



inContact WFM v1 User Manual, 16.1

www.incontact.com

Cloud

inContact WFM v1 User Manual, 16.1

- **Version** — 16.1
- **Revision** — March 2016
- **About inContact** — inContact (NASDAQ: [SAAS](#)) is leader in cloud contact center software, helping organizations around the globe create customer and contact center employee experiences that are more personalized, more empowering and more engaging today, tomorrow and in the future. inContact focuses on continuous innovation and is the only provider to offer core contact center infrastructure, workforce optimization plus an enterprise-class telecommunications network for the most complete customer journey management. inContact offers customers a choice of deployment options. To learn more, visit www.inContact.com.
- **Copyright** — ©2016 inContact, Inc.
- **Disclaimer** — inContact reserves the right to update or append this document, as needed.
- **Contact** — Send suggestions or corrections regarding this guide to documentationsrequest-discover@incontact.com.

Table of Contents

| | |
|---|-----------|
| Introduction | 10 |
| Audience..... | 10 |
| Goals..... | 10 |
| Assumptions..... | 10 |
| Need-to-Knows | 10 |
| inContact WFM v1 Terminology | 11 |
| What's New in this Version..... | 12 |
| Managing Your inContact WFM v1 | 13 |
| Login | 13 |
| Forgot Password Feature | 14 |
| Change Your Password | 14 |
| Log Out | 15 |
| Update Viewing Time Zone | 15 |
| Update Your Employee Information | 15 |
| Home Tab Widgets Overview | 15 |
| Dashboard Widget | 16 |
| Facebook/Twitter Widgets..... | 16 |
| Forecasts Widget..... | 16 |
| News Widget | 17 |
| Scheduler Widget..... | 17 |
| Add or Remove a Widget | 18 |
| View Schedules | 18 |

| | |
|---|-----------|
| Leave Requests Overview | 19 |
| Request Leave | 21 |
| Shift Swaps Overview | 21 |
| Request a Shift Swap..... | 22 |
| View Your Leave Requests and History | 23 |
| Bid for Schedules | 24 |
| Managing Employees | 25 |
| Supervisors Overview | 25 |
| Searches and Filters Overview..... | 26 |
| Create a Search Filter | 27 |
| Edit Employee Information | 27 |
| View Employee Schedules | 28 |
| Edit Employee Schedules | 28 |
| View Employee Leave Requests and History | 29 |
| Manage Employee Shift Swap Requests..... | 29 |
| Employee Leave Requests Overview..... | 30 |
| Respond to Individual Employee Leave Requests..... | 31 |
| Respond to Multiple Employee Leave Requests..... | 32 |
| Reporting on Employee and Call Activity..... | 33 |
| Real-Time Roster Overview | 33 |
| Perform Real-Time Roster Actions | 34 |
| Monitor Agents in Real Time (Live Monitor)..... | 35 |
| Real-Time Roster Filter Reference..... | 37 |

| | |
|--|----|
| Schedule Overview Basics | 37 |
| Daily Reports | 38 |
| Weekly Reports | 38 |
| View Employee Schedules in the Schedule Overview | 39 |
| Edit Shifts in the Schedule Overview | 40 |
| Add an Event to Multiple Employee Schedules..... | 41 |
| Add a Shift to Multiple Employee Schedules | 41 |
| Schedule Adherence Overview | 41 |
| Daily Adherence | 42 |
| Weekly Adherence | 43 |
| Real-Time Reports Overview | 44 |
| Call Status and Staffed Snapshot..... | 44 |
| Service Level Snapshot..... | 45 |
| Live Labor Snapshot..... | 45 |
| Forecasted Calls vs. Actual Calls | 46 |
| Live Project Snapshot | 46 |
| Historical Reports Overview..... | 47 |
| Forecasted Calls vs. Actual Calls | 47 |
| Actual Calls vs. Service Level | 48 |
| Add or Remove a Report Widget..... | 48 |
| Ad Hoc Reports Overview..... | 49 |
| Ad Hoc Report Builder | 49 |
| Ad Hoc Report Fields and Criteria | 50 |
| Chart Types in Ad Hoc Reports | 50 |

| | |
|--|-----------|
| Report Structure | 51 |
| Ad Hoc Report List..... | 55 |
| Create an Ad Hoc Report | 55 |
| Save Ad Hoc Report Criteria..... | 56 |
| Edit Existing Ad Hoc Reports | 57 |
| Generate an Ad Hoc Report..... | 58 |
| Publish an Ad Hoc Report | 59 |
| Ad Hoc Reporting Fields Reference | 59 |
| ACD Call and Agent Data..... | 59 |
| Agent Leave and PTO | 62 |
| Shifts..... | 63 |
| Using Report Tools | 64 |
| Report Subscriptions Overview | 64 |
| Subscription Delivery Methods | 65 |
| Load the Report Subscriptions Page | 65 |
| Create a Report Subscription..... | 65 |
| Set Email Delivery Options..... | 66 |
| Set Schedule Options | 66 |
| Manage Report Subscriptions | 67 |
| Shared Schedules Overview | 68 |
| Load the Shared Schedules Page..... | 68 |
| Create a New Shared Schedule..... | 68 |
| Manage Shared Schedules | 68 |

Forecasting Call Volumes 70

| | |
|--|----|
| Forecasting Overview | 70 |
| Forecast Service..... | 71 |
| Import Data from a File..... | 72 |
| Create a Historical Call Volume Set Using Device Data | 73 |
| Create a Historical Call Volume Set from an Existing Data Set | 74 |
| Historical Call Volume Sets Overview | 75 |
| Manually Modify Data in a Historical Call Volume Data Set..... | 76 |
| Auto-Correct Selected Data in a Historical Call Volume Data Set..... | 77 |
| Add Events to Data in a Historical Call Volume Data Set..... | 78 |
| Auto-Correct Outliers in a Historical Call Volume Data Set | 79 |
| Undo/Revert Changes to a Historical Call Volume Data Set | 80 |
| Predict Call Volume..... | 80 |
| Modify Predicted Call Volume Data..... | 81 |
| Search Call Volume Forecasts..... | 82 |
| Designate a Forecast to Use for Reporting | 83 |
| Create a Schedule from a Call Volume Forecast | 83 |
| Delete a Call Volume Forecast | 83 |

Scheduling Employees 84

| | |
|--|----|
| Scheduling Overview..... | 84 |
| inContact WFM v1 Scheduler Service..... | 85 |
| Manually-Created Schedules Overview..... | 86 |
| Manually Create a Schedule..... | 87 |

| | |
|--|-----------|
| Create a Schedule Entry for a Manual Schedule | 87 |
| Manually Create a Schedule | 88 |
| Automatically Generate a Schedule | 88 |
| Create a Schedule Entry for an Automatically-Generated Schedule..... | 89 |
| Generate a Schedule | 89 |
| View or Edit a Schedule | 90 |
| Overtime for Period Tab Overview | 90 |
| Over/Under Staffing Tab Overview | 91 |
| Create an Over/Under Staffing Report | 92 |
| Service Level Tab Overview | 93 |
| Create a Service Level Report | 94 |
| Published Schedules Overview | 95 |
| Publish a Schedule..... | 96 |
| Undo Publish Schedule..... | 96 |
| Export a Schedule | 96 |
| Using Schedule Bidding..... | 97 |
| Schedule Bidding Overview | 97 |
| inContact WFM v1 Agent Ranking Criteria Overview | 97 |
| Create Agent Ranking Criteria..... | 98 |
| Edit or Delete Agent Ranking Criteria..... | 99 |
| Imported Agent Ranking Criteria Overview..... | 99 |
| Import Agent Ranking Criteria | 100 |
| Bidding Schedule Overview | 101 |

| | |
|--|------------|
| Manually-Created Bidding Schedules Overview..... | 102 |
| Manually Create a Bidding Schedule | 103 |
| Create a Schedule Entry for a Manual Bidding Schedule | 103 |
| Create a Bidding Schedule..... | 103 |
| Automatically-Generated Bidding Schedules Overview | 104 |
| Automatically Generate a Bidding Schedule | 105 |
| Create a Schedule Entry for an Automatically-Generated Bidding Schedule..... | 105 |
| Generate a Bidding Schedule | 105 |
| Edit a Bidding Schedule..... | 106 |
| Delete a Bidding Schedule..... | 106 |
| Award a Bidding Schedule..... | 107 |
| Undo a Bidding Schedule Award | 108 |
| Published Bidding Schedule Overview..... | 108 |
| Publish Bidding Schedule Awards..... | 108 |
| Undo Publishing a Bidding Schedule Award | 109 |
| Bidding Periods Overview..... | 109 |
| Initiate a Bidding Period | 109 |
| Manually Close a Bidding Period | 110 |
| Document Revision History | 111 |

Introduction

Audience

This document is written for agents, team leads, supervisors and schedulers who use inContact WFM v1 in the cloud. This section and the [Managing Your inContact WFM v1](#) section are applicable to all users. Beginning with the [Managing 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 knowledge, reference, and procedural information necessary to use inContact WFM v1 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 inContact WFM v1 has been installed and integrated with your inContact PBX. It also assumes that your inContact WFM v1 application administrator has configured the application for use based on your business rules and environment.

Need-to-Knows

inContact WFM v1 can be installed as a standalone system or with inContact WFO for call/screen recording and quality management. Some functionality is different in combined inContact WFM v1/inContact WFO systems. Refer to the appropriate inContact WFO manual for related information if yours is a combined system.

Several inContact WFM v1 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 inContact WFM v1 site.

inContact WFM v1 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 inContact WFM v1 are very granular. If you need to perform a task and are unable to do so, see your supervisor or inContact WFM v1 administrator.

The inContact WFM v1 database stores dates and times in UTC (Coordinated Universal Time), the primary time standard by which the world regulates clocks and time. In some cases, time may be displayed in UTC within the application.

In some cases, inContact WFM v1 provides more than one way to accomplish a task or access a feature. The procedures in this manual explain the primary method, but also note the **Alternative** where applicable.

inContact WFM v1 Terminology

inContact WFM v1 uses a variety of fields that are set by your system administrator. To use inContact WFM v1, you will need to understand these fields and application-specific terms:

- **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. inContact WFM v1 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 (such as Lunch or Meeting) or to events sent by the inContact PBX (such as On Call or 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 an inContact skill 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:** the same as inContact skills created in Central. 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 inContact WFM v1, the term "supervisor" has very specific meaning. A Supervisor in inContact WFM v1 must have the **Can be Supervisor** checkbox 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 inContact WFM v1. For more information, see [Supervisors Overview](#).
- **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 (such as trainer, supervisor, or team lead). Users can have the organizational title of supervisor, but not be a Supervisor in inContact WFM v1. See **Supervisor** for more information.

What's New in this Version

Feature and functionality changes in 16.1 include:

- This product, formerly known as Clarity WFM, has been rebranded as inContact WFM v1.
- Online help is now available for inContact WFO. This includes some features and functionality in inContact WFM v1. Help for the Premises and Hybrid versions of inContact WFO can be accessed via an icon in the inContact WFM v1 Web Portal or directly at <http://help.incontact.com/WFO/prem/help.htm>.

Managing Your inContact WFM v1

This section explains how to perform a variety of basic tasks with inContact WFM v1 that are typically common to agents and supervisors. These include logging in, password management, dashboard management, and using inContact WFM v1 to view your own schedule and make schedule requests.

Login

i These instructions assume user log in to inContact WFM v1. See "Configuring Permissions, Roles, and Accounts" in the *inContact WFM v1 Administration Manual* or the online help for more information.

Your system administrator or manager should provide you with the necessary information to log into inContact WFM v1: username, initial password, possibly a login mode, and the URL or link to the portal.

inContact WFM v1 does not support browser-based saving of your username for security reasons. You will need to type 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://wfmserver.yourcompany>).
2. Type your inContact WFM v1 username and password.
3. Click **Login**. inContact WFM v1 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.

i 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

i 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.

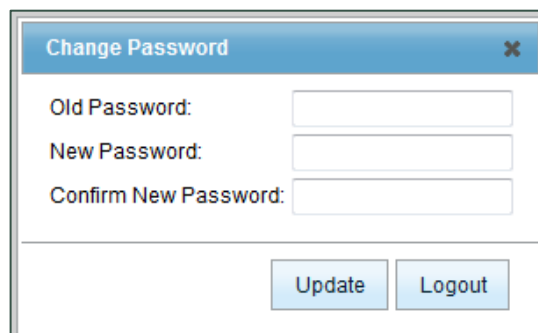
To use the feature:

1. Click the **Forgot Password** link on the login screen.
2. On the page, type 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 stating that your account does not have the appropriate permissions to generate a new password. In either case, contact your inContact WFM v1 system administrator to resolve the issue.

Change Your Password

A screenshot of a 'Change Password' dialog box. The dialog has a title bar with the text 'Change Password' and a close button (X). Inside the dialog, there are three text input fields labeled 'Old Password:', 'New Password:', and 'Confirm New Password:'. Below these fields 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 **Change Password** in the upper right-hand corner of any page.
2. In the **Old Password** field, type your existing password.
3. In the **New Password** field, type a new password.
4. Retype the password in the **Confirm New Password** field.
5. Click **Update**.

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, inContact WFM v1 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 inContact WFM v1 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.

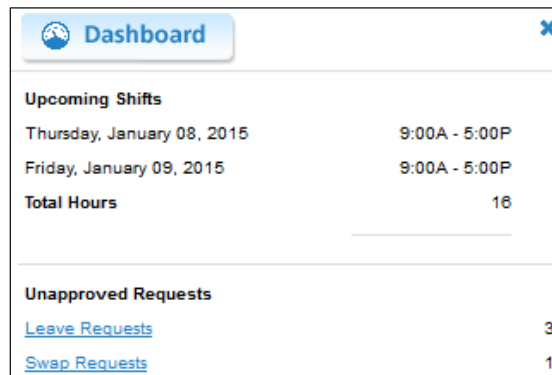
To update your employee information:

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 inContact WFM v1 administrator or see the "Create an Employee" section of the *inContact WFM v1 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.

Home Tab Widgets Overview

You can customize your inContact WFM v1 home page with a variety of widgets. This section provides an overview of the available widgets to help you decide which are appropriate for your needs.

