



UPTIVITY CLARITY WFM ADMINISTRATION MANUAL, V5.5.1

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Introduction

Audience

This document is written for end users who will serve as administrators of the Uptivity Clarity WFM application. Readers should have a basic level of familiarity with general networking and their organization's LAN, their organization's PBX, the business rules in their contact center(s), usage of a PC and its peripherals, and the Windows operating system.

Goals

The goal of this document is to provide all knowledge, reference, and procedural information necessary to administer Uptivity Clarity WFM in of support those who use it in your organization.

This document is NOT intended as a specific system or network design document, nor is it designed to educate the reader on contact center concepts or best practices.

Assumptions

This document assumes that Uptivity Clarity has been installed and integrated with your PBX if applicable.

Need-to-Knows

Clarity can be installed as a standalone system or with Uptivity Discover for call/screen recording and quality management. Some functionality is different in hybrid Clarity/Discover systems. Refer to the appropriate Uptivity Discover manual for related information if yours is a hybrid system.

Several Clarity features use pop-up menus and other windows that may be considered as "pop-ups" by some browsers. Uptivity recommends that you configure your browser to allow pop-ups for the Clarity site.

Clarity supports standard Windows methods for selecting multiple items in a list: press and hold the Shift key while clicking to select consecutive items or press and hold the CTRL key while clicking to select non-consecutive items.

Clarity Terminology

As a Clarity WFM administrator, you will need to understand these application-specific terms defined below:

- **Bidding Period:** Period of time with defined start and end dates, during which agents may bid for Bidding Schedules.
- **Bidding Schedule:** Collection of shifts that are not tied to specific Agents, but which may be bid upon and awarded to Agents by Workforce Administrators.
- **Labor Units:** Groupings of people by department, division, Skill, or other separation that makes sense for your organization. Most Labor Units have at least one associated Skill. Clarity will allow multiple Labor Units to have the same name, but this is not considered a best practice.
- **Locations:** Typically, the different physical locations where employees work. Locations are associated with Schedule Types. If different labor rules apply to different classes of employees at the same physical location, different Locations may be needed for each class.
- **Roster Types:** Activities or states that appear on the Real Time Roster. These can correspond to either Shift Activity Types (e.g. Lunch, Meeting) or to events sent by your PBX/ACD (e.g. On Call, Available).
- **Schedule Types:** Specify rules for weekly and daily total time and the types of shifts that can be assigned during a week. The rules set on Schedule Types and Shift Templates control when employees can be scheduled to work. A Schedule Type can include one or more Shift Templates.
- **Service Levels:** Every Skill associated with a PBX skill/split will have a corresponding Service Level.
- **Shift Activity Types:** Activities common to shifts in your organization. These are configured by your administrator and are used in scheduling.
- **Shift Templates:** Shift Templates use Shift Activity Types and allow you to set the time guidelines for each activity. Multiple instances of the same Shift Activity Type can be used in the same template, such as two breaks for a shift. One Shift Template can be used by multiple Schedule Types.
- **Skills:** PBX/ACD skills, splits or hunt groups. Your administrator may also configure other soft skills not related to calls. A Skill can be associated with one or more Labor Units.
- **Supervisor:** Within Clarity, the term "supervisor" has very specific meaning. A Supervisor in Clarity must have the **Can be Supervisor** check box selected on their user account and must be assigned as a Supervisor in relation to a Team.

Whenever you see "Supervisor" (as opposed to "supervisor"), this document is referring to a user who is configured as a Supervisor in Clarity. For more information, see [About Permissions & Roles](#).

- **Teams:** Groupings of people associated with the same supervisor. Teams and Labor Units are not related, and people from different Labor Units can be on the same Team.
- **Titles:** Informational job or position titles used in your organization (e.g. trainer, supervisor, team lead). Users can have the organizational title of supervisor, but not be a Supervisor in Clarity. See **Supervisor** above for more information.

Uptivity Clarity WFM Overview

This section provides a generic overview of Clarity’s components and their interactions. You may also find it useful to review the:

- *Customer Guide to Uptivity Clarity WFM Integrations* for details regarding how Clarity works with your PBX
- *Uptivity Discover Administration Manual* for information on using SSL, TLS, and Encryption.

A fully-integrated Clarity system includes the following components:

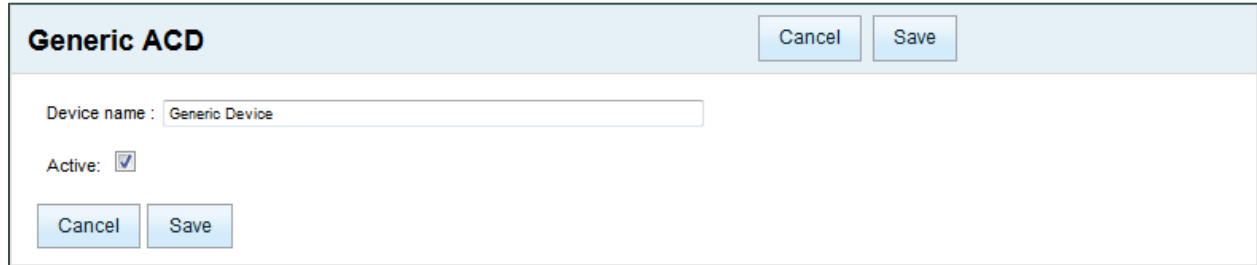
Component	Function
PBX	Serves as source for historical call data as well as real-time agent status and skill data.
Clarity Historical Hub Service	Service that obtains historical call volume data from your PBX, which is written to the Discover database. Data import parameters are configured during installation.
Clarity Real-Time Hub Service	Service that receives real-time status data from your PBX. This data appears on the Clarity roster.
Clarity Web Portal	Provides employees with access to Clarity features and functionality. Administrators configure the system and manage user accounts from the portal as well. The Web Portal can be on a different machine from other Clarity services (such as the Hub services) if necessary.
Discover Database	Stores user accounts and permissions along with Clarity configuration settings, roster settings, call volume settings, and other information.

Data & Import Settings

About Devices

Clarity integrates with various telephony data sources to acquire user data and call volume histories used for forecasting, scheduling, and Real Time Roster reporting. A Device must be created for each data source. The system uses that Device to track the source of the call history data and appends new data to that already imported.

All Devices are created with "Generic ACD" for the device type. Integration with different data sources is handled through Clarity's Hub services. For ease of reference, you should name each Device to reflect the data source's name and always select that Device when importing data.



The screenshot shows a dialog box titled "Generic ACD". At the top right, there are "Cancel" and "Save" buttons. Below the title bar, there is a text input field labeled "Device name:" containing the text "Generic Device". Below that is a checkbox labeled "Active:" which is checked. At the bottom left, there are "Cancel" and "Save" buttons.

Add a Device

To add a device:

1. Click the **Configuration** tab and expand **Data & Import Settings** in the left navigation menu.
2. Click **Devices**.
3. Click **Add Device**.
4. Click **Add Device** in the **Device type: Generic ACD** dialog box.
5. Enter the **Device name**.
6. Select the **Active** check box and click **Save**.

Edit a Device

Before changing the settings of a Device, you must confirm that it is not needed by another device. You can do this by clearing the Active check. This will display a warning message that details the devices, skills, users, etc., tied to that Device.

To edit an existing Device:

1. Click the **Configuration** tab and expand **Data & Import Settings** in the left navigation menu.
2. Click **Edit** next to the desired device.
3. Make the desired changes and click **Save**.

Remove a Device

A Device cannot be deleted if it has ever been used. This is by design. Deleting a Device also deletes all associated data, and would therefore impact the integrity of historical information and reports. When you attempt to remove a Device, you will see a message either telling you the Device cannot be deleted because it has been used, or confirming that the Device was deleted successfully.

To remove an existing Device:

1. Click the **Configuration** tab and expand **Data & Import Settings** in the left navigation menu.
2. Click the **Remove** button next to the desired device.

About Data Settings

This section is provided for reference only. You should never change these settings after the initial installation without consulting Uptivity Clarity Support. Doing so can cause current schedules, forecasts, and roster information to become unusable.

Data settings include:

- **Fundamental Interval:** The basic length of time in the system via which scheduling/forecasting/ charting is done. This is the granularity at which charts will show and activities can be scheduled. Uptivity recommends that all installs use the lowest (and default) setting of **15 minutes**.
- **Real-Time Interval:** Specifies how the real-time services track device statistics that accumulate over an interval and reset. This value is the reset value (i.e., every x minutes). This value is specific to the client's device configuration. AACC uses 15 minutes. Some versions of Avaya CMS use 30 minutes although it might

be possible to configure it to be 15, 30, or 60 minutes. The default value is **30 minutes**.

