



CLARITY BY UPTIVITY USER MANUAL, V5.4, R1

November 2014

Reference Guide

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Revision History		
Revision	Change Description	Effective Date
0	Rebranded all content. Added Clarity Terminology section. Reorganized all Agent-level information to be covered within pages 7-14. Revised Forgot Password section to reflect that permission is now required to use this feature. Revised Leave Request information to reflect Call Off permission and ability to request leave for future (unscheduled) dates. Added information on ability to filter for active/inactive employees in Schedule searches. Revised Schedule information based on new Scheduler process changes. Added information on new prediction models to the Forecasting section. Added Schedule Bidding section. Added in Labor Unit and Scheduling sections: The Labor Unit must have employees assigned to it for the scheduling process to work.	2014-04-30
1	Added note to Over/Under Staffing section based on new INI setting that governs how the report considers Skills.	2014-10-09

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Table of Contents

Introduction.....	7
Clarity Terminology.....	7
Manage Your Clarity	8
Login	8
Forgot Password Feature.....	9
Locate Version Number.....	9
Change Your Password.....	9
Log Out	10
User Settings: Update Viewing Time Zone	10
Update Your Employee Information	10
Add or Remove a Widget	10
Dashboard Widget	11
Facebook Widget.....	11
News Widget.....	11
Scheduler Widget.....	11
Twitter Widget.....	12
View Schedules.....	12
Request Leave.....	13
Request Shift Swap.....	13
Bid for Schedules.....	14
Manage Employees.....	15
Searches and Filters	15
Create a Search Filter	16
Edit Employee Information.....	16
View an Employee’s Schedule.....	16
Edit an Employee’s Schedule.....	16
Manage Leave Requests, Shift Swaps, and Call Offs.....	17
Approve/Decline Individual Employee Requests	17
Approve/Decline Multiple Employee Requests.....	18

Record an Employee Call Off.....	18
Report on Employee and Call Activity	19
Real-Time Roster	19
Filter Roster Information.....	20
Perform Real-Time Roster Actions	20
Live Monitoring.....	21
Schedule Overview	23
Edit Shift	23
Mass Event Add	24
Mass Shift Add.....	24
Daily Reports.....	25
Weekly Reports.....	25
Schedule Adherence	27
Daily Adherence	27
Weekly Adherence	28
Report Widgets.....	28
Add or Remove a Report Widget	28
Real-Time Widgets	29
Historical Widgets.....	32
Ad Hoc Reports	33
Ad Hoc Report Builder	34
Report Layouts	37
Report Formats	38
Report Criteria and Fields.....	39
ACD Call and Agent Data	39
Agent Leave/PTO	41
Shift	42
Create an Ad Hoc Report.....	43
Edit Existing Ad Hoc Reports	43
Generate an Ad Hoc Report	45
Forecast Call Volumes	46

Import Data from a File	47
Create a Historical Call Volume Set	48
Select Data from Devices	48
Select Data from an Existing Data Set	48
Modify a Historical Call Volume Set	49
Manually Modify Data	50
Auto-Correct Selected Data	51
Add Events to Data	51
Auto-Correct Outliers	52
Undo/Revert Changes	52
Save the Modified Data Set	52
Create a Call Volume Forecast	53
Review the Call Volume Trend	53
Predict Call Volume	54
Modify the Predicted Call Volume Data	54
Schedule Employees	56
Manually Create a Schedule without a Forecast	57
Create a New Schedule Entry	57
Create a Schedule	58
Edit a Schedule	58
Automatically Generate a Schedule Using a Forecast	59
Scheduler Process	59
Create a New Schedule Entry	60
Generate a Schedule	61
View Schedule	61
Overtime for Period	61
Over/Under Staffing	62
Service Level	64
Publish a Schedule	66
Undo Publish Schedule	66
Export a Schedule	67

Schedule Bidding.....	68
Agent Ranking Criteria.....	68
Create Agent Ranking Criteria	69
Edit Agent Ranking Criteria	69
Delete Agent Ranking Criteria	70
Bidding Schedules.....	70
Manually-Created Bidding Schedules	71
Manually Create a Bidding Schedule	72
Automatically-Generated Bidding Schedules.....	72
Generate a Bidding Schedule Automatically.....	73
Edit a Bidding Schedule	74
Delete a Bidding Schedule.....	75
Award a Bidding Schedule.....	75
Undo a Bidding Schedule Award	76
Publish Bidding Schedule Awards	76
Undo Publishing a Bidding Schedule Award	77
Bidding Periods.....	77
Initiate a Bidding Period.....	77
Manually Close a Bidding Period.....	77
About Uptivity	78

Introduction

This manual is for Clarity by Uptivity managers and agents. The manual assumes you are familiar with basic Windows networking and PC usage, and with working in a web browser. To use Clarity, you will need a user account and password.

Clarity Terminology

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

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

Manage Your Clarity

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

Login

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

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

To log in:

1. In your web browser, type the URL (hostname or IP address) of the site into the address bar (for example, `http://clarityserver.yourcompany`).
2. Enter your Clarity user name.

Note: Clarity does not support browser-based saving of your username for security reasons. You will need to enter your username at each login.

3. Enter your Clarity password.

Note Passwords are case sensitive.

4. Click **Login**. Clarity opens to the last page you accessed. For a first time login, it opens to the Home tab.

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

To attempt another login, you should

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

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

Forgot Password Feature

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

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

To use the feature:

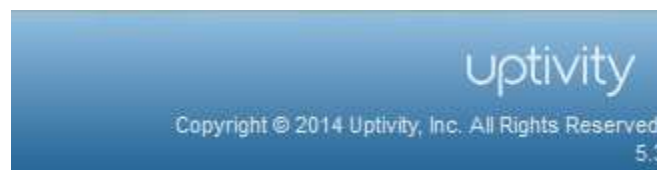
1. Click the **Forgot Password** link on the login screen.
2. On the page, enter the username and click **Submit**.

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

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

Locate Version Number

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



Change Your Password

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

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

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

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.

User Settings: Update Viewing Time Zone

By default, Clarity displays time based on your location. When a supervisor creates a schedule and employees are in a different time zone, the supervisor has to change the time zone to that of the employees to see the schedule the way the employees will see it.

To change the viewing time zone:

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

Update Your Employee Information

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

To update your employee information:

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

Add or Remove a Widget

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

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

To add a widget:

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

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

Dashboard Widget

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

Supervisors can see the number of unapproved leave and swap requests they have to review. Click the corresponding links to open a page listing the requests. For details on the approval process, see [Manage Leave Requests, Shift Swaps, and Call Offs](#).

Facebook Widget

If the **Facebook** widget is configured by the Clarity administrator, users can see text postings to a Facebook account but no images. This feature allows supervisors to communicate to employees both internally and externally using the same tool.

News Widget

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

To add an announcement:

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

To edit or remove a posting:

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

Note Editing a message 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. 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.

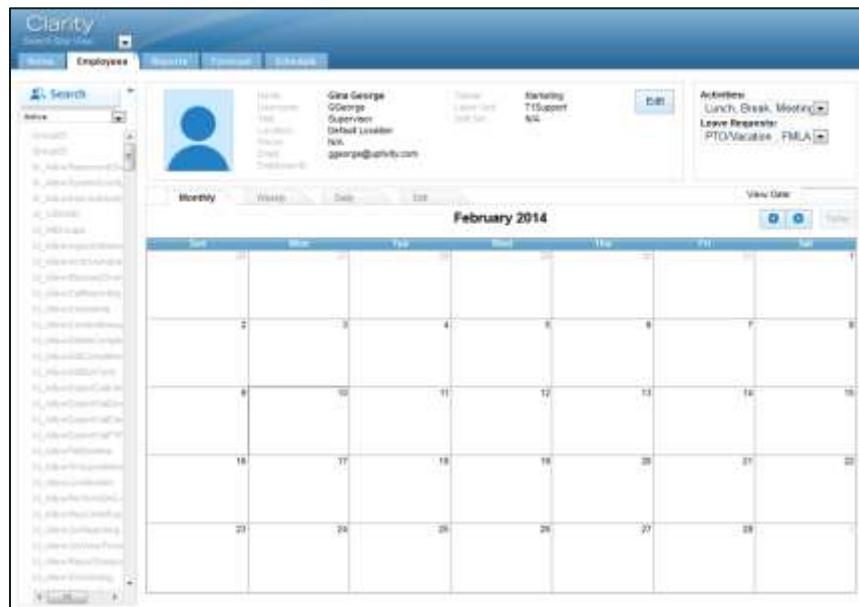
The links in the **Completed Schedules** section of the widget display as either Scheduler Report or Bidding Schedule, along with the date and time of the schedule's creation; names of saved schedules do **not** display. Click the corresponding links to load and view the schedules.

Twitter Widget

Once the **Twitter** widget is configured by the Clarity administrator, users can receive tweets from one Twitter account. This feature allows supervisors to communicate to employees both internally and externally using the same tool.

View Schedules

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



Supervisors with permissions to see schedules for other employees can do so by either selecting an employee from the left navigation list or by clicking **Search**. The drop-down at the top of the left navigation list allows you to filter for Active (default), Inactive, or All employees. For more information, see [Manage Employees](#).

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

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

Request Leave

Leave requests can be submitted by employees or their supervisors. System administrators define the request types and whether a request must be approved by a supervisor. You will receive an email when your request is approved or rejected. You cannot cancel requests after they have been submitted. If you request time off on a date with no scheduled shift, you must request the entire day. If you request time off during a scheduled shift, the minimum increment is 15 minutes.

To request time off:

1. On the **Monthly** tab of the schedule, right-click the desired date for your leave.
2. In the **From:** and **To:** fields of the **Request Leave** dialog box, select the starting and ending date and time of the leave if you have a scheduled shift, or just the starting and ending dates if you have no shift scheduled (enter the same date in both fields to request a single day).
3. Select a **Leave Type**.
4. In the **Comments** field, enter any additional information the supervisor needs to approve the leave or adjust the schedule.
5. Click **Submit Request**.

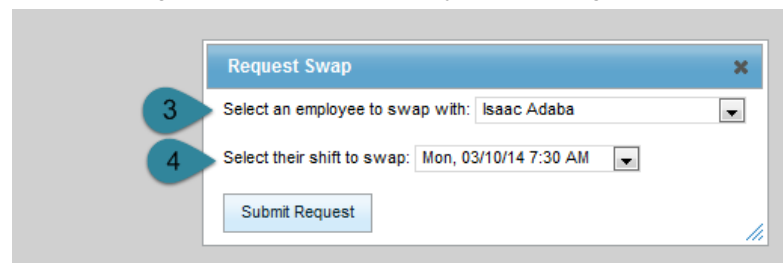
Note Clarity treats Call Offs as a special type of leave request. Because many organizations limit who can record call offs, the ability to Call Off is controlled by Clarity permissions. If your organization permits you to log Call Offs for yourself, follow steps 1-3 of [Record an Employee Call Off](#).

Request Shift Swap

Employees with the same Skill or Skills can request to take other employees' shifts or to swap shifts. For example, Employee 1 has Skills A and B. Employee 2 has Skills C and D. Employee 3 has Skills A, B, C, and D. Employee 3 can swap shifts with either Employee 1 or 2. But Employees 1 and 2 cannot swap shifts with each other. Only one employee has to submit the swap request.

To submit a shift swap:

1. On the **Weekly** or **Daily** tab of an employee's schedule, right-click the schedule entry that will be given to another employee. Only future shifts or shifts currently in progress are eligible for swapping.
2. Click **Request Swap**.
3. Select an employee willing to swap shifts.
4. Select the shift to be swapped.
5. Click **Submit Request**.



