



UPTIVITY CLARITY WFM USER MANUAL, V5.5.1

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Introduction

Audience

This document is written for agents, team leads, supervisors and schedulers who use Uptivity Clarity WFM. The [Introduction](#) and [Manage Your Clarity](#) sections are applicable to all users. Beginning with the [Manage Employees](#) section, the information is applicable to users at the team lead level or above.

Readers should have a basic level of familiarity with contact center business concepts, 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 use Uptivity Clarity WFM as part of your daily work.

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. It also assumes that your Clarity application administrator has configured the application for use based on your business rules and environment.

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. inContact 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.

Permissions in Clarity are very granular. If you need to perform a task and are unable to do so, see your supervisor or Clarity administrator.

Clarity Terminology

Clarity uses a variety of fields that are set by your system administrator. To use Clarity, you will need to understand these fields and the 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 Supervisors](#).
- **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.

Manage Your Clarity

This section explains how to perform a variety of basic tasks with Clarity that are typically common to agents and supervisors. These include logging in, password management, dashboard management, and using Clarity to view your own schedule and make schedule requests.

Login

Note: These instructions assume user log in to Clarity. See the "Roles, Permissions, and Accounts" section of the *Uptivity Clarity Administration Manual* and the *Uptivity Discover Web Player Manual* for alternative login methods.

Your system administrator or manager should provide you with the necessary information to log into Clarity: username, initial password, possibly a login mode, and the URL or link to the portal.

Clarity does not support browser-based saving of your username for security reasons. You will need to enter your username at each login. Passwords are case-sensitive.

To log in:

1. In your web browser, type the URL (hostname or IP address) of the site into the address bar (for example, <http://clarityserver.yourcompany>).
2. Enter your Clarity username and password.
3. Click **Login**. Clarity opens to the last page you accessed. For a first time login, it opens to the Home tab.

If your login fails, you will be presented with the following error: "An invalid username or password was used."

To attempt another login, you should:

- Check that Caps Lock is not on.
- Check that you have the correct username, password, and login mode.

Note: If you fail to log in after three or more attempts, you may be locked out of the system and have to contact the system administrator. Instead, after two login failures, use the Forgot Password feature if you have the appropriate permissions.

Forgot Password Feature

Note: This feature does not work if your account has been locked due to login failures and/or you do not have the "Allow Password Changes" permission.

If you forget your password, you can use the Forgot Password feature on the login page. Your password will be reset, and a temporary password will be e-mailed to you if you use this option.

To use the feature:

1. Click the **Forgot Password** link on the login screen.
2. On the page, enter the username and click **Submit**.

If the reset is successful, you will see the following message: "A new password has been generated and sent to your email address." Once you have logged into the system, you will be required to change your password.

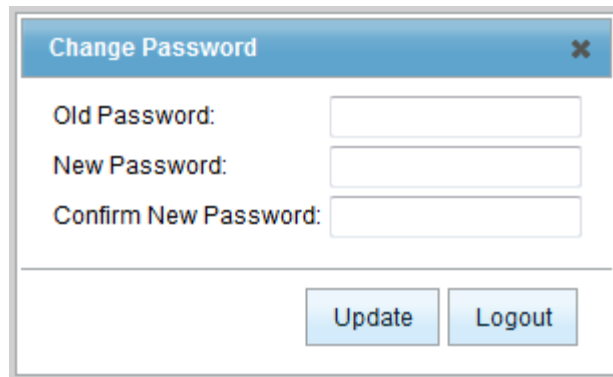
If the reset fails, you will see this message: "User does not exist, or email address not available." If you do not have proper permissions, you will receive an email with this message: "Someone has submitted a request for a new password for the Uptivity account linked to this email address. Your account does not have the appropriate permissions to generate a new password. Contact your Uptivity system administrator to generate a new password." In either case, contact your Clarity system administrator to resolve the issue.

Locate Version Number

The version number for your Clarity software appears in the upper-right corner of the login page. This version number can be useful for locating correct documentation for your software and when obtaining support for your system.



Change Your Password

A screenshot of a web application dialog box titled "Change Password". The dialog has a blue header bar with the title and a close button (X). Below the header, there are three text input fields: "Old Password:", "New Password:", and "Confirm New Password:". At the bottom of the dialog, there are two buttons: "Update" and "Logout".

If your organization allows users to manage their own passwords, follow these steps to change your password:

1. Click the **Change Password** link in the upper right-hand corner of any page.
2. On the Change Password page, enter a new password, and then retype the password in the Confirm New Password field.
3. Click **Save**.

Log Out

Once you have completed your session, it is very important to log out for security purposes. To log out, click the **Logout** link located at the top-right of every page. You will be returned to the login page.

Update Viewing Time Zone

By default, Clarity displays time based on your location. Sometimes you may need to view schedules based on a different time zone. For example, when a Supervisor creates a schedule and employees are in a different time zone, the Supervisor can change the time zone to that of the employees to see the schedule the way the employees will see it.

To change the viewing time zone:

1. Click **User Settings** from any page.
2. Select a time zone from the drop down menu.
3. Click **Save**. This time zone remains in effect until you change it.

Update Your Employee Information

You can see whether your Clarity account information is accurate and you can update it if your organization allows users to edit their own information. Some fields, such as username, cannot be edited.

To update your employee information:

1. On your **Home** tab, click **View Schedule**.
2. In the account information area, click **Edit**.
3. Edit each field as needed (talk to your Clarity administrator or see the "Create an Employee" section of the *Uptivity Clarity Administration Manual* for field definitions).
4. Click **Save** or, if changes are not needed, click the X in the top right corner of the **Edit Employee Information** box.

Add or Remove a Widget

You can add, remove and re-add widgets as needed. You can also move widgets around the **Home** tab by clicking the top of the widget and dragging. Any changes you make to the Home tab are saved when you log out. The next time you log in to the system, the tab will appear just as you left it.

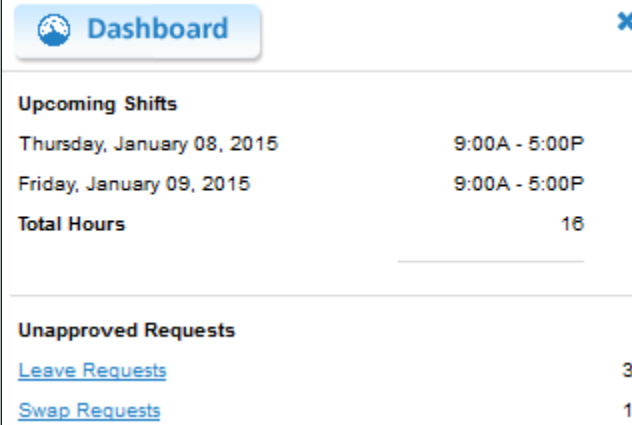
Note Do not use the **Blank** widget.

To add a widget:

1. On your **Home** tab, click the **Add widget** link.
2. Select a widget.
3. Click **Add**.

To remove a widget, click the X in the top right corner of that widget.

Dashboard Widget



The screenshot shows a 'Dashboard' widget with a close button (X) in the top right corner. It is divided into two sections. The first section, 'Upcoming Shifts', lists two days: Thursday, January 08, 2015 (9:00A - 5:00P) and Friday, January 09, 2015 (9:00A - 5:00P), with a 'Total Hours' of 18. The second section, 'Unapproved Requests', shows 3 'Leave Requests' and 1 'Swap Requests'.

| Upcoming Shifts | |
|----------------------------|---------------|
| Thursday, January 08, 2015 | 9:00A - 5:00P |
| Friday, January 09, 2015 | 9:00A - 5:00P |
| Total Hours | 18 |

| Unapproved Requests | |
|--------------------------------|---|
| Leave Requests | 3 |
| Swap Requests | 1 |

All users have a default **Dashboard** widget that shows **Upcoming Shifts**: the start and end time for each day they are scheduled for the next week.

Supervisors can see the number of **Unapproved Requests** for their Team(s). This includes leave requests with a status of Pending or Under Review, and shift swap requests with a status of Pending. Clicking the corresponding links opens the Processes Report. For details on the approval process, see [Manage Employee Shift Swap Requests](#) or [Manage Employee Leave Requests](#).

Facebook/Twitter Widgets

If these widgets are configured by the Clarity administrator, users can see text-only postings to a Facebook account and/or can receive tweets from one Twitter account. This feature allows Supervisors to communicate to employees both internally and externally using the same tool.

News Widget

The **News** widget displays announcements and the number of days since the announcement was posted. This feature can reduce the number of emails needed in your contact center, since postings are visible to every user who has access to the widget. Postings can be for things that affect all users, such as training events or requests for overtime volunteers. Users can be assigned permissions to read, edit, and add announcements.

To add an announcement:

1. In the **News** widget on your **Home** tab, click **Add News**.
2. Enter the announcement text in the dialog box (press Enter for line breaks) and click **Add**.

To edit or remove a posting:

1. In the **News** widget on your **Home** tab, click the **Edit** link for the posting you wish to change.
2. In the dialog box, either edit the text and click **Update** OR click **Remove**.

Note: Editing a posting does not change the posting date.

Scheduler Widget

The **Scheduler** widget allows users with appropriate permissions to access their own completed (but unpublished) Schedules, their own completed (but uninitiated) Bidding Schedules, and predictive reports such as Over/Under and Service Level reports. Manually-created Schedules are not available in the Scheduler widget. Once a schedule has been published, or the Bidding Period has been initiated for a Bidding Schedule, the link is no longer available in the Scheduler widget.

The links in the **Completed Schedules** section of the widget display as either Scheduler Report or Bidding Schedule, along with the date and time of the schedule's creation; names of saved schedules do **not** display. Click the corresponding links to load and view the schedules.

View Schedules

Clicking **Schedule** on your **Home** tab will automatically take you to the **Employees** tab with your own schedule as the default view.

The screenshot displays the Scheduler Widget interface. At the top, it shows employee details: Employee ID: 7504, Name: Daniel Ayala, Title: Employee, Location: Default Location, Phone: , and Email: dayala@abcindustries.com. Below this, there are tabs for 'Schedule' and 'PTO'. The 'Schedule' tab is active, showing 'Activities: Lunch, Break, Meeting' and 'Leave Requests: PTO/Vacation, FMLA'. There are buttons for 'Monthly', 'Weekly', 'Daily', and 'Edit'. A 'View Date:' field is set to 'Today'. The main area is a calendar for July 2014, with days of the week (Sun to Sat) and dates (1 to 31) displayed in a grid format.

If you have permissions to see schedules for other employees, you will see an employee list in the **Search** pane to the left of your schedule. For more information on using the **Search** pane, see [Manage Employees](#).

The schedule you see is based on the current day's date. From here, depending on your permissions, you can:

- Click the **Monthly**, **Weekly**, and **Daily** tabs to view the schedule.
- Navigate to a specific date by clicking **View Date** and selecting a day on the calendar.
- Navigate from one month, week, or day to another by using the blue left and right arrows.
- Go back to the current day by clicking **Today**.
- Click a schedule entry in **Monthly** or **Weekly** view to zoom to **Daily** view.
- Right-click a schedule entry to see details and options.
- Specify which items appear on the schedule by selecting items from the **Activities** and **Leave Requests** drop-down menus.

Request Leave

Depending on your permissions and your organization's policies, you may submit leave requests for yourself, a Supervisor may submit them for you, or either approach may be used depending on the type of leave. System administrators define the request types and whether a request must be approved by a Supervisor. You will receive an email when the status of a request changes. You can cancel your own leave requests before they have been approved, but not after.

You can request leave for two scenarios:

- Days with a scheduled shift (in other words, days on which you are assigned to work according to a published schedule). In this case, you can request either the full shift or part of the shift. When requesting a partial shift, you can only request consecutive hours in one request. In other words, to request 2 hours at the beginning of your shift and another 2 hours at the end, you would need to make two separate requests.
- Days with no scheduled shift (in other words, days for which you are eligible to work, but which are not covered by a currently-published schedule). For example, if you are configured in Clarity to be scheduled on any day from Monday through Saturday, and a schedule has been published in which you are not scheduled to work on Wednesday, you cannot enter a leave request for that Wednesday (since you are already off).

If you request leave on a day with no scheduled shift, you must request the entire day. If you are configured to work different shifts, you can specify the duration of the leave request. For example, if you can be scheduled for either a 4-hour or an 8-hour shift, you can select the shift for which you're requesting time off.

If you request leave for a partial shift, you can enter specific start and end times for the leave period. The minimum increment is 15 minutes.

You can request leave for dates in the past (for example, if you are out sick and you need to enter the sick day after you return to work).

You can request leave from either the Schedule tab or the PTO tab in your Employee Profile, and you can request multiple periods of leave in the same request.

Clarity allows you to enter two types of comments with your requests: comments that apply only to a specific leave request and comments that apply to all leave periods within a request.

Comments can be especially helpful when you request days with no scheduled shift. While your request must be for the entire day, you can use the comments to let the Supervisor know if you actually only need a specific time period within that day.

The screenshot shows the 'Add Leave Request' window. At the top, there is a search bar with the text 'Search for scheduled shifts and unscheduled working days'. Below this are two date input fields: 'Start Date' (10/29/2014) and 'End Date' (10/31/2014), with a 'Search' button to the right. The main area contains a list of dates with checkboxes and radio buttons for shift selection. The first entry is '10/29/2014' with a selected 'Full Shift' radio button. The second entry is '10/30/2014 08:00 AM - 12:00 PM' with a checked checkbox and selected 'Partial Shift' radio button. A pop-up window is open for this entry, showing 'Start Time' (10/30/2014 08:00 AM), 'End Time' (10/30/2014 12:00 PM), and 'Type' (PTO). Below the pop-up is a 'Comments' text area. The third entry is '10/31/2014' with a selected 'Full Shift' radio button. At the bottom of the main area is a 'Comments (applies to all shifts):' text area. The window has 'Cancel' and 'Submit' buttons at the bottom right.

To request leave:

1. Click **Schedule** on your Clarity Web Portal home page.

2. On the **Monthly** tab of the schedule, right-click the desired date for your leave (if you have a shift on that date, click within the desired date block but not on the schedule entry itself).

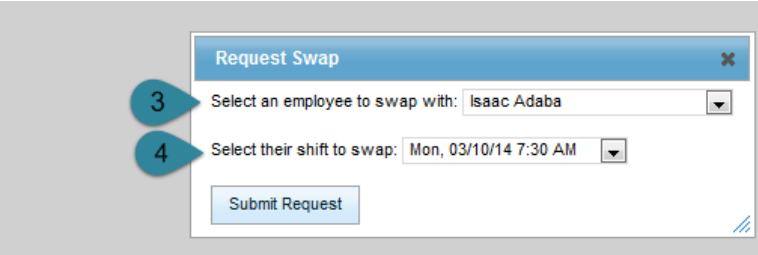
Alternative: Click the **PTO** tab.

3. Click **Request Leave**.
4. Use the **Start Date:** and **End Date:** fields of the **Add Leave Request** dialog box to enter the date range of your desired leave. Enter the same date in both fields to request a single day. If you started from the **Schedule** tab, these dates default to the date you selected. If you started from the **PTO** tab, the dates default to today's date.
5. Click **Search** to see a list of all scheduled shifts and valid working days outside published schedules within your selected range.
6. Select the check box for the desired leave date(s)
7. Select a **Type** of leave from the drop-down list.
8. If you are requesting time off on a day with a scheduled shift, select **Full Shift** or **Partial Shift**. Once you select **Partial Shift**, you will be able to enter the desired **Start Time** and **End Time** for your request. If you are requesting time off on a day with no scheduled shift, select the **Duration** if applicable.
9. In the **Comments** field, enter additional information if desired.
10. In the **Comments (applies to all shifts)** field, enter any information that would apply to multiple leave requests (if applicable), and click **Submit**.

Request Shift Swap

If desired, you can request to swap shifts with another employee who has the same Skills. For example, Employees 1 and 2 have Skills A and B. Employee 3 has Skills C and D. Employee 4 has Skills A, B, C, and D. Only employees 1 and 2 can swap shifts because they are the only ones with an exact match of Skills. Employees with no Skills assigned to their profiles will inherit Skills from the Labor Units to which they are assigned.

When two employees want to swap shifts, only one of them needs to submit the swap request. Once the request is submitted, Clarity emails notice of the request to the second employee, and gives them a chance to formally accept or decline. If the second employee agrees to the swap, the swap appears as a Pending Request in the Processes Report for approval by a Supervisor. Once the Supervisor approves the request, Clarity swaps the shifts in the schedule.



The image shows a screenshot of a software interface titled "Request Swap". It features two dropdown menus. The first dropdown is labeled "Select an employee to swap with:" and has "Isaac Adaba" selected. The second dropdown is labeled "Select their shift to swap:" and has "Mon, 03/10/14 7:30 AM" selected. Below these dropdowns is a button labeled "Submit Request". Two blue callout bubbles with the numbers 3 and 4 are positioned to the left of the dropdowns, pointing to them.

To request a shift swap:

1. On the **Weekly** or **Daily** tab of your schedule, right-click the schedule entry that you want to swap with another employee. On the **Monthly** tab, click within the desired date block but not on the schedule entry itself. Only future shifts or shifts currently in progress are eligible for swapping.
2. Click **Request Swap**.
3. From the drop-down list of eligible employees, **select an employee to swap with**.
4. From the drop-down list of that employee's shifts, **select their shift to swap**.
5. Click **Submit Request**.

View Your Leave Requests and History

The screenshot displays a user profile for Daniel Ayala (Employee ID: 7504) with contact information and a 'Request Leave' button. Below the profile, the 'Schedule' and 'PTO' tabs are visible. The 'Pending Requests' tab is active, showing a table of two pending requests: 'PTO/Vacation' and 'Call Off'. Each request has a 'Cancel' button in the 'Action' column. The table also includes columns for 'Leave Type', 'Leave Start', 'Leave End', and 'Status'. A pagination bar at the bottom indicates 'Pages 1' and 'Items per page (2)'.

| Leave Type | Leave Start | Leave End | Status | Action |
|--------------|-----------------------|-----------------------|---------|--------|
| PTO/Vacation | 10/30/2014 1:00:00 PM | 10/30/2014 5:00:00 PM | Pending | Cancel |
| Call Off | 8/6/2014 12:00:00 AM | 8/6/2014 11:59:00 PM | Pending | Cancel |

With the appropriate permissions, you can see your pending leave requests and leave history as recorded in Clarity.

The **Pending Requests** tab shows the current status of any leave requests that are pending or under review. You can sort pending requests by clicking in any of the column headers. You can also view (but not edit) any comments associated with a request by clicking the plus sign for that request.

To view your pending leave requests:

- On your **Home** tab in the Web Portal, click **Schedule**. Click the **PTO** tab at the top of the schedule and then click the **Pending Requests** tab.

To cancel a leave request that is Pending or Under Review:

- On the **PTO** tab, in the **Action** column, click **Cancel** for the desired request.

The **Leave History** tab shows all leave requests processed in Clarity that have been approved, declined or cancelled, beginning with the most recent. You can sort the display by clicking in any of the column headers, and you can filter by type of leave, status of request, and start date of request. You can also view (but not edit) any comments associated with a request by clicking the plus sign for that request.

To view your leave request history:

- On your **Home** tab in the Web Portal, click **Schedule**. Click the **PTO** tab at the top of the schedule and then click the **Leave History** tab.

Bid for Schedules

Schedule Bidding functionality in Clarity allows workforce administrators to create Bidding Schedules and then initiate a Bidding Period during which agents can review and bid for available shifts. The administrator then awards the shifts and publishes the schedule. Not all organizations use the Schedule Bidding feature.

When a Bidding Period is initiated for your Labor Unit, you'll receive notification that a new Bidding Schedule is available. This notification may be via email, text message, Twitter, or Facebook, depending on your organization. You may have multiple schedules available for bidding at any given time. You'll also see **Bid for Schedules** at the top of your **Home** tab. This button will appear as long as your Labor Unit has Bidding Schedules for which you have not entered bids. You must have appropriate permissions to bid for schedules; ask your Clarity administrator if you have questions.

| Bid for Schedules | | | | | | | Cancel | Save | Commit |
|---|--------------------|--------------------|--------------------|--------------------|------------|------------|--------|------|--------|
| Bid Schedule Name: Bid for 4/13 to 4/19 | | | | | | | | | |
| Mon Apr 14 2014 – Sun Apr 20 2014 | | | | | | | | | |
| Mon Apr 14 | Tue Apr 15 | Wed Apr 16 | Thu Apr 17 | Fri Apr 18 | Sat Apr 19 | Sun Apr 20 | Bid | | |
| 8:30 AM - 5:00 PM | 8:30 AM - 5:00 PM | 8:30 AM - 5:00 PM | 8:30 AM - 5:00 PM | 8:30 AM - 5:00 PM | | | No Bid | | |
| 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | | | No Bid | | |
| 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | | | No Bid | | |
| 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | | | No Bid | | |
| 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | | | No Bid | | |
| 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | | | No Bid | | |
| 9:30 AM - 6:00 PM | 9:30 AM - 6:00 PM | 9:30 AM - 6:00 PM | 9:30 AM - 6:00 PM | 9:30 AM - 6:00 PM | | | No Bid | | |
| 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | 12:00 PM - 8:30 PM | | | No Bid | | |
| 10:30 AM - 7:00 PM | 10:30 AM - 7:00 PM | 10:30 AM - 7:00 PM | 10:30 AM - 7:00 PM | 10:30 AM - 7:00 PM | | | No Bid | | |
| 8:30 AM - 5:00 PM | 8:30 AM - 5:00 PM | 8:30 AM - 5:00 PM | 8:30 AM - 5:00 PM | 8:30 AM - 5:00 PM | | | No Bid | | |

The Bid for Schedules page displays all shifts available in a given Bidding Schedule. You can rank shifts according to your preferences (i.e. "1" for your first choice, "2" for your second choice, etc.), and you can give multiple shifts the same rank. You don't have to bid on every shift. Once you commit your bids, you can't change them, nor can you bid for shifts you did not rank previously.

To bid for schedules:

1. Click your **Home** tab and then click **Bid for Schedules**.
2. In the **Bid** column, use the drop-down lists to rank your shift bids in order of preference.
3. Click **Save** to leave the Bid for Schedules page and return later or, if you are ready to submit your bids, click **Commit**.

Manage Employees

The tasks and procedures in this section are generally performed by Supervisors and require additional permissions. If you need to perform one of these tasks and are unable to do so, see your Clarity administrator. The results of some tasks may not appear until after the Clarity page has been refreshed.

About Supervisors

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 can include titles in an employee's profile, but these 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.

In order to act with regard to a Team in Clarity, you must be configured as a Supervisor by your Clarity administrator. 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. You may not be a member of the Team you supervise.

Many tasks can be limited to either an "All" or a "Team" level. For example, a Supervisor can be configured with the ability to view all employees or just members of their Team. The permissions affecting these tasks can be very granular. A Supervisor might be able to see any/all employees in search results, but only view schedules for members of their assigned Team.

