



**inContact Workforce  
Management v2**

**Agent Workstation  
Web Site User Manual**

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[www.incontact.com](http://www.incontact.com)

# inContact WFM v2 Agent Workstation Web Site User Manual

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# Table of Contents

1. Overview .....	5
1.1. Browser Requirements .....	5
2. Home Page Features .....	5
2.1. Login .....	5
2.2. Announcements .....	6
2.3. Links.....	7
2.4. Documentation .....	7
2.5. Contacts.....	7
2.6. Change Password .....	8
2.7. Log out .....	8
3. Schedule Bidding .....	8
3.1. Manage Schedule Bid Periods.....	9
3.2. View Schedule Bid Period .....	9
3.2.1. Schedule Preferences .....	10
3.2.1.1. Creating a Favorite .....	10
3.2.1.2. Creating a Least Favorite.....	11
4. Buddy Groups .....	11
4.1. Create a Buddy Group.....	12
4.1.1. Invite Agents to Your Buddy Group.....	12
4.1.2. Deleting a Buddy Group .....	12
4.1.3. Accepting an Invitation .....	12
4.2. Buddy Group Preferences .....	13
5. Vacation Bidding .....	13
5.1. Vacation Bid Periods .....	13
5.2. View Vacation Bid Period .....	14
5.3. Enter Vacation Bid Choices .....	14
6. My Profile .....	15
6.1. Manage Contact Information .....	15
6.2. My Preferences .....	16
6.3. My Assignments.....	16
6.3. My Skill Assignments .....	17
7. Analytics .....	17
7.1. Dashboards .....	17
7.1.1. Configuration.....	17
7.1.2. Dashboard.....	18
7.2. Scorecards .....	18

7.2.1. Performance .....	19
7.2.2. Adherence .....	19
7.3. Reports .....	19
8. Adherence .....	20
8.1. My Scorecard .....	20
8.3. Adherence Scorecard .....	21
9. Calendar .....	21
9.1. My Calendar .....	21
9.1.1. Weekly Summary .....	22
9.1.2. Calendar View .....	23
9.1.3. View Schedule .....	23
9.1.4. Email .....	24
9.1.5. Enter Exceptions .....	24
9.1.6. View Exceptions .....	25
9.1.7. Swap Shifts .....	25
9.2. Swap Shifts .....	26
9.2.1. Swap Requests .....	26
9.2.2. Swap Proposed to Me .....	26
9.2.3. My Swap Requests .....	27
9.2.4. My Swap Proposals .....	27
9.2.5. Available Shifts .....	27

# 1. Overview

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The WFM v2 Agent Workstation Website, which will be referred to simply as the Website, is the user interface providing access to all of its functionality. It allows users to manage performance, work and off times during the course of an operating day.

The purpose of this User Manual is to provide a comprehensive description of the WFM v2 Agent Workstation Website. The AWO Agent Workstation empowers agents and management to manage schedules, exceptions, overtime, volunteer time off (VTO), and other activities. There are two classes of users who are accommodated in the Website. They are as follows:

- **Managers/Administrators:** These users are responsible for administering the Website, including configuring settings common to all Environments, and managing and creating users. These users are also able to manage performance, real-time adherence (RTA), schedule meeting, training or other off-phone activities, approve or reject exception requests, and manage agent schedules. Managerial or admin user roles with different functional and organizational scope can be created by clicking the *Roles* link under the Administrator tab in the AWO Portal.
- **Agents:** These users can access their Home page to view announcements and messages posted by their admins, change password, view their schedules, enter exception requests, volunteer for overtime or time off (VTO), swap shifts with other agents, participate in shift and vacation bids, and view their performance.

This document is organized by Website feature. The privileges of each user class are defined within the outline for each feature.

## 1.1. Browser Requirements

Refer to online help for the inContact WFO suite (including inContact WFM v2) for current browser support. In addition, cookies must be enabled for the application's authentication to function properly.

## 2. Home Page Features

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The *Home* page, which is displayed by default upon first access to the Website, is shown in Figure 2.1. Once a user first accesses the Website, the *Home* page the *Home* page contains the Login module, and other public modules.

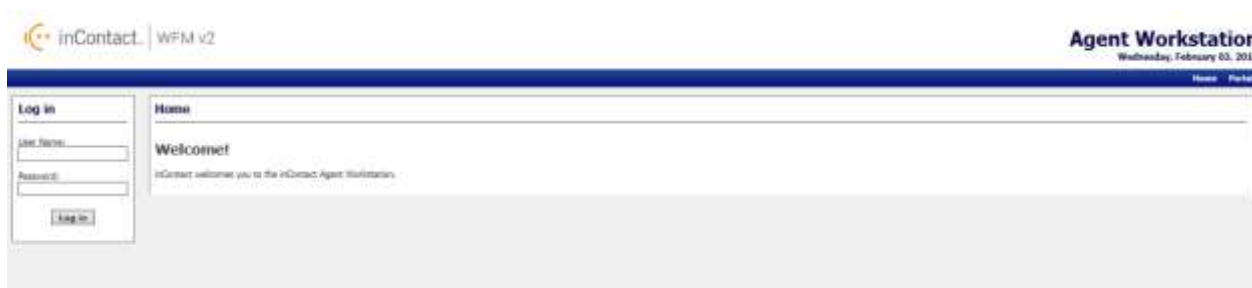


Figure 2.1 Home Page with Login Module

### 2.1. Login

A user can gain access to the secure portions of the Website by logging in using the *Account Login* module located on the left side of the *Home* page. Checking the *Remember Login* check box will cause the user name to be populated automatically the next time the user accesses the Account Login module from the same workstation. To access the secure content in the Website, a user must enter his or her user name into the *Username* box, and password into the *Password* box, and press the *Login* button. A message will

be displayed in the Account Login module if the user is unable to login. Login may fail for the following reasons:

- The user name or the password is incorrect. Please verify both the user name and the password. For security reasons, the system will not inform a user whether the user name or password is invalid, just that login has failed. If a user has forgotten his or her password, an Administrator can reset the password to a new value.
- An Administrator has temporarily closed the site. In this case, the message will provide the cause of the failure to login.
- A system error is preventing logging in. If multiple attempts have been made to login, including having an Administrator reset the user's password, or several users are not able to login, there may be a system error. This is an unlikely event, and would most likely be related to an incorrect installation or configuration, or a physical problem with one or more of the servers (for instance, a power failure). Contact an Administrator or other support person if this happens.

The features available to a user after logging in to the Website depend on the class or access level of the user. These include the items that appear in the drop-down menu bar. Additional sections below describe the features available through these menu items.

Once a user has successfully been authenticated and logged into the Website, the *Home* Page will reappear, with additional modules enabled as shown in Figure 2.2.

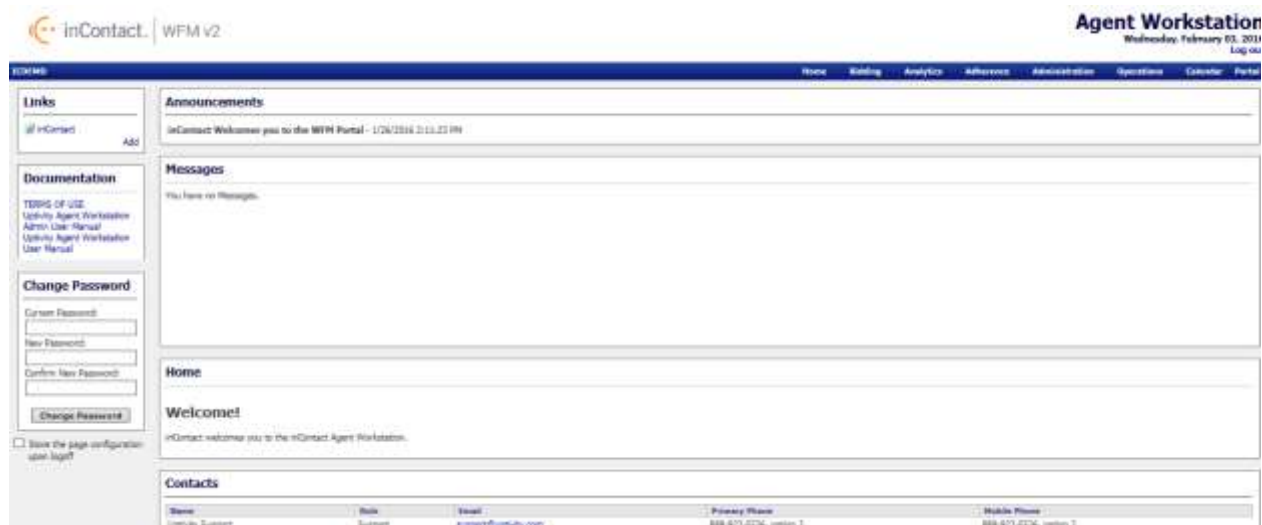


Figure 2.2 – Home Page for Authenticated Users

## 2.2. Announcements

The *Announcements* module on the Homepage provides important information delivered by the system Administrators as shown in Figure 2.3. The most recent announcements will appear at the top of the block.