Users cannot cancel requests after they have been submitted. Emails are first sent to requestees and the swap request will appear on their schedule. They can choose to approve or deny it. If the request is denied, a notification email is sent to the requester and the request is declined. If the request is approved, it is set to Awaiting Manager Approval status and an email is sent to the manager.

Bid for Schedules

Clarity's Schedule Bidding functionality 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 will 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 will also see a **Bid for Schedules** button at the top of your **Home** tab. This button will appear as long as your Labor Unit has Bidding Schedules for which you have not entered bids. You must have appropriate permissions to bid for schedules; ask your Clarity administrator if you have questions.

Bid for Schedules							Cancel	Save	Commit
Bid Schedule Name: Bid for 4/13 to 4/19									
Mon Apr 14 2014 – Sun Apr 20 2014									
Mon Apr 14	Tue Apr 15	Wed Apr 16	Thu Apr 17	Fri Apr 18	Sat Apr 19	Sun Apr 20	Bid		
8:30 AM - 5:00 PM	8:30 AM - 5:00 PM	8:30 AM - 5:00 PM	8:30 AM - 5:00 PM	8:30 AM - 5:00 PM			No Bid		
12:00 PM - 8:30 PM	12:00 PM - 8:30 PM	12:00 PM - 8:30 PM	12:00 PM - 8:30 PM	12:00 PM - 8:30 PM			No Bid		
12:00 PM - 8:30 PM	12:00 PM - 8:50 PM	12:00 PM - 8:50 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 the shifts according to your preferences (i.e. "1" for your first choice, "2" for your second choice, etc.), and you can give multiple shifts the same rank. You do not have to bid on every shift. Once you commit your bids, you cannot change them, nor can you bid for shifts which you did not rank previously.

To bid for schedules:

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

Manage Employees

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

Searches and Filters

The screenshot displays the 'Search' window interface. At the top, there are navigation tabs: 'Real Time', 'Historical', 'Overview', 'Adherence', 'Processes', and 'Ad-Hoc'. Below these is a 'Saved Search Criteria' section containing a table with columns: Name, Default, Type, Creator, DateCreated, and buttons for 'Apply' and 'Delete'.

Name	Default	Type	Creator	DateCreated	Apply	Delete
.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

Below the table is the 'Search Criteria' section, which includes input fields for 'First name', 'Last name', 'Title' (with a dropdown menu), 'Location' (with a dropdown menu), 'Employee ID', 'Labor unit' (with a dropdown menu), 'Team' (with a dropdown menu), and 'Active/Inactive' (with a dropdown menu). There are also buttons for 'Clear', 'Search', and 'Save Search Criteria'.

The **Search** window shown here is available from the **Employees** tab, as well as in [Schedule Overview](#) and [Schedule Adherence](#) reports. 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.

Custom search filters can be built and saved 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 as shown here. Filters saved in one page are available in others that allow saved filters. Similarly, a filter set as the default on the **Overview** report will be the default on the **Adherence** report and the **Employees** tab as well.

Filters may be saved 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. The current default filter is denoted in the list of saved filters by an X in its row under the default column. The default filter will load automatically when this page opens.

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**.

Create a Search Filter

To save a filter of custom search criteria:

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

Edit Employee Information

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

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

View an Employee's Schedule

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

To view an employee's schedule:

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

Edit an Employee's Schedule

To edit an employee's schedule after the schedule has been published:

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

Manage Leave Requests, Shift Swaps, and Call Offs

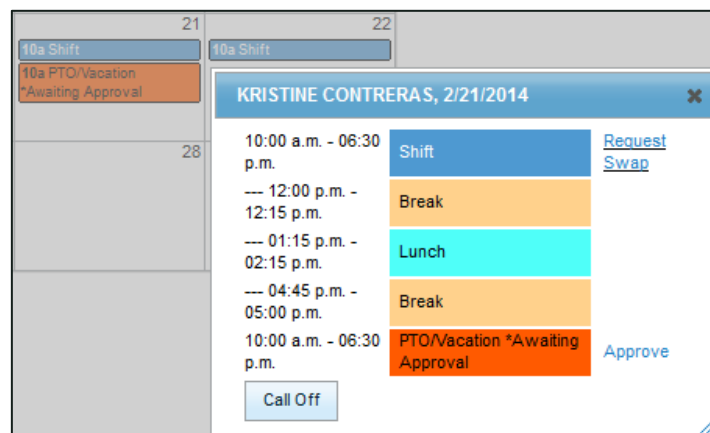
Each organization approaches leave management differently. In some, supervisors submit leave and shift swap requests on behalf of their employees, although most allow employees to submit these requests themselves. Supervisors may also have to approve employee requests for leave or shift swaps, depending on the leave request type configuration settings. For more information, see [Request Leave](#) and [Request Shift Swap](#).

In most organizations supervisors record Call Offs if the employee does not report for work or notifies the supervisor that he will not report. Some organizations allow employees to record their own call offs, but this is not typically a best practice.

If employees have email addresses entered on their accounts, they will receive emails when call offs are recorded, requests are made for them, or requests and swaps are approved. Supervisors receive email notifications when employees make requests, even if the request does not have to be approved.

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

Approve/Decline Individual Employee Requests



To approve or decline an individual employee's leave or shift swap request:

1. Navigate to the employee's schedule as shown in [View an Employee's Schedule](#).
2. Right-click on any request designated "Pending Approval".
3. Click **Approve** in the pop-up box.

Approve/Decline Multiple Employee Requests

The Processes page displays all current and past requests. You can use the search criteria fields to search for a specific request. This search does not support multiple criteria within a category. You can also use the sort triangles at the top of each column to sort the display by the contents of that column.

Requests initially appear in the list as Pending, and can be returned to that status after having been previously approved or declined.

The screenshot shows a 'Request Search' interface. At the top, there are search filters for 'First Name', 'Last Name', 'Title', 'Location', 'Team', 'Status', 'Start Date Range', and 'End Date Range'. Below the filters is a 'Clear' button and a 'Search' button. The main content area is divided into two sections: 'Leave Requests' and 'Swap Shift Requests'.

Leave Requests Table:

Name	Request Type	Location	Title	Teams	Status	Leave Start	Leave End	Actions
Administrator Administrator	PTO/Vacation	Default Location	Employee	N/A	Pending	9/29/2012 7:00:00 AM	9/29/2012 3:00:00 PM	Approve Decline Pend
Daniel Ayala	Call Off	Default Location	Employee	FrenchAllNight	Pending	1/2/2014 7:00:00 PM	1/2/2014 6:59:00 PM	Approve Decline Pend
Daniel Ayala	Call Off	Default Location	Employee	FrenchAllNight	Pending	2/14/2014 12:00:00 AM	2/14/2014 11:59:00 PM	Approve Decline Pend
Gina George	Call Off	Default Location	Supervisor	Marketing	Approved	2/5/2014 7:00:00 PM	2/5/2014 6:59:00 PM	Approve Decline Pend

Swap Shift Requests Table:

Name	Location	Title	Shift Start	Shift End	Swap With	Shift Start	Shift End	Status
------	----------	-------	-------------	-----------	-----------	-------------	-----------	--------

To approve or decline multiple pending leave or shift swap requests:

1. Click the **Reports** tab.
2. Click the **Processes** button.
3. Review each request and click the appropriate status option.
4. In the Comments box, enter any desired comments.

Record an Employee Call Off

To record a call off on behalf of an employee:

1. Navigate to the employee's schedule as shown in [View an Employee's Schedule](#).
2. On the **Monthly** tab of the schedule, right-click on the date of the call off.
3. Click the **Call Off** button.
4. Right-click on the **Call Off** schedule entry.
5. Click **Approve**.

Report on Employee and Call Activity

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

Real-Time Roster

Name	Ext.	Labor Unit	Skill	Scheduled	Actual	Late	Duration	Action
VAZQUEZ, FRANKLIN	3010163	Corax - HSI	500, 505, 510, 515, 520, 525, ...	Off Shift	Off Shift	--	11:51:12	
<i>RIVERA, FELIX</i>	<i>3010029</i>	<i>Corax - HSI</i>	<i>500, 505, 510, 515, 520, 525, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>00:02:52</i>	
HULL, ANGELICA	3020006	Corax - HSI	500, 505, 507, 510, 512, 515, ...	Off Shift	Off Shift	--	13:52:51	
<i>AGENT, CALLCOPy</i>	<i>3010034</i>	<i>Corax - HSI</i>	<i>500, 505, 506, 507, 508, 510, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>00:01:23</i>	
<i>ZAMORA, MABLE</i>	<i>3010001</i>	<i>Corax - HSI</i>	<i>500, 505, 506, 508, 510, 511, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>01:37:01</i>	
<i>RUTLEDGE, COREY</i>	<i>3010091</i>	<i>Corax - HSI</i>	<i>500, 505, 507, 510, 512, 515, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>00:02:44</i>	
<i>WELCH, TERRENCE</i>	<i>3010030</i>	<i>Corax - HSI</i>	<i>500, 505, 506, 507, 508, 510, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>00:01:34</i>	
<i>Rankin, Cheryl</i>	<i>3010093</i>	<i>Corax - HSI</i>	<i>500, 505, 510, 515, 520, 525, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>00:00:20</i>	
<i>CONTRERAS, KRISTINE</i>	<i>3010036</i>	<i>Corax - HSI</i>	<i>500, 505, 510, 515, 520, 525, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>00:00:26</i>	
STRONG, CLINTON	3010140	Corax - HSI	500, 505, 507, 510, 512, 515, ...	Off Shift	Off Shift	--	21:29:35	
<i>PRESTON, MALINDA</i>	<i>3010003</i>	<i>Corax - HSI</i>	<i>500, 505, 507, 510, 512, 515, ...</i>	<i>Off Shift</i>	<i>Lunch</i>	--	<i>00:04:44</i>	
<i>WARNER, JEAN</i>	<i>3010170</i>	<i>Corax - HSI</i>	<i>500, 505, 510, 515, 520, 525, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>00:14:22</i>	
<i>ELLISON, LESLEY</i>	<i>3010190</i>	<i>Corax - HSI</i>	<i>500, 505, 506, 507, 508, 510, ...</i>	<i>Off Shift</i>	<i>Available</i>	--	<i>00:12:27</i>	
FISCHER, LOLA	3010028	Corax - HSI	500, 501, 502	Off Shift	Off Shift	--	11:05:35	
HENRY, JEANNETTE	3020009	Corax - HSI	500, 501, 502, 507	Off Shift	Off Shift	--	14:45:44	

The Real-Time Roster provides current status information for employees in Clarity. This information can be used to locate employees, determine which ones can be sent to break, or assess if employees need to be called in to handle increasing call volumes. The information is updated every 15 seconds. Information on the roster is a point-in-time calculation, and is not retained. Users assigned a role with the RosterAll permission can see all employees. Users with the RosterTeam permission see only their team members.

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

- **Employee name:** Names appear in red if the employees' scheduled state differs from their actual state. For example, an employee who is late going to lunch may show a **Scheduled Status** of Lunch and an **Actual Status** of On Call. Likewise, an employee who has called off on a scheduled work day could show a **Scheduled Status** of On Shift and an **Actual Status** of Off Shift.
- **Extension:** Telephone extension used by the employee.
- **Late:** How long the Scheduled/Actual states have conflicted. Late is relevant to the closest schedule state change and the Late Threshold value set on the Shift Activity Type. For example, if the threshold is 300 seconds (five minutes) and the employee has not logged into the phone at four minutes after an activity was scheduled to start, the roster will not show her as late. Users that are late for an activity appear in red italics.
- **Duration:** Indicates the total time in a current actual state.