Dashboard Widget



| Dashboard | |
|--------------------------------|---------------|
| Upcoming Shifts | |
| Thursday, January 08, 2015 | 9:00A - 5:00P |
| Friday, January 09, 2015 | 9:00A - 5:00P |
| Total Hours | 16 |
| 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) in the Dashboard widget. 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 [Respond to Multiple Employee Leave Requests](#).

Facebook/Twitter Widgets

If these widgets are configured by your inContact WFM v1 administrator, you 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.

Forecasts Widget

The Forecasts (or Forecast Feed) widget allows permissioned users to access their own forecast predictions from their Home page. Each forecast prediction in the widget contains a link that, when clicked, takes users to the linked forecast prediction. Forecast predictions can be removed from the widget by hovering over the link and then clicking the trash can icon that appears. Removing a forecast prediction from the widget does not delete the prediction. Forecast predictions can only be deleted from the Forecast Management page. If a forecast prediction is deleted from the Forecast Management page that prediction will no longer appear in any user's Forecasts widget.

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. Type 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 want to change.
2. In the dialog box, either edit the text and click **Update** OR click **Remove**.

 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.

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.

⚠ Do not use the **Blank widget.**

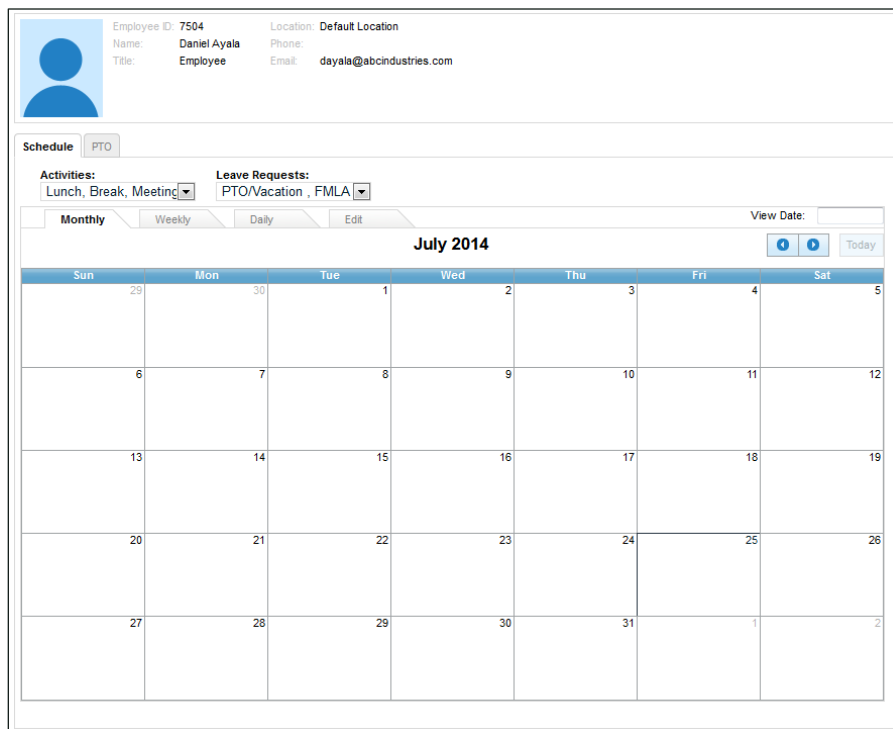
To add a widget:

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.

View Schedules

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



The screenshot displays the 'Schedule' view for an employee. At the top, a header bar shows the employee's profile: a blue circle icon, 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'. Under 'Schedule', there are dropdown menus for 'Activities' (set to 'Lunch, Break, Meeting') and 'Leave Requests' (set to 'PTO/Vacation, FMLA'). To the right of these is a 'View Date' field. Below the dropdowns are tabs for 'Monthly', 'Weekly', 'Daily', and 'Edit'. The 'Monthly' tab is selected, showing a calendar for July 2014. The calendar has columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The dates are arranged in a grid: Sun (29, 6, 13, 20, 27), Mon (30, 7, 14, 21, 28), Tue (1, 8, 15, 22, 29), Wed (2, 9, 16, 23, 30), Thu (3, 10, 17, 24, 31), Fri (4, 11, 18, 25, 1), and Sat (5, 12, 19, 26, 2). The calendar is currently empty of any schedule entries.

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, see [Managing 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.

Leave Requests Overview

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 inContact WFM v1 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.

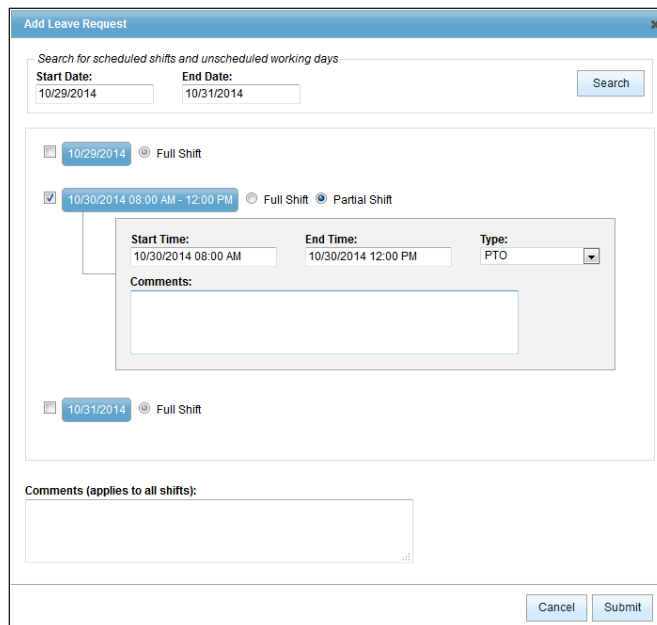
If you request leave for a partial shift, you can enter specific start and end times for the leave period. The minimum increment is 15 minutes.

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.

inContact WFM v1 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.



Once a leave request has been approved, the Scheduling Service will not schedule you on that date. However, published schedules that include the date do not show any indication that you have approved leave. You can see approved leave requests on the Leave History sub-tab of your PTO tab. You can also see them on your Schedule tab, where they show as a shift followed by a leave indicator:

| | | | | | | |
|----|----|----|----------------------------------|----|----|----|
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| | | | <div>Shift</div> <div>FMLA</div> | | | |

Request Leave

To request leave:

1. Click **Schedule** on your inContact WFM v1 Web Portal home page.
2. Click the PTO tab or, on the **Monthly** tab of the schedule, right-click the applicable date for your leave.
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 leave. Type 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 checkbox for the 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 **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, type additional information (optional).
10. In the **Comments (applies to all shifts)** field, type any information that would apply to multiple leave requests (if applicable), and click **Submit**.

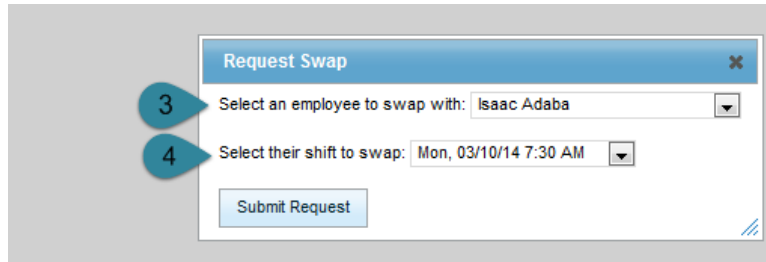
Shift Swaps Overview

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, inContact WFM v1 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, inContact WFM v1 sends a notification email to the Supervisor(s) of the Team(s) involved and the swap appears as a Pending Request in the Processes Report for approval by a Supervisor. Once the Supervisor approves the request, inContact WFM v1 swaps the shifts in the schedule.

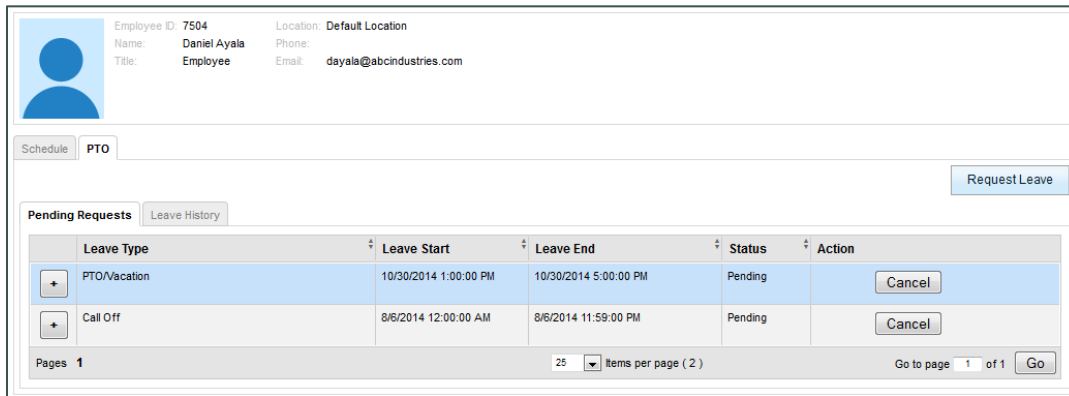
Request a Shift Swap



To request a shift swap:

1. On any tab of your schedule, right-click the schedule entry that you want to swap with another employee. 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



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

Schedule PTO Request Leave

Pending Requests Leave History

| | 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 |

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

With the appropriate permissions, you can see your pending leave requests and leave history as recorded in inContact WFM v1.

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 request.

The **Leave History** tab shows all leave requests processed in inContact WFM v1 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 inContact WFM v1 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 inContact WFM v1 administrator if you have questions.

Bid for Schedules
 Bid Schedule Name: Bid for 4/13 to 4/19

Mon Apr 14 2014 – Sun Apr 20 2014

Cancel Save Commit

| 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 (that is, "1" for your first choice, "2" for your second choice, and so on), and you can give multiple shifts the same rank. You do not have to bid on every shift. Once you commit your bids, you cannot 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**.

Managing 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 inContact WFM v1 administrator. The results of some tasks may not appear until after the inContact WFM v1 page has been refreshed.

Supervisors Overview

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.

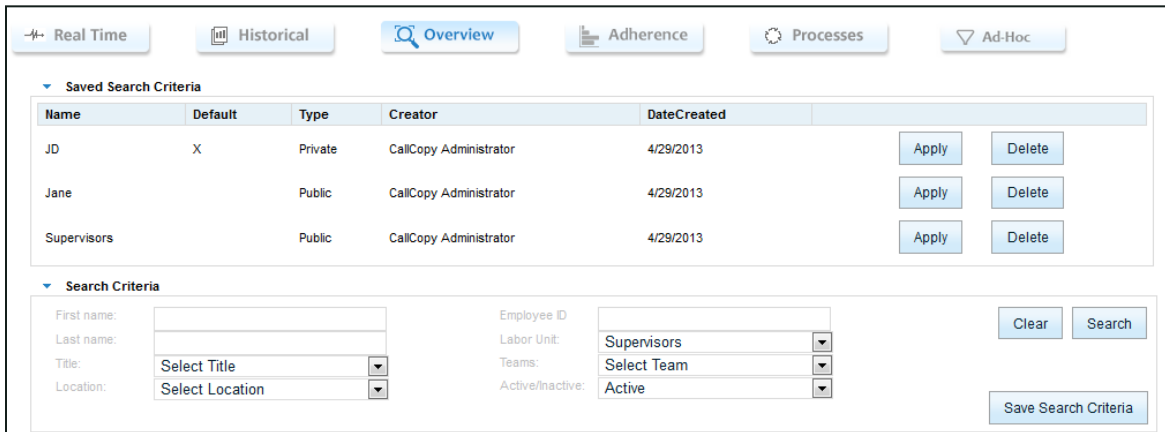
inContact WFM v1 can include titles in an employee's profile, but these are for search/filter purposes only. Entering "Supervisor" in the Title field on an employee's profile does **not** mean inContact WFM v1 will view that person as a supervisor.

In order to act with regard to a Team in inContact WFM v1, you must be configured as a Supervisor by your inContact WFM v1 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 inContact WFM v1 administrator about how your account is configured.

Searches and Filters Overview



Saved Search Criteria

| 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 |

Search Criteria

First name: Employee ID:

Last name: Labor Unit:

Title: Teams:

Location: Active/inactive:

Clear Search

Save Search Criteria

The **Search** window shown here is available from the **Employees** tab, in the Overview and Adherence reports (see [Schedule Overview Basics](#) and [Schedule Adherence Overview](#)), 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 previously. 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 applicable tab and/or report, and click **Search**.
2. Select the necessary criteria.
3. Click **Save Search Criteria**.
4. Type 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, and so forth:

1. Click the **Employee** tab and then click **Search**.
2. Type 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 inContact WFM v1 administrator or see the "Employee Account Field Reference" section of the *inContact WFM v1 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. Type 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**.

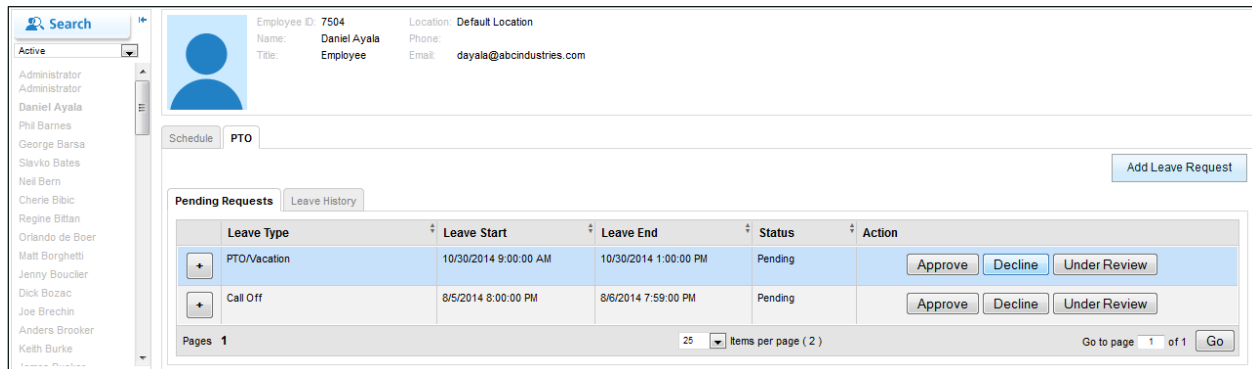
Edit Employee Schedules

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



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

Schedule: PTO

Add Leave Request

Pending Requests | Leave History

| 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 |

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

With appropriate permissions, you can search for and see pending requests and leave history as recorded in inContact WFM v1 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 inContact WFM v1 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

If two employees agree to swap shifts, and one or both of them are on a Team for which you are a Supervisor, inContact WFM v1 will notify you via email that a shift swap request is pending approval.

i Notification emails use your Viewing Time Zone to display information about the pending swap. If you do not have a Viewing Time Zone configured, the shifts will be shown in UTC.