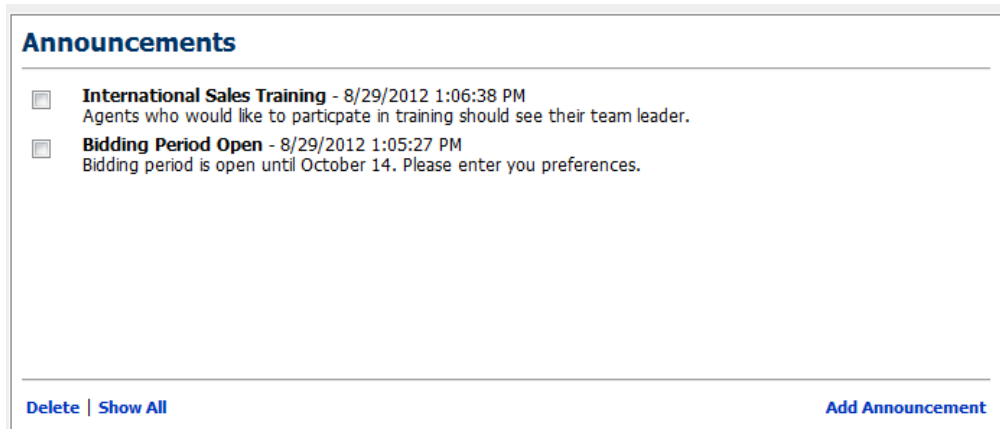


Figure 2.3 – Announcements

## 2.3. Links

The *Links* block provides useful hyperlinks that the system Administrator has created. Clicking on these links will open the website in a new window. If there is a website to be listed here, speak with your Administrator.

## 2.4. Documentation

The *Documentation* block provides a link to the Website User Manual providing information about various features provided by the Website as shown in Figure 2.4. The Administrator may also provide other relevant reference documents in this block.

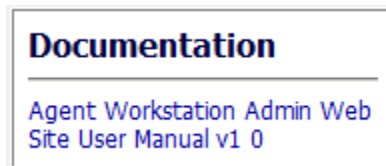


Figure 2.4 - Documentation

## 2.5. Contacts

The *Contacts for Information* module allows the user to add contact information that is shared by all users of the site as shown in figure 2.5. This is simply a convenient common place that users can collect names with email addresses and telephone numbers.

Figure 2.5 - Contacts

## 2.6. Change Password

The *Change Password* module enables the user to change his or her password. To select a new password, first, enter the existing password in the *Current Password* field. Next, enter the new password in the *New Password* field, and again in the *Confirm New Password* field. A message will appear in the *Change Password* module to either confirm that the password has been changed successfully, or to notify the user of the reason for the password not being changed. The password change may be unsuccessful if the current password does not match the password in the database, the new password is blank, or the new password and the confirm password do not match.

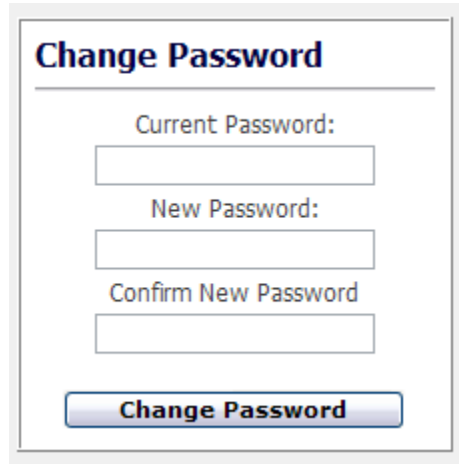
The image shows a web form titled "Change Password". It contains three input fields: "Current Password:", "New Password:", and "Confirm New Password:". Below the fields is a blue button labeled "Change Password".

Figure 2.6 – Change Password

## 2.7. Log out

The *Log out* link appears not only on the *Home* page, but also on all pages, regardless of the access level of the user as shown in Figure 2.7. A user's authenticated session begins when he or she logs in to the site. This authenticated session ends when the user selects the *Log out* link. Closing the browser without logging off also ends the session, but is not the preferred method. Session authentication control in the Website is supported by encrypted HTTP cookies. These cookies are configured to expire when the browser is closed. When a user selects the *Log out* link, however, these cookies are programmatically deleted, which is the most reliable way to ensure that they do not last beyond the user's session.

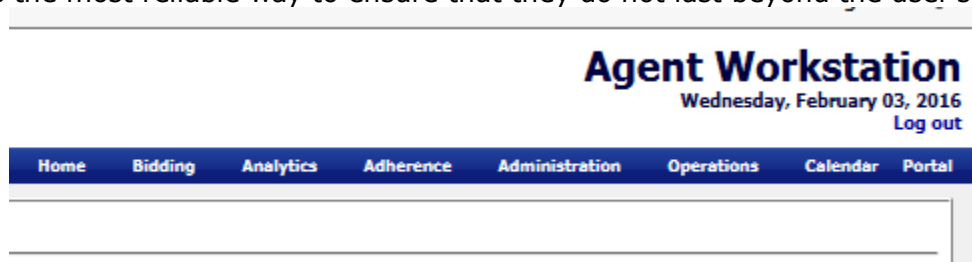


Figure 2.7 – Log out

## 3. Schedule Bidding

The *Schedule Bidding* module is used to bid on future schedules by agents when the Administrator has opened a Schedule Bid Period. This module is accessed by clicking on the *Schedule Bidding* link on the *Bidding* drop-down menu as shown in Figure 3.1.



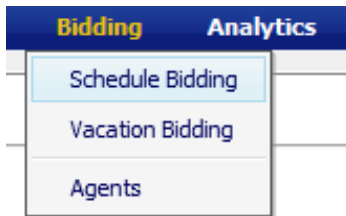


Figure 3.1

### 3.1. Manage Schedule Bid Periods

The *Manage Schedule Bid Periods* page displays Past Bid Periods and Current Bid Period information as shown in Figure 3.2. The Administrator may setup any number of Schedule Bid Periods allowing different bidding groups to bid at different times. A schedule bid period will span a specific period of time as defined by *Bid Start Date* and *Bid End Date*. To bid on schedules during this period, the user should click on the *View* icon in the corresponding row.

Schedule Bid Periods						
Current Bid Periods						Page: 1   Records Per Page: 25
Bid Period Name	Award Type	Status	Created Date	Bid Start Date	Bid End Date	Action
Past Bid Periods						Page: 1   Records Per Page: 25
Bid Period Name	Award Type	Status	Created Date	Bid Start Date	Bid End Date	Action

Figure 3.2 – Schedule Bid Periods

### 3.2. View Schedule Bid Period

Clicking the *View* icon displays the View Schedule Bid Period as shown in Figure 3.3.

#### View Schedule Bid Period

Back to Schedule Bid Periods

**Bid Period Details**

Bid Period: **Demo Nov. 9**

Period Start Date: **1/1/2007**

Period End Date: **3/31/2007**

Schedule Preferences

Buddies

Buddy Group Preferences

Schedule Preferences				
Category	Schedule ID	Description	Available	Action
[+] Favorites (0)	...			
[+] Remaining (14)	...			
[+] Least Favorites (0)	...			

Figure 3.3 – View Schedule Bid Period

### 3.2.1. Schedule Preferences

This tab displays three categories: Favorites, Remaining and Least Favorites. These categories are used for prioritizing schedule choices. When the page is first reached all schedules available for bidding are shown in the Remaining list as shown in Figure 3.4.