- **Calls logged upon ending instead of beginning:** This setting is related to the user's device. It indicates whether a call and associated data is written to Clarity's historical records in the time period when the call ended or when it began. The default value is **True**.
- **First Day of Work Week:** Sets the starting day of the work week. This is used in tracking and calculating minimum, maximum, and overtime hours for the week. This will also change the way reports, charts, and calendars are displayed in the web portal, changing the first day of the week to match what is set here. The default value is **Sunday**.

System and Site Widget Settings

Configure Site Settings

These settings are used in hybrid Discover/Clarity installations to enable users to log in to one system and then access the other system without having to log in again. If you have a standalone Clarity system, this section does not apply.

To configure site settings:

1. On the **Configuration** tab, expand **System Settings** in the left navigation menu.
2. Click **General**.
3. In the **Site Settings** area, select the option to enable integration.
4. Enter the URL of the Discover Web Portal's login page.
5. Click **Save**.

Configure Email Server Settings

These settings must be specified in order for Clarity to send emails other than those sent when users reset their passwords.

To configure email server settings:

1. On the **Configuration** tab, expand **System Settings** in the left navigation menu.
2. Click **General**.
3. In the **Email Settings** section, enter these values:
 - **SMTP Host Email Server:** Enter the hostname of the SMTP mail server Clarity will use to send emails.
 - **"Send from" Email Account:** This can be any email address, real or fake. It does not have to be tied to the entered username and password.
 - **"Send from" Username:** Username for authentication to the SMTP server.
 - **"Send from" Password:** Password for authentication to the SMTP server.
 - **Enable Email Notifications:** This option must be selected in order for Clarity to send email notifications.
4. Click **Save**.

Configure Widget Settings

These settings control all the widgets for a Clarity site. If multiple sites are installed in an environment, each site will have different widget settings. Follow these steps to configure the home page settings:

1. Click the **Configuration** tab and expand **System Settings** in the left navigation menu.
2. Click **Widget Settings**.
3. Configure the desired settings (as explained below) and click **Save**.

About Twitter Settings

Twitter settings include:

- **Twitter Screen Name:** Screen name of the Twitter account, not the User ID.
- **Number of Twitter Posts to Show:** Set this value based on the space available on the Clarity Home page and frequency of tweets. Up to 100 tweets can be displayed.
- **Twitter Access Token:** Value created when Twitter application is created.
- **Twitter Access Token Secret:** Value created when Twitter application is created.
- **Twitter Consumer Key:** Value created when Twitter application is created.
- **Twitter Consumer Secret:** Value created when Twitter application is created.

About Facebook Settings

Facebook settings include:

- **Facebook App ID:** ID created by Facebook when you register your Web site with them.
- **Facebook App Secret:** Value created by Facebook when you register your Web site. Used to decode encrypted messages from Facebook.
- **Facebook Page ID:** ID for Facebook home page.
- **Number of Facebook Posts to Show:** Set this value based on the space available on the Clarity Home page and frequency of posts.
- **Facebook Publish Access Token:** Value generated by Facebook when creating a Facebook application. Used by Clarity to publish schedule announcement to a Facebook page.

Configure the Scheduling Service

The Clarity Scheduling Service handles API requests to generate schedules as well as run simulations for calculating estimated metrics. These metrics are used to generate the charts/graphs in Over/Under and Service Level reports. The Clarity application must be configured to know where the Scheduling Service is running. This is typically done during installation of Clarity.

To configure this setting:

1. Click the **Configuration** tab and expand **System Settings** in the left navigation menu.
2. Click **Services**.
3. Under **Name**, select **Scheduling Service** from the drop-down list.
4. Under **IP Address**, enter the IP address of the server running the Scheduling Service.
5. Under **Port**, enter the port number on which the Scheduling Service will communicate (the default port is 2016).
6. Click **Save**.

Labor, Shifts, and Schedule Settings

Managers and system administrators control Clarity's functions from the **Configuration** tab.

Some items depend on other items to be configured first (see table). Being aware of the dependencies will help you understand the order in which to perform tasks.

First, configure these items:								
Devices	Titles	Skills/Service Levels	Locations	Users	Shift Activity Types	Roster Types	Work Modes	Aux Reasons
You will use those basic items to configure these second-level items:								
Labor Units			Teams			Shift templates		
Finally, you will use those second-level items to configure:								
Schedule Types					Import Service			

Titles, Locations, and Teams cannot be deleted if they are used by an employee account.

Labor Settings

Configure Titles

Every user must be assigned a Title. Typical Titles are employee, supervisor, trainer, and others. These Titles can be used to filter and search for employees. Title names can be edited and removed if they are not in use.

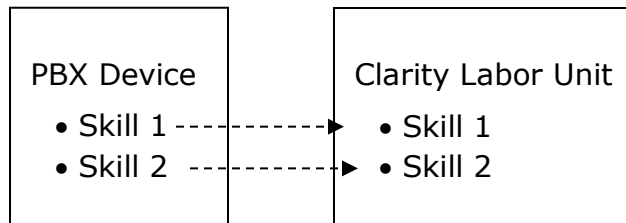
Clarity is preconfigured with "employee" and "supervisor" Titles. Configuring an employee with the Title of "supervisor" does not automatically confer the ability to act as a Supervisor in Clarity. For related information, see [About Permissions & Roles](#).

To add a Title:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Titles** and then click **Add Title**.
3. Click **Edit** next to the new title, enter the **Title** name and then click **Save**.

Configure Skills

Skills in Clarity can be the same as the skills, splits, and hunt groups defined on the PBX/ACD. Other soft skills can be added if employees in a labor unit perform tasks not related to calls, such as delivering training. A Skill can be associated with one or more Clarity Labor Units.



To add a Skill:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Skills** and then click **Add Skill**.
3. Click **Edit** beside each field and enter text as necessary:
 - **Name:** The same name can be assigned to different Skills, but doing so may confuse users of this information on other tabs.
 - **Time Zone:** This value is used for Forecasting. The Forecasting algorithm assumes similar call volumes will occur at the same time each day. This value is also used for Daylight Savings Time adjustments. Select the time zone of the majority of the calls the Skill services so that the incoming call patterns line up with time of day in that time zone. If this value is not set, Forecasting will instead attempt to use the device time zone of the first device it finds related to the Skill.
 - **Device:** Select a value from the list or leave blank for soft skills.
 - **Split:** Enter the split, skill, or hunt group value from the PBX. This value **MUST** match that on the PBX device. Leave this value blank for a soft skill. If a PBX skill is specified, a service level entry is created automatically and configured on a separate page.
4. Click **Save** below the Skills list.

Skills can be edited or removed. Skills assigned to Labor Units cannot be removed until they are removed from the Labor Units. If the Skill was originally configured with a split and the split is later deleted, Clarity disconnects the Skill from the split.

Configure Service Levels

Every Skill associated with a PBX split will have a Service Level associated with it. Skills that do not have splits will not appear on this list.

To configure Service Levels:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Service Levels**.
3. Enter the required values:
 - **Waiting time (in seconds):** How many seconds a customer can wait on line before being answered.
 - **Percent Answered:** The percentage of calls that must be answered in the Service Level waiting time.
4. Select the Skill(s) to which these Service Level values should be applied and move them to the right column using the arrow buttons.
5. Click **Save** below the **Service Levels** list.

Service Levels can be changed after they are created. Those changes affect only future scheduling calculations.

Configure Labor Units

Labor Units in Clarity are groupings of agents who share PBX skills or who are in the same department or division in your organization. Skills can indicate the type of calls an employee can answer or make (see [Configure Skills](#) for more information). A Labor Unit can have zero or more Skills associated with it, and multiple Labor Units may have the same associated Skill.

Teams and Labor Units are not related. Labor Unit names do not have to be unique, but since only the names of the Labor Units appear in lists, duplicated names may confuse users on other pages.

Users select Labor Units from lists for several Clarity tasks and searches, including scheduling. Creating a schedule requires large volumes of data to be aggregated, evaluated and processed. Managing the size of the data sets involved helps to ensure more predictable and accurate results. Best practice is therefore to create Labor Units of 50 or fewer agents.