Tip Sort items in a 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.

Filter Roster Information

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


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

Perform Real-Time Roster Actions


To view the roster:

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

To view an agent's profile from the roster:

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

To remove an agent from the roster list:

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


To add a removed employee back to the roster:

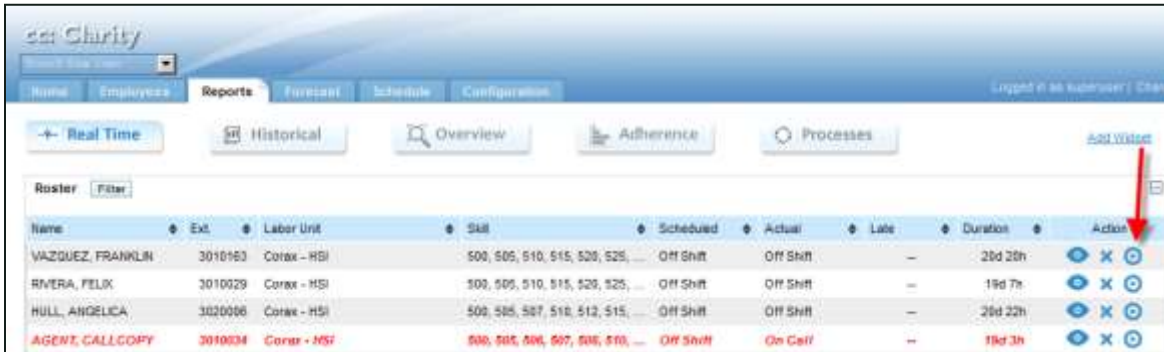
1. Click the **Reports** tab, then click the **Real Time** button.
2. In the Roster area, click **Filter**.
3. Locate the employee in the Removed Agents list.
4. Click **Cancel**.
5. Click **Filter**. The roster refreshes, and the user appears on the list.


Live Monitoring

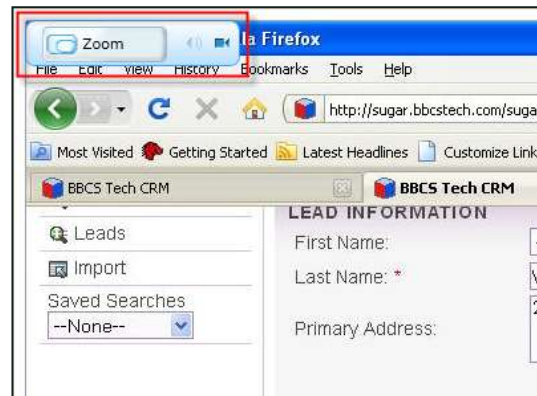
Note The Live Monitoring feature requires that Discover by Uptivity be installed and configured along with Clarity. It also requires licensing for the Uptivity Desktop Recording feature. This functionality is not available in a standalone installation of Clarity.

To view an agent's desktop in near-real-time:

1. From the Real-Time Roster screen, scroll to the agent to be monitored, and click on the Play button  in the Action column to open the live feed in a separate window.



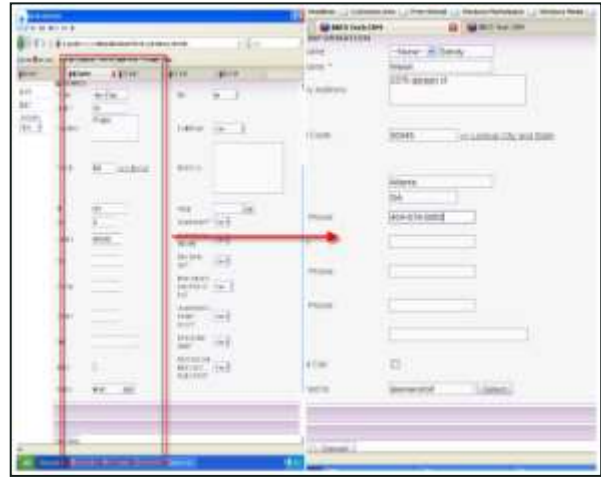
2. Hover the mouse cursor over the tab  in the upper left of the playback area to display the zoom menu. The speaker and camera icons indicate the presence or absence of audio and screen feeds. In the example, video is available, but no audio.



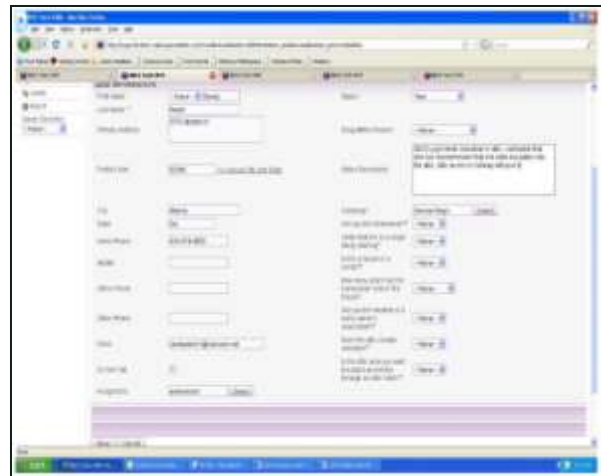
Report on Employee and Call Activity

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

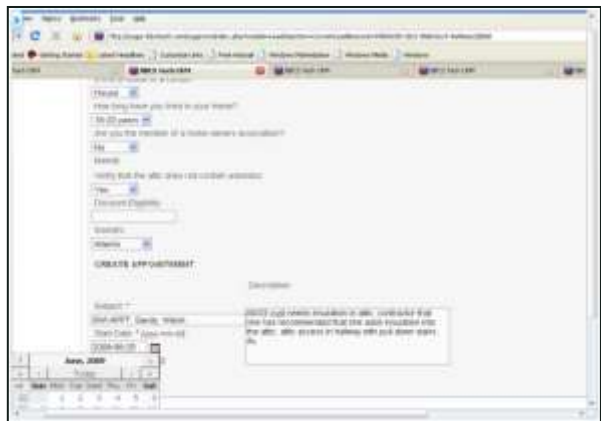
- **Split** shows a compressed view of the entire screen on one side with a movable zoom marker to indicate the portion of the screen to show zoomed 100% on the other side.



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



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



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

Schedule Overview

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

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

To view employee schedules:

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

Edit Shift

On both the **Daily** and **Weekly** report tabs, events can be added or modified on existing shifts. The following revisions are available:

- 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 the **Add Shift** button.
- Add a Leave Request by clicking the **Add Leave Request** button and configuring the date, leave type and request status.

To edit a shift:

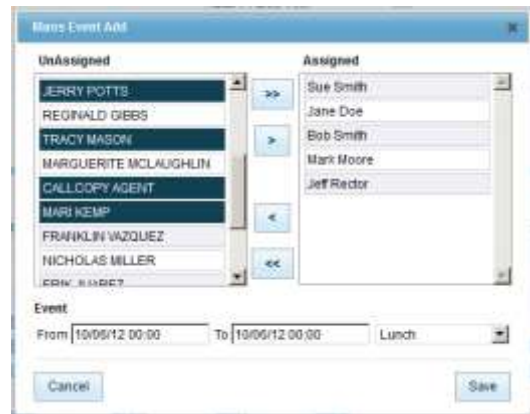
1. Click on an existing shift and select **Edit Shift** from the pop-up dialog.
2. Make the appropriate selections to revise the shift.

3. Click **Save**.

Mass Event Add

To add a specific event to multiple employees at once:

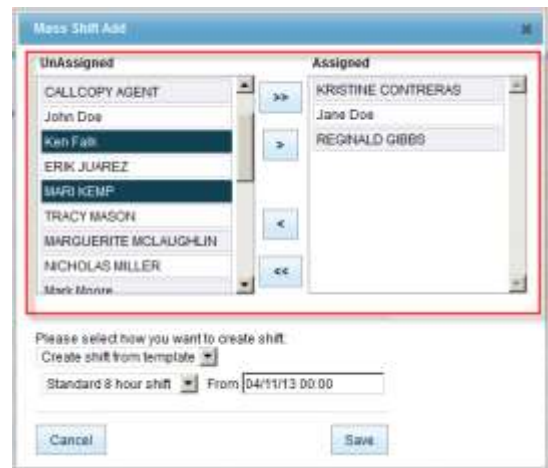
1. Click one or more names in the Unassigned column.
2. Use the arrow keys to move the selected agents to the Assigned column.
3. Use the pop-up calendar and slider bars to enter the starting time for the event in the From box.
4. Use the pop-up calendar and slider bars to enter the ending time for the event in the To box.
5. Select the type of event from the drop-down list of Shift Activity Types.
6. Click **Save**.



Mass Shift Add

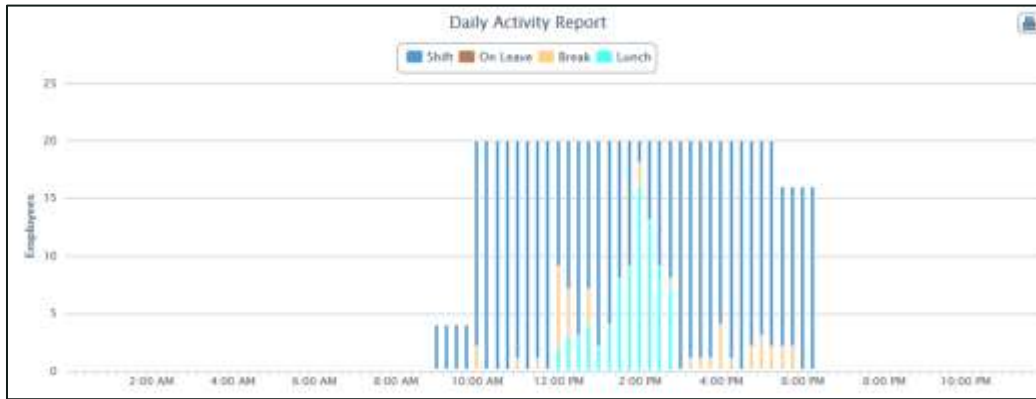
To add a specific shift schedule to multiple employees at once:

1. Click one or more names in the Unassigned column.
2. Use the arrow keys to move the selected agents to the Assigned column.
3. Use the drop-down list to choose whether to **Create shift from template** or **Create shift manually**.
4. 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.
5. 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 on **+ Add Activity**.
6. Click **Save**.



Daily Reports

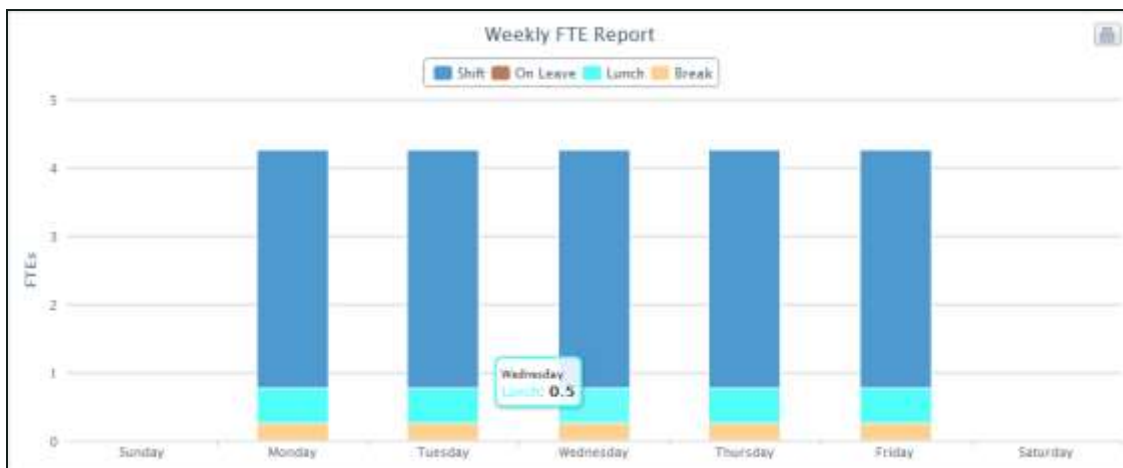
On the **Daily** tab, following the schedule overview, the **Daily Activity Report** provides a visual representation of coverage throughout the specified day. To print this report, click the Print button in the upper right corner.