Schedule Preferences				
Category	Schedule ID	Description	Available	Action
[+] Favorites (0) ...				
[-] Remaining (14)				
	12737	12:00 AM (9:00) TuSa	1	  
	12738	12:00 AM - 12:15 AM (9:00) TuSa	1	  
	12739	12:00 AM - 4:30 AM (9:00) FSu	1	  
	12740	12:00 AM - 5:00 AM (9:00) FSu	1	  
	12741	5:00 AM - 6:45 AM (9:00) MW	1	  
	12742	5:00 AM - 8:30 AM (9:00) MTh	1	  
	12743	8:30 AM - 9:00 AM (9:00) WSa	1	  
	12744	10:00 AM (9:00) ThF	1	  
	12745	10:00 AM - 1:30 PM (9:00) MSu	1	  
	12746	10:00 AM - 10:15 AM (9:00) TuSu	1	  
	12747	3:00 PM (9:00) TuW	1	  
	12748	3:00 PM - 5:00 PM (9:00) FSa	1	  
	12749	3:00 PM - 7:00 PM (9:00) MSu	1	  
	12750	3:30 PM - 7:00 PM (9:00) TuTh	1	  
[+] Least Favorites (0) ...				

Figure 3.4 – Schedule Preferences

#### 3.2.1.1. Creating a Favorite

To move schedule choices into the *Favorites* category click the Green Check Mark icon. Once a schedule is in the *Favorites* category, the user can change the priority by using the Up and Down arrows or remove a schedule choice by clicking on the *Remove* icon as shown in Figure 3.5. Once schedules are entered into the Favorites category and ordered, the agent does not need to take any further step to save the Favorites category. The last Favorites order existed in the *View Schedule Bid Period* page before a Schedule Bid period closes is the order considered for that agent.

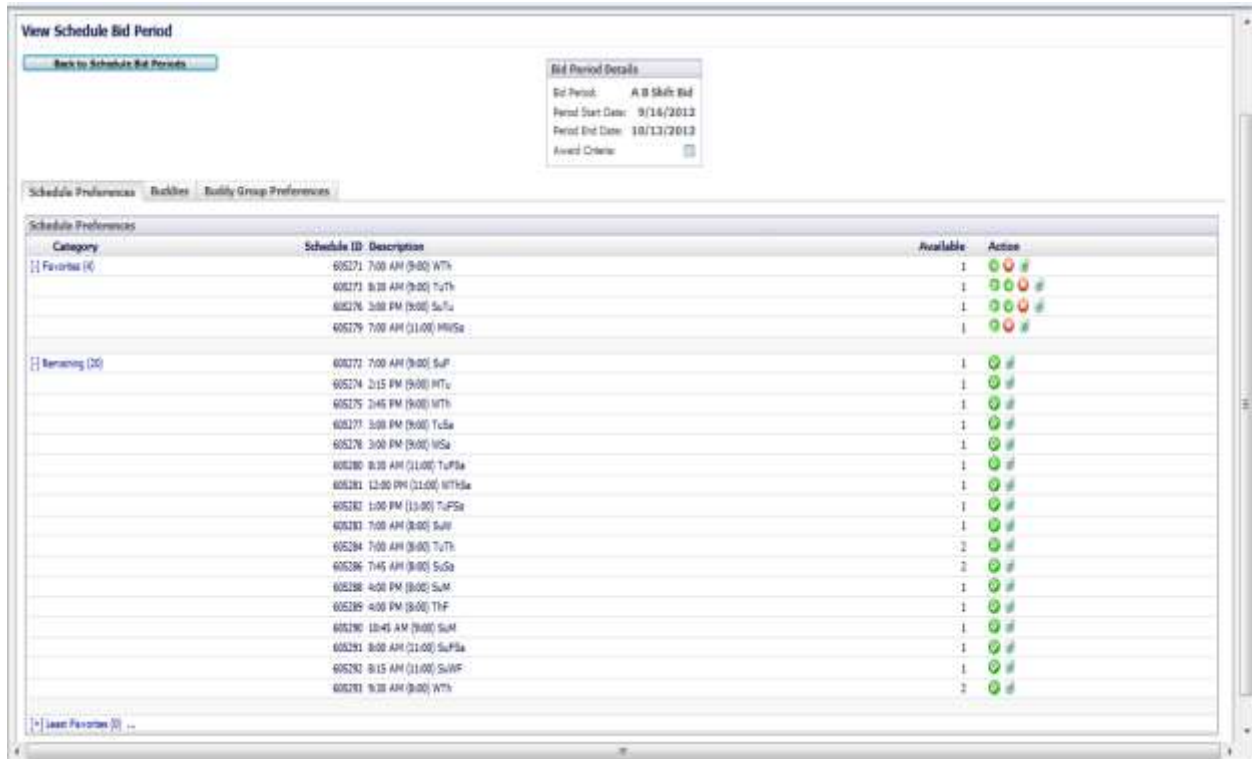


Figure 3.5 – Favorites

### 3.2.1.2. Creating a Least Favorite

To move a schedule choice to the *Least Favorite* category, click the *Trash* icon. The selection will be moved to Least Favorites as shown in Figure 3.6. Once schedules are entered into the Favorites category and ordered, the agent does not need to take any further step to save the Least Favorites category. The last Least Favorites order existed in the *View Schedule Bid Period* page before a Schedule Bid period closes is the order considered for that agent.

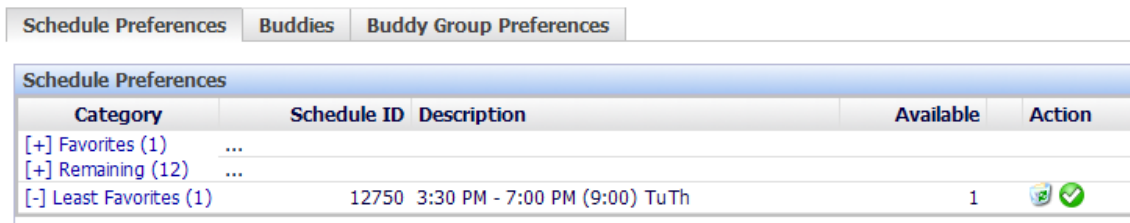


Figure 3.6 – Least Favorites

## 4. Buddy Groups

*Buddy Groups* give the opportunity for multiple agents to bid on like schedules together. There must be a minimum of like schedules in each group selections to match the number of agents in the buddy bid group before they will be awarded. The buddy group is assigned the lowest ranking score of the agents in the group. If no schedules can be awarded to the buddy group as a whole due to their preferences or low group score, the group is voided, agents in the group are evaluated as individuals and awards are re-processed from the beginning.

## 4.1. Create a Buddy Group

Click on the *Buddies* tab on the *View Schedules Bid Period* page. Click on the *Create a Buddy Group* link as shown in Figure 4.1.

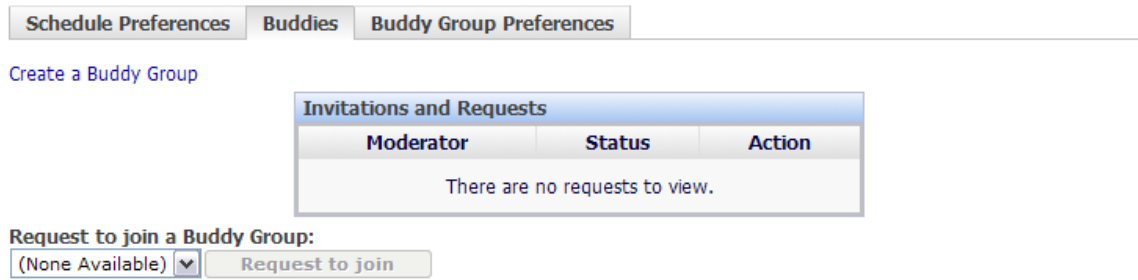


Figure 4.1 – Create a Buddy Group

### 4.1.1. Invite Agents to Your Buddy Group

Click on the *Invite* button and select the agents the user wants to invite as shown in Figures 4.2.



Figure 4.2 – Buddy Invite

### 4.1.2. Deleting a Buddy Group

To close/delete the buddy group under the Action column click on the *Close group* link as shown in Figure 4.3.



Figure 4.3 – Closing a Buddy Group

### 4.1.3. Accepting an Invitation

When an agent has been invited to join a buddy group they must "Accept" or "Reject" the invitation. In order to Accept or Reject an invitation, the agent must login to the Website, click on the Bidding – *Schedule Bidding – View* icon and the *Buddies* tab as shown in Figure 4.4.