The Processes page allows you to review these shift swap requests, along with leave requests from multiple employees (see [Respond to Multiple Employee Leave Requests](#)). With appropriate permissions, you can approve or decline shift swap requests from members of your Team, or from all employees. inContact WFM v1 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 [Shift Swaps Overview](#).

To approve or decline employee shift swap requests:

1. Click the **Reports** tab and then click **Processes**.
2. Scroll to the bottom of the screen to see pending shift swap requests.
3. Click **Approve** or **Decline** for the request.

Employee Leave Requests Overview

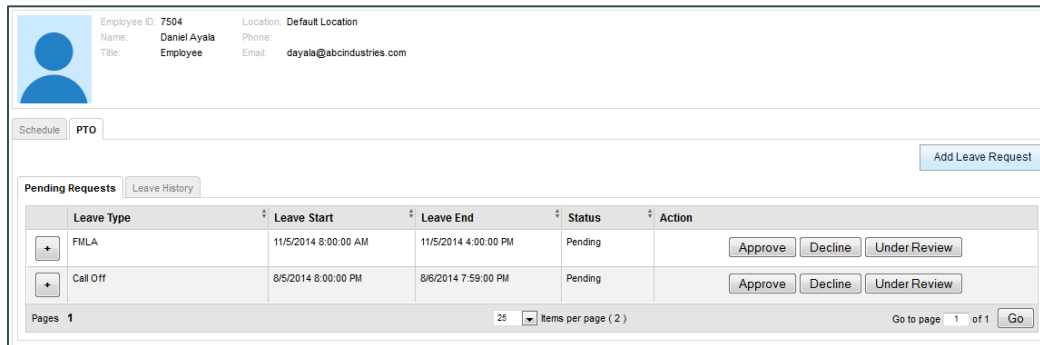
Each organization approaches leave management differently. In some, supervisors submit leave and shift swap requests on behalf of their employees. Most organizations allow employees to submit leave requests themselves, although some require supervisors to submit call offs (when an employee does not report 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 (that is, 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 | 8/5/2014 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 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. Type **Comments** (optional), 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 and click **Approve**.

When you approve or decline a request, inContact WFM v1 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 Leave Requests](#)).

Respond to Multiple Employee Leave Requests

The Processes page allows you to review shift swap and leave requests from multiple employees at once (see also [Manage Employee Shift Swap Requests](#)). 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 use the sort triangles at the top of each column to sort the display by the contents of that column. You can also configure the number of requests that are shown per page.

The current status of each request is disabled in the display. With appropriate permissions, 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.

First name:

Last name:

Title:

-- Select Title --

Location:

-- Select Location --

Teams:

-- Select Team --

Status:

Pending

Start Date Range:

End Date Range:

Clear

Search

Leave Request

| Name | Request Type | Location | Title | Teams | Status | Leave Start | Leave End | Actions |
|------------------------------|--------------|------------------|----------|------------------|---------|----------------------|----------------------|------------------------------|
| Daniel Ayala | FMLA | Default Location | Employee | FrenchAtMidnight | Pending | 11/5/2014 6:00:00 AM | 11/5/2014 2:00:00 PM | Approve Decline Under Review |
| Daniel Ayala | Call Off | Default Location | Employee | FrenchAtMidnight | Pending | 8/5/2014 6:00:00 PM | 8/6/2014 5:59:00 PM | Approve Decline Under Review |

Pages 1

25 Items per page (2)

Go to page 1 of 1 Go

Swap Request

| Name | Location | Title | Shift Start | Shift End | Swap With | Shift Start | Shift End | Status | Actions |
|------------------------------|------------------|----------|---------------------|---------------------|-------------------------------|---------------------|---------------------|---------|-----------------|
| Daniel Ayala | Default Location | Employee | 1/8/2015 6:00:00 AM | 1/8/2015 2:00:00 PM | Sheryl Coscia | 1/8/2015 7:00:00 PM | 1/8/2015 7:00:00 PM | Pending | Approve Decline |

Pages 1

25 Items per page (1)

Go to page 1 of 1 Go































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 want to change the status.
3. In the **Comments** field, type comments (optional).

Reporting 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 Overview

| 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 |   |
| RIVERA, FELIX | 3010029 | Corax - HSI | 500, 505, 510, 515, 520, 525, ... | Off Shift | Available | -- | 00:02:52 |   |
| HULL, ANGELICA | 3020006 | Corax - HSI | 500, 505, 507, 510, 512, 515, ... | Off Shift | Off Shift | -- | 13:52:51 |   |
| AGENT, CALLCOPY | 3010034 | Corax - HSI | 500, 505, 506, 507, 508, 510, ... | Off Shift | Available | -- | 00:01:23 |   |
| ZAMORA, MABLE | 3010001 | Corax - HSI | 500, 505, 506, 508, 510, 511, ... | Off Shift | Available | -- | 01:37:01 |   |
| RUTLEDGE, COREY | 3010091 | Corax - HSI | 500, 505, 507, 510, 512, 515, ... | Off Shift | Available | -- | 00:02:44 |   |
| WELCH, TERRENCE | 3010030 | Corax - HSI | 500, 505, 506, 507, 508, 510, ... | Off Shift | Available | -- | 00:01:34 |   |
| Rankin, Cheryl | 3010093 | Corax - HSI | 500, 505, 510, 515, 520, 525, ... | Off Shift | Available | -- | 00:00:30 |   |
| CONTRERAS, KRISTINE | 3010036 | Corax - HSI | 500, 505, 510, 515, 520, 525, ... | Off Shift | Available | -- | 00:00:36 |   |
| STRONG, CLINTON | 3010140 | Corax - HSI | 500, 505, 507, 510, 512, 515, ... | Off Shift | Off Shift | -- | 21:29:35 |   |
| PRESTON, MALINDA | 3010003 | Corax - HSI | 500, 505, 507, 510, 512, 515, ... | Off Shift | Lunch | -- | 00:04:44 |   |
| WARNER, JEAN | 3010170 | Corax - HSI | 500, 505, 510, 515, 520, 525, ... | Off Shift | Available | -- | 00:14:22 |   |
| ELLISON, LESLEY | 3010108 | Corax - HSI | 500, 505, 506, 507, 508, 510, ... | Off Shift | Available | -- | 00:12:27 |   |
| 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 inContact WFM v1. 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 [Real-Time Roster Filter Reference](#)), 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.

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 want 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 want to remove.

To add a removed employee back to the roster:

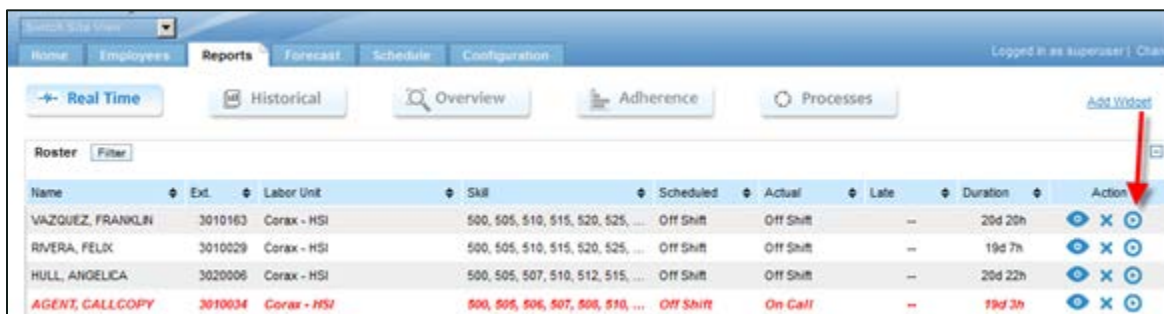
1. Click the **Reports** tab and then click **Real Time**.
2. In the Roster area, click **Filter**.
3. Locate the employee in the Removed Agents list.
4. Click **Cancel**.
5. Click **Filter**. The roster refreshes, and the user appears on the list.













Monitor Agents in Real Time (Live Monitor)

i The Live Monitoring feature requires that inContact Call Recording be installed and configured along with inContact WFM v1. Desktop activity monitoring also requires licensing for the inContact WFO Screen Recording feature. This functionality is not available in a standalone installation of inContact WFM v1.

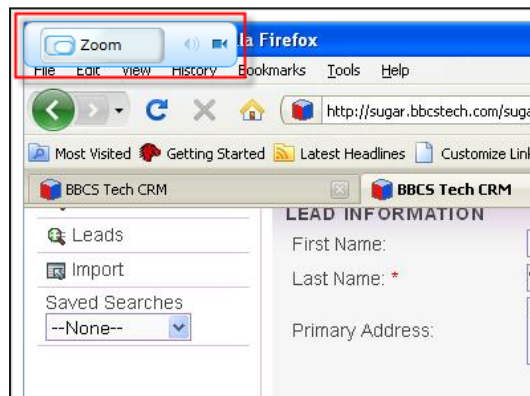
To access live feeds of an agent's audio and/or desktop in near-real-time:

1. From the Real-Time Roster screen, scroll to the agent to be monitored, and click the Play button in the Action column.



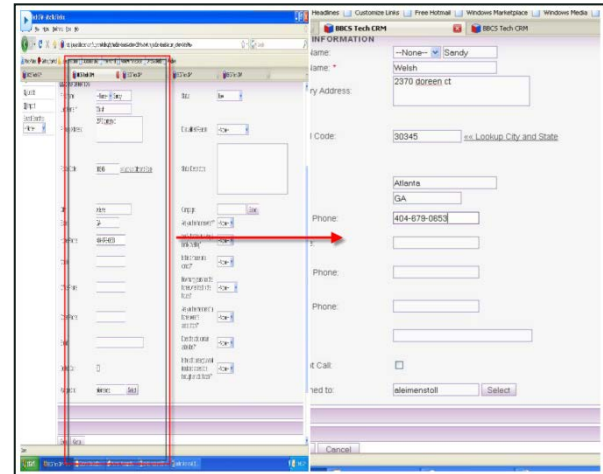
| Name | Ext. | Labor Unit | Skill | Scheduled | Actual | Late | Duration | Action |
|-------------------|---------|-------------|-----------------------------------|-----------|-----------|------|----------|---|
| VAZQUEZ, FRANKLIN | 3010163 | Corax - HSI | 500, 505, 510, 515, 520, 525, ... | Off Shift | Off Shift | -- | 20d 20h |    |
| RIVERA, FELIX | 3010029 | Corax - HSI | 500, 505, 510, 515, 520, 525, ... | Off Shift | Off Shift | -- | 19d 7h |    |
| HULL, ANGELICA | 3020006 | Corax - HSI | 500, 505, 507, 510, 512, 515, ... | Off Shift | Off Shift | -- | 20d 22h |    |
| AGENT, CALLCOPY | 3010034 | Corax - HSI | 500, 505, 506, 507, 508, 510, ... | Off Shift | On Call | -- | 19d 3h |    |

2. Hover the mouse cursor over the triangle 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.

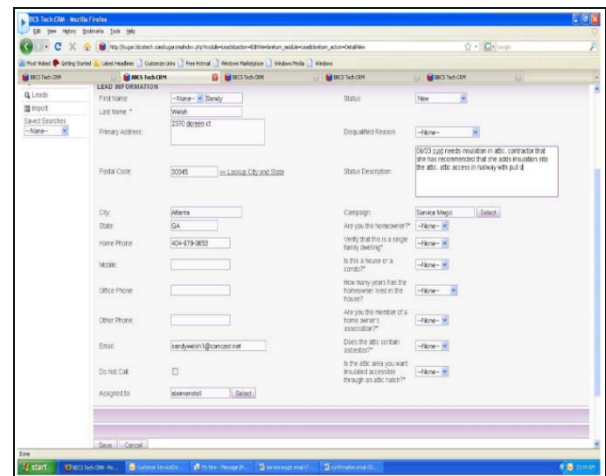


3. Click **Zoom** to toggle through three different zoom levels:

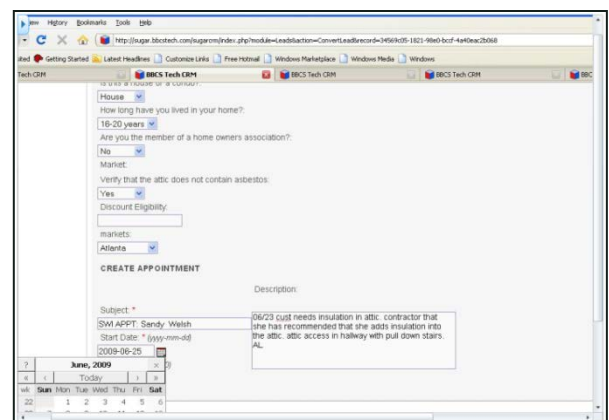
- **Split** shows a compressed view of the entire screen on one side. You can move the zoom marker to different parts of the screen, which then show zoomed to 100% on the other side.



- **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.

