uptivity

cc: Clarity User Manual, v5.3

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Distribution: Approved internal Uptivity staff only and licensed Uptivity customers.

Note: Applicable non-disclosure agreements must be in force for authorization.

Revision History		
Revision	**Change Description**	**Effective Date**
0	Added links/references for Historical, Process, and Ad Hoc reports. Noted that Live Monitoring requires cc: Discover. Noted behavior when predicting overtime for a period. Noted Daylight Saving Time change behavior when creating schedules without a forecast. Added sections on Over/Under and Service Level reporting.	2013-12-06

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Introduction

This manual is for cc: Clarity managers and agents.

To work with this software, users should have basic Windows personal computer skills such as

- Logging into a network and an application
- Using a mouse to start an application and navigate
- Working in a Web browser

Users also need a cc: Clarity user account and password.

Login and Communicate with cc: Clarity

This chapter explains how to login and use the cc: Clarity Home tab to communicate employee information, schedules, and news.

Login

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

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

Follow these steps to login:

1. In Internet Explorer, type the URL (hostname or IP address) of the site into your browser's address bar. (http://callcopyserver.yourcompany in this example.) The login page appears.
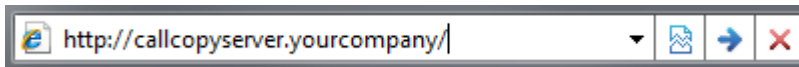
2. Enter your cc: Clarity user name.

   > **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 cc: Clarity password.

   > **Note** Passwords are case sensitive.

4. Click **Login**. cc: 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 the Caps Lock is not on.
- Check that you have the correct username, password, and login mode.

> **Note** If you fail to login 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.

Forgot Password Feature

Note This feature does not work if your account has been locked due to login failures.

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." Please contact your cc: Discover system administrator to resolve this issue.

Locate Version Number

The version number for your cc: Clarity software appears in the upper-right corner of the login page. It also appears if you place the cursor over the CallCopy icon. This version number can be useful for locating correct documentation for your software and when obtaining support for your system.

Change Your Password

Follow these steps to change your password:

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

Log Out

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

User Settings: Update Viewing Time Zone

By default, cc: Clarity displays time based on the user's 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, click **User Settings** from any page. Select a time zone from the drop down menu and click **Save**. This time zone remains in effect until changed again by the user.

Update My Employee Information

Employees can see if their cc: Clarity account information is inaccurate and update it if necessary. Additional information can be found with the employee's schedule. Users can be granted permission to update some of their employee information. Some fields, such as username, cannot be edited.

1. In the account information area, click **Edit**. The Edit Employee Information box opens.
2. Edit each field as needed. – See the "Create an Employee" section of the *cc: Clarity Administration Manual* for definitions of the account information.
3. Click **Save**. (If changes are not needed, click the X in the top right corner of the Edit Employee Information box.)

Add or Remove a Widget

Widgets can be added, removed, or re-added as needed. Widgets can be moved around the Home tab by clicking on the top of the widget and dragging. Changes made to the Home tab are saved when the employee logs out. The next time the employee logs into the system the tab appears just as it was left.

Widget settings are configured on the Configuration page.

Follow these steps to add a widget:

1. Click the **Add widget** link.
2. Each tab has different widgets available. Select a widget.
3. Click **Add**. The widget appears on the tab.

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

Users have to refresh the cc: Clarity page in order to receive widget information updates.

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

News Widget

The News widget displays announcements and the number of days since the announcement was posted. This feature reduces the number of emails users receive by sending postings 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, click **Add News**. Enter the announcement text in the dialog box and press Enter for line breaks. Click **Add** to post the entry.

To edit or remove a posting, click the posting's **Edit** link. In the dialog box, either edit the text and click **Update** OR click **Remove**. Editing a message does not change the posting date.

Twitter Widget

Users can receive tweets from one Twitter account. This feature allows supervisors to communicate to employees both internally and externally using the same tool.

Facebook Widget

Users can see text postings to a Facebook account but no images.

Dashboard Widget

All users have a default dashboard 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 link to open a page listing the requests.

View Schedule

An employee's schedule can be viewed either from the Home tab (only their own schedule) or by searching for an employee under the Employees tab, and then clicking **View Schedule**. The Employees tab displays the schedule using the current day's date. Users can:

- Click the Monthly, Weekly, and Daily tabs to view the schedule.
- 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 day in the month to go to that day; click an event in **Weekly** view to zoom to **Daily** view.
- Right-click a schedule entry to see details and options.
- Navigate to a specific date by clicking **View Date** and selecting a day on the calendar.
- Specify which items appear on the schedule by selecting items from the Activities and Leave Requests drop-down menus.

If a change request requires approval, the pending requests appear on the supervisor's Home tab and Reports > Processes page and from there can be approved, declined, or changed.

Request Leave

Leave requests can be submitted by either an employee or their supervisor. System administrators define the request types and whether a request must be approved by a supervisor. A user receives an email when the request is approved or rejected. Users cannot cancel requests after they have been submitted. Time off cannot be requested on a day when no shift is scheduled.

1. Under the Monthly tab of the schedule, right-click the schedule time block or a date on the calendar. The **Request Leave** dialog box opens.
2. In the **From:** and **To:** fields, select the starting and ending date and time of the leave, down to 15-minute increments. If only one day is needed, put the same date in both fields with the corresponding start and end times.
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**.

Request Shift Swap

Employees with the same skill or skills can request to take other employees' shifts or 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.

1. On the employee's schedule page, under the Weekly or Daily tabs, right-click the schedule time block that will be given to another employee.
2. Click **Request Swap**. This option only appears for future shifts or shifts currently in progress.
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. An email is sent to the requestee 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.

Call Off

Supervisors may refer to the Leave Request Types Configuration page for the call off rules. Clicking Call Off marks the days as such. If the call off must be approved by a supervisor, click **Approve** and add a comment. The comment appears in the email sent to the employee. To call off:

1. Navigate to the date for the call off.
2. On the **Monthly** tab, right-click in the blank space on that date, or in the **Weekly** or **Daily** tabs, right-click on the shift on that date to call off.
3. Click the **Call Off** button.

The request enters a pending status to be approved by the supervisor and the call off request is displayed on the employee's calendar.

Saveable Search Filters

When performing searches in the employee roster, Overview report, or Adherence report, custom search filters can be built and saved so users do not need to enter criteria every time they want to conduct a search.

In cc: Clarity, 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.

To save a custom filter, select the necessary criteria, then click **Save Criteria**. A dialog will prompt for a name for the filter, whether access to the filter is public or private, whether this should be set as the default filter, and whether the filter should be saved over the currently applied filter or as a new filter.

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. If a default filter is set and it's necessary to search without filtering results or to start building a new set of criteria, click **Clear**.

To apply a filter from the list, click **Apply**. To remove a filter from the system, click **Delete**.

Real Time	Historical	Overview	Adherence	Processes	Ad-Hoc

▼ Saved Search Criteria

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

▼ Search Criteria

First name:		Employee ID		Clear	Search
Last name:		Labor Unit:	Supervisors		
Title:	Select Title	Teams:	Select Team		
Location:	Select Location	Active/Inactive:	Active	Save Search Criteria	

Manage Employees

This chapter is for supervisors and system administrators.

> **Note** The results of some tasks may not appear until after a cc: Clarity page has been refreshed.

Search for Users

For information on saving search criteria, see Saveable Search Filters. Follow these steps to view or edit a user account or schedule:

1. Click the **Employee** tab.
2. Click **Search**.
3. Enter one or more criteria that identify the employee profile(s). (There are no wild cards for partial searches.)
4. Click the smaller **Search** button.
5. A list of employees matching the criteria appears:

   - To view one employee, find the employee in the list and click **View** for that item.
   - To view all employees, click **Expand All**. Click **Collapse All** to reverse this action.

Change an Employee's Account Information and Password

1. Locate the user in the Search Results list.
2. Click **Edit**.
3. 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 *cc: Clarity Administration Manual* for definitions of the fields.)
4. Click **Save**.

View an Employee's Schedule

For additional schedule instructions, see View Schedule.

Follow these steps to view an employee's schedule:

1. Locate the user in the Search Results list.
2. Click **View Schedule**.
3. The schedule appears in a new page.

To return to the search list, click the back button (the left arrow) in the top left corner of the Web browser.