Figure 4.4 – Accepting an Invitation

## 4.2. Buddy Group Preferences

Once the Buddy Group has been created and members accepted then the Controller can enter schedule choices for the group by selecting the *Buddy Group Preferences* tab as shown in Figure 4.5. There must be a minimum of like schedules in each group selections to match the number of agents in the buddy bid group before they will be awarded. This is done the same way as it is for an individual agent (see section 3.2.1.) If no members have been accepted a message will be displayed as shown in Figure 4.6.



Figure 4.5 Buddy Group Schedule Preferences

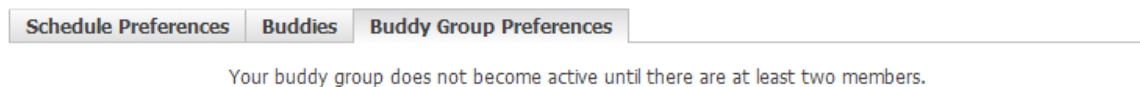


Figure 4.6 – No Members

## 5. Vacation Bidding

The *Vacation Bidding* module is used to bid on vacations in the future when the Administrator has opened a Vacation Bid Period. This module is accessed by clicking on the *Vacation Bidding* link on the *Bidding* drop-down menu as shown in Figure 5.1.



Figure 5.1

### 5.1. Vacation Bid Periods

The *Manage Vacation Bid Periods page* displays Past Bid Periods and Current Bid Period information as shown in Figure 5.2. The Administrator may setup any number of vacation Bid Periods allowing different bidding groups to bid at different times. A vacation bid period will span a specific period of time as

defined by *Bid Start Date* and *Bid End Date*. To bid on vacation during this period, the user should click on the *View* icon in the corresponding row.

Vacation Bid Periods					
Bid Period Name	Award Type	Created Date	Bid Start Date	Bid End Date	Action
CS Vacation Bid 2013	Vacation	9/4/2013	1/1/2013	12/31/2013	

Figure 5.2 – Vacation Bid Periods

## 5.2. View Vacation Bid Period

Once the user has clicked the *View* icon from the *Vacation Bid Periods* page, the *View Vacation Bid Period* page will open as shown in Figure 5.3. This page is used to enter bid choices for the vacation period. The page is comprised of three major areas: Bid Period Details, Navigation Calendar and Bid Management. Vacation allotments displayed are the number of vacation slots available for agents to be on vacation in a week.

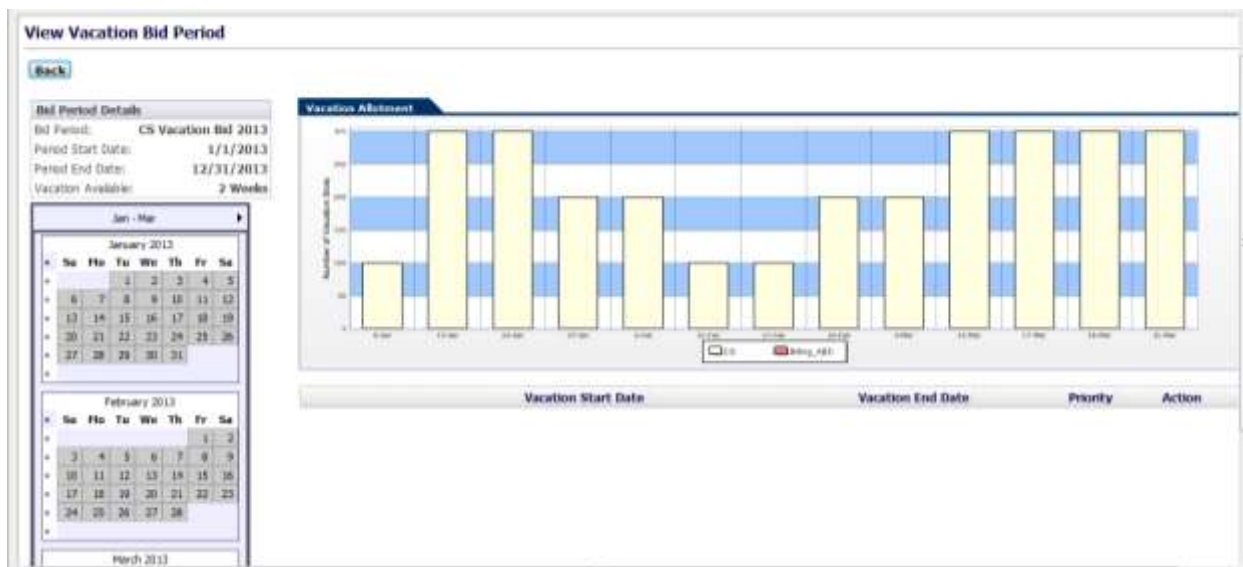


Figure 5.3 View Vacation Bid Period

## 5.3. Enter Vacation Bid Choices

To Enter Vacation Bid choices, an agent should click on the double arrows to the left of the vacation week choice in the Navigation Calendar box. Choices will be listed in the Bid Management box as shown in Figure 5.4. To change the priority order of a choice, the agent should use the green up and down arrows on the row to change, and to delete a choice, click on the *Delete* icon. Once the vacation week preferences are entered and ordered, the agent does not need to take any further step to save them. The last order existed in the *View Vacation Bid Period* page before a Vacation Bid period closes is the order considered for that agent.

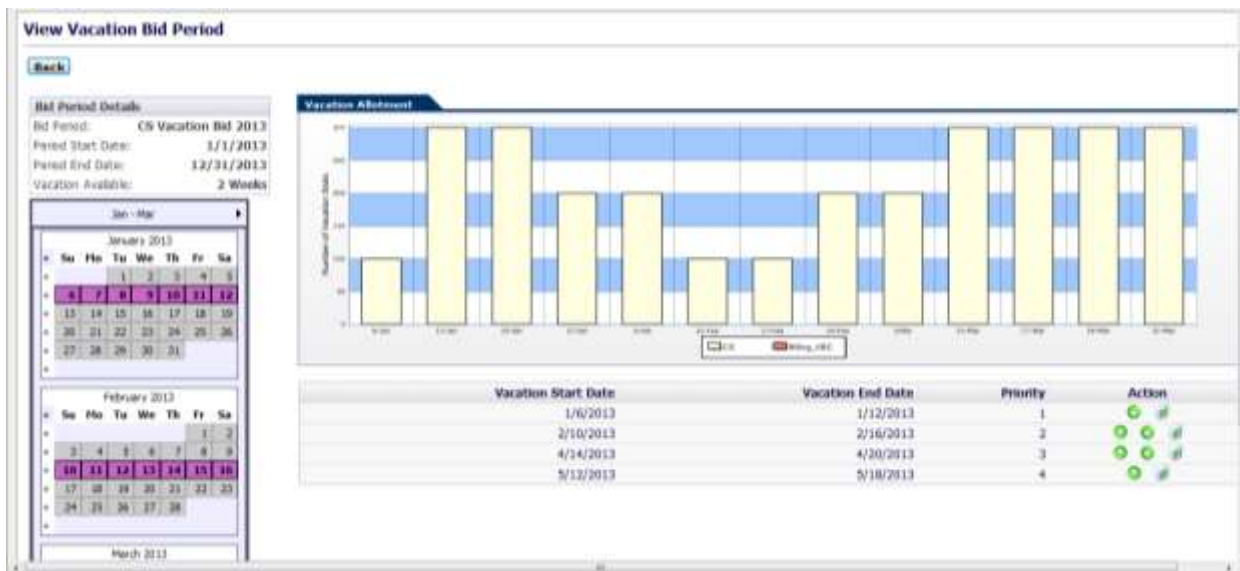


Figure 5.4 – Enter Vacation Bid Choices

## 6. My Profile

The *My Profile* module enables the user to view his/her information, and to manage preferences and contact information within the System. Every agent belongs to an Organizational Unit, has skills to perform certain duties, and is available to perform these duties during certain times. Each active agent is assigned a Tour Group (weekly work pattern) and a Shift Template (daily work pattern). This module is accessed by clicking on the *My Profile* link on the *Bidding* drop-down menu as shown in Figure 6.1.