To configure Labor Units:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Labor Units** and then click **Add Labor Unit**.
3. Click **Edit** next to the new Labor Unit label. Enter a name for the unit.
4. If desired, click **Add Skill**. Then click **Edit** beside the new Skill label and select a Skill from the list.
5. Click **Save** below the **Labor Units** list.

Existing Labor Units and the Skills associated with them can be edited and/or removed.

Configure Locations

Locations are places to which employees are assigned for labor law compliance. Locations are tied to Schedule Types, which specify the labor rules used for scheduling. If different labor rules apply to different employees at a single physical location, different Locations may be needed for each class of employee. A Default Location is automatically created when Clarity is installed.

Locations can be deleted or edited as necessary. However, at least one Location must exist so that new users may be added. If only one Location remains, the system will not allow you to delete it, and will display a warning message if you attempt to do so.

To add a Location:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Locations** and then click **Add Location**.
3. In the new entry, click the **New Location** label and enter a name.
4. Click **Edit** next to the time zone and select the time zone for the Location.
5. Click **Save** under the Locations list.

Configure Teams

Teams are used to assign supervisors who can then view employees' profiles and create schedules. Teams and Labor Units are not related, and they do not affect schedule rules. An employee can be a member of more than one Team. People from different Labor Units can be on the same Team.

To configure a Team:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Teams** and then click **Add Team**.
3. In the new entry, click the **New Team** label and enter a unique name for the Team.
4. If the Team needs a user to be specified as a supervisor, click **Add Supervisor**. Supervisors are needed to approve swap requests, leaves, and other tasks. For more information regarding who can be a Supervisor, see [About Employee Accounts](#). This step is optional.
5. Click **Save** under the Teams list.

Configure Leave Request Types

Leave requests are used to mark times when employees are not available to be scheduled. Leaves can be voluntary (for example, PTO, FMLA or call off) or involuntary (for example, a suspension). Employees can request voluntary predefined leaves when viewing their own Schedule or PTO tab.

Based on your business rules, you can set the following restrictions on Leave Request Types:

- **Employee Can Choose:** the default value for this setting is true. However, if you want to prevent employees from using certain Leave Request Types, you can change it to false. For example, many organizations do not let employees record their own call-offs. If this setting is false on your "Call Off" Leave Request Type, that type would not appear on the list available to employees when making their own requests. However, it would still appear to employees (such as supervisors) who have permission to submit requests on behalf of others.
- **Requires Approval from Supervisor:** the default value for this setting is true. However, if your organization allows automatic approval for certain Leave Request Types, you can change it to false. For example, if you create a Leave Request Type of "Suspension", you might want to configure it for automatic approval due to the unique circumstances in which it would be used.

Clarity is pre-configured with these Leave Request Types and default settings:

- **PTO/Vacation:** Employee Can Choose and Requires Approval from Supervisor are both true.
- **FMLA:** Employee Can Choose and Requires Approval from Supervisor are both true.

- **Unpaid:** Employee Can Choose and Requires Approval from Supervisor are both true.
- **Call Off:** Employee Can Choose and Requires Approval from Supervisor are both false. It is considered a best practice to not allow employees to choose Call Off and this is reflected in the default settings for this Leave Request Type.

To configure Leave Request Types:

1. Click the **Configuration** tab and expand **Scheduling** in the left navigation menu.
2. Click **Leave Request Types** and then click **Add Leave Type**.
3. Click **Edit** next to the **New Type** label and enter a unique name.
4. Click the value on the **Employee can choose** line if you wish to change it, and select the desired value from the drop-down list.
5. Click the value on the **Requires approval from Supervisor** line if you wish to change it, and select the desired value from the drop-down list.
6. Click the white squares under **Background Color** and **Text Color** to customize the appearance of this leave type on employee schedules.
7. Click **Save** under the Leave Request Types list.

About the AHT Goal

This setting is not currently used.

About Work Modes

On the Workmodes page you can configure four interrelated settings: Shift Activity Types, Roster Types, Work Modes, and Aux Reasons. Together, these settings:

- Specify activities that appear on schedules and how they appear.
- Specify states used by the Real Time Roster.
- Relate the activities on Clarity's schedule Shift Templates and Real Time Roster with the activities and agent states from the PBX, ACD, or other system. Related activities may have the same name (e.g., lunch, break, meeting, etc.).

It is possible to delete the items on the Work Modes page. inContact recommends administrators delete only items that have never been used or have not been used for several months or years. Shift Activity Types in use cannot be deleted. Deleting old Shift Activity Types will delete old schedule shift records. Deleting actively used Roster Types, Work Modes, and Aux Reasons will remove users from the roster immediately or possibly when their work mode/state changes.

Note: For some integrations, certain Work Modes must not be deleted. Refer to the *Customer Guide to Uptivity Clarity WFM Integrations* or contact Uptivity Discover WFO Support for more information.

Configure Shift Activity Types

Shift Activity Types must be created before supervisors can assign those activities to shift templates. You can specify activities common to various shifts and set labor rules surrounding those activities. These settings affect other aspects of scheduling in Clarity. For example:

- Paid activities count towards maximum/minimum hours per week/day and overtime calculations; unpaid activities do not. If your settings allow a maximum of 40 hours per week, you can schedule employees for five nine-hour days where each day has a one hour unpaid lunch, so they are only working eight paid hours every day.
- The Late Threshold value is used by the Real Time Roster to determine if an employee is late for an activity. For example, if the threshold for lunch is 300 seconds (five minutes) and the employee is still logged into the PBX four minutes after lunch has started, the roster does not show the employee as late.

Clarity is preconfigured with these Shift Activity Types: Lunch, Break, Meeting and Training.

To add a Shift Activity Type:

1. Click the **Configuration** tab and expand **System Settings** in the left navigation menu.
2. Click **Workmodes** and then click **Add Shift Activity**.
3. Enter a unique name for the new entry.
4. Select the check box if this is a **Paid Activity**.
5. Click the white square under Color to customize the appearance of this activity type on employee schedules.
6. Enter the **Late Threshold** in seconds and click **Save**.

Note: You can only delete Shift Activity Types if they are not being used by a Roster Type or a Shift Template (see below). If you try to delete a Shift Activity Type that is in use, Clarity alerts you by highlighting the entry.

Configure Roster Types

Roster Types are activities or states that appear on the Clarity Real Time Roster. These activities should be related to Shift Activity Types if they also appear on schedules. They can also be related to Work Modes and Aux Reasons. Roster Types can include phone states (e.g., On Call, Call Wrap, Available), shift activities (e.g., lunch, break, meeting), or general agent status (e.g., Off Shift). Clarity is preconfigured with these Roster Types:

- On Call
- Call Wrap
- Available
- In Ring
- Lunch Break
- Break
- Meeting
- Training
- Off Shift
- Other
- Tech Issue

The Off Shift Roster Type must be linked to the corresponding Work Mode(s) for breaks between shifts to be displayed correctly under Schedule Adherence. If no Off Shift activities are specified, down time between shifts may not be detected correctly, causing it to appear as if shifts run together continuously.

To add a Roster Type:

1. Click the **Configuration** tab and expand **System Settings** in the left navigation menu.
2. Click **Workmodes** and then click **Add Roster Type**.
3. Enter a unique name for the new entry.
4. If activities appear on both the schedule and Real Time Roster, select the corresponding Shift Activity Types (e.g., lunch).
5. Select the **On Shift** check box if the activity should appear as such on the Real Time Roster, and click **Save**.

Configure Work Modes

Work Mode codes from your PBX should be entered in Clarity for accurate and efficient reporting. By relating these codes to Roster Types, you can determine how agent status is shown on the Real Time Roster.

Work Modes available are determined by your integration type, some of which may allow you to create custom values. Examples of a Work Mode could include "On-Site" or "In Queue." You should have at least one Work Mode.

To add a Work Mode:

1. Click the **Configuration** tab and expand **System Settings** in the left navigation menu.
2. Click **Workmodes** and then click **Add Work Mode**.
3. Enter the Work Mode **Name** and **Value** exactly as they are configured on the PBX/ACD.
4. Select a **Roster Type**.
5. Select the **Use Aux Reason** check box if desired (see [Configure Aux Reasons](#) for more information).
6. Click **Save**.

Configure Aux Reasons

Aux Reason codes configured on the PBX/ACD are typically related to a Work Mode, but usually provide additional information about the Work Mode. For example, "Agent Troubleshooting" or "Hardware Maintenance" provides more precise details for a Work Mode like "On-Site." Another example is the Aux-Work Mode in the Avaya CMS. Agents in this mode can further enter a code to specify if they are on break, at lunch, or in a meeting.