Being a Supervisor does not automatically give you the ability to add or approve your own leave requests or edit your own schedule. Supervisors may have the ability to approve their own swap requests. If you need to perform a task and are unable to do so, talk to your Clarity administrator about how your account is configured.

Searches and Filters

The screenshot displays a software interface for searching and filtering data. At the top, there are navigation tabs: Real Time, Historical, Overview, Adherence, Processes, and Ad-Hoc. Below these is a section for 'Saved Search Criteria' which contains a table with columns for Name, Default, Type, Creator, and DateCreated. The table lists three criteria: 'JD' (Default: X, Type: Private), 'Jane' (Type: Public), and 'Supervisors' (Type: Public). Each row has 'Apply' and 'Delete' buttons. Below the table is a 'Search Criteria' section with input fields for First name, Last name, Title, Location, Employee ID, Labor Unit, Teams, and Active/Inactive. There are 'Clear', 'Search', and 'Save Search Criteria' buttons.

| Name | Default | Type | Creator | DateCreated | | |
|-------------|---------|---------|------------------------|-------------|-------|--------|
| JD | X | Private | CallCopy Administrator | 4/29/2013 | Apply | Delete |
| Jane | | Public | CallCopy Administrator | 4/29/2013 | Apply | Delete |
| Supervisors | | Public | CallCopy Administrator | 4/29/2013 | Apply | Delete |

The **Search** window shown here is available from the **Employees** tab, in [Schedule Overview](#) and [Schedule Adherence](#) reports, and from the left **Search** pane on your **Schedule** and **PTO** tabs. Categories in the **Search Criteria** section that offer drop-down menus allow you to choose multiple criteria. To see a list of all employees, do not select any criteria before clicking **Search**. Wildcard or partial searches are not supported.

You can build and save custom search filters so you don't need to enter criteria every time you want to conduct a search. These filters are available in the **Saved Search Criteria** section. Filters saved in one page are available in others that allow saved filters, and a default filter set on the **Employees** tab will also be the default filter on the **Overview** and Adherence reports. The current default filter has an X in its row under the **Default** column and loads automatically when the page opens.

You can save filters with either private or public access. Private filters may only be viewed, edited, and deleted by the user who created them. Public filters may be viewed by all users with permissions to search for employees or view the relevant reports, but can only be edited or deleted by the user who created them.

To remove default or current filter settings from your search, click **Clear**. To apply a filter from the list, click **Apply**. To remove a filter from the system, click **Delete**.

The **Search** pane on the **Schedule** and **PTO** tabs offers some additional "shortcut" functionality. If you click **Search** at the top of the pane, you will launch the **Search** window discussed above. However, you can directly view another employee's schedule, pending requests, or leave history by selecting an employee from the Search pane list. You can filter for **Active** (default), **Inactive**, or **All** employees by using the drop-down menu at the top of the list.

Create a Search Filter

To save a filter of custom search criteria:

1. Navigate to the desired tab and/or report, and click **Search** if applicable.
2. Select the necessary criteria.
3. Click **Save Search Criteria**.
4. Enter a name for the filter.
5. Select **Public** or **Private** from the **Access** drop-down list.
6. Check **Save as my default** if you want this to be your default filter.
7. Click **Save** to save the filter over the currently applied filter. Click **Save As New** to save this as a new filter.

Edit Employee Information

To edit an employee's profile information, such as labor unit membership, address, etc.:

1. Click the **Employee** tab and then click **Search**.
2. Enter one or more criteria that identify the employee profile(s) and click the smaller **Search** button.
3. Locate the user in the **Search Results** list and click **Edit**.
4. Edit the values as needed and click **Save**. Press the Control key and click to select or de-select one or more items in fields such as Team or Skills. Talk to your Clarity administrator or see the "About Employee Accounts" section of the *Uptivity Clarity Administration Manual* for definitions of the fields.

View Employee Schedules

For additional schedule information, see [View Schedules](#).

To view an employee's schedule:

1. Click the **Employee** tab and then click **Search**.
2. Enter one or more criteria that identify the employee profile(s) and click the smaller **Search** button.
3. Locate the user in the **Search Results** list and click **Schedule**.

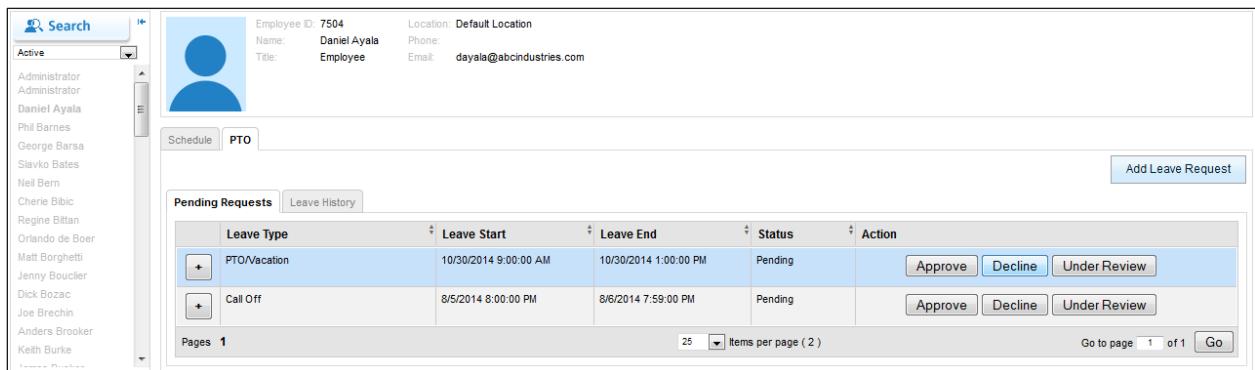
Edit Employee Schedules

You can use the Edit tab to change an employee's schedule after it has been published. If the employee has any leave requests (other than those that have been declined or cancelled), you can see them on the Edit tab and take them into account while making changes.

To edit an employee's schedule:

1. Navigate to the employee's schedule as shown in [View Employee Schedules](#).
2. Switch to the **Edit** tab and locate the day to be edited.
3. Add a schedule block, or click an existing schedule block and edit as necessary: drag it to another time or day, shrink it, or add an activity. Then click **Save**.

View Employee Leave Requests and History



The screenshot displays the Clarity WFM interface for an employee named Daniel Ayala. The interface includes a search bar, a list of employees on the left, and a main area showing the employee's profile and pending leave requests. The profile information includes Employee ID 7504, Name Daniel Ayala, Title Employee, Location Default Location, Phone, and Email dayala@abcindustries.com. The pending requests table is as follows:

| Leave Type | Leave Start | Leave End | Status | Action |
|--------------|-----------------------|-----------------------|---------|------------------------------|
| PTO/Vacation | 10/30/2014 9:00:00 AM | 10/30/2014 1:00:00 PM | Pending | Approve Decline Under Review |
| Call Off | 8/5/2014 8:00:00 PM | 8/6/2014 7:59:00 PM | Pending | Approve Decline Under Review |

With appropriate permissions, you can search for and see pending requests and leave history as recorded in Clarity for employees in your Team(s) or for all employees.

The **Pending Requests** tab shows the current status of any leave requests with a status of Pending or Under Review. You can sort pending requests by clicking in any of the column headers. You can also view (but not edit) any comments associated with a request by clicking the plus sign for that request.

To view an employee's pending leave requests:

- Navigate to the employee's schedule as shown in [View Employee Schedules](#) and click the **PTO** tab, then click the **Pending Requests** tab.

The **Leave History** tab shows all leave requests processed in Clarity that have been approved, declined or cancelled, beginning with the most recent. You can sort the display by clicking in any of the column headers, and you can filter by type of leave, status of request, and start date of request. You can also view (but not edit) any comments associated with a request by clicking the plus sign for that request.

To view an employee's leave request history:

- Navigate to the employee's schedule as shown in [View Employee Schedules](#) and click the **PTO** tab, then click the **Leave History** tab.

Manage Employee Shift Swap Requests

With appropriate permissions, you can approve or decline shift swap requests from members of your Team, or from all employees. Clarity only allows shift swap requests between agents who have exactly the same Skills, whether those Skills are assigned directly to the agent or inherited from their Labor Unit. For more information on shift swap workflow, see [Request Shift Swap](#).

To approve or decline employee shift swap requests:

1. Click the **Reports** tab and then click **Processes**.
2. For **Status**, select **Pending** from the drop-down list.
3. Click **Search** and scroll to the bottom of the screen to see pending shift swap requests.
4. Click **Approve** or **Decline** for the desired request.

Manage Employee Leave Requests

Each organization approaches leave management differently. In some, supervisors submit leave and shift swap requests on behalf of their employees. Most organizations allow employees to submit leave requests themselves, although some require supervisors to submit call offs (when an employee does not report for work or notifies a supervisor that they will not report). The procedure is the same whether you are entering leave on behalf of yourself or someone else; see [Request Leave](#) for more information.

Supervisors may also have to approve employee requests for leave or shift swaps, depending on how the leave request type has been configured.

If employees have email addresses entered on their accounts, they will receive emails when leave requests are made for them, or when the status of a request changes. Supervisors receive email notifications when employees make requests, even if the request does not have to be approved.

Supervisors can see the number of unapproved requests (i.e., no action has been taken) in the **Home** tab's **Dashboard** widget. Supervisors can change a request's status multiple times. Employees receive an email each time the request's status changes. The email includes any comments from the Supervisor.

Respond to Individual Employee Leave Requests

Employee ID: 7504 Location: Default Location
 Name: Daniel Ayala Phone:
 Title: Employee Email: dayala@abcindustries.com

Schedule PTO Add Leave Request

Pending Requests Leave History

| Leave Type | Leave Start | Leave End | Status | Action |
|------------|----------------------|----------------------|---------|------------------------------|
| FMLA | 11/5/2014 8:00:00 AM | 11/5/2014 4:00:00 PM | Pending | Approve Decline Under Review |
| Call Off | 8/5/2014 8:00:00 PM | 8/6/2014 7:59:00 PM | Pending | Approve Decline Under Review |

Pages 1 25 Items per page (2) Go to page: 1 of 1 Go

To respond to an individual employee's leave request from their PTO tab:

1. Navigate to the employee's pending requests as shown in [View Employee Leave Requests and History](#).
2. On the **Pending Requests** tab, click **Approve** or **Decline** in the **Action** column for the desired request. If you want the employee to know you have seen the request, but do not want to make a final decision, click **Under Review**.
3. Enter **Comments** if desired, and click **Submit**.

You can also approve leave requests from an employee's Schedule tab. However, you cannot decline the request or mark the request as under review, nor can you provide comments, when using this method.

To approve an individual employee's leave request from their Schedule tab:

1. Navigate to the employee's schedule as shown in [View Employee Schedules](#).
2. On the **Monthly**, **Weekly**, or **Daily** tab, right-click a pending leave request.
3. Click **Approve**.

When you approve or decline a request, Clarity moves it from the Pending tab to the Leave History tab. If you need to change the status again, you must do so from the Processes report (see [Respond to Multiple Employee Requests](#)).

Respond to Multiple Employee Requests

The Processes page allows you to review multiple requests at once. The page initially shows only Pending requests, but you can use the search criteria fields to search for a specific request or to filter the list for a specific Location, Team, Status, or Date Range. This search does not support multiple criteria within a category. You can also use the sort triangles at the top of each column to sort the display by the contents of that column.

The current status of each request is grayed-out in the display, as shown here. You can **Approve** or **Decline** a request, or note that it is **Under Review**. The **Under Review** status is used to indicate that the request has been seen but no decision has been made. If you need to reconsider a request that was previously approved or declined, you should also use the **Under Review** status until a final decision is made.

Request Search

First name: Teams:

Last name: Status:

Title:

Location:

Start Date Range: -

End Date Range: -

Leave Requests

| Name | Request Type | Location | Title | Teams | Status | Leave Start | Leave End | |
|--------------|--------------|--------------|------------|------------|----------|-----------------------|-----------------------|--|
| Gina Smith | PTO | Columbus, OH | Supervisor | New Team 2 | Approved | 2/24/2012 12:15:00 AM | 2/24/2012 5:00:00 PM | <input type="button" value="Approve"/> <input type="button" value="Decline"/> <input type="button" value="Pend"/> <input type="button" value="Under Review"/> |
| Joe Walters | PTO | Columbus, OH | Supervisor | New Team 2 | Approved | 2/23/2012 7:00:00 AM | 2/23/2012 4:00:00 PM | <input type="button" value="Approve"/> <input type="button" value="Decline"/> <input type="button" value="Pend"/> <input type="button" value="Under Review"/> |
| Takako Myers | Call Off | Columbus, OH | Supervisor | New Team 2 | Approved | 3/12/2012 9:00:00 PM | 3/13/2012 2:00:00 AM | <input type="button" value="Approve"/> <input type="button" value="Decline"/> <input type="button" value="Pend"/> <input type="button" value="Under Review"/> |
| Iris Murphy | Call Off | Columbus, OH | Supervisor | New Team 2 | Approved | 3/21/2012 9:00:00 PM | 3/21/2012 11:45:00 PM | <input type="button" value="Approve"/> <input type="button" value="Decline"/> <input type="button" value="Pend"/> <input type="button" value="Under Review"/> |

To view and respond to multiple pending leave requests:

1. Click the **Reports** tab and then click **Processes**.
2. Review each request and click the appropriate status option if you wish to change the status.
3. In the **Comments** field, enter any desired comments.

Report on Employee and Call Activity

The Reports tab provides access to information that supervisors need to monitor employees as well as manage staffing and service within your organization.

Real-Time Roster

| Name | Ext. | Labor Unit | Skill | Scheduled | Actual | Late | Duration | Action |
|----------------------------|----------------|--------------------|--|------------------|------------------|------|-----------------|--------|
| VAZQUEZ, FRANKLIN | 3010163 | Corax - HSI | 500, 505, 510, 515, 520, 525, ... | Off Shift | Off Shift | -- | 11:51:12 | |
| <i>RIVERA, FELIX</i> | <i>3010029</i> | <i>Corax - HSI</i> | <i>500, 505, 510, 515, 520, 525, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>00:02:52</i> | |
| HULL, ANGELICA | 3020006 | Corax - HSI | 500, 505, 507, 510, 512, 515, ... | Off Shift | Off Shift | -- | 13:52:51 | |
| <i>AGENT, CALLCOPY</i> | <i>3010034</i> | <i>Corax - HSI</i> | <i>500, 505, 506, 507, 508, 510, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>00:01:23</i> | |
| <i>ZAMORA, MABLE</i> | <i>3010001</i> | <i>Corax - HSI</i> | <i>500, 505, 506, 508, 510, 511, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>01:37:01</i> | |
| <i>RUTLEDGE, COREY</i> | <i>3010091</i> | <i>Corax - HSI</i> | <i>500, 505, 507, 510, 512, 515, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>00:02:44</i> | |
| <i>WELCH, TERRENCE</i> | <i>3010030</i> | <i>Corax - HSI</i> | <i>500, 505, 506, 507, 508, 510, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>00:01:34</i> | |
| <i>Rankin, Cheryl</i> | <i>3010093</i> | <i>Corax - HSI</i> | <i>500, 505, 510, 515, 520, 525, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>00:00:30</i> | |
| <i>CONTRERAS, KRISTINE</i> | <i>3010036</i> | <i>Corax - HSI</i> | <i>500, 505, 510, 515, 520, 525, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>00:00:36</i> | |
| STRONG, CLINTON | 3010140 | Corax - HSI | 500, 505, 507, 510, 512, 515, ... | Off Shift | Off Shift | -- | 21:29:35 | |
| <i>PRESTON, MALINDA</i> | <i>3010003</i> | <i>Corax - HSI</i> | <i>500, 505, 507, 510, 512, 515, ...</i> | <i>Off Shift</i> | <i>Lunch</i> | -- | <i>00:04:44</i> | |
| <i>WARNER, JEAN</i> | <i>3010170</i> | <i>Corax - HSI</i> | <i>500, 505, 510, 515, 520, 525, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>00:14:22</i> | |
| <i>ELLISON, LESLEY</i> | <i>3010108</i> | <i>Corax - HSI</i> | <i>500, 505, 506, 507, 508, 510, ...</i> | <i>Off Shift</i> | <i>Available</i> | -- | <i>00:12:27</i> | |
| FISCHER, LOLA | 3010028 | Corax - HSI | 500, 501, 502 | Off Shift | Off Shift | -- | 11:05:35 | |
| HENRY, JEANNETTE | 3020009 | Corax - HSI | 500, 501, 502, 507 | Off Shift | Off Shift | -- | 14:45:44 | |

The Real-Time Roster provides current status information for employees in Clarity. This information can be used to locate employees, determine which ones can be sent to break, or assess if employees need to be called in to handle increasing call volumes. The information is updated every 15 seconds. Information on the roster is a point-in-time calculation, and is not retained. Your account configuration may allow you to see all employees or only members of your Team(s).

You can sort items in the roster by clicking the arrow in some column headers. Click the up arrow to sort items from A-to-Z or High-to-Low. Click the down arrow for the opposite order.

In addition to the criteria available for filtering (see below), the Real-Time Roster shows this information:

- **Employee name:** Names appear in red if the employees' scheduled state differs from their actual state. For example, an employee who is late going to lunch may show a Scheduled Status of Lunch and an Actual Status of On Call. Likewise, an employee who has called off on a scheduled work day could show a Scheduled Status of On Shift and an Actual Status of Off Shift.
- **Extension:** Telephone extension used by the employee.

- **Late:** How long the Scheduled/Actual states have conflicted. Late is relevant to the closest schedule state change and the Late Threshold value set on the Shift Activity Type. For example, if the threshold is 300 seconds (five minutes) and the employee has not logged into the phone at four minutes after an activity was scheduled to start, the roster will not show her as late. Users that are late for an activity appear in red italics.
- **Duration:** Indicates the total time in a current actual state.

Filter Roster Information

The Real-Time Roster can be filtered by a number of criteria to make your view more meaningful. If no criteria are selected, all employees can be retrieved, depending on user permissions. Multiple criteria in a category may be selected by pressing the Shift or Control keys while clicking selections. The following criteria are available for filtering (for related information, see [Clarity Terminology](#)):


- **Labor Unit**
- **Skill**
- **Scheduled:** Shows the Shift Activity Type scheduled for the agent at the current time.
- **Actual:** Shows the status (Roster Type) of the agent at the current time, usually based on information sent by your PBX/ACD.
- **Removed Agents:** Lists agents that have been manually removed from the roster and allows you to return them to the roster.

Perform Real-Time Roster Actions


To view the roster:

1. Click the **Reports** tab and then click **Real Time**.
2. In the Roster area, click **Filter**.
3. In the **Roster Filter**, select the search criteria and click **Filter**.

To view an agent's profile from the roster:

1. Click the **Reports** tab and then click **Real Time**.
2. Click the  icon for the employee whose profile you wish to view. The profile will open in a new browser tab.

To remove an agent from the roster list:

1. Click the **Reports** tab and then click **Real Time**.
2. Click the  icon for the employee you wish to remove.



To add a removed employee back to the roster:

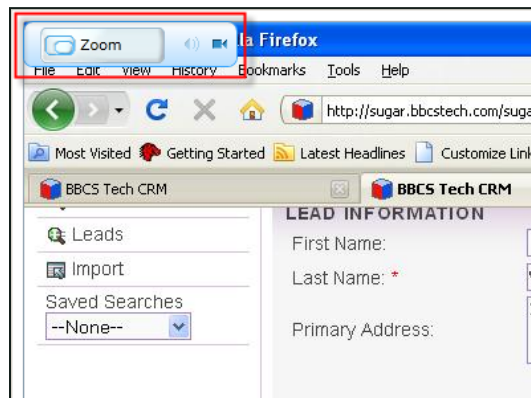
1. Click the **Reports** tab and then click **Real Time**.
2. In the Roster area, click **Filter**.
3. Locate the employee in the Removed Agents list.
4. Click **Cancel**.
5. Click **Filter**. The roster refreshes, and the user appears on the list.

Live Monitoring

Note: The Live Monitoring feature requires that Uptivity Discover Call Recording be installed and configured along with Clarity. It also requires licensing for the Uptivity Discover Screen Recording feature. This functionality is not available in a standalone installation of Clarity.

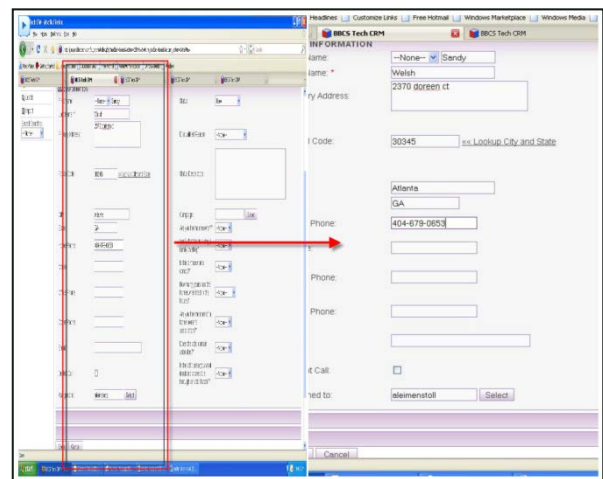
To access live feeds of an agent's audio and/or desktop in near-real-time:

1. From the Real-Time Roster screen, scroll to the agent to be monitored, and click the Play button  in the Action column.
2. Hover the mouse cursor over the tab  in the upper left of the playback area to display the zoom menu. Speaker and camera icons indicate the presence or absence of audio and screen feeds. In the example, only video is available.

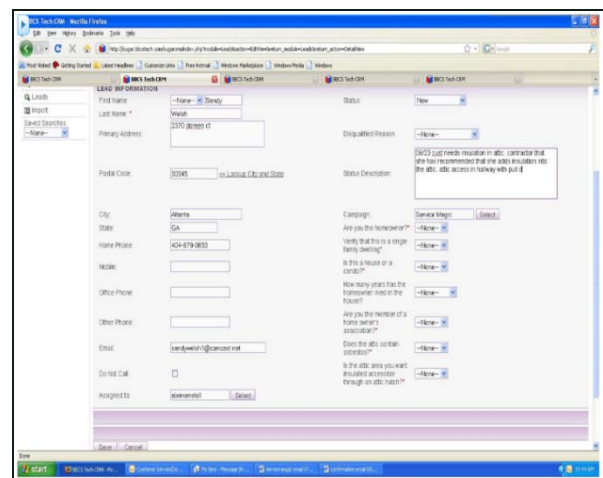


3. Click **Zoom** to toggle through three different zoom levels:

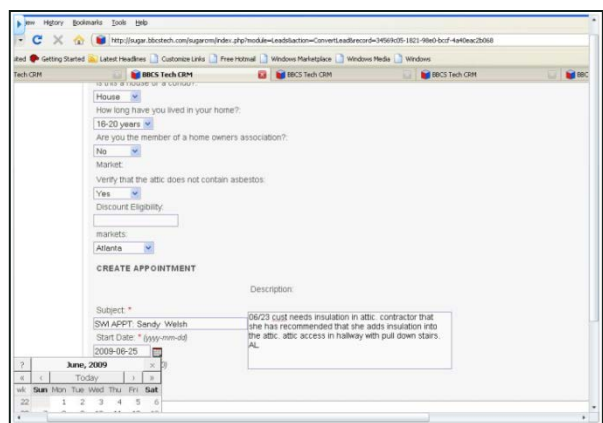
- **Split** shows a compressed view of the entire screen on one side with a movable zoom marker to indicate the portion of the screen to show zoomed 100% on the other side.