Figure 6.1

### 6.1. Manage Contact Information

The *My Profile* module displays agent information which has been configured within the system as shown in Figure 6.2. Some fields such as First Name, Last Name, Seniority Date, HT ID, ACD Login ID, and Management Level are read-only fields displaying information within the System. The user can update contact information including Telephone Number, SMS and Email addresses and then click on the *Save* button to store the updated information within the System.



Last Name:	ATL Support 4x11 1	Seniority Date:	7/5/1991 12:00:00 AM
First Name:		Telephone 1:	(800) 555-1212
Team Lead:	(None)	Telephone 2:	(800) 555-1212
HR ID:	71448	SMS:	3005551212@txt.atc.r
Email Address:	atl_support@ac2sol	PrimarySkillCount:	
Date Created:	10/1/2009 03:00 PM	Adherence:	
Date Modified:	11/6/2009 11:01 AM	Customer Satisfaction Index:	
Management Level:	None	ACD Login ID:	

Figure 6.2 - Manage Contact Information

## 6.2. My Preferences

The *My Preferences* tab of the *My Profile* module provides functionality to enter or edit the user's Weekly and Daily Preferences as shown in Figure 6.3. To edit any of these fields, the user should select from the drop-downs under Start Time and End Time. To add a new date range, enter the date range and click on the *Add New Date Range* button. To delete a date range, check the box to the left of the row(s) to delete and click on the *Delete* button. After entering changes in his/her preferences, the user should click on the *Save* button to update the information within the System.

Date	Start Date	End Date	Day of Week	Start Time	End Time
<input type="checkbox"/>	Default	Default	Sunday	Prefer to Work	00:00 - 00:00
			Tuesday	Prefer to Work	00:00 - 00:00
			Wednesday	Prefer to Work	00:00 - 00:00
			Thursday	Prefer to Work	00:00 - 00:00
			Friday	Prefer to Work	00:00 - 00:00
			Saturday	Prefer to Work	00:00 - 00:00
<input type="checkbox"/>	6/5/2010	6/30/2010	Monday	Prefer to Work	00:00 - 17:00

Figure 6.3 – My Preferences

*Warning: Agent preferences are needed when auto-bidding feature is used to assign schedules to agents. The auto-bidding process makes an attempt (but does not guarantee) to assign a schedule to each agent within his/her preferred times. Therefore, it is important for agents to maintain their preferences within the System.*

## 6.3. My Assignments

The *My Assignments* tab of the *My Profile* module displays the user's Organizational Unit, Minimum and Maximum Hours Per Week, and Tour Assignments as shown in Figure 6.4. The information displayed is read-only and can only be edited by an Administrator.

Organizational Unit	Agent Organizational Unit Assignment	Start Date	End Date
Medic_Ct_Easton		Default	Default
Time Group	Agent Tour Group Assignments	Start Date	End Date
401	944	Default	Default
Minimum Hours Per Week	Maximum Hours Per Week	Agent Availability	Action
40	40	11:00	Default
Minimum Hours Per Week	Maximum Hours Per Week	Agent Availability	Action
40	40	11:00	Default

Figure 6.4 – My Assignments



## 6.3. My Skill Assignments

The *My Skill Assignments* tab of the *My Profile* module displays the user's Skill Assignments, Skill Levels, and Start and End Dates for these Skills as shown in Figure 6.5. The information displayed is read-only and can only be edited by an Administrator.



Contact Name	Agent Skill Assignments	Skill Level	Start Date	End Date
DBHQ_ABC		1	Default	Default

Figure 6.5 – My Skill Assignments

## 7. Analytics

The *Analytics* module allows the user to view Dashboards, Scorecards, and Reports. The user will be able to view this module if Administrator permits access.

### 7.1. Dashboards

The *Dashboards* module is used to view in chart format the details of metrics such as calls offered, handling time, service levels, etc. at a glance. This module is accessed by clicking on the *Dashboards* link on the *Analytics* drop-down menu as shown in Figure 7.1.

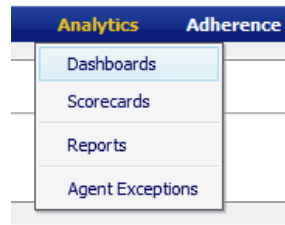


Figure 7.1

#### 7.1.1. Configuration

The *Configuration* section of the Dashboard allows the user to change what is to be charted by selecting the Start and End Dates, Environment and Dashboard Type as shown in Figure 7.2. The *Configuration* section can be collapsed by clicking on the *Arrow* icon above this area.

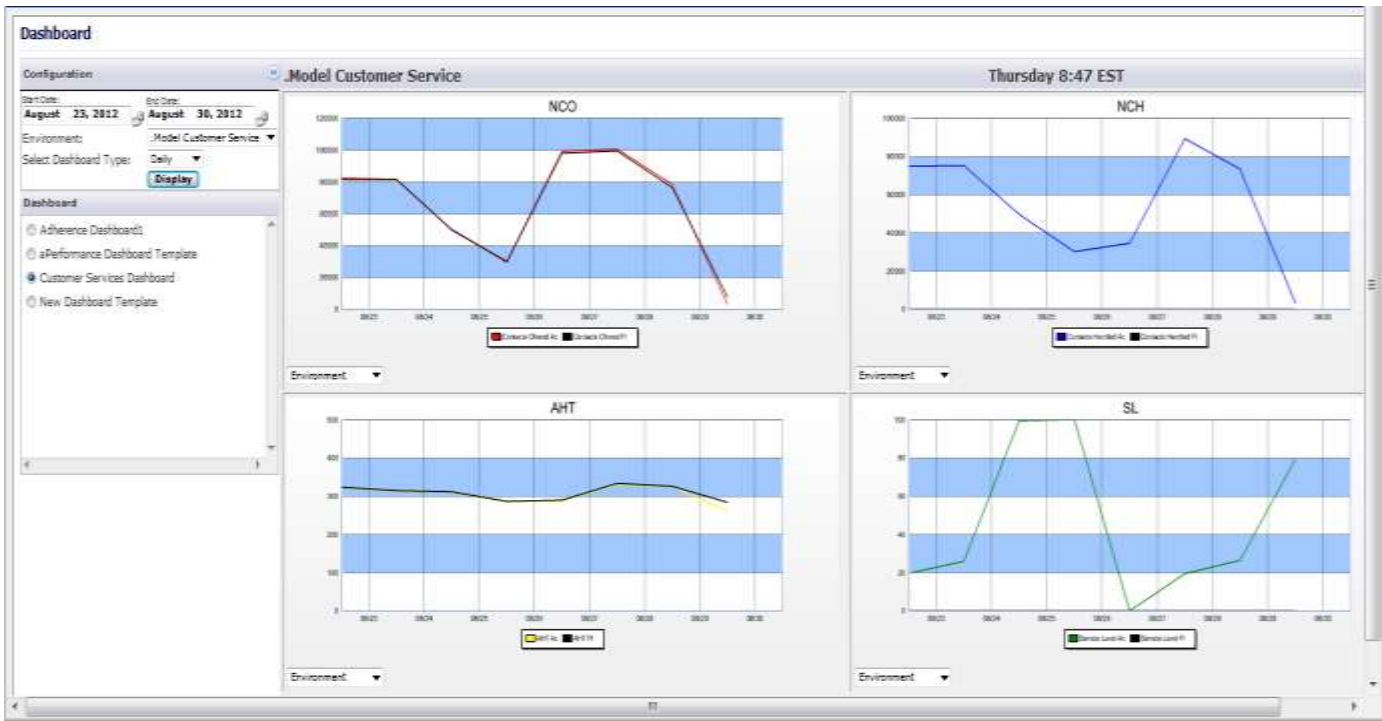


Figure 7.2 – Dashboard

### 7.1.2. Dashboard

The *Dashboard* section displays a list of the dashboards available for selection as shown in Figure 7.3.

