MT SaaS Workforce Management

Tracking Guide

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Contents

About this guide

The *Workforce Management Tracking Guide* discusses Workforce Management Tracking which includes functionality for monitoring queue performance through Queue Analytics, and also monitoring adherence, workload, and the schedules of employees in an organization.

Intended audience

This guide is designed for:

- Anyone responsible for monitoring work queue performance.
- Anyone responsible for monitoring the adherence of employees to their scheduled tasks.
- Anyone responsible for the workload or schedules of employees.

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Document revision history

Revision	Description of changes
1.02	Updates for HFR7: • Minor updates.
1.01	Updates for **WFO 15.2 610**: In *Configure trends in Queue Analytics*: • Added step to include the new *Trend calculation based on Working Hours only* checkbox.
1.00	Initial publication

Chapter 1

Queue Analytics

Queue Analytics allows you to track the current performance of your queues against your forecast and the defined service goals. Not only can you view live data from your automatic call distributor (ACD), you can also review past performance across a range of statistics.

While monitoring your queues, if there is a large discrepancy between what was forecast and the actual data coming in, you can choose to reforecast. The new forecast is generated based on the trend data, which is a projection of future performance based on recent actual activity.

Explore UI

Topics

Track queue performance

You can track the current performance of your queues against your forecast and the defined service goals. You can also view current data or review past performance across a range of statistics.

There are several statistics that are generated for a queue, depending on its type. You can select which statistics to display for a single or multiple queues in a campaign for a specified period. By default, all data is displayed in the campaign time zone. You can change the time zone so that you can view data in your local time zone.

Trends can be enabled on statistics, which is a projection of future performance based on recent actual data. If there is a large discrepancy between the trend data and the forecast, you can generate a new forecast based on the trend data.

Show Me

Before you begin

Create a view, which defines the statistics displayed on the Queue Analytics screen.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. From **Campaigns**, select the campaign you want to view the data for.
3. To view queue statistics for a date range or scheduling period, select **Dates** and do one of the following.
   - To choose from the list of scheduling periods associated with the selected campaign, select **Scheduling period**.
   - To select a date range using the date picker, select **Dates**.

     Use the **Period** menu as a quick method of finding a period relative to the current day, for example, This Month, Today.
4. From **Queues**, select a single queue or multiple queues to track.

   Only queues associated with the selected campaign are available for selection.
5. From the **Statistics View** menu, select one the predefined sets of statistics to display.

   Alternatively, define a new statistics view by selecting **New Statistics View**.
6. To view data only for the hours of operation rather than the full 24 hours, select **Working Hours Only**.
7. From the Display Options, select what elements to add to the screen.
   - **Data**: display the data as numbers directly below the chart.
   - **Summary**: displays a summary view of the selected statistics for the campaign.
   - **Trend**: for some statistics, you can display a projection of future performance based on actual data.
8. Use the **Day/Week/Period** view selector to choose the zoom level for the data.

   When the Day or Week zoom level is selected, you can use the **Jump To** button to select a specific day or week.

9 Edit the actual data for any statistic by clicking the corresponding chart or data table.

If you select **Automatic details pane**, clicking the chart or data table opens the data tab on the details pane.

Related topics

Editing queue data, page 9

Viewing data for multiple queues, page 9

Reload or recalculate statistics, page 11

Daylight savings, page 11

Define a statistics view, page 13

Configure trends in Queue Analytics, page 18

Reforecast based on trend data, page 21

Editing queue data

As you examine the queue data, there may be a need to edit the actual data for some of the statistics. This situation could be because of a large spike in the data or perhaps there is data missing for some reason. If Automatic Details Pane is selected, clicking the chart opens the data tab on the details pane at the corresponding interval. Data can be edited directly on the data tab or if there are number of statistics to edit, open the data in a popup.

When editing data, the following rules apply:

- You must only have a single queue selected
- You can only edit actual data for each statistic
- You can only add data if the statistic is appropriate for the media type of the queue
- You cannot add data to intervals in the future

Related topics

Track queue performance, page 8

Viewing data for multiple queues

Viewing multiple queues together allows you to compare the performance of up to eight queues at a glance. If a queue is having performance issues, it shows up when compared with the other queues.

An aggregated chart shows the combined data for each statistic in the selected statistic view. This chart can be expanded, when you have selected eight queues or less, to show the individual performance data for each queue on the chart. Selecting any point on a line on the chart displays the individual value for that statistic.

All data in the summary table, grid and in the details pane for the selected queues is aggregated.

Related topics

Track queue performance, page 8

User or campaign time zone in Queue Analytics

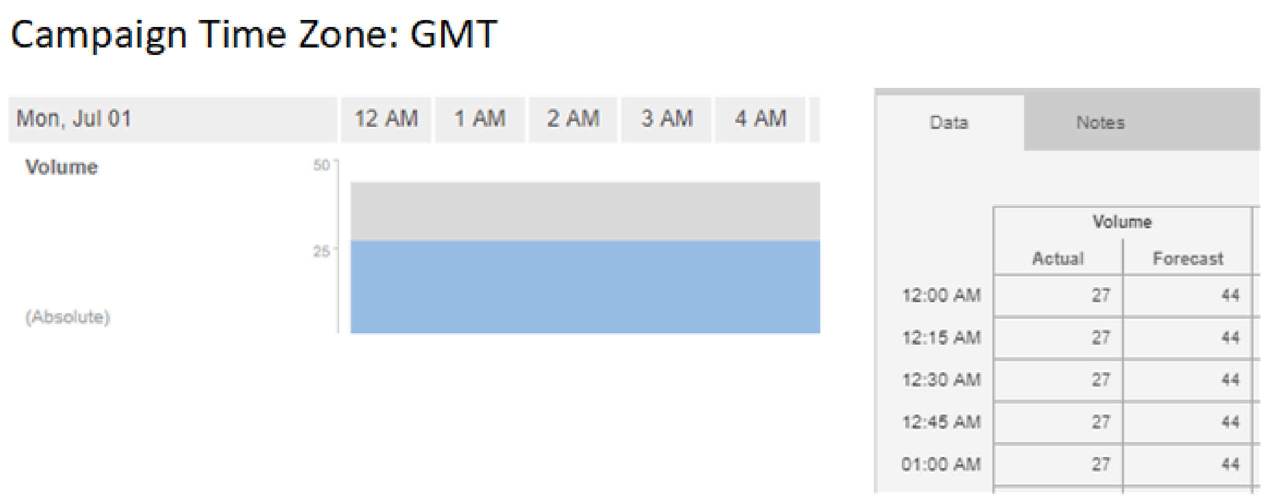
A campaign is created with a time zone specified. When you view the performance of queues within a campaign, you can choose to view the data in the campaign time zone or your own time zone.

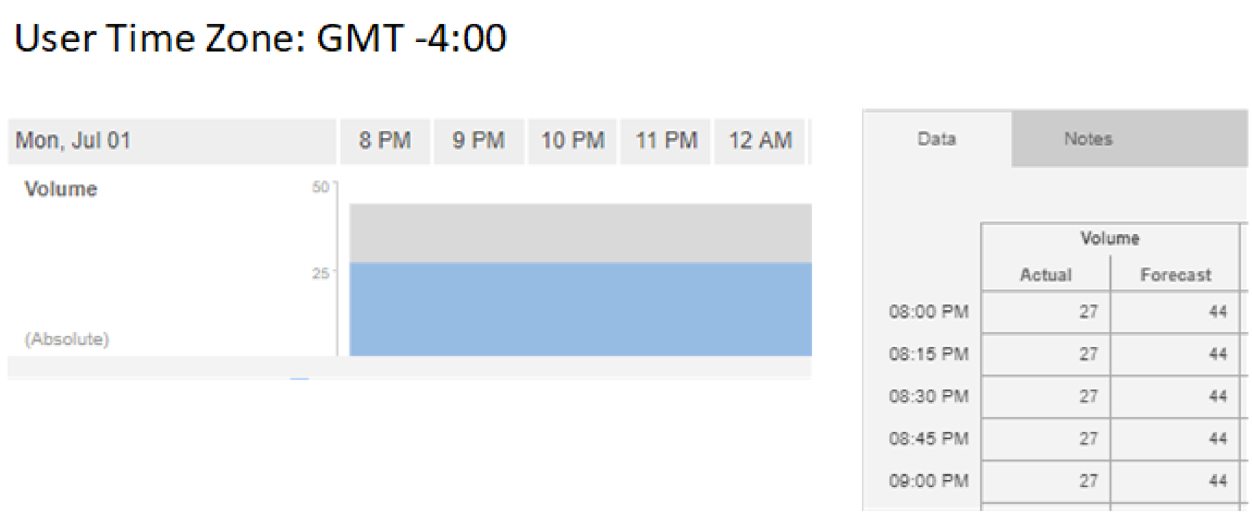
When you switch time zones, depending on the zoom level, the days in the chart and data tables do not change. They stay as they were for the campaign time zone. If the switch to the user time zone takes you into a previous day, the day stays the same but the hours from the previous day are included.