Manage Leave Requests, Shift Swaps, and Call Offs

Supervisors can submit or approve leave requests for employees, approve shift swap requests, or mark an employee's time as call off if the employee does not report for work or notifies the supervisor that he will not report. If employees have email addresses entered on their account, they will receive emails when call offs are recorded, requests are made for them, or requests and swaps are approved.

Requests and approvals are made from the employee's schedule. Locate the user in the **Search Results** list, and then click **View Schedule**. From the **Monthly** tab view, right-click on a day to view shifts and activities, the option to Call Off or Request Leave, approve/deny links for Leave and Swap requests, and for future days, a link to request a Shift Swap.

More details are available in the section "View Schedule."

Edit an Employee's Schedule

Follow these steps to edit an employee's schedule after the schedule has been published.

1. Locate the user in the Search Results list.
2. Click **View Schedule**.
3. Switch to the **Edit** tab. Locate the day to be edited.
4. Click the schedule block and edit as necessary: drag it to another time or day, shrink it, or add an activity.
5. Click **Save**.

Approve/Decline Multiple Employee Requests

Supervisors may have to approve employee requests for leave or shift swaps, depending on the leave request type configuration settings. 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.

Follow these steps to change a request's status:

1. Click the Reports tab > Processes.
2. The Processes page displays all current and past requests. Use the search criteria fields to search for a specific request. Or use the sort triangles at the top of the request table columns.
3. Locate the request and click one of the status options:

   - Approve
   - Decline
   - Pend – Requests start in pending status and can be switched to pending after being approved or declined.

4. In the Comments box, enter any relevant comments. The employee will be able to view these comments in an email.

Report on Employee and Call Activity

The Reports tab displays information needed to monitor employees and their work. Reporting information is organized as Real-Time or Historical. Click either button to see that type of information.

Real-Time Roster

The Roster provides current status information for employees in cc: 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. It does not get retained. Users assigned a role with the RosterAll permission can see all employees. Users with the RosterTeam permission see only their team members.

Filter Roster Information

Filter criteria searches for information to display on the roster. If no criteria are selected, all employees can be retrieved, depending on user permissions. Follow these steps to view the roster:

1. Click Reports tab > Real-Time.
2. In the Roster area, click **Filter**.
3. In the Roster Filter, select the search criteria. Criteria from one or more categories can be selected. Multiple criteria in a category can be selected by pressing the Shift or Control keys when clicking items. Click **Clear** to unselect criteria items.

    ▪ **Labor Unit:** Different labor units can have the same name.
    ▪ **Skill:** These are skills assigned to Labor Units.
    ▪ **Scheduled:** These activity types are assigned to cc: Clarity shift templates. The roster automatically shows employees that are On/Off Shift. Besides on-shift activities, this column will also show if an employee has called off for the day or requested leave/PTO.
    ▪ **Actual:** These values are based on but not always identical to the workmodes/auxmodes from the PBX.
    ▪ **Removed Agents:** Lists agents that have been manually removed from the roster. These agents can be returned to the roster by clicking them here.

4. Click **Filter**. The roster appears.

In addition to the criteria, a roster shows this information:

- **Employee name:** Names appear in red if the employees' scheduled state differs from their actual state. For example, an employee may be scheduled for on call but have logged out for lunch.
- **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.

For each employee on the roster, a user can

- **Action:** Allows viewing of employee's profile ( ), removing the employee from the roster list ( ), or initiating live monitoring ( ) to view current activity on that agent's desktop. Clicking the Profile icon will display information in a new tab within the web browser while keeping the roster displayed.

    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.

Remove an Employee from the Roster

Individual employees can be removed from the roster list by clicking **Remove from List** for that entry.

Follow these steps to add an employee back to the roster:

1. Click **Filter**.
2. Locate the employee in the Removed Agents list.
3. Click **Cancel**.
4. Click **Filter**. The roster refreshes, and the user appears on the list.

Live Monitoring

Note The Live Monitoring feature requires that cc: Discover be installed and configured along with cc: Clarity, and will not function in a standalone installation of cc: Clarity.

cc: Clarity's Live Monitor feature enables supervisors to view an agent's desktop in near-real-time. Live monitoring of agent's desktop is a separate feature licensed as part of CallCopy's cc: Screen product and requires cc: Discover to be installed to function. From the Real-Time roster screen, scroll to the agent to be monitored, and click on the Play button in the Action column.

The agent's Phone ID and Current Application will be displayed. Click **Play** in the Action Column.

The live feed will open in a separate window. Hover the mouse cursor over the tab [▶] in the upper left of the playback area to display the zoom menu.
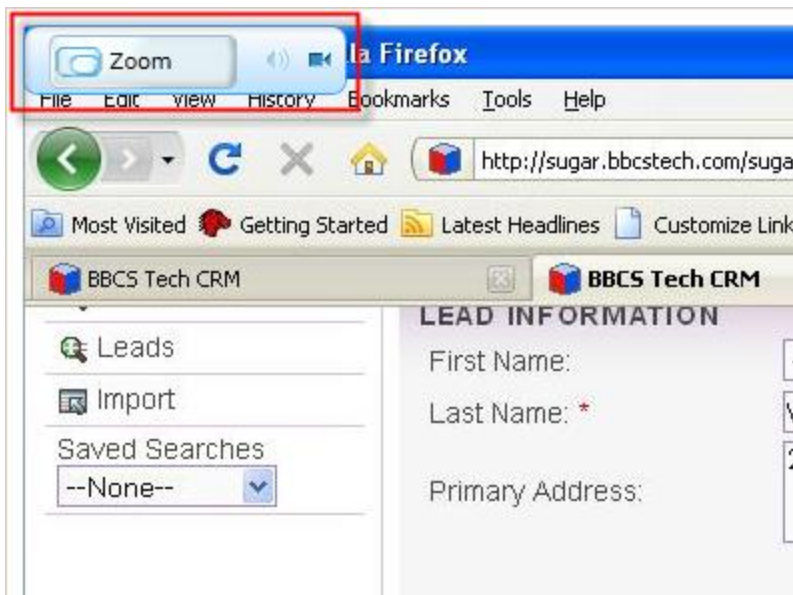

The speaker and camera icons indicate the presence or absence of audio and screen feeds. In the following example, video is available, but no audio.
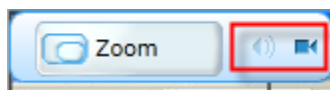
Clicking the **Zoom** button will toggle through three different zoom levels:

- **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.
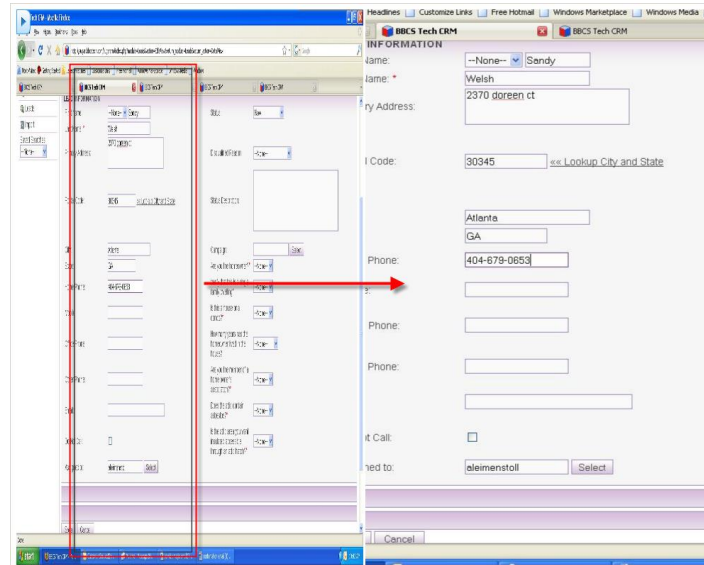
- **Stretch-to-Fit** resizes the full screen image to fit the window. It allows viewing the entire screen but may be difficult to read due to the compression.
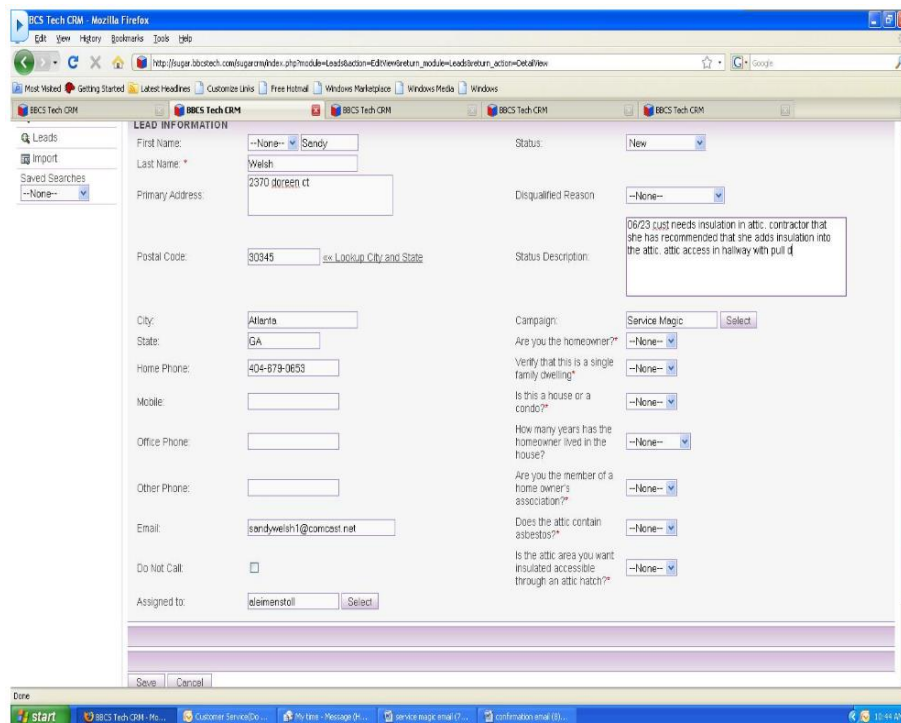
- **Actual Size** displays the live feed at 100% of what the agent sees. Scrollbars appear at the side and bottom of the playback to allow scrolling to different parts of the screen.
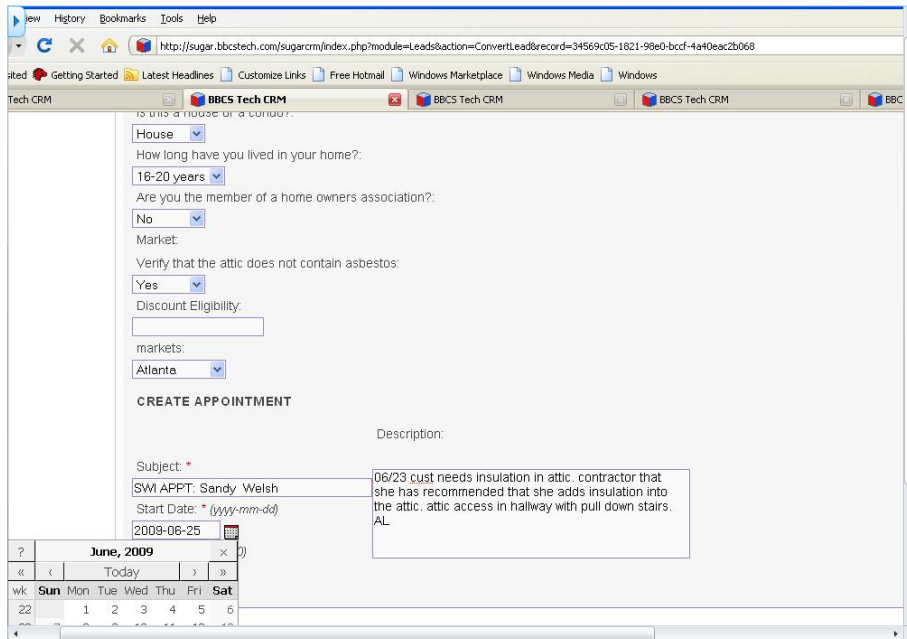
To stop playing the live stream, simply close the playback window. Live monitoring will run continuously until the observer stops playback.

Historical Reports

For information on Historical Reports, see Historical Widgets.

Overview Reports

The Reports tab > Overview section offers a high-level view of employee schedules and events for a specified period of time, grouped daily or weekly. Start by selecting the criteria for the report, then click **Search**. For information on saving search criteria, see Saveable Search Filters.

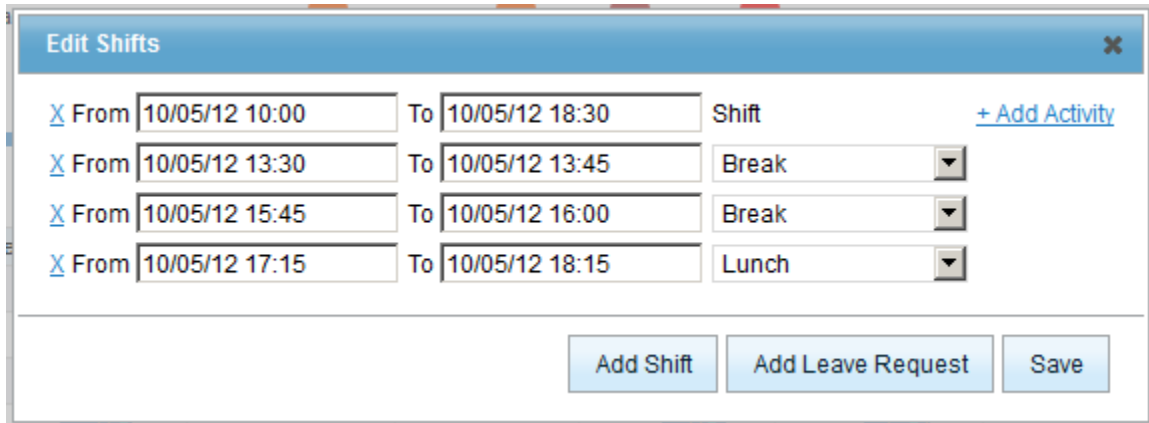The report will appear below once all relevant data has been retrieved. The legend for activity types appears across the top, along with tabs to switch the view between Daily and Weekly. Clicking in the **View Date** field pops out a calendar to allow selection of a specific date. Each report will have a Print icon

 displayed on it. Hovering the mouse cursor over an element in the chart will often display more details.

Add Events

On both the Daily and Weekly report tabs, events can be added or modified on existing shifts. While viewing a person's shift, click on the shift and a menu will appear with the options **Edit Shift**, **Mass Event Add**, or **Mass Shift Add**.

Edit Shift

This allows events to be added, removed, or their time ranges changed. Click $\underline{X}$ to remove it or +Add Activity to make a new entry.

Clicking on a **From** or **To** field presents a calendar pop-up where the date and time can be adjusted. The activity type can be changed from the drop-down menu.

Mass Event Add

This option allows adding a specific event to multiple employees at once. Clicking a name in the left-hand column highlights it, allowing multiple users to be selected before adding. From and To can be specified at the bottom along with the event type. Additional event types can be added under Configuration tab > System Settings > Work Modes > Shift Activity Types.

Mass Shift Add

This option allows adding a specific shift schedule to multiple employees at once. Clicking a name in the left-hand column highlights it, allowing multiple users to be selected before adding.

To build the new shift based on an existing shift template, select **Create shift from template** (new templates can be created under Configuration tab > Scheduling > Shift Templates), select the template on the bottom left, then the start time in the From field on the bottom right.
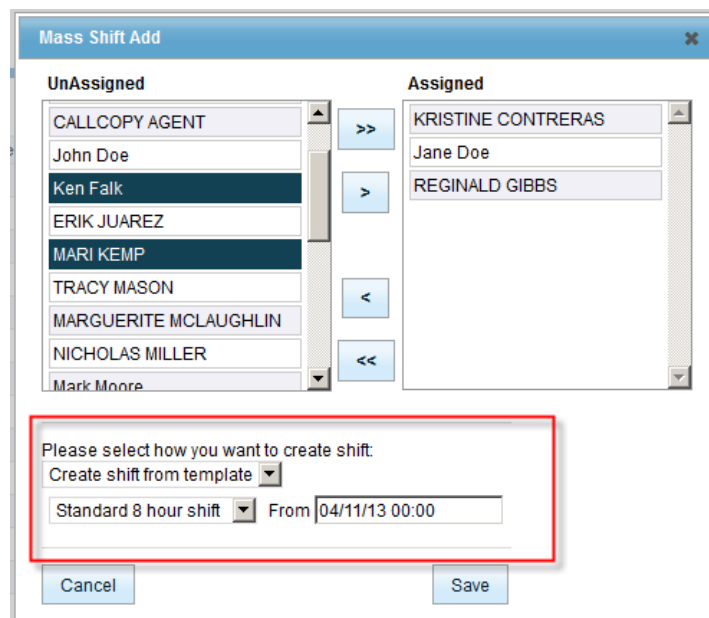
To enter specific shift start and end times as well as custom activities, select **Create shift manually** and enter the necessary information below.