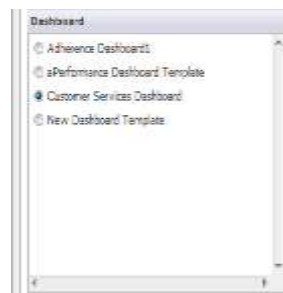


Figure 7.3

### 7.2. Scorecards

The *Scorecards* module is used to see the Performance and Adherence at different levels. Performance includes Service Level, Abandoned Percentage, Calls Offered, Calls Handled, Handling Time and ASA. Adherence includes Adherence Percentage, Shrinkage Percentage, Occupancy Percentage, Planned Handling Time and Actual Handling Time. This module is accessed by clicking on the *Scorecard* link on the *Analytics* drop-down menu as shown in Figure 7.4

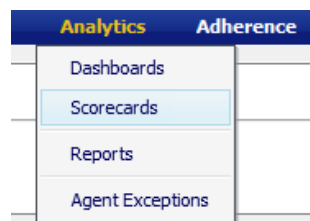


Figure 7.4

### 7.2.1. Performance

On the *Performance* tab the user has the option to change the Scope by clicking on the *Environment* link in the Scope column and drilling down to the Contact Group level. To return to the Environment level simply click on the word "Environments" on the navigation bar below the tabs as shown in Figure 7.5.



Figure 7.5 – Scorecard Performance

### 7.2.2. Adherence

On the *Adherence* tab the user has the option to change the Scope by clicking on the *Environment* link in the Scope column and drilling down to the Team level. To return a level simply click on the word on the navigation bar below the tabs as shown in Figure 7.6.

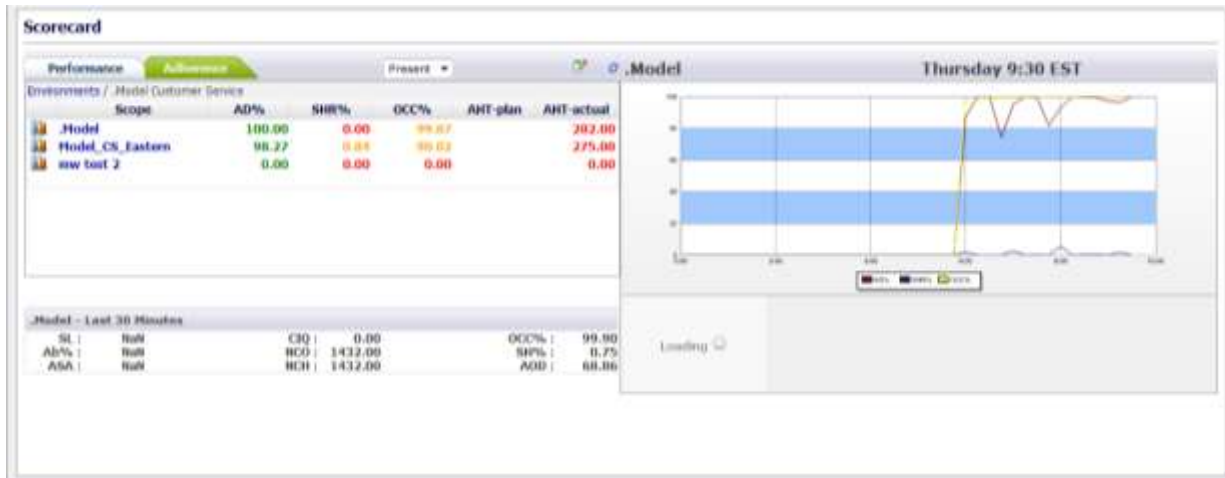


Figure 7.6 – Scorecard Adherence

### 7.3. Reports

The *Reports* module is used to view configured reports. This module is accessed by clicking on the *Reports* link on the *Analytics* drop-down menu as shown in Figure 7.7. The user has the option to select

different reports, environments, contact groups and date ranges using the drop-downs as shown in Figure 7.8.

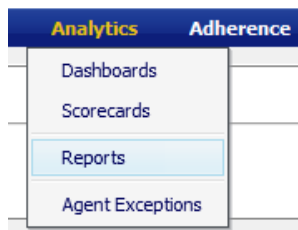


Figure 7.7

Call Stats (daily)

Select Report: Call State (daily) | Select Environment: Hotel Custom | Select Contact Group: CS | Start Date: August 16, 2012 | End Date: August 25, 2012 | Retrieve | Download

Last Updated: 10/13/2010 01:18 PM

Daily	2012													
	16-Aug Thu	17-Aug Fri	18-Aug Sat	19-Aug Sun	20-Aug Mon	21-Aug Tue	22-Aug Wed	23-Aug Thu	24-Aug Fri	25-Aug Sat	26-Aug Sun	27-Aug Mon	28-Aug Tue	29-Aug Wed
CS														
Contacts Offered Ac	82325	81466	49678	30115	99220	100594	78401	82325	81466	49678	30115	99220	100594	78401
Contacts Handled Ac	74820	75155	49659	30115	34532	89240	73291	74820	75155	49659	30115	34532	89240	73291
AHT Ac	322.77	314.30	311.33	280.37	287.99	331.20	325.87	322.77	314.30	311.33	286.57	287.99	331.20	325.87
Service Level Ac	19.59	25.93	89.39	100.00	0.80	19.42	26.43	19.59	25.93	99.39	100.00	6.09	19.42	26.43
Abandonment Percentage Ac	9.12	7.75	0.04	0.00	65.20	11.29	6.52	9.12	7.75	0.04	0.00	85.20	11.29	6.52
ASA Ac	86.86	74.58	0.33	0.00	626.42	104.22	63.91	86.86	74.58	0.33	0.00	626.42	104.22	63.91
Total (Contacts Offered Ac)	82325	81466	49678	30115	99220	100594	78401	82325	81466	49678	30115	99220	100594	78401
Total (Contacts Handled Ac)	74820	75155	49659	30115	34532	89240	73291	74820	75155	49659	30115	34532	89240	73291

Figure 7.8 – Reports

## 8. Adherence

The *Adherence* module allows the user to view My Scorecard, and Adherence Scorecard.

### 8.1. My Scorecard

The *My Scorecard* module shows the user's Adherence and Performance. This module is accessed by clicking on the *My Scorecard* link on the *Adherence* drop-down menu as shown in Figure 8.1. From this page the user can view his/her Adherence, AHT, Break Adherence and Contacts Handled.



Figure 8.1

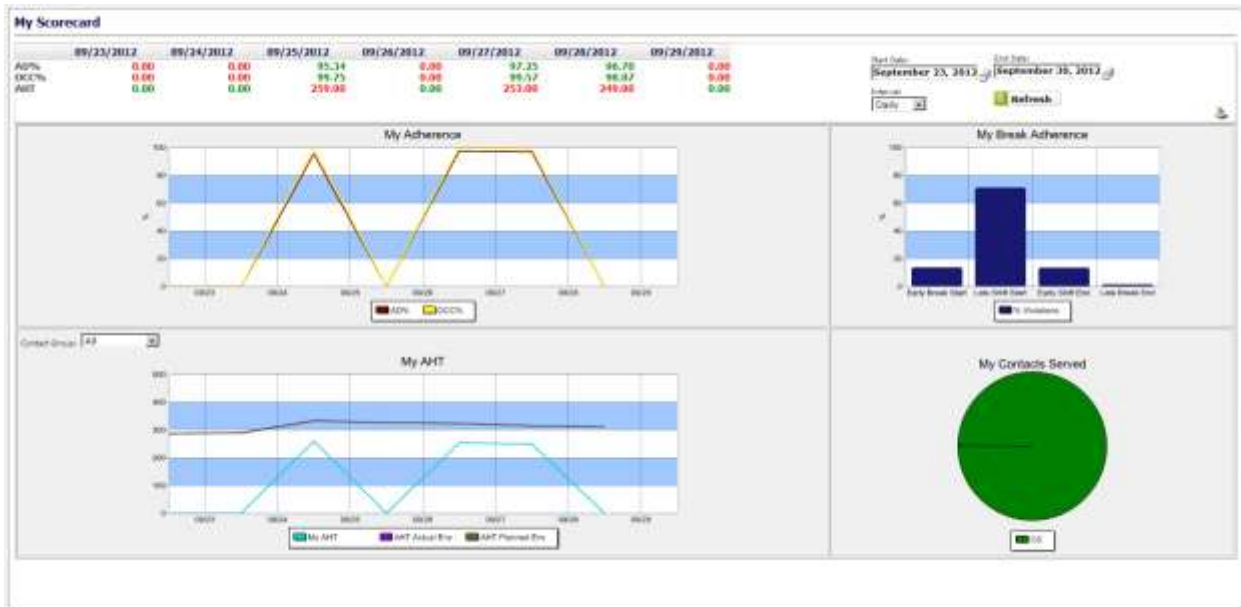


Figure 8.1 – My Scorecard

### 8.3. Adherence Scorecard

See section 7.3.2. for information on the *Agent Adherence* module.