In the following example, the campaign time zone is GMT and begins at 12AM on Mon 1 July and the user time zone is GMT -4:00. Although switching to the user time zones takes you into the previous day, Sunday is not shown on the chart or summary table. The hours from what is Sunday in the user time zone are included and shown under Monday.

Related topics

Track queue performance, page 8





The following table shows what to expect on the summary table, chart, and data tables when you switch between campaign and user time zones.

Summary	• In day view, the first day shown is Monday, the previous day is not included although the hours are shown. • In week view, the date is shown from the first, even though the time zone shift has included data from the 30th.
Charts	• In day view, the first day shown is Monday, the hours for the previous day are shown. • In week view, the date is shown as the 29th, the previous day is not included. • In period view, the previous day is not included.
Data	• In day view, all hours are shown, there is no day shown at this view • In week view, the day is shown along with the hour, data from the previous day does include the day Sunday. • In period view, the day and date from the previous day is shown. Sun, Jun 30 08:00 PM.

Related topics

Track queue performance, page 8

Reload or recalculate statistics

When viewing queue statistics data in Queue Analytics, there are two methods of ensuring you are looking at the most recent data - Reload and Recalculate Statistics.

Reload

Reload fetches the latest actual data from your ACD. There is an auto-refresh rate for Queue Analytics statistics that you can set in your Workforce Management user preferences. Clicking Reload refreshes your data between scheduled refreshes.

Recalculate Statistics

Recalculate Statistics recalculates the data, including any changes made in the Calendar or the active forecast.

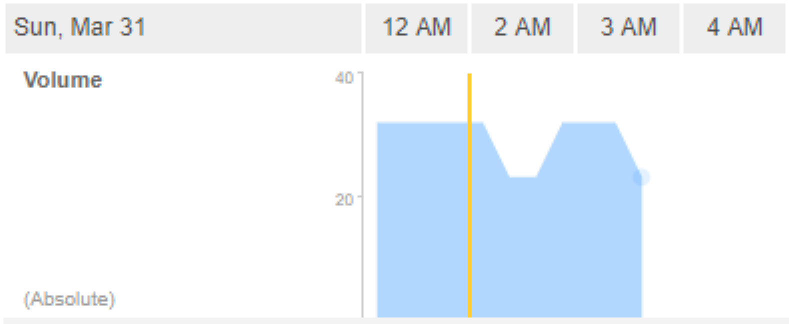
Related topics

Track queue performance, page 8

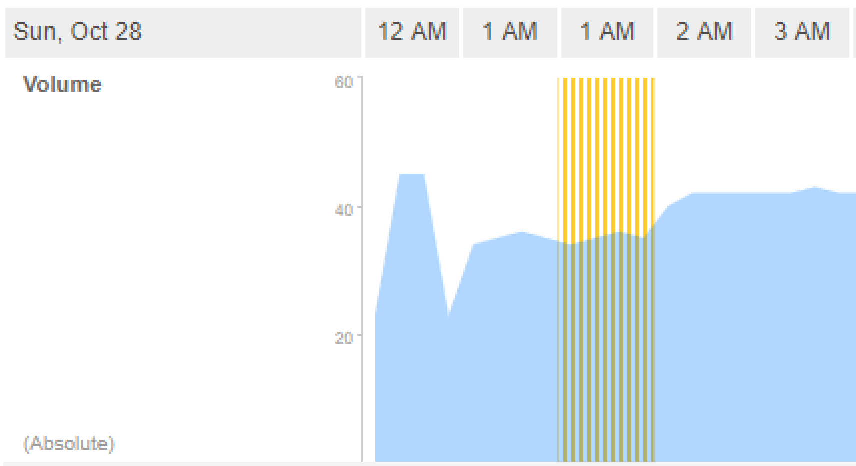
Daylight savings

Adjustments made for daylight savings can cause gaps or duplicate entries to appear in the data stream for a queue. The gaps or extra hours are indicated on the chart by the yellow lines.

When the time jumps forward, there can appear to be a gap in the data stream.



When daylight savings time goes back to standard time, some hours can appear to get repeated in the data stream.



Related topics

Track queue performance, page 8

Define a statistics view

A view is a group of statistics that are displayed together on the Queue Analytics screen. Views allow you to create groups of the most meaningful statistics to you, and see them together in one place. You can create multiple views, with different combinations of statistics, which are selectable from the Queue Analytics screen. The groups you create can be made private, so only you can use the view, or public so they are available to others users.

There are multiple statistics available for each queue, some of which depend on the media type of the queue. For each statistic, several display options are available.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. From the **View** menu, select New Statistics View.
3. Complete the **Name** and the optional **Description** fields.
4. Set the sharing options for the view, then select **Next**.
    - To make the view only available to you, select **Private**.
    - To make the view available to others in your organization, select **Shared**.
5. Select the statistics to include in the view, then select **Next**.

    Selecting the parent node of a statistic, selects all display options for that statistic. Expand the node for a statistic to select specific display options.
6. If you want to change the order the statistics appear on the screen, use the filter to sort, or drag and drop the statistics into place. When you are happy with the order and the statistics chosen, select **Create View**.

Related topics

Edit a statistics view, page 17

Statistics available to Queue Analytics, page 13

Statistics available to Queue Analytics

There are several statistics available to you when you create a statistics view. Depending on the statistic, one or more of the following are available: actual data, forecasted data, or required data. The required data, is generated from the service goals.

The statistics available to a queue depend on the media class it belongs to. The media classes are:

- **Immediate** (Imm): phone, chat, voice-over-IP, and face-to-face.
- **Deferred** (Def): email, fax, operations, callback, social post, and resolution.
- **Project** (Pro).

Statistic	Description	Queue Type		
		Imm	Def	Pro
Volume	Number of work items arriving per interval, for example, phone calls, emails.	✓	✓	✓
Activity Handling Time	Average time it takes to handle a piece of work.	✓	✓	✓
Service Level	Service level set for the queue.	✓	✓	✓
Net Staffing	Allows managers to know how much they are short or surplus on staffing, allowing them to manage VTO and Shift requests efficiently. Calculated by subtracting the Required FTEs from the Adjusted FTEs. This result is then divided by the ratio of Adjusted FTEs to Adjusted Staffing.	✓	✓	
Staffing	Number of agents qualified to work on a particular queue for a particular interval. When viewing an aggregation, it is the number of hours.	✓	✓	✓
Average Speed to Answer	Average time it takes to respond to a call. **Actual** data comes from the ACD.	✓	✓	
Abandons	Number of connected calls terminated by the caller before they are answered. Actual data comes from the automatic call distributor (ACD). The **Forecasted** data is generated from the forecasted volume and the percentage value for abandons. The percentage value for Abandons is set in the service goals.	✓		
Volume Handled	Consists only of actual data (for example, no forecasted), and is used for calculating weighted averages.	✓	✓	✓
Full Time Equivalents	Full Time Equivalents (FTE) is calculated from the number of hours divided by the hours in a full working week. The hours of several part-time employees may add up to one FTE.	✓	✓	✓

Statistic	Description	Queue Type		
		Imm	Def	Pro
Adjusted Full Time Equivalents	Adjusted FTEs is an approximation of forecasted FTEs, based on the approved time-off and shift requests for employees in the campaign. The adjusted FTEs for a campaign are a simple summation of the adjusted full time equivalents for all underlying queues.	✓	✓	✓
Occupancy	How busy employees are. This statistic indicates how much time an employee spends doing what they were scheduled to do. For example, if an employee is scheduled to spend 2 hours on calls, but spends an hour doing call-related work. The occupancy of the employee is 50%.	✓	✓	
Backlog	Total number of queued contacts (for deferred queues only).		✓	

Outbound Statistics

For outbound dialing, the following statistics are also included.

Statistic	Description
Dials	Total count of outbound dials that were made in a specified interval. This count includes *Connects*, *Right Party Connects*, and *Dials* that did not connect to a person.
Connects	Total count of outbound dials that were made in a specified interval that connected to a person.
Connect Rate	Percentage of dials that connected to someone, equivalent to *Connects/Dials*.
Right Party Connects	Total count of outbound dials that were made in a specified interval that connected to the intended person. These numbers are not redialed because the right party was reached.
Right Party Connect AHT	Average talk time of all *Right Party Connects* in this interval.
Right Party Connect Rate	Percentage of dials that connected to the intended party, equivalent to *Right Party Connects/Dials*.

Related topics

Queue statistics display options, page 16

Queue statistics display options

For each statistic available on a queue, there are several options on what gets displayed on the Queue Analytics screen.

The Queue Analytics screen allows you to compare actual data with the generated forecast data and the required data. The required data are the values required to meet the defined service goals. You can choose to view the absolute numbers or show the deviation of the actual from the forecasted and required. The deviation data subtracts the selected statistic from the actual data.