- **Stretch-to-Fit** resizes the full screen image to fit the window. It allows viewing the entire screen but may be difficult to read due to the compression.



- **Actual Size** displays the live feed at 100% of what the agent sees. Scrollbars appear at the side and bottom of the playback to allow scrolling to different parts of the screen.



4. Close the playback window to stop playing the live stream. Live monitoring will run continuously until the observer stops playback.

Schedule Overview

The **Overview** button on the **Reports** tab offers Supervisors high-level daily and weekly views of employee schedules. With appropriate permissions, you can make schedule adjustments that affect multiple employees. If you need to perform one of these tasks and are unable to do so, see your Clarity administrator. This tab also provides various reports that offer daily and weekly views of staffing information.

| Last Name | First Name | Sun Feb 16 | Mon Feb 17 | Tue Feb 18 | Wed Feb 19 | Thu Feb 20 | Fri Feb 21 | Sat Feb 22 |
|-----------|------------|------------|------------|------------|------------|------------|------------|------------|
| CONTRERAS | KRISTINE | | | | Shift | Shift | Shift | Shift |
| Doe | Jane | | | | Shift | Shift | Shift | |
| Doe | John | | | | Shift | Shift | Shift | |
| Falk | Ken | | | | Shift | Shift | Shift | Shift |
| GIBBS | REGINALD | | | | Shift | Shift | Shift | Shift |
| JUAREZ | ERIK | | | | Shift | Shift | Shift | Shift |
| KEMP | MARI | | | | Shift | Shift | Shift | Shift |

To view employee schedules in the Overview report:

1. Click the **Reports** tab and then click **Overview**.
2. Select from **Saved Search Criteria** or enter new search criteria if desired to customize the schedule view. For information on saving search criteria, see [Create a Search Filter](#).
3. Click the arrows at the top of the schedule to move forward or backward in time, or click the **View Date** field to move to a specific day or week.
4. Click the **Daily** or **Weekly** tab to toggle back and forth between schedule views.

Edit Shift

| From | To | Shift |
|----------------|----------------|-------|
| 10/05/12 10:00 | 10/05/12 18:30 | Shift |
| 10/05/12 13:30 | 10/05/12 13:45 | Break |
| 10/05/12 15:45 | 10/05/12 16:00 | Break |
| 10/05/12 17:15 | 10/05/12 18:15 | Lunch |

On both the **Daily** and **Weekly** report tabs, with appropriate permissions, you can:

- Remove a shift activity, or the entire shift, by clicking **X**.
- Add a shift activity by clicking **+ Add Activity** and configuring the time and activity type.
- Add an entire shift by clicking **Add Shift**.

- Enter a **Leave Request** for an employee by clicking **Add Leave Request**. For more information, see [Request Leave](#).
- Change the status of an existing leave request.

To edit a shift:

- Click an existing shift, select **Edit Shift**, make the desired revisions to the shift and click **Save**.

Mass Event Add

To add a specific event to multiple employees at once:

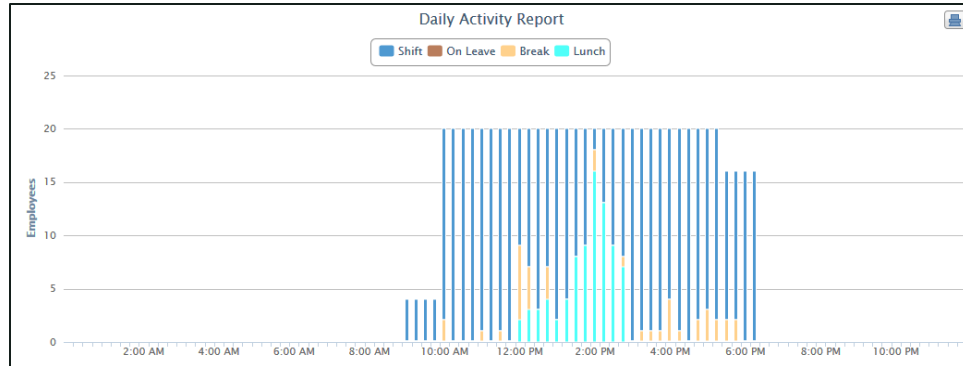
1. Click one or more names in the **Unassigned** column and use the arrow keys to move the selected agents to the **Assigned** column.
2. Use the pop-up calendar and slider bars to enter event starting and ending times in the **From** and **To** fields.
3. Select the type of event from the drop-down list and click **Save**.

Mass Shift Add

To add a specific shift schedule to multiple employees at once:

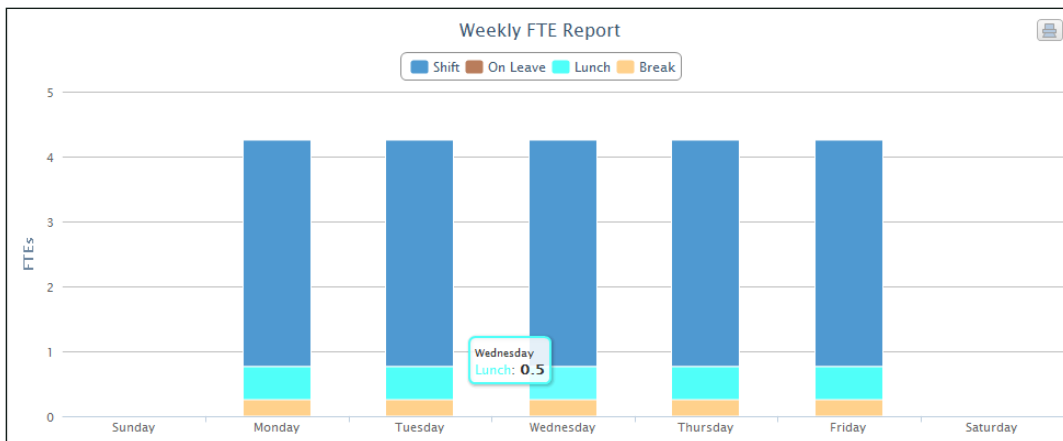
1. Click one or more names in the **Unassigned** column and use the arrow keys to move the selected agents to the **Assigned** column.
2. Use the drop-down list to choose whether to **Create shift from template** or **Create shift manually**.
3. If you are using a template, select the template from the drop-down list and use the pop-up calendar and slider bars to set the shift start time in the **From** box. If you are creating the shift manually, use the pop-up calendar and slider bars to set the shift start time in the **From** box and the shift end time in the **To** box. Add activities to the shift by clicking **+ Add Activity**.
4. Click **Save**.

Daily Reports



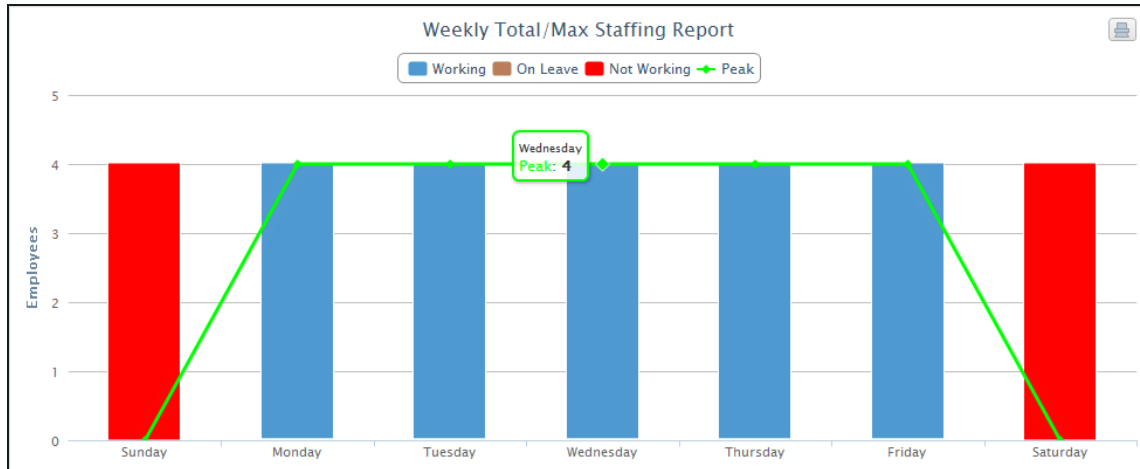
On the **Daily** tab, following the **Schedule Overview**, the **Daily Activity Report** provides a visual representation of coverage throughout the specified day. To print this report, click **Print** in the upper right corner.

Weekly Reports



On the **Weekly** tab, following the **Schedule Overview**, the **Weekly FTE Report** displays labor distribution each day for employees available for scheduling. This helps Supervisors balance resource allocation between standard shift activities and other tasks, like meetings, training, or breaks, while avoiding under- or overstaffing situations. To print this report, click **Print** in the upper right corner.

Note: If an employee has requested leave during a week, and the request was made when the employee did not have a shift scheduled, that employee will not be reflected as "on leave" in this report since he/she was not available for the week.



The **Weekly Total/Max Staffing Report** shows a breakdown of what employee staffing looks like for a given week. In this example, since one person is not working all week, the Peak line indicates that of the four employees available, three at most will be working. To print this report, click **Print** in the upper right corner.

Note: If an employee requested leave during the week, and the request was made when the employee did not have a shift scheduled, that employee will not be reflected in these reports since they were not available for the week.

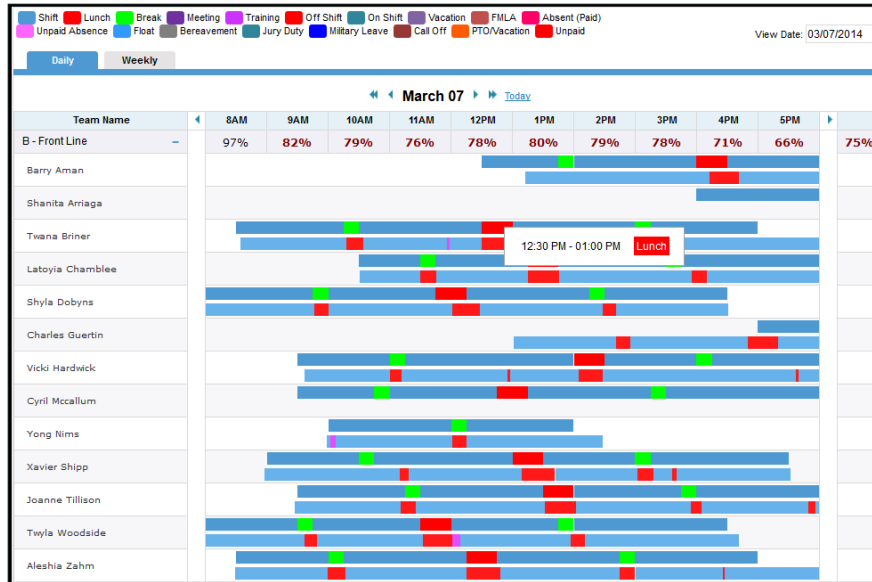
Schedule Adherence

The **Adherence** button on the **Reports** tab lets you monitor how well agents are adhering to their scheduled hours and activities. The display is based on information from the PBX/ACD and/or agent's phone. Information can be shown by individual agent, group, or location. The display changes from black to red when adherence drops below 85%. Data can be viewed at the Daily or Weekly level, with tabs available to easily toggle between views.

Schedule Adherence is updated whenever the page is loaded or refreshed, with calculations current as of the last full hour. For example, at 10:59 A.M., adherence data would be current as of 10 A.M. At 11:01 A.M., adherence data would be current as of 11 A.M. The report appears once all relevant data has been retrieved.

If adherence data in the database is absent or incomplete, or the data processing service is not running, adherence may report lower numbers than expected, or indicate that adherence is at 0%. Clarity does not know whether the lack of data is due to a system issue or due to an agent being out of adherence and not being there for real-time data to record.

Daily Adherence



On the **Daily** tab, the display graphically shows coverage throughout the specified day and how accurately actual hours align compared to those originally scheduled. You can expand groupings by clicking the **+** icon to show actual activity charts for scheduled employees and events compared to what was scheduled.

To move forward or backward in time:

- Click the arrows at the top of the schedule.

To move to a specific day or week:


- Click the **View Date** field, or click **Today** for current information.

To display more details:

- Hover the mouse cursor over an element in the chart.

Weekly Adherence

| | | View Date: 03/07/2014 | | | | | | |
|------------------|-----------|-------------------------------|-----------|-----------|-----------|-----------|-----------|-------|
| | | Daily Weekly | | | | | | |
| | | ◀ Mar 2 – Mar 8, 2014 ▶ Today | | | | | | |
| Team Name | Sun Mar 2 | Mon Mar 3 | Tue Mar 4 | Wed Mar 5 | Thu Mar 6 | Fri Mar 7 | Sat Mar 8 | Total |
| B - FrontLine | --- | 72% | 80% | 75% | 77% | 75% | --- | 76% |
| Barry Aman | --- | 79% | 88% | 88% | 86% | 78% | --- | 84% |
| Shanita Arriaga | --- | 0% | 0% | 0% | 0% | 0% | --- | 0% |
| Twana Briner | --- | 84% | 80% | 90% | 90% | 90% | --- | 87% |
| Latoyia Chamblee | --- | 87% | 93% | 90% | 70% | 90% | --- | 86% |
| Shyla Dobyns | --- | 89% | 77% | 90% | 90% | 86% | --- | 84% |
| Charles Guertin | --- | 87% | 92% | 83% | 87% | 73% | --- | 84% |
| Vicki Hardwick | --- | 88% | 86% | 0% | 92% | 90% | --- | 71% |
| Cyril McCallum | --- | 87% | 92% | 93% | 47% | 0% | --- | 64% |
| Yong Nims | --- | 87% | 91% | 92% | 88% | 91% | --- | 90% |
| Xavier Shipp | --- | 90% | 86% | 88% | 87% | 87% | --- | 87% |
| Joanne Tillison | --- | 93% | 90% | 90% | 89% | 90% | --- | 90% |
| Twyla Woodside | --- | 0% | 85% | 80% | 91% | 89% | --- | 69% |
| Aleshia Zahm | --- | 88% | 91% | 92% | 92% | 92% | --- | 91% |

The **Weekly** tab shows schedule adherence over a seven-day period. You can expand groupings by clicking the  icon to show more specific detail broken down by day.

To move forward or backward in time:

- Click the arrows at the top of the schedule.

To move to a specific day or week:

- Click the **View Date** field, or click **Today** for current information.

To display more details:

- Hover the mouse cursor over an element in the chart.

Report Widgets

Both the **Real Time** and **Historical** buttons on the **Reports** tab offer a selection of report widgets to display specific information. Each widget organizes data by Labor Unit on tabs across the top of the widget.

To scroll through the available Labor Unit tabs:

- Click a widget's up/down arrows ().

To see a drop-down list of all the Labor Unit tabs:

- Click a widget's blue-dot arrow ().

Add or Remove a Report Widget

To add or re-add a widget:

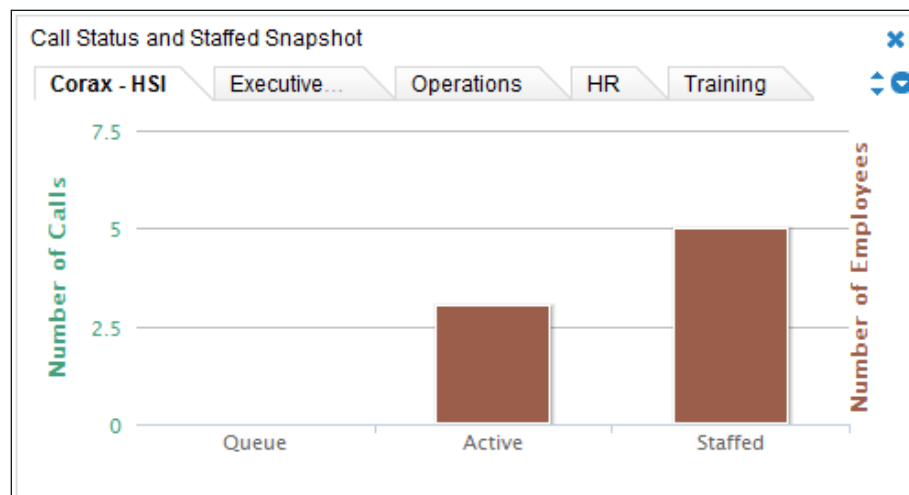
1. Click the **Reports** tab, then either the **Real Time** or **Historical** tab depending on the widget to be added.
2. Click the **Add Widget** link.
3. Select a report widget from the drop-down list. The widgets available will vary depending on whether you clicked **Real Time** or **Historical**.
4. Select a Labor Unit to appear as the top tab of the widget. All Labor Units appear in the widget as separate tabs.
5. Click **Add**. The widget appears on the tab.

To remove a widget:

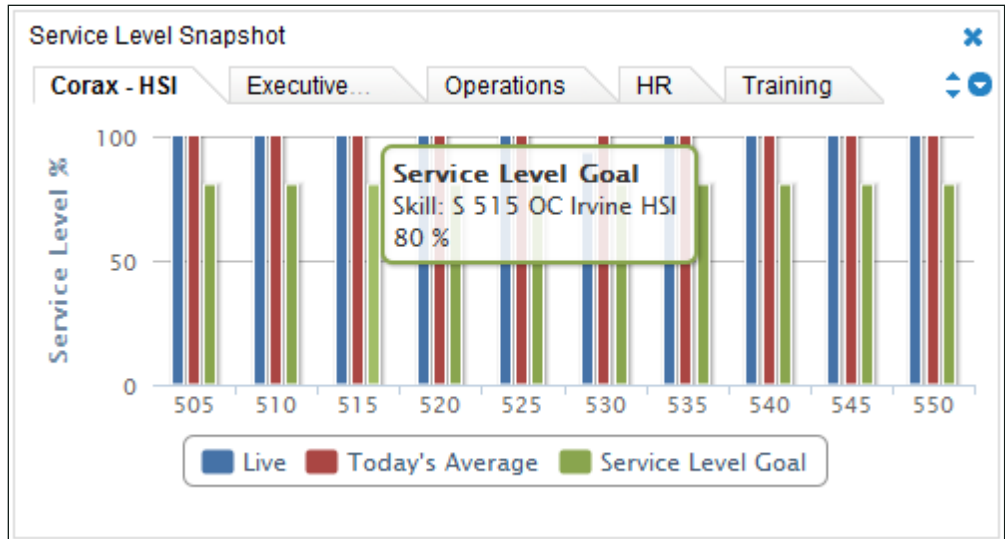
- Click the **X** icon in the top right corner of that widget.

Real-Time Widgets

Each real-time widget uses a default time period that cannot be changed. Data in the widgets refresh every 15 seconds. Real-time data for call activity comes from the PBX/ACD. Placing the cursor over a column or line provides specific numbers for that column or line. Some widgets use two x-axis units of measure, as indicated by labels on the left and right sides of the widgets.

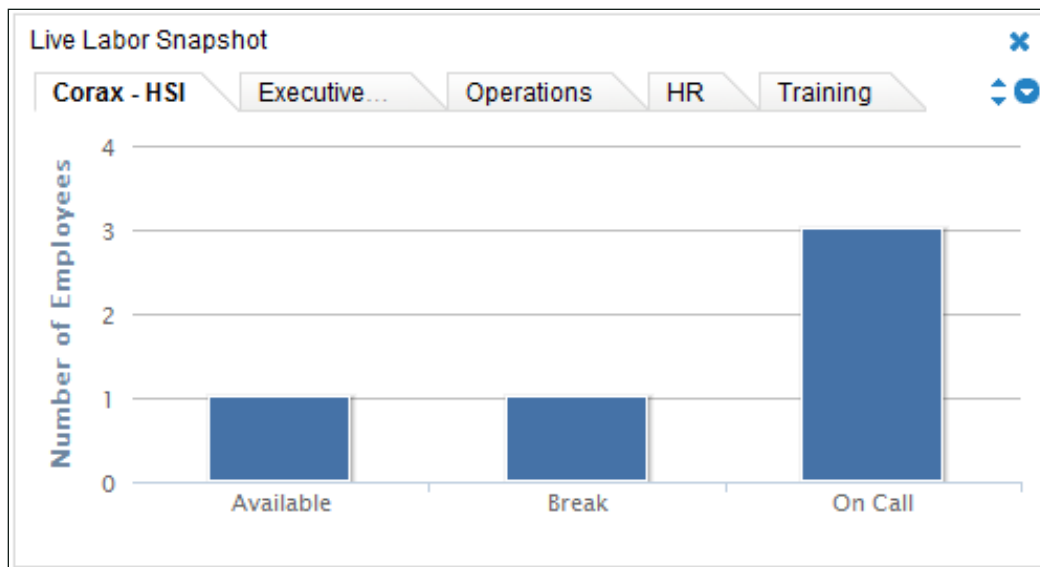


- **Call Status and Staffed Snapshot:** Displays the number of Active and In-Queue calls for a period of time. Staffed indicates the number of employees on duty.

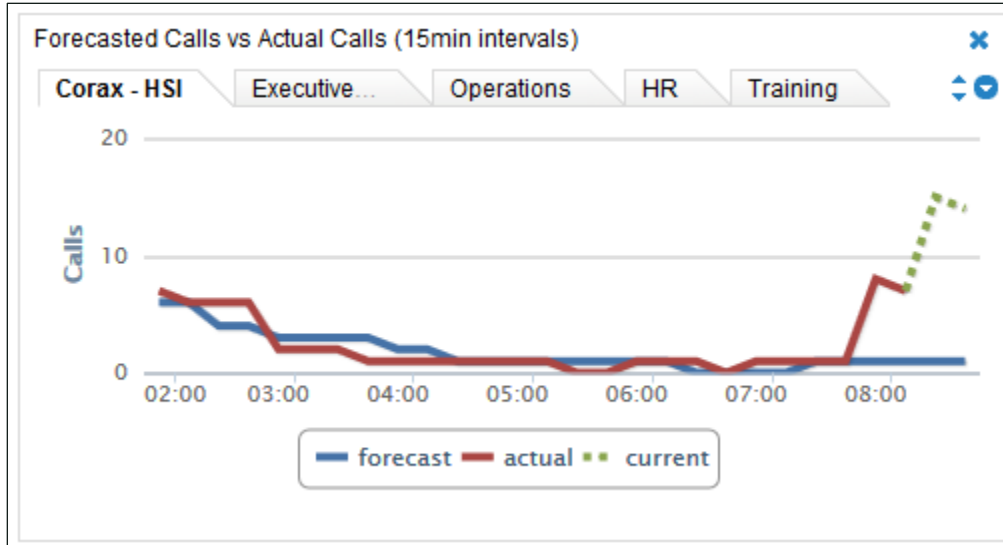


- **Service Level Snapshot:** Displays how successful each Labor Unit is in meeting Service Level goals. Service Level numbers are tied to Skills and configured by your Clarity administrator. The calculation is based on the total number of calls and the percent of those calls that were answered in a specific amount of time. Each Skill for a Labor Unit appears on that Labor Unit's tab.