## 9. Calendar

The *Calendar* provides a central location for viewing and managing the work schedules and activities.

### 9.1. My Calendar

The *My Calendar* page is accessed by clicking the *My Calendar* link on the *Calendar* drop-down menu as shown in Figure 9.1. The *My Calendar* page is accessible to all users.

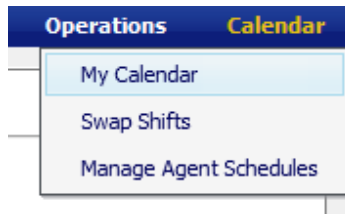


Figure 9.1

The page is designed similar to popular calendar applications as shown in Figure 9.2. This page shows an agent's planned schedule, actual work times, adherence daily, and weekly schedule summary. The planned schedule and break times are shown in white and green while the actual times worked are shown in light and dark gray colors.

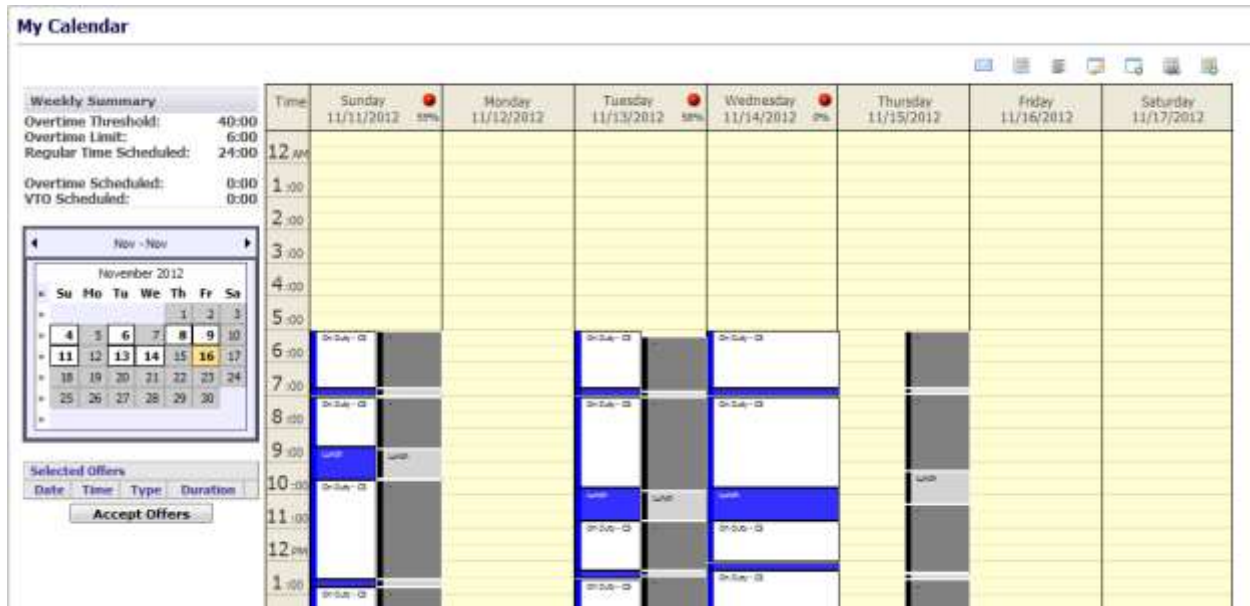


Figure 9.2 – My Calendar

The icons shown in Figure 9.3 in the *My Calendar* page are used to access various features provided by the this page. Features provided by these icons are described below.








						
<b>Email</b>	<b>View Calendar</b>	<b>View Schedule</b>	<b>View Exceptions</b>	<b>Enter Exceptions</b>	<b>Swap/Decline Shifts</b>	<b>Offered Shifts</b>

Figure 9.3 – Calendar Icons

### 9.1.1. Weekly Summary

The *Weekly Summary* area provides a method for viewing a specific week as shown in Figure 9.4. This area shows work and off day status on any given day. To advance the calendar to the next monthly, the user should click on the directional arrows at the top. To view a specific week in the calendar, the user should click on the double arrows to the left of the week.

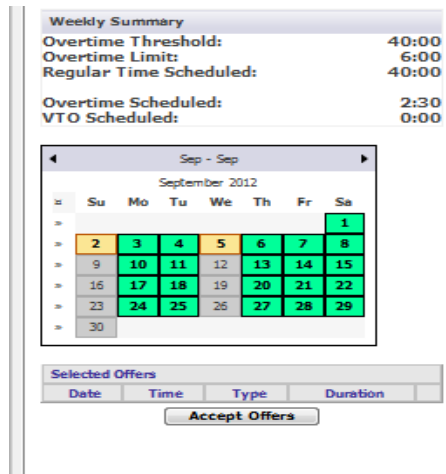


Figure 9.4 – Weekly Summary

### 9.1.2. Calendar View

Selecting a week by clicking on the double arrow >> icon in the Weekly Summary section will display the selected week in the Calendar view as shown in Figure 9.5. Each day of that week is represented in a column, headed by the day of week and date. Rows, divided visually into 30 minute intervals, fill the height of the user’s web browser. The *My Calendar* page displays events during the day with colored time blocks. Hovering the mouse over the individual events will change the event color (to indicate selection), and display a small text box with the start and end times for that event.

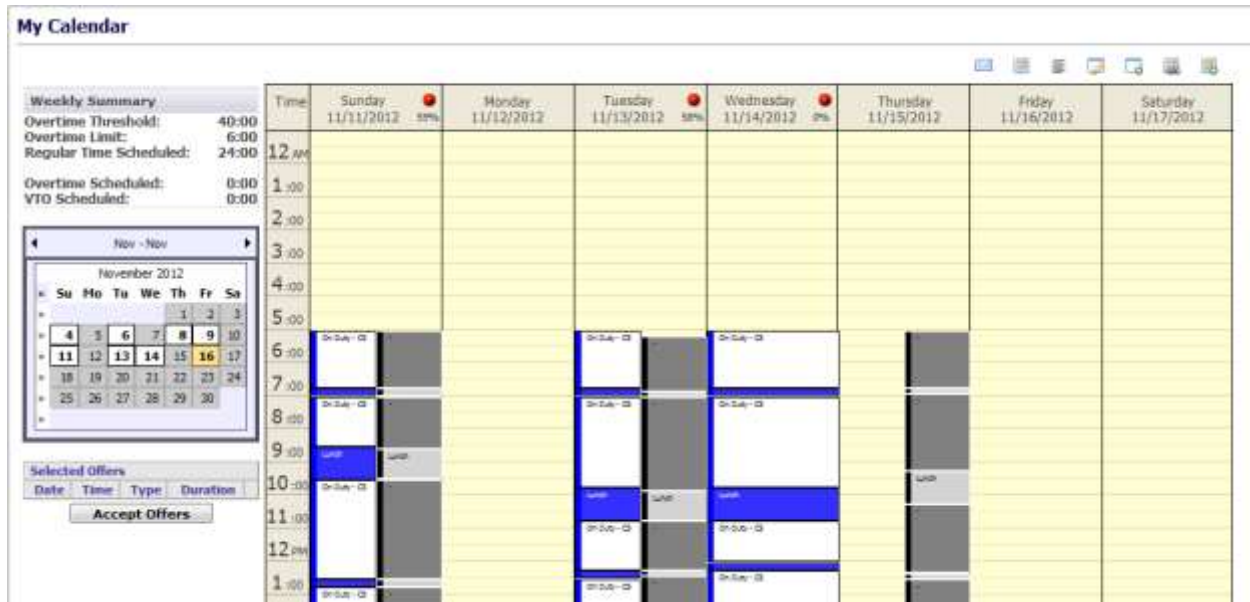


Figure 9.5 – Calendar View

### 9.1.3. View Schedule

Clicking on the *View Schedule* icon will display the text view of schedules as shown in Figure 9.6. Each day of the week is represented in a block, headed by the day of week and date. The specific times are located in the left column, while the status for that period of time is in the right column of the corresponding row. The user can click on the *View Calendar* icon to return to the Calendar view.