Click **Save** to commit changes.

Daily Reports

Under the Daily tab, daily activity charts will be displayed to show scheduled employees, events, and provide a visual representation of coverage throughout the specified day. Navigation surrounding the date allows moving forward by day (single arrow) or by week (double arrow). Click **Today** to jump to the present date. The hours can be scrolled left to right using the arrows at either end of the hour bar.
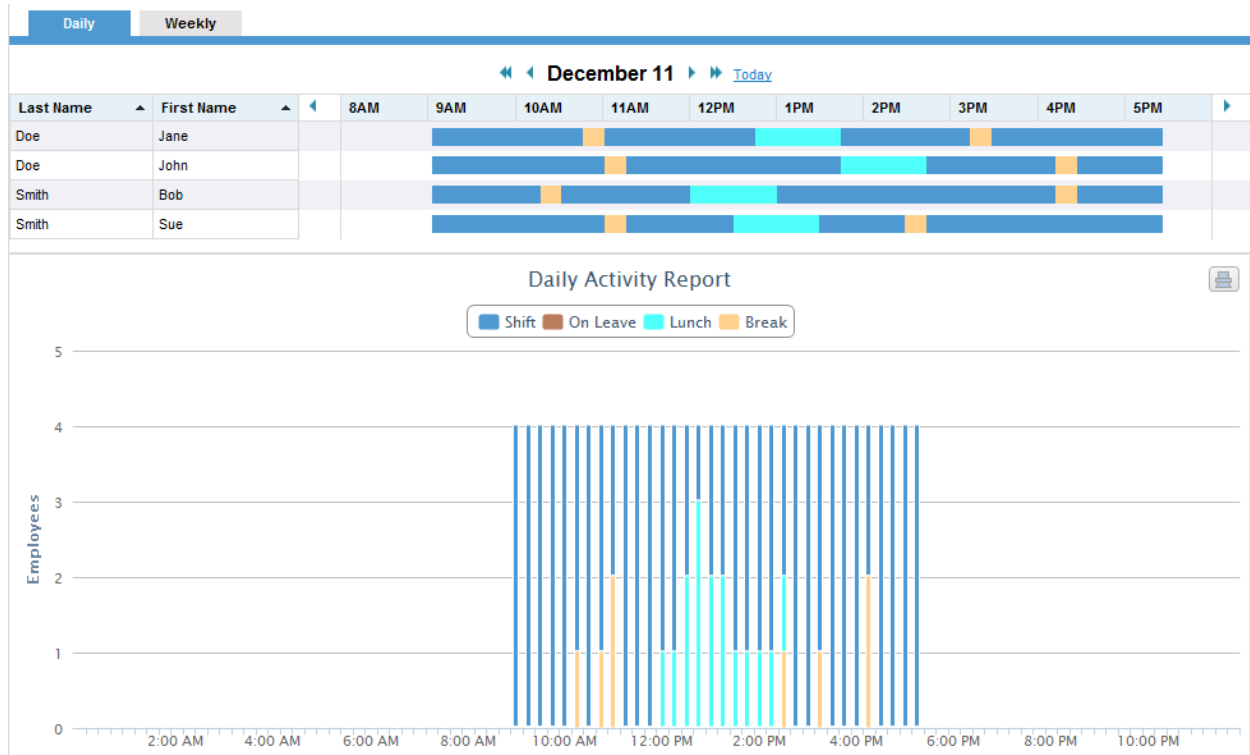
Weekly Reports

Under the Weekly tab, charts for weekly FTE activity as well as total/max staffing are displayed. Date controls work similarly to the Daily Reports – clicking the single arrow moves forward or back one week, clicking the double arrow moves forward or back four weeks. Selecting a date in the View Date field will display results for the week in which that date occurs.
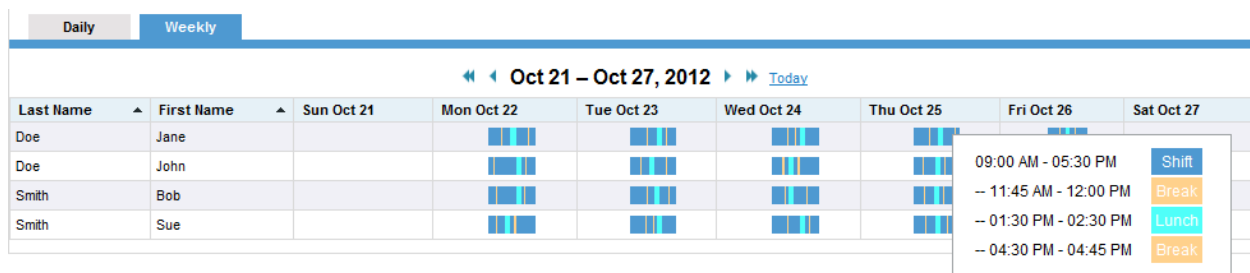
The Weekly FTE Report displays labor distribution for a given day. This helps supervisors to balance resource allocation between standard shift activities and other tasks, like meetings, training, or breaks, while avoiding under- or overstaffing situations.
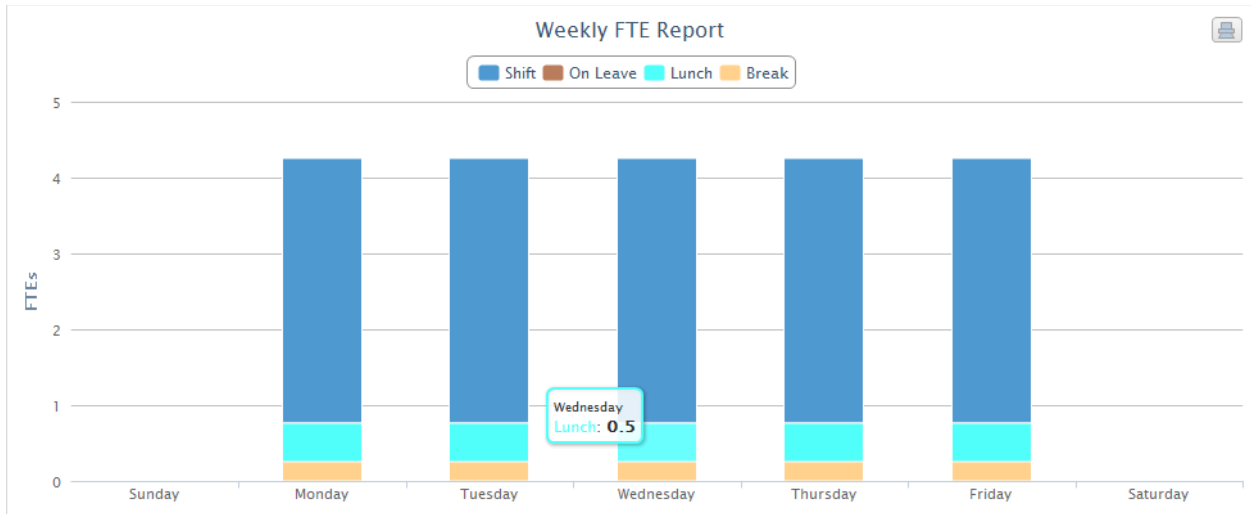
The Weekly Total/Max Staffing Report shows a breakdown of what employee staffing looks like for the given week. In the example below, since one person is not working all week, the Peak line indicates that of the four employees available, three at most will be working.
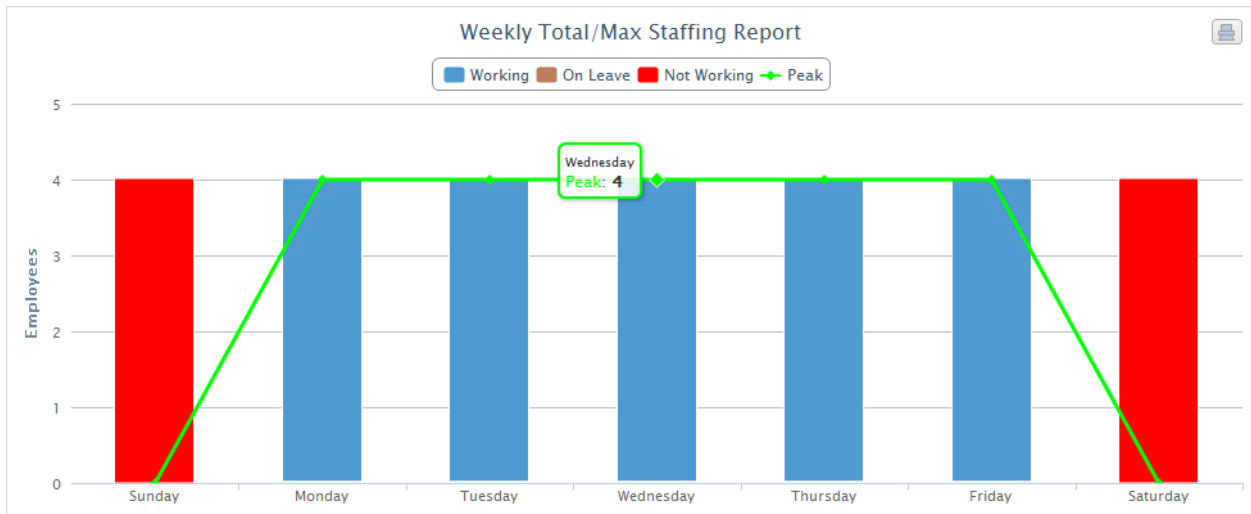
Schedule Adherence

