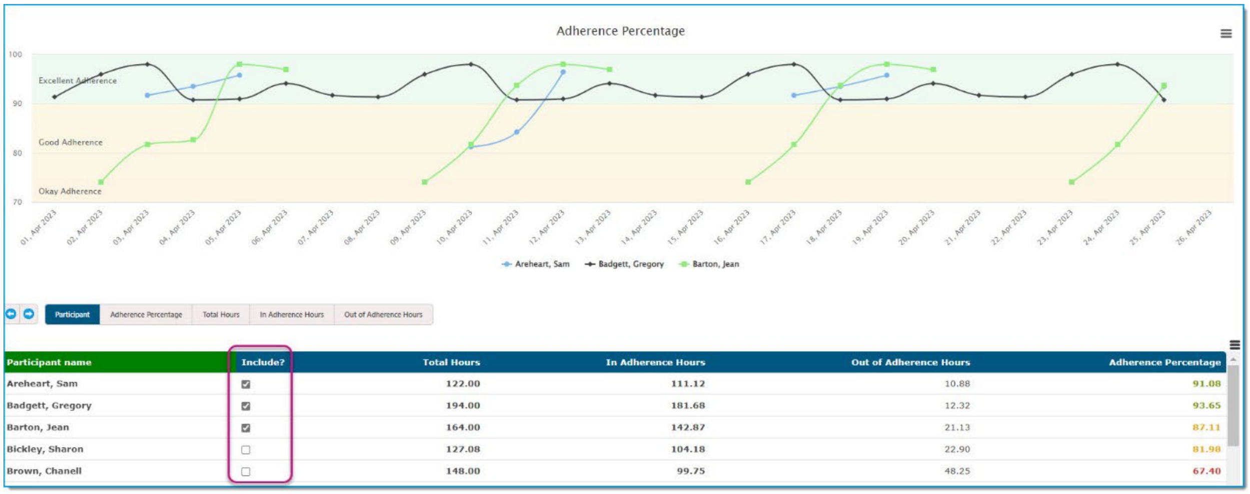
Use the blue arrows ▼▲ to expand / collapse the sections for easier viewing. Click the red X to remove the item from the comparison.

The people icon will display on the bottom of the screen the people in that activity.

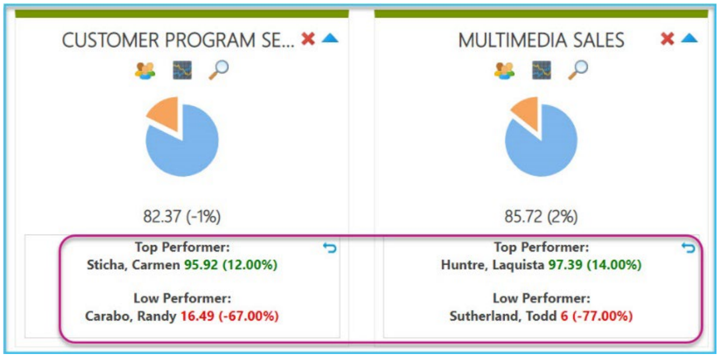
The graph icon will display a graph of the adherence for that activity over the time of the report. Click on the graph icon in multiple activities to add them to the display.

Click the magnifying glass icon to launch a new window with the adherence summary report for that activity.

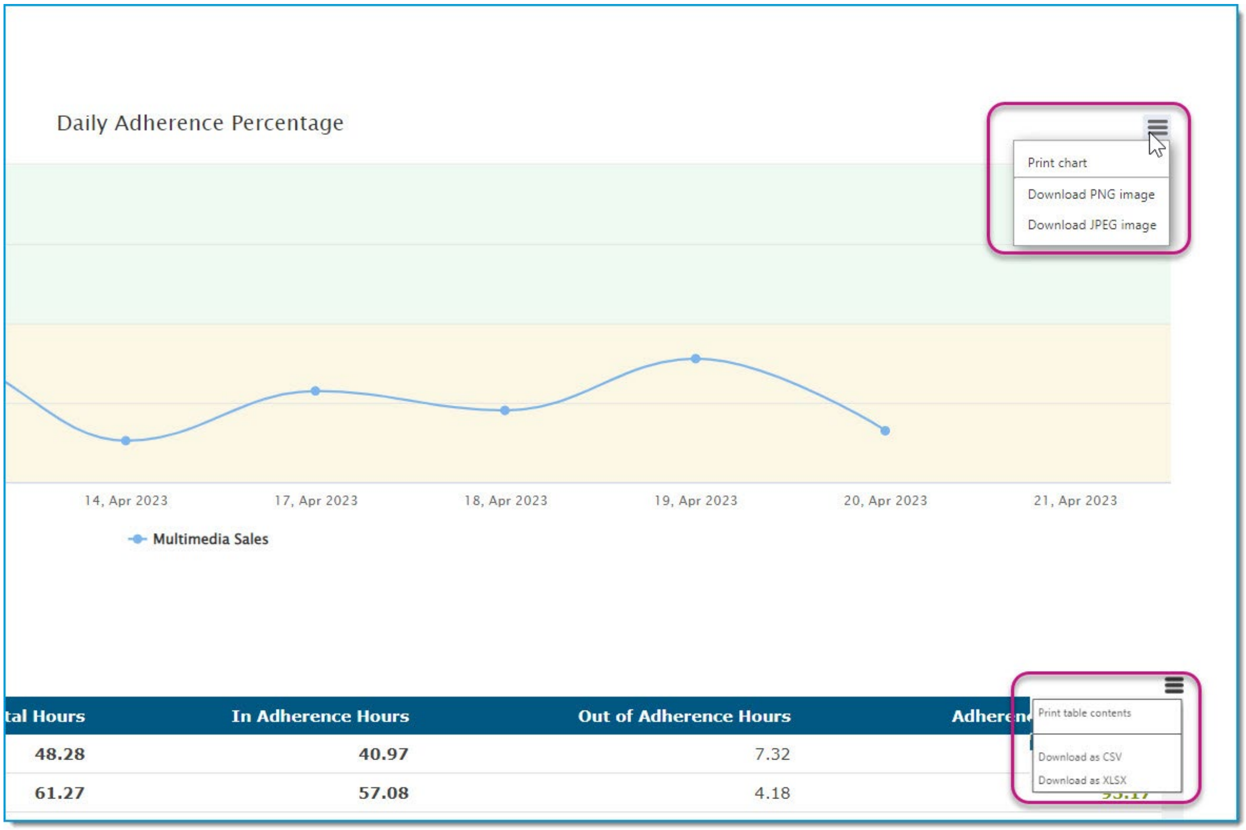
When viewing the list of participants, click the *Include* checkbox in the table to add that person to the graph. Uncheck to remove them from the graph.