Weekly Reports

On the **Weekly** tab, following the schedule overview, the **Weekly FTE Report** displays labor distribution for a given day for employees who were available for scheduling. This helps supervisors to balance resource allocation between standard shift activities and other tasks, like meetings, training, or breaks, while avoiding under- or overstaffing situations. This report can be printed by clicking the Print button in the upper right corner.

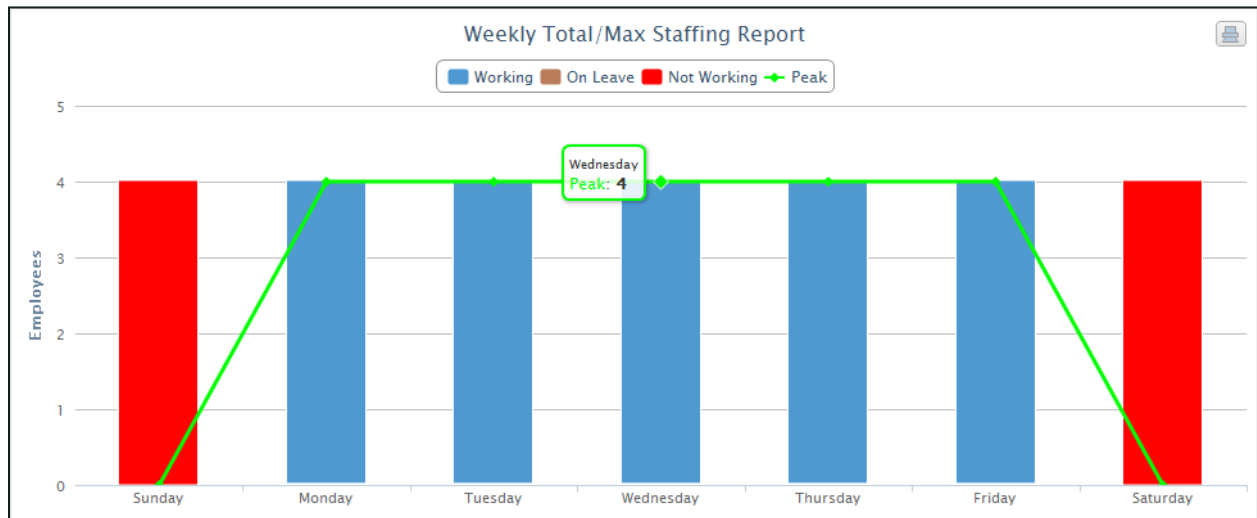
Note If an employee has requested leave during a week, and the request was made when the employee did not have a shift scheduled, that employee will not be reflected as "on leave" in this report since he/she was not available for the week.



Report on Employee and Call Activity

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

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



Schedule Adherence

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

Schedule Adherence is updated whenever the page is loaded or refreshed, with calculations current as of the last full hour. For example, at 10:59 A.M., adherence data would be current as of 10 A.M. At 11:01 A.M., adherence data would be current as of 11 A.M. The report will appear below 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%. This is because the system does not know if the lack of data is due to a system issue or due to an agent being out of adherence and not being there for real time data to record.


Daily Adherence

On the **Daily** tab, the display shows a visual representation of coverage throughout the specified day and how accurately actual hours align compared to those originally scheduled. Groupings can be expanded by clicking the **+** icon to show actual activity charts for scheduled employees and events compared to what was scheduled.

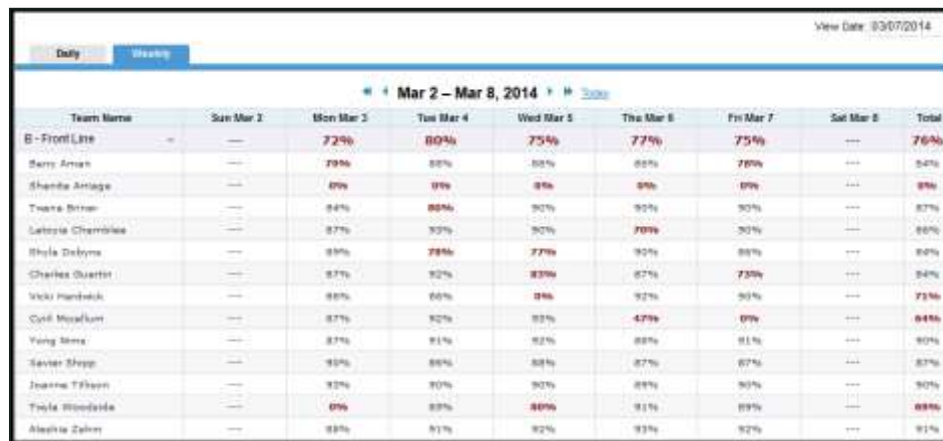
Click the arrows at the top of the schedule to move forward or backward in time, click the **View Date** field to move to a specific day or week, or click **Today** for current information. Hover the mouse cursor over an element in the chart to display more details.



Weekly Adherence



The Weekly tab shows schedule adherence over a seven-day period. Groupings can be expanded by clicking the  icon to show more specific detail broken down by day.

Click the arrows at the top of the schedule to move forward or backward in time, click the **View Date** field to move to a specific day or week, or click **Today** for current information. Hover the mouse cursor over an element in the chart to display more details.



Team Name	Sun Mar 2	Mon Mar 3	Tue Mar 4	Wed Mar 5	Thu Mar 6	Fri Mar 7	Sat Mar 8	Total
B-Front Line	---	72%	80%	75%	77%	75%	---	76%
Samy Aman	---	79%	88%	88%	88%	78%	---	84%
Shanda Arango	---	8%	8%	8%	8%	8%	---	8%
Tawna Britton	---	84%	88%	90%	90%	90%	---	87%
Lebronna Chambers	---	87%	90%	90%	90%	90%	---	88%
Rhyla Debyrne	---	88%	78%	77%	80%	88%	---	84%
Charles Guertin	---	87%	80%	83%	87%	73%	---	84%
Vicki Harwick	---	88%	88%	8%	92%	90%	---	73%
Cyril Moulton	---	87%	82%	83%	47%	8%	---	84%
Yung Sims	---	87%	81%	82%	88%	81%	---	80%
Xavier Shepp	---	88%	88%	88%	87%	87%	---	87%
Joanne Tilson	---	82%	80%	90%	88%	90%	---	80%
Tylea Woodside	---	8%	88%	88%	81%	89%	---	88%
Alecia Zaher	---	88%	81%	92%	93%	92%	---	91%


Report Widgets

Both the **Real Time** and **Historical** buttons on the **Reports** tab offer a selection of report widgets to display specific information. Each widget organizes data by Labor Unit on tabs across the top of the widget. Click a widget's up/down arrows to scroll through the available Labor Unit tabs, or click a widget's blue-dot arrow to see a drop-down list of all the Labor Unit tabs ( ).

Add or Remove a Report Widget

To add a widget:

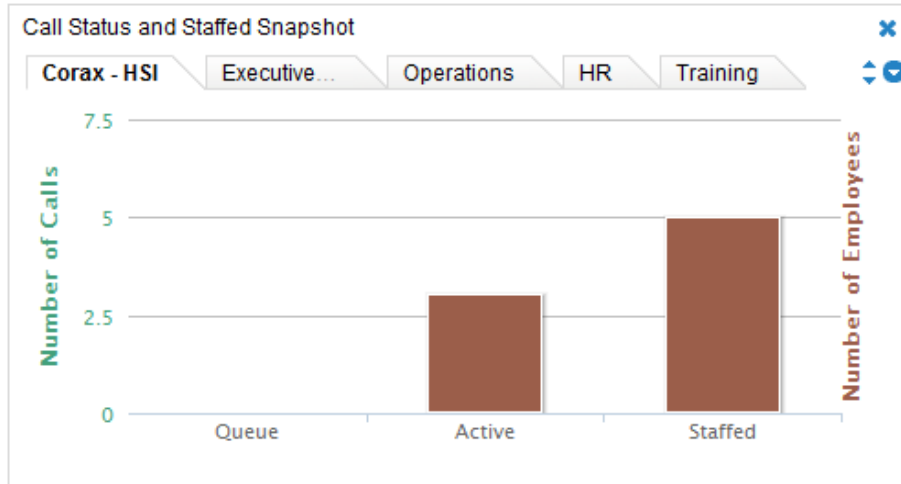
1. Click the **Reports** tab, then either the **Real Time** or **Historical** tab depending on the widget to be added.
2. Click the **Add Widget** link.
3. Select a report widget from the drop-down list. The widgets available will vary depending on whether you clicked the **Real Time** or **Historical** button.
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. A widget can be re-added by repeating steps 1-5.

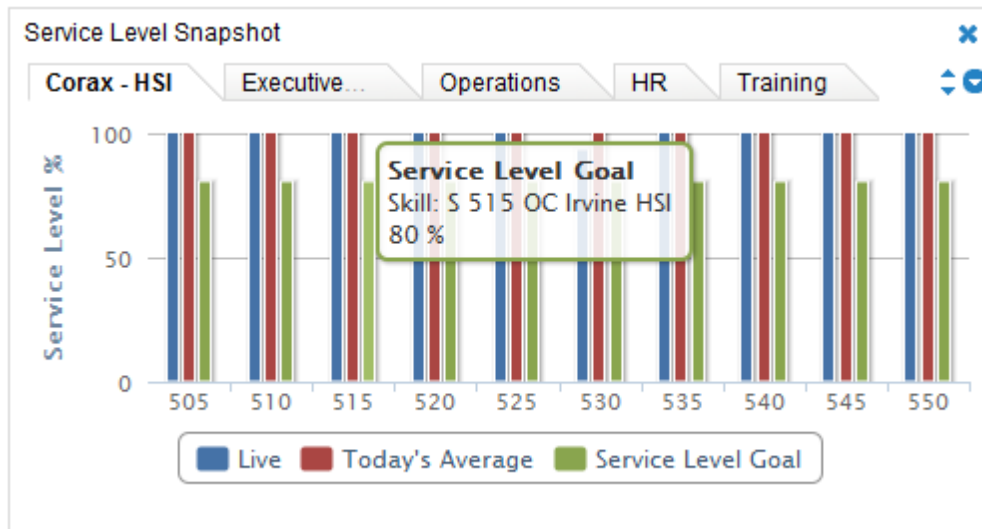
Real-Time Widgets

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

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

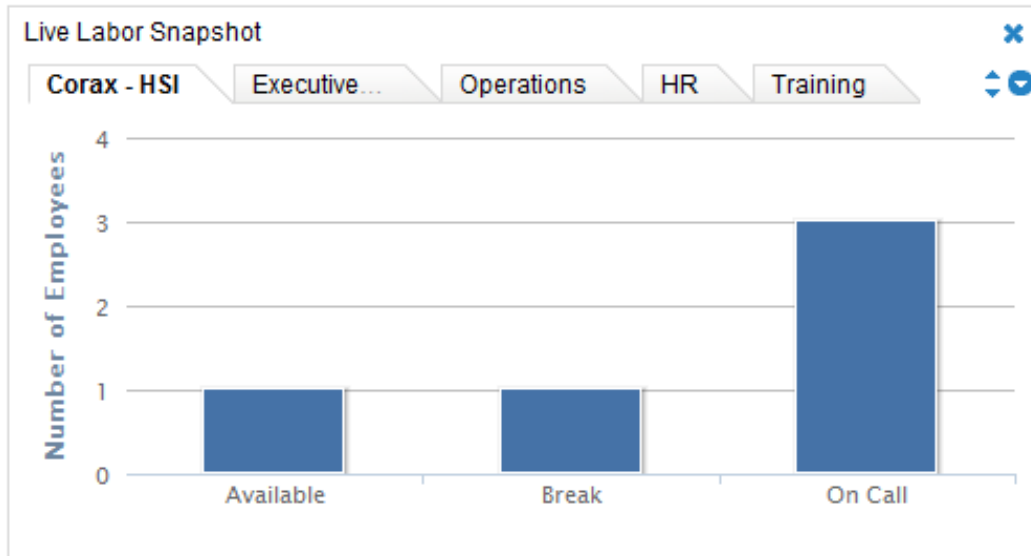


- Service Level Snapshot:** Displays how successful each Labor Unit is in meeting Service Level goals. Service Level numbers are tied to Skills and configured by your Clarity administrator. The calculation is based on the total number of calls and the percent of those calls that were answered in a specific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

