**Business Requirements Document (BRD)**

**Project Title**

**Extraction & Reporting of Activity‑wise Schedule Adherence %**

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**Author:**

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**1. Executive Summary / Purpose**

This project aims to enable **automated extraction and reporting of Schedule Adherence percentages broken down by activity code** (e.g., Break, Lunch, Meeting, Wrap‑Up) from the existing Workforce Management (WFM) tool. The output will feed dashboards and operational reports, providing real‑time visibility into adherence at the granularity required for data‑driven staffing and coaching decisions.

**2. Business Objectives & Success Criteria**

|  |  |  |
| --- | --- | --- |
| **ID** | **Objective** | **Success Metric** |
| OBJ‑1 | Provide supervisors with near real‑time activity‑level adherence insights | Dashboards refresh ≤ 15 min of data capture |
| OBJ‑2 | Improve overall schedule adherence | ↑ Adherence by ≥ 3 pp within 2 months of go‑live |
| OBJ‑3 | Reduce manual effort in report generation | 100% automation; eliminate ≥ 4 hrs/week of analyst effort |
| OBJ‑4 | Support data‑driven coaching | Coaching sessions reference activity‑level data in ≥ 90% of cases |

**3. Background & Current State**

* **Existing Tool:** *<name/version>* provides holistic Schedule Adherence% but lacks breakdown by activity code.
* Supervisors currently export raw logs to Excel and manually pivot the data, introducing delays and errors.
* Previous attempts to automate were limited by API constraints and inconsistent activity codes.

**4. Project Scope**

**4.1 In‑Scope**

* Extraction of schedule and actual timestamp data at the activity level for all front‑line agents.
* Calculation logic for Adherence % per activity:  
  Adherence% = (Actual Time in Activity ÷ Scheduled Time in Activity) × 100.
* Storage of extracted data in the **uvwScheduleAdherenceData** SQL table (or equivalent).
* REST API / stored procedure to serve summarized data to reporting layers.
* Integration with existing Power BI‑style dashboard.

**4.2 Out‑of‑Scope**

* Changes to agent scheduling policies.
* Historical back‑loading beyond 12 months.
* Non‑contact center departments.

**5. Stakeholders & RACI**

|  |  |  |
| --- | --- | --- |
| Role | Name | Responsibility |
| Project Sponsor |  | Approve budget & scope |
| Product Owner |  | Define requirements, accept deliverables |
| WFM Analyst |  | SMEs for schedule data |
| BI Developer |  | Build ETL & dashboards |
| IT Security |  | Review access controls |
| QA Lead |  | Test extraction accuracy |

**6. Functional Requirements**

|  |  |  |  |
| --- | --- | --- | --- |
| ID | Requirement | Priority | Acceptance Criteria |
| FR‑1 | Extract schedule & actual activity records via WFM API every 15 min | Must | Jobs run with ≤ 1 min variance |
| FR‑2 | Normalize activity codes (mapping table) | Must | 100% records mapped |
| FR‑3 | Calculate Adherence% per agent, per activity, per interval (15‑min) | Must | Values match manual calc within ±0.1 pp |
| FR‑4 | Aggregate to daily, weekly, monthly views | Should | Aggregations available via API |
| FR‑5 | Role‑based access: Supervisor, Manager, Admin | Must | Only authorized users see their teams |
| FR‑6 | Exception handling & alerting on job failure | Must | Email/Teams alert within 5 min of failure |
| FR‑7 | Export capability (CSV/PDF) | Could | Users can download filtered results |

**7. Non‑Functional Requirements**

|  |  |  |
| --- | --- | --- |
| ID | Requirement | Metric |
| NFR‑1 | Performance | API response ≤ 2 s for 95th percentile |
| NFR‑2 | Availability | 99.5% monthly uptime |
| NFR‑3 | Security | Data encrypted in transit (TLS 1.2+) & at rest (TDE) |
| NFR‑4 | Scalability | Support doubling of agent count without redesign |
| NFR‑5 | Audit | All data extracts logged & retained 1 year |

**8. Data Requirements & Definitions**

|  |  |  |
| --- | --- | --- |
| Field | Source | Description |
| EmployeeNo | WFM | Unique agent identifier |
| EmployeeName | WFM | Agent display name |
| ActivityCode | WFM | Raw code (e.g., BRK, LUN) |
| ActivityDesc | Mapping | Normalized description |
| ScheduledStart | WFM | Scheduled start time |
| ScheduledEnd | WFM | Scheduled end time |
| ActualStart | WFM | Actual start time |
| ActualEnd | WFM | Actual end time |
| Adherence% | Calculated | (Actual Duration ÷ Scheduled Duration) × 100 |

**9. Benefits**

1. **Operational Efficiency:** Eliminates manual Excel processing, saving ~200 analyst hours annually.
2. **Real‑Time Coaching:** Supervisors can address adherence issues during the shift, improving agent performance.
3. **Targeted Root‑Cause Analysis:** Identifies specific activities (e.g., long Wrap‑Up) driving non‑adherence.
4. **Cost Savings:** Better adherence can reduce overtime and staffing overhead, projected savings of ₹ XX lakh/year.
5. **Compliance & SLA Alignment:** Accurate adherence tracking supports contractual SLA reporting for clients.
6. **Employee Engagement:** Transparent metrics foster fair feedback and recognition programs.

**10. Assumptions**

* WFM API provides required activity‑level data with timestamp granularity.
* Activity code mappings are stable and maintained by WFM team.
* Network connectivity between WFM servers and SQL environment is reliable.

**11. Constraints**

* API rate limit of 500 calls/hour.
* Project must align with broader Data Platform upgrade scheduled for Q3 FY25.
* Budget capped at ₹ X lakh.

**12. Risks & Mitigations**

|  |  |  |  |
| --- | --- | --- | --- |
| Risk | Impact | Probability | Mitigation |
| API schema changes | High | Medium | Version control & automated tests |
| Data quality issues | High | High | Implement validation rules & alerts |
| Stakeholder adoption | Medium | Medium | Early demos & training |
| Timeline slippage | Medium | Low | Agile sprints, buffer time |

**13. Dependencies**

* WFM vendor to enable API endpoint.
* Security team to approve firewall rules.
* Dashboard upgrade project for final visuals.

**14. Acceptance Criteria**

* ≥ 98% of activity records processed without error for 30‑day pilot.
* Dashboard refresh latency ≤ 15 min in UAT.
* Sign‑off from Product Owner & WFM Manager.

**15. High‑Level Timeline & Milestones**

|  |  |
| --- | --- |
| Milestone | Target Date |
| Requirements Finalized | 03 Jun 2025 |
| Development Start | 10 Jun 2025 |
| UAT Complete | 22 Jul 2025 |
| Production Go‑Live | 05 Aug 2025 |
| Post‑Implementation Review | 05 Sep 2025 |

**16. Glossary**

* **Adherence%** – Ratio of actual time spent vs scheduled time in a given activity.
* **WFM** – Workforce Management system/tool.
* **pp** – Percentage points.

**17. Approval Sign‑Off**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Title | Signature | Date |
|  |  |  |  |

**Next Steps:** Review this draft with stakeholders, add missing names, activity mappings, and refine metrics.