For each selected activity, view the top performer and low performer and their respective adherence percentage. The percentage next to their score reflects the difference from the mean.



As with most charts and tables, there is the option to export the data by clicking the hamburger menu above the graph/table.



Appendix 4 GDPR Support

The purpose of this guide is to review the CommunityWFM features for data subject rights, and the processes for submitting and responding to the execution of data subject rights requests.

A Brief Introduction to Data Protection Regulations

In recent years, many legislative bodies have created statutes governing the use and distribution of personal data for users of a web site or application. The original requirements emerged in the General Data Protection Regulation (GDPR) passed by the European Union in 2018, but more recently other countries as well as several individual states within the U.S. have adopted the fundamental tenets of the legislation. As of August 2023, no federal data privacy statute exists in U.S. federal law, but several states (including California, Colorado, Connecticut, Utah, and Virginia) have adopted data protection laws similar to the GDPR.

The purpose of this legislation is to ensure that users of online services are aware of and consent to the use of their personal data and imposes requirements for storage and transmission of personal data to and from the online service.

Data Subjects

Generically, a "data subject" is any user of an online service (web site or web application) that collects or processes personally identifiable information (PII). PII includes any information that can identify a platform user as an individual person and includes (but is not limited to) data points like:

- First and last name
- Dates related to the person like birthdate or hire date
- Credit information
- Contact information (phone numbers, addresses, email addresses, etc.)
- Photos
- Usage data (i.e., activity history in a web application)

Data subject rights may vary between different data protection laws, but generally the list of data subject rights includes:

- The right to be informed about what kind of personal information an organization has about an individual. This right is commonly addressed through online Privacy Policies.

- The right to access personal information. This right is commonly addressed by creating an export of personal data.
- The right to rectification. This means that data subjects can challenge the accuracy of their personal information and ask an organization to update or correct personal information.
- The right to deletion. This is the right that has the most exemptions and exceptions, which means there are several reasons clients and/or CommunityWFM may choose or be required to deny these requests. Just because an individual asks for their personal information to be deleted does not mean that it must be deleted.
- The right to object to direct marketing and automated decision making.
- The right to restriction. This right is a temporary option if there is a dispute about the accuracy of personal information or the legality of using the personal information. If an organization no longer needs the personal information but the data subject needs the organization to keep the personal data without using the data for any other purpose, or the organization is considering whether to grant an objection request, so the organization restricts processing until the decision is made.
- The right to data portability. This right is similar to the right to access except this right is about data subjects being able to get their personal data from one organization in a common, machine-readable format so that the data subject can give that information to another organization for input into the second organization's systems.

Under the GDPR and other data protection laws, data subjects may exercise their rights by submitting a "Data Subject Access Request" (DSAR) to the online provider. The GDPR defines a 30-day time window for fulfilling the request. Other data protection laws may have shorter or longer timeframes to respond to data subject requests.

Fulfilling DSARs in CommunityWFM

CommunityWFM is responsible for helping you respond to data subject requests but is not able to fulfill those requests.

CommunityWFM supports direct fulfillment of the DSARs within the application by a designated "data privacy advocate." Any DSAR that requires administrative intervention will be fulfilled by the advocate, subject to the timeliness requirements of the regulations.

CommunityWFM personnel are not able to:

- Tell you if PII should be deleted
- Tell you if PII should be modified
- Tell you if PII should be restricted

- Assess the validity of a DSAR

Again, the role of CommunityWFM personnel is simply to guide you through the application's interface once you decide how to proceed with the DSAR.