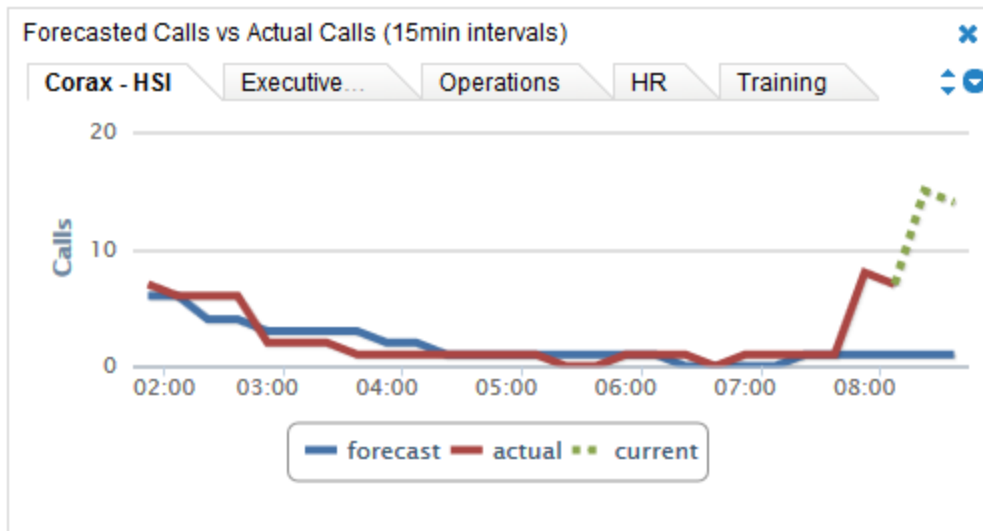


Note The Service Level Snapshot widget may require a page refresh to display the latest information.

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



- **Forecasted Calls vs. Actual Calls (15 Minute Intervals):** Display compares the number of calls forecast to the actual number of calls handled over the previous six hours.



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

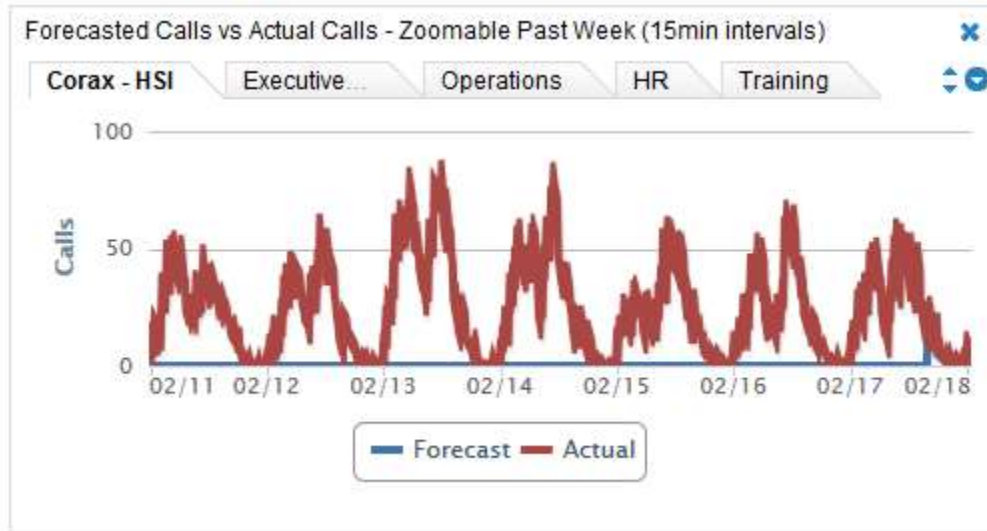
Live Project Snapshot ✕

Corax - HSI
Executive...
Operations
HR
Training
⏮ ⏪

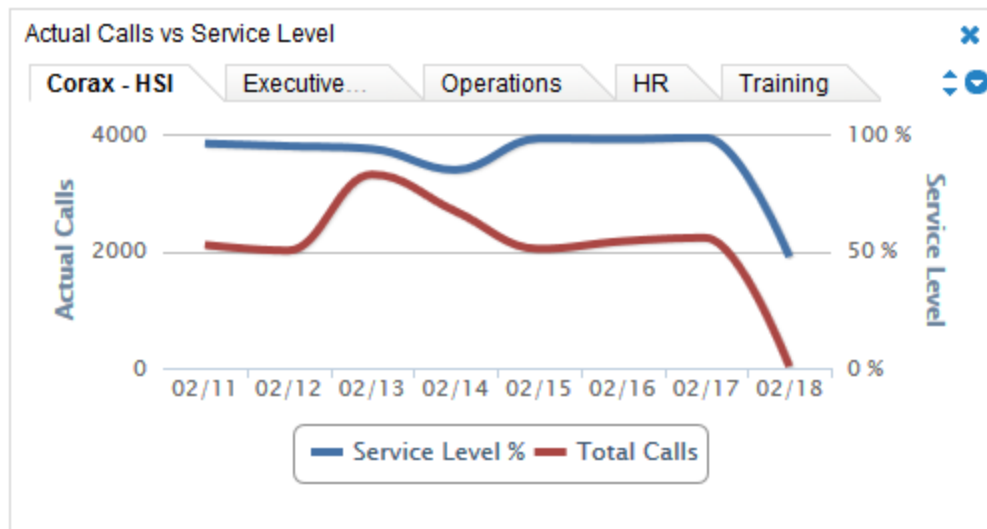
<p>Call Info</p> <p>Queued: 0</p> <p>Active: 3</p> <p>Service Levels</p> <p>Live: 98.6% AVG</p> <p>Today: 100% AVG</p> <p>Goal: 80% AVG</p>	<p>Staff Info</p> <p>Available: 1</p> <p>On Call: 3</p> <p>Call Wrap: 0</p> <p>Training: 0</p> <p>Lunch: 0</p> <p>Break: 1</p>
--	---

Historical Widgets

- **Forecasted Calls vs. Actual Calls:** Displays data for the past week. Placing the cursor over a part of either line shows the specific numbers for a 15 minute interval.



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



Ad Hoc Reports

The **Ad Hoc** button on the **Reports** tab provides users with appropriate permissions with tools to analyze data and create custom, reusable reports. Users control what data is included in a report and how that data appears. If you need to work with ad hoc reports and are unable to do so, see your Clarity administrator. Benefits of this feature include:

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

The default web.config setting limits the number of data rows returned by any ad hoc report to 30,000. This can be configured by your Uptivity Installation Team, or after installation by Uptivity Support. A warning message is displayed when results exceed this limit. There is also a 30-second time-out in the report builder. These safeguards prevent users from generating reports that would bog down the system when requesting large amounts of data. If the retrieved information is incomplete, redefine the search criteria or try redesigning the report. There is no time-out presently associated with rendering the report.

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

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 database fields including 'Agent', 'Agent Name', 'Split', 'Call Volume Data/Time', 'Interval Seconds', 'Answered Calls', 'Hold Calls', 'Ring Calls', 'Customer Seconds', 'Hold Seconds', and 'ACW Seconds'.
- Criteria:** A table with columns: Table, Field, Operator, Value, On Report, and Action. The table is currently empty with the instruction 'Drag and drop fields here to create criteria'.
- Chart Type:** A section with 'Summary' and 'Columns' options.
- Report Structure:** A section with the instruction 'Drag and drop fields here to create columns'.

The **Report Builder** is the core of ad hoc reporting, and allows you to specify a report's name, layout, format and description. It 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 selected.

In the **Fields** area, you will see all the database fields available for the selected report type. Drag and drop fields into the **Criteria** and **Report Structure** areas as needed.

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

To establish report criteria, select an operator and enter a value. Acceptable values depend on the type of data in the selected field (agent name, date, Skill, etc.). The **On Report** check box allows you to choose whether a criterion is shown in the **Report Criteria** section of the rendered/printed report.

When you save the finished report, you can also choose whether to save the criteria used to build the report. The criteria are automatically saved with the report, but this option allows you to save criteria separately that might be used to generate other reports in the future. Saving the criteria as public will make the set available to others who build ad hoc reports.

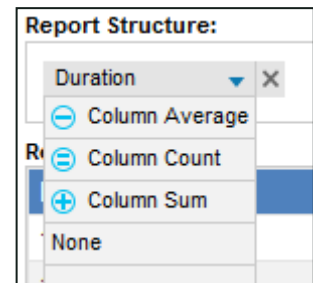
The **Chart Type** area allows you to select a chart to graphically display the data in your report. Available charts depend on the [Report Layouts](#) selected. Only icons for charts supported by the chosen layout will be displayed. Available icons appear in gray; an icon changes to color when selected.

Beneath the icons are fields that can be chosen for 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**. For vertical and horizontal bar graphs, multiple data types on both columns and rows can be selected for display. For pie charts and line graphs, only one entity in each of the **Summary** and **Column** areas may be selected.

In the **Report Structure** area, columns represent what will be X-axis labels and rows represent Y-axis labels on charts that accompany the resulting report. Fields cannot be duplicated within the row or column areas. However, the same field may be used to create both a row and a column if appropriate.

Fields can be rearranged by dragging them to a different location within the same area. Fields cannot be moved between column and row areas in summary or matrix table reports – they must be removed and re-added. The report preview will update based on changes in the **Report Structure** area.

Some fields provide additional reporting options once they have been dragged to the **Report Structure** area. Click on the downward arrow next to the field label to see these options relevant to the data type, including **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.



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. Clarity supports three types of [Report Layouts](#) and two types of [Report Formats](#).

Ultimately, the **Ad Hoc Report Builder** collates data that can be used to create multiple instances of a report using different report criteria values (e.g., date ranges). The end results are:

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

You will be presented with a list of available reports whenever you navigate to the **Ad Hoc** section of Clarity and select a report type.

Report on Employee and Call Activity

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

The list is sorted alphabetically by report name. You will be able to see any reports that you have 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.

To find a specific report, enter a search word or phrase and click **Go**, or by manually scroll/page through the list. 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.