The Reports tab > Adherence section offers information pulled from the agent's phone on how accurately employees are adhering to their scheduled hours and activities (85% and above in black, 84% and below in red). Reports are available for individuals, groups, and locations. Specify your search criteria and click **Search** to begin. For information on saving search criteria, see Saveable Search Filters.

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.

The legend for activity types appears across the top, along with tabs to switch the view between Daily and Weekly. Clicking in the **View Date** field pops out a calendar to allow selection of a specific date. Each report will have a Print icon displayed on it. Hovering the mouse cursor over an element in the chart will display more details.

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%. Lack of data unfortunately counts against adherence as well 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 Reports

Under the Daily tab is a visual representation of coverage throughout the specified day and the % of how accurately actual hours align compared to those originally scheduled. Groupings can be expanded by clicking Plus icon ➕ to show actual activity charts for scheduled employees and events compared to what was scheduled.

Navigation surrounding the date allows moving forward by day (single arrow) or by week (double arrow). Click **Today** to jump to the present date.
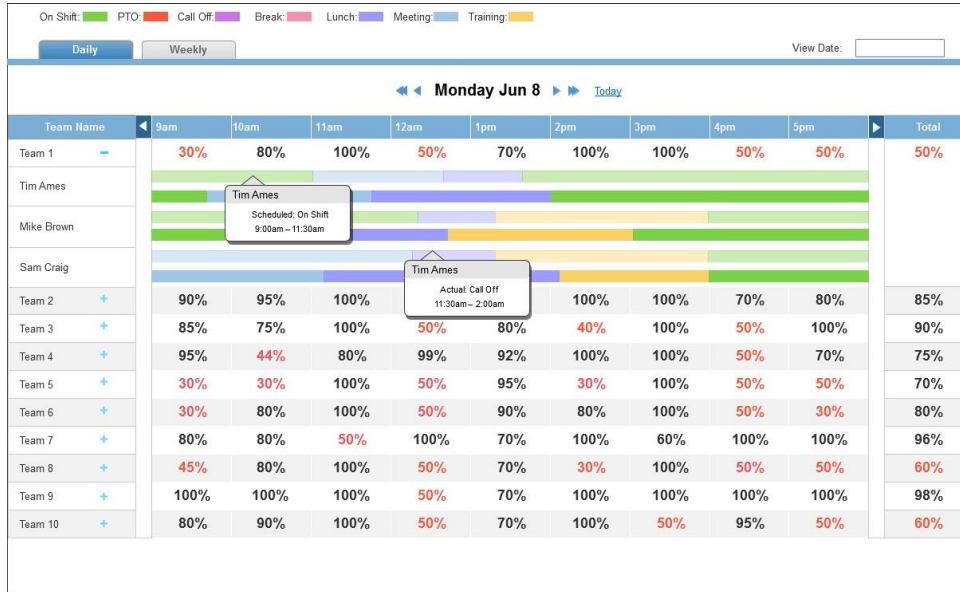
Weekly Reports

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

Navigation surrounding the date allows moving forward by week (single arrow) or by month (double arrow). Click **Today** to jump to the present date.
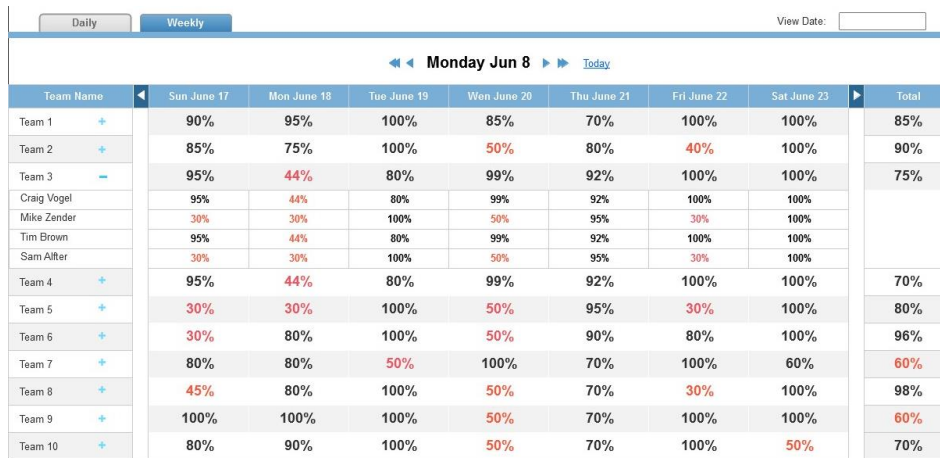
Report Widgets

Report widgets 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. Click a widget's blue-dot arrow to list all the labor unit tabs.

Add or Remove a Report Widget

Widgets can be added, removed, or re-added as needed.

Follow these steps to add a widget:

1. Click the **Add Widget** link.
2. Select a report widget. The widgets available depend on whether Real Time or Historical was selected at the top of the page.
3. Select a Labor Unit to appear as the top tab of the widget. All labor units appear in the widget as separate tabs.
4. Click **Add**. The widget appears on the tab.

To remove a widget, click the X in the top right corner of that widget. A widget can be re-added.

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. The controls in the top right corner can be used to close the widget (✖), or cycle through available tabs (￫ ●).