Note: The Service Level Snapshot widget may require a page refresh to display the latest information.



- **Live Labor Snapshot:** Displays the actual agent status based on their PBX login status and schedule.

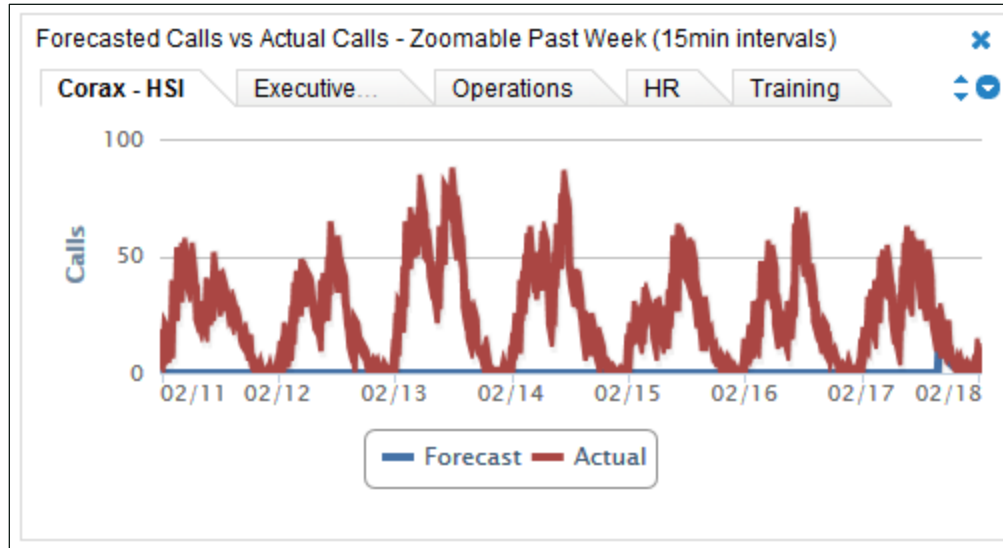


- Forecasted Calls vs. Actual Calls (15 Minute Intervals):** Display compares the number of calls forecast to the actual number of calls handled over the previous six hours, based on the forecast that is designated to be used for reporting for that Labor Unit. For related information, see [Designate a Forecast to Use for Reporting](#).

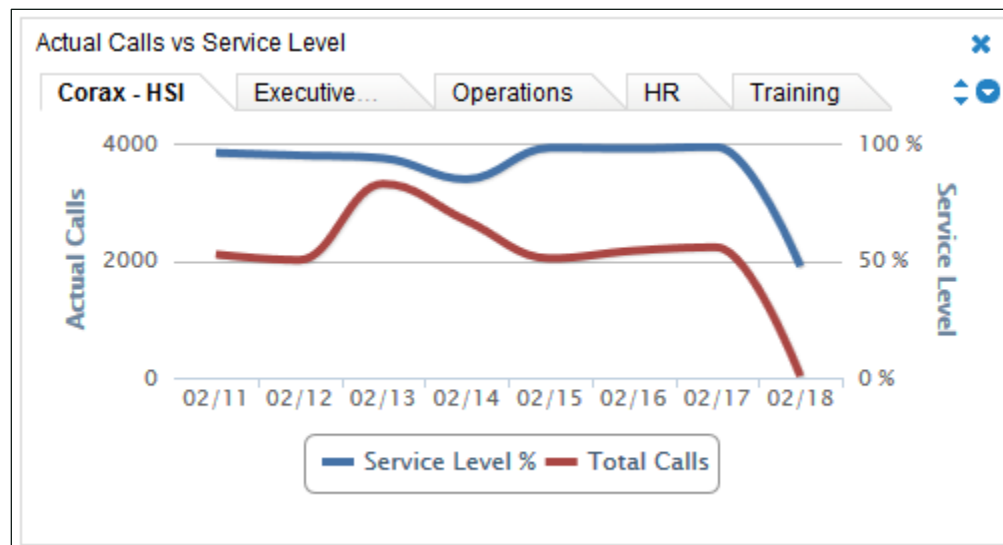


- Live Project Snapshot:** Display offers a numerical view instead of a graphical view for those who prefer to see actual numbers. Under **Service Level**, **Live** is real-time data as reported to Clarity by the ACD for the most recent interval. **Today** is calculated by Clarity as Number of calls answered within the acceptable wait time for the skill / Total number of calls answered.

Historical Widgets



- **Forecasted Calls vs. Actual Calls:** Displays compares the number of calls forecast to the actual number of calls handled over the past week, based on the forecast that is designated to be used for reporting for that Labor Unit. Placing the cursor over a part of either line shows the specific numbers for a 15 minute interval. For related information, see [Designate a Forecast to Use for Reporting](#).



- **Actual Calls vs. Service Level:** Displays the number of actual calls and the percentage of those calls meeting the predefined service level over the previous week. Comparing this information to the forecasted calls can help explain service level issues.

Ad Hoc Reports

The ad hoc reports feature lets you create custom, reusable reports. You control the data included in a report and how that data appears. You must have permissions to create and edit ad hoc reports. If you need to work with ad hoc reports and are unable to do so, see your Clarity administrator. Benefits of this feature include:

- Insight into previously unknown trends and relationships between processes, resources, and other data sources via data analysis.
- More useful reports customized to your data and information requirements.
- Flexibility to revise reports as data and needs change.

Ad Hoc Report Considerations

By default, the number of data rows returned by any ad hoc report is limited to 30,000. This can be changed by your Uptivity installation team, or after installation by Uptivity Support. Clarity displays a warning when results exceed this limit. There is also a 30-second time-out in the Report Builder. These safeguards prevent you from generating reports that request large data sets and thus could bog down the system. If retrieved information is incomplete, redefine the search criteria or try redesigning the report. There is no time-out associated with report rendering.

About the Ad Hoc Report Builder

The screenshot shows the 'Report Builder' window with the following sections:

- Report Name:** A text input field.
- Layout:** A dropdown menu set to 'Summary Table'.
- Reporting Format:** A dropdown menu set to 'RDL'.
- Description:** A text input field.
- Fields:** A list of available fields for criteria and report, including 'ACD Split Call Data', 'ACD Agent/Split Call Data', 'Agent', 'Agent Name', 'Split', 'Call Volume Date/Time', 'Interval Seconds', 'Answered Calls', 'Hold Calls', 'Ring Calls', 'Customer Seconds', 'Hold Seconds', and 'ACW Seconds'.
- Criteria:** A table with columns: Table, Field, Operator, Value, On Report, and Action. The table is currently empty with the instruction 'Drag and drop fields here to create criteria'.
- Chart Type:** A section with three icons (bar chart, pie chart, line chart) and two options: 'Summary' and 'Columns'.
- Report Structure:** A section with two areas: 'Drag and drop fields here to create columns' and 'Drag and drop fields here to create rows'.

The **Report Builder** is the core of ad hoc reporting, allowing you to specify a report's name, layout, format and description. The **Report Builder** is divided into four primary areas: **Fields**, **Criteria**, **Chart Type** and **Report Structure**. These areas look different depending on the report category and report layout you select.

About Ad Hoc Report Fields and Criteria

You can create ad hoc reports in three main categories: **ACD Call and Agent Data**, **Agent Leave/PTO**, and **Shift**. Each category offers different field and criteria options.

Fields and **Criteria** in ad hoc reports are related, since the fields you use in a report are also used to establish criteria for the report. In the **Fields** area, you will see all the database fields available for the selected report type. These fields can be dragged and dropped into the **Criteria** and **Report Structure** areas as needed.

The **Criteria** area allows you to filter information displayed in the report. A drop-down menu of relevant operators and a text entry field for the operator value (or a date selector) will appear for each data field. Operators and acceptable values vary depending on the field selected. Operators may include:

- Less than
- Greater than
- Equal to
- Not equal to
- Less than or equal to
- Greater than or equal to
- Starts with
- Ends with
- Contains
- Does not contain
- In
- Not in

The **On Report** check box allows you to choose whether a criterion is shown in the **Report Criteria** section of the rendered/printed report.

Note: The Clarity database stores dates and times in UTC (Coordinated Universal Time), the primary time standard by which the world regulates clocks and time. The Clarity Web Portal often adjusts these fields to the user's time, but ad hoc reports show the date/time fields in UTC. Thus, you may notice differences between ad hoc reports and what you see in Clarity's user interface.

Reference: Available Ad Hoc Reporting Fields

ACD Call and Agent Data

The following fields are available for ad hoc reporting on **ACD Call and Agent Data**. This data (especially **ACD Agent/Split** and **ACD Agent** data) can be used to calculate Average Handle Time (AHT), Occupancy/Utilization, and other metrics. Some fields may not contain data, depending on your PBX integration.

ACD Split Call Data

- **Call Volume Date/Time:** Click the calendar icon to enter search criteria using date selector.
- **Split:** Enter search criteria in the open-entry text box.
- **Device:** Enter search criteria in the open-entry text box.
- **Interval Seconds:** This is the time interval for which data should be pulled. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Offered Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Answered Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Service Level Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Abandoned Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Abandoned Seconds:** This is the total time in seconds that abandoned calls were on hold before caller hung up. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

ACD Agent/Split Call Data

- **Split:** Enter search criteria in the open-entry text box.
- **Call Volume Date/Time:** Click the calendar icon to enter search criteria using date selector.
- **Interval Seconds:** This is the time interval for which data should be pulled. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Answered Calls:** Enter search criteria in the open-entry text box; whole number values only.

- **Hold Calls:** This is the number of calls that were placed on hold one or more times. Enter search criteria in the open-entry text box; whole number values only.
- **Ring Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Customer Seconds:** This is the talk time in seconds. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Hold Seconds:** Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **ACW Seconds:** This is time spent on after-call work. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

ACD Agent Data

- **Call Volume Date/Time:** Click the calendar icon to enter search criteria using date selector.
- **Interval Seconds:** This is the time interval for which data should be pulled. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Logged in Seconds:** This is the total number of seconds logged into the ACD. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Available Seconds:** This is the total number of seconds available to take calls (e.g. waiting for a call). Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Inactive Seconds:** This is the total number of seconds in inactive modes (e.g. lunch, break, training). Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

Skill

- **Skill:** Enter search criteria in the open-entry text box.

Labor Unit

- **Labor Unit:** Enter search criteria in the open-entry text box.

User

- **Agent Name:** Enter search criteria in the open-entry text box.

Team

- **Team:** Enter search criteria in the open-entry text box.

- **Team Supervisor:** Enter search criteria in the open-entry text box.

Service Level

- **SL Waiting Time:** Enter search criteria in the open-entry text box; numeric values only.
- **SL Percent Calls Answered:** Enter search criteria in the open-entry text box; numeric values only.

Forecast Call Data

- **Forecast Volume Set Name:** Enter search criteria in the open-entry text box.
- **Offered Calls:** Enter search criteria in the open-entry text box; numeric values only.
- **Forecast vs. Actual %:** Enter search criteria in the open-entry text box; numeric values only.

Note: When considering forecast accuracy, your goal is to come as close to 100% as possible. Therefore, percentages that are significantly higher or significantly lower than 100 are not desirable (e.g. 150% is not a good result).

- **Split:** Enter search criteria (split or skill number) in the open-entry text box.
- **Forecasted Calls:** Enter search criteria in the open-entry text box; numeric values only.
- **Forecast Interval Seconds:** Enter search criteria in the open-entry text box; numeric values only.
- **Forecast Skill Name:** Enter search criteria in the open-entry text box.
- **Forecast Call Volume Date/Time:** Click the calendar icon to enter search criteria using date selector.

Agent Leave and PTO

The following fields are available for ad hoc reporting on **Agent Leave and PTO**.

Leave Requests

- **Leave Type:** Enter search criteria in the open-entry text box.
- **Date Created:** Click the calendar icon to enter search criteria using date selector.
- **Start Date:** Click the calendar icon to enter search criteria using date selector.
- **End Date:** Click the calendar icon to enter search criteria using date selector.

- **Leave Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Comment:** Enter search criteria in the open-entry text box.
- **Status:** Reports display as Pending, Approved, Declined, Awaiting User Approval, Declined by User, Under Review, or Canceled. Select search criteria from the drop-down list of these choices and All.
- **Approved By:** Enter search criteria in the open-entry text box.

Agent

- **Agent:** Enter search criteria in the open-entry text box.
- **Location:** Enter search criteria in the open-entry text box.

Team

- **Team:** Enter search criteria in the open-entry text box.
- **Team Supervisor:** Enter search criteria in the open-entry text box.

Labor Unit

- **Labor Unit:** Enter search criteria in the open-entry text box.

Skill

- **Skill:** Enter search criteria in the open-entry text box.

Shifts

The following fields are available for ad hoc reporting on **Shifts**.

Shift

- **Agent Name:** Enter search criteria in the open-entry text box.
- **Shift Start:** Click the calendar icon to enter search criteria using date selector.
- **Shift End:** Click the calendar icon to enter search criteria using date selector.
- **Shift Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Activity:** This is the type of activity (e.g. lunch, meeting, training, break, etc.) Enter search criteria in the open-entry text box.
- **Activity Start:** Click the calendar icon to enter search criteria using date selector.
- **Activity End:** Click the calendar icon to enter search criteria using date selector.

- **Activity Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Is Paid:** Reports display as Yes or No. Search criteria values are presented in drop-down list: All, Yes, No.
- **Late Threshold:** Enter search criteria in the open-entry text box; numeric values only.

Labor Unit

- **Labor Unit:** Enter search criteria in the open-entry text box.

Skill

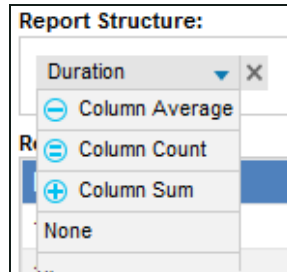
- **Skill:** Enter search criteria in the open-entry text box.

Team

- **Team:** Enter search criteria in the open-entry text box.
- **Team Supervisor:** Enter search criteria in the open-entry text box.

About Report Structure

All ad hoc reports use the same basic structure, and offer the same options for layout and formatting. Layout and format choices are made using drop-down lists at the top of the **Report Builder** window. There are three layout options: **Simple Table**, **Summary Table** and **Matrix Table**. There are two reporting format options: **RDL** and **HTML**.



When you see a downward arrow next to a field label in the **Report Structure** area, there may be additional reporting options for that field. These options vary depending on the data type, but include **Column Average**, **Column Count**, and **Column Sum**. The results are totaled per summary group, and per total of all groups at the bottom. This data is also used to generate charts.

In the **Report Structure** area, columns represent what will be X-axis chart labels and rows represent Y-axis chart labels. You can't duplicate fields within the row or column areas. However, you can use the same field to create both a row and a column if appropriate.

You can rearrange fields by dragging them to a different location within the same area. Fields can't be moved between column and row areas in summary or matrix table reports – you must remove and re-add them. The report data preview will update based on changes you make in the Report Builder.

Simple Tables are basic, list-style reports displaying a single row of fields in the Structure area. Columns can be rearranged by dragging fields left and right. Charts are not supported.

Report Structure:

Call Volume Date/T... Split Offered Calls Answered Calls

| Call Volume Date/Time | Split | Offered Calls | Answered Calls |
|-----------------------|-------|---------------|----------------|
| 4/6/2014 9:30:00 AM | 15 | 0 | 0 |
| 4/6/2014 10:00:00 AM | 15 | 0 | 0 |
| 4/6/2014 10:30:00 AM | 15 | 0 | 0 |
| 4/6/2014 11:00:00 AM | 15 | 1 | 1 |
| 4/6/2014 11:30:00 AM | 15 | 0 | 0 |
| 4/6/2014 12:00:00 PM | 15 | 0 | 0 |
| 4/6/2014 12:30:00 PM | 15 | 0 | 0 |
| 4/6/2014 1:00:00 PM | 15 | 0 | 0 |
| 4/6/2014 1:30:00 PM | 15 | 0 | 0 |
| 4/6/2014 2:00:00 PM | 15 | 0 | 0 |

Summary Tables feature nested, collapsible subcategories/groupings of a grid of fields in the Structure area. Column fields can be dragged left and right to rearrange. Rows can be dragged up and down to regroup data. Lower fields are nested within higher fields. Bar and pie charts are supported.

Report Structure:

Agent Answered Calls Service Level Calls

Labor Unit

| Agent | Answered Calls | Service Level Calls |
|--------------------------|----------------|---------------------|
| Labor Unit : Corax - HSI | | |
| 205 | 28 | 16 |
| 205 | 28 | 16 |
| 205 | 28 | 16 |
| 205 | 28 | 16 |
| 205 | 28 | 16 |
| 205 | 28 | 16 |
| 205 | 28 | 16 |
| 205 | 28 | 16 |
| 205 | 28 | 16 |
| 205 | 28 | 16 |

Matrix Tables measure one or more pieces of information across a period of time. Fields controlling the information to be measured and the time range are displayed in the Columns area, and are limited to one field in each area per report. Fields that control grouping of that information are displayed in the Rows area. Multiple fields can be dragged, dropped and rearranged to provide for different logical groupings of the information. Bar, pie and line charts are supported. Bar, pie and line charts are supported, but line charts illustrating large data sets may be difficult to read. This example shows Leave Types per Agent per Quarter.

Report Builder

Generate Report Preview Cancel Save As Save Publish

Report Name: Leave by Agent by Quarter Layout: Matrix Table Reporting Format: RDL Description:

Fields: Drag fields to criteria and report.

- Leave Requests
 - Agent
 - Agent Name
 - Location
 - Team
 - Labor Unit
 - Skill

Criteria:

| Table | Field | Operator | Value | On Report | Action |
|----------------|------------|--------------------------|---------------|--------------------------|-------------|
| Leave Requests | Start Date | Greater than or equal to | 01/01/2014 | <input type="checkbox"/> | Back |
| Leave Requests | Start Date | Less than or equal to | 08/30/2014 | <input type="checkbox"/> | Back |
| Agent | Agent Name | Does not contain | Administrator | <input type="checkbox"/> | Back Delete |

Chart Type:

Summary

Agent Name

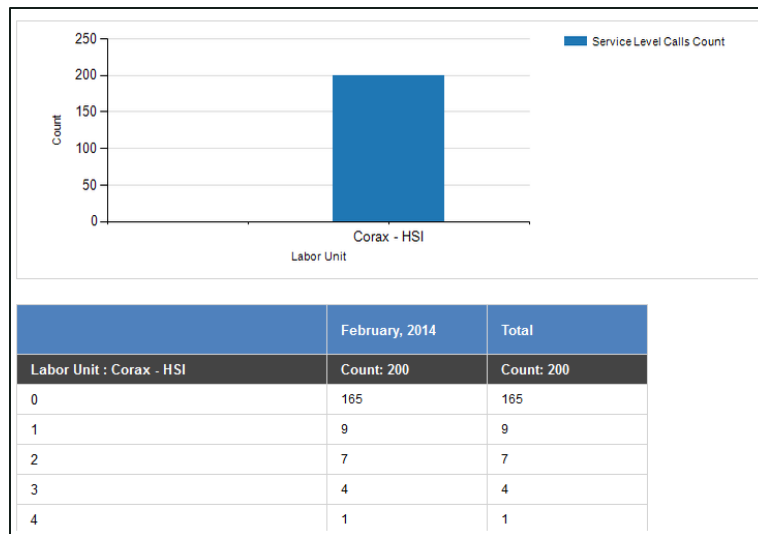
Columns

Leave Type Count

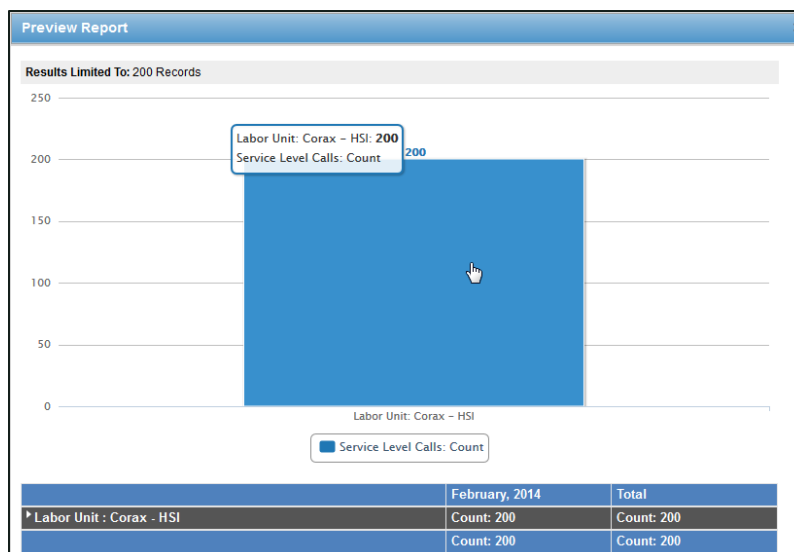
Report Structure:

| Agent Name | Leave Type | Start Date - Quarter | Q1 - 2014 | Q2 - 2014 | Total |
|------------------------------|--------------|----------------------|-----------|-----------|-------|
| Agent Name : Ayala, Daniel | Count: | | 2 | 0 | 2 |
| | Call Off | | 2 | 0 | 2 |
| Agent Name : George, Gina | Count: | | 1 | 0 | 1 |
| | Call Off | | 1 | 0 | 1 |
| Agent Name : Ryan, Phillip | Count: | | 2 | 0 | 2 |
| | Call Off | | 2 | 0 | 2 |
| Agent Name : Hamilton, Brian | Count: | | 0 | 1 | 1 |
| | PTO/Vacation | | 0 | 1 | 1 |
| | Count: | | 5 | 1 | 6 |

The **RDL** report format works with Microsoft SQL Reporting Services and provides export formats of PDF, Microsoft Word, or Microsoft Excel files. Charts are simply laid out, displaying all the information in a non-interactive way. Large reports with pagination can be created. Categories and groupings in RDL reports are expanded by default.