Report Layouts

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

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

Report Structure:

Agent	Answered Calls	Service Level Calls
* Labor Unit : Corax - HSI		
315	25	18
255	25	18
305	25	18
205	25	18
235	25	18
215	25	18
245	25	18
255	25	18
265	25	18
275	25	18
285	25	18
295	25	18

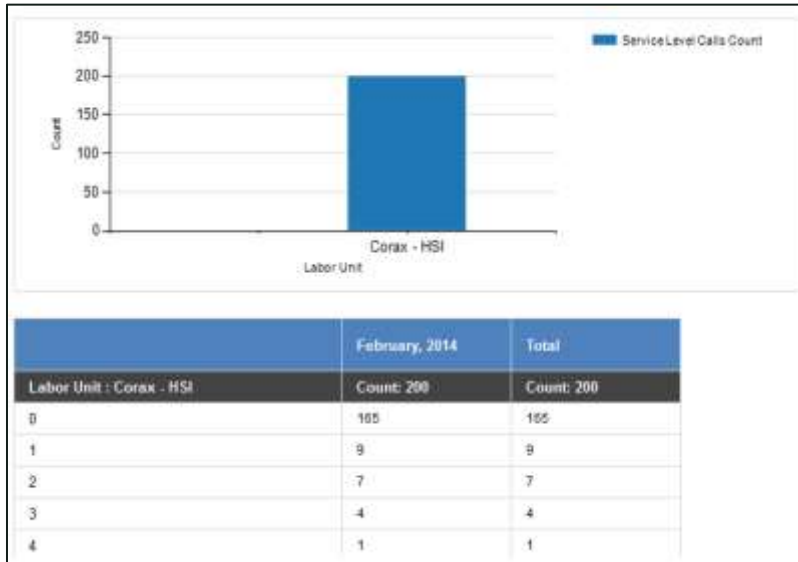
Matrix Tables measure one or more pieces of information across a period of time. Fields controlling the information to be measured and the time range are displayed in the Columns area, and are limited to one field in each area per report. Fields that control grouping of that information are displayed 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. Line charts illustrating large data sets may become difficult to read and use.

Report Structure:

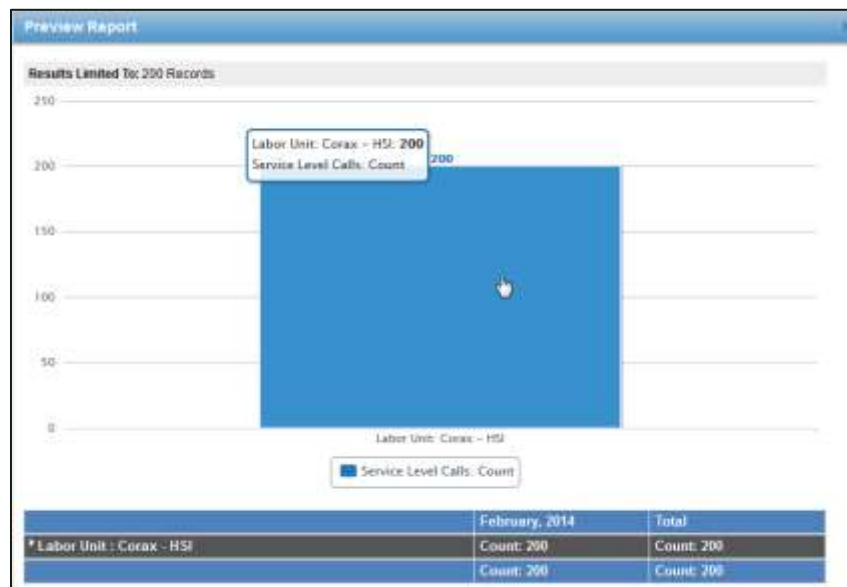
	Service Level Calls	February, 2014	Total
* Labor Unit : Corax - HSI		Count: 10	Count: 10
18	1	1	
3	3	3	
1	2	2	
0	3	3	
5	1	1	
		Count: 10	Count: 10

Report Formats

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 charts are interactive, allowing information to be displayed on mouse-over. Clicking on bars within the 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.



Report Criteria and Fields

ACD Call and Agent Data

The following attributes, entities and fields are available for ad hoc reporting on ACD Call and Agent Data. Some fields may not contain data, depending on your PBX integration.

ACD Split Call Data

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

ACD Agent/Split Call Data

Note ACD Agent/Split and ACD Agent data can be used to calculate Average Handle Time (AHT), Occupancy/Utilization, and other metrics.

- **Split:** Enter search criteria in the open-entry text box.
- **Call Volume Date/Time:** Click on calendar icon to enter search criteria using date selector.
- **Interval Seconds:** This is the time interval for which data should be pulled. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Answered Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Hold Calls:** This is the number of calls that were placed on hold one or more times. Enter search criteria in the open-entry text box; whole number values only.
- **Ring Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Customer Seconds:** This is the talk time in seconds. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Hold Seconds:** Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **ACW Seconds:** This is time spent on after-call work. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

ACD Agent Data

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

Skill

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

Labor Unit

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

User

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

Team

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

Service Level

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

Agent Leave/PTO

The following attributes, entities and fields are available for ad hoc reporting on Agent Leave and PTO.

Leave Requests

- **Leave Type:** Enter search criteria in the open-entry text box.
- **Date Created:** Click on calendar icon to enter search criteria using date selector.
- **Start Date:** Click on calendar icon to enter search criteria using date selector.
- **End Date:** Click on calendar icon to enter search criteria using date selector.
- **Leave Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Comment:** Enter search criteria in the open-entry text box.
- **Status:** Enter search criteria in the open-entry text box.
- **Approved By:** Enter search criteria in the open-entry text box.

Agent

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

Team

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

Labor Unit

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

Skill

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

Shift

The following attributes, entities and fields are available for ad hoc reporting on Shifts.

Shift

- **Agent Name:** Enter search criteria in the open-entry text box.
- **Shift Start:** Click on calendar icon to enter search criteria using date selector.
- **Shift End:** Click on calendar icon to enter search criteria using date selector.
- **Shift Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Activity:** This is the type of activity (e.g. lunch, meeting, training, break, etc.) Enter search criteria in the open-entry text box.
- **Activity Start:** Click on calendar icon to enter search criteria using date selector.
- **Activity End:** Click on calendar icon to enter search criteria using date selector.
- **Activity Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Is Paid:** Reports display as Yes or No. Search criteria values are presented in drop-down list: All, Yes, No.
- **Late Threshold:** Enter search criteria in the open-entry text box; numeric values only.

Labor Unit

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

Skill

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

Team

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

Create an Ad Hoc Report

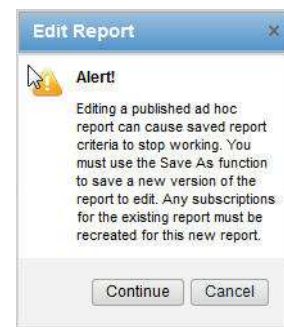
To create a new report:

1. Click on the **Reports** tab, then on the **Ad Hoc** button.
2. Select the desired category of reports from the drop-down list.
3. Click on **Create a Report** in the upper right corner.
4. Enter a name for the report as you want it to be displayed in the listing of available reports.
5. Enter a description (optional) of up to 100 characters.
6. Choose from the drop-down list of [Report Layouts](#).
7. Choose from the drop-down list of [Report Formats](#).
8. Drag the desired fields into the **Report Structure** area. To remove a field, click the X on the field label.
9. Set any additional reporting options if desired. For related information, see [Ad Hoc Report Builder](#).
10. Drag any desired fields to the **Criteria** section and click **Save** to apply changes or update the report preview.
11. Set **Chart Type** options if desired.
12. Click **Preview** to see in a pop-up window how the report and chart (if applicable) will appear when rendered.
13. Click **Cancel** to return to editing the report in the **Report Builder**.
14. When you are finished creating the report, click **Save**. To discard changes and return to the main Ad Hoc Reporting page, click **Cancel**.

Edit Existing Ad Hoc Reports

Editing a saved ad hoc report can be used to:

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



Editing an existing report can cause saved report criteria to stop working. Best practice is therefore to use the **Save As** function to save a new version of the report for editing.

Report on Employee and Call Activity



The screenshot shows the 'Report Builder' window. At the top, there are six buttons: 'Generate Report', 'Preview', 'Cancel', 'Save As', 'Save', and 'Publish'. Below the buttons are four input fields: 'Report Name' (containing 'Monthly Evals'), 'Layout' (a dropdown menu showing 'Matrix Table'), 'Reporting Format' (a dropdown menu showing 'RDL'), and 'Description' (containing 'Evaluations completed per group, per').

Editing is performed in the Report Builder, but as shown above, new options become available when you are working with a previously-saved report:

- **Generate Report** returns you to the main view for that report. Click **Generate Report** again to see the report as it will appear when rendered.
- **Preview** launches a pop-up window showing the report as it will appear when rendered.
- **Cancel** allows you to leave this area and return to the main ad hoc reporting screen.
- **Save As** opens the Save Report dialog box, allowing you to retain the original report and save a new report in a separate file. The report name must be unique. The dialog box presents options for saving report criteria as public or private.
- **Save** updates the existing report with any changes you've made. If the name is changed, clicking Save updates the existing report with the new name. The option to save criteria for the report is not presented. After saving, click **Cancel** to return to the main ad hoc reporting screen.
- **Publish** opens the Publish Report dialog box. If you want to change the name of the published report, you may do so here. If there is already a published report with your chosen name, you will be prompted to choose a unique report name. After publishing, click **Cancel** to return to the main ad hoc reporting screen.

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

To edit an ad hoc report:

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

Generate an Ad Hoc Report

Once an ad hoc report has been saved, it can be generated in multiple iterations using different search criteria (e.g., date ranges, user names). You can **Save Criteria** to make your criteria selections available for future use. The **Save Criteria** dialog box allows you to name the criteria set and designate it for public or private use. Only the criteria parameters originally saved with the report will be available. To add new criteria or change the operators for existing criteria, you must manually edit and resave the report. For details, see [Edit Existing Ad Hoc Reports](#).

The **Saved Search Criteria** section will display any criteria you may have saved previously and any criteria saved as public by other users. Double-click on saved search criteria to apply those selections to this report. Both the **Search Criteria** and **Saved Search Criteria** sections can be expanded or collapsed as needed.

Generated reports appear onscreen with a control bar that lets you take the following actions:



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

Forecast Call Volumes

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

Note Clarity timestamps WFM events based on the time and time zone of the switch from which it receives data. If two call centers in different time zones feed through the same switch, Forecasting data may be inconsistent, skewed toward the region where the switch resides.

Forecasting involves these tasks:

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

Call volumes change for these factors:

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

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

Follow these tips for creating forecasts:

- Develop a naming convention for forecasts, forecast data sets, and schedules before creating any of them. A naming convention is especially useful if multiple managers create and share these items.
- Multiple forecasts may be needed for the same time period in order to determine which one best predicts call volumes. Each of these forecasts may use different data or the same data. The same adjustments or different adjustments may be made to the data sets.
- Track data and adjustments made to create a forecast, so reasons behind forecast differences are clear.
- Use data from a period that is 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 the launch of a new product, identify a period when that group or another group handled calls for a product launch.
- Compare forecasts to actual call volumes to identify strengths and weaknesses in the process.
- Clarity lets you create forecasts with any amount of data, but not having enough data available can cause the application to return unexpected results. A best practice is to acquire data for at least two weeks before creating a forecast.