If a Work Mode is related to an Aux Reason on the PBX, both will appear in the PBX data event. A single Work Mode may have multiple associated Aux Reasons. Entering Aux Reasons in Clarity and relating them to Roster Types allows you to further specify how agent status is shown in the Real Time Roster.

To add an Aux Reason:

1. Click the **Configuration** tab and expand **System Settings** in the left navigation menu.
2. Click **Workmodes** and then click **Add Aux Reason**.
3. Enter the Aux Reason **Name** and **Value** exactly as they are configured on the PBX/ACD.
4. Select a **Roster Type** and click **Save**.

About Shift and Schedule Settings

Schedule Types and Shift Templates together specify the labor rules governing work activities and hours.

A Schedule Type specifies rules for weekly and daily total time and specifies the types of shifts that can be assigned during a week. The rules set on the Schedule Type and Shift Template control when employees can be scheduled to work. A Schedule Type can include one or more Shift Templates.

Shift Templates use Shift Activity Types and allow you to set the time guidelines for each activity. Multiple instances of the same Shift Activity Type can be used in the same template, such as two breaks for a shift. Each instance should have different values. One Shift Template can be used by multiple Schedule Types.

An individual employee can be associated with only one Schedule Type. There is no way to assign employees to specific shifts. The "Minimum minutes between shifts" setting prevents users from being scheduled on a mixture of day and night shifts

during the same week. If users rotate shifts from one week to another, this change must be made manually after a schedule is created.

To create these items, you must understand the applicable corporate and government labor regulations as the automated scheduler uses this information to determine what shifts to give an employee. The number of Schedule Types and Shift Templates needed varies based on a company's needs. Here are some example schedules.

Scenario 1: Three Eight-Hour Shifts

A company has three shifts: 8 AM – 4 PM, 4 PM – 12 AM, and 12 AM – 8 AM. Staffing is seven days a week. Employees do not rotate shifts and work either Monday – Friday or Saturday – Sunday. In this scenario, create one basic Shift Template (e.g. a 30-minute lunch and two 15-minute breaks) with the following Schedule Types:

- Weekday Morning
- Weekday Evening
- Weekday Night
- Weekend Morning
- Weekend Evening
- Weekend Night

Scenario 2: 7 AM – 8 PM Hours

A company is staffed from 7 AM – 8 PM, Monday through Saturday. Employee shifts can change (i.e., morning, afternoon, evening) and can be four, six, or eight hours. Employees work no more than 32 hours a week over five days. In this scenario, create one Schedule Type and three Shift Templates.

Schedule settings:

- Minimum minutes between shifts: If an employee can work until 8 PM and then work another shift at 7 AM, this value would be 660 (11 hours * 60 minutes).
- Maximum hours: 32
- Maximum hours per day: 8
- Schedule shift days: All days except Sunday

Create one Shift Template for each four, six, and eight hour block. Each template may require different activities based on labor regulations.

Scenario 3: 7 AM – 8 PM Hours, Rotating Saturdays

This scenario is the same as Scenario 2 except employees are required to work only one Saturday per month. In this case, create the Schedule Type and Shift Templates mentioned above, but the Shift Templates would exclude Saturday and Sunday. Then create three Saturday-only Shift Templates, one for each time block. Assuring employees work only one Saturday per month would require manual schedule editing.

The more complex your organization's schedule is, and the more flexibility you need to accommodate, the greater the chance that you will need to incorporate some manual editing into building your schedules.

Note: Daylight Saving Time (DST) changes require special considerations. For Spring DST, if you create an event that:

- Starts at 2:00 A.M., 2:15 A.M., 2:30 A.M., or 2:45 A.M., Clarity moves the start time automatically to 1:00 A.M., 1:15 A.M., 1:30 A.M., or 1:45 A.M.
- Ends at 2:00 A.M., 2:15 A.M., 2:30 A.M., or 2:45 A.M., Clarity moves the end time to 1:00 A.M., 1:15 A.M., 1:30 A.M. or 1:45 A.M.
- Starts before 2:00 A.M. and ends at 3:00 A.M. or after, Clarity creates the event normally.

For Fall DST, complications arise when schedules overlap the 2 A.M. time change, particularly if schedules start or end at that time.

Configure Shift Templates

To add a Shift Template:

1. Click the **Configuration** tab and expand **Scheduling** in the left navigation menu.
2. Click **Shift Templates** and then click **Add Shift Template**.
3. Click **Edit** on the **Name** line and enter a unique name for the template.
4. Click **Edit** on the **Length** line and specify the total hours and minutes for the shift using the drop-down lists.
5. Click **Add Activity** if you need to associate Shift Activity Types with this template and refer to the next procedure in this section.
6. Click **Save**.

Within each shift there are typically a variety of activities that regularly occur, but the timing of these activities may vary. Clarity allows you to add Shift Activity

Types to your Shift Templates, but configure their occurrence differently within each template. The total length in hours for all activities cannot exceed the length in hours entered for the shift. For related information, see [Configure Shift Activity Types](#).

Buffer minutes must be considered carefully if employee schedules will be filled with multiple types of activities. The buffer applies to all activities, not specific activities. If lunch has a 60 minute after-buffer, then a training activity could not be scheduled immediately after lunch.

Note: When you use the drop-down lists for time selection, you must conform to the Fundamental Interval settings in your system. For details, see [About Data Settings](#).

To add activity types to a Shift Template (if you are continuing from step 6 of the above procedure, begin with step 3 here):

1. Click the **Configuration** tab and expand **Scheduling** in the left navigation menu.
2. Click **Shift Templates** and then click **Add Activity** under the desired Shift Template.
3. Click **Edit** on the **Activity Type** line and select an activity type from the drop-down list.
4. Click **Edit** on the **Length** line and specify the total hours and minutes for the activity using the drop-down lists.
5. Click **Edit** on the **Start of starting range** line and use the drop-down lists to specify the earliest time the activity can start in relation to the start of the shift.
6. Click **Edit** on the **End of starting range** line and use the drop-down lists to specify the latest time the activity can start in relation to the start of the shift.
7. Click **Edit** on the **Buffer minutes before activity** line and use the drop-down list to specify how many minutes must pass between the end of a previous activity and the beginning of this activity.
8. Click **Edit** on the **Buffer minutes after activity** line and use the drop-down list to specify how many minutes must pass between the end of this activity and the beginning of the next.
9. Click **Save**.

To remove a Shift Activity Type from a Shift Template:

- Follow steps 1 and 2 of the procedure above. Click **Remove** next to the desired activity type and then click **Save**.

Shift Templates can be deleted as long as they are not used in any Schedule Types. To delete a Shift Template:

- Follow steps 1 and 2 of the procedure above. Click **Remove** next to the desired shift template and then click **Save**.

Configure Schedule Types

To add a Schedule Type:

1. Click the **Configuration** tab and expand **Scheduling** in the left navigation menu.
2. Click **Schedule Types** and then click **Add Schedule Type**.
3. Click **Edit** on the **Name** line and enter a unique name for the Schedule Type.
4. Click **Edit** on the **Location** line and select the Location that will use this schedule from the drop-down list.
5. Click **Edit** on the **Minimum minutes between shifts** line and use the drop-down lists to specify the total hours and minutes that must elapse between an employee's scheduled shifts.
6. Click **Edit** on the **Maximum non-overtime hours per week** line and use the drop-down lists to specify the total paid hours and minutes employees can work before they are in overtime.
7. Click **Edit** on the **Maximum total hours per week** line and use the drop-down lists to specify the total paid hours and minutes an employee can work in any given week. If overtime is not allowed, this setting should have the same value as the previous setting.
8. Click **Edit** on the **Minimum hours per week** line and use the drop-down lists to specify the minimum paid hours and minutes for which an employee should be scheduled.
9. Click **Edit** on the **Maximum non-overtime hours per day** line and use the drop-down lists to specify the maximum paid hours and minutes employees can work in a given day before they are in overtime.
10. Click **Add Type Entry** if you need to associate a Shift Template with this Schedule Type and refer to the next procedure in this section.
11. Click **Save**.