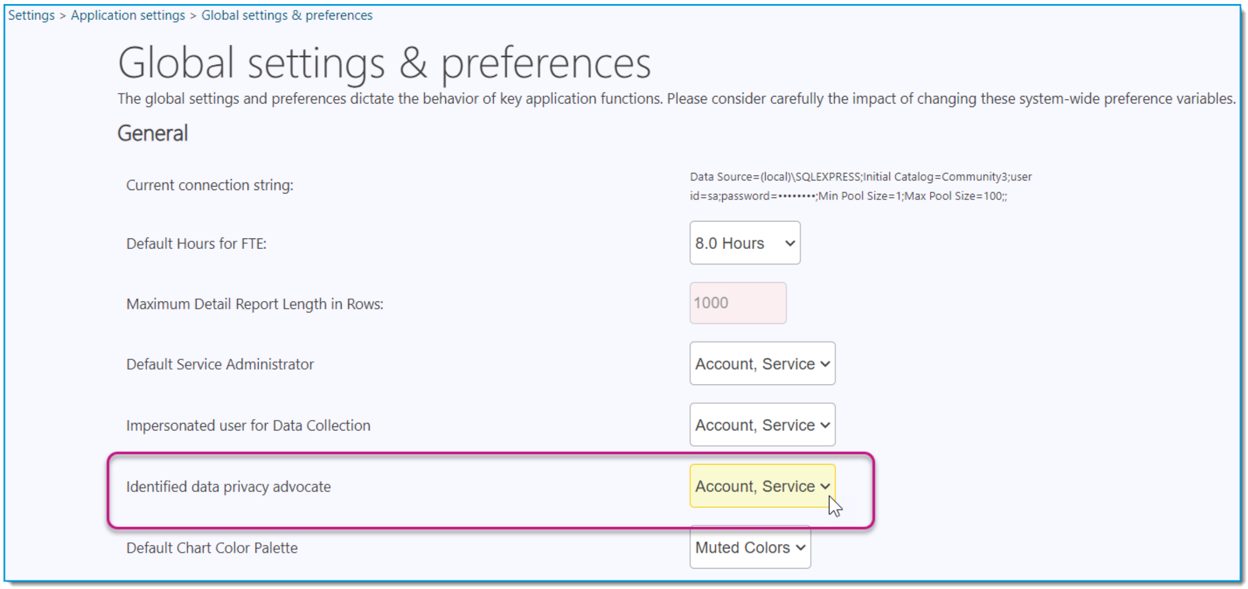
CommunityWFM supports fulfillment of a DSAR by two means:

- End-users may exercise a right in a purely self-service manner; that is, no administrative intervention is required.
- End-users may exercise a right that requires administrative intervention.

In either case, the DSAR is logged in an audit table and available for review. For any DSAR that requires administrative intervention, the application will notify the client data privacy advocate using the established notification channels (such as internal memos, external email gateway, SMS/text messaging, Teams, Slack, Webex, or mobile devices). The responsibility for fulfilling the DSAR rests solely with the advocate (or delegated to another administrator).

Designating a data privacy advocate

CommunityWFM 5.1 supports the ability to designate an administrator-level user as the data privacy advocate. In the ***Global settings & preferences***, select the designated person to respond to and fulfill requests regarding DSARs.