Display Data		Description
Absolute	Actual	Absolute actual numbers for the statistic.
	Forecast	Absolute forecasted statistics for the specified statistic.
	Required	Absolute required statistics for the specified statistic.
Absolute Deviation	Forecast	Absolute deviation of the required vs. actual statistics for the specified statistic.
	Required	Absolute deviation of the required vs. actual statistics for the specified statistic.
Percentage Deviation	Forecasted	Percentage deviation of the forecasted vs. actual statistics for the specified statistic.
	Required	Percentage deviation of the required vs. actual statistics for the specified statistic.

Related topics

Statistics available to Queue Analytics, page 13

Edit a statistics view

To change any of your statistics views you have defined, you can edit them at any time.

Statistics views are collections of statistics displayed together to give you a view on your queues performance.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. From the **View** menu, select the view to edit, and select the pencil icon.
3. Step through the **Create Statistics View** wizard, making the desired changes.
4. Select **Update View**.

Related topics

Define a statistics view, page 13
Statistics available to Queue Analytics, page 13

View trends in Queue Analytics

Trends are based on the actual data for your Queue and offer a view on predicted performance over the coming period. Comparing the trends for your actual performance against your forecasted performance, can offer a view on how accurate your forecast is.

Configure Trends allows you to configure various characteristics of the Trend. Trend data is only available on the following statistics:

- Volume
- Activity Handling Time
- Staffing
- Average Speed to Answer
- Volume Handled
- Full Time Equivalents
- Service Level
- Backlog
- Abandons
- Occupancy

Procedure

1 Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**

2 Select **Trend** in the View Options.

Related topics

Configure trends in Queue Analytics, page 18

Trend convergence effects, page 19

Configure trends in Queue Analytics

You can configure the characteristics of the trend data that is shown for the statistics displayed on the Queue Analytics screen. The trend is a projection of short-term future performance based on the past actual data. For the past data, you can determine how far back to start the trend calculation from. If there are periods of non-typical operation, exclude up to two of these periods to avoid skewing the trend calculation.

Before you begin

You can only configure trends when you are viewing the current scheduling period.

Procedure

1 Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics**.

2 From the filter pane on the left, select a **Campaign**, **Scheduling period**, and **Queues**.

3 On the **Tools** tab, select **Configure Trends**.

4 Set the date and time for the start of the trend calculation, using the **Base from** fields.

5. Specify when the trend calculation ends using **End time**. The default value is the end of the current day.

   If you choose **Time from now**, specify the end time in days, hours, and minutes.
6. Specify the **Convergence** which determines how the trend tracks against the forecasted data.
7. Expand the trend calculation to include non-working hours in by deselecting **Trend calculation based on Working Hours only**.
8. Exclude up to two time periods from the trend calculation using the **Exclude** section. Use the date and time pickers to set the excluded periods.
9. Select **Apply** to save the configuration.

Related topics

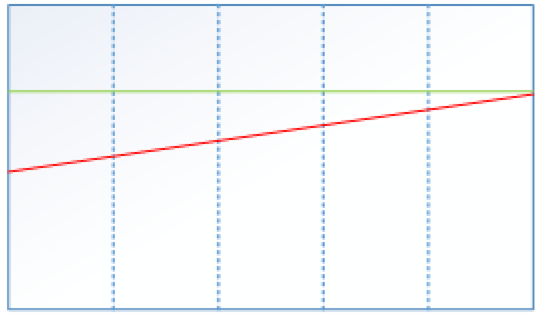
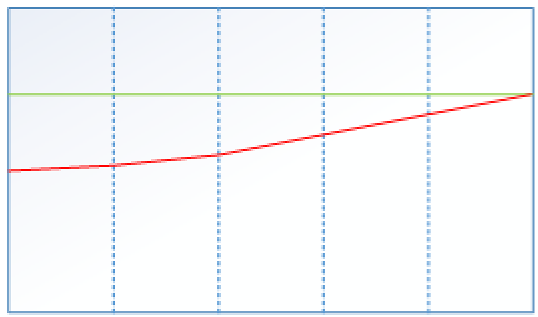
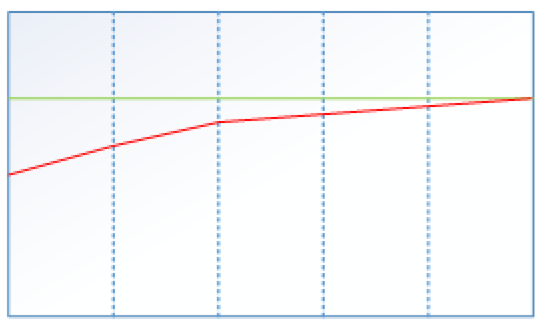
View trends in Queue Analytics, page 18
Trend convergence effects, page 19

Trend convergence effects

The convergence effect determines how the trend data for the queue statistics converges with the forecast data.

The Trend data is a projection of the actual statistical data for a queue.

Convergence Effect	Description
No Convergence	The trending effect (in red) is applied through the entire time range of the campaign with no decrease. *No Convergence* is the default setting. 

Convergence Effect	Description
Linear Convergence	The trending effect (in red) converges linearly through the entire time period. 
Late Convergence	The trending effect (in red) is applied through most of the time range with convergence taking place near the end of the range. 
Early Convergence	The trending effect (in red) converges quickly and trails off gradually through the rest of the time period. 

Related topics

Configure trends in Queue Analytics, page 18

View trends in Queue Analytics, page 18

Reforecast based on trend data

If there is a large deviation between the trend for your actual data and the active forecast, you can reforecast. Reforecasting gives you forecast data which is closer to the actual performance data.

Reforecasting turns the trend data, which is a projection of the actual data, into forecast data. You can save this new forecast as an instance and edit it using the forecast module.

Before you begin

You can only Reforecast if the following conditions are met:

- Trend is selected in the Display Options.
- A campaign and a scheduling period must be selected. The scheduling period must include the current day.
- The selected Statistics View contains both Call Volume and Average Handling Time.
- There must be actual and forecast data for the queue, it cannot be empty.
- The selected queue or any of the queues in a combined queue cannot be:
  - An outbound phone queue or a project queue.
  - The child of a distributed queue or a virtual queue.
- Your role has been assigned the *Reforecast* privilege.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. From the filter pane on the left, select a **Campaign**, **Scheduling period**, and **Queues**.
3. On the **Tools** tab, select **Reforecast**.
4. On the **Reforecast** dialog, provide a name and select the data to save with the forecast.
5. Select **Save**, to save the forecast as an instance.

At this point, you have a forecast saved as an instance which can be opened in the Forecast module.

Related information

Load forecast instances *(Workforce Management Forecasting and Scheduling Guide)*.

Export queue statistics data

To make the queue statistics data available to an external system, export the currently selected statistics set to a file. For the selected queues, all the statistics data for the current scheduling period is included in the export.

Exporting the data can be useful if you want to edit your data in a third-party application like Excel.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. From the left, select a **Campaign**, **Scheduling period**, and **Queues**.
3. On the **Home** tab, select a statistics view from the **View** menu.
4. On the **Tools** tab, select **Export**.
5. Complete the parameters in the **Export** dialog:
   - **Export file name**. A .txt extension is automatically added to the specified file name.
   - **Time interval**: Select between 15 mins, 30 mins, 1 hour, or 1 day intervals.
   - **Time zone**: Select between the time zone of the campaign or UTC.

     In no campaign mode, data is exported in UTC, by default.
   - **Delimiter**: Select whether the data is tab or comma separated.
6. Select **Export**.

Related topics

Import queue statistics data into selected queues, page 23

Bulk import queue statistics data, page 24

Import queue statistics data into selected queues

When you have edited queue statistics data in a third-party application, you can import that data into a queue. Import all the data held in the source file or import only a selection of the statistics from the file. Data can only be imported into the queues you currently have selected and for a selected scheduling period or date range. If you select a date range, it can only be for a maximum of 62 days. To import data into any queues you have not selected, use the Bulk Import.

The ability to import data is useful if you have been editing the data in a third-party application like Excel.

Before you begin

You must only have a single queue selected.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. From the left, select **Queues**.
3. Select the queue, or queues that the data is imported into.
4. On the **Tools** tab, select **Import**.
5. Complete the parameters in the **Import** dialog:
   - **Import file name**: Browse to the data file.
   - **Data to import**: By default, a list of all statistics is enabled for import. Clear the selection of any statistic you do not want to import.

     Data for a selected statistic can only be imported if it exists in the source file.
   - **Time interval**: Select between 15 min, 30 min, or 1 hour intervals.
   - **Number of lines to ignore from the start of file**: Specify the lines at the start source file that do not contain data. For example, ignore the first line, which could be the column header row.
   - **Delimiter**: Select whether the data in the file is tab or comma separated.
   - **Time zone**: Select between the time zone of the campaign or UTC.

     In no campaign mode, data is imported in UTC.
6. Select **Import**.

Related topics

Export queue statistics data, page 22

Bulk import queue statistics data, page 24

Bulk import queue statistics data

A standard import only allows you to import statistics data to queues you have selected and within a single scheduling period or date selection. The bulk import conveniently allows you to import data to any number of queues and across any date range. Using bulk import, you have the option of importing all the data from the file, or selecting a subset of the data.