Multiple Shift Templates can be added to a Schedule Type, and the same Shift Template can be used with multiple Schedule Types. To add a Shift Template to a Schedule Type:

1. Click the **Configuration** tab and expand **Scheduling** in the left navigation menu.
2. Click **Schedule Types** and then click **Add Type Entry** under the desired Schedule Type.
3. Click **Edit** on the **Shift template line** and select a template from the drop-down list.
4. Select the appropriate check box(es) for the **Days** on which the template can be used.
5. Click **Edit** on the **Start of starting range** line and use the drop-down lists to specify the earliest time a shift can start (relative to midnight).
6. Click **Edit** on the **End of starting range** line and use the drop-down lists to specify the latest time a shift can start (relative to midnight).
7. Click **Edit** on the **Start granularity in minutes** line and use the drop-down list to specify when within the hour shifts can begin. For example, a setting of 60 minutes will result in every shift beginning on the hour; a setting of 15 minutes can result in shifts beginning on the quarter hour.

Note: To create a fixed shift starting time, set **Start of starting range** and **End of starting range** to the same value and leave **Start granularity in minutes** set to the default. Placing a value of zero (0) in this field will cause the schedule to error and not process correctly.

8. Click **Save**.

To remove a Shift Template from a Schedule Type:

- Follow steps 1 and 2 of the procedure above. Click **Remove** next to the desired template and then click **Save**.

Schedule Types can be deleted as long as they are not assigned to any employees. To delete a Schedule Type:

- Follow steps 1 and 2 of the procedure above. Click **Remove** next to the desired shift template and then click **Save**.

Configure Business Closures

Business closures are dates and times when you know employees do not need to be scheduled. These may include holidays (such as New Year's Day or the Fourth of July in the United States); days when employees will be at a company meeting; office or employee relocations, etc. If an office is closed one day each month (e.g., the first weekday of the month), configure those days as Business Closures. If an office is closed the same day each week, do not check that day on the Schedule Type(s).

Annual holidays must be entered each year. If a Business Closure affects multiple Locations, you must create a separate closure for each Location. If you add a Business Closure for a time frame during which employees are already scheduled at that Location, Clarity displays a warning message. Business Closures display at a user's Location on the Edit Calendar and Edit Schedule pages, and Clarity will not allow users to manually add shifts during those times.

To add a Business Closure:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Business Closures**.
3. Click the **Date** field and select a day from the calendar.
4. Select a **Start Time** and an **End Time** from the drop-down lists.
5. Select a **Location** from the drop-down list.
6. If you wish to **Override schedules' minimum hours requirements for this closure**, select the check box.
7. Click **Add**.

You can sort the list of Business Closures by clicking any column header. The arrows will display according to ascending or descending order.

Once a closure date has passed, you can delete the closure without affecting historical schedules. To delete a Business Closure:

- Follow steps 1 and 2 of the procedure above, then click **Delete** in the row for the desired Business Closure.

Configure PTO Blackout Dates

You can specify a date or date range during which PTO requests are limited. Once the PTO request limit has been reached, blackout dates appear as black on all employee schedules, and are labeled with the information you enter in the **Description** field. You may therefore find it helpful to include the phrase "PTO Blackout" or something similar in the description.

18	19	20	21	22	23	24
	<div style="background-color: #e0e0e0; padding: 2px;">1a Shift</div> <div style="background-color: #ffcc99; padding: 2px;">3a PTO/Vacation</div>	12a PTO Blackout: Two-Day Sale				

To configure PTO Blackout Dates:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **PTO Blackout Dates**.
3. Enter a **Description**.
4. Enter a **Start Date** and an **End Date** for the blackout period.
5. Enter the **Maximum Allowed PTO Requests** that may be submitted during the blackout period and click **Add**.

You can sort the list of PTO Blackouts by clicking the column header for **Description**, **Start Date**, or **End Date**. The arrows will display according to ascending or descending order.

Once a blackout period has passed, you can delete it without affecting historical schedules. To delete a PTO Blackout:

- Follow steps 1 and 2 of the procedure above, then click **Delete** in the row for the desired blackout period.

Permissions, Roles and Accounts

Permissions, roles, and accounts work together as key security features in Clarity. Consider:

- Employees must have user **accounts** in order to be scheduled and tracked on the Real Time Roster, even if they will never log in to Clarity themselves.
- A user account allows an employee to log in to Clarity, assuming that the employee knows the username, password, and Clarity URL. However, with no **role** assigned, the employee would see only the Home tab with his employee profile information, could not see his schedule, and could not perform any actions.
- **Permissions** are assigned to roles and specify the actions that can be performed by users with that role.

When Discover and Clarity are installed together, user account information is stored in the same database.

Users can log in to each application if they know their account names, passwords, and the application URLs. In other words, users can log in to Clarity and then access Discover without logging in again and vice versa. In order to access any functionality in either application, they must be assigned roles.

Both Discover and Clarity allow logging in with Windows credentials when correctly configured with Active Directory integration. Some organizations allow users to log in with either their Windows credentials or a Discover/Clarity account. If your organization uses only Windows-based logins, passwords should be managed through your Active Directory solution and *not* through Clarity. See the "Security" section in the *Uptivity Discover Administration Manual* for more information.

Role design varies by the needs of the organization. Two common role design strategies are user-based and task-based.

User-based roles include all permissions typically needed by a specific user (e.g., employee, supervisor, system administrator). For example, a supervisor may need to view the Real Time Roster, create schedules, and create users.

Task-based roles focus on tasks, not users. A task-based role can be Manage Users with the permission to create users and schedules. Another task can be Monitor a Shift with permission to view the roster and real-time reports. Multiple roles can be assigned to the same user.

The steps for creating roles and user accounts vary depending on whether or not Discover is installed with Clarity. In hybrid Discover/Clarity systems, Roles are shared across applications and are managed from Discover. The Discover **Roles** page will open automatically when you click **Roles** from Clarity. Refer to the *Uptivity Discover Administration Manual* for further information on configuring roles in a hybrid system. This section explains how to manage roles in a Clarity standalone system.

Note: Agents may log in to multiple devices (e.g., ACDs), but Clarity can tie each user account to only one ACD. If users must be tracked for each login, a separate Clarity account must be created for each login.

About Permissions & Roles

Permissions in Clarity are best understood in the context of the tasks to which they relate. Very few Clarity tasks require only a single permission.

Most contact centers include supervisors (team leads) who need access to different levels of information and functionality than does a regular employee (agent). Some supervisors need access to just their individual team, while others may need access to multiple teams or to all employees. Clarity lets you assign permissions to support these scenarios, so it's important to understand the following:

- Many permissions offer both "All" and "Team" versions (e.g. Employee Schedule All View and Employee Schedule Team View).
- Employee searches in Clarity can only be done by users who have three permissions in combination: Employee Section, Employee Search, and either Employee Profile All View or Employee Profile Team View. This is an important basic permission set for team leads and above, since many actions can only be performed from the search results window.
- "All" permissions override "Team" permissions. A supervisor with the Employee Schedule All View permission will be able to view schedules for all employees, including members of their team(s).
- "Team" permissions **only** apply to users who are configured as Supervisors of that Team. The user's account must have the **Can Be Supervisor** check box selected for that user to be assigned as a Team Supervisor. For more information on assigning Supervisors to Teams, see [Configure Teams](#). For more information regarding who can be a Supervisor, see [About Employee Accounts](#).

- "Team" and "All" permissions can be used in combination, and supervisors can be assigned "All" permissions when appropriate. For example, a supervisor might have the Employee Profile All View and Employee Schedule Team View permissions. This would allow them to see any/all employees in search results, but only view schedules for members of their assigned team.
- One Team can have multiple supervisors and one supervisor can be assigned to multiple Teams. However, each user can be a member of only one Team.
- The "Team" and "All" permissions for Add Leave Request, Leave Request Approval, Schedule and PTO Page **do not** automatically give you the ability to act on yourself. In other words, supervisors with the Employee Schedule Team Edit permission cannot edit their own schedules. This is true even if the supervisor is a member of the team. You can only act on yourself if you have specific rights to do so via a "Self" permission.
- The "All" permissions for Profile View, Roster, and Swap Request Approval **do** automatically give you the ability to act on yourself. "Self" permissions are not required. In other words, supervisors with the Swap Request Approval All permission could approve their own shift swap requests. For this reason, "All" permissions should be limited to a select group.
- The "Team" permissions for Profile View and Roster **do** automatically give supervisors the ability to act on themselves if they are members of their team(s). "Self" permissions are not required. For this reason, supervisors should not typically be members of the teams they supervise.
- Titles included in an employee's profile are for search/filter purposes only. Entering "Supervisor" in the Title field on an employee's profile does **not** mean Clarity will view that person as a supervisor.