HTML reports and charts are interactive, allowing information to be displayed on mouse-over. Clicking bars within a chart allows you to drill down into subcategories and see more detailed results. If there are multiple detail levels, clicking through will loop back to the top level. However, this format cannot be exported, does not support pagination, and is limited to displaying only 1000 results. HTML works best as a basic data preview, or for reports that will only be viewed online. Categories and groupings in HTML reports are collapsed by default.



About Chart Types in Ad Hoc Reports

The **Chart Type** area allows you to select a chart to graphically display the data in your report. Available charts depend on the report layouts you select. You will only see icons for charts supported by the chosen layout. Available icons appear in gray; an icon changes to color when selected.

Beneath the icons are fields you can choose to display on the chart, depending on the report layout and data. For summary and matrix table reports, fields in the rows area appear under **Summary**, while choosing **Column Average**, **Count**, or **Sum** for columns displays those values under **Columns**. Vertical and horizontal bar graphs support multiple data types on both columns and rows. Pie charts and line graphs support only select one entity each for **Summary** and **Column**.

About the Ad Hoc Report List

When you create an ad hoc report, the **Ad Hoc Report Builder** associates and saves the following information with the name you give the report:

- RDL/HTML data that defines the report columns, layout, and criteria parameters.
- Report criteria values data for the report.

Your reports can be accessed again from the **Ad Hoc Report List**. The list displays all reports associated with the type of report you select from the drop-down list. In this example, the list shows reports for ACD Call and Agent Data.

| Report | Description | Status | Saved By | Date Saved | Published By | Date Published | Action |
|-------------------------------------|-------------|--------|-------------|------------|--------------|----------------|---|
| ACD Agent Data - Simple | | Saved | User, Admin | 5/23/2013 | NA | NA | View Delete |
| ACD Agent Data - Summary - HTML | | Saved | User, Admin | 5/23/2013 | NA | NA | View Delete |
| ACD Agent/Split - Simple | | Saved | User, Admin | 5/23/2013 | NA | NA | View Delete |
| ACD Agent/Split - Summary | | Saved | User, Admin | 5/23/2013 | NA | NA | View Delete |
| ACD Split - Simple Criteria | | Saved | User, Admin | 5/23/2013 | NA | NA | View Delete |
| ACD Split - Summary Criteria | | Saved | User, Admin | 5/23/2013 | NA | NA | View Delete |
| Remaining ACD Fields - Summary HTML | | Saved | User, Admin | 5/23/2013 | NA | NA | View Delete |

Pages 1 10 Items Per Page Go to page: 1 of 1 Go

The list is sorted alphabetically by report name. You will be able to see any reports that you've created, whether saved as Public or Private, and any reports created by other users and shared as Public. The **Saved By** column displays the name of the last user to save changes to the report.

Saved reports can be removed from the system by clicking the report's **Delete** button. Deleting a report removes the saved report and all saved search criteria for the report.

Create an Ad Hoc Report

The procedure for creating an ad hoc report is the same for each report category. For example, an ACD Call and Agent Data report is created using the same steps as those for creating a Shift ad hoc report.

During this procedure, a preview of report data will appear in the lower portion of the Report Builder window. You can click **Save** at any time to apply changes and update the data preview. To see a preview of how the report and chart (if applicable) will look when rendered:

- Click **Preview**.

To create a new report:

1. Click the **Reports** tab and then click **Ad Hoc**.
2. Select the desired category of reports from the drop-down list.
3. Click **Create a Report** in the upper right corner.
4. Enter a **Report Name**.
5. Enter a **Description** (optional) of up to 100 characters.
6. Choose a **Layout** from the drop-down list.
7. Choose a **Reporting Format** from the drop-down list.
8. Drag the desired fields into the **Report Structure** area. To remove a field, click the X on the field label.
9. Set any additional reporting options if desired. For related information, see [About Report Structure](#).
10. Drag any desired fields to the **Criteria** section, select an operator and enter a value. For related information, see [About Ad Hoc Report Fields and Criteria](#).
11. Set **Chart Type** options if desired.
12. Click **Save**.

Save Ad Hoc Report Criteria

When you save a finished ad hoc report, you can also choose whether to separately save the criteria used to build the report. This option allows you to manipulate the criteria separately from the report, and more easily generate the same report for multiple sets of criteria. For example, you might have a report that is regularly run for one Team, but might need to be run for other Teams in the future. By saving the criteria, you can easily create multiple versions of the report for the different Teams without having to rebuild the entire report. Saving the criteria as public will

make the set available to others who build ad hoc reports. To save the report criteria:

1. Follow the procedure to [Create an Ad Hoc Report](#).
2. Select the **Save report criteria** check box in the **Save Report** dialog box.
3. Enter a **Report Criteria Name**.
4. Select either **Private** or **Public** from the drop-down **Access** menu.
5. Click **Save**.

Edit Existing Ad Hoc Reports

Editing a saved ad hoc report can be used to:

- Change a report that is being developed and reviewed.
- Change a report that has been approved and used but requires changes to meet new or different information needs.
- Create a new report from an existing report.
- Publish a saved report, which stores a copy of the report on the Report Server and allows the report to be rendered on that server if desired. This can sometimes be beneficial in environments where the Report Server and the Clarity applications are on different physical or virtual machines.

Editing an existing report can cause saved report criteria to stop working, so you should use the **Save As** function to save a new version of the report for editing. Choosing **Save As** also lets you save criteria associated with the new version.

If you choose to **Save** the existing report, Clarity applies your changes to the existing report and updates that report with the new name. You cannot save new criteria at this point. To add new criteria or change the operators for existing criteria, you must use **Save As** to create a new version of the report.

To edit an ad hoc report:

1. Click the **Reports** tab and then click **Ad Hoc**.
2. Select the desired category of reports from the drop-down list.
3. Double-click the desired report or click **View** at the right end of the report's row in the list.
4. Click **Edit** and make any desired changes to the report. For related information, see [About the Ad Hoc Report Builder](#).
5. Click **Save** or **Save As**.

Generate an Ad Hoc Report

Once an ad hoc report has been saved, it can be generated in multiple iterations using different search criteria (e.g., date ranges, user names).



Generated reports appear onscreen with a control bar (shown here) that lets you:

- Navigate through the pages of the report.
- Search for specific terms in the report.
- Export the report in the following formats: Microsoft Excel, Microsoft Word, PDF.
- Refresh the report information based on new data received by the system.

Columns in simple and summary layout reports can be sorted by toggling the ascending/descending arrows in the column headers.

To generate an ad hoc report:

1. Click the **Reports** tab and then click **Ad Hoc**.
2. Select the desired category of reports from the drop-down list.
3. Double-click the desired report or click **View** at the right end of the report's row in the list.
4. From the **Report Builder** bar, click **Generate Report**.
5. Enter your criteria or double-click to select an existing set of **Saved Search Criteria**. Expand or collapse the **Search Criteria** and **Saved Search Criteria** sections as needed.
6. Click **Generate Report**.

Publish an Ad Hoc Report

Only published reports can be used in Report Subscriptions. To publish a report:

1. Click the **Reports** tab and then click **Ad Hoc**.
2. Select the desired category of reports from the drop-down list.
3. Double-click the desired report or click **View** at the right end of the report's row in the list.
4. From the **Report Builder** bar, click **Publish**.
5. Enter a new name for the report if desired, and click **OK**.

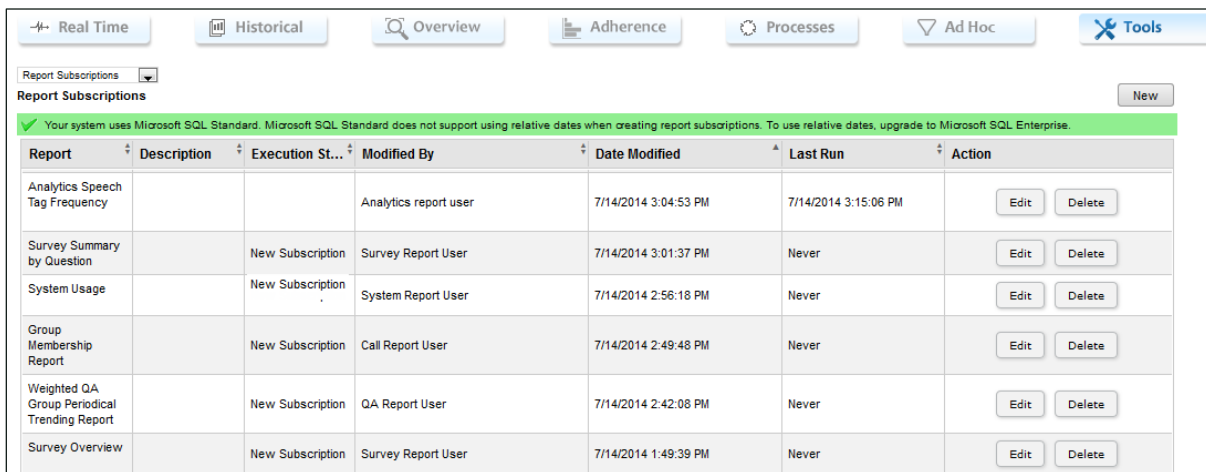
Note: Once a report has been published, it can no longer be edited. However, it can be used as the basis for a new report. Clicking **Edit** on a published report launches a pop-up warning.

Report Tools

About Report Subscriptions

Note This section covers use of report Subscriptions in a standalone Clarity system. If you have a hybrid Discover/Clarity system, refer to the "Report Subscriptions" section of the *Uptivity Discover Reporting Manual* for your software version.

Report subscriptions allow you to pre-schedule specific reports and provide the results to multiple users. They are managed from the **Report Subscriptions** page in your Clarity web portal. You must have permissions to create and edit ad hoc reports. In addition, you can only create subscriptions for reports to which you have permissions. If you need to work with report subscriptions and are unable to do so, see your Clarity administrator.



The screenshot shows the 'Report Subscriptions' page in the Clarity web portal. The page header includes navigation tabs: Real Time, Historical, Overview, Adherence, Processes, Ad Hoc, and Tools. Below the header, there is a 'Report Subscriptions' section with a 'New' button. A green banner at the top of the table area contains a warning: 'Your system uses Microsoft SQL Standard. Microsoft SQL Standard does not support using relative dates when creating report subscriptions. To use relative dates, upgrade to Microsoft SQL Enterprise.' The table below has the following columns: Report, Description, Execution St..., Modified By, Date Modified, Last Run, and Action. The table contains six rows of report subscriptions, each with an 'Edit' and 'Delete' button in the Action column.

| Report | Description | Execution St... | Modified By | Date Modified | Last Run | Action |
|--|-------------|------------------|-----------------------|----------------------|----------------------|-------------|
| Analytics Speech Tag Frequency | | | Analytics report user | 7/14/2014 3:04:53 PM | 7/14/2014 3:15:06 PM | Edit Delete |
| Survey Summary by Question | | New Subscription | Survey Report User | 7/14/2014 3:01:37 PM | Never | Edit Delete |
| System Usage | | New Subscription | System Report User | 7/14/2014 2:56:18 PM | Never | Edit Delete |
| Group Membership Report | | New Subscription | Call Report User | 7/14/2014 2:49:48 PM | Never | Edit Delete |
| Weighted QA Group Periodical Trending Report | | New Subscription | QA Report User | 7/14/2014 2:42:08 PM | Never | Edit Delete |
| Survey Overview | | New Subscription | Survey Report User | 7/14/2014 1:49:39 PM | Never | Edit Delete |

The Report Subscriptions page header identifies your version of SQL.

You cannot use HTML reports with subscriptions.

Report Subscriptions can be scheduled individually, or you can use a shared schedule for multiple subscriptions.

Report Subscriptions are private; only the subscription creator can view and edit the subscription's settings.

Subscription Delivery Methods

Reports can be delivered in one of two ways:

- **Email:** in this method, the application sends the report directly to one or more recipients. The email subject is automatically completed with the report name and the time it was run, but you can customize this if desired. You can also choose the priority at which the email is sent, and include comments for the body of the email.

You can send the report as an email attachment or you can include a link from which the recipient can launch the report. The latter method can conserve network bandwidth but it also requires that every recipient be assigned a user account on the SQL Report Server since that is where the report file is located. Uptivity recommends that you discuss this with your system administrator and your Uptivity installation engineer before deciding to provide reports as links.

To deliver report subscriptions via email, the application must have an email account configured for its use on the SQL Report Server. This is typically done during the installation process.

- **File Share Delivery:** in this method, the application creates the report and saves it to a network file share where users can access it. You can choose a filename for the report and whether to append a file extension to that filename. You can also choose to overwrite existing files with newer versions, to not overwrite files if previous versions exist, or to increment file names as newer versions are added.

To deliver reports via file share delivery, you will need to provide the application with a full UNC path to the network share, as well as credentials to write to that location. If Clarity cannot save the report, you will see "File share write failure" as that report's Execution Status.

Load the Report Subscriptions Page

To load the **Report Subscriptions** page in Clarity:

1. Click the **Reports** tab and then click **Tools**.
2. Select **Report Subscriptions** from the drop-down list.

Create a Report Subscription

New subscriptions are created on the **Report Subscription** page. You can create a subscription for any printable report or published ad hoc report to which you have appropriate access and permissions. Reports in subscriptions can be rendered in these formats: comma-delimited (CSV), Acrobat (PDF), web archive (MHTML), Microsoft Excel, Microsoft Word, image (TIFF), or XML with report data.

To create a report subscription:

1. Load the **Report Subscriptions** page and then click **New** at the top-right corner of the page.
2. Choose a report from the **Select a Report** drop-down list.
3. Enter a custom title for your subscription in the **Description** field (required).
4. Select the report delivery method from the **Delivered by** drop-down list.
5. Set the options associated with your delivery method. For related information, see [Set Email Delivery Options](#) or [Set Windows File Share Delivery Options](#).
6. Select the option to run the subscription **On a Shared Schedule** or **When the scheduled report run is complete**. If you choose the shared schedule option, you will also need to select the desired schedule from the drop-down list.
7. Set the options associated with your schedule. For related information, see [Set Schedule Options](#).
8. Set the report parameter values if needed. Refer to the specific report description for more information on parameters associated with that report.

Note: Certain reports have default values associated with some or all of their parameters. As a time-saver, these parameters appear with a "Use default" check box next to them. When you initially create the report, you can leave this box selected to use the default value or you can clear it to enter specific values. The check box has no effect once the report subscription has been created and should be disregarded thereafter.

9. Click **Save**.

Set Email Delivery Options

Options for delivering reports via email are configured as a sub-task of the procedure for creating a report subscription. After following these steps, you will need to complete the [Create a Report Subscription](#) procedure.

To set up email delivery options:

1. In the **To:**, **Cc:** and **Bcc:** boxes, enter email address(es) for primary recipient(s) and secondary recipient(s). Use a semi-colon to separate addresses.
2. In the **Reply-To:** box, enter the email address to which recipients should respond if they have questions. This field is required.
3. In the **Subject** box, enter a new subject line if desired; otherwise, use the default subject created by the application.
4. Select the check box for **Include Report** to send the report as an email attachment.
5. Select the check box for **Include Link** to send a link that recipients can use to open the report on the SQL server. For related information, see [Subscription Delivery Methods](#).
6. Select the desired **Render Format** from the drop-down list.
7. Select the desired **Priority** for the email report deliveries from the drop-down list.
8. In the **Comment** box, enter any text you want to be included in the email body.

Set Windows File Share Delivery Options

Options for delivering reports via Windows file share are configured as a sub-task of the procedure for creating a report subscription. After following these steps, you will need to complete the [Create a Report Subscription](#) procedure.

To set up file share delivery options:

1. In the **File Name** box, enter the name of the saved report file. This does not have to be the same as the name of the report.
2. Select the check box for **Add a file extension when the file is created** if desired.
3. In the **Path** box, enter the complete UNC path for the location where the report will be saved.
4. In the **Username** and **Password** boxes, enter the credentials the application will use to access the file share.
5. Select your desired **Overwrite** option.

Set Schedule Options

Schedule options for report subscriptions are configured as a sub-task of the procedure for creating a report subscription. The options are the same for shared schedules and individual report schedules. Schedule details will vary based on the frequency at which you choose to run the schedule. After following these steps, you will need to complete the [Create a Report Subscription](#) procedure.

To configure schedule options:

1. Select the frequency at which you want the schedule to run: Hour, Day, Week, Month, or Once.
2. Configure the schedule details in the corresponding box (e.g. Hourly Schedule, One-time Schedule, etc.).
3. Click the calendar icon and use the date selector to set the date to **Begin running this schedule**.
4. Select the check box to **Stop this schedule** if desired, and then click the calendar icon and use the date selector to set the date for the schedule to stop.

Manage Report Subscriptions

Several routine management tasks can be done from the Report Subscriptions page.

Sort the Report Subscriptions List

To sort the Report Subscriptions list by the contents of a column:

- Click the triangle in the upper right corner of the column heading to sort in ascending order, or the inverted triangle to sort in descending order.

Edit Report Subscriptions Settings

To edit the settings of a subscription:

1. Click **Edit** in the **Action** column for the desired subscription.
2. Edit the desired settings and click **Save**.

Delete Report Subscriptions

You can delete report subscriptions that are no longer needed. However, recipients of that subscribed report will not be automatically informed that the subscription has been deleted.

To delete an existing subscription:

1. Click **Delete** in the Action column for the desired subscription.
2. Click **OK** to confirm the deletion.

About Shared Schedules

Shared schedules can be used to execute multiple reports simultaneously. You must have permissions to create and manage shared schedules. If you need to work with shared schedules and are unable to do so, see your Clarity administrator.

Load the Shared Schedules Page

To load the **Shared Schedules** page in Clarity:

1. Click the **Reports** tab and then click **Tools**.
2. Select **Shared Schedules** from the drop-down list.

Create a New Shared Schedule

To create a new **Shared Schedule**:

1. Load the **Shared Schedules** page in Clarity and click **New**.
2. Enter a **Schedule Name** (up to 100 characters) as you want it to appear in the listing of shared schedules.
3. Set the individual schedule details. For related information, see [Set Schedule Options](#).
4. Click **Save**.

Manage Shared Schedules

Several routine management tasks can be done from the **Shared Schedules** page.

Sort the Shared Schedules List

To sort the **Shared Schedules** list by the contents of a column:

- Click the triangle in the upper right corner of the column heading to sort in ascending order, or the inverted triangle to sort in descending order.

Edit a Shared Schedule's Settings

To edit the settings of a **Shared Schedule**:

1. Click **Edit** in the **Action** column for the desired schedule.
2. Edit the desired settings and click **Save**.

Delete Shared Schedules

You can delete **Shared Schedules** that are no longer needed. Deleting a **Shared Schedule** will cause those schedule settings to be individually reassigned to report subscriptions that use the schedule.

To delete an existing **Shared Schedule**:

1. Click **Delete** in the **Action** column for the desired schedule.
2. Click **OK** to confirm the deletion.

Pause/Resume a Shared Schedule

To stop running (pause) a **Shared Schedule** that has not expired:

- Click **Pause** in the **Action** column for the desired schedule.

To resume running a **Shared Schedule** that has been paused, and has not expired:

- Click **Resume** in the **Action** column for the desired schedule.

Forecast Call Volumes

The **Forecast** tab provides the means to create forecasts: predictions of future call volumes for specific periods based on historical call volumes. These forecasts can then be used to create schedules.

Forecasting involves these tasks:

- Create a historical call volume set by acquiring and modifying data – The purpose of this task is to identify a call volume trend that will be used to forecast future call volumes.
- Create a forecast.

Call volumes change for these factors:

- Time of day
- Seasonal or recurring events such as holidays or monthly billing statement distribution dates.
- One-time events such as natural disasters, storms, or marketing events.
- Business changes that increase or decrease volumes, e.g. adding new clients, product changes that make the product easier to use, etc. These changes typically produce either a short or long term trend.

Data selection and modification determine how well a prediction accounts for these factors. At times factors may be combined. For example, an annual holiday may occur while the call center is supporting a new client that has increased call volumes.

Follow these tips for creating forecasts:

- Develop a naming convention for forecasts, forecast data sets, and schedules before creating any of them. A naming convention is especially useful if multiple managers create and share these items.
- Multiple forecasts may be needed for the same time period in order to determine which one best predicts call volumes. Each of these forecasts may use different data or the same data. The same adjustments or different adjustments may be made to the data sets. For reporting purposes, you can designate one of these forecasts to be "used for reporting" for the time period.
- Track data and adjustments made to create a forecast, so reasons behind forecast differences are clear.

- Use data from a period similar to the forecasted period. If an annual holiday occurs during the forecasted period, use last year's data for that holiday. If forecasting for a group that will handle calls related to launch of a new product, identify a period when that group or another group handled calls for a product launch.
- Compare forecasts to actual call volumes to identify strengths and weaknesses in the process.
- Clarity lets you create forecasts with any amount of data, but not having enough data available can cause the application to return unexpected results. A best practice is to acquire data for at least two weeks before creating a forecast.

Tip: You can print Forecast pages that have the Print icon ()

Import Data from a File

Note: In Clarity, call volume data is related to a device. Importing data from a file overwrites data for that device that may be acquired from other sources (e.g. other imports or direct ACD integrations). Your Clarity administrator should be aware of and involved with any data imports.

Call volume data can be exported from an ACD or another system (or manually entered in Excel), and then imported to Clarity as a CSV (comma separated values) file. This method is particularly useful if an ACD does not integrate directly with Clarity or if there is no ACD in use.

In order to maintain consistency for manually loaded data and forecasts, users should:

- Create a generic device in Clarity for current and future call data.
- Always select that device when uploading data for it.
- Keep the CSV file and add future data to the file, then upload the entire file/data set.

Due to SQL limitations, your CSV file may contain no more than 10,000 rows. To be compatible with Clarity, the data must be formatted into columns as follows, with the first row in the CSV file showing the column name. A generic error message appears if the file does not follow the required data format. The names are not case-sensitive. The names are:

- **split-number:** Number must match a split/skill/hunt group/queue on the PBX.
- **split-name:** A new skill is created with this name if a Call Split for the given split-number does not already exist on the device.
- **Timestamp:** Formatted in either **Unix time** in seconds or **ISO 8601** as hh:mm:ss or h:mm:ss.
- **interval-seconds:** Length of the interval in seconds.
- **offered-calls:** Number of calls on the split during the time interval.
- **answered-calls:** Number of calls answered during that interval on the split.
- **service-level-calls:** Number of calls answered within service level during that interval on the split.
- **abandoned-calls:** Number of calls abandoned during that interval on the split.
- **abandon-seconds:** Number of seconds spent in queue by callers who abandoned during that interval on the split.

To import a CSV data file:

1. Click the **Forecast** tab and then click **Acquire**.
2. Click **Import data from a file** and select the appropriate device from the drop-down list.
3. Click **Browse**. Navigate to the file location, select the file and click **Open**.
4. Click **Next** and then click **Save** to complete the import process.