Data can only be imported into queues that exist in the system. Data for any queue named in the file, that does not exist in the system is ignored during import.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. On the **Tools** tab, select **Bulk Import**.
3. Complete the parameters in the **Bulk Import** dialog:
    - **Import file name**: Browse to the data file.
    - **Data to import**: By default, a list of all statistics is enabled for import. Clear the selection of any statistic you do not want to import.

      Data for a selected statistic can only be imported if it exists in the source file.
    - **Time interval**: Select between 15 min, 30 min, or 1 hour intervals.
    - **Number of lines to ignore from the start of file**: Specify the lines at the start source file that do not contain data. For example, ignore the first line, which could be the column header row.
    - **Delimiter**: Select whether the data in the file is tab or comma separated.
    - **Time zone**: Select between the time zone of the scheduling period or UTC.

      In no campaign mode, data is imported in UTC.
4. Select **Import**.

Related topics

Import queue statistics data into selected queues, page 23

Adding notes to queue data

There may be cases when looking over queue data, when you identify periods of uncharacteristic behavior. It may be that external circumstances have driven up traffic for a limited period. You can add a note to the data for this period explaining the reasons for the behavior. The data from these periods can be excluded from use in generating a forecast.

Excluding data from forecasts

Through notes, you can also choose to exclude uncharacteristic data from use in forecasts. When used as history weeks, data from any period excluded from a forecast is added to the forecast as a series of zeros.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. From the filter pane on the left, select a **Campaign**, **Scheduling period**, and **Queues**.
3. From the **Set** menu, select a statistics set to view.
4. On the Notes tab on the Details pane, select **New Note**.
5. To specify the period for the note applies to, add the **Start** and **End** date and times.
6. Add the text for the note.
7. Select the queues to which the note applies.
8. Use **Exclude data from forecasts** to determine if the data from the period selected is excluded from use in forecast calculations.
9. Select **Save** to add the note.

Related topics

Viewing and editing notes on queue data, page 26

Viewing and editing notes on queue data

Notes can be attached to queues for periods of uncharacteristic behavior. These notes can offer an explanation to anyone looking at the data, why the data is unusual.

When viewed from the Notes tab on Queue Analytics, opening a note allows it to be edited and deleted. If a note is opened by selecting the note indicator on the history weeks tab, the note is read-only.

Viewing notes on history weeks

When viewing a list of history weeks, if there are notes attached to any of the weeks, an indication is shown next to the week. The indicator can be selected and a read-only view of the note is displayed.

Procedure

1. Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**
2. From the filter pane on the left, select a **Campaign**, **Scheduling period**, and **Queues**.
3. From the **Set** menu, select a statistics set to view.
4. On the Details pane, select the **Notes** tab.

   All notes that have been associated with the selected queues are shown.
5. To view or edit any note, pause over the note, then select the edit icon that appears on the note panel.

   To delete a note, pause over the note and select the delete icon that also appears on the note panel.
6. On the **Notes** dialog, you can do one of the following:
   - Edit the note text
   - Edit the queue assignment
   - Change the Exclude from forecast setting
   - Delete the note
7. If you have made any changes, select **Save** to update the note.

Related topics

Adding notes to queue data, page 25.

Viewing queue data in no campaign mode

No campaign mode allows you to view the data for one or more queues over a specified date range. You are not restricted to viewing only scheduling periods and queues associated with a campaign.

In Queue Analytics, there are a few differences between working in campaign and no campaign mode. When working in no campaign mode:

- All queue data is shown in the user timezone
- Trends are not available
- Reforecast is not available
- Working Hours Only is not available

Before you begin

- *Create a statistics view, which defines the statistics displayed on the Queue Analytics screen.*

Procedure

1 Go to **Tracking.** Under **Queue Analytics,** select **Queue Analytics.**

2 From **Campaigns**, select *No Campaign*.

3 From **Queues**, select a single queue or multiple queues to track.

All the queues you have permissions for, are available for selection.

4 From **Dates**:

- From **Period**, select the predefined time frame you want (for example, **Today**, **Tomorrow**, **Next Week**).

  The system automatically updates the **Start** and **End** fields according to your selection.

- To select a specific date range, select **Custom** and set the date range you want in the **Start** and **End** fields.

5 From the **View** menu, select the statistics view to display.

6 From the Display Options, select what elements to add to the screen.

- **Data**: display the data as numbers in table form.
- **Summary**: displays a summary view of the selected statistics for the campaign.

7 Use the **Day/Week/Period** view selector to choose the zoom level for the data.

Related topics

Define a statistics view, page 13

Adherence

Adherence monitors how well the *scheduled* activities of employees match their *actual* or real-time activities. This analysis allows you to determine if your organization can be more efficient through process changes, policy changes, or performance coaching.

Topics

Adherence overview

Adherence monitors how well the *scheduled* activities of employees match their *actual* or real-time activities. This analysis allows you to determine if your organization can be more efficient through process changes, policy changes, or performance coaching.

Monitoring adherence from data sources

One main way to monitor adherence is from data sources connected to an Automated Call Distributor (or ACD):

1. Employees log on to the system from their phone and indicate their actual state or activity that they are doing.
2. An Automated Call Distributor (or ACD) captures the state.
3. The data source on the ACD translates the state into a reason code, which represents the actual activity the employees is performing.
4. The data source sends the reason code to the Time Collector component in WFM.
5. The Time Collector links the reason code with a WFM activity, based on defined Time Collector Mappings defined in the system.
6. This mapping is used by the Adherence module to check if employees are *in adherence*. Alternatively, it checks if the actual activities they are performing matches their scheduled activities.

   To enable this adherence monitoring, define the Time Collector Mappings in the Work Administration module in WFM.

Example: Monitoring adherence from data sources

1. Employee #9345 logs in by phone and changes their state to one indicating they are working on the phone.
2. The corresponding data source on the ACD translates this activity into the **OnP** reason code, and sends this code to the Workforce Management application.
3. The Time Collector Mapping links the OnP reason code sent from the data source to the WFM activity, **Phone**.
4. The Adherence mapping checks to see if the **Phone** activity is mapped to the scheduled activity, **Answer Calls**.
5. After performing the **Phone** activity for the scheduled amount of time, employee #9345 logs in and changes their phone state to the **After Call Work** activity.
6. The corresponding data source translates this activity into the **ACW** reason code, and sends this code to the Workforce Management application.
7. The Time Collector Mapping links the ACW reason code sent from the data source to the WFM activity, **After Call Work**.
8. The Adherence mapping checks to see if the **After Call Work** activity is mapped to the scheduled activity, **Answer Calls**.

   If **Phone** and **After Call Work** are mapped as alternate activities for **Answer Calls**, the employee is considered to be *in adherence*. If these activities are *not* mapped to **Answer Calls**, the employee is considered to be *out of adherence*.

To monitor employee adherence for *non-phone* employees, employees need to log their activities using the **My Time** module in **My Home**. This method is a different way of monitoring adherence, and is *not* defined by the Time Collector Mapping module.

Related topics

View adherence data, page 31

Related information

My Time (*Workforce Management Employee Guide*)

View and upload Time Collector mappings and edit reason codes (*Workforce Management Administration Guide*)

View adherence data

After publishing a schedule and employees log in and record their activities, the system displays adherence data on the schedule. You can view this data to understand whether the *actual* activities of employees match their *scheduled* activities.

Show Me

Before you begin

- Publish the schedule

In order to view adherence data, you *must* select the relevant campaign, dates and employees to view data for a *published* schedule. Adherence data *only* appears for published schedules.

Procedure

1. Go to **Forecasting and Scheduling**. Under **Calendar**, select **Calendar**.
2. For each employee for the selected published schedule, view the data in the primary time record row.

   This row shows the primary record of actual work done by the employee. Data for this row usually comes from an Automated Call Distributor (ACD) that is loaded automatically into the system. Employees log on to the system from their phone and indicate their actual state or activity that they are doing. An Automated Call Distributor or ACD captures the state.

   Primary time record data can also be recorded manually by the employee from the WFM application. Logged in as an employee, they go to **My Home**, **My Time** and **Time Record**. Managers can also record time for the employee manually by going to **Tracking**, **Adherence** and **Day Details**.
3. Compare the activities displayed in the primary time record against the activities in the **Published Schedule**.

   The **Published Schedule** shows what the employee is *meant* or *scheduled* to be doing. The primary time record shows what the employee is *actually* doing.
4. View the data in the **Adherence** row.

   When defined adherence thresholds are exceeded and the recorded activities (on the primary time record row) are *not* the same, or *not* mapped to the scheduled activities on the **Published schedule**, this gap is displayed on the **Adherence** row as an *adherence exception*.

   You can map activities to *alternate* activities for adherence. An employee is considered to be in adherence when performing that activity or any of the mapped activities. Therefore, it could be that the activity in the primary time record row is *not* the same activity displayed for the **Published Schedule**, but the primary activity is *mapped* to the published activity. Due to this activity mapping, the system does *not* create an exception because the employee is considered to be in adherence.
5. For the time granularity, click **Hours** or **Day**.