Following are some examples of typical roles within a contact center. Each example role lists tasks commonly associated with that role, and the Clarity permission set required to complete each of those tasks. Because some permissions/permission sets may affect multiple tasks, the permissions required for the role are also summarized for easy reference.

About Superuser Access

Most organizations have at least one manager or administrator who should be able to perform nearly all Clarity functions on behalf of all (or nearly all) users. Clarity does provide the option of designating a user as a "superuser" when you are creating the user account. Superuser access is not a role and can only be granted to individual users. Because of the powerful nature of superuser access, and the potential for misuse, the preferred method is to create roles with the minimum necessary permissions to accomplish the desired tasks, and assign those roles to the appropriate users. Superusers must still have the **Can Be Supervisor** check box selected in their user account to be made supervisor of a Team.

Example Role: Agent/Employee

In many organizations, basic agents should be able to perform just these tasks:

- Log in to Clarity.
 - Requires a Clarity user account but no specific permissions.
- Change their password and/or request a forgotten password.
 - Requires Allow Change Password permission (or Allow Password Changes in the Discover Web Portal).
- View (but not change) their schedule.
 - Requires Employee Schedule Self View permission.
- Request leaves and schedule swaps from their own schedule.
 - Requires Employee Schedule Self View permission.
- View their pending requests and leave history, as well as make and cancel leave requests, from their own PTO tab.
 - Requires Employee Schedule Self View and PTO Page Self Edit permissions.
- View (but not change) their own profile information – Name, Labor Units, Teams, Skill sets, etc. but not Roles or Schedule Types.
 - Requires a Clarity user account but no specific permissions.
- Customize their Clarity dashboard by adding, viewing or deleting Clarity widgets.
 - Requires the Home Page Widgets permission.

To meet this need, create and assign a Role with these permissions to agents:

- Allow Change Password (or Allow Password Changes in the Discover Web Portal)
- Employee Schedule Self View
- PTO Page Self Edit
- Home Page Widgets

Following are tasks which may or may not be performed at the agent level. Permissions required for these tasks may already be contained in the Role's basic permission set.

If your organization uses the Schedule Bidding feature, add this permission to allow agents to bid for schedules:

- Employee Self Edit (additional conditions also apply; see the "Bid for Schedules" section of the *Uptivity Clarity User Manual* for more information).

If your agents should be able to edit their own profiles, they need these permissions:

- Allow User Admin (or Allow User Administration in the Discover Web Portal)
- Employee Section
- Employee Self Edit

Note: If agents have permission to edit their own profiles, they can also edit their own password even if they do not have the Allow Change Password permission.

If your agents should be able to edit their own schedules, they need these permissions:

- Employee Schedule Self Edit
- Employee Section

Example Role: Team Lead/Supervisor

In many organizations, a first-level supervisor or team lead oversees one or more teams. This person would typically perform all the tasks discussed in [Example Role: Agent/Employee](#) and should also be able to perform these tasks:

- View schedules for team members.
 - Requires Employee Section, Employee Search, Employee Profile Team View, and Employee Schedule Team View permissions.
- Edit schedules for team members on the team member's Schedule tab or on the Overview report.
 - Requires Employee Section, Employee Search, Employee Profile Team View, and Employee Schedule Team Edit permissions.
- View pending requests and leave history for team members.
 - Requires Employee Section, Employee Search, Employee Profile Team View, Employee Schedule Team View (or Team Edit) and PTO Page Team View permissions.
- View profile information for team members.
 - Requires Employee Section, Employee Search, and Employee Profile Team View permissions.
- Edit profile information for team members.
 - Requires Employee Section, Employee Search, Employee Profile Team View, and Allow User Administration permissions.
- Approve leave requests for members of their team(s) from the team member's Schedule or PTO tab, and/or from the Overview report.
 - Requires Leave Request Approval Team permissions, in addition to permissions required to view/edit the Schedule tab, PTO tab, and/or Overview report.
- Approve schedule swap requests for members of their team(s).
 - Requires Reports Section, Reports Processes, Leave Request Approval Team, and Swap Request Approval Team permissions.
- View the Real Time Roster for their team(s).
 - Requires Reports Section, Reports Real Time, and Roster Team permissions.

- View the Overview and/or Adherence reports for their team(s).
 - Requires Reports Section, Employee Section, Employee Search, and Employee Schedule Team View permissions.

To meet this need, create and assign a Role with these permissions to team lead(s). You will also need to configure the team lead as a Supervisor for the desired team(s). For more information on assigning Supervisors to teams, see [Configure Teams](#). For more information regarding who can be a Supervisor, see [About Employee Accounts](#).

- Allow Change Password (or Allow Password Changes in the Discover Web Portal)
- Allow User Admin (or Allow User Administration in the Discover Web Portal)
- Employee Section
- Employee Search
- Employee Schedule Self View
- PTO Page Self Edit
- PTO Page Team View
- Employee Profile Team View
- Employee Schedule Team Edit
- Leave Request Approval Team
- Swap Request Approval Team
- Reports Processes
- Reports Section
- Reports Real Time
- Roster Team
- Home Page Widgets

Following are tasks which may or may not be performed at the team lead level. Some of the permissions required for these tasks may already be contained in the basic permission set in the Role described above.

If team leads should be able to enter leave requests and/or record call offs for their team members from the team member's Schedule tab, PTO tab, and/or the Overview report, they need these permissions:

- Add Leave Request Team
- Permissions to view/edit the Schedule tab, PTO tab, and/or Overview report

If team leads should be able to use historical widgets, they need these permissions:

- Reports Section
- Reports Historical
- Historical Widgets

If team leads should be able to use real-time widgets, they need these permissions:

- Reports Section
- Reports Real Time
- Real Time Widgets

If team leads should be able to use ad hoc reports, they need these permissions:

- Reports Section
- Allow Clarity Ad Hoc Reporting

If team leads should be able to create report subscriptions for Clarity ad hoc reports, they need these permissions:

- Reports Section
- Allow Clarity Ad Hoc Reporting
- Allow Report Subscriptions

If team leads should be able to create shared schedules for use with report subscriptions, they need these permissions:

- Reports Section
- Allow Report Subscriptions

If team leads should be able to add items to the News Widget, they need these permissions:

- Home Page Widgets
- Edit News Widget

Example Role: Scheduler

In many organizations, one person creates schedules for the contact center and performs related tasks like forecasting, but may or may not supervise employees. A dedicated "scheduler" would typically perform all the tasks discussed in [Example Role: Agent/Employee](#) and would also need to perform these tasks:

- Create, trend, analyze and manage forecast data sets.
 - Requires Forecast Section, Forecast Acquire, Forecast Trend, and Forecast Predict permissions.
- Create and publish schedules.
 - Requires Schedule Section, Schedule Load, Schedule Create, and Schedule Publish permissions.
- Create and publish bidding schedules.
 - Requires Schedule Section, Schedule Bidding, Schedule Load, Schedule Create, and Schedule Publish permissions.
- Add, view, or delete the Scheduler widget on their Home tab.
 - Requires Home Page Widgets and Schedule Create permissions.

To meet this need, create and assign a Role with these permissions to schedulers:

- Allow Change Password (Allow Password Changes in the Discover Web Portal)
- Employee Schedule Self View
- PTO Page Self Edit
- Home Page Widgets
- Forecast Section
- Forecast Acquire
- Forecast Predict
- Forecast Trend
- Schedule Section
- Schedule Create
- Schedule Load
- Schedule Publish
- Schedule Bidding

Example Role: Manager/Administrator

Most organizations have one person, or a relatively small team of people, who should be able to administer Clarity users and the Clarity application itself. This person would typically perform all the tasks discussed in [Example Role: Agent/Employee](#) as well as the following tasks:

- View profile information for all employees.
 - Requires Employee Section, Employee Search, and Employee Profile All View permissions.
- Edit profile information for all employees.
 - Requires Employee Section, Employee Search, Employee Profile All View, and Allow User Administration permissions.
- View pending requests and leave history for all employees.
 - Requires Employee Section, Employee Search, Employee Profile All View, Employee Schedule All View (or All Edit), and PTO Page All View permissions.
- Approve leave requests for all employees from the employee's Schedule or PTO tab, and/or from the Overview report.
 - Requires Leave Request Approval All permission, in addition to permissions required to view/edit the Schedule tab, PTO tab, and/or Overview report.
- Approve schedule swap requests for all employees.
 - Requires Reports Section, Reports Processes, Leave Request Approval All, and Swap Request Approval All permissions.
- View schedules for all employees.
 - Requires Employee Section, Employee Search, Employee Profile All View, and Employee Schedule All View permissions.
- Edit schedules for all employees on the employee's Schedule tab or on the Overview report.
 - Requires Employee Section, Employee Search, Employee Profile All View, and Employee Schedule All Edit permissions.
- Add users to Clarity.
 - Requires Employee Section and Employee Create permissions.
- Configure Clarity settings (e.g. add Supervisors to Teams, add new Skills, etc.)
 - Requires the Configuration Section permission.