- **Call Status and Staffed Snapshot**: Status of calls for a period of time. Status can be: Queue or Active. Staffed indicates the number of employees on duty.
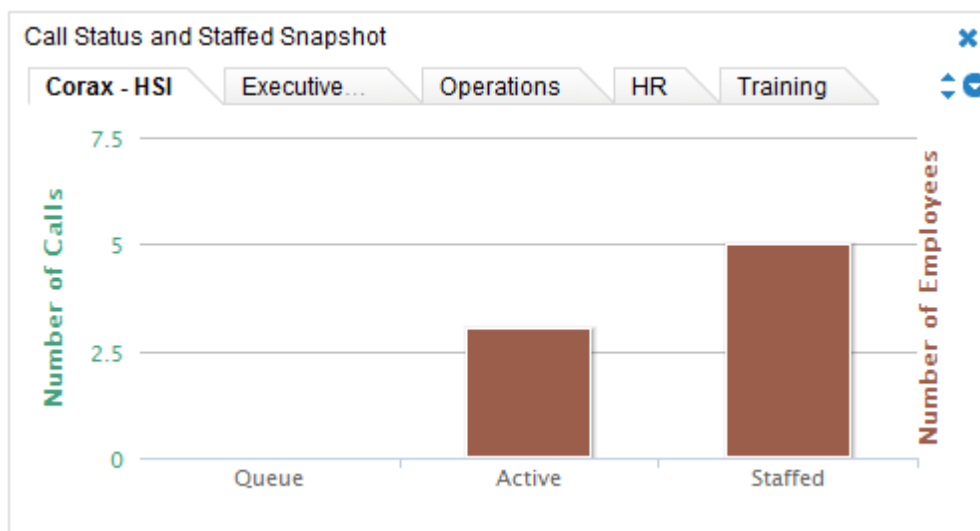
- **Service Level Snapshot:** These numbers are based on the number of calls and the percent of calls that were answered in a specific amount of time. Each skill for a labor unit appears on the tab.
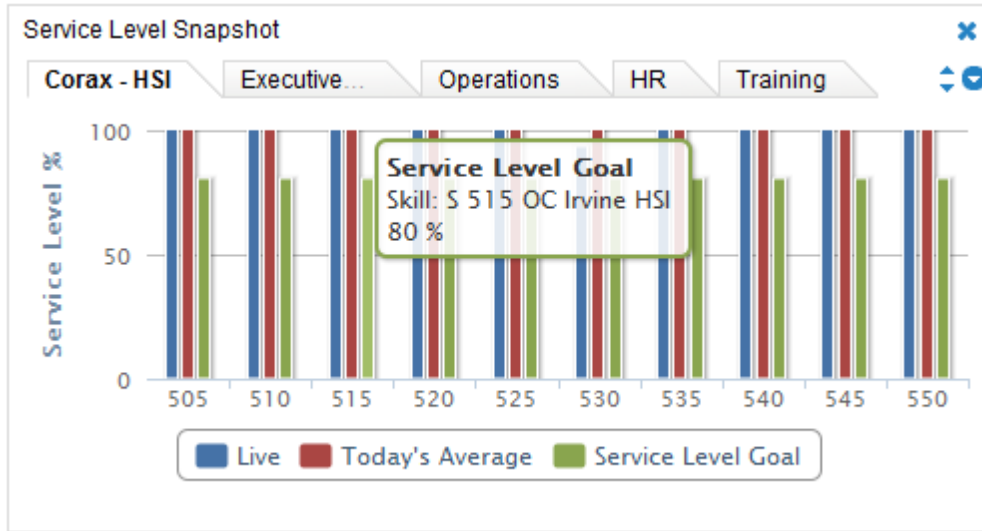
> **Note** The Service Level Snapshot widget may require a page refresh to display the latest information.

- **Live Labor Snapshot:** Displays the actual agent status based on their PBX login status and schedule.
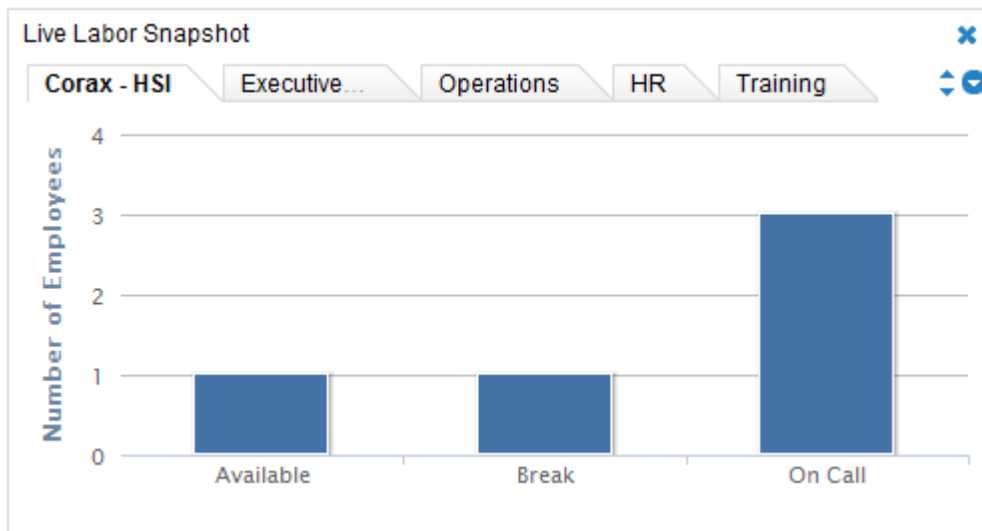
- **Forecasted Calls vs. Actual Calls (15 Minute Intervals):** Compares the number of calls forecast to the actual number of calls currently being handled for the last six hours.
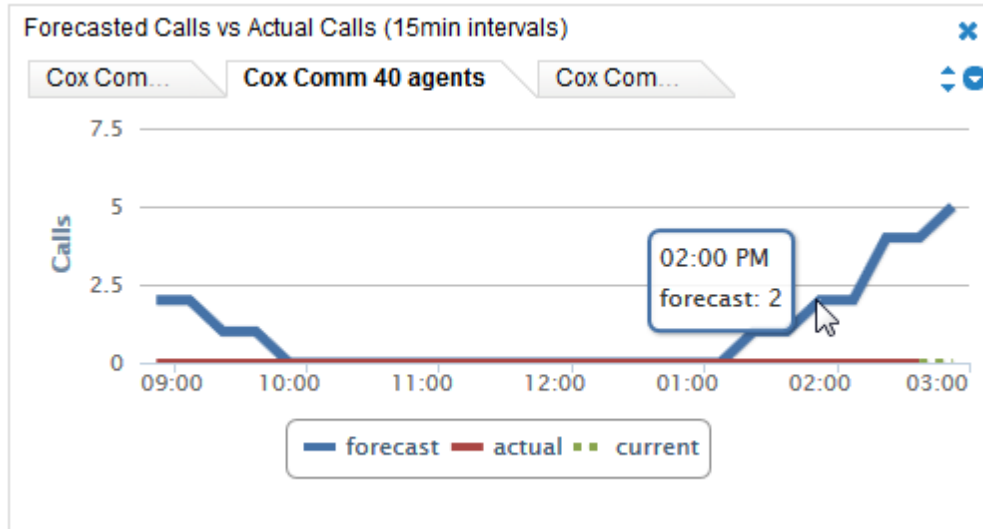
- **Live Project Snapshot:** For calls, the widget displays the number of calls waiting to be answered (i.e., queued) and the number currently being answered (i.e., active). Live service level is calculated using this formula: Number of answered calls / Number of calls with a service level. For staff members, the widget displays schedule information: number of agents available to take calls, in training, and at lunch or break.
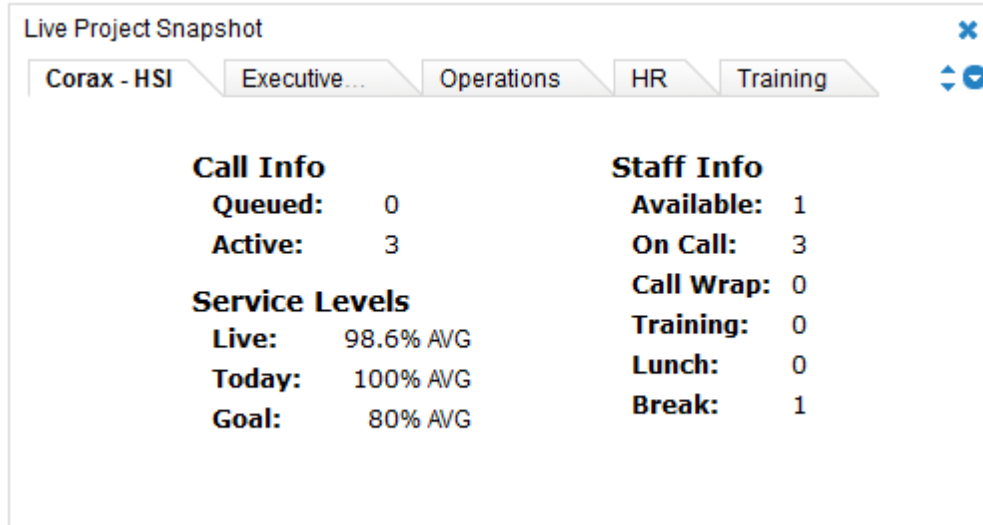
Historical Widgets