Real-Time Roster Filter Reference

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 [inContact WFM v1 Terminology](#)):

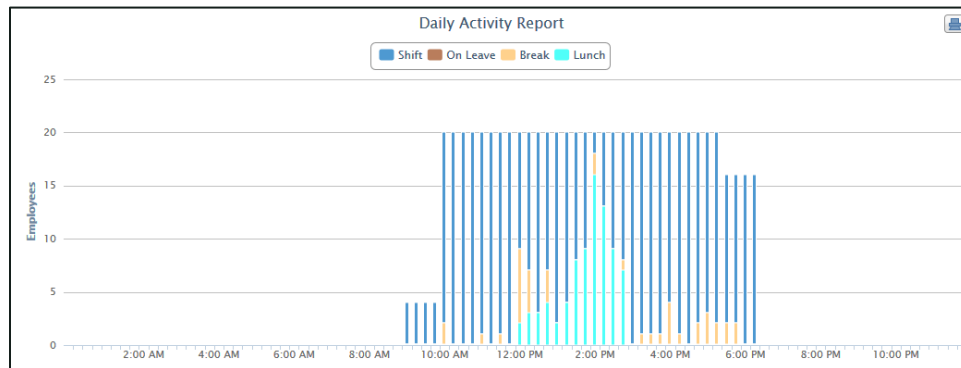
- **Labor Unit**
- **Skill**
- **Scheduled:** Shows the Shift Activity Type scheduled for the agent at the current time.
- **Actual:** Shows the status (Roster Type) of the agent at the current time, usually based on information sent by your PBX/ACD.
- **Removed Agents:** Lists agents that have been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

Schedule Overview Basics

| <div> <div>Shift</div> <div>Lunch</div> <div>Break</div> <div>Meeting</div> <div>Training</div> <div>Advanced Training</div> <div>PTO/Vacation</div> <div>FMLA</div> <div>Call Off</div> <div>Unpaid</div> </div> <div>New Type</div> | | View Date: <input type="text"/> | | | | | | |
|---|------------|--|------------|------------|------------|------------|------------|------------|
| <div> <div>Daily</div> <div>Weekly</div> </div> | | <div> <div>Feb 16 – Feb 22, 2014</div> <div>Today</div> </div> | | | | | | |
| 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 | | | | | | | |
| Doe | Jane | | | | | | | |
| Doe | John | | | | | | | |
| Falk | Ken | | | | | | | |
| GIBBS | REGINALD | | | | | | | |
| JUAREZ | ERIK | | | | | | | |
| KEMP | MARI | | | | | | | |

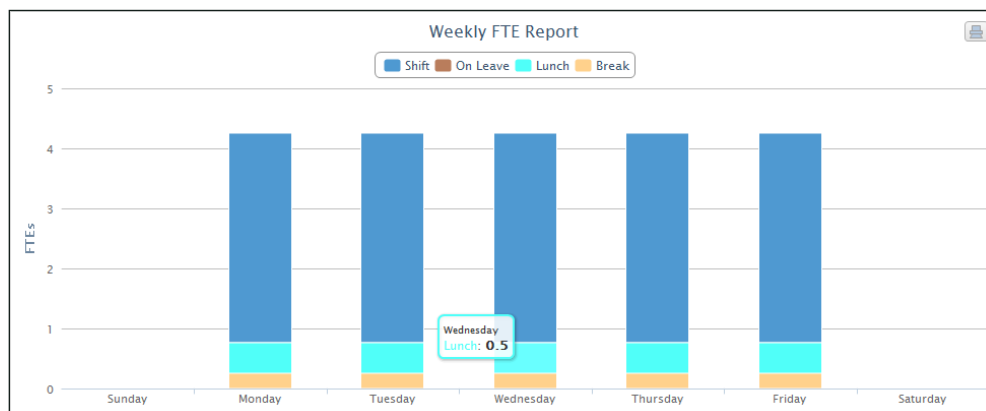
The **Overview** button on the **Reports** tab offers Supervisors high-level daily and weekly views of employee schedules. With appropriate permissions, you can make schedule adjustments that affect multiple employees. If you need to perform one of these tasks and are unable to do so, see your inContact WFM v1 administrator. This tab also provides various reports that offer daily and weekly views of staffing information.

Daily Reports



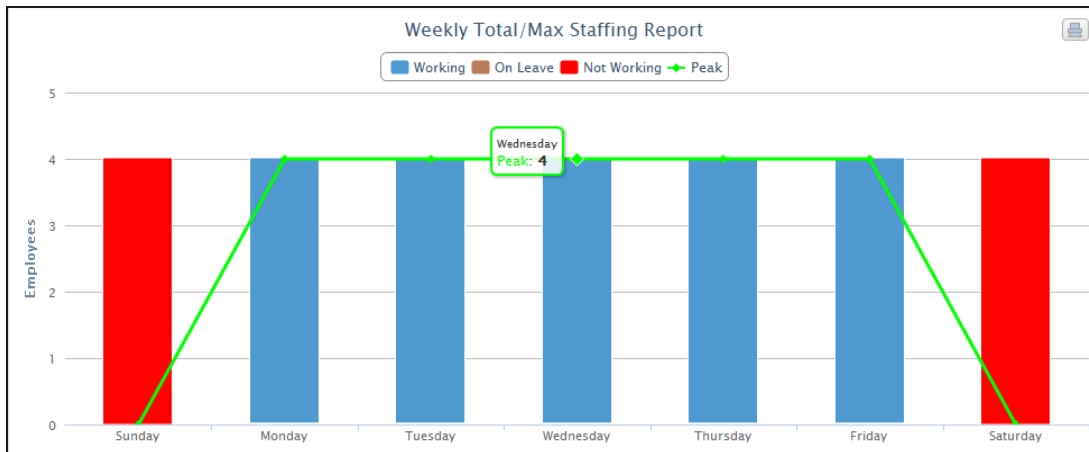
By default, the **Schedule Overview** displays the **Daily Activity Report** following the schedule itself. This report provides a visual representation of coverage throughout the specified day. To print this report, click **Print** in the upper right corner.

Weekly Reports



When you click the **Weekly** tab, the Daily Activity Report is replaced by several weekly reports. 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.

i 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.

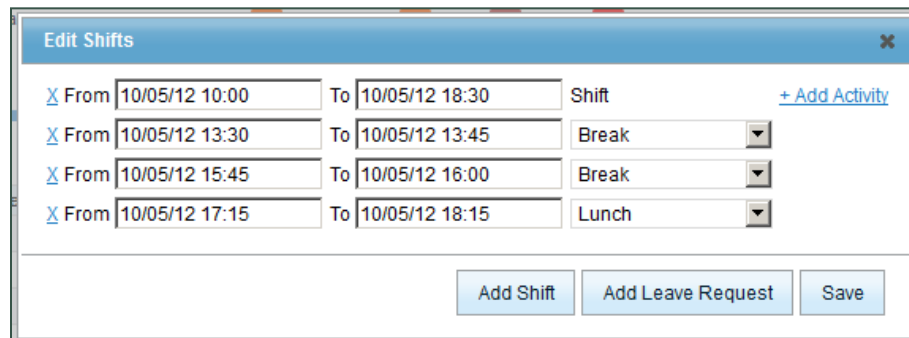
i If an employee requested leave during the week, and the request was made when the employee did not have a shift scheduled, that employee will not be reflected in these reports since they were not available for the week.

View Employee Schedules in the Schedule Overview

To view employee schedules:

1. Click the **Reports** tab and then click **Overview**.
2. Select from **Saved Search Criteria** or type new search criteria 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 Shifts in the Schedule Overview



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

[+ Add Activity](#)

[Add Shift](#) [Add Leave Request](#) [Save](#)

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 your revisions to the shift and click **Save**.

Add an Event to Multiple Employee Schedules

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**.

Add a Shift to Multiple Employee Schedules

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**.

Schedule Adherence Overview

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. Data can also be exported for review by non-inContact WFM v1 users or for use with other applications.

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%. inContact WFM v1 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

First name:

Last name:

Title:

Location:

Schedule Type:

Employee ID:

Labor Unit:

Teams:

Active/Inactive:

Group By:

Clear

Search

Save Search Criteria

Shift

Lunch

Break

Meeting

Training

Admin Time

Admin Time

Admin Time

PTO/Vacation

FMLA

Call Off

Unpaid

View Date: 03/13/2015

Export


Daily

Weekly

March 13

Today

| Team Name | 8AM | 9AM | 10AM | 11AM | 12PM | 1PM | 2PM | 3PM | 4PM | 5PM |
|----------------------|-----|-----|------|------|------|-----|-----|-----|-----|-----|
| Leslie Team | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Rama Team | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Unassigned to a Team | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |

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.

To export daily adherence data into a .csv file for presentation to non-inContact WFM v1 users:

- Click **Export**, then select either **Open** or **Save** and click **OK**.

Weekly Adherence

[illegible]

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.

To export weekly adherence data into a .csv file for presentation to non-inContact WFM v1 users:

- Click **Export**, then select either **Open** or **Save** and click **OK**.

Real-Time Reports Overview

The **Real Time** button on the **Reports** tab offers 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:

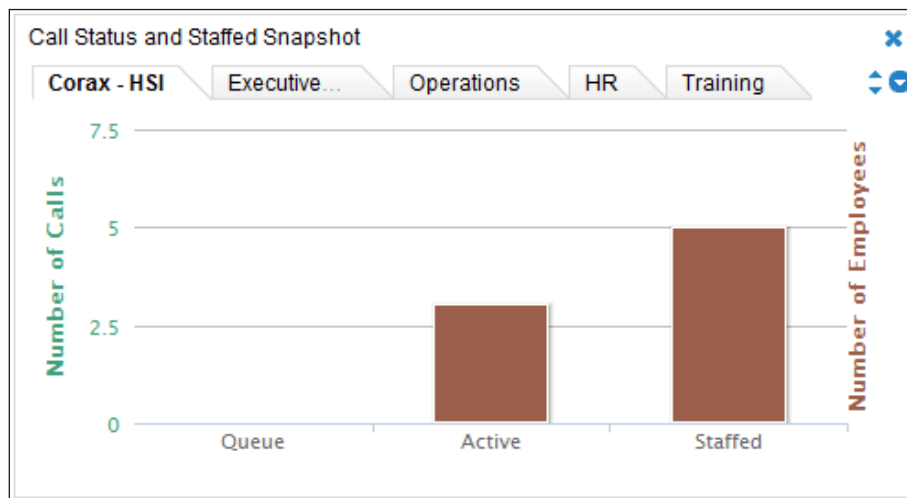
- Click a widget's up/down arrows (↕).

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

Click a widget's blue-dot arrow (↕).

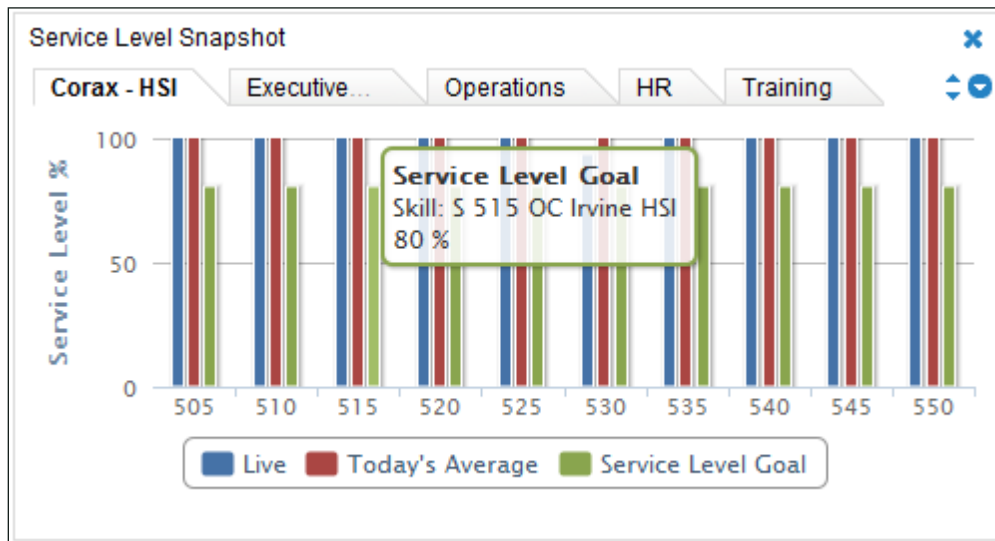
Each real-time widget uses a default time period that cannot be changed. Data in the widgets refresh every 15 seconds. Real-time data for call activity comes from the PBX/ACD. Placing the cursor over a column or line provides specific numbers for that column or line. Some widgets use two x-axis units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

Call Status and Staffed Snapshot



This report widget displays the number of Active and In-Queue calls for a period of time. Staffed indicates the number of employees on duty.

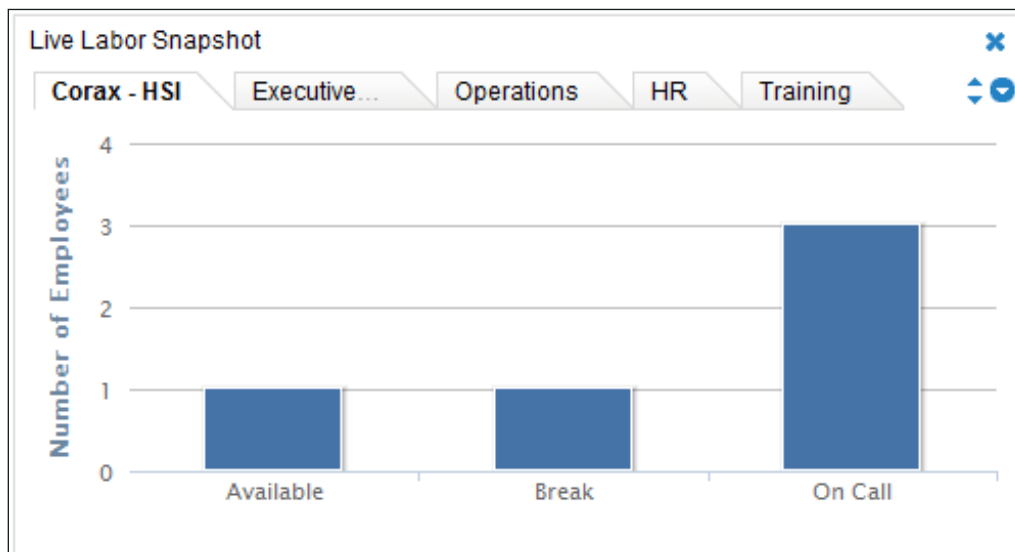
Service Level Snapshot



This widget displays how successful each Labor Unit is in meeting Service Level goals. Service Level numbers are tied to Skills and configured by your inContact WFM v1 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.