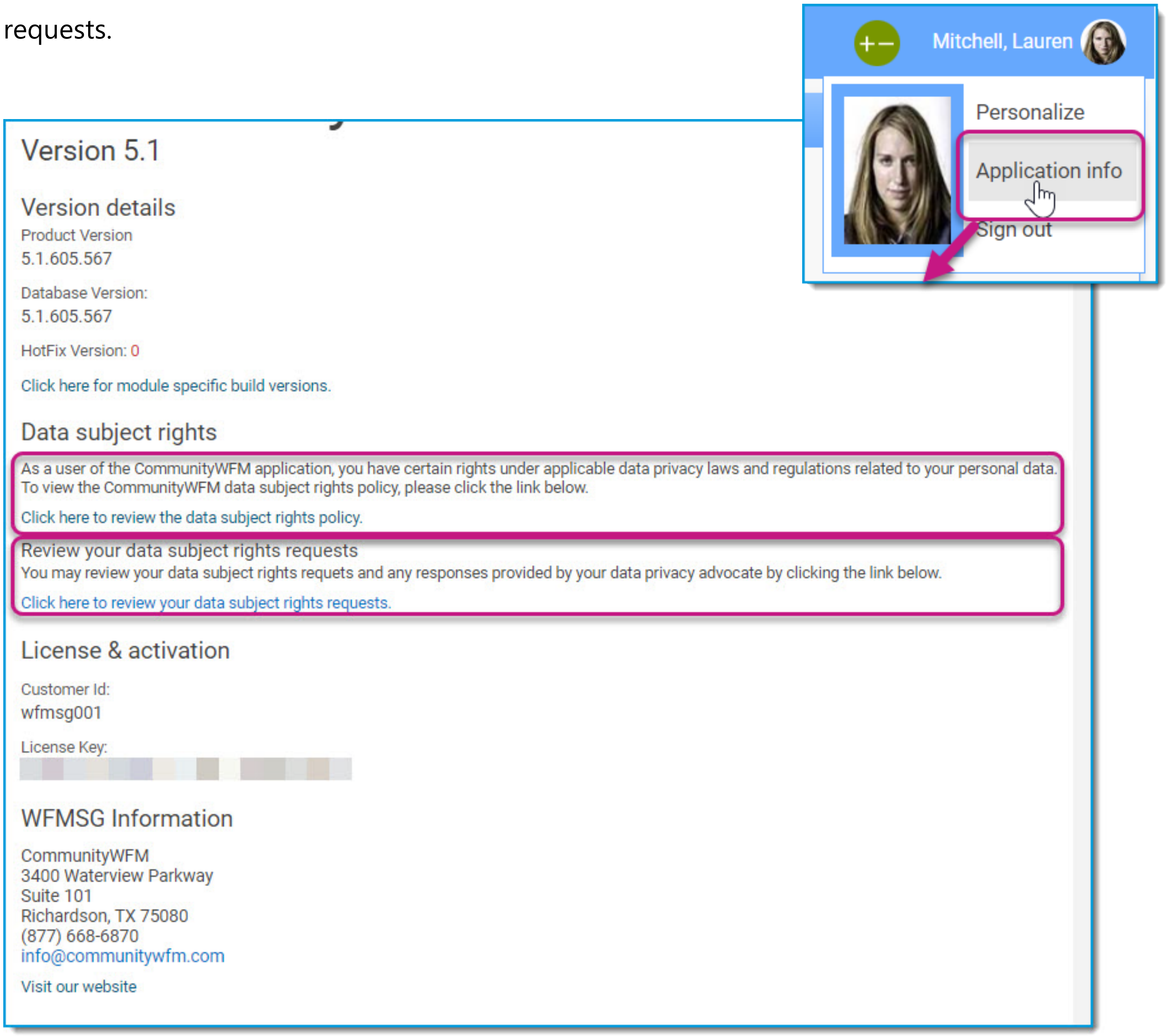


The default for this field is the initial service account and should be changed during training to a designated administrator.

The Data Subject Rights Policy in CommunityWFM

CommunityWFM 5.1 includes the application's data subject rights policy as an embedded part of the user interface. Any user of CommunityWFM may access the policy by navigating to the personal menu (under the username) and selecting the "Application Info" option.

A new "Data Subject Rights" section includes a link to the policy and a link to view previous requests.



The application allows a user to exercise their data subject rights directly from the "Data Subject Rights" page (found by clicking "Click here to review the data subject rights policy"). For more information, see [Additional Resources.](#)

The right to be informed

*What personal information will Your Employer **always** collect?*

- Your first name.
- Your last name.
- Your company employee ID.
- Your company email address.
- Your primary work location.

*What personal information will Your Employer **sometimes** collect?*

- Information related to time off requests, including dates, request type, and comments.
- Information related to accrued time off balances.
- Information related to certain corrective actions or restricted access plans, including supporting documents and comments.

What personal information can you elect to opt in or out of (optional personal information)?

- Your photo used within the application.
- Your personal telephone number(s) used for text message notifications.
- Your personal email address(es) used for email notifications.
- Your mobile device information, including operating system, device ID, device model, and manufacturer if you are licensed for and elect to use the Community Everywhere mobile application for iOS and Android devices.

How does CommunityWFM use any of the above information listed above?

- Normal application and business functions, including scheduling, reporting, and notifying users of important application-related events.
- Notifications of important system events may be shared with 3rd party gateway providers (Teams, Slack, Twilio) and may include first and last name, time off approval status, and restricted access information.

Additional Information

This right provides the necessary transparency between CommunityWFM and end-users of the application by defining what data is collected and how it is used. The application *requires the information above to perform the core functions related to scheduling and reporting for users.*

The right to access

You have the right to access the information that has been collected for you as an application user. If you wish to access your personal data, please click the link below and provide the relevant information.

Click here to access your personal information. ***(For illustration only. Link is active on the webpage).***

Additional Information

The right to access allows data subjects to review all the personal data that the online service has collected about them. In CommunityWFM, this includes the above stated information, in addition to the skill assignments and custom fields defined at the time of installation for users. Note that this is a self-service DSAR. The result is a page containing read-only values for all agent properties, similar to the current "Profile" page accessible to agents.

The right to rectification

You have the right to request a correction to any inaccurate data collected by CommunityWFM as entered by your employer. If you wish to request a change to your personal data, please click the link below. You must provide exact details regarding the data inaccuracy as well as the corrected values. Note that your request should be satisfied within 30 days after you submit your request.

Click here to rectify your personal information. ***(For illustration only. Link is active on the webpage).***

Additional Information

The right to rectification allows users to submit requests for changes to their personal data, either because the data changed or because it is inaccurate. Exercising this right requires that the user provide specific descriptions of the inaccurate values as well as the correct values. Note that this request requires intervention by the data privacy advocate in order to fulfill the request.

The right to erasure

Your employer does not guarantee the right of your data to be deleted at any time. The application retains your required personal information for historical reporting and budgeting purposes.

However, you may elect to have your data anonymized once you are no longer a user of the application. In addition, you may elect, at any time, to have any optional personal information removed from the application's database. Note that your request should be satisfied within 30 days after you submit your request.

Please refer to the following options related to data erasure.

Click here to indicate that you would like your personal data anonymized upon cessation of employment. ***(For illustration only. Link is active on the webpage).***

Click here to remove all optional personal information. ***(For illustration only. Link is active on the webpage).***

> ***Additional Information***
>
> *The right to erasure conflicts with the need for historical retention of schedule and adherence data for aggregate reporting purposes, the ability to provide our services, and sometimes with other laws. Therefore, neither clients nor CommunityWFM support full erasure of any user's data as a result of a DSAR.*
>
> *However, CommunityWFM will support two options to satisfy the right to erasure. Briefly, anonymizing a user's data sufficiently obfuscates the user's data in a way that forever prevents anyone from identifying the actual person represented by that user. See* ***Additional details on CommunityWFM anonymization algorithms.*** *Note that data anonymization requires intervention from the data privacy advocate.*
>
> *Removing all personal data will immediately remove any of the optional data points described under the Right to be informed rule, including user photos, any device information (mobile device, phone numbers, etc.) and any personal email addresses.*
>
> *Note that removing all optional personal information does* ***not*** *require intervention from the data privacy advocate.*

The right to restrict automatic data processing

Your employer does not guarantee the right to restrict automatic data processing. The fundamental purpose of the application is to automate schedule generation as well as manage (approve or deny) time off requests. In the interest of efficiency, the application implements automated processes for achieving these results. Therefore, application users are not eligible for restricted data processing activities.