- View the Real Time Roster for all employees.
 - Requires Reports Section, Reports Real Time, and Roster All permissions.
- View the Overview and/or Adherence reports for all employees.
 - Requires Reports Section, Employee Section, Employee Search, and Employee Schedule All View permissions.

To meet this need, create and assign a Role with these permissions to managers:

- Allow Change Password (or Allow Password Changes in the Discover Web Portal)
- Employee Section
- Employee Search
- Employee Profile All View
- Allow User Administration
- PTO Page All View
- PTO Page Self Edit
- Leave Request Approval All
- Swap Request Approval All
- Employee Schedule Self Edit
- Employee Schedule All Edit
- Home Page Widgets
- Configuration Section
- Employee Create
- Reports Section
- Reports Processes
- Reports Real Time
- Roster All

Following are tasks which may or may not be performed by managers/administrators. Permissions required for these tasks may already be contained in the Role's basic permission set.

If managers should be able to enter leave requests and/or record call offs for all employees from the employee's Schedule tab, PTO tab, and/or the Overview report, they need these permissions:

- Add Leave Request All
- Permissions to view/edit the Schedule tab, PTO tab, and/or Overview report

If managers should be able to use historical widgets, they need these permissions:

- Reports Section
- Reports Historical
- Historical Widgets

If managers should be able to use real-time widgets, they need these permissions:

- Reports Section
- Reports Real Time
- Real Time Widgets

If managers should be able to use ad hoc reports, they need these permissions:

- Reports Section
- Allow Clarity Ad Hoc Reporting

If managers should be able to create report subscriptions for Clarity ad hoc reports, they need these permissions:

- Reports Section
- Allow Clarity Ad Hoc Reporting
- Allow Report Subscriptions

If managers should be able to create shared schedules for use with report subscriptions, they need these permissions:

- Reports Section
- Allow Report Subscriptions

If managers should be able to add items to the News Widget, they need these permissions:

- Home Page Widgets
- Edit News Widget

Permissions Reference List

All of the Clarity permissions here are listed in alphabetical order. Some permission names are slightly different in the Discover and Clarity Web Portals, and those are noted accordingly.

Add Leave Request All

Add Leave Request Team

Allow Change Password (Allow Password Changes in hybrid systems)

Allow User Admin (Allow User Administration in hybrid systems)

Call Off

Configuration Section

Edit News Widget

Employee Create

Employee Profile All View

Employee Profile Team View

Employee Schedule All Edit

Employee Schedule All View

Employee Schedule Self Edit

Employee Schedule Self View

Employee Schedule Team Edit

Employee Schedule Team View

Employee Search

Employee Section

Employee Self Edit

Forecast Acquire

Forecast Predict

Forecast Section

Forecast Trend

Historical Widgets

Home Page Widgets

Leave Request Approval All

Leave Request Approval Team

PTO Page Self Edit

PTO Page All View

PTO Page Team View

Real Time Widgets

Report Subscription (Allow Report Subscriptions in the Discover Web Portal)

Reports Clarity Ad Hoc (Allow Clarity Ad Hoc Reporting in the Discover Web Portal)

Reports Historical

Reports Processes

Reports Real Time

Reports Section

Roster All

Roster Team

Schedule Bidding

Schedule Create

Schedule Load

Schedule Publish

Schedule Section

Swap Request Approval All

Swap Request Approval Team

Configure Roles

To create a Role:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Roles** and then click **New Role**.
3. Enter a unique **Name** for the Role.
4. Enter a **Description** for the Role if desired.
5. Click **Create New Role**.
6. Select the Role from the drop-down list.
7. Select the check box(es) for any permission(s) to be associated with this Role. For details about permissions, see [About Permissions & Roles](#).
8. Click **Save** and then **OK**.

To edit a Role:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Roles** and select the Role you wish to edit from the drop-down list.
3. Select the check box(es) for permission(s) to be added and/or clear the check box(es) for permission(s) to be removed.
4. Click **Save** and then click **OK**.

About Employee Accounts

If you have a hybrid Discover/Clarity system, it is best practice to create the Clarity employee account first since this also creates a Discover user account for that employee. If you create the user account in Discover first, the Clarity employee account will have missing fields and cannot be used until these fields are updated (for details, see [Mass Update Incomplete Users](#)).

Clarity optionally allows you to enter a wide variety of data about each employee. The following list of employee record fields and associated information will help you decide which fields are appropriate to use in your organization. Fields noted with an asterisk (*) are required. Fields that exist in both the Discover user account and Clarity employee account appear in **blue**.

- **First Name***
- **Last Name***
- **Title***: For related information, see [Configure Titles](#).
- **Location***: For related information, see [Configure Locations](#).
- **Employee ID**: This optional identifier can be a number used in other systems, such as HR or your PBX.
- **Labor Unit**: For related information, see [Configure Labor Units](#).
- **Team**: For related information, see [Configure Teams](#).
- **Username***: Used by the employee to log into Clarity; must be unique.
- **Password***: Used by the employee to log into Clarity. Clarity itself does not have any built-in password requirements or restrictions. If authentication is done via Active Directory, password length and other security measures are configured there.
- **Email***: A valid email address is required for every employee account. If you attempt to save the employee without an email address, Clarity will prompt you to enter one.
- **Phone**: Enter numbers only.

- **Active:** If this check box is not selected, the employee cannot access Clarity and is not available for scheduling. Any historical information would still appear on reports. Inactive employees can be reactivated.

Note: In hybrid Clarity/Discover systems, clearing the **Active** check box can cause the agent to lose access to both applications. In some cases, you may need to keep an agent's Discover access even if he/she will no longer be scheduled with Clarity. To accomplish this, leave the Active check box selected, but deselect the Labor Unit associated with the agent and set the Device to <None>. This removes the agent from any scheduling and Real Time Roster pages, but leaves the account intact.

- **Superuser:** Selecting this check box provides unlimited access to Clarity and Discover, if applicable. Grant this status only when absolutely necessary.
- **Can Be Supervisor:** Selecting this check box causes the employee to appear in the list of available Supervisors during Team configuration.
- **Schedule Type:** Required for any employee who should be automatically scheduled by Clarity.
- **Labor Time Zone:** Enter the employee's work time zone if it differs from that of the employee's assigned Location.
- **Roles:** Multiple Roles are permitted; for related information, see [About Permissions & Roles](#).
- **Skills:** Multiple Skills are permitted; for related information, see [Configure Skills](#).
- **Device:** For related information, see [About Devices](#).

- **Device Unique ID:** Enter the unique login ID for the employee on the Device, such as logid, TelsetLoginID, etc. The Device and Device Unique ID combination must be unique to the agent. If it is not and you attempt to save the agent, Clarity will warn you that the Device Unique ID is already in use and will not allow you to save the duplicated values.

Device Unique IDs by Integration Type	
Avaya CMS	Login
Avaya AACC	TelsetLoginID
Cisco UCCX	resourceLoginID
Cisco UCCE	SkillTargetID (Take from Agent Table)
ShoreTel Contact Center	Agent_id
ShoreTel Director	AgentDN
Zeacom Contact Center	Loginid

- **Cell Phone**
- **Cell Carrier:** Required for Clarity to send text messages to the employee.
- **Enable SMS:** Select this check box for Clarity to send text messages.
- **Upload New Photo:** If employee photos will be included in the profile, the photo must be on your PC or an accessible network drive, and must be in GIF, PNG, or JPEG format. Photos are uploaded to the Clarity\Content\Images directory, and the IIS_IUSRS account on the Clarity server must have read and write permissions to this directory.

Configure Employee Accounts

To create an employee account:

1. Click the **Employees** tab and then click **Create**.
2. Complete the employee record fields used in your organization.
3. If you want to include a photo, click **Upload New Photo**, navigate to the desired image file, and then click **Open**.
4. Click the small **Create** button.