   In these views, data is displayed if the primary time record does *not* match the **Published Schedule**. Before approving a misalignment in the data, the data appears in red. After approving a misalignment in the data, it appears in green for that time frame. In this view, it shows how much the employee is *not* adhering to the schedule.

6 Click **Week** or **Period**.

In these views, a specific percentage appears (such as 87%), indicating how much the employee adhered to the schedule for that specific day.

This value takes into account employees whose exceptions have been authorized against the published schedule. If an employee has an exception that has been authorized, the employee is considered to be in adherence during the authorized time window.

7 View the data in the secondary time record row.

Similar to the primary row, the secondary row also shows a record of actual work done by the employee. It is another way of monitoring what the employee is doing. The data for this time record is generated mostly by the Desktop & Process Analytics (DPA) product. It monitors the employee desktop.

There is *no* manual way of entering a Secondary time record. The data is fed by the *Generic - FTCI - File Import Time Collection Interface*, which is a continuous process that extracts employee time records from a flat file and inserts them into the database.

The secondary time record provides read-only data. The data is *not* used in any calculation. It is *not* used to decide whether an employee is adhering or *not* adhering to a schedule.

The labels for the primary and secondary time record rows can be customized in **System Management** > **General Settings** > **General** under **Activity Display Names for Desktop Monitoring**. The names of the parameters are **Primary Activity Display Name** and **Secondary Activity Display Name**, accordingly.

Related topics

Adherence overview, page 29

Related information

Publish the schedule (*Workforce Management Forecasting and Scheduling Guide*)

My Time (*Workforce Management Employee Guide*)

Generic - FTCI - File Import Time Collection Interface (*Workforce Management Generic Interfaces and Adapters Guide*)

Desktop and Process Analytics (DPA) (*Desktop and Process Analytics (DPA) Configuration Guide*)

Activity display names for Desktop Monitoring (*Workforce Optimization System Administration Guide*)

View snapshot of employee adherence

View a snapshot of adherence information for selected employees.

Procedure

1. Go to **Tracking**. Under **Adherence**, select **Quick View**.
2. From the left pane, select the filters to find the employees you want.
3. From the list, select the employees and click **View**.

   The system displays adherence information in different sections.

Related topics

Quick View adherence data, page 33

Quick View adherence data

The Quick View page displays detailed adherence data for selected employees.

Field	Description
Adherence Status Summary	Provides a summary of adherence information for the selected employees.
Total Selected	Total number of selected employees.
Total In	Total number of selected employees currently logged onto the ACD system.
Out of Adherence	Number of selected employees currently out of adherence.
Too Long in Activity	Number of selected employees currently exceeding the **Maximum Time In Activity** set in **Work Administration**. (Under **Activities**, select **Activities**. It is located under **Activity Manager Usage**.)
Activity	Name and number of activities that are scheduled, and are actually being performed by the selected employees.
Day Summary (up to now)	Lists adherence information for the current day for the selected employees. This data applies only to the current activities the employees are performing. In contrast to the other data on this page, the values listed here apply to the *entire day*, from 12:00 AM to the current time.

Field	Description
Scheduled In-Office Hours	Total duration of all scheduled activities for the day that do *not* map to the system-defined activity, **No Activity**. This value counts the scheduled hours up to the current time *only*. NOTE: The use of the term *In-Office* is *not* related to employees who physically work on the organization premises, as opposed to employees who work from home.
Exceptions during In-Office Hours	Total duration of all unapproved exceptions for the day that occur during scheduled activities that do *not* map to the system-defined activity, **No Activity**. Only the minutes that overlap between the exceptions and the scheduled in-office hours are counted.
Day's Adherence	Percentage of time during scheduled in-office hours that the employees are in adherence. This value counts the scheduled hours up to the current time *only*. This value is calculated using the following formula: 1 - (Adherence Exceptions during In-Office Hours / Scheduled In-Office Hours) * 100 NOTE: This calculation is computed using the exact underlying durations (with millisecond precision), rather than using the rounded values displayed in the table. The percentage is rounded to the nearest integer.
The following fields provide a summary of the current adherence status for the selected employees:	
Name	Name of the employee.
Organization	Organization to which the employee belongs. Depending on how your system is configured, this column might *not* be displayed.
Scheduled Activity	Activity for which the employee is currently scheduled.
Out of Adherence	Amount of time the employee has been continuously out of adherence (disregarding authorized exceptions).
Actual Activity	Activity the employee is currently logged into.

Field	Description
Time in Activity	Amount of time the employee has been in the current state. This is measured against the setting of **Maximum Time In Activity** set in **Work Administration**. (Under **Activities**, select **Activities**. It is located under **Activity Manager Usage**.) If **Time In Activity** is greater than **Maximum Time In Activity**, the colored box is red. The red color indicates that a **Too Long In Activity** exception has occurred. Otherwise, the colored box is blank (with a solid white border). This box indicates that a **Too Long In Activity** exception has *not* occurred.
Day's Adherence	Percentage of time during scheduled in-office hours that employees are in adherence. This value counts the scheduled hours up to the current time only. This value is calculated using the following formula: 1 - (Adherence Exceptions during In-Office Hours / Scheduled In-Office Hours) * 100 NOTE: This calculation is computed using the exact underlying durations (with millisecond precision), rather than using the rounded values displayed in the table. The percentage is rounded to the nearest integer.

Related topics

View snapshot of employee adherence, page 33

Tracking day details

You can track all time records submitted for each employee on a specific date. Each time record indicates the start and end of shifts, the activities performed during the shifts, and the times they were performed. All time records entered for an employee for the selected date are displayed.

You can do the following for one employee at a time on a selected date:

- Approve all time records or a specific time record
- Create or delete a time record
- Create a time interval to determine how time for employees is charged when employees are not logged in to the system
- Add, edit or delete entries within a specific time record

  If the time entry you add is valid, it is automatically approved when you create it.

You can view the Day Details page in two views:

- **Collapsed View**: Summarizes contiguous blocks of time by activity type and **Paid** status
- **Extended View**: Displays time for each activity in each time record

Only time records that started on the selected date are shown. Time records that *ended* on the selected date but *started* on a previous date are not shown on the selected date.

Related topics

Approve time records, page 36
Create a time record, page 37
Delete a time record, page 38
Create a time interval, page 38
Add entry to a time record, page 40
Edit entry in a time record, page 41
Delete entry in a time record, page 41

Approve time records

You can approve all time records for a specific employee on a specific day. You can also approve an individual time record on a specific day.

Procedure

1. Go to **Tracking**. Under **Adherence**, select **Day Details**.
2. From the left pane, select the employee for which you want to approve time records and click **View**.

   If you select multiple employees, the system displays the selected date for each employee. To navigate between each employee, click the **Previous** and **Next** arrows.
3. On the right side of the right pane, select the date for which you want to approve time records.

   You can select the next and previous days by selecting the arrows, or select a specific date from the calendar.

4 Determine the next step:

- To approve a *specific* time record on the selected date, click **Approve Record**.

  The system displays a message, indicating the time record has been approved. A green check replaces the red square in the **Approved** column. To revert the approval of the time record, select **Unapprove Record**.
- To approve *all* time records on the selected date, click **Approve Day**.

Related topics

Create a time record, page 37
Delete a time record, page 38

Create a time record

You can manually create a new time record for an employee on a selected date.

Procedure

1 Go to **Tracking**. Under **Adherence**, select **Day Details**.

2 From the left pane, select the employee for which you want to create a new time record and click **View**.

If you select multiple employees, the system displays the selected date for each employee. To navigate between each employee, click the **Previous** and **Next** arrows.

3 On the bottom of the screen, click **Create Record**.

4 Complete the entries for the time record and click **Save**.

The system adds the time record for the employee on the selected date.

5 To add or edit comments for the time record, click **Edit Comments**. Enter your comments in the text box and click **Save**.

Related topics

Time record settings, page 37

Time record settings

When you select to manually create a new time record, complete the fields for the time record.

Field	Description
Time	Sets the date and time of the activity of the entry in the time record. The first entry is always **Start shift**, and the last entry is **End shift**.
Activity Type	Defines the type of activity of the entry. For example: **Absence activities**, **Learning activities**, **Planned events**.

Field	Description
Activity	Defines the activity of the entry, defined by the activity type. For example, if the **Activity Type** is **Absence activities**, the possible activities are: **Jury Duty**, **No Call/No Show**, **Personal Day**, **Sick** and **Vacation**.
Duration	Length of the entry in hours and minutes. If you change either the **Time** or **Duration** of an entry, the other value also changes accordingly.
Payable	Indicates whether the activity is paid or not for the entry.
Notes	Specifies any comments or instructions about the entry.
Action	Allows you to insert a new time entry after the current one (plus + icon). To delete the current entry, click the Trash icon.
Comments	Specifies any comments to include with the time record.

Related topics

Create a time record, page 37

Delete a time record

If needed, you can manually delete an existing time record.