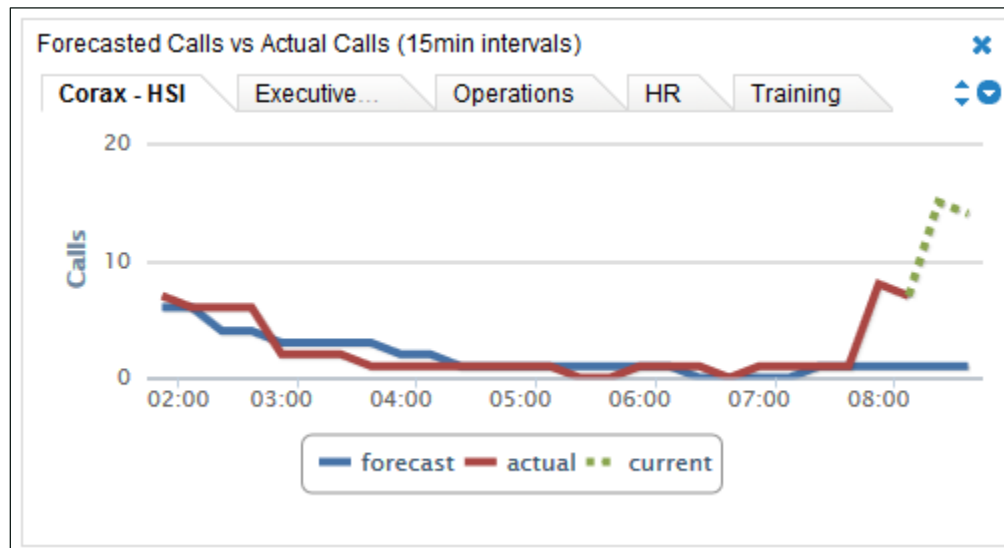
i The Service Level Snapshot widget may require a page refresh to display the latest information.

Live Labor Snapshot



This widget displays the actual agent status based on their PBX login status and schedule.

Forecasted Calls vs. Actual Calls



This widget 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



This widget offers a numerical view instead of a graphical view for those who prefer to see actual numbers. Under **Service Levels**, **Live** is real-time data as reported to inContact WFM v1 by the ACD for the most recent interval. **Today** is calculated by inContact WFM v1 as Number of calls answered within the acceptable wait time for the skill / Total number of calls answered.

Historical Reports Overview

The **Historical** button on the **Reports** tab offers a selection of report widgets to display specific information. Each widget organizes data by Labor Unit on tabs across the top of the widget.

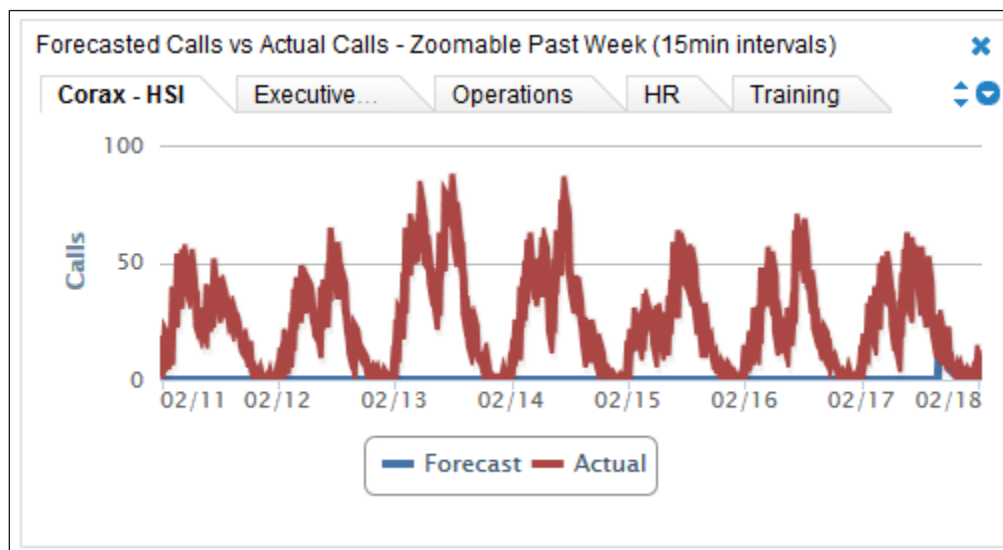
To scroll through the available Labor Unit tabs:

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

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

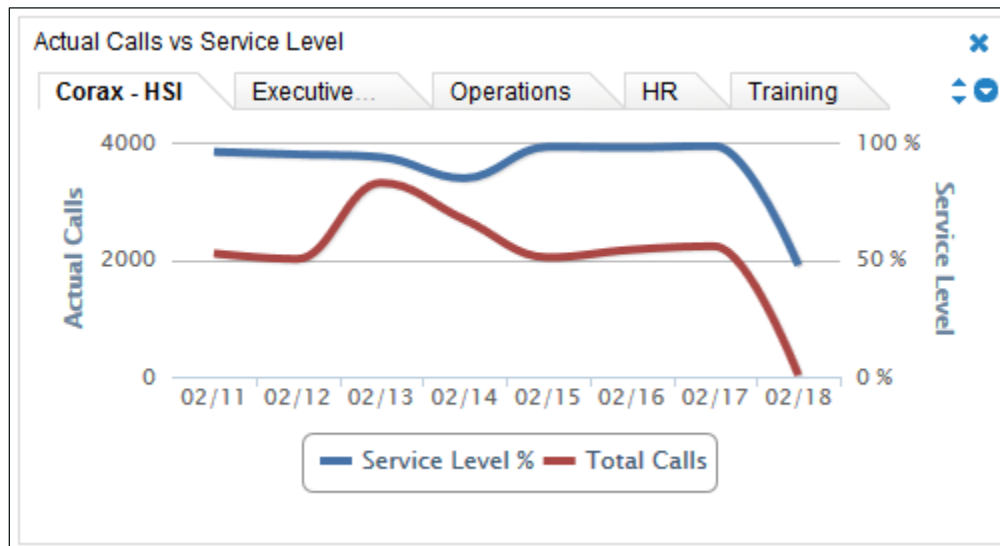
Click a widget's blue-dot arrow (⌵).

Forecasted Calls vs. Actual Calls



This widget 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



This widget 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.

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  icon in the top right corner of that widget.

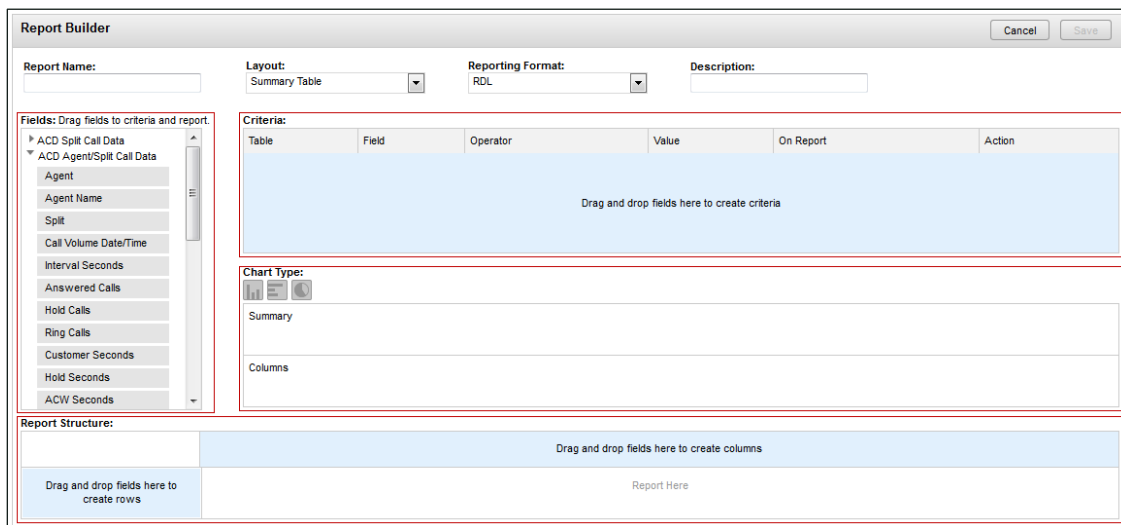
Ad Hoc Reports Overview

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 inContact WFM v1 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.

By default, the number of data rows returned by any ad hoc report is limited to 30,000. This can be changed by your inContact WFO installation team, or after installation by inContact WFO Support. inContact WFM v1 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.

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 fields to drag into criteria and report. The list includes: 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 a prompt 'Drag and drop fields here to create criteria'.
- Chart Type:** A section with icons for 'Summary' and 'Columns'.
- Report Structure:** A section with a prompt 'Drag and drop fields here to create columns' and a 'Report Here' button.

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.

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

i Ad hoc reports show the date/time fields in UTC. Thus, you may notice differences between ad hoc reports and what you see in the inContact WFM v1 user interface.

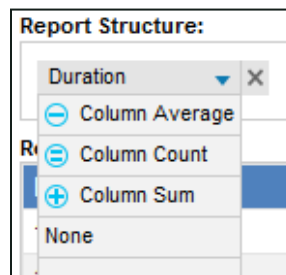
Chart Types in Ad Hoc Reports

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**.

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

| 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, 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:

Layout:

Reporting Format:

Description:

Leave by Agent by Quarter

Matrix Table

RDL

Fields: Drag fields to criteria and report.

Criteria:

Leave Requests

Agent

Agent Name

Location

Team

Labor Unit

Skill

| Table | Field | Operator | Value | On Report | Action |
|----------------|------------|--------------------------|---------------|--------------------------|-----------------------------------|
| Leave Requests | Start Date | Greater than or equal to | 01/01/2014 | <input type="checkbox"/> | <div>Move</div> |
| Leave Requests | Start Date | Less than or equal to | 06/30/2014 | <input type="checkbox"/> | <div>Move</div> |
| Agent | Agent Name | Does not contain | Administrator | <input type="checkbox"/> | <div>Move</div> <div>Delete</div> |

Chart Type:

☒

☐

☐

☐

Summary

☒ Agent Name

Columns

☒ Leave Type Count

Report Structure:

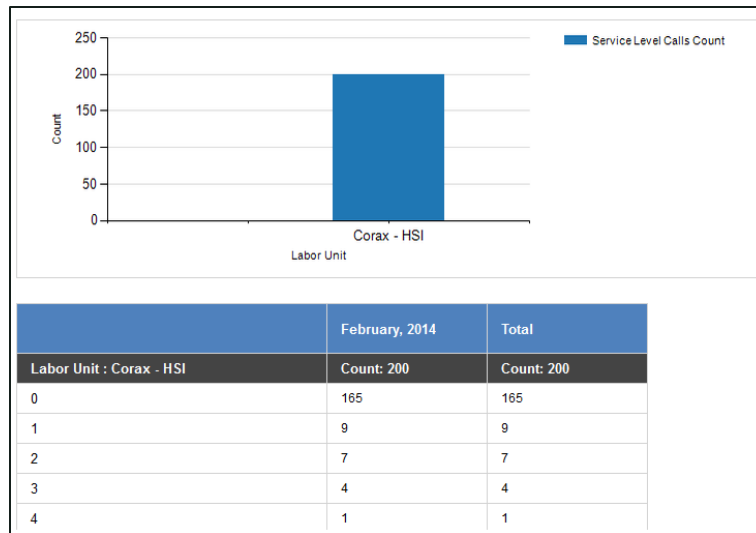
Leave Type

Start Date - Quarter

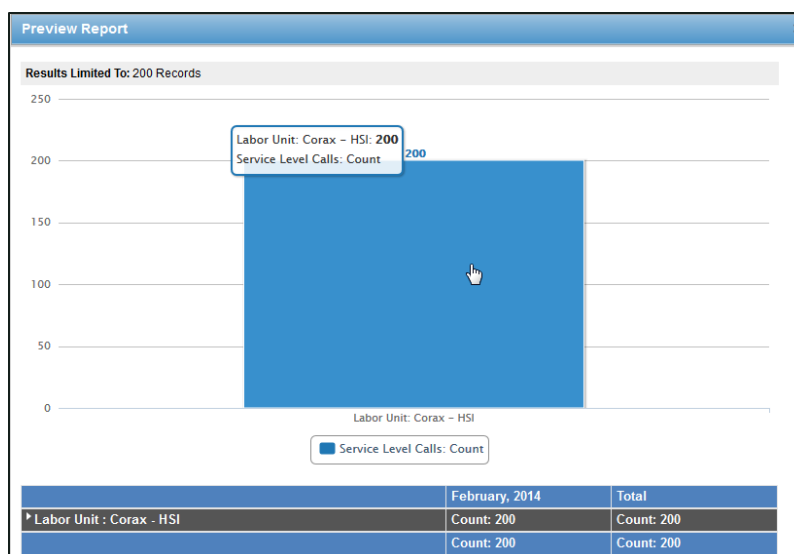
Agent Name

| | Q1 - 2014 | Q2 - 2014 | Total |
|--------------------------------|-----------|-----------|----------|
| ▼ Agent Name : Ayala, Daniel | Count: 2 | Count: 0 | Count: 2 |
| Call Off | 2 | 0 | 2 |
| ▼ Agent Name : George, Gina | Count: 1 | Count: 0 | Count: 1 |
| Call Off | 1 | 0 | 1 |
| ▼ Agent Name : Ryan, Phillip | Count: 2 | Count: 0 | Count: 2 |
| Call Off | 2 | 0 | 2 |
| ▼ Agent Name : Hamilton, Brian | Count: 0 | Count: 1 | Count: 1 |
| PTO/Vacation | 0 | 1 | 1 |
| | Count: 5 | Count: 1 | Count: 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.