Historical reports include these:

- **Forecasted Calls vs. Actual Calls Report:** This widget displays data for the past week. Placing the cursor over a part of either line shows the specific numbers for a 15 minute interval.
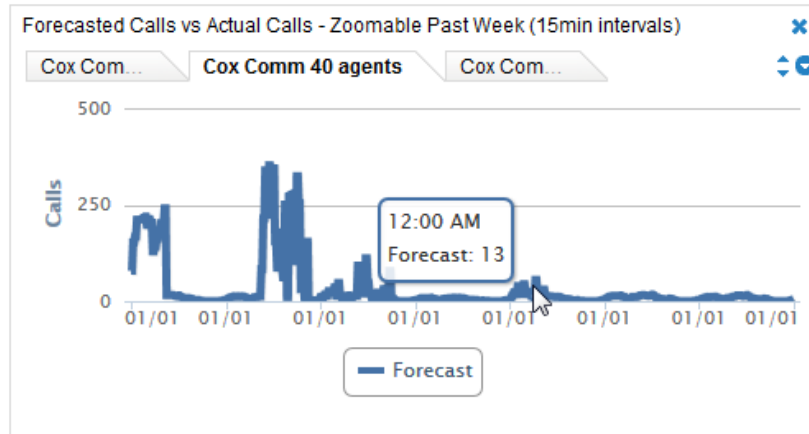
- **Actual Calls vs. Service Level:** For a period of time, this widget displays the number of actual calls and the percentage of calls meeting the predefined service level. Comparing this information to the forecasted calls can help explain service level issues.
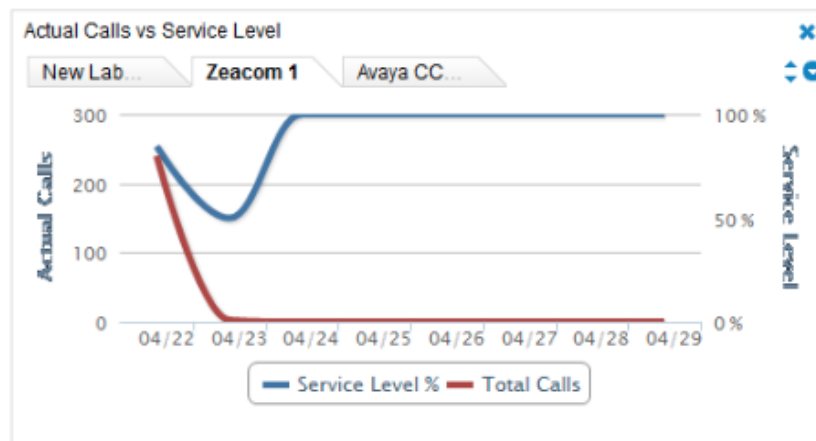
Process Reports

For details, see Approve/Decline Multiple Employee Requests.

Ad Hoc Reports

For more information on generating and working with Ad Hoc Reports, refer to the *cc: Discover Reporting Manual*.

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** cc: 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 such as adding new clients, product changes that make the product easier to use. 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 in the coming schedule period and the call center may support 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. This is especially useful if there are multiple managers creating and sharing 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.
- 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

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

In Clarity, call volume data is related to a device. Uploading a data file overwrites any existing data for that device. 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 it. Then upload the entire data set.

The first row in the CSV file must have the column names listed below. These are the column names and definitions, and are not case-sensitive:

- **split-number:** This number has to match a split/skill/hunt group/queues 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.

 After the CSV file is created, follow these steps to import it:

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**. A generic error message appears if the file does not follow the required data format. After a successful import, the data appears in a table.
5. Click **Save** to complete the import process. The Acquire page opens again.
6. If the imported data includes a split not currently in the database, a new skill is created using the split name and the split number. Click the **Administration** tab, expand the **Miscellaneous** menu in the left navigation bar, and click on **Skills** to confirm the skill was created.*
7. When cc: Clarity creates a skill with a split, it automatically creates a service level entry for that skill. Click the **Administration** tab, expand the **Miscellaneous** menu in the left navigation bar, and click on **Service Levels** to configure the split's service level.*
8. Add the skill to a Labor Unit* by clicking the **Administration** tab, expanding the **Miscellaneous** menu in the left navigation bar, and clicking on **Labor Units.**

*Detailed instructions for these tasks can be found in the *cc: Clarity Administration Manual.*

Once the data has been imported, it can be used to create an historical call volume set.

Create an Historical Call Volume Set

Select Data

Data used in a forecast can come from devices and files, or existing forecasts. Perform one of the actions below to select the data.

Data from Devices

This procedure selects call data that has been imported from PBXs and other devices 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. Click one or more labor units. Only the labor unit(s) 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.

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.

- **Example 1:** 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.)
- **Example 2:** You create the select and modify the historical data. When you review the data trend, you realize additional modifications are needed. At that point, you return to this step, select the data set and make the additional modifications.

Follow these steps to create new 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** and select the acquired set from the drop-down list.
3. Click **Next**. The data is loaded and displayed for modifying.

Modify the Data Set

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

The data must be saved even if no adjustments are made if it will be used for creating a forecast. If the data does not adequately meet the forecasting need, the process can be restarted by going back to the Acquire step.

How the data is displayed varies based what data was imported. This example shows data imported from an ACD for one Labor Unit that contained multiple skills.
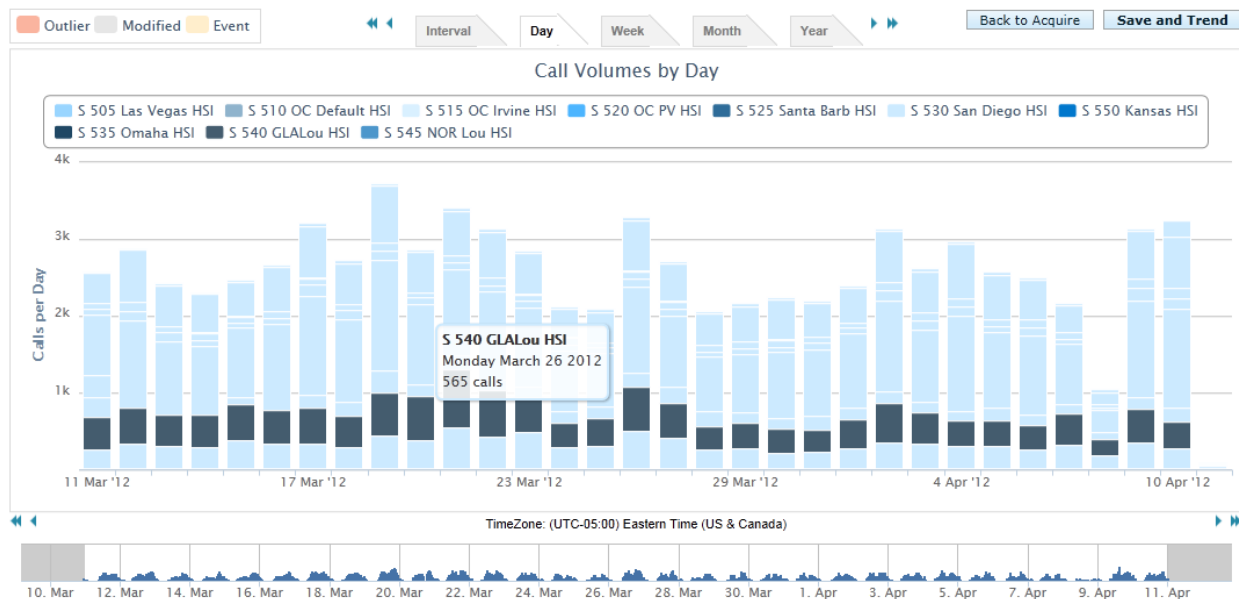
Call data display is organized using these items:

- **Skills key:** A labor unit's skills appear above the bar chart. Each skill has a color code that matches a band on a call volume column. Clicking on a skill removes the 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:** Click a time unit tab to display the data accordingly. The Interval tab displays data in 15 minute periods. The Time Zone reflects the current user's work location.
- **Columns:** Move the computer cursor over a column band to see the number of calls for a skill.
- **Display Time Period Bar:** The white area of this bar determines the specific time period (i.e., day or hours) displayed. To select a time period, click on the bar to the left of a time period label and drag to another area on the bar. For example, to see calls for two days, click **Days** and then drag the cursor over the desired two days.
- **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.