The right to data portability

You have the right to retrieve in a machine-readable format the information that your employer has collected for you as an application user. The application allows you to export your personal data into a comma-separated values (CSV) file format. However, the data export restricts access to confidential or proprietary company information.

Click here to request your personal information. ***(For illustration only. Link is active on the webpage).***

> ***Additional Information***
>
> *The right to data portability theoretically allows a user's data to be moved from one platform to another. While that is not a practical reality for the type of data collected for any user, the application supports the right to retrieve the personal information in a CSV file. The application exports all information found in the "Right to be informed" section to a CSV file using the system assigned agent id as a file name. Note that a warning message will appear alerting the user that, once the data is exported, CommunityWFM is no longer responsible for protecting it.*
>
> *Note that exporting the user's personal information requires intervention from the data privacy advocate. This is to ensure that the exported file does not contain confidential information.*

The right to object under certain conditions

You have the right to object to the processing of personal data within CommunityWFM by your employer. However, in order to function the application must process the required personal information described above. Note that CommunityWFM does not distribute any personal data to direct marketing organizations.

The right to restrict processing

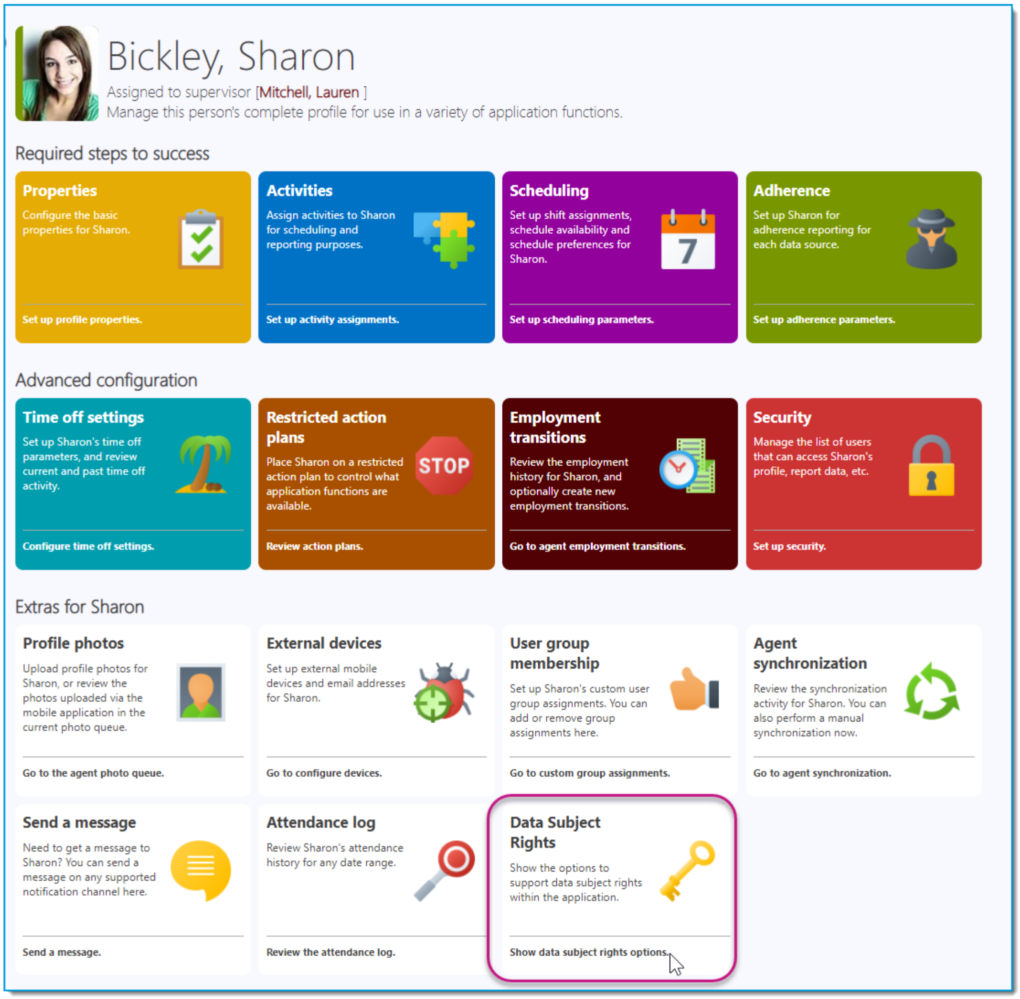
Your employer does not explicitly guarantee the right to restrict processing. If you feel that you are entitled to request the restriction of data processing, please contact your data privacy advocate. Your system's data privacy advocate is **WFMSG, Admin A**.

Additional Information

The right to restrict processing is a "manual" process within the application, and thus the data subject rights policy points users to the data privacy advocate.