Procedure

1. Go to **Tracking**. Under **Adherence**, select **Day Details**.
2. From the left pane, select the employee for which you want to delete a time record and click **View**.

   If you select multiple employees, the system displays the selected date for each employee. To navigate between each employee, click the **Previous** and **Next** arrows.
3. Find the time record you want to delete, and click **Delete Record**.
4. When the system prompts you to confirm the deletion, click **OK**.

   The system removes the time record you selected.

Related topics

Create a time record, page 37

Create a time interval

To determine how time for employees is charged when they are not logged in, create a time interval.

Procedure

1. Go to **Tracking**. Under **Adherence**, select **Day Details**.

2 From the left pane, select the employee for which you want to create a time interval and click **View**.

If you select multiple employees, the system displays the selected date for each employee. To navigate between each employee, click the **Previous** and **Next** arrows.

3 On the right side of the right pane, select the date for which you want to create a time interval.

You can select the next and previous days by selecting the arrows, or select a specific date from the calendar.

4 On the bottom of the screen, click **Create Time Interval**.

5 Complete the entries for the time interval and click **Save**.

The system adds the time interval for the employee on the selected date.

Related topics

Time interval settings, page 39

Time interval settings

When you select to create a new time interval, complete the fields for the time interval.

Field	Description
Start Time	Sets the start date and time of the time interval.
End Time	Defines the end date and time of the time interval.
Activity Type	Defines the type of activity of the time interval. For example: **Absence activities**, **Learning activities**, **Planned events**.
Activity	Defines the activity of the time interval, defined by the activity type. For example, if the **Activity Type** is **Absence activities**, the possible activities are: **Jury Duty**, **No Call/No Show**, **Personal Day**, **Sick** and **Vacation**.
Time Interval	Length of the time interval in hours and minutes. If you change either the **Time** or **Duration** of an entry, the other value also changes accordingly.
Payable	Indicates whether the activity is paid or not for the time interval.
Notes	Specifies any comments or instructions about the time interval.

Related topics

Create a time interval, page 38

Add entry to a time record

You can manually add an entry within an existing time record.

Procedure

1. Go to **Tracking**. Under **Adherence**, select **Day Details**.
2. From the left pane, select the employee for which you want to add an entry to an existing time record and click **View**.

   If you select multiple employees, the system displays the selected date for each employee. To navigate between each employee, click the **Previous** and **Next** arrows.
3. On the right side of the right pane, select the date for which you want to add an entry.

   You can select the next and previous days by selecting the arrows, or select a specific date from the calendar.
4. Go to the time record for which you want to add an entry, and highlight the activity after which you want to add an entry.

   You can add an entry after any activity except for **End Shift**.
5. Click **Insert New Time Entry**.
6. Complete the fields for the entry, and click **Save**.

   The system adds the entry to the time record for the employee on the selected date.

Related topics

Time record entry settings, page 40

Time record entry settings

When you select to create a new entry in a time record, complete the fields for the entry.

Field	Description
Time	Sets the start date and time of the entry.
Activity Type	Defines the type of activity of the entry. For example: **Absence activities**, **Learning activities**, **Planned events**.
Activity	Defines the activity of the time interval, defined by the activity type. For example, if the **Activity Type** is **Absence activities**, the possible activities are: **Jury Duty**, **No Call/No Show**, **Personal Day**, **Sick** and **Vacation**.
Duration	Length of the entry in hours and minutes.
Payable	Indicates whether the activity is paid or not for the entry.
Notes	Specifies any comments or instructions about the entry.

Related topics

[Add entry to a time record](), page 40

Edit entry in a time record

You can easily edit an entry in a time record.

Procedure

1. Go to **Tracking**. Under **Adherence**, select **Day Details**.
2. From the left pane, select the employee for which you want to edit an entry to an existing time record and click **View**.

   If you select multiple employees, the system displays the selected date for each employee. To navigate between each employee, click the **Previous** and **Next** arrows.
3. On the right side of the right pane, select the date for which you want to edit an entry.

   You can select the next and previous days by selecting the arrows, or select a specific date from the calendar.
4. Go to the time record for which you want to edit an entry, and highlight the time entry you want to edit.

   You can edit any entry except for **Start Shift**.
5. Click **Edit Time Entry**.
6. Edit any fields of the entry, and click **Save**.

   The system updates the entry for the time record.

Related topics

[Time record entry settings](), page 40

Delete entry in a time record

You can easily delete an entry in a time record.

Procedure

1. Go to **Tracking**. Under **Adherence**, select **Day Details**.
2. From the left pane, select the employee for which you want to delete an entry to an existing time record and click **View**.

   If you select multiple employees, the system displays the selected date for each employee. To navigate between each employee, click the **Previous** and **Next** arrows.
3. On the right side of the right pane, select the date for which you want to delete an entry.

   You can select the next and previous days by selecting the arrows, or select a specific date from the calendar.
4. Go to the time record for which you want to delete an entry, and highlight the time entry you want to delete.
5. Click **Delete Time Entry**.

   One of the following happens:

- If you selected to delete an entry that directly precedes or follows the **Start Shift** or **Start End** entries, the system deletes the entry.
- If you selected to delete an entry between two other time entries (except for **Start Shift** and **End Shift**), the system prompts you to select one of the following to fill the time gap created by the deletion:
  - **Extend the preceding time entry**
  - **Extend the following time entry**

6 If the system prompts you to select one of the following options described in the above step, select either option and click **Save**.

Related topics

Add entry to a time record, page 40

Authorizing exceptions

The system allows you to authorize adherence exceptions, if needed. When you authorize any exception against the published schedule, the employee is considered to be in adherence during the authorized time window.

Authorize exceptions for individuals or date ranges and groups

You can authorize individual exceptions for specific employees after they are created. You can also authorize all exceptions within a specific date and time range for one or multiple employees.

The group authorization can be done *before* or *after* exceptions are displayed on the calendar. Authorizing an exception for a group and date range means that you are creating an authorization that covers the exception.

Out of adherence

When there is a difference between the actual and scheduled work of an employee, an employee is considered to be *out of adherence*. If the number of minutes an employee is out of adherence exceeds the defined **Adherence Tolerance Minutes** parameter for the scheduled activity, an exception is displayed on the **Adherence** row for the specific employee and activity.

Why authorize exceptions?

By default, exceptions are unauthorized and appear in red on the **Adherence** row on the calendar. This flags the periods of time when employees were *not* doing what their published schedules indicate they should be doing. However, there are times when employees are out of adherence for valid reasons. The system allows you to easily authorize these instances. Once you authorize an exception, the relevant employees are considered to be in adherence for that time window.

Example: authorize an exception for one employee

From 3:00-4:00 PM on a Thursday, an employee was scheduled for the back office activity. However, an urgent team meeting was called between 3:30-4:00 PM. During that half hour, the employee was out of adherence and an exception was displayed. You can select that specific exception and authorize it for that employee. Now the employee is considered to be *in adherence* for that time window.

Example: pre-authorize exceptions for date range and employees

Three employees have to do a research project for the upcoming week instead of answer phones, which is their main scheduled activity for all shifts during that week. Therefore, you know in advance that exceptions will be displayed for these employees for that week. You can pre-authorize exceptions for those specific employees during that week.

Example: post-authorize exceptions for date range and employees

A last-minute training was scheduled on a specific day for a group of employees a week ago. As a result, they were not able to do their scheduled activities on that day. You can authorize all existing exceptions for that day for that group of employees.

Related topics

Authorize individual exceptions, page 44

Unauthorize individual exceptions, page 45

Authorize exceptions for dates and group, page 46

Unauthorize exceptions for dates and group, page 46

Authorize individual exceptions

You can authorize individual adherence exceptions for a specific employee. You can authorize part or the entire time period of the exception.

Example: Authorize individual exception

An employee attended an impromptu team meeting from 2:00-3:00 on a Tuesday, instead of answering phones. An exception was displayed, as their actual work differed from the published schedule. You can then authorize that specific exception.

Before you begin

In order for exceptions to be displayed, you *must* have a published schedule. If there is no published schedule, publish it and authorize exceptions, as required.

For instructions on publishing the schedule, see Publish the schedule (*Workforce Management Forecasting and Scheduling Guide*).

Procedure

1. Go to **Forecasting and Scheduling** > **Calendar** > **Calendar**.
2. From the left pane, select the data to display on the calendar (campaign, dates, employees, and queues).
3. From the **Adherence** row, select the exception you want to authorize, which is displayed as a red block.

   The **Adherence** card on the side panel is displayed, showing the published and primary (actual) activities, and the **Unauthorized** status (default when an exception is created).
4. From the **Status** field, select **Authorized**.

   The **Start** and **End** fields and the **Comment** field are now available. By default, the **Start** and **End** fields display the entire time period of the exception. (The time format is hh:mm:ss.)
5. Do one of the following for the values in the **Start** and **End** fields:
   - To authorize the entire time period of the exception, leave the values as is.
   - To authorize only a *portion* of the time period, in the **Start** and **End** fields, select the time range you want.