1. Click the **Interval, Day, Week,** or **Month** tab. Data modifications can only be applied to up to 31 days of data in a single operation.
2. Click the data column (i.e., time interval) to be modified, or shift-click to select a range. The selected columns turn white.
3. Right-click the selected columns.
4. Select **Modify Selected**.
5. Adjust the starting and ending dates and times if needed. The ending date/time is defined as the first interval following the range to be modified, and will not itself be altered.
6. Select the desired skills from the **Selected Skills** drop-down menu. The skill names and historical number of calls for the time interval's selected skills appears in the table to the right.
7. Under **Modifiers**, select either:

   - **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 per interval.
   - **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).

8. For **Value**, either **Increase** or **Decrease**. Enter the number of calls or percent by which to adjust the call volume. Click outside the field to see changes update in the table to the right. Increases are indicated in green and decreases in red.

9. A comment is required under **Modification Reason**. This will appear in the pop-up that appears when the mouse cursor is placed over the modified columns, along with the corresponding timestamp and username.

10. Click **Save** to commit the changes. The Call Volumes chart is automatically updated to display the new volumes.

Auto-Correct Selected

cc: Clarity's algorithms may not detect all outliers. If an interval appears to have an unusually high or low call volume, it can be manually modified or auto-corrected. Auto-correcting adjusts the interval to the historical trend calculated by cc: Clarity. To auto-correct an interval, left-click the interval and select Auto-correct selected. Adjustments may be minor and difficult to see.

Undo/Revert Changes

Data modifications, events, and other changes can be undone:

1. Click one or more modified interval columns. This step can be skipped if all changes are being undone.
2. Right-click the graph.
3. To undo changes to the selected columns, click **Revert selected**. To undo all changes, click **Revert all**.

Add Events to Data

Events can be seasonal, recurring, one time, or business events that can affect call volumes. Data can be marked with a pale yellow background to track it as an event, which can help explain why data was modified or why a particular day requires additional or fewer employees scheduled.

1. Click one or more data columns.
2. Right-click the graph to open the context menu.
3. Select **Add event to selected**.
4. Select an event type from the list box or select **New Event Type** to add a new one.
5. Enter a comment.
6. Click **Add**.

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.**

Auto-Correct Outliers

On the Interval and Day tabs, dark pink entries are outliers that deviate significantly from the call volume data range norm. Placing the mouse cursor over the outlier area will display range and reason details about the outlier period, separated by skill.
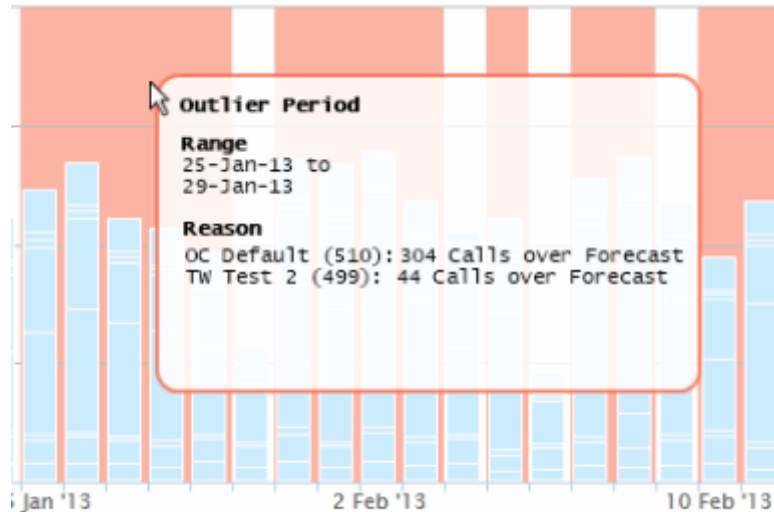
For example, if a skill usually handles 25 calls in a 15-minute interval but on one day handles 150 calls during that interval, cc: Clarity would tag that interval as an outlier. Outliers can occur due to holidays, new product releases, or weather or technology-related service outages.

- If the cause of the outlier will not occur in the coming period, the data entry can be adjusted so that it does not affect the forecast.
- If the cause of the outlier will reoccur, it may be best to leave the data as is. For example, a holiday or special event may reoccur.

To automatically modify these items, left-click the outlier and select **Auto-correct outliers**. Data that is auto-corrected is shaded as modified. To reverse this action, select Revert all.

Save the Forecast Data Set

Save the call data to use it for creating the forecast.

1. Click **Save and Forecast**.
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

This task involves two tasks: reviewing the call volume trend and predicting the call volume.

Review the Call Volume Trend

Reviewing the call volume trend determines if the historical call volume set adequately reflects users' expectations of the call volume for the period being forecasted and scheduled. A forecast can be created from an existing historical call volume set. However, in a rapidly changing call center, volumes can change dramatically in short periods of time. Supervisors have to use their best judgment in determining whether a new set should be created. This task can be skipped.

The call volume trend line shows what the cc: Clarity forecasting model *would have predicted* the call volume to be against the actual historical call volume. The data and formulas used to calculate the trend will be used to calculate the forecasted call volume.

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.

1. On the Forecast tab, click **Trend**.
2. Select a data set from the drop-down list. Click **Next**. A graph with the existing data and a call trend appears.
3. Review the trend line in order to determine if it adequately reflects the historical performance. The more accurately the trend reflects the historical performance, the more accurately it will predict the future volume. The data may need additional modifications if there are highs/lows or unusual trend changes.

   - If the data needs changed, click **Acquire** to create a different historical data set.
   - If another existing data set may more accurately reflect expectations of the forecasted period, click **Back to Trend**.
   - When the trend accurately reflects the historical performance, click **Continue to Predict** to move to the Predict task.

Predict Call Volume

cc: Clarity's forecast model estimates the number of calls for a time interval based on the trend values. For example, if a four week schedule is being created, the model will estimate the number of calls for 10:45 AM for each Tuesday based on the average number of calls historically received for that time period and several other factors. Any data set created earlier can be used to predict call volumes.

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.

1. On the Forecast tab, click **Predict**.
2. Select an historical data set from the drop-down list. The labor units in the set appear below the list.
3. In the **From** field, select the first date in the forecast. This date is usually the first day of the new schedule. (The default setting is a four week period.)
4. In the **To** field, select a date on which the call volume forecast will end.
5. Click **Next**. A graph with the predicted call volumes appears.
6. The data columns can be adjusted by right-clicking the selected column and selecting **Modify Selected**. Changes might be necessary in order to make adjustments for factors that the historical data did not include. From the **Predict** screen, modifications can only be made at the Interval level.

You can also add events from the **Predict** screen. 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.**

7. If the call volume forecast will be used for scheduling, click **Save and Schedule**.
8. Enter a name for the forecast and click **Save**. Due to analytic processing, the system may take several minutes to complete the forecast. The Schedule > Load page will open when processing is complete.

Schedule Employees

Use the Schedule tab to schedule individuals and/or labor units. There are three steps in the cc: Clarity scheduling process:

- **Load.** In this step you create a "schedule entry", a named combination of forecast data (if desired) and labor unit(s).
- **Create.** Here you 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.** In this final step, you 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 by using the Mass Event Add or Mass Shift Add features described in Add Events in the Overview Reports section.

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

- **Schedule types**. cc: Clarity will not allow you to save a schedule that violates labor rules configured on the schedule type, and associated shift templates, assigned to a given employee. For more information on this feature, refer to the Shift and Schedule Settings section of the *cc: Clarity Administration Manual*.
- **Pre-existing schedules**. cc: 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, cc: 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. For more information on setting up Labor Units, see the *cc: Clarity Administration Manual*.

  Note Schedules can be created for days in the past.

Manually Create a Schedule without a Forecast

Schedules can be created manually for employees whose work does not depend on call volume forecasts such as computer technicians and human resource specialists.

  Note If a schedule entry already exists and will be re-used, click Schedule > Create and start at Step 5. A schedule entry can be reused if mistakes are made while creating the schedule. Typically, however, they 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.

Schedule Employees

1. On the Schedule tab, click **Load