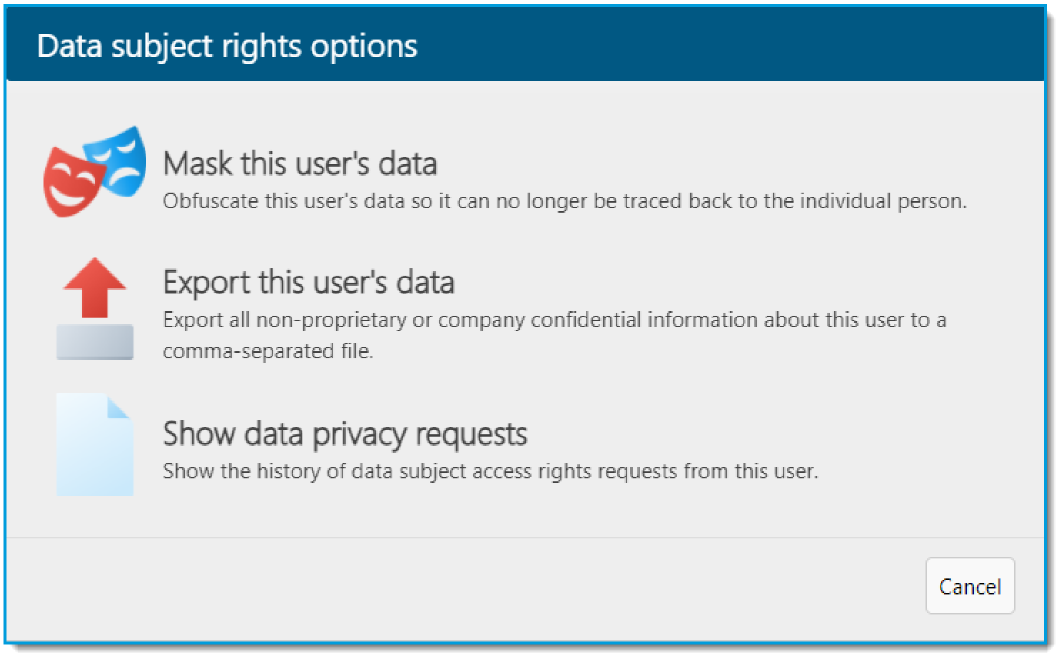
User profile enhancements

Community 5.1 offers new features to facilitate compliance with GDPR by making data subject rights a first-tier element of the user profile. Note the new feature tile labeled "Data Subject Rights" that will serve as a launch point for additional features related to data subject rights.



Responding to a request

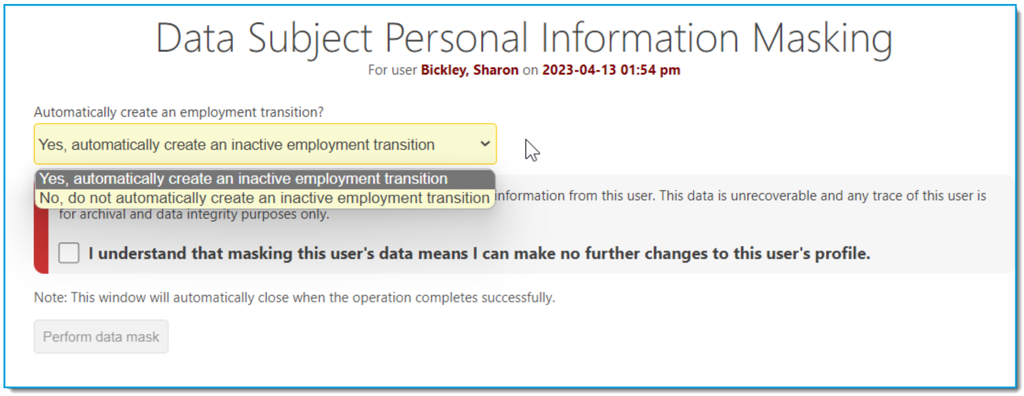
When you receive a notification that a user has made a request, navigate to the person's personal profile, select ***Show data subject rights options,*** then select from the options.



Mask this user's data

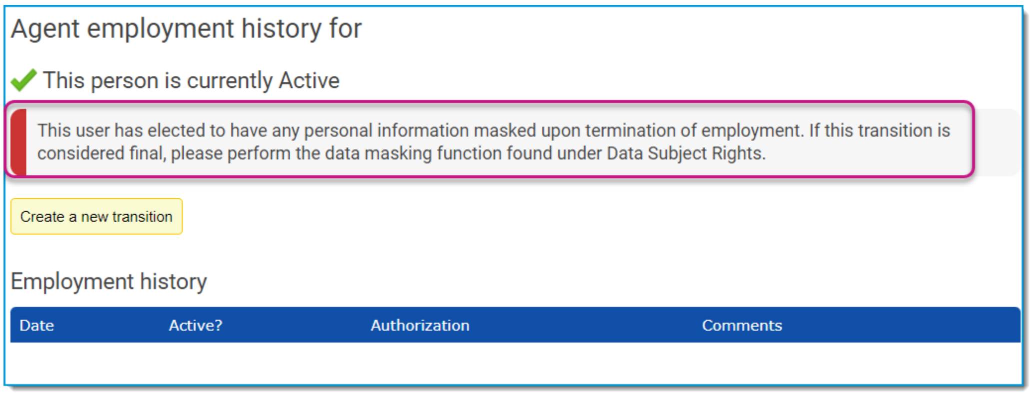
Masking user data with full anonymization is permanent and cannot be reversed