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.

| ACD Call and Agent Data | | | | | | | |
|--|-------------|--|-------------|--|--------------|----------------|---|
| <input type="text" value="ACD"/> <input type="button" value="Go"/> | | <input type="button" value="Create a Report"/> | | | | | |
| Report | Description | Status | Saved By | Date Saved | Published By | Date Published | Action |
| ACD Agent Data - Simple | | Saved | User, Admin | 5/23/2013 | NA | NA | <input type="button" value="View"/> <input type="button" value="Delete"/> |
| ACD Agent Data - Summary - HTML | | Saved | User, Admin | 5/23/2013 | NA | NA | <input type="button" value="View"/> <input type="button" value="Delete"/> |
| ACD Agent/Split - Simple | | Saved | User, Admin | 5/23/2013 | NA | NA | <input type="button" value="View"/> <input type="button" value="Delete"/> |
| ACD Agent/Split - Summary | | Saved | User, Admin | 5/23/2013 | NA | NA | <input type="button" value="View"/> <input type="button" value="Delete"/> |
| ACD Split - Simple Criteria | | Saved | User, Admin | 5/23/2013 | NA | NA | <input type="button" value="View"/> <input type="button" value="Delete"/> |
| ACD Split - Summary Criteria | | Saved | User, Admin | 5/23/2013 | NA | NA | <input type="button" value="View"/> <input type="button" value="Delete"/> |
| Remaining ACD Fields - Summary HTML | | Saved | User, Admin | 5/23/2013 | NA | NA | <input type="button" value="View"/> <input type="button" value="Delete"/> |
| Pages 1 | | 10 Items Per Page | | Go to page: 1 of 1 <input type="button" value="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 category of reports from the drop-down list.
3. Click **Create a Report** in the upper right corner.
4. Type a **Report Name**.
5. Type 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 applicable fields into the **Report Structure** area. To remove a field, click the X on the field label.
9. Set any additional reporting options. For related information, see [Report Structure](#).
10. Drag any applicable fields to the **Criteria** section, select an operator and enter a value. For related information, see [Ad Hoc Report Fields and Criteria](#).
11. Set **Chart Type** options.
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** checkbox in the **Save Report** dialog box.
3. Type 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. This can sometimes be beneficial in environments where the Report Server and the inContact WFM v1 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, inContact WFM v1 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 applicable category of reports from the drop-down list.
3. Double-click the report or click **View** at the right end of the report's row in the list.
4. Click **Edit** and make any changes to the report. For related information, see [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 (for example, 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 applicable category of reports from the drop-down list.
3. Double-click the 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. Type 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 applicable category of reports from the drop-down list.
3. Double-click the 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. Type a new name for the report (optional), and click **OK**.

i After 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.

Ad Hoc Reporting Fields Reference

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 in the inContact PBX integration.

ACD Split Call Data

- **Call Volume Date/Time:** Click the calendar icon to enter search criteria using date selector.
- **Split:** Type search criteria in the open-entry textbox.
- **Device:** Type search criteria in the open-entry textbox.
- **Interval Seconds:** This is the time interval for which data should be pulled. Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).
- **Offered Calls:** Type search criteria in the open-entry textbox; whole number values only.
- **Answered Calls:** Type search criteria in the open-entry textbox; whole number values only.
- **Service Level Calls:** Type search criteria in the open-entry textbox; whole number values only.

- **Abandoned Calls:** Type search criteria in the open-entry textbox; whole number values only.
- **Abandoned Seconds:** This is the total time in seconds that abandoned calls were on hold before caller hung up. Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).

ACD Agent/Split Call Data

- **Split:** Type search criteria in the open-entry textbox.
- **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. Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).
- **Answered Calls:** Type search criteria in the open-entry textbox; whole number values only.
- **Hold Calls:** This is the number of calls that were placed on hold one or more times. Type search criteria in the open-entry textbox; whole number values only.
- **Ring Calls:** Type search criteria in the open-entry textbox; whole number values only.
- **Customer Seconds:** This is the talk time in seconds. Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).
- **Hold Seconds:** Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).
- **ACW Seconds:** This is time spent on after-call work. Type search criteria in the open-entry textbox as seconds (for example, 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. Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).
- **Logged in Seconds:** This is the total number of seconds logged into the ACD. Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).
- **Available Seconds:** This is the total number of seconds available to take calls (that is, waiting for a call). Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).

- **Inactive Seconds:** This is the total number of seconds in inactive modes (such as lunch, break, or training). Type search criteria in the open-entry textbox as seconds (for example, 3600 seconds = 1 hour).

Skill

- **Skill:** Type search criteria in the open-entry textbox.

Labor Unit

- **Labor Unit:** Type search criteria in the open-entry textbox.

User

- **Agent Name:** Type search criteria in the open-entry textbox.

Team

- **Team:** Type search criteria in the open-entry textbox.
- **Team Supervisor:** Type search criteria in the open-entry textbox.

Service Level

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

Forecast Call Data

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

👉 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 (for example, 150% is not a good result).

- **Split:** Type search criteria (split or skill number) in the open-entry textbox.
- **Forecasted Calls:** Type search criteria in the open-entry textbox; numeric values only.
- **Forecast Interval Seconds:** Type search criteria in the open-entry textbox; numeric values only.
- **Forecast Skill Name:** Type search criteria in the open-entry textbox.

- **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:** Type search criteria in the open-entry textbox.
- **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. Type search criteria in the three provided boxes as hours, minutes, seconds.
- **Comment:** Type search criteria in the open-entry textbox.
- **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:** Type search criteria in the open-entry textbox.

Agent

- **Agent:** Type search criteria in the open-entry textbox.
- **Location:** Type search criteria in the open-entry textbox.

Team

- **Team:** Type search criteria in the open-entry textbox.
- **Team Supervisor:** Type search criteria in the open-entry textbox.

Labor Unit

- **Labor Unit:** Type search criteria in the open-entry textbox.

Skill

- **Skill:** Type search criteria in the open-entry textbox.

Shifts

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

Shift

- **Agent Name:** Type search criteria in the open-entry textbox.
- **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. Type search criteria in the three provided boxes as hours, minutes, seconds.
- **Activity:** This is the type of activity (for example, lunch, meeting, training, break, and so forth). Type search criteria in the open-entry textbox.
- **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. Type 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:** Type search criteria in the open-entry textbox; numeric values only.

Labor Unit

- **Labor Unit:** Type search criteria in the open-entry textbox.

Skill

- **Skill:** Type search criteria in the open-entry textbox.

Team










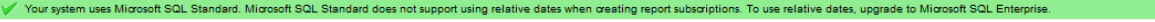












- **Team:** Type search criteria in the open-entry textbox.
- **Team Supervisor:** Type search criteria in the open-entry textbox.

Using Report Tools

Report Subscriptions Overview

i This section covers use of Report Subscriptions in a standalone inContact WFM v1 system. If you have a combined inContact WFO/inContact WFM v1 system, refer to the "Report Subscriptions" section of the *inContact WFO Reporting Manual*.

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 inContact WFM v1 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 inContact WFM v1 administrator.

|  Real Time |  Historical |  Overview |  Adherence |  Processes |  Ad Hoc |  Tools |
|--|--|--|---|---|--|---|
| Report Subscriptions  | | | | | | |
| Report Subscriptions  | | | | | | |
|  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. | | | | | | |
| 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 |   |
| Survey Summary by Question | | New Subscription | Survey Report User | 7/14/2014 3:01:37 PM | Never |   |
| System Usage | | New Subscription | System Report User | 7/14/2014 2:56:18 PM | Never |   |
| Group Membership Report | | New Subscription | Call Report User | 7/14/2014 2:49:48 PM | Never |   |
| Weighted QA Group Periodical Trending Report | | New Subscription | QA Report User | 7/14/2014 2:42:08 PM | Never |   |
| Survey Overview | | New Subscription | Survey Report User | 7/14/2014 1:49:39 PM | Never |   |

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

The preferred method for delivering reports is via 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. Reports are sent as email attachments.

The inContact WFM v1 deployment team configures an email account for the SQL Report Server to use during the installation process.

inContact WFM v1 also supports delivery of reports via file share, but this requires special configuration and is typically not recommended. Talk to your deployment team and/or inContact WFM v1 administrator if you have questions.

Load the Report Subscriptions Page

To load the **Report Subscriptions** page in inContact WFM v1:

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. Follow the procedure to [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 Email delivery method from the **Delivered by** drop-down list.
5. Follow the procedure to [Set Email 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. Follow the procedure to [Set Schedule Options](#).
8. Set the report parameter values if needed and then click **Save**. Refer to the specific report description for more information on parameters associated with that report.

i 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.

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 return to the [Create a Report Subscription](#) procedure.

To set up email delivery options:

1. In the **To:**, **Cc:** and **Bcc:** boxes, type email address(es) for primary recipient(s) and secondary recipient(s). Use a semi-colon to separate addresses.
2. In the **Reply-To:** box, type the email address to which recipients should respond if they have questions. This field is required.
3. In the **Subject** box, type a new subject line (optional); otherwise, use the default subject created by the application.
4. Select the checkbox for **Include Report** to send the report as an email attachment.
5. Select the **Render Format** from the drop-down list.
6. Select the **Priority** for the email report deliveries from the drop-down list.
7. In the **Comment** box, enter any text you want to be included in the email body.

Set Schedule Options

Schedule options for report subscriptions are configured as a sub-task of creating a report subscription. 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, 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 (for example, Hourly Schedule, One-time Schedule, and so forth).
3. Click the calendar icon and use the date selector to set the date to **Begin running this schedule**.
4. Select the checkbox to **Stop this schedule** if applicable, 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.

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.

To edit the settings of a subscription:

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

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 subscription.
2. Click **OK** to confirm the deletion.

Shared Schedules Overview

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 inContact WFM v1 administrator.

Load the Shared Schedules Page

To load the **Shared Schedules** page in inContact WFM v1:

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 inContact WFM v1 and click **New**.
2. Type 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.

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.

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

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

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**:

- Click **Delete** in the **Action** column for the schedule and then click **OK**.

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

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

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

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

Forecasting Call Volumes

Forecasting Overview

Forecasts are predictions of future call volumes for specific periods based on historical call volumes. You can create forecasts in inContact WFM v1, and these 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, such as adding new clients, product changes that make the product easier to use, and so forth. 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.
- inContact WFM v1 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.

 You can print Forecast pages that have the Print icon.

Forecast Service

Upon initiating a forecast request, the inContact WFM v1 Forecast service compiles the forecast on your behalf, removing any need for you to monitor the process or provide further input. As a forecast initiator, this allows you to complete other tasks while the Forecast service does its job. When the Forecast service completes the forecast, inContact WFM v1 notifies you through an email, an SMS text, or both, depending on the notification options you chose for the specific forecast. Once you receive the notice, you can view the completed forecast, modify it as needed, and use it for scheduling.

This does not mean that the Forecast service provides no real-time status information, as it does. If you do not wish to view this information, you can simply navigate away to another page in inContact WFM v1 without disrupting the service. Status information the service displays is shown in a specific order and includes the following:

- **DST Check:** Checks to see if the prediction may be affected by Daylight Saving Time. If the check returns true, inContact WFM v1 presents a message box asking if you would like to offset the prediction for DST.
- **Initializing:** inContact WFM v1 is sending a request to launch the Forecast service.
- **Saving:** The Forecast service is saving the forecast results to the database.
- **Complete:** The Forecast service has completed its tasks.

In addition to the above, you may also see the following messages:

- **None:** This is a default status that indicates the web interface and the Forecast service are not communicating at the present time. This status should not be seen once a forecast has been initiated.

- **Stopping:** If you click Stop Forecast Generation, the Forecast service stops generating the forecast.
- **Error:** If an error occurs during the process, in either the web interface or the Forecast service, an error message is displayed and also entered in the Forecast service logs.

Import Data from a File

⚠ In inContact WFM v1, 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 (such as other imports or direct ACD integrations). Your inContact WFM v1 administrator should be aware of and involved with any data imports.

You can export call volume data from an ACD or another system, or manually enter data in Excel, and then import the data to inContact WFM v1 as a CSV (comma separated values) file. This method may be useful if a previously-used ACD does not integrate directly with inContact WFM v1 and you want to use data from that ACD.

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

- Create a generic device in inContact WFM v1 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 inContact WFM v1, 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 hhmmss.
- **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 includes a split not currently in the database, inContact WFM v1 creates a new Skill for that split name and number. Your inContact WFM v1 administrator can make the necessary adjustments.

Once the data has been imported, you can use it 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 Using Device Data

To select call volume data from the inContact PBX:

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** and **To** date fields and select dates on the calendar to load data between these dates.
4. Select one or more Labor Units from the list. Only the Labor Unit(s) with Skills that match skills on the inContact PBX are used in the forecast. For example, if a Labor Unit has three Skills and the PBX has two additional skills, only call data for the three skills in common will be pulled from the imported call history.
5. Click **Next**.

Create a Historical Call Volume Set 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.

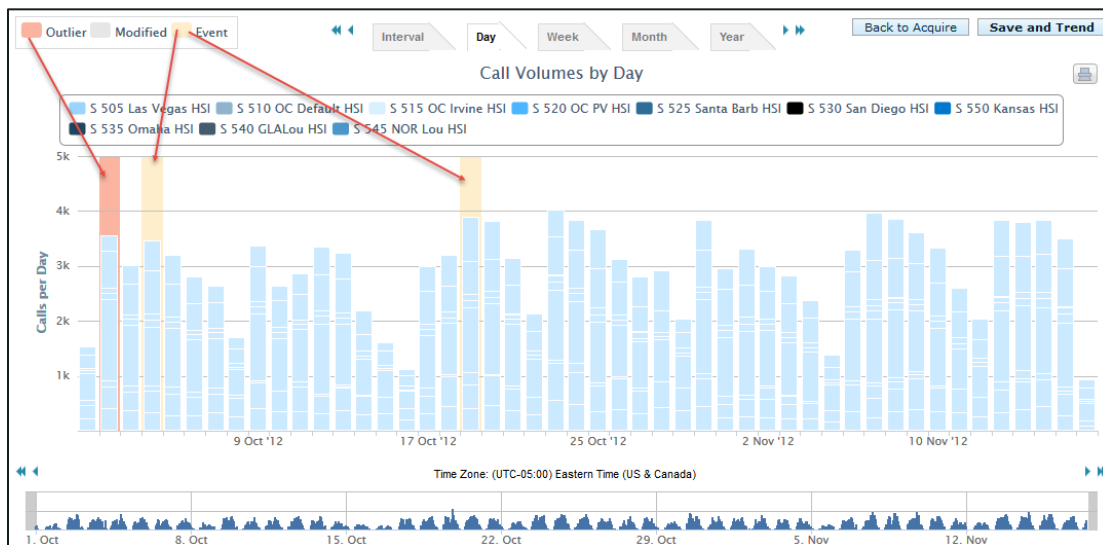
To create new call volume data set from an existing data set:

1. Click the **Forecast** tab and then click **Acquire**.
2. Click **Use existing acquired data set**.
3. Select the acquired set you want to use from the drop-down list.
4. Click **Next**.