> You *cannot* authorize the exception for a time frame that is longer than the exception itself.

6. From the **Comment** field, enter any notes about the authorization that you want to be displayed on the **Adherence** card.
7. Click **Save**.

   The exception for the time frame you authorized now appears in green on the calendar. The authorization itself is shown as a gray line on the **Adherence** row.

   The green authorized exception includes the following information:
   - **Authorized** status
   - Time range that has been authorized (either all or a portion of the exception)

- Duration of the authorization in parentheses
- **Published**: <Activity of the published schedule>
- **Primary**: <Activity of the Primary time record>
- Any comments that were added to the exception

The grey authorization block includes the following information:

- **Authorized** status
- Time range that has been authorized (either all or a portion of the exception)
- Duration of the authorization in parentheses
- Any comments that were added to the exception

Related topics

Unauthorize individual exceptions, page 45
Authorize exceptions for dates and group, page 46
Authorize exceptions for multiple activities, page 47

Unauthorize individual exceptions

You can revert previously authorized individual exceptions to an unauthorized state.

Before you begin

Authorize individual exceptions, page 44

Procedure

1. Go to **Forecasting and Scheduling** > **Calendar** > **Calendar**.
2. From the left pane, select the data to display on the calendar (campaign, dates, employees and queues).
3. From the **Adherence** row, select the authorized exception you want to unauthorize, which is represented by a green block.

   The **Adherence** card on the side panel is displayed, showing the published and primary (actual) activities, the **Authorized** status, and the time frame of the authorized exception.
4. From the **Status** field, select **Unauthorized**.

   When you change the status back to **Unauthorized**, the **Time** and **Comment** fields are unavailable.
5. Click **Save**.

   The exception for the time frame you authorized now appears in green on the calendar.

Related topics

Authorize individual exceptions, page 44
Authorize exceptions for dates and group, page 46
Authorize exceptions for multiple activities, page 47

Authorize exceptions for dates and group

You can authorize adherence exceptions for a specific date and time range, and group of employees. You can authorize the exceptions *before* or *after* they have been created.

Procedure

1. Go to **Forecasting and Scheduling**. From **Calendar**, select **Calendar**.
2. From the left pane **Employees** filter, select the employees for whom you want to authorize exceptions, and select **Apply**.

   The selected employees appear on the calendar grid. You can *only* authorize exceptions for employees who are included on the grid.
3. From the grid, select the employees for whom you want to authorize exceptions.
4. From **Tools**, select **Group Adherence**.
5. From **Employees** on the right side of the screen, select the employees for whom you want to authorize exceptions.

   The employees you selected from the grid are already selected. You can change this selection, as needed. To select employees on *all* pages, select **All pages** and select the relevant employees. To *only* select employees from the *current* page displayed in the grid, select **Current page** and select the relevant employees.
6. Under **Date range**, in the **Start** and **End** fields, enter the date and time range for which you want to authorize exceptions.
7. From **Exception status**, select **Authorized**.
8. Optional. In the **Comment** field, enter a comment about the authorization.
9. To save the authorization update, click **Save**.

   On the bottom part of the **Adherence** row, a blue authorization layer appears for the defined date and time range and employees. Exceptions above this layer appear in green. Any new exceptions displayed during this date and time range and for the selected employees automatically appear in green as well.

> Changes to the schedule can cause exceptions to be added or removed. The exception authorization, however, remains in place. It is still visible on the schedule as a blue bar on the bottom layer of the **Adherence** row.

Related topics

Unauthorize exceptions for dates and group, page 46

Authorize individual exceptions, page 44

Authorize exceptions for multiple activities, page 47

Unauthorize exceptions for dates and group

You can revert previously authorized exceptions to an unauthorized state.

Procedure

1. Go to **Forecasting and Scheduling** > **Calendar** > **Calendar**.

2 From the left pane **Employees** filter, select the employees for whom you want to unauthorize exceptions, and select **Apply**.

   The selected employees appear on the calendar grid. You can *only* unauthorize exceptions for employees who are included on the grid.

3 From the grid, select the employees for whom you want to unauthorize exceptions.

4 From **Tools**, select **Group Adherence**.

5 From **Employees** on the right side of the screen, select the employees for whom you want to unauthorize exceptions.

   The employees you selected from the grid are already selected. You can change this selection, as needed. To select employees on *all* pages, select **All pages** and select the relevant employees. To *only* select employees from the *current* page displayed in the grid, select **Current page** and select the relevant employees.

6 Under **Date range**, in the **Start** and **End** fields, enter the date and time range for which you want to unauthorize previously authorized exceptions.

7 From **Exception status**, select **Unauthorized**.

8 To save the updated authorization status, click **Save**.

   From the **Adherence** row, the system removes the blue authorization layer for the defined date and time range and employees. Exceptions above this layer appear in red. Any new exceptions displayed during this date and time range and for the selected employees automatically appear in red as well.

Related topics

Authorize exceptions for dates and group, page 46

Authorize individual exceptions, page 44

Authorize exceptions for multiple activities, page 47

Authorize exceptions for multiple activities

Sometimes, an employee has performed other *multiple* activities during the time frame in which they were scheduled for a different *single* activity. When exceptions are created, you can authorize all exceptions for the multiple activities at once, or you can authorize individual exceptions for the specific, individual activities.

Procedure

1 Go to **Forecasting and Scheduling** > **Calendar** > **Calendar**.

2 From the left pane, select the data to display on the calendar (campaign, dates, employees, and queues).

3 Find the place in the schedule when *multiple* activities are recorded when the employee was scheduled for a different *single* activity.

4 From the **Adherence** row, check if an exception was created for this time frame.

> If no exception appears in the **Adherence** row, the recorded activity is mapped to the scheduled activity. Alternatively, it can mean that an employee was still within the amount of time defined for **Adherence Tolerance Minutes** for the scheduled activity.

5 To view details, point to the exception created for the multiple activities.

A tool tip displays the status of the exception (**Unauthorized** by default), time range and duration, published activity and primary time record activities.

6. Select the exception.

   The **Adherence** card on the side panel is displayed, showing the published and actual activities, and the **Unauthorized** status. For the primary time record (or actual activity), the value is **Multiple Activities**.

7. Do one of the following:

   - To authorize *all* activities for the exception, verify that **Multiple Activities** is displayed for the primary time record.
   - To authorize an *individual* exception for one of the multiple activities recorded for the primary time record, select that activity for the primary time record.

8. From the **Status** field, select **Authorized**.

   By default, the **Start** and **End** fields display the time range of the activity or activities you selected.

9. Verify that the time range is what you want to authorize, and modify if needed.

10. Optional. From the **Comment** field, enter a note about the authorization.

11. Click **Save**.

    The exception for the time frame you authorized now appears in green on the calendar.

Related topics

Authorize individual exceptions, page 44

Authorize exceptions for dates and group, page 46

Roster

Roster allows you to view schedules for employees in your organization. As a Supervisor, or a Team Lead, you can use this information when planning future schedules, or activities for your group. You can use the information from upcoming schedules to request shift extensions, and voluntary time off on behalf of employees.

Topics

View employee schedules in textual view

You can view employees schedule information in a textual format. With textual view, you can see schedule information for a single day, with a clear breakdown of activities scheduled for each employee.

Alternate ways to view employee schedules

If you prefer, you can choose to view schedules in a graphical, or multiday view.

Procedure

1. Go to **Tracking**. Under **Roster**, select **Schedules**.
   The default view is textual view for the current day. No employee is selected.
2. To change the organization you are viewing, use the **View** menu in the left panel.
   The default view is the organization that you belong to.
3. Optional: Select the **Employee Filter** icon. From the pop-up, complete the form.
4. To select an employee's schedule to view, do one of the following:
   - Type the name of the employee in the **Search** field.
   - Type a name or in the **Find** field, and select the up or down arrow.
   - Select the employee's name from the **Name** list.
   - To select all employees, use the **Select All** button.
   - To select more than one employee, use the **Ctrl** or **Shift** key.

   Then, select **View**.
5. Management can amend schedules while you are viewing this screen. To refresh schedule information, select **Refresh**.

Related topics

View employee schedules in graphical view, page 52
View employee schedules in multiday view, page 54
Schedules page: textual view, page 50

Schedules page: textual view

This page provides a view of selected schedules for employees in a textual format.

Settings above and below the schedule

Setting	Description
Dates	Date range you want to see schedules for.
Day	Menu to select which day from the selected schedule period to show.

Setting	Description
Sort By	Menu to choose how to organize the schedule by.
View	Menu to choose between Textual, Graphical, and Multiday view.
Refresh	Refreshes the data.

Schedules

Column	Description
Name	Name of employees selected to view.
Campaign	Name of campaign each employee has been assigned to.
Shift	Date and time of each shift. If no shift has been assigned to an employee for that day, **Off** is displayed.
Activities	Breakdown of assigned activities for the day.
Activity's Campaign	The campaign the activity belongs to.