Importing data in this way may require some adjustments to the Skills, Service Levels and Labor Units in your system. For example, if the imported data included a split not currently in the database, Clarity creates a new Skill for that split name and number. Your Clarity administrator can make the necessary adjustments.

Once the data has been imported, it can be used to create a historical call volume set by selecting "Use data from device" during the Acquire step of Forecasting.

Create a Historical Call Volume Set

Select Data from Devices

Some Clarity systems have integration with the PBX/ACD which provides a data feed of information. In other systems, this data may have been imported from PBX/ACD via the [Import Data from a File](#) procedure.

To select call volume data from a device in your telephony network:

1. Click the **Forecast** tab and then click **Acquire**.
2. Click **Use data from a device** and select the appropriate device from the drop-down list.
3. Click the **From** date field and select a date on the calendar.
4. Click the **To** date field and select a date on the calendar. Data between these dates will be loaded.
5. Select one or more Labor Units from the list. Only the Labor Unit(s) with Skills that match skills/splits on the selected device are used in the forecast. For example, if a Labor Unit has three Skills and the device has two additional skills, only call data for the three skills in common will be pulled from the imported call history.
6. Click **Next**. The data is loaded and displayed for modifying.

Select Data from an Existing Data Set

Use this procedure to create a new historical data set from an existing one. This method allows you to create and compare multiple forecasts using one data set and different modifications. For example:

- You start with data and make three modifications. You think two additional modifications might be needed. In this case, make the three modifications and save the data set. Then open that data set, make the two additional modifications, and save the data set under a different name. Create forecasts using each data set and compare the results. If you want to start with the same data but make completely two different sets of modifications, you have to select the data from devices twice to create two different data sets.
- You create, select and modify the historical data. When you review the data trend, you realize additional modifications are needed. At that point, return to this step, select the data set and make the additional modifications.

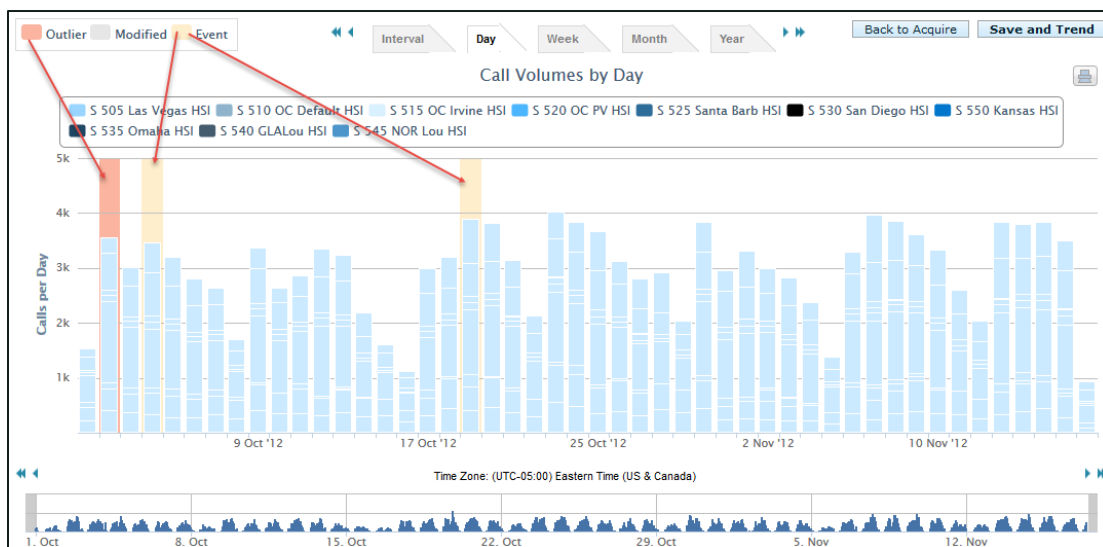
To create new call volume data set from an existing data set:

1. Click the **Forecast** tab and then click **Acquire**.
2. Click **Use existing acquired data set**.
3. Select the acquired set you wish to use from the drop-down list.
4. Click **Next**. The data is loaded and displayed for modifying.

Modify a Historical Call Volume Set

After a historical call volume data set is acquired, you can modify it. When Clarity calculates trends, forecasts, and predictions, it considers time-of-day and recurring factors (e.g. the first day of the month) that affect call volume. It cannot consider one-time events or business changes. User modification of the historical data is required to incorporate these factors in the analysis. The possible adjustments are described below.

If you plan to use the data to create a forecast, you must save it even if no adjustments are made. If the data does not adequately meet the forecasting need, the process can be restarted by going back to the Acquire step.



The way the data is displayed varies based on what data was imported. This example shows data imported from an ACD for one Labor Unit that contained multiple Skills. The call data display is organized using these items:

- **Skills key:** A Labor Unit's Skills appear above the bar chart, with each Skill having its own color code. The color of the bands will change to indicate each Skill as you mouse over it, so you can easily see all columns on which that Skill is represented. Clicking a Skill removes that Skill from the columns. This can make it easier to review Skill call numbers, but it has no effect on the trend calculation.
- **Time Unit Tabs:** Data can be displayed according to different units of time: interval, day, week, month and year. The Interval tab displays data in 15 minute periods. The display uses the Time Zone associated with your Location, which may be different than that of the Labor Units in the data set.

- **Columns:** Columns are a graphic representation of call volume, outliers and events. As you mouse over a column band, a pop-up will display the time period and number of calls for the Skill. The Week and Month pop-ups also show any associated Events and Comments. Mousing over an outlier will also provide additional information.
- **Display Time Period Bar:** The white area of this bar corresponds to the information shown in the Calls per Day graph. To select a time period, click the bar and drag to another area on the bar. For example, to see calls for two days, click the **Day** tab, then drag the cursor over the specific two days you wish to view.
- **Arrow navigation buttons:** The <- and -> buttons change the data columns displayed (i.e., either earlier or later data).

Manually Modify Data

| Skill Name | Current | New |
|---------------------|---------|-----|
| S 505 Las Vegas HSI | 2777 | -- |
| S 520 OC PV HSI | 614 | -- |
| S 530 San Diego HSI | 6809 | -- |

Manually modifying data is an alternative to auto-correction. Call volume data for Skills can be modified to reflect expected differences between the historical and forecasted period. Data modifications can be applied to up to 31 days of data in a single operation.

The table at the upper right of the **Modify Call Volume** box shows the selected Skills and the effects of your modification selections, and updates as you make changes. **New** increases are shown in green and decreases are shown in red.

The system requires that a Modification Reason be entered for ease of understanding when the modified set is viewed. The reason, along with the corresponding timestamp and username, will display in the pop-up that appears when you mouse over the modified columns.

Data can be modified by:

- **A set number.** On the **Day**, **Week**, and **Month** tabs, changes made to call volume data for a selected time period occur on every interval included in that time period. For example, if the day March 23, 2013 is selected and modified with an increment of one call, for each of the selected Skills, all 96 15-minute intervals in that day will be increased by one call. So if one Skill was selected, that day will be incremented by 96 calls – one call for each interval in that day. If three Skills were selected, March 23 would be increased by 96×3 calls. Alternately, adding one call on the **Interval** tab would add one call per selected Skill for that interval.
- **A percentage.** If background calculations produce a fractional result, the system will always round up (i.e., 10% of 63 calls equals 6.3 calls, the system would adjust by 7 calls).

To manually modify data in a displayed data set:

1. Click the desired Time Unit tab.
2. Click the data column to be modified.
3. Right-click the selected column(s).
4. Select **Modify Selected**.
5. Adjust the starting and ending dates and times if needed. The ending date/time should be set to the first interval following the range to be modified; it will not be altered.
6. Select the desired skills from the **Selected Skills** drop-down menu.
7. Select the desired **Modifier**.
8. For **Value**, select **Increase** or **Decrease** from the drop-down list and enter the number of calls or percent by which to adjust the call volume.
9. Enter a comment under **Modification Reason** and then click **Save**.

Auto-Correct Selected Data

Clarity's algorithms detect many outliers, but may not detect them all. If an interval appears to have an unusually high or low call volume, you can [Manually Modify Data](#) or let Clarity auto-correct it. Auto-correcting adjusts the interval to the historical trend calculated by Clarity. Adjustments may be minor and difficult to see.

To auto-correct data in a displayed data set:

1. Click the desired Time Unit tab.
2. Right-click the data column(s) to be modified and select **Auto-correct**.

Add Events to Data

Events can be seasonal, recurring, or one-time business events that can affect call volumes. Data associated with an event displays with a yellow background. Events can help explain why data was modified or why a particular day requires additional or fewer employees.

Adding an event on any level will add it to all affected levels. For example, if you add the event Spring Sale at the **Month** level, that event will also appear for every week in the **Week** level, day in the **Day** level, etc.

To add an Event to a selected data column in a displayed data set:

1. Click the desired Time Unit tab.
2. Right-click the data column(s) to be modified and select **Add event to selected**.
3. Select an event type from the list box or select **New Event Type** and enter a **Name** for the new type.
4. Enter a **Comment** and click **Add**.

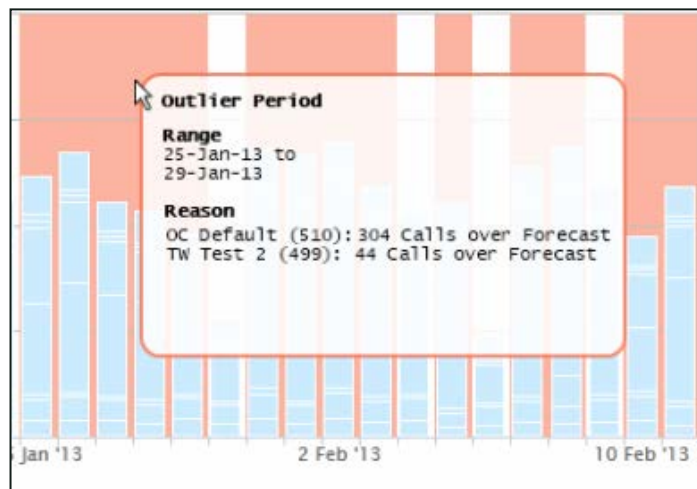
To clear an event from a single data column without removing it from others on that level:

- Right-click the column and select **Clear events from selected**.

Auto-Correct Outliers

On the **Interval** and **Day** tabs, outliers are indicated by dark pink backgrounds. Outliers are data columns that deviate significantly from the call volume data range norm. Place your mouse cursor over the outlier area to display range and reason details about the outlier period, separated by Skill.

For example, if a Skill usually handles 25 calls in a 15-minute interval but on one day handles 150 calls during that interval, Clarity would tag that interval as an outlier. Outliers can occur for a wide variety of reasons, such as holidays, new product releases, or weather or technology-related service outages.



If the cause of the outlier is not likely to reoccur in the coming period (e.g. a weather event), the data entry can be adjusted so that it does not affect the forecast. If the cause of the outlier is likely to reoccur (e.g. a regular department meeting), it may be best to leave the data as is.

To automatically modify outliers in a displayed data set:

- Right-click anywhere within the **Calls per Day** graph and select **Auto-correct outliers**.

Undo/Revert Changes

To undo data modifications, events, and other changes to a displayed data set:

1. Click one or more modified data columns (skip this step if you are undoing all changes).
2. Right-click the selected columns.
3. Click **Revert selected** to undo changes to only the selected columns. Click **Revert all** to undo all changes.

Save the Modified Data Set

To save a displayed call data set for use in creating a forecast:

- Click **Save and Trend**, then enter a name for the data set. The system automatically appends the date to the end of the name. Click **Save**.

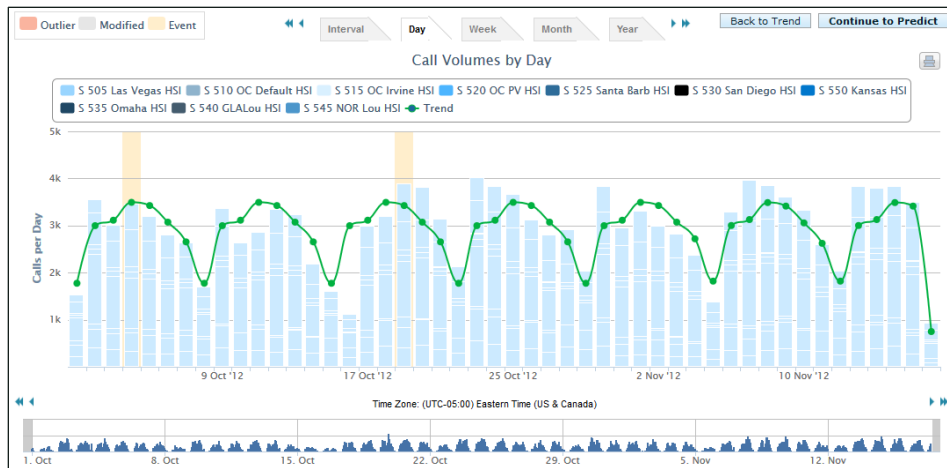
Create a Call Volume Forecast

A forecast can be created from any existing historical call volume set. However, in a rapidly changing call center, volumes can change dramatically in short periods of time. Supervisors must use their best judgment in determining whether an existing set should be modified or a new set should be created. Forecasts can become more accurate when you use Clarity's capabilities to review the call volume trend and predict the call volume.

Reviewing the call volume trend lets you determine whether the historical call volume set accurately reflects your expectations of the call volume for the period being forecasted and scheduled. **Predicting** the call volume lets you see the forecast Clarity has generated, and make further modifications based on current knowledge and events that would not have been present in the historical data set.

Review the Call Volume Trend

Note: You can skip this task if you are satisfied with your data set.



The call volume trend line shows what the Clarity forecasting model *would have predicted* the call volume to be. The trend is based on multiple calculations of the average number of calls for time intervals: 15 minute blocks, hours, and days. Each of those calculations identifies several factors in the data, such as days of the week and month, and makes adjustments for each factor.

The same data and formulas used to calculate the trend will be used to calculate the forecasted call volume. The more accurately the trend reflects historical performance, the more accurately it will predict future volume. If the trend differs significantly from the actual historical call volume, you may wish to further adjust your data set.

To review the call volume trend for a data set:

1. On the **Forecast** tab, click **Trend**.
2. Select a data set from the drop-down list and click **Next**.
3. If you feel the trend adequately reflects historical performance, click **Continue to Predict**. If not, click **Back to Trend** to trend another existing data set or **Acquire** to create a new historical data set. For related information, see [Create a Historical Call Volume Set](#).

Predict Call Volume

Clarity offers a choice of forecast models to estimate the number of calls for a time interval based on the trend values. The available models are:

- **Standard.** Uses Uptivity's proprietary forecasting algorithm to identify patterns and changes in call volume based on the historical data set selected.
- **Seasonal.** Uses a simple seasonal algorithm to determine future call volume based on the historical data set selected.
- **Hybrid.** Provides an average of outputs of the Standard and Seasonal models.

Multiple attempts may be necessary before a satisfactory prediction is made. Additional data may also be needed. For example, the period being predicted may include a randomly scheduled one-day sale. The historical data may have also included a similar one-day sale, but that data would have been adjusted to create a more accurate trend. For the prediction, you can return to the historical data, find the day of the sale, and use those call volumes to adjust the prediction for the upcoming one-day sale.

To predict call volume based on an existing data set:

1. On the **Forecast** tab, click **Predict**.
2. Select a historical data set from the drop-down list.
3. In the **From** field, select the first date in the forecast (typically the first day of the new schedule).
4. In the **To** field, select the date on which the call volume forecast will end.
5. From the drop-down list, select the desired prediction type (forecast model) and click **Next**.
6. Modify the data if desired.
7. To use the data for scheduling, click **Save for Bidding** to create a Bidding Schedule or **Save and Schedule** to create a standard schedule.
8. Enter a name for the forecast and click **Save**.

Modify the Predicted Call Volume Data

Clarity displays forecasted call volume data with the same look and feel as historical data, and allows you to make many of the same modifications. For specific procedures, refer to [Modify a Historical Call Volume Set](#). The following considerations apply to modifications made from the **Predict** screen:

- Modifications can only be made at the Interval level. If you attempt to **Modify selected** from a different time unit, Clarity will change the view for you.
- You can add events but the only events available will be those you created on the **Acquire** screen for this forecast. Adding an event on any level will add it to all affected levels. For example, if you add the event Spring Sale at the **Month** level, that event will also appear for every week in the **Week** level, day in the **Day** level, etc. You can clear an event from a single data column without removing it from others by right-clicking the column and selecting **Clear events from selected**.

Manage Forecast Data Sets

Several routine management tasks can be done from the **Forecast Management Interface** page.

Search Forecasts

| Forecast Name | Skills | Date Created | Creator | Start Date | End Date | Use for Reporting | Create Schedule | Actions |
|-----------------|----------|------------------------|------------|------------|-----------|-------------------|------------------|---------|
| Spring Sale | 510, 511 | 1/7/2015 1:54:08 PM | Admin User | 1/8/2015 | 2/4/2015 | Yes No | Bidding Standard | Delete |
| President's Day | 510, 511 | 1/7/2015 1:40:47 PM | Admin User | 1/8/2015 | 2/8/2015 | Yes No | Bidding Standard | Delete |
| Feb-Comm 40 | 510, 511 | 1/7/2015 11:45:17 AM | Admin User | 2/1/2015 | 2/28/2015 | Yes No | Bidding Standard | Delete |
| Product Launch | 510, 511 | 1/8/2015 11:58:46 AM | Admin User | 1/4/2015 | 2/1/2015 | Yes No | Bidding Standard | Delete |
| New Hire Class | 510, 511 | 12/29/2014 10:12:15 AM | Admin User | 12/4/2014 | 1/10/2015 | Yes No | Bidding Standard | Delete |

You can search for forecast data sets using these criteria (either alone or in combination):

- **Forecast Name**
- **Date Created**
- **Use for Reporting:** use the drop-down list to view data sets that are used for reporting, data sets that are not used for reporting, or all data sets
- **Forecast Start Date:** use the date selector in the Beginning and Ending fields to define a date range, and narrow your search to only those data sets with starting dates inside that range
- **Forecast End Date:** use the date selector in the Beginning and Ending fields to define a date range, and narrow your search to only those data sets with end dates inside that range
- **Creator:** enter values in the First Name and/or Last Name fields
- **Skills:** select one or more check boxes in the drop-down list to limit your search to data sets for the selected Skill(s)

Designate a Forecast to Use for Reporting

Because forecasting frequently involves the creation of multiple data sets for the same date range, Clarity provides you with a way to designate one forecast data set to be used for reporting. Since forecast data sets are associated with Labor Units, you can only designate one forecast data set to use for reporting per Labor Unit for a given date range. Sometimes multiple Labor Units contain the same Skills. In these cases, if you designate a forecast to be used for reporting for one Labor Unit, and you have another Labor Unit that includes some or all of the same Skills as the first Labor Unit, you will not be able to designate a forecast to be used for reporting for the second Labor Unit.

To designate a forecast data set to be used for reporting:

1. Click the **Forecast** tab and then click **Manage**.
2. Search for the desired data set.
3. In the **Use for Reporting** column, set the toggle to **Yes** for that data set.

To remove the "use for reporting" designation from a data set, follow the same procedure but set the toggle to **No**.

Create a Schedule from a Forecast

To create a schedule from a forecast on the Management Interface page:

1. Click the **Forecast** tab and then click **Manage**.
2. Search for the desired data set.
3. In the **Create Schedule** column, click either **Bidding** or **Standard**.

Continue with the normal steps for schedule creation. For more information, see [Schedule Employees](#) or [Schedule Bidding](#).

Delete a Forecast Data Set

To delete a forecast data set:

1. Click the **Forecast** tab and then click **Manage**.
2. Search for the desired data set.
3. In the **Actions** column, click **Delete** and click **Delete** again.

Schedule Employees

Note: This section deals with standard schedules. For information on creating and managing schedules on which agents can bid for desired shifts, see [Schedule Bidding](#).

There are three steps in the Clarity scheduling process:

- **Load.** Create a "schedule entry", a named combination of forecast data (if desired) and Labor Unit(s).
- **Create.** Select a schedule entry to work with, and then either generate a schedule using forecast data or create a blank schedule to complete manually.
- **Publish.** Finally, make the completed schedule available to employees and others who may need to reference it. Once a schedule has been published, it can be edited on either an individual employee basis or for multiple agents at once. For details, see [Schedule Overview](#).

The following factors should be considered in advance as they may impact any schedule you create.

- **Schedule Types.** Clarity will not allow schedules to violate labor rule settings configured on the Schedule Type, and associated Shift Templates, assigned to a given employee. For example, if the Schedule Type settings call for **Minimum hours per week** of 40, Clarity will not generate a schedule for a partial week since the 40-hour requirement could not be met. Your Clarity administrator controls these settings.
- **Pre-existing schedules.** Clarity checks to see whether employees are already scheduled and generates a warning message if they are. However, if you continue with the new schedule, Clarity does not delete any other scheduled shifts. It appends the new shifts to the existing schedule up to the number of hours allowed by the scheduling rules. If these hours are not acceptable, the other schedule must be either deleted or the hours manually edited. Making these changes before creating a schedule can make the procedure easier.
- **Labor Unit size.** Creating a schedule requires large volumes of data to be aggregated, evaluated and processed. By managing the size of the data sets involved, you can ensure more predictable and accurate results. Best practice is therefore to create Labor Units of 50 or fewer agents, and to create schedules approximately two weeks in advance. Labor Units are typically configured by your Clarity administrator.

On manually-created schedules, a warning message appears if these rules are violated. Only one rule may be listed even if multiple rules are broken.

For shifts that cross over Daylight Saving Time changes, the total number of hours scheduled for a given day changes accordingly, but is not indicated in the to/from hours of the shift. For example, a 1AM to 9AM shift crossing a change **from** DST to Standard Time displays as 01:00-09:00, but is still considered a 9-hour shift.

When a shift crosses a change **from** Daylight Saving Time to Standard Time, the extra hour will be shown in the total hours on the schedule, but during scheduling, the extra hour will not generate labor rule violation warnings. In essence, it's possible to schedule an employee for a 9-hour day and/or a 41-hour week that crosses a DST change without being warned.

Schedules can be created for days in the past.

A Labor Unit must have employees assigned to it for the scheduling process to work.