Historical Call Volume Sets Overview

After a historical call volume data set is acquired, you can modify it. When inContact WFM v1 calculates trends, forecasts, and predictions, it considers time-of-day and recurring factors (such as 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.

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.

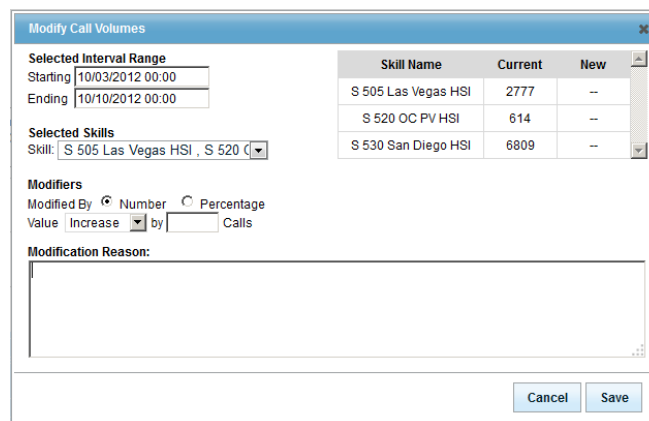


The way the data is displayed varies based on what data was imported. This example shows data imported from an ACD for one Labor Unit that contained multiple Skills. The call data display is organized using these items:

- **Skills key:** A Labor Unit's Skills appear preceding 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 want to view.
- **Arrow navigation buttons:** The < - and - > buttons change the data columns displayed (that is, either earlier or later data).

Manually Modify Data in a Historical Call Volume Data Set



| 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 (for example, 10% of 63 calls equals 6.3 calls, so the system would adjust by 7 calls).

To manually modify data in a displayed data set:

1. Click the applicable time unit tab.
2. Click the data column(s) 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 skills from the **Selected Skills** drop-down menu.
7. Select the **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. Type a comment under **Modification Reason** and then click **Save**.

When all modifications are complete and you are ready to use the data set:

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

Auto-Correct Selected Data in a Historical Call Volume Data Set

inContact WFM v1 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 in a Historical Call Volume Data Set](#) or let inContact WFM v1 auto-correct it. Auto-correcting adjusts the interval to the historical trend calculated by inContact WFM v1. Adjustments may be minor and difficult to see.

To auto-correct data in a displayed data set:

1. Click the applicable time unit tab.
2. Right-click the data column(s) to be modified and select **Auto-correct**.

When all modifications are complete and you are ready to use the data set:

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

Add Events to Data in a Historical Call Volume Data Set

Events can be seasonal, recurring, or one-time business events that 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, and so on.

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

1. Click the applicable 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 type a **Name** for the new type.
4. Type a **Comment** and click **Add**.

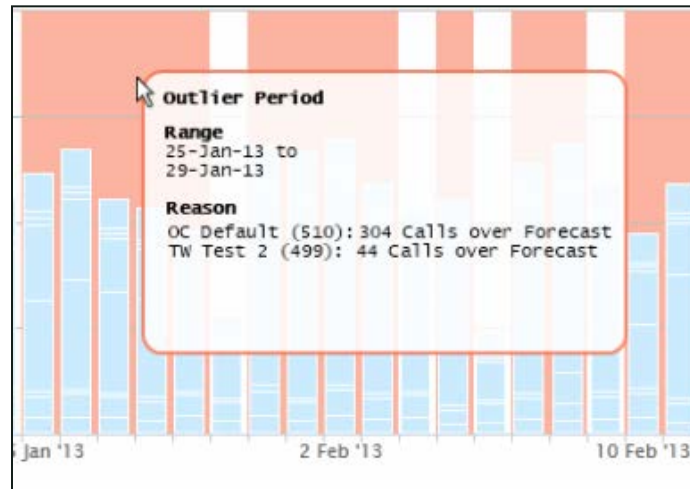
To clear an event from a single data column without affecting others on that level:

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

When all modifications are complete and you are ready to use the data set:

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

Auto-Correct Outliers in a Historical Call Volume Data Set



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, inContact WFM v1 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 (for example, 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 (for example, 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 within the **Calls per Day** graph and select **Auto-correct outliers**.

When all modifications are complete and you are ready to use the data set:

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

Undo/Revert Changes to a Historical Call Volume Data Set

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 and then click **Revert selected** to undo changes to only those columns, or click **Revert all** to undo all changes.

Predict Call Volume

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 the capabilities of inContact WFM v1 to predict the call volume.

Predicting the call volume lets you see the forecast inContact WFM v1 has generated, and make further modifications based on current knowledge and events that would not have been present in the historical data set.

The forecast model inContact WFM v1 uses to predict the number of calls for a time interval is based on the number and timing of intervals contained within the historical data set you select and falls in to one of following categories:

- **One Day to One Week:** Due to a lack of data for averaging, the prediction mirrors the provided historical intervals exactly.
- **One Week to Three Weeks:** The prediction provides a simple average of like intervals where there is more than one like interval. For example, if three calls arrived at 8:00 am on Monday of the first week and one call arrived at 8:00 am on Monday of the second week, the prediction for 8:00 am on Monday of the third week would be two calls.
- **Three Weeks to 12 Weeks:** The prediction provides a trend-adjusted average of like intervals. For example, the algorithm analyzes the historical data to identify the trend slope and adjusts the average of all like intervals by the observed trend. The trend is not adjusted for distance between the originated time series and the time series of the prediction.
- **12 or More Weeks:** The prediction provides a trend-adjusted prediction based on ratios of call arrivals as week to day intervals.

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.

i When the historical data set is in Standard Time and the prediction is for a period affected by Daylight Saving Time, that prediction can be offset by one hour to account for the change in caller behavior resulting from the time change. If you attempt to create a prediction that meets these criteria, inContact WFM v1 will notify you that the prediction occurs during such a period and will ask you if you would like to offset the data.

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 prediction type (forecast model) and click **Next**.
6. Modify the data if necessary.
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. Type a name for the forecast and click **Save**.

Modify Predicted Call Volume Data

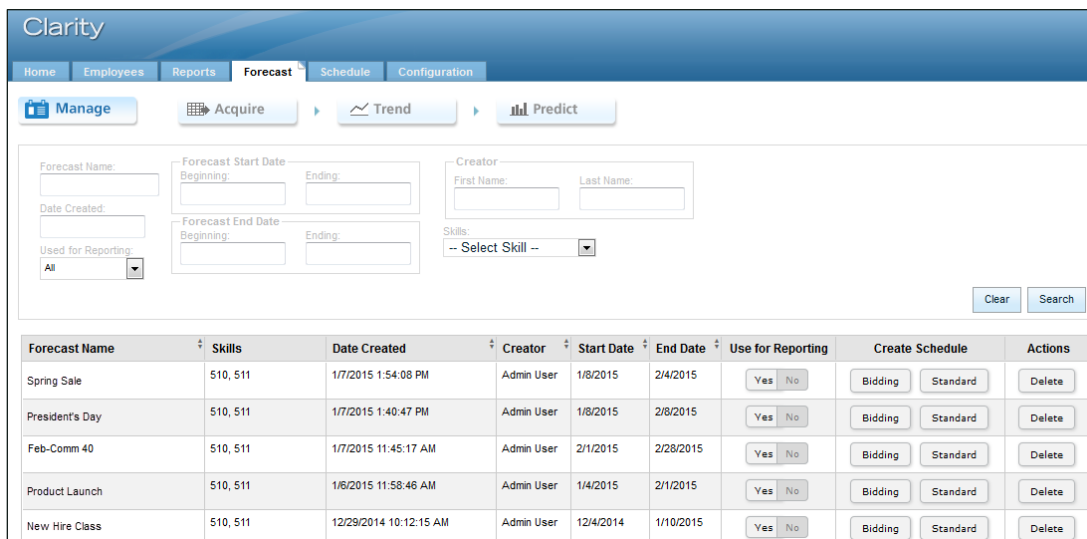
inContact WFM v1 displays forecasted call volume data with the same look and feel as historical data, and allows you to make many of the same modifications. For specific procedures, refer to:

- [Manually Modify Data in a Historical Call Volume Data Set](#)
- [Auto-Correct Selected Data in a Historical Call Volume Data Set](#)
- [Add Events to Data in a Historical Call Volume Data Set](#)
- [Auto-Correct Outliers in a Historical Call Volume Data 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, inContact WFM v1 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, and so on. 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**.

Search Call Volume 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 | 1/6/2015 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:** Type values in the First Name and/or Last Name fields.
- **Skills:** Select one or more checkboxes 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, inContact WFM v1 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 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 Call Volume 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 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 [Scheduling Employees](#) or [Using Schedule Bidding](#).

Delete a Call Volume Forecast

To delete a forecast data set:

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

Scheduling Employees

i This section deals with standard schedules. For information on creating and managing schedules that let agents bid for shifts they want, see [Using Schedule Bidding](#).

Scheduling Overview

There are three steps in the inContact WFM v1 scheduling process:

- **Load.** Create a "schedule entry", a named combination of forecast data (if applicable) 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 Basics](#).

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

- **Schedule Types.** inContact WFM v1 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, inContact WFM v1 will not generate a schedule for a partial week since the 40-hour requirement could not be met. Your inContact WFM v1 administrator controls these settings.
- **Pre-existing schedules.** inContact WFM v1 checks to see whether employees are already scheduled and generates a warning message if they are. However, if you continue with the new schedule, inContact WFM v1 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 inContact WFM v1 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 (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. For example, a 1:00 am to 9:00 am 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** DST 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.

inContact WFM v1 Scheduler Service

To help schedulers make better use of their time, the inContact WFM v1 Scheduler service generates 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, inContact WFM v1 identifies them. inContact WFM v1 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.

Depending on the number of employees being scheduled, the length of the schedule time period, and other factors, inContact WFM v1 may require some time to generate a schedule. If you choose to remain on the Schedule page while the Scheduler runs, inContact WFM v1 keeps you informed as the Scheduler moves through its various steps.

The steps typically seen in the Scheduler process are:

- **Checking Prereqs:** inContact WFM v1 is verifying that the criteria you've selected are acceptable for creating a schedule.
- **Initializing:** inContact WFM v1 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 inContact WFM v1 tasks while your schedule is being created. inContact WFM v1 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.

Manually-Created Schedules Overview

| 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. inContact WFM v1 will append the current date to this name.

You can enter hours and activities, 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 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 (that is, 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 (such as 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](#).

Manually Create a Schedule

Manually creating a schedule includes two sub-tasks.

Create a Schedule Entry for a Manual Schedule

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. Type a name for the schedule entry.
3. Click **No Forecast**.
4. Select one or more **Labor Units** and click **Next**.

Manually Create a Schedule

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

1. Click the **Schedule** tab and then click **Create** (skip this step if you are continuing from the Schedule Entry procedure).
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 week.
4. Double-click the employee's name to open a scheduling grid.
5. Use the arrow buttons and scroll bar to navigate to the time.
6. Type 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. Type a name for the schedule.
11. Click **Save**. See [Publish a Schedule](#) for additional steps.

If you don't want 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.

Automatically Generate a Schedule

Automatically generating schedules using the inContact WFM v1 Scheduler Service offers significant time savings. For more information on the Scheduler, see [inContact WFM v1 Scheduler Service](#). Automatically-generated schedules have up to three tabs in addition to **View Schedule**. For more information, see: [Overtime for Period Tab Overview](#), [Over/Under Staffing Tab Overview](#), and [Service Level Tab Overview](#).

There are two sub-tasks required to automatically generate a schedule. Before you begin, a call volume forecast must be created and designated for use (see [Forecasting Call Volumes](#)).

Create a Schedule Entry for an Automatically-Generated Schedule

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. Type 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

1. Click the **Schedule** tab and then click **Create** (skip this step if you are continuing from the Schedule Entry procedure).
2. Click **Generate a schedule** and select an entry from the drop-down list.
3. Type 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 inContact WFM v1 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 or Edit a Schedule](#).
6. Click **Save and Publish**.
7. Type a name for the schedule and click **Save**. See [Publish a Schedule](#) for additional steps.

If you don't want 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 or Edit a Schedule

Manually-created schedules are available as you work on them. To view an automatically-generated schedule:

- Click your **Home** tab and then click a schedule link in the **Scheduler** widget.

Alternative: remain on the Schedule page until the Scheduler service finishes.

View Schedule displays as the default tab view. For automatically-generated schedules, 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 (such as 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.

You can edit employee schedules by right-clicking 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](#), 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 [Add a Shift to Multiple Employee Schedules](#).

Overtime for Period Tab Overview

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, inContact WFM v1 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.

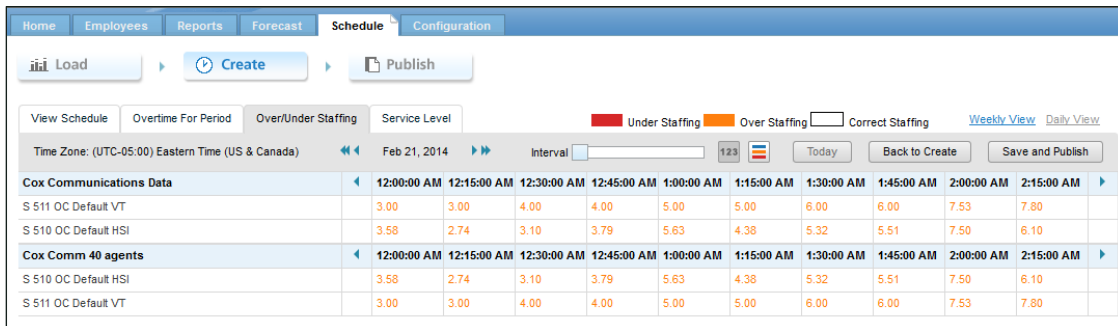
Over/Under Staffing Tab Overview

The **Over/Under Staffing** tab appears only with schedules that have been automatically generated using forecast data. The report on this tab lets you view either daily or weekly intervals and see whether this schedule shows you as overstaffed or understaffed, based on historical call data. The report does not run until you start it (see [Create an Over/Under Staffing Report](#)).