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

Import Data from a File

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

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

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

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

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

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

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

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

Create a Historical Call Volume Set

Select Data from Devices

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

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

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

Select Data from an Existing Data Set

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

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

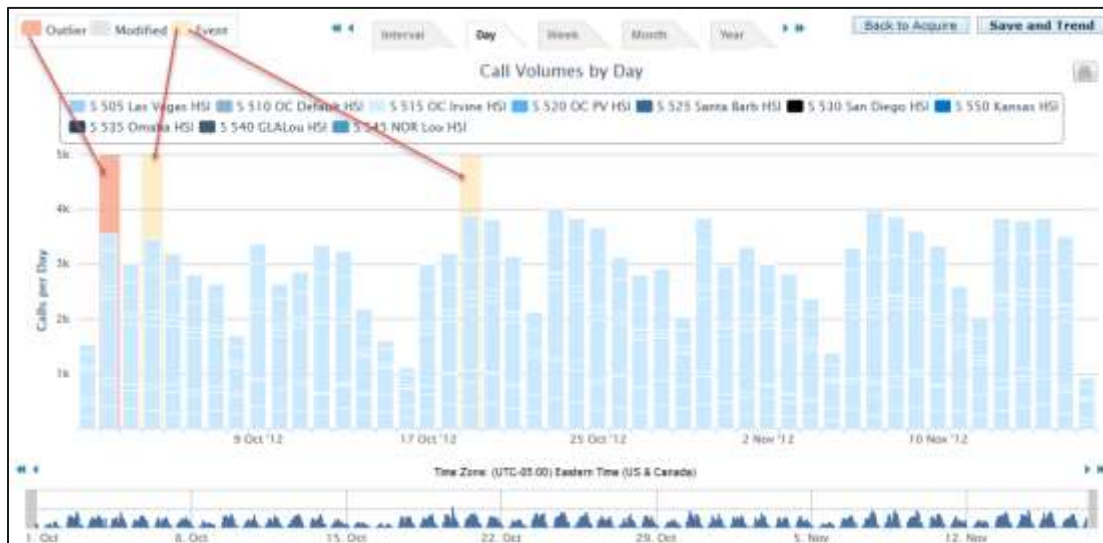
To create new call volume data set from an existing data set:

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

Modify a Historical Call Volume Set

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

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



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

- **Skills key:** A Labor Unit's Skills appear above the bar chart, with each Skill having its own color code. The color of the bands will change to indicate each Skill as you mouse over it, so you can easily see all columns on which that Skill is represented. Clicking on 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 on the bar and drag to another area on the bar. For example, to see calls for two days, click the **Day** tab, then drag the cursor over the specific two days you wish to view.

- **Arrow navigation buttons:** The <- and -> buttons change the data columns displayed (i.e., either earlier or later data).

Manually Modify Data

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.

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

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

Data can be modified by:

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

To manually modify data in a displayed data set:

1. Click the desired Time Unit tab.
2. Click the data column to be modified, or shift-click to select a range.
3. Right-click the selected column(s).
4. Select **Modify Selected**.
5. Adjust the starting and ending dates and times if needed. The ending date/time should be set to the first interval following the range to be modified; it will not be altered.
6. Select the desired skills from the **Selected Skills** drop-down menu.
7. Select the desired **Modifier**.

8. For **Value**, select **Increase** or **Decrease** from the drop-down list and enter the number of calls or percent by which to adjust the call volume.
9. Enter a comment under **Modification Reason**.
10. Click **Save** to commit the changes.

Auto-Correct Selected Data

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

To auto-correct data in a displayed data set:

1. Click the desired Time Unit tab.
2. Click the data column to be modified, or shift-click to select a range.
3. Right-click the selected column(s).
4. Right-click the data column.
5. Select Auto-correct.

Add Events to Data

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

Adding an event on any level will add it to all affected levels. For example, if you add the event Spring Sale at the **Month** level, that event will also appear for every week in the **Week** level, day in the **Day** level, etc. You can clear an event from a single data column without removing it from others on that level by right-clicking on the column and selecting **Clear events from selected**.

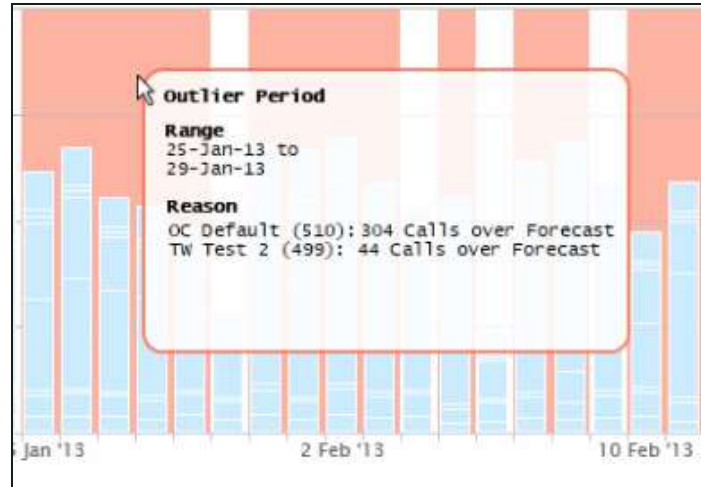
To add an Event to a selected data column in a displayed data set:

1. Click the desired Time Unit tab.
2. Click the data column to be modified, or shift-click to select a range.
3. Right-click the selected column(s).
4. Select **Add event to selected**.
5. Select an event type from the list box or select **New Event Type** to add a new one.
6. Enter a comment.
7. Click **Add**.

Auto-Correct Outliers

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

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



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

To automatically modify outliers in a displayed data set:

1. Right-click anywhere within the **Calls per Day** graph.
2. Select **Auto-correct outliers**.

Undo/Revert Changes

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

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

Click **Revert selected** to undo changes to only the selected columns. Click **Revert all** to undo all changes.

Save the Modified Data Set

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

1. Click **Save and Trend**.
2. Enter a name for the data set. The system automatically appends the date to the end of the name when the file is saved.
3. Click **Save**. After the data is saved, the trend can be analyzed.

Create a Call Volume Forecast

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

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

Review the Call Volume Trend

Note This task can be skipped if you are satisfied with the data set you have created.



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

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

To review the call volume trend for a data set:

1. On the **Forecast** tab, click **Trend**.
2. Select a data set from the drop-down list and click **Next**.

Forecast Call Volumes

3. If you feel the trend adequately reflects historical performance, click **Continue to Predict**. If not, click **Back to Trend** to trend another existing data set or **Acquire** to create a new historical data set. For related information, see [Create a Historical Call Volume Set](#).

Predict Call Volume

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

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

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

To predict call volume based on an existing data set:

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

Modify the Predicted Call Volume Data

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

- Modifications can only be made at the Interval level. If you attempt to Modify selected from a different time unit, Clarity will change the view for you.
- You can add events but the only events available will be those you created on the **Acquire** screen for this forecast. Adding an event on any level will add it to all affected levels. For example, if you add the event Spring Sale at the **Month** level, that event will also appear for every week in the **Week** level, day in the

Day level, etc. You can clear an event from a single data column without removing it from others by right-clicking on the column and selecting **Clear events from selected**.

Schedule Employees

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

There are three steps in the Clarity scheduling process:

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

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

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

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

Notes

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

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

Schedules can be created for days in the past.

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

Manually Create a Schedule without a Forecast

Last name	First name	Sun Feb 16	Mon Feb 17	Tue Feb 18	Wed Feb 19	Thu Feb 20	Fri Feb 21	Sat Feb 22
CONTRERAS	KRISTINE				10:00-18:30	10:00-18:30	10:00-18:30	10:00-18:30
DOE	JANE				09:00-17:30	09:00-17:30	09:00-17:30	
DOE	JOHN				09:00-17:30	09:00-17:30	09:00-17:30	
FALK	KEN				10:00-18:30	10:00-18:30	10:00-18:30	10:00-18:30
GIBBS	REGINALD				10:00-18:30	10:00-18:30	10:00-18:30	10:00-18:30
JUAREZ	ERIK				10:00-18:30	10:00-18:30	10:00-18:30	10:00-18:30
KEMP	MARI				10:00-18:30	10:00-18:30	10:00-18:30	10:00-18:30

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

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

- **Shift Templates.** Templates available for the employee's Labor Unit appear on the employee's scheduling grid. To use one, drag it to the desired starting date/time on the grid. Template activities can be changed as needed. Some Shift Templates require certain activities. In this case, click in the narrow white strip to the right of the blue time block to assign sub-blocks of time to an activity. Double-click a sub-block to change the activity.
- **Manually.** You can manually draw hours on the employee's scheduling grid by clicking individual cells in the graph, or by clicking and dragging the cursor over multiple cells in a single day (i.e., column). You can also click the double line at the bottom of a time block and drag down to extend the block. Right-click on a time block to delete it.
- **Ad Hoc Templates.** Draw hours manually, then right-click on the block and select **Copy to Templates**. An entry for the shift appears under **Shift Templates**. To use this template, drag it to the calendar.

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

Create a New Schedule Entry

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

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

Create a Schedule

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

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

Note If you do not wish to publish the schedule at this time, you can simply click on 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**.

Edit a Schedule

Employee's schedules can be edited from the list by right-clicking on the cell containing the shift to be edited and selecting an option from the context menu. Menu choices are:

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

Automatically Generate a Schedule Using a Forecast

Last name	First name	Sun May 4	Mon May 5	Tue May 6	Wed May 7	Thu May 8	Fri May 9	Sat May 10
Adaba	Isaac		06:30-14:30	05:00-13:00	02:30-10:30	01:30-09:30		
Ansoath	Barbara		08:00-16:00	05:30-13:30	02:00-10:00	00:00-08:00		
Anderson	Brad		15:30-23:30					
Arza	Ashli	14:30-22:30						
Bar	Ray			10:30-23:30				

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

- If employees belong to multiple Labor Units, Clarity identifies them. Clarity cannot create schedules for the other labor units to which they belong. If this limit is a problem, you can cancel at this point.
- Employees who are already scheduled are identified in a message box. This sometimes occurs when employees are in multiple Labor Units. If adding additional hours to their schedule will create a problem, you can cancel the procedure at this point.
- The Labor Unit must have employees assigned to it for the scheduling process to work.

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

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

Scheduler Process

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

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

Schedule Employees

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 on the Stop Schedule Generation button, the Scheduler will finish its current Optimizing activity, save the results, and then stop. The display will toggle between Stopping and Optimizing until this is complete.
- **Error:** If an error occurs during the process, in either the web interface or the Scheduler service, an error message will display and also be entered in the Scheduler service logs.

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

Create a New Schedule Entry

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

1. On the **Schedule** tab, click **Load**.
2. Enter a name for the schedule entry.
3. Select a call volume forecast data set from the list.
4. Select one or more Labor Units. The Labor Unit must have employees assigned to it for the scheduling process to work.
5. Click **Next**.
6. If the forecast is acceptable, click **Continue to Create** to create the schedule.

Sometimes factors that affect call volumes may have changed since the time 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 Schedule

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

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

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

View Schedule

If you remain on the Schedule page while the Scheduler service is running, the schedule will load with **View Schedule** as the default tab view once the process is complete. **View Schedule** is also the default tab view when you click a schedule link from the Scheduler widget on your Home tab. In addition to viewing the schedule and any Labor Rule violations (if applicable), you can also edit an individual employee's schedule from this tab.

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

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

Overtime for Period

The **Overtime for Period** tab appears with schedules that have been manually created as well as schedules that are automatically generated. This tab displays any employees currently scheduled with overtime hours. The list is sorted by Labor Unit and can be useful for making necessary scheduling adjustments.