Manually Create a Schedule without a Forecast

| View Schedule | | Overtime For Period | | Time Zone: (UTC-05:00) Eastern Time (US & Canada) | | | | | Feb 16 – Feb 22, 2014 | | | | |
|---------------|------------|---------------------|------------|---|-------------|-------------|-------------|----------------|-----------------------|------|--|------------------|--|
| | | | | Today | | | | Back to Create | | Save | | Save and Publish | |
| Last name | First name | Sun Feb 16 | Mon Feb 17 | Tue Feb 18 | Wed Feb 19 | Thu Feb 20 | Fri Feb 21 | Sat Feb 22 | | | | | |
| CONTRERAS | KRISTINE | | | | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | | | | | |
| Doe | Jane | | | | 09:00-17:30 | 09:00-17:30 | 09:00-17:30 | | | | | | |
| Doe | John | | | | 09:00-17:30 | 09:00-17:30 | 09:00-17:30 | | | | | | |
| Falk | Ken | | | | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | | | | | |
| GIBBS | REGINALD | | | | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | | | | | |
| JUAREZ | ERIK | | | | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | | | | | |
| KEMP | MARI | | | | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | 10:00-18:30 | | | | | |

Schedule entries and schedules can be created manually for employees whose work does not depend on call volume forecasts, such as computer technicians and human resource specialists. Entries can be named for the Labor Units, Teams, forecasts, or any other entity that is logical for your organization. Clarity will append the current date to this name.

Hours and activities are entered on the schedule, one employee at a time, in any of the following ways:

- **Shift Templates.** Templates available for the employee's Labor Unit appear on the employee's scheduling grid. To use one, drag it to the desired starting date/time on the grid. Template activities can be changed as needed. Some Shift Templates require certain activities. In this case, click in the narrow white strip to the right of the blue time block to assign sub-blocks of time to an activity. Double-click a sub-block to change the activity.
- **Manually.** You can manually draw hours on the employee's scheduling grid by clicking individual cells in the graph, or by clicking and dragging the cursor over

multiple cells in a single day (i.e., column). You can also click the double line at the bottom of a time block and drag down to extend the block. Right-click a time block to delete it.

- **Ad Hoc Templates.** Draw hours manually, then right-click the block and select **Copy to Templates**. An entry for the shift appears under **Shift Templates**. To use this template, drag it to the calendar.

As employees are scheduled, their hours appear in the employee grid. Hours appear in 24-hour format. Non-consecutive shifts (e.g., 10 AM – Noon and then 3 PM – 5 PM) are indicated by an ellipsis (...) in the scheduled period. Manually-created schedules have two tabs: **View Schedule** and [Overtime for Period](#).

Create a New Schedule Entry

A schedule entry can be reused if mistakes are made while creating a schedule. Typically, however, you should begin with a new schedule entry. Schedule entries should not be reused for different scheduling periods. For example, if an entry is created for the current week's schedule, do not reuse that entry for next week's schedule.

1. On the **Schedule** tab, click **Load**.
2. Enter a name for the schedule entry.
3. Click **No Forecast**.
4. Select one or more **Labor Units** and click **Next**.

Create a Schedule

Note: Skip to step 2 if you are continuing from the Schedule Entry procedure.

1. Click the **Schedule** tab and then click **Create**.
2. Click **Create a blank schedule** and select a schedule entry previously created.
3. On the **View Schedule** tab, use the arrow buttons to select the desired week.
4. Double-click the desired employee's name to open a scheduling grid.
5. Use the arrow buttons and scroll bar to navigate to the desired time.
6. Enter the hours and activities.
7. Verify that no labor rules have been broken and correct as needed.
8. Click **Return** and repeat Steps 4-7 for other employees as needed.
9. Click **Save and Publish**.
10. Enter a name for the schedule.

11. Click **Save**. See [Publish a Schedule](#) for additional steps.

If you don't wish to publish the schedule at this time, just click another tab to leave the **Publish** page. You can access and publish the saved schedule for up to 7 days after its creation from the Scheduler widget on your Home tab or from the drop-down list on the Publish Schedule page.

Edit a Schedule

Employee schedules can be edited from the list by right-clicking on the cell containing the shift to be edited and selecting one of these options from the menu:

- **Generate Week.** This runs the schedule generation process explained in [Automatically Generate a Schedule Using a Forecast](#), but for only a single user. One use for this would be if the employee's schedule for the week is cleared by accident. Generate Week allows you to easily repopulated the schedule based on demand for personnel and skills for the forecasted call volume.
- **Copy day.** Copy one day. Click another day's cell and paste the copied hours.
- **Copy week:** Copy one employee's week. Click a different employee's row and paste the hours.
- **Paste:** Inserts copied day(s) or week(s).
- **Clear day:** Removes scheduled hours for the day.
- **Clear week:** Removes scheduled hours for the week.
- **Mass Shift Add:** This option allows adding a specific shift schedule to multiple employees at once. For details on using this feature, see [Mass Shift Add](#).

Automatically Generate a Schedule Using a Forecast

| View Schedule | | Overtime For Period | Over/Under Staffing | Service Level | | | | | | |
|---|------------|---------------------|---------------------|---------------|----------------------|-------------|-----------|----------------|------|------------------|
| Time Zone: (UTC-05:00) Eastern Time (US & Canada) | | | | | May 4 – May 10, 2014 | | Today | Back to Create | Save | Save and Publish |
| Last name | First name | Sun May 4 | Mon May 5 | Tue May 6 | Wed May 7 | Thu May 8 | Fri May 9 | Sat May 10 | | |
| Adaba | Isaac | | 06:30-14:30 | 05:00-13:00 | 02:30-10:30 | 01:30-09:30 | | | | |
| Amoakh | Barbara | | 08:00-16:00 | 05:30-13:30 | 02:00-10:00 | 00:00-08:00 | | | | |
| Anderson | Brad | | 15:30-23:30 | | | | | | | |
| Arroa | Ashli | 14:30-22:30 | | | | | | | | |
| Bar | Ray | | | 15:30-23:30 | | | | | | |

To help schedulers make better use of their time, the Clarity Scheduler service can generate schedules using a call volume forecast and the Schedule Type and Shift Templates associated with each employee in a Labor Unit. Because schedules are created on a per-Labor Unit basis, the following cautionary messages may appear during the process:

- If employees belong to multiple Labor Units, Clarity identifies them. Clarity cannot create schedules for the other labor units to which they belong. If this limit is a problem, you can cancel at this point.
- Employees who are already scheduled are identified in a message box. This sometimes occurs when employees are in multiple Labor Units. If adding additional hours to their schedule will create a problem, you can cancel the procedure at this point.
- The Scheduler service will not work for Labor Units without any assigned employees.

When the schedule is ready, it displays on the **View Schedule** tab. Any Labor Rule violations appear first, followed by a grid listing the employees and their hours for that schedule period. Hours appear in 24-hour format. Non-consecutive shifts (e.g., 10 AM – Noon and then 3 PM – 5 PM) are indicated by an ellipsis (...) in the scheduled period. For shifts that start on one day and end the next, both the first and the next day's shift display an ellipsis (...). This draft of the schedule is automatically saved at the time it is generated.

- Automatically-generated schedules have up to three tabs in addition to **View Schedule**: Overtime for Period, Over/Under Staffing, and Service Level.

Scheduler Process

Depending on the number of employees being scheduled, the length of the schedule time period, and other factors, Clarity may require some time to generate a schedule. If you choose to remain on the Schedule page while the Scheduler runs, Clarity keeps you informed as the Scheduler moves through its various steps. The steps typically seen in the Scheduler process are:

- **Checking Prereqs:** Clarity is verifying that the criteria you've selected are acceptable for creating a schedule.
- **Initializing:** Clarity is sending a request to launch the Scheduler service.
- **Loading:** The Scheduler is loading the data for processing.
- **Optimizing:** The Scheduler is generating a schedule based on your data.
- **Saving:** The Scheduler is saving the schedule results to the database.
- **Complete:** The Scheduler's tasks are complete.

In certain circumstances, you may also see the following messages:

- **None:** This is a default status that indicates the web interface and the Scheduler service are not communicating at the present time. You should not see this status once you start creating a schedule.
- **Stopping:** If you click **Stop Schedule Generation**, the Scheduler will finish its current Optimizing activity, save the results, and then stop. The display will toggle between Stopping and Optimizing until this is complete.
- **Error:** If an error occurs during the process, in either the web interface or the Scheduler service, an error message will display and also be entered in the Scheduler service logs.

The Scheduler service runs behind the scenes, so you are free to work on other Clarity tasks while your schedule is being created. Clarity will provide a link to your schedule in the **Scheduler** widget once it is complete. The link will display a date and time stamp so that you can easily identify different schedules.

Create a New Schedule Entry

You can reuse a schedule entry if mistakes are made while creating a schedule. Typically, however, you should begin with a new entry. Schedule entries should not be reused for different scheduling periods. For example, if you create an entry for the current week's schedule, do not reuse that entry for next week's schedule.

To create a schedule entry:

1. On the **Schedule** tab, click **Load**.
2. Enter a name for the schedule entry.
3. Select a call volume forecast data set from the list.
4. Select one or more **Labor Units** and then click **Next**.
5. If the forecast is acceptable, click **Continue to Create** to create the schedule.

Sometimes factors that affect call volumes may change after the forecast set was created. If you find the forecast set you selected is not acceptable, you can stop this procedure by clicking **Back to Load**, and generate or select a different set.

Generate a Schedule

Note: Skip to step 2 if you are continuing from the Schedule Entry procedure.

1. Click the **Schedule** tab and then click **Create**.
2. Click **Generate a schedule** and select an entry from the drop-down list.
3. Enter a schedule start date and end date. This does not have to be the same date range as the call volume forecast.
4. Check the **SMS** and/or **E-mail** boxes under **Notification Method** if you want Clarity to let you know when the schedule is ready (these contact methods must be configured in your user profile), then click **Next**.
5. Make any adjustments to the generated schedule if needed. For related information, see [View Schedule](#).
6. Click **Save and Publish**.
7. Enter a name for the schedule and click **Save**. See [Publish a Schedule](#) for additional steps.

If you don't wish to publish the schedule at this time, just click another tab to leave the **Publish** page. You can access and publish the saved schedule for up to 7 days after its creation from the **Scheduler** widget on your **Home** tab or the drop-down list on the **Publish Schedule**.

View Schedule

If you remain on the Schedule page while the Scheduler service is running, the schedule will load with **View Schedule** as the default tab view once the process is complete. **View Schedule** is also the default tab view when you click a schedule link from the Scheduler widget on your Home tab. In addition to viewing the

schedule and any Labor Rule violations (if applicable), you can also edit an individual employee's schedule from this tab.

To edit an employee's schedule from the **View Schedule** tab:

- Double-click the employee's name, make any manual adjustments, and click **Save**. For related information, see [Manually Create a Schedule without a Forecast](#).

Overtime for Period

The **Overtime for Period** tab appears with schedules that have been manually created as well as schedules that are automatically generated. This tab displays any employees currently scheduled with overtime hours. The list is sorted by Labor Unit and can be useful for making necessary scheduling adjustments. In regard to Daylight Savings Time, Clarity applies the following rules:

- When time changes **to** Daylight Saving Time, a labor rule violation is displayed and the time shifted will NOT be added as overtime.
- When time changes **from** Daylight Saving Time, no labor rule violation is displayed, and the time shifted will be added as overtime.

Over/Under Staffing

The **Over/Under Staffing** tab appears only with schedules that have been automatically generated using forecast data. With this feature, users can view either daily or weekly intervals and see whether this schedule shows them as overstaffed or understaffed, based on historical call data.

The algorithm for **Over/Under** and [Service Level](#) calculations uses simulated call volume based on historical data and a specific schedule. Clarity uses a fresh simulation for each report, so the same historical data can produce different **Over/Under** and **Service Level** results. Larger historical data sets tend to produce more accurate simulations. Using small data sets can, at times, lead to counter-intuitive results (for example, **Over/Under** and **Service Level** reports that seem contradictory).

By default, the **Over/Under** report assesses the Skills attached to the Labor Unit as a whole when determining whether a period is overstaffed or understaffed. The report can be configured to assess Skills attached to individual agents instead. For more information, consult Uptivity Clarity Support.

Depending on the size of the Labor Unit, historical data, and other factors, Over/Under reports can take some time to process. When you begin, Clarity will ask whether you'd like to be notified by email or text message once the information is

ready. You may select both notification methods, or you may select neither method. The system will use the email address and/or cell phone number in your Clarity employee record. SMS must be enabled for your account to use text notifications.

You may proceed with other activities while the report is processing. If you click away from the **Over/Under Staffing** tab and return to it before the report is complete, a pop-up will appear and give you the opportunity to cancel. You will not be able to save and publish the schedule until over/under processing is complete.

To create an Over/Under report:



1. Click the **Over/Under** tab and check one or both **Notification Methods** if desired.
2. Click **Yes**.
3. In the **Confirm** pop-up box, click **Wait**.

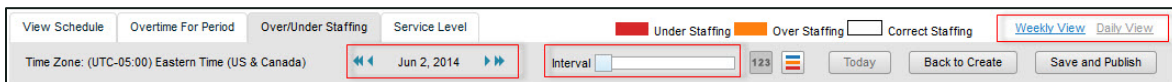
Completed Over/Under reports are accessed from your **Home** tab. Click the report link under **Completed Predictive Schedule Reports** in the **Scheduler** widget. You can add the **Scheduler** widget by clicking the **Add Widget** link on your **Home** screen.



The report link will take you directly to the **Over/Under Staffing** tab for that schedule. This tab allows you to view over/under information in a variety of ways.

| | 12:00:00 AM | 12:15:00 AM | 12:30:00 AM | 12:45:00 AM | 1:00:00 AM | 1:15:00 AM | 1:30:00 AM | 1:45:00 AM | 2:00:00 AM | 2:15:00 AM |
|--------------------------------|-------------|-------------|-------------|-------------|------------|------------|------------|------------|------------|------------|
| Cox Communications Data | | | | | | | | | | |
| S 511 OC Default VT | 3.00 | 3.00 | 4.00 | 4.00 | 5.00 | 5.00 | 6.00 | 6.00 | 7.53 | 7.80 |
| S 510 OC Default HSI | 3.58 | 2.74 | 3.10 | 3.79 | 5.63 | 4.38 | 5.32 | 5.51 | 7.50 | 6.10 |
| Cox Comm 40 agents | | | | | | | | | | |
| S 510 OC Default HSI | 3.58 | 2.74 | 3.10 | 3.79 | 5.63 | 4.38 | 5.32 | 5.51 | 7.50 | 6.10 |
| S 511 OC Default VT | 3.00 | 3.00 | 4.00 | 4.00 | 5.00 | 5.00 | 6.00 | 6.00 | 7.53 | 7.80 |

- Data is grouped by Labor Unit and within Labor Unit, by Skill. This allows you to more easily determine the agents and schedules to change in order to positively impact over or under staffing.
- Information is color coded. Red indicates periods that are understaffed. Orange indicates periods that are overstaffed.

- The default information view shows over/under information in a numerical format based on fulltime equivalents (FTEs). For example, the screen above shows that at 12:00:00 AM, the "S 511 OC Default VT" skill is overstaffed by 3.00 FTEs.
- To change to a graphic view which simply shows colored "over" or "under" staffing bars, click the  icon. To return to the numerical format, click the  icon.



- The default view is a Daily View of the first day in your schedule. Scheduling is shown in increments of 15 minutes.
- To change the increments of time within the view, use the **Interval** slider. You can adjust your view to 30, 45 or 60 minute increments.
- To move forward or backward in the time increments for that day, click the  or  icons at either end of the blocks of time. To view other days in the schedule, use the date selector.
- To see over/under information for the week, click **Weekly View**.

The **Over/Under Staffing** tab allows you to easily see time periods where you may want to adjust your schedule to help ensure optimal, cost-effective coverage. You can move back and forth between your schedule and the over/under information by clicking the **View Schedule** and **Over/Under Staffing** tabs. However, to see the results of your adjustments, you will need to save the changes to the schedule and then rerun the Over/Under report. Saving a modified schedule will discard any reports previously generated for that schedule.

Note: If you forget to save changes to your schedule and you click the **Over/Under Staffing** tab, a warning message will appear at the top of the page to remind you that the over/under information does not reflect your changes.

Service Level

The **Service Level** tab appears only with schedules that have been automatically generated using forecast data. With this feature, you can view either daily or weekly intervals and see projections as to whether, based on this schedule, you will be able to meet the service level defined for a specific skill. Service Levels are configured by your Clarity administrator.

Depending on the size of the Labor Unit, historical data, and other factors, Service Level reports can take some time to process. When you begin, Clarity will ask whether you'd like to be notified by email or text message once the information is

ready. You may select both notification methods, or you may select neither method. The system will use the email address and/or cell phone number in your Clarity employee record. SMS must be enabled for your account to use text notifications.

You may proceed with other activities while the report is processing. If you click away from the **Service Level** tab and return to it before the report is complete, a pop-up will appear and give you the opportunity to cancel. You will not be able to save and publish the schedule until service level processing is complete.

To create a Service Level report:



1. Click the **Service Level** tab and check one or both **Notification Methods** if desired.
2. Click **Yes**.
3. In the **Confirm** pop-up box, click **Wait**.

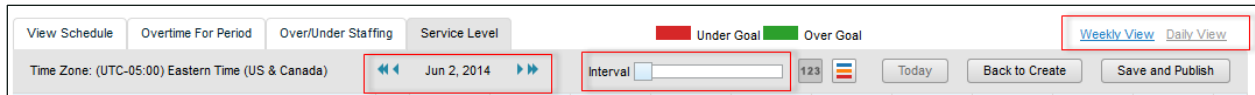
Completed Service Level reports are accessed from your **Home** tab. The report link will appear under **Completed Predictive Schedule Reports** in the **Scheduler** widget. You can add the **Scheduler** widget by clicking the **Add Widget** link on your **Home** screen.

The report link will take you directly to the **Service Level** tab for that schedule. This tab allows you to view the service level information in a variety of ways.

The screenshot shows a software interface for viewing Service Level reports. At the top, there are tabs for 'View Schedule', 'Overtime For Period', 'Over/Under Staffing', and 'Service Level'. A legend indicates 'Under Goal' in red and 'Over Goal' in green. The interface includes a 'Time Zone' dropdown set to '(UTC-05:00) Eastern Time (US & Canada)', a date selector for 'Jun 2, 2014', an 'Interval' input field, and buttons for 'Today', 'Back to Create', and 'Save and Publish'. Below this is a table titled 'Cox Communications Data' with columns for time intervals from 12:00:00 AM to 2:15:00 AM. Two rows of data are shown: 'S 511 OC Default VT' and 'S 510 OC Default HSI'. The first row shows 100.00% for all intervals. The second row shows 80.56%, 44.44%, 90.00%, 88.33%, 95.56%, 91.49%, 98.00%, 98.00%, 98.04%, and 98.04% for the respective intervals.

| | 12:00:00 AM | 12:15:00 AM | 12:30:00 AM | 12:45:00 AM | 1:00:00 AM | 1:15:00 AM | 1:30:00 AM | 1:45:00 AM | 2:00:00 AM | 2:15:00 AM |
|----------------------|-------------|-------------|-------------|-------------|------------|------------|------------|------------|------------|------------|
| S 511 OC Default VT | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |
| S 510 OC Default HSI | 80.56% | 44.44% | 90.00% | 88.33% | 95.56% | 91.49% | 98.00% | 98.00% | 98.04% | 98.04% |

- Data is grouped by Skill.
- Information is color coded. Green indicates periods in which you are predicted to meet the defined Service Level, and red indicates periods in which you are not.
- The default view shows Service Level information in a numerical format, as a percentage of how often you are predicted to achieve the established Service Level. For example, the screen above shows that at 12:00 AM, skill "S 511 OC Default VT" is predicted to be at or above established Service Level 100% of the time. However, skill "S 510 OC Default HSI" is predicted to be at or above established Service Level only 80.56% of the time.
- To change to a graphic view which simply shows colored "under goal" or "over goal" staffing bars, click the  icon. To return to the numerical format, click the  icon.



- The default view is a Daily View of the first day in your schedule. Scheduling is shown in increments of 15 minutes.
- To change the increments of time within the view, use the **Interval** slider. You can adjust your view to 30, 45 or 60 minute increments.
- To move forward or backward in the time increments for a day, click the ◀ or ▶ icons at either end of the blocks of time. To view other days, use the date selector.
- To see Service Level information for the week, click **Weekly View**.

The **Service Level** tab allows you to easily see time periods where you may want to adjust your schedule to help ensure optimal, cost-effective coverage. You can move back and forth between your schedule and the Service Level information by clicking the **View Schedule** and **Service Level** tabs. However, to see the results of your adjustments, you will need to save the changes to the schedule and then rerun the Service Level report. Saving a modified schedule will discard any reports previously generated for that schedule.

Note: If you forget to save changes to your schedule and you click the **Service Level** tab, a warning message will appear at the top of the page to remind you that the service level information does not reflect your changes.

Publish a Schedule

Employees cannot see schedule information until it is published. You can access and publish saved schedules from the **Scheduler** widget on your **Home** tab or the drop-down list on the **Publish Schedule** page for up to 7 days after you create them. Clarity offers a choice of methods for notifying employees that a new schedule has been published (messages associated with these methods are not user-configurable):

- **Email:** Users must have an email address specified on their Clarity account. The email message will have the title: "You have been scheduled in Clarity." The message body will list the scheduled shift times.
- **Twitter:** Your Clarity administrator must set up and configure a Twitter site for use with Clarity. The tweet will be "Schedule published!"
- **Facebook:** Your Clarity administrator must set up and configure a Facebook site for use with Clarity. The posting will be "Schedule published!"
- **SMS:** Users must have text-message capable mobile phones. Their mobile phone information must be entered in their Clarity accounts, and the "Enable SMS" check box must be selected. The SMS message will be "You have been scheduled in Clarity."

You can send additional notifications of schedule publication after the initial notification has been sent by repeating this procedure. Any notification option can be selected. Subsequent notifications do not affect the published schedule.

To publish a schedule:

1. On your **Home** tab, click the link to your desired schedule in the **Scheduler** widget.
2. Click **Save and Publish**.
3. Rename the schedule if desired.
4. Select the schedule from the dropdown list.
5. Select a notification method if desired and click **Publish**.

Undo Publish Schedule

You can undo a published schedule for up to seven days after you create. To modify a schedule that has been published for seven days or longer, you will need to edit the schedule manually (see [Edit a Schedule](#)).

To remove a published schedule:

1. Click the **Schedule** tab.
2. Click **Publish**.
3. Select the schedule from the dropdown list.
4. Select a notification method if desired and click **Undo Publish Schedule**.

When a published schedule is removed, all shifts that were created by the schedule will also be removed. If a shift has been modified after the schedule was published, that shift will not be deleted when the schedule is removed. The system will ask for confirmation, and when the process is complete, a dialog will appear to notify you the task completed successfully.

Export a Schedule

Schedules can be exported in CSV format if needed. To export a schedule:

1. On your **Home** tab, click the link to your desired schedule in the **Scheduler** widget.
2. Click **Publish**.
3. Select the schedule from the drop down list and clear the publication options.
4. Click **Export**.
5. Save the file to the local computer.

Schedule Bidding

Note: This section is for workforce and application administrators who are implementing the Schedule Bidding feature in their Clarity system. Agents who want to bid on schedules should refer to [Bid for Schedules](#).