The algorithm for Over/Under calculations uses simulated call volume based on historical data and a specific schedule. inContact WFM v1 uses a fresh simulation for each report, so the same historical data can produce different Over/Under 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 inContact WFM v1 Support.



Over/Under Staffing reports let you easily see time periods to adjust so your schedule provides optimal, cost-effective coverage.

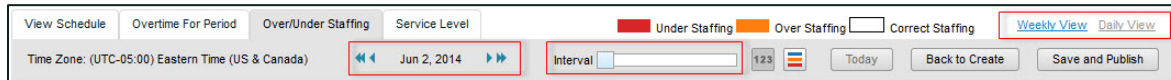




| | 12:00:00 AM | 12:15:00 AM | 12:30:00 AM | 12:45:00 AM | 1:00:00 AM | 1:15:00 AM | 1:30:00 AM | 1:45:00 AM | 2:00:00 AM | 2:15:00 AM |
|--------------------------------|-------------|-------------|-------------|-------------|------------|------------|------------|------------|------------|------------|
| 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 |

On the Over/Under Staffing tab:

- Data is grouped by Labor Unit and within Labor Unit, by Skill so you can easily determine the agents and schedules to change to positively impact 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 numerically based on fulltime equivalents (FTEs). This example 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 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 time increments for that day, click the  or  icons at either end of the blocks of time. To view other days, use the date selector.
- To see over/under information for the week, click **Weekly View**.
- You can move back and forth between your schedule and the Over/Under report by clicking the **View Schedule** and **Over/Under Staffing** tabs.
- To see the results of your adjustments, you must save changes to the schedule and then rerun the Over/Under report.

Saving a modified schedule discards any reports previously generated for that schedule. If you forget to save changes and you click the **Over/Under Staffing** tab, a warning message reminds you that the over/under report does not reflect your changes.

Create an Over/Under Staffing Report

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, inContact WFM v1 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 inContact WFM v1 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** as applicable.
2. Click **Yes**.
3. In the **Confirm** pop-up box, click **Wait**.

To access completed Over/Under Staffing reports:

- Click your **Home** tab and then click the report link under **Completed Predictive Schedule Reports** in the **Scheduler** widget. If necessary, you can add the **Scheduler** widget by clicking the **Add Widget** link on your **Home** screen.

Service Level Tab Overview

The **Service Level** tab appears only with schedules that have been automatically generated using forecast data. The report on this tab lets you view 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 inContact WFM v1 administrator. The report does not run until you start it (see [Create a Service Level Report](#)).



The algorithm for Service Level calculations uses simulated call volume based on historical data and a specific schedule. inContact WFM v1 uses a fresh simulation for each report, so the same historical data can produce different 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).

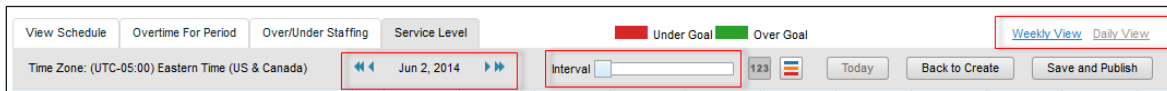
| | | | | | | | | | | | |
|---|---------------------|---------------------|---------------|---|-------------|--|----------------|------------------|------------|------------|------------|
| View Schedule | Overtime For Period | Over/Under Staffing | Service Level | <div><div></div> Under Goal <div></div> Over Goal</div> | | Weekly View Daily View | | | | | |
| Time Zone: (UTC-05:00) Eastern Time (US & Canada) | | Jun 2, 2014 | Interval | <input type="text" value="123"/> | | Today | Back to Create | Save and Publish | | | |
| Cox Communications Data | | 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% |



On the Service Level tab:

- 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. This example 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**.
- You can move back and forth between your schedule and the Service Level information by clicking the **View Schedule** and **Service Level** tabs.
- 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 discards any reports previously generated for that schedule. If you forget to save changes to your schedule and you click the **Service Level** tab, a warning message reminds you the service level report does not reflect your changes.

Create a Service Level Report

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, inContact WFM v1 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 inContact WFM v1 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** as applicable.
2. Click **Yes**.
3. In the **Confirm** pop-up box, click **Wait**.

To access completed Service Level reports:

- Click your **Home** tab and then click the report link under **Completed Predictive Schedule Reports** in the **Scheduler** widget. If necessary, you can add the **Scheduler** widget by clicking the **Add Widget** link on your **Home** screen.

Published Schedules Overview

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. inContact WFM v1 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:** Employees must have an email address specified on their inContact WFM v1 account. The email message subject will tell them they have been scheduled, and the message body will list the scheduled shift times. If there are any email failures, inContact WFM v1 will display an error message telling you which users were not notified.
- **Twitter:** Your inContact WFM v1 administrator must set up and configure a Twitter site for use with inContact WFM v1. The tweet will be "Schedule published!"
- **Facebook:** Your inContact WFM v1 administrator must set up and configure a Facebook site for use with inContact WFM v1. The posting will be "Schedule published!"
- **SMS:** Users must have text-message capable mobile phones. Their mobile phone information must be entered in their inContact WFM v1 accounts, and the "Enable SMS" checkbox must be selected. The SMS message will simply tell them they have been scheduled.

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.

i Approved leave requests do not show on published schedules but can be seen elsewhere. For details, see [Leave Requests Overview](#).

Publish a Schedule

To publish a schedule:

1. On your **Home** tab, click the link to the applicable schedule in the **Scheduler** widget.
2. Click **Save and Publish**.
3. Rename the schedule (optional).
4. Select the schedule from the dropdown list.
5. Select a notification method (optional) 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 [View or 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 (optional) 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 as a comma-separated values (CSV) file if needed. To export a schedule:

1. On your **Home** tab, click the link to the applicable 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.

Using Schedule Bidding

i This section is for workforce and application administrators who are implementing the Schedule Bidding feature in their inContact WFM v1 system. Agents who want to bid on schedules should refer to [Bid for Schedules](#).

Schedule Bidding Overview

The Schedule Bidding feature adds flexibility and functionality to the inContact WFM v1 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, inContact WFM v1 provides a means for ranking agents. Workforce administrators can use inContact WFM v1 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 inContact WFM v1.
- Workforce administrators control the period of time during which schedules are available for bidding.
- Through inContact WFM v1 permissions, application administrators can control which employees are able manage Schedule Bidding, and which agents are allowed to bid on schedules.

inContact WFM v1 Agent Ranking Criteria Overview

inContact WFM v1 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 inContact WFM v1, this field is used as an indicator of agent tenure or seniority. However, it will not consistently mirror agent tenure for a number of reasons: agents may be rehired and/or their inContact WFM v1

Criteria:

☐ User Account Age

0 %

☐ Average Handle Time

0 %

☐ QA Score Average

0 %

Start Date

End Date

Cancel
Save

accounts reinstated; agents may have been hired prior to inContact WFM v1 implementation, and so forth.

- **Average Handle Time (AHT):** This field can be used when inContact WFM v1 is integrated to a PBX that provides this statistic.
- **QA Score Average:** This field can only be used with combined inContact WFO/inContact WFM v1 systems in which inContact WFO Quality Management is used to evaluate agents.

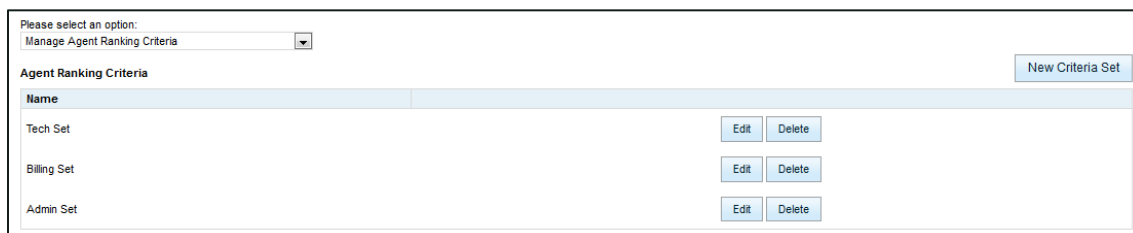
In addition to selecting criteria to be used, you can also determine the period from which criteria will be determined and the weight percentage associated with each criteria item. The total weight for all selected criteria must equal 100%.

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, inContact WFM v1 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, inContact WFM v1 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

| Name | |
|-------------|-------------|
| Tech Set | Edit Delete |
| Billing Set | Edit Delete |
| Admin Set | Edit Delete |

New Criteria Set

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. Type 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 want to use and assign weights if applicable.
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 applicable 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 set instead of Edit. The set is permanently deleted after you click **OK** in the warning message dialog box.

Imported Agent Ranking Criteria Overview

If you prefer to use your own agent ranking criteria instead of those built into inContact WFM v1, you can import agent ranks. You will first need to create a comma-separated values (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; inContact WFM v1 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 inContact WFM v1 is completed for each employee in the file. If inContact WFM v1 cannot match an employee in your file to an inContact WFM v1 user, it

will not import that row. inContact WFM v1 will preview the file for you, along with any warning or error messages, so you can correct any issues prior to the actual import.

| Preview Imported Rankings | | | | Back | Import |
|---|----------------|-------------|---------------|------|--------|
| ▼ Warning Messages (1) | | | | | |
| ⚠ Row 7 : A User does not exist for Employee ID: 67890. This row will not be imported | | | | | |
| Row | Employee Name | Employee ID | Employee Rank | | |
| 2 | Sheryl Coscia | 5009 | 1 | | |
| 3 | Kevin Dimetrik | 5707 | 2 | | |
| 4 | Neil Bern | 5709 | 3 | | |
| 5 | Zach Halti | 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 inContact WFM v1. Imported ranks are clearly identified as such. You cannot edit imported agent ranks in inContact WFM v1. 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 Ranking Criteria

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. Type a meaningful **Name** for the criteria set so you can easily identify it.
5. Click **Browse**, navigate to the 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 Schedule Overview

There are five steps in the inContact WFM v1 process for Bidding Schedules:

- **Load.** Create a "schedule entry", a named combination of forecast data (if applicable) 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 applicable), 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.** inContact WFM v1 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, inContact WFM v1 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 inContact WFM v1 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 inContact WFM v1 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 Overview

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 (that is, 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, and so on) 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 | | | | | | |
| <div>Back</div> <div>Save</div> <div>Save and Initiate</div> | | | | | | |
| 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

Manually creating a bidding schedule includes two sub-tasks.

Create a Schedule Entry for a Manual Bidding Schedule

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. Type a meaningful **Name** for the Schedule Entry.
5. Click **No Forecast**.
6. Select the **Labor Unit(s)** for this schedule and click **Next**.

Create a Bidding Schedule

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 your schedule in the blank scheduling grid.
6. Click **Save** or **Save and Initiate**.

i 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 want 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 Overview

i Automatically-generated Bidding Schedules use the inContact WFM v1 forecasting functionality as well as the inContact WFM v1 Scheduling Service. For additional information, see [Forecasting Call Volumes](#) and [inContact WFM v1 Scheduler Service](#).

inContact WFM v1 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, inContact WFM v1 identifies them. inContact WFM v1 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.

When the schedule is ready, it displays on the **View Schedule** tab as pictured here. Hours appear in 24-hour format. Non-consecutive shifts (for example, 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.

| View Schedule | | | | | | |
|--|-------------|-------------|-------------|-------------|-------------|-----------|
| Time Zone: (UTC-05:00) Eastern Time (US & Canada) | | | | | | |
| Jun 1 – Jun 7, 2014 | | | | | | |
| <input type="button" value="Back"/> <input type="button" value="Save"/> <input type="button" value="Save and Initiate"/> | | | | | | |
| 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.

Automatically Generate a Bidding Schedule

Automatically generating a bidding schedule includes two sub-tasks.

Create a Schedule Entry for an Automatically-Generated Bidding Schedule

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. Type a meaningful **Name** for the Schedule Entry.
5. Click **Select Forecast** and choose the applicable 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.

Generate a Bidding Schedule

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. Type 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 inContact WFM v1 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**.

i 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 want 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 applicable schedule.
4. Edit the schedule as needed.
5. Click **Save** or **Save and Initiate**.

i 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 want 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 applicable 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

Hide Awarded

Save

Publish

Award Bidding Schedules

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 disabled 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 applicable schedule.
3. Select a **Criteria Set** from the drop-down list (optional) and click **Apply**.
4. Click **Award** next to a 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 applicable schedule.
3. Click **Select** next to the agent(s) whose shift(s) you want to change.
4. Click **Undo Award** and then click **Save**.

Published Bidding Schedule Overview

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 Basics](#).

inContact WFM v1 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, inContact WFM v1 will take you to the Publish Schedule page but your schedule will not be available in the drop-down list of schedules. inContact WFM v1 will also warn you if the schedule results in any Labor Rule violations, and give you the opportunity to override the rules.

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

i Approved leave requests do not show on published schedules but can be seen elsewhere. For details, see [Leave Requests Overview](#).

Publish Bidding Schedule Awards

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 applicable **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 schedule from the drop-down list.
8. Select the checkbox for one or more notification method(s) (optional) 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 Overview

For each Bidding Schedule, you define the period of time during which agents can bid for the shifts they want. 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 inContact WFM v1 administrator.
- **Facebook:** The Facebook feed integration must be configured by your inContact WFM v1 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 applicable schedule.

4. Type the **Start Date** and **End Date** for the Bidding Period.
5. Select the checkbox 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 (that is, 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 applicable schedule.
4. Type the new **End Date** for the Bidding Period.
5. Select the checkbox for one or more **Notification Options** and then click **Close**.

Document Revision History

| Revision | Change Description | Effective Date |
|----------|----------------------------------|----------------|
| 0 | Initial version for this release | 2016-03-01 |