Note Keep in mind the following system behaviors when figuring overtime calculations:

- 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

Notes

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

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

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

Depending on the size of the Labor Unit, historical data, and other factors, Over/Under reports can take some time to process. When you begin, Clarity will ask whether you'd like to be notified by email or text message once the information is ready. You may select both notification methods, or you may select neither method. The system will use the email address and/or cell phone number in your Clarity employee record. SMS must be enabled for your account to use text notifications.

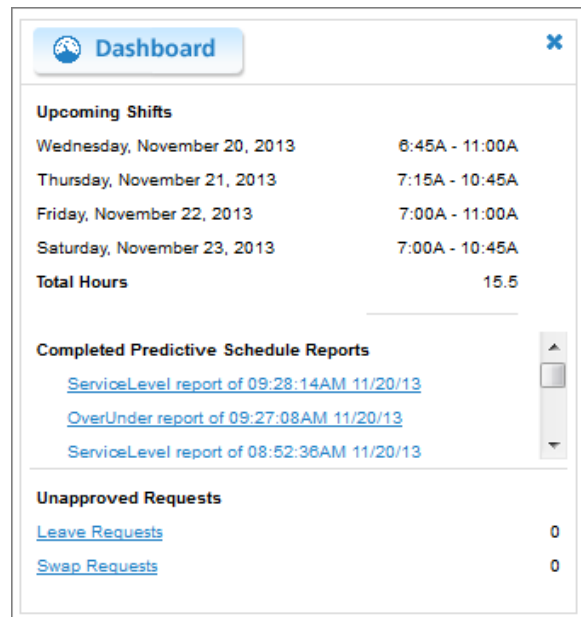
You may proceed with other activities while the report is processing. If you click away from the **Over/Under Staffing** tab and return to it before the report is complete, a pop-up will appear and give you the opportunity to cancel. You will not be able to save and publish the schedule until over/under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

To create an Over/Under report:

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



Completed Over/Under reports are accessed from your **Home** tab. Click on the report link under **Completed Predictive Schedule Reports** in the **Scheduler** widget.

Note: You may need to add the **Scheduler** widget by clicking on the **Add Widget** link on your **Home** screen.





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



- Data is grouped by Labor Unit and within Labor Unit, by Skill. This allows you to more easily determine the agents and schedules to change in order to positively impact over or under staffing.
- Information is color coded. Red indicates periods that are understaffed. Orange indicates periods that are overstaffed.
- The default information view shows over/under information in a numerical format based on fulltime equivalents (FTEs). For example, the screen above shows that at 12:00:00 AM, the "S 511 OC Default VT" skill is overstaffed by 3.00 FTEs.
- To change to a graphic view which simply shows colored "over" or "under" staffing bars, click on the  icon. To return to the numerical format, click on .



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

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

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

Service Level

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

Depending on the size of the Labor Unit, historical data, and other factors, Service Level reports can take some time to process. When you begin, Clarity will ask whether you'd like to be notified by email or text message once the information is ready. You may select both notification methods, or you may select neither method. The system will use the email address and/or cell phone number in your Clarity employee record. SMS must be enabled for your account to use text notifications.

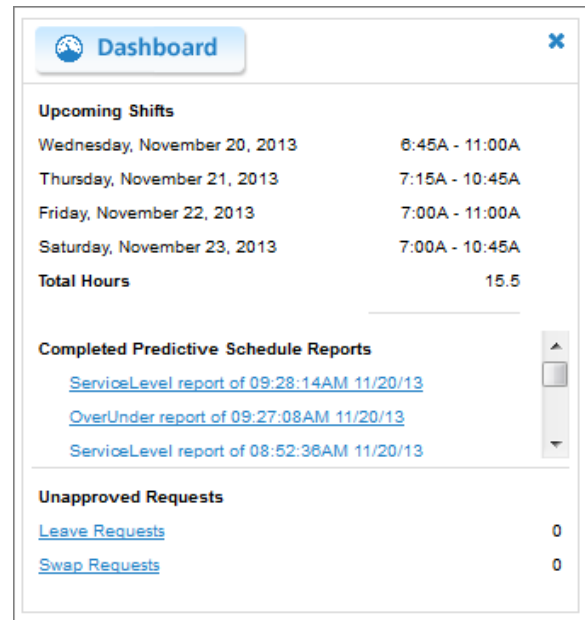
You may proceed with other activities while the report is processing. If you click away from the **Service Level** tab and return to it before the report is complete, a pop-up will appear and give you the opportunity to cancel. You will not be able to save and publish the schedule until service level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

To create a Service Level report:

5. Click on the **Service Level** tab.
6. Check one or both **Notification Methods** if desired.
7. Click **Yes**.
8. In the **Confirm** pop-up box, click **Wait**.

Completed Service Level reports are accessed from your **Home** tab. Click on the report link under **Completed Predictive Schedule Reports** in the **Scheduler** widget.

Note: You may need to add the **Scheduler** widget by clicking on the **Add Widget** link on your **Home** screen.



The screenshot shows a dashboard window titled "Dashboard" with a close button in the top right corner. The dashboard is divided into several sections:



- Upcoming Shifts:** A table listing shifts for the week of November 20, 2013. The total hours for the week are 15.5.
- Completed Predictive Schedule Reports:** A list of three reports with links to view them.
- Unapproved Requests:** A summary of unapproved requests, showing 0 leave requests and 0 swap requests.

Upcoming Shifts	
Wednesday, November 20, 2013	6:45A - 11:00A
Thursday, November 21, 2013	7:15A - 10:45A
Friday, November 22, 2013	7:00A - 11:00A
Saturday, November 23, 2013	7:00A - 10:45A
Total Hours	15.5



Unapproved Requests	
Leave Requests	0
Swap Requests	0

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

View Schedule		Overtime For Period		Over/Under Staffing		Service Level		Under Goal		Over Goal		Weekly View		Daily View	
Time Zone: (UTC-05:00) Eastern Time (US & Canada)		Jun 2, 2014		Interval		Today		Back to Create		Save and Publish					
Cox Communications Data															
S 511 OC Default VT	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					
	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%	81.49%	88.00%	88.00%	88.04%	88.04%					

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



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

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

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

Publish a Schedule

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

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

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

To publish a schedule:

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

Undo Publish Schedule

To remove a published schedule:

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

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

Export a Schedule

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

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

Schedule Bidding

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

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

- Schedule Bidding can support both manually-created and automatically-generated schedules.
- Agents can bid on a set of shifts they prefer rather than simply being assigned a schedule.
- Workforce administrators can award schedules to bidding agents based on their quality scores, performance rankings, and other criteria, and these criteria can be modified as business needs change.
- Workforce administrators control the period of time during which schedules are available for bidding.
- Through Clarity permissions, application administrators can control which employees are able manage Schedule Bidding, and which agents are allowed to bid on schedules.

Agent Ranking Criteria

Clarity allows you to 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 sets of criteria. Available criteria are:

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

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

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

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

The screenshot shows a configuration window titled "Criteria:". It contains three rows of criteria, each with a checkbox, a label, and a percentage input field. The first row is "User Account Age" with a value of "0". The second row is "Average Handle Time" with a value of "0". The third row is "QA Score Average" with a value of "0". Below these are two input fields for "Start Date" and "End Date". At the bottom are two buttons: "Cancel" and "Save".

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

You may also see a scenario where criteria data is present for some, but not all, of the agents in the Labor Unit. For example:

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

Create Agent Ranking Criteria

To create a set of criteria for agent ranking:

1. Click the **Schedule** tab.
2. Click the **Bidding** button.
3. Select **Manage Agent Ranking Criteria** from the drop-down list of options.
4. Click **New Criteria Set**.
5. Enter a meaningful name for the criteria set so you can easily identify it.
6. 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. Shift-click or CTRL-click to make multiple selections.
7. Check the **Criteria** you wish to use and assign weights if desired.
8. Enter the **Start Date** and **End Date** for the criteria period.
9. Click **Save**.

Please select an option:		
Manage Agent Ranking Criteria		
Agent Ranking Criteria New Criteria Set		
Name	Edit	Delete
Tech Set	Edit	Delete
Billing Set	Edit	Delete
Admin Set	Edit	Delete

Edit Agent Ranking Criteria

To edit an existing set of criteria for agent ranking:

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

Delete Agent Ranking Criteria

To delete an existing set of criteria for agent ranking:

1. Click the **Schedule** tab.
2. Click the **Bidding** button.
3. Select **Manage Agent Ranking Criteria** from the drop-down list of options.
4. Click **Delete** next to the desired criteria set.
5. Click **OK** in the warning message dialog to permanently delete the set.

Bidding Schedules

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

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

The following factors should be considered in advance as they may impact your Bidding Schedules.

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

Manually-Created Bidding Schedules

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

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

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

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

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

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

Manually Create a Bidding Schedule

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

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

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

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

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

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

Automatically-Generated Bidding Schedules

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

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

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

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

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

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

Generate a Bidding Schedule Automatically

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

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

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

Sometimes factors that affect call volumes may have changed since the time 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.

Schedule Bidding

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

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

Note Click **Save and Initiate** if you want to continue with the next step in the Schedule Bidding process; see [Initiate a Bidding Period](#). If you do not wish to initiate the Bidding Period at this time, simply click on 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.
2. Click the **Bidding** button.
3. Select **Manage Bidding Schedules** from the drop-down list of options.
4. Click the **Edit** button next to the desired schedule.
5. Edit the schedule as needed.
6. Click **Save** or **Save and Initiate**.

Note Click **Save and Initiate** if you want to continue with the next step in the Schedule Bidding process; see [Initiate a Bidding Period](#). If you do not wish to initiate the Bidding Period at this time, simply click on 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.
2. Click the **Bidding** button.
3. Select **Manage Bidding Schedules** from the drop-down list of options.
4. Click the **Delete** button next to the desired schedule.

Award a Bidding Schedule

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

Please select an option:
Award Bidding Schedules

Award Bidding Schedules

Hide Awarded Save Publish

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

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

Select an agent to review bids and award a schedule.

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

To award a Bidding Schedule:

1. Click the **Schedule** tab and then click the **Bidding** Button.
2. Click the **Award** button next to the desired schedule.
3. Select a **Criteria Set** from the drop-down list (if desired) and click **Apply**.
4. Click the **Award** button next to a desired shift to award it to that agent.
5. Click the **Select** button 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.
2. Click the **Bidding** Button.
3. Click the **Award** button next to the desired schedule.
4. Click the **Select** button next to the agent(s) whose shift(s) you wish to change.
5. Click the **Undo Award** button.
6. Click **Save**.

Publish Bidding Schedule Awards

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

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

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

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

To publish Bidding Schedule awards:

1. Click the **Schedule** tab.
2. Click the **Bidding** Button.
3. Select **Award Bidding Schedules** from the drop-down list.
4. Select the desired **Bidding Schedule** from the drop-down list and click **View**.
5. Click the **Select** button next to any agent to load the awarded shifts.
6. Click the **Publish** button.
7. Click **Proceed**.
8. Select the desired schedule from the drop-down list.
9. Select a notification method if desired.
10. Click **Publish**.
11. Click **Override** if applicable and then click **OK**.

Undo Publishing a Bidding Schedule Award

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

Bidding Periods

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

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

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

Initiate a Bidding Period

To initiate a Bidding Period:

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

Manually Close a Bidding Period

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

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

About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance? Only Uptivity gives you the tools you need to continuously improve every aspect of each step of every agent's life cycle and enhance customer satisfaction. You get exactly what you need thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value, and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at www.uptivity.com