This option allows the data privacy advocate to scrub or mask the user's data to prevent identification, subject to the rules of the selected in the Global settings & preferences. When the user clicks "Mask this user's data," the following dialog window appears:



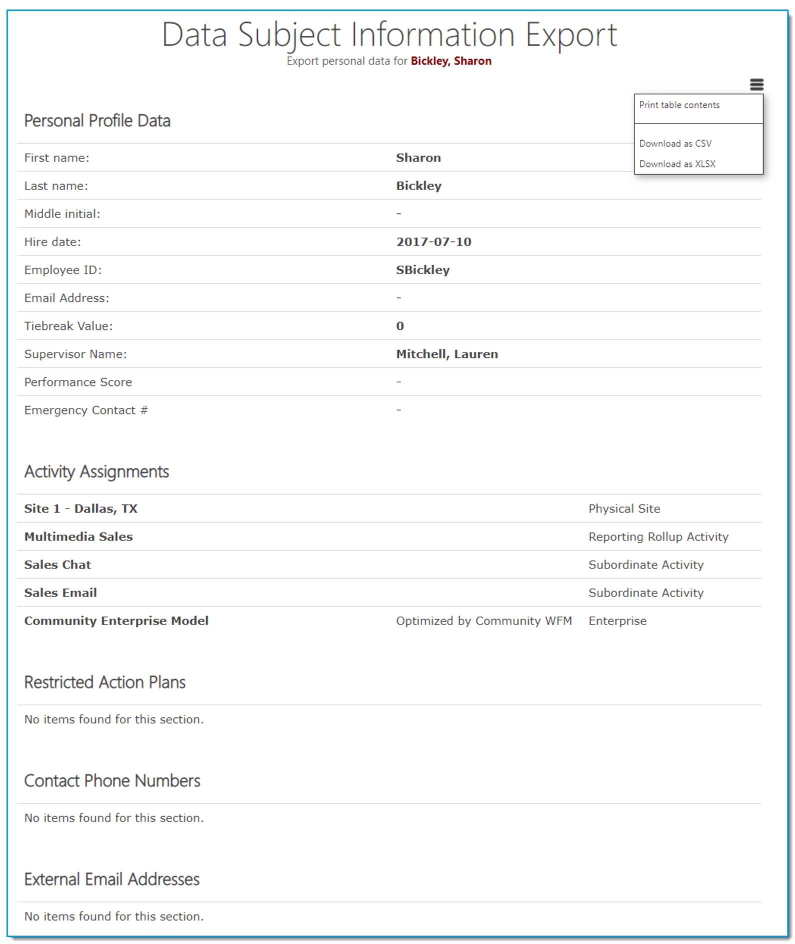
See Data Masking Algorithms for details on the various data masking algorithms available in the application.

If an agent requests that their data be masked at the end of employment, the request is automatically marked as complete, and when creating an employment transition, you will see a message regarding the request.



Export this user's data

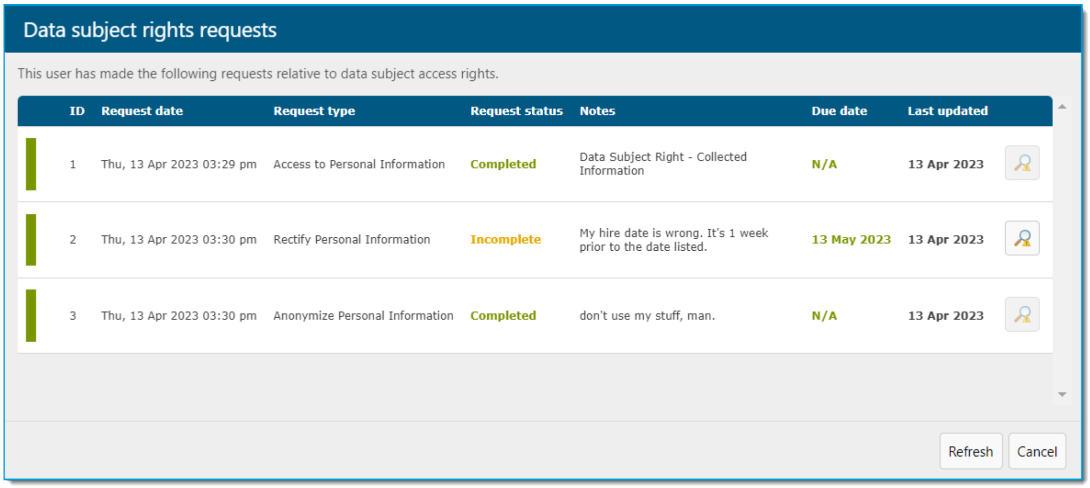
This option exists to facilitate a user's right to data portability and requires that the privacy advocate export the information to a file (as described earlier) and provide it to the requesting user within 30 days of the request. **Note that the 30-day response period is dictated by the applicable privacy laws and is a configurable parameter within CommunityWFM.** To change the response interval, a technical services representative will need access to the application database. The following screenshot depicts the export page with two options for exporting – "Download as CSV" and "Download as XLSX." The CSV download creates a simple text file with no formatting while the XLSX download creates a formatted Excel file.