The Schedule Bidding feature adds flexibility and functionality to Clarity's scheduling system in a number of ways. Key facts about Schedule Bidding include:

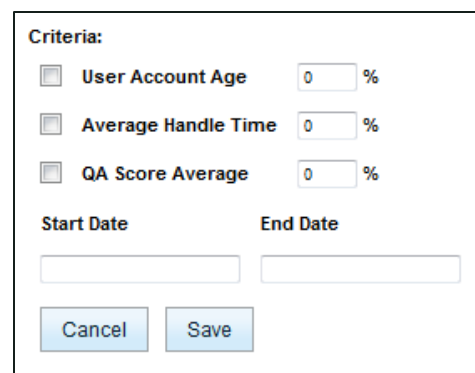
- Schedule Bidding can support both manually-created and automatically-generated schedules.
- Agents can bid on a set of shifts they prefer rather than simply being assigned a schedule.
- To assist users in awarding schedules, Clarity provides a means for ranking agents. Workforce administrators can use Clarity criteria to award schedules to bidding agents, and these criteria can be modified as business needs change. Alternatively, administrators can import agent ranks that have been pre-determined based on business rules external to Clarity.
- Workforce administrators control the period of time during which schedules are available for bidding.
- Through Clarity permissions, application administrators can control which employees are able manage Schedule Bidding, and which agents are allowed to bid on schedules.

Clarity Agent Ranking Criteria

Clarity lets you specify sets of criteria that can be used to rank agents and make it easier to award bidding schedules appropriately. Criteria sets are applied to Labor Units. The same criteria set can be applied to multiple Labor Units, and one Labor Unit can have multiple associated criteria sets. Available criteria are:

- **User Account Age:** Since agent hire dates are not stored in Clarity, this field is used as an indicator of agent tenure or seniority.

Note: User Account Age will not consistently mirror agent tenure for a number of reasons: agents may be rehired and/or their Clarity accounts reinstated; agents may have been hired prior to Clarity implementation, etc.



The screenshot shows a configuration window titled "Criteria:". It contains three checkboxes, each followed by a text input field and a percentage sign: "User Account Age" (input: 0), "Average Handle Time" (input: 0), and "QA Score Average" (input: 0). Below these are two text input fields labeled "Start Date" and "End Date". At the bottom are two buttons: "Cancel" and "Save".

- **Average Handle Time (AHT):** This field can be used when Clarity is integrated to a PBX that provides this statistic.
- **QA Score Average:** This field can only be used with hybrid Discover/Clarity systems in which Discover Quality Management is used to evaluate agents.

In addition to selecting criteria to be used, you can also determine the period from which criteria will be determined and the weight percentage associated with each criteria item. The total weight for all selected criteria must equal 100%.

For best results, criteria should be applied to Labor Units where the data is available for all agents. If none of the agents in a Labor Unit have data for the selected criteria, Clarity will display a message stating, "The selected agent ranking criteria set contains no data. No ranks will be applied."

There are some scenarios in which criteria data may be present for some, but not all, agents in the Labor Unit:

- You create a set of criteria basing agent ranking on AHT and QA Score Average, and apply it to a Labor Unit.
- Some agents in the Labor Unit do not have QA scores during the criteria period (perhaps they are new).
- When you apply the criteria as part of the award process, Clarity will display a message warning that data was not present for all agents and that agents without data were not ranked.

Create Agent Ranking Criteria

Please select an option:
 Manage Agent Ranking Criteria

Agent Ranking Criteria New Criteria Set

| Name | |
|-------------|---|
| Tech Set | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| Billing Set | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| Admin Set | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

To create a set of criteria for agent ranking:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Agent Ranking Criteria** from the drop-down list of options.
3. Click **New Criteria Set**.
4. Enter a meaningful **Name** for the criteria set so you can easily identify it.
5. In the left column under **Labor Units**, select the unit(s) you want to associate with this set of criteria and move them to the right column.

6. Check the **Criteria** you wish to use and assign weights if desired.
7. Enter the **Start Date** and **End Date** for the criteria period and then click **Save**.

Edit or Delete Agent Ranking Criteria

To edit or delete an existing set of criteria for agent ranking:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Agent Ranking Criteria** from the drop-down list of options.
3. Click **Edit** next to the desired criteria set.
4. Edit the criteria selections as needed and click **Save**.

To delete a criteria set, follow this procedure but click **Delete** next to the desired set instead of Edit. The set is permanently deleted after you click **OK** in the warning message dialog box.

Imported Agent Ranks

If you prefer to use your own agent ranking criteria instead of those built into Clarity, you can import agent ranks. You will first need to create a CSV file in the following format: alphanumeric employee ID, integer rank. For example, if agent John Smith's employee ID number is 12345 and he has a rank of 5, his entry in the CSV file would be "12345,5". The file must begin with this row header: Employee_id,rank. If you use Microsoft Excel to create the file, it should look something like this:

| | A | B |
|---|-------------|------|
| 1 | Employee_id | rank |
| 2 | 5009 | 1 |
| 3 | 5707 | 2 |
| 4 | 5709 | 3 |

How you assign ranks to agents is up to you; Clarity simply uses the file to assign the designated rank to the agent. Each agent's rank must be unique; in other words, you cannot have two agents with a rank of 2. You also need to make sure the Employee ID field in Clarity is completed for each employee in the file. If Clarity cannot match an employee in your file to a Clarity user, it will not import that row. Clarity will preview the file for you, along with any warning or error messages, so you can correct any issues prior to the actual import.

| Row | Employee Name | Employee ID | Employee Rank |
|-----|----------------|-------------|---------------|
| 2 | Sheryl Coscia | 5009 | 1 |
| 3 | Kevin Dimetrik | 5707 | 2 |
| 4 | Neil Bern | 5709 | 3 |
| 5 | Zach Hattli | 5998 | 4 |
| 6 | Henry Fearnley | 7507 | 5 |
| 7 | | 67890 | 6 |

Imported agent ranks appear on the **Manage Agent Ranking Criteria** screen along with any criteria sets you may have created in Clarity. Imported ranks are clearly identified as such. You cannot edit imported agent ranks in Clarity. To change rankings, you must modify the CSV file and import it again. To remove a set of imported agent ranks, follow the Delete steps in [Edit or Delete Agent Ranking Criteria](#).

Import Agent Ranks

To import a CSV file of agent ranking criteria:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Agent Ranking Criteria** from the drop-down list of options.
3. Click **Import Agent Ranks**.
4. Enter a meaningful **Name** for the criteria set so you can easily identify it.
5. Click **Browse**, navigate to the desired CSV file and click **Open**.
6. Click **Upload**, verify the preview is acceptable (correcting any error or warning messages if applicable), and then click **Import**.

Bidding Schedules

There are five steps in the Clarity process for Bidding Schedules:

- **Load.** Create a "schedule entry", a named combination of forecast data (if desired) and Labor Unit(s).
- **Create.** Select a schedule entry to work with, and then either generate a bidding schedule using forecast data or create a blank bidding schedule to complete manually.
- **Initiate.** Make the bidding schedule available to employees to bid on their preferred shifts.
- **Award.** Based on employee bids and Agent Ranking Criteria (if desired), award shifts in the Bidding Schedule.
- **Publish.** Finally, make the awarded bidding schedule available to employees and others who may need to reference it.

Consider the following factors that may impact your Bidding Schedules.

- **Schedule Types.** Clarity will not allow schedules to violate labor rule settings configured on the Schedule Type, and associated Shift Templates, assigned to a Labor Unit. For example, if Schedule Type settings call for **Minimum hours per week** of 40, Clarity will not generate a schedule for a partial week since the 40-hour requirement could not be met. On manually-created schedules, a warning message appears if these rules are violated. Only one rule may be listed even if multiple rules are broken. Your Clarity administrator controls these settings.
- **Labor Unit size.** Creating a schedule requires large volumes of data to be aggregated, evaluated and processed. By managing the size of the data sets involved, you can ensure more predictable and accurate results. Best practice is therefore to create Labor Units of 50 or fewer agents, and to create schedules approximately two weeks in advance. Labor Units are typically configured by your Clarity administrator.
- **Daylight Savings Time (DST).** When shifts cross over DST changes, the total number of hours scheduled for a given day changes accordingly, but is not indicated in the "to/from" hours of the shift. Example: a 1AM to 9AM shift crossing **from** DST to Standard Time displays as 01:00-09:00, but is still a 9-hour shift. When shifts cross **from** DST to Standard Time, the extra hour shows in total hours on the schedule but will not generate labor rule violation warnings. Thus, you can schedule an employee for a 9-hour day and/or a 41-hour week that includes a change from DST to Standard Time, and not be warned.
- Schedules can be created for days in the past.

Manually-Created Bidding Schedules

Bidding Schedules can be created manually for employees whose work does not depend on call volume forecasts, such as computer technicians and human resource specialists. Schedules can be named for the Labor Units, Teams, forecasts, or any other entity that is logical for your organization.

To create a Bidding Schedule manually, you will first create a schedule entry, and then use that entry to create a blank scheduling grid for your schedule. You can fill in the grid by clicking individual cells in the graph, or by clicking and dragging the cursor over multiple cells in a single day (i.e., column). Click the double line at the bottom of a time block and drag down to extend the block, or right-click a time block to delete it.

You can add activities from your existing Shift Activity Types (lunch, break, etc.) to a shift. Click in the narrow white strip to the right of the blue time block to assign sub-blocks of time to an activity. Double-click a sub-block to change the activity.

Bidding Schedules must include the same number of schedule choices as there are agents in the Labor Unit. Therefore, the blank scheduling grid will display with one line for each agent in the Labor Unit. You will not be allowed to save the Bidding Schedule unless there is at least one shift on each line. The sample Bidding Schedule shown here is for a Labor Unit with 12 agents.

| View Schedule | | | | | | |
|---|-------------|-------------|-------------|-------------|-------------|-------------|
| Time Zone: (UTC-05:00) Eastern Time (US & Canada) | | | | | | |
| Apr 20 – Apr 26, 2014 | | | | | | |
| Sun Apr 20 | Mon Apr 21 | Tue Apr 22 | Wed Apr 23 | Thu Apr 24 | Fri Apr 25 | Sat Apr 26 |
| 08:00-18:00 | | 08:00-18:00 | | 08:00-18:00 | | 08:00-18:00 |
| 08:00-18:00 | | 08:00-18:00 | | 08:00-18:00 | | 08:00-18:00 |
| | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | |
| | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | |
| | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | 07:00-15:00 | |
| | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | |
| | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | |
| | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | 08:00-16:00 | |
| | 09:00-17:00 | 09:00-17:00 | 09:00-17:00 | 09:00-17:00 | 09:00-17:00 | |
| | 09:00-17:00 | 09:00-17:00 | 09:00-17:00 | 09:00-17:00 | 09:00-17:00 | |
| | 10:00-18:00 | 10:00-18:00 | 10:00-18:00 | 10:00-18:00 | 10:00-18:00 | |
| | 10:00-18:00 | 10:00-18:00 | 10:00-18:00 | 10:00-18:00 | 10:00-18:00 | |

Saved Bidding Schedules that have been manually generated can be accessed directly from the Manage Bidding Schedules page.

Manually Create a Bidding Schedule

Note: A schedule entry can be reused if mistakes are made while creating a schedule. Typically, however, you should begin with a new schedule entry. Schedule entries should not be reused for different scheduling periods. For example, if an entry is created for the current week's schedule, do not reuse that entry for next week's schedule.

To create a schedule entry for a manually-created Bidding Schedule:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Bidding Schedules** from the drop-down list of options.
3. Click **Create a Bidding Schedule**.
4. Enter a meaningful **Name** for the Schedule Entry.
5. Click **No Forecast**.
6. Select the **Labor Unit(s)** for this schedule and click **Next**.

To manually create a Bidding Schedule (skip to step 4 if you are continuing from the Schedule Entry procedure):

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Bidding Schedules** from the drop-down list and then click **Create a Bidding Schedule**.
3. Click **Create**.
4. Click **Create a blank schedule** and select a schedule entry previously created.
5. Draw the desired schedule in the blank scheduling grid.
6. Click **Save** or **Save and Initiate**.

Note Click **Save and Initiate** if you want to continue with the next step in the Schedule Bidding process; see [Initiate a Bidding Period](#). If you don't wish to initiate the Bidding Period at this time, just click another tab to leave the **View Schedule** page after clicking **Save**.

Automatically-Generated Bidding Schedules

Note: Automatically-generated Bidding Schedules use Clarity's forecasting and trending functionality as well as the Clarity Scheduling Service. Refer to [Forecast Call Volumes](#) and [Scheduler Process](#) for more information.

Clarity supports automatic generation of Bidding Schedules using a call volume forecast and the Schedule Type and Shift Templates associated with each employee in a Labor Unit. Because schedules are created on a per-Labor Unit basis, the following cautionary message may appear during the process:

- If employees belong to multiple Labor Units, Clarity identifies them. Clarity cannot create schedules for the other labor units to which they belong. If this limit is a problem, click **Cancel**. Otherwise, click **OK** to continue.

There are two steps required to automatically generate a Bidding Schedule: creating a schedule entry and generating the schedule. When the schedule is ready, it displays on the **View Schedule** tab as pictured below. Hours appear in 24-hour format. Non-consecutive shifts (e.g., 10 AM – Noon and then 3 PM – 5 PM) are indicated by an ellipsis (...) in the scheduled period. For shifts that start on one day and end the next, both the first and the next day's shift display an ellipsis (...). This draft of the schedule is automatically saved at the time it is generated.

| Sun Jun 1 | Mon Jun 2 | Tue Jun 3 | Wed Jun 4 | Thu Jun 5 | Fri Jun 6 | Sat Jun 7 |
|-----------|-------------|-------------|-------------|-------------|-------------|-----------|
| | 08:30-17:00 | 08:30-17:00 | 08:30-17:00 | 08:30-17:00 | 08:30-17:00 | |
| | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | |
| | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | |
| | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | |
| | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | |
| | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | |
| | 09:30-18:00 | 09:30-18:00 | 09:30-18:00 | 09:30-18:00 | 09:30-18:00 | |
| | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | 12:00-20:30 | |
| | 10:30-19:00 | 10:30-19:00 | 10:30-19:00 | 10:30-19:00 | 10:30-19:00 | |

Saved Bidding Schedules that have been auto-generated can be accessed directly from the Manage Bidding Schedules page. Bidding Schedules for which the Bidding Period has not yet been initiated can also be accessed by clicking the link in the Scheduler widget. The links in the widget display as either Scheduler Report or Bidding Schedule, along with the date and time of the schedule's creation; names of saved schedules do **not** display.

Generate a Bidding Schedule Automatically

A schedule entry can be reused if mistakes are made while creating a schedule. Typically, however, you should begin with a new schedule entry. Schedule entries should not be reused for different scheduling periods. For example, if an entry is created for the current week's schedule, do not reuse that entry for next week's schedule.

To create a schedule entry for an automatically-generated Bidding Schedule:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Bidding Schedules** from the drop-down list of options.
3. Click **Create a Bidding Schedule**.
4. Enter a meaningful **Name** for the Schedule Entry.
5. Click **Select Forecast** and choose the desired forecast from the drop-down list.
6. Select the **Labor Unit(s)** for this schedule and click **Next**.
7. If the forecast is acceptable, click **Continue to Create** to create the schedule.

Sometimes factors that affect call volumes change after the forecast set was created. If you find the forecast set you selected is not acceptable, this procedure can be stopped by clicking **Back to Load**. You can then generate or select a different forecast volume set.

To automatically generate a Bidding Schedule (skip to step 4 if you are continuing from the Schedule Entry procedure):

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Bidding Schedules** from the drop-down list and then click **Create a Bidding Schedule**.
3. Click **Generate a Bidding Schedule**.
4. Select a schedule entry from the drop-down list.
5. Enter a schedule start date and end date. This does not have to be the same date range as the call volume forecast.
6. Check the **SMS** and/or **E-mail** boxes under **Notification Method** if you want Clarity to let you know when the schedule is ready (these contact methods must be configured in your user profile), then click **Next**.
7. Make adjustments to the generated schedule if needed by double-clicking a shift.
8. Click **Save** or **Save and Initiate**.

Note Click **Save and Initiate** if you want to continue with the next step in the Schedule Bidding process; see [Initiate a Bidding Period](#). If you do not wish to initiate the Bidding Period at this time, simply click another tab to leave the **View Schedule** page after clicking **Save**.

Edit a Bidding Schedule

Bidding Schedules can be edited as long as the associated Bidding Period has not been initiated. To edit a Bidding Schedule:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Bidding Schedules** from the drop-down list of options.
3. Click **Edit** next to the desired schedule.
4. Edit the schedule as needed.
5. Click **Save** or **Save and Initiate**.

Note: Click **Save and Initiate** if you want to continue with the next step in the Schedule Bidding process; see [Initiate a Bidding Period](#). If you don't wish to initiate the Bidding Period at this time, just click another tab to leave the **View Schedule** page after clicking **Save**.

Delete a Bidding Schedule

Bidding Schedules can be deleted as long as the associated Bidding Period has not been initiated. To delete a Bidding Schedule:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Bidding Schedules** from the drop-down list of options.
3. Click **Delete** next to the desired schedule.

Award a Bidding Schedule

Once the Bidding Period for a schedule has ended, you will need to award the shifts on the Bidding Schedule to the agents. The Award Bidding Schedules page allows you to view each agent in the Labor Unit and see which shifts they have selected. You can also apply Agent Ranking Criteria to the list of agents, and consider their rankings when awarding the shifts.

Please select an option:
Award Bidding Schedules

Award Bidding Schedules Hide Awarded Save Publish

Bid Schedule: Morganville April View Criteria Set: Morganville Basic Apply

| Name | Location | Rank | |
|------------------|------------------------|------|--------|
| Jim Smith | Morganville Bay Center | 1 | Select |
| Amelia Danvers | Morganville Bay Center | 2 | Select |
| Shane Jones | Morganville Bay Center | 3 | Select |
| Clara Rosser | Morganville Bay Center | 4 | Select |
| Eve Thompson | Morganville Bay Center | 5 | Select |
| Leslie Glass | Morganville Bay Center | 6 | Select |
| Dennis Goldhart | Morganville Bay Center | 7 | Select |
| Jessica Hamilton | Morganville Bay Center | 8 | Select |

Select an agent to review bids and award a schedule.

When you select an agent, the shifts in the Bidding Schedule will display on the right, along with an indication as to whether the agent bid on each shift. If the Bidding Schedule includes multiple weeks, you can scroll from week to week. Once you have awarded a shift, **Award** will be replaced with text stating to whom the shift was awarded. The awarded shift will also appear grayed out when you select another agent. You can choose to remove awarded shifts from the display by clicking **Hide Awarded**.

To award a Bidding Schedule:

1. Click the **Schedule** tab and then click **Bidding**.
2. Click **Award** next to the desired schedule.
3. Select a **Criteria Set** from the drop-down list (if desired) and click **Apply**.
4. Click **Award** next to a desired shift to award it to that agent.
5. Click **Select** next to another agent to continue awarding shifts.
6. When all shifts have been awarded, click **Save**.

Undo a Bidding Schedule Award

You can undo awards as long as a Bidding Schedule has not been published. To undo a Bidding Schedule award:

1. Click the **Schedule** tab and then click **Bidding**.
2. Click **Award** next to the desired schedule.
3. Click **Select** next to the agent(s) whose shift(s) you wish to change.
4. Click **Undo Award**.
5. Click **Save**.

Publish Bidding Schedule Awards

Publishing is the final step in the Schedule Bidding process, and makes the awarded Bidding Schedule available to employees and others who may need to reference it. Schedules must be published within seven (7) days after you click **Publish** on the Award Bidding Schedules page. Once a schedule has been published, you can no longer undo awards. However, the schedule can be edited on either an individual employee basis or for multiple agents at once. For details, see [Schedule Overview](#).

Clarity will allow you to publish a schedule even if you have not awarded all the shifts in that schedule. A warning message will appear if this circumstance exists. If you choose to publish anyway, only the shifts you awarded will be in the published schedule.

If you attempt to publish a schedule and have not awarded *any* shifts, Clarity will take you to the Publish Schedule page but your schedule will not be available in the drop-down list of schedules. Clarity will also warn you if the schedule results in any Labor Rule violations, and give you the opportunity to override the rules if desired.

For more information on methods for notifying agents that the Bidding Schedule has been published, see [Publish a Schedule](#).

To publish Bidding Schedule awards:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Award Bidding Schedules** from the drop-down list.
3. Select the desired **Bidding Schedule** from the drop-down list and click **View**.
4. Click **Select** next to any agent to load the awarded shifts.
5. Click **Publish**.
6. Click **Proceed**.

7. Select the desired schedule from the drop-down list.
8. Select the check box for one or more notification method(s) if desired and then click **Publish**.
9. Click **Override** if applicable and then click **OK**.

Undo Publishing a Bidding Schedule Award

Follow the same procedure for undoing publication of Bidding Schedules and standard schedules. For details, see [Undo Publish Schedule](#).

Bidding Periods

For each Bidding Schedule, you define the period of time during which agents can bid for their desired shifts. Bidding Periods can be initiated when you create a Bidding Schedule, or you can initiate the period later by returning to a saved Bidding Schedule. Bidding Periods end at 11:59:59pm on your chosen End Date.

When you initiate the Bidding Period, you can also choose how agents will be notified that a Bidding Schedule is available. Notification options include:

- **Email:** Agents must have an email address configured in their profile.
- **SMS:** Agents must have a cell phone and carrier configured in their profile and SMS must be enabled. The phone must be capable of receiving text messages.
- **Twitter:** The Twitter feed integration must be configured by your Clarity administrator.
- **Facebook:** The Facebook feed integration must be configured by your Clarity administrator.

Initiate a Bidding Period

To initiate a Bidding Period:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Bidding Schedules** from the drop-down list.
3. Click **Initiate** next to the desired schedule.
4. Enter the **Start Date** and **End Date** for the Bidding Period.
5. Select the check box for one or more **Notification Options** and then click **Initiate**.

Manually Close a Bidding Period

In certain circumstances, you may need to close a Bidding Period before the end date you defined. When you enter the current date (e.g. today) as the new End Date, the Bidding Period ends immediately. To manually close a Bidding Period:

1. Click the **Schedule** tab and then click **Bidding**.
2. Select **Manage Bidding Schedules** from the drop-down list.
3. Click **Close Bidding** next to the desired schedule.
4. Enter the new **End Date** for the Bidding Period.
5. Select the check box for one or more **Notification Options** and then click **Close**.

Document Revision History

| Revision | Change Description | Effective Date |
|----------|---|----------------|
| 0 | Initial release for this version | 2015-02-13 |
| 1 | Revise "Undo Publish Schedule" to reflect 7-day limit | 2015-03-17 |