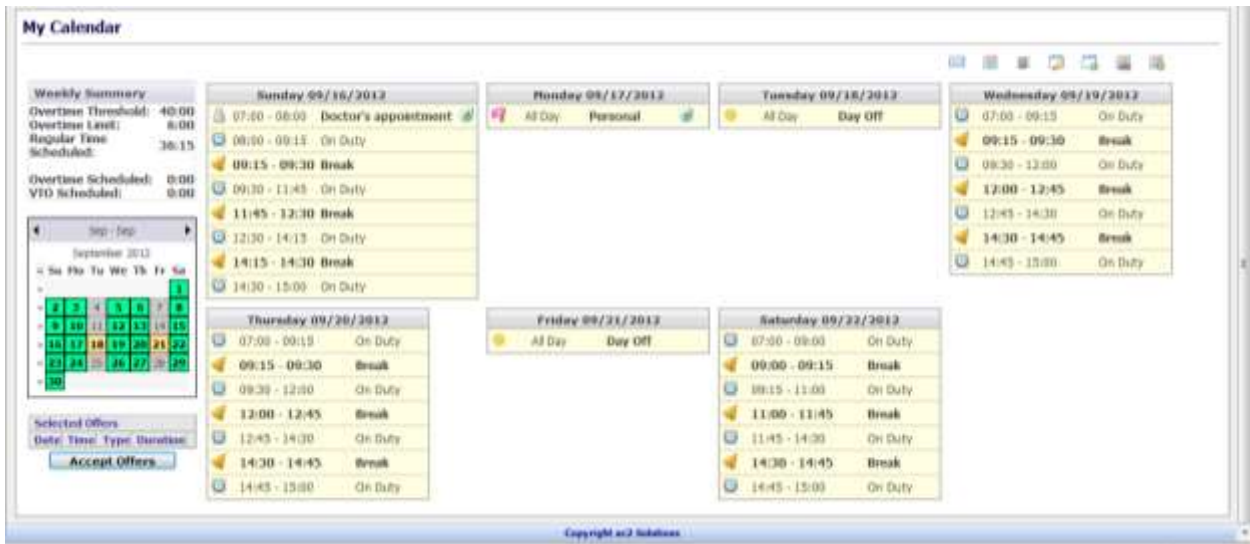


Figure 9.6 – Schedule View

### 9.1.4. Email

This function allows the users to send their schedules via email to others. After selecting the week to be sent, click on the *Email* icon to open the Email Schedule box as shown in Figure 9.7. Enter the email address and click on the *Send* button.

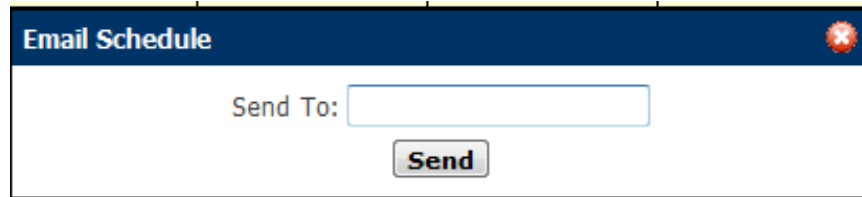


Figure 9.7

### 9.1.5. Enter Exceptions

This function allows the user to enter their requests (exception) for time for specific activities or time off. An agent should click on the Enter *Exceptions* icon to open the Enter Exceptions box as shown in Figure 9.8. The agent is first required to select an exception type from the *Exception* drop-down menu to enter their requests. Depending on the configuration in the AWO Portal, requests for an exception type may be auto-approved or wait listed (pending exceptions) for approval by an Administrator. The agent is also required to enter a start time and duration for the request. Exceptions may only be entered during scheduled shifts. The user should click on the *Submit* button once the selections are completed. To close without exception entry, the user should click on the *Cancel* button.



**Figure 9.8 – Enter Exception**

### 9.1.6. View Exceptions

This function allows the user to view their exceptions for the selected week as shown in Figure 9.9. The user can delete already approved and pending exceptions from this page. Click on the *View Calendar* icon to return to the calendar.

**Figure 9.9 - View Exceptions**

### 9.1.7. Swap Shifts

This function is used to enter swap requests. The user should click on the *Swap Shifts* icon to open the Swap Shifts box as shown in Figure 9.10. Click on the *Request Shift Swap* button to submit the swap. Swaps can be viewed by selecting Calendar-Swap Shifts-My Swap Requests tab described in section 9.2.3 below. To cancel the swap request without saving, click on the red x.

**Swap Shift**

Shift To Swap: Sunday 09/23/2012  Partial

Shift To Get: 9/23/2012

Earliest Start Time: 06 : 00

Latest Start Time: 23 : 45

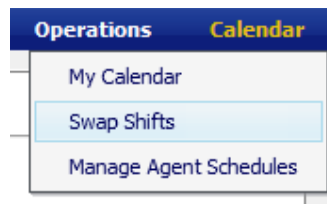
Recurring:  Yes  No

**Request Shift Swap**

**Figure 9.10 – Swap Shift**

## 9.2. Swap Shifts

The *Swap Shifts* module allows the user to manage their shift swaps. This module is accessed by clicking on the *Swap Shifts* on the *Calendar* drop-down menu as shown in Figure 9.11.



**Figure 9.11**

### 9.2.1. Swap Requests

The *Swap Requests* tab allows the user to view possible swaps entered via the *Swap Shifts* icon on the *My Calendar* page as shown in Figure 9.12. By clicking on the *Swap* icon in the Action column of the desired swap, the user can propose one his/her shifts to the other agent for acceptance.

**Schedule Swapping**

Filter for: Name Shifts (in) Looking for: Filter Clear

**Swap Requests** Swaps Proposed to Me My Swap Requests My Swap Proposals Available Shifts

Agent	Shift Offered	Shift Requested (Earliest Start - Latest Start)	Action
ATL Support 4x11 5	Monday 09/17/2012 (18:00 - 21:00)	Friday - 09/21/2012 (10:00 - 13:00)	

**Figure 9.12 – Swap Requests**

### 9.2.2. Swap Proposed to Me

The *Swap Proposed to Me* tab allows the user to accept or reject the proposed swaps as shown in Figure 9.13. To accept a swap, the agent should click on the *Accept Proposal* icon, to reject a swap, click on the *Reject Proposal* icon in the Action column.

Schedule Swapping

File By: Name    Shift On:    Locking Pin:    Filter    Clear

Swap Requests    **Swaps Proposed to Me**    My Swap Requests    My Swap Proposals    Available Shifts

Agent	Shift Offered	Shift Requested (Earliest Start - Latest Start)	Action
ATL Support 4x11 4	Monday 09/17/2012 (00:00 - 00:00)	Friday - 09/21/2012 (00:00 - 00:00)	

Figure 9.13 – Swaps Proposed to Me

### 9.2.3. My Swap Requests

The *My Swap Requests* tab allows the user to view all of his/her pending swap requests as shown in Figure 9.14. The agent may cancel a pending request from this page.

Schedule Swapping

File By: Name    Shift On:    Locking Pin:    Filter    Clear

Swap Requests    Swaps Proposed to Me    **My Swap Requests**    My Swap Proposals    Available Shifts

Agent	Shift Offered	Shift Requested (Earliest Start - Latest Start)	Action
ATL Support 4x11 5	Monday 09/17/2012 (10:00 - 21:00)	Friday - 09/21/2012 (10:00 - 13:00)	

Figure 9.14 – My Swap Requests

### 9.2.4. My Swap Proposals

The *My Swap Proposals* tab allows the user to view their swap proposals and has the opportunity to cancel it if the other agent has not yet accepted it as shown in Figure 9.15. To cancel it, click on the *Cancel Proposal* icon in the Action column.

Schedule Swapping

File By: Name    Shift On:    Locking Pin:    Filter    Clear

Swap Requests    Swaps Proposed to Me    My Swap Requests    **My Swap Proposals**    Available Shifts

Agent	Shift Offered	Shift Requested (Earliest Start - Latest Start)	Action
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Figure 9.15 – My Swap Proposals

### 9.2.5. Available Shifts

This function is used to show Offered Shifts. These are shifts dropped by agents due to day off (sick, personal, etc.) as shown in Figure 9.16.



Figure 9.16 – My Swap Proposals