Related topics

View employee schedules in textual view, page 50
Schedules page: multiday view , page 54
Schedules page: graphical view, page 53

View employee schedules in graphical view

You can view employee schedule information in a graphical format. Graphical view is best suited to seeing an overview of a group's schedule, at-a-glance.

Net Staffing Ribbon

In graphical view, you can use the net staffing ribbon to identify time periods that are over or understaffed. For overstaffed periods, you can create a voluntary time off (VTO) request on behalf of employees. For understaffed periods, you can create a shift request and change on behalf of employees.

> The net staffing ribbon is only available in graphical view. If you cannot view the net staffing ribbon in graphical view, check your WFM preferences. To view the net staffing ribbon, the **Show Net Staffing Ribbon in Graphical Schedules** setting must be selected.

Procedure

1. Go to **Tracking**. Under **Roster**, select **Schedules**.

   The default view is textual view for the current day. No employee is selected.
2. To change the organization you are viewing, use the **View** menu in the left panel.

   The default view is the organization that you belong to.
3. Using the **View** box in the main panel, select **Graphical**.
4. Optional: Select the **Employee Filter** icon. From the pop up, complete the form.
5. To select an employee's schedule to view, do one of the following:
   - Type the name of the employee in the **Search** field.
   - Type a name or in the **Find** field, and select the up or down arrow.
   - Select the employee's name from the **Name** list.
   - To select all employees use the **Select All** button.
   - To select more than one employee, use the **Ctrl** or **Shift** key.

   Then select **View**.
6. Optional: Do one of the following to create an employee request using the net staffing ribbon:
   - To add an extension before a shift, select and drag the desired amount of time to the left of the shift start time.
   - To add an extension after your shift, select and drag the desired amount of time to the right of the shift finish time.

     From the pop-up, you can populate the **Shift Request and Change** form as detailed in the **Submitting requests for employees** section of the **WFM Request Management Guide**.
     - To request time off from a shift that is overstaffed, select and drag the desired amount of time from the scheduled shift.

     From the pop-up, you can populate the Time Off Request form as detailed in the **Submitting requests for employees** section of the **WFM Request Management Guide.**
7. Management can amend schedules while you are viewing this screen. To refresh schedule information, select **Refresh**.

Related topics

View employee schedules in textual view, page 50
View employee schedules in multiday view, page 54
Schedules page: graphical view, page 53

Related information

Create a shift request or change request for an employee (*Workforce Management Request Management Guide*)

Create a time-off request for an employee (*Workforce Management Request Management Guide*)

Schedules page: graphical view

This page provides a view of selected schedules for employees in a graphical format.

Settings above and below the schedule

Setting	Description
Dates	Date range you want to see schedules for. Default shows the current week.
View	Menu where you can choose between Textual, Graphical, and Multiday view.
Legend	Indicates the color legend of the graph.
Refresh	Refreshes the data.

Schedule

Field	Description
Date	Date of schedule shown.
Net Staffing	The net staffing ribbon shows what parts of the employee's schedule is over or under staffed. You can then use the net staffing ribbon to request voluntary overtime, or to request time off for employees.

Related topics

View employee schedules in graphical view, page 52
Schedules page: multiday view , page 54
Schedules page: textual view, page 50

View employee schedules in multiday view

You can view employee schedule information in a multiday format. Multiday view allows you to see an employee's schedule for a week at a time. This view is also most suited to viewing many employee's at once.

Alternate ways to view employee schedules

If you prefer, you can choose to view schedules in a textual, or graphical view.

Procedure

1 Go to **Tracking**. Under **Roster**, select **Schedules**.

The default view is textual view for the current day. No employee is selected.

2 To change the organization you are viewing, use the **View** menu in the left panel.

The default view is the organization that you belong to.

3 Optional: Select the **Employee Filter** icon. From the pop up, complete the form.

4 To select an employee's schedule to view, do one of the following:

- Type the name of the employee in the **Search** field.
- Type a name or in the **Find** field, and select the up or down arrow.
- Select the employee's name from the **Name** list.
- To select all employees use the **Select All** button.
- To select more than one employee, use the **Ctrl** or **Shift** key.

Then, select **View**.

5 Management can amend schedules while you are viewing this screen. To refresh schedule information, select **Refresh**.

Related topics

View employee schedules in textual view, page 50

View employee schedules in graphical view, page 52

Schedules page: multiday view , page 54

Schedules page: multiday view

This page provides a view of selected schedules for employees for multiple days.

Settings above and below the schedule

Settings	Description
Dates	Date range you want to see schedules for.
Sort By	List of options you can sort employees by.

Settings	Description
View	Menu where you can choose between Textual, Graphical, and Multiday view.
Refresh	Refreshes the data.

Schedules

Field	Description
Name	Name of employee.
[day fields]	Day of schedule.

Related topics

View employee schedules in multiday view, page 54
Schedules page: textual view, page 50
Schedules page: graphical view, page 53

Chapter 4

Tasks

Tasks allows you to track the workload of each employee. You can view employee's upcoming tasks, track workload volume, and view employee's workload volume history.

Topics

Set employee workload volume

View a summary of the work entered for a selected employee. If required, you can manually set workload volume for employees.

You can:

- Set the inventory of a work queue.
- Enter the amount of work checked out from a work queue, and checked in when completed.
- Enter and track new work that arrives.
- View the status of each work queue's inventory.
- Hide work queues that the manager does not need to see.

Procedure

1. Go to **Tracking**. Under **Tasks**, select **Volumes**.
2. To change the organization you are viewing, use the **View** menu in the left panel.
3. Optional: Select the **Employee Filter** icon. From the pop-up, complete the form.
4. Optional: To select an employee's schedule to view, do one of the following:
   - Use the **Find** menu to scroll up or down to the relevant employees.
   - Type the name of the employee in the **Search** field.
   - Select the employee's name from the **Name** list.
   - To select all employees, use the **Select All** button.
   - To select more than one employee, use the **Ctrl** or **Shift** key.

   Then, select **View**.
5. Optional: Do one of the following:
   - To set an inventory amount for a queue, type the amount in the **Set Inventory** field.

   This total is visible in the Inventory column for all employees.
   - To add arrivals to the inventory total throughout the day, type the amount in the **Arrivals** field.
   - To check out items on behalf of an employee, type the amount in the **Check Out** field.
   - To check in items on behalf of an employee, type the amount in the **Check In** field.

   Once finished, select **Save**.
6. Optional: To view queues that management has chosen to hide, select **Show Hidden**.

Related topics

Volume page settings, page 58

View a history of employee workloads, page 59

Volume page settings

Use these settings to allocate inventory levels to employees.

Settings above and below the Volume Page

Setting	Description
Effective time for events	Select whether to view queues for the current date, or a selected date in the past.
Refresh	Refreshes the data.
Show Hidden	Displays work queues that your administrator has chosen to hide by default.

Volume Page

Column	Description
Work Queue	Name of queue.
Set Inventory	Use this field to set a queue inventory level for all employees.
Arrival	Use this field to add to the queue inventory level throughout the day.
Inventory	The total inventory amount.
Check-out	Use this field to check out items on behalf of employees.
WIP	The amount of work the employee has in progress.
Check-in	Use this field to check in items on behalf of employees.
Check-in Total	The amount of work the employee has checked in.

Related topics

Set employee workload volume, page 57

View a history of employee workloads

View a history of the work entered, and completed for selected employees.

Procedure

1. Go to **Tracking**. Under **Tasks**, select **History**.
2. To change the organization you are viewing, use the **View** menu in the left panel.
3. Optional: To select an employee's schedule to view, do one of the following:
   - Use the **Find** menu to scroll up or down to the relevant employees.
   - Type the name of the employee in the **Search** field.
   - Select the employee's name from the **Name** list.
   - To select all employees, use the **Select All** button.
   - To select more than one employee, use the **Ctrl** or **Shift** key.

   Then, select **View**.
4. Optional: Do one or more of the following:
   - To view employee history by event type, use the **Type** menu.
   - To view a work queue, use the **Work Queue** menu.
   - To edit the value of the event type, over type the value, and then select **Save**.
   - To edit the time of the event type, use the **Time** menu, and then select **Save**.

   If the **Managed** column is selected for the event type, the row cannot be edited.
5. Optional: To view a history for a different date, use the **Period** menu.

Related topics

Volume history page, page 59
Set employee workload volume, page 57
Volume page settings, page 58

Volume history page

Use this page to view a history of work entered, and completed for selected employees.

Settings above the History Page

Setting	Description
Type	Event type.
Work Queue	Name of work queue shown.
Period	Time period shown.

History Page

Column	Description
Type	Event type.
Value	The number of events the employee has of that type for the specified time.
Time	The time period shown.
Work Queue	Name of the work queue that the event type belongs to.
Employee	Name of the employee.
User	Name of the employee who input the value.
Managed	This box is selected if an operations adapter has been run for that event type instance. This means it cannot be edited.
Last Edit Date	The date the row was last edited.

Related topics

View a history of employee workloads, page 59
Set employee workload volume, page 57
Volume page settings, page 58

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