Show data privacy requests

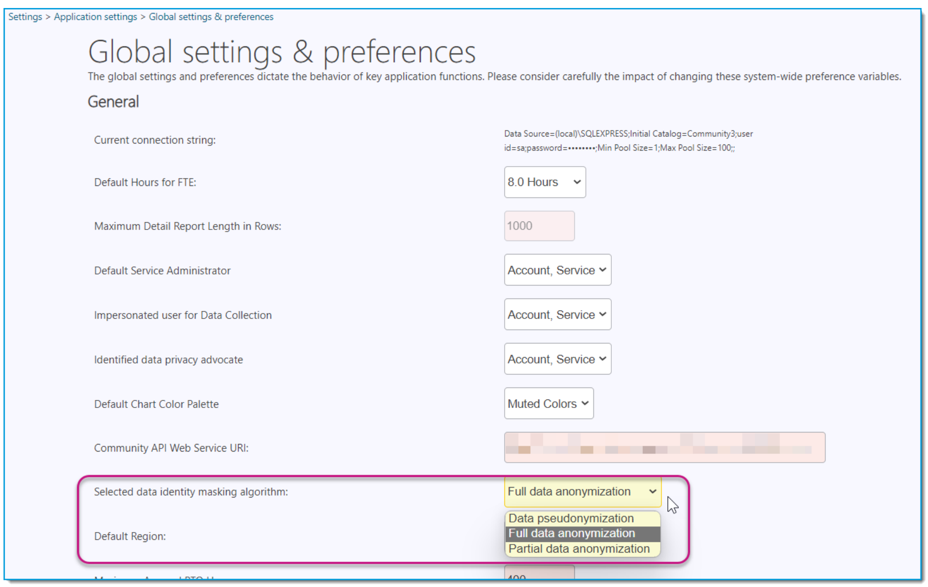
This option exists to allow the privacy advocate to review DSARs for a specific user. CommunityWFM will automatically create data privacy requests when a user clicks any link or submits any request while exercising any of the data subject rights described earlier. This includes exercising those rights that do not require intervention from the data privacy advocate.

Clicking "Show data privacy requests" displays this dialog box:



Data Masking Algorithms

CommunityWFM supports a variety of data masking algorithms. Note that the data masking algorithm is a global setting and will apply to all data masking operations for all users.



Full Anonymization

This algorithm scrubs the personal data for any information that may serve as an identifier to a user.

Data Property	Scrubbing Method
First Name	Random 10 characters
Last Name	Random 10 characters
Middle Initial	Blank / NULL value
Hire Date	01 Jan 1900
Supervisor Assignment	No assignment – NULL value
Tiebreak Value	0
Email Address	Blank or NULL value
Title	Blank or NULL value
Time Zone	NULL value
Custom Profile Properties	**All** returned to blank or NULL value

Other properties

Note that activity assignments must be retained in order to satisfy reporting requirements. However, the application permanently deletes the following additional data points with full anonymization:

- Schedule preferences
- Schedule availability
- User group assignments
- Pending time off requests
- Device information (mobile numbers or mobile device IDs)
- External email addresses
- Restricted action plan details
- Schedule transactions (swaps, takeaways, giveaway, etc.)

- Agent synchronization logs, membership (as a source or direct target)
- PTO calendar participation
- ASAP participation
- Existing notifications, messages, or pop-up reminders
- Connection to data source (optional – this may be configured to use an anonymized login for future adherence reporting)
- Schedule template assignments
- "To Do" items list

Additional notes

Full anonymization will ***prevent any further edits to the user account (profile)*** to guarantee that the user can no longer have access to the system and no user (not even a super user or administrator) can "reactivate" an anonymized user.

The administrator performing the data masking function has the option to automatically create an employment transition to inactive to "deactivate" the user.

There is an audit trail that records who performed the masking and when. This is the only place in the system that retains the agent's name.

Partial Anonymization

This algorithm provides a similar degree of obfuscation to the full anonymization algorithm but leaves the user profile in an editable state.

Pseudonymization

This algorithm scrubs the data but in a way that reduces, but does not eliminate, the ability to link the data back to a user. This algorithm leaves the user profile in an editable state.

The properties and method of scrubbing the data are as follows:

Data Property	Scrubbing Method
First Name	The user's system assigned User ID
Last Name	The user's system assigned User ID
Middle Initial	Blank or NULL value

Hire Date	Does not change
Supervisor Assignment	Does not change
Tiebreak Value	Does not change
Email Address	The user's system assigned User ID concatenated with the existing email domain address
Title	Blank or NULL value
Time Zone	Does not change
Custom Profile Properties	All returned to blank or NULL value

Other properties

Note that activity assignments must be retained in order to satisfy reporting requirements. However, the application permanently deletes the following additional data points as a result of pseudonymization:

- User group assignments
- Pending time off requests
- Device information (mobile numbers or mobile device IDs)
- External email addresses
- Restricted action plan details
- Schedule transactions (swaps, takeaways, giveaway, etc.)
- Agent synchronization logs, membership (as a source or direct target)
- PTO calendar participation
- ASAP participation
- Existing notifications, messages, and pop-up reminders

Additional notes

Pseudonymization will leave the user profile in an editable state, similar to partial anonymization, so that, if desired, a change to the profile is available.

Additional Resources

If you want to read the complete GDPR text:

[Complete GDPR Text]

If you want to read the complete GDPR compliance guide:

[Complete Guide to GDPR Compliance]

If you want to read specifically about data subject rights:

[GDPR Rights of the Data Subject]