To edit an employee account:

1. Click the **Employees** tab and then click **Search**.
2. Enter one or more criteria items that identify the employee and click the smaller **Search** button.
3. Locate the employee in the **Search Results** list and click **Edit**.
4. Edit the values as needed and then click **Save**. To add an employee photo or change the existing photo, click the photo/placeholder. Navigate to the desired image file, and then click **Open**.

Import Employees (hybrid Discover/Clarity systems only)

For hybrid systems, employees can be imported in batches using the Import Users function in Discover. If you have a database or Excel spreadsheet of agents, you may be able to generate a CSV data file. That information can be imported into Discover, then migrated to and updated in Clarity, saving time by minimizing data entry tasks. You may include roles in the CSV file but are not required to do so.

A file must be in the following format: username, password, locked, first_name, last_name, email, system_username, system_domain, employee_id, site_id, phone1;phone2;phone3;, role1;role2;role3;

To import a CSV file of employees in a hybrid Discover/Clarity system:

1. In the Discover Web Portal, click the **Administration** tab and expand **Permissions** in the left navigation menu.
2. Click **Users** and then click **Import Users**.
3. Click **Select**.
4. Browse to locate and open the file.
5. If the CSV file contains a heading row (Name, Title, Position, etc.), select the check box for **Import file has a header:** to ignore this row during import. Click **Upload File**.
6. When the upload is complete and the file has been parsed successfully, follow the procedure to [Mass Update Incomplete Users](#).

Mass Update Incomplete Users (hybrid Discover/Clarity systems only)

Users created in, or imported via, Discover do not have many of the information fields required for Clarity scheduling and roster reporting. As those users are created, they appear on the Mass Update list and must be updated.

In the **Roles** section of the **Update Incomplete Users** screen, the drop-down list displays available roles in alphabetical order. Even if you do not select a Role in this screen (for example, you may have already assigned Roles in Discover), Clarity still assigns the displayed Role to the employee.

To avoid this, select an appropriate Role for every employee before updating. If the Role has already been assigned to the employee, you will see a warning message but the employee will update successfully.

To update incomplete users:

1. Click the **Configuration** tab and expand **Miscellaneous** in the left navigation menu.
2. Click **Mass Update Incomplete Users**.
3. Enter the missing information for each user. For details, see [About Employee Accounts](#).
4. Click **Update Selected**.

Appendix: Time Zones

Clarity stores times in UTC (Coordinated Universal Time). The table below shows the offset between time zones. For example EST is UTC-05:00 so 8:00PM UTC is 3:00PM EST.

Name of Time Zone	Time
Dateline Standard Time	(UTC-12:00) International Date Line West
Samoa Standard Time	(UTC-11:00) Midway Island, Samoa
Hawaiian Standard Time	(UTC-10:00) Hawaii
Alaskan Standard Time	(UTC-09:00) Alaska
Pacific Standard Time	(UTC-08:00) Pacific Time (US and Canada); Tijuana
Mountain Standard Time	(UTC-07:00) Mountain Time (US and Canada)
Mexico Standard Time 2	(UTC-07:00) Chihuahua, La Paz, Mazatlan
U.S. Mountain Standard Time	(UTC-07:00) Arizona
Central Standard Time	(UTC-06:00) Central Time (US and Canada)
Canada Central Standard Time	(UTC-06:00) Saskatchewan
Mexico Standard Time	(UTC-06:00) Guadalajara, Mexico City, Monterrey
Central America Standard Time	(UTC-06:00) Central America
Eastern Standard Time	(UTC-05:00) Eastern Time (US and Canada)
U.S. Eastern Standard Time	(UTC-05:00) Indiana (East)
S.A. Pacific Standard Time	(UTC-05:00) Bogota, Lima, Quito
Atlantic Standard Time	(UTC-04:00) Atlantic Time (Canada)
S.A. Western Standard Time	(UTC-04:00) Caracas, La Paz
Pacific S.A. Standard Time	(UTC-04:00) Santiago
Newfoundland and Labrador Standard Time	(UTC-03:30) Newfoundland and Labrador
E. South America Standard Time	(UTC-03:00) Brasilia

S.A. Eastern Standard Time	(UTC-03:00) Buenos Aires, Georgetown
Greenland Standard Time	(UTC-03:00) Greenland
Mid-Atlantic Standard Time	(UTC-02:00) Mid-Atlantic
Azores Standard Time	(UTC-01:00) Azores
Cape Verde Standard Time	(UTC-01:00) Cape Verde Islands
UTC	(UTC) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London
Greenwich Standard Time	(UTC) Casablanca, Monrovia
Central Europe Standard Time	(UTC+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague
Central European Standard Time	(UTC+01:00) Sarajevo, Skopje, Warsaw, Zagreb
Romance Standard Time	(UTC+01:00) Brussels, Copenhagen, Madrid, Paris
W. Europe Standard Time	(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
W. Central Africa Standard Time	(UTC+01:00) West Central Africa
E. Europe Standard Time	(UTC+02:00) Bucharest
Egypt Standard Time	(UTC+02:00) Cairo
FLE Standard Time	(UTC+02:00) Helsinki, Kiev, Riga, Sofia, Tallinn, Vilnius
GTB Standard Time	(UTC+02:00) Athens, Istanbul, Minsk
Israel Standard Time	(UTC+02:00) Jerusalem
South Africa Standard Time	(UTC+02:00) Harare, Pretoria
Russian Standard Time	(UTC+03:00) Moscow, St. Petersburg, Volgograd
Arab Standard Time	(UTC+03:00) Kuwait, Riyadh
E. Africa Standard Time	(UTC+03:00) Nairobi
Arabic Standard Time	(UTC+03:00) Baghdad
Iran Standard Time	(UTC+03:30) Tehran

Arabian Standard Time	(UTC+04:00) Abu Dhabi, Muscat
Caucasus Standard Time	(UTC+04:00) Baku, Tbilisi, Yerevan
Transitional Islamic State of Afghanistan Standard Time	(UTC+04:30) Kabul
Ekaterinburg Standard Time	(UTC+05:00) Ekaterinburg
West Asia Standard Time	(UTC+05:00) Islamabad, Karachi, Tashkent
India Standard Time	(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi
Nepal Standard Time	(UTC+05:45) Kathmandu
Central Asia Standard Time	(UTC+06:00) Astana, Dhaka
Sri Lanka Standard Time	(UTC+06:00) Sri Jayawardenepura
N. Central Asia Standard Time	(UTC+06:00) Almaty, Novosibirsk
Myanmar Standard Time	(UTC+06:30) Yangon Rangoon
S.E. Asia Standard Time	(UTC+07:00) Bangkok, Hanoi, Jakarta
North Asia Standard Time	(UTC+07:00) Krasnoyarsk
China Standard Time	(UTC+08:00) Beijing, Chongqing, Hong Kong SAR, Urumqi
Singapore Standard Time	(UTC+08:00) Kuala Lumpur, Singapore
Taipei Standard Time	(UTC+08:00) Taipei
W. Australia Standard Time	(UTC+08:00) Perth
North Asia East Standard Time	(UTC+08:00) Irkutsk, Ulaanbaatar
Korea Standard Time	(UTC+09:00) Seoul
Tokyo Standard Time	(UTC+09:00) Osaka, Sapporo, Tokyo
Yakutsk Standard Time	(UTC+09:00) Yakutsk
A.U.S. Central Standard Time	(UTC+09:30) Darwin
Cen. Australia Standard Time	(UTC+09:30) Adelaide
A.U.S. Eastern Standard Time	(UTC+10:00) Canberra, Melbourne, Sydney
E. Australia Standard Time	(UTC+10:00) Brisbane
Tasmania Standard Time	(UTC+10:00) Hobart

Vladivostok Standard Time	(UTC+10:00) Vladivostok
West Pacific Standard Time	(UTC+10:00) Guam, Port Moresby
Central Pacific Standard Time	(UTC+11:00) Magadan, Solomon Islands, New Caledonia
Fiji Islands Standard Time	(UTC+12:00) Fiji Islands, Kamchatka, Marshall Islands
New Zealand Standard Time	(UTC+12:00) Auckland, Wellington
Tonga Standard Time	(UTC+13:00) Nuku'alofa

Document Revision History

Revision	Change Description	Effective Date
0	Initial release for this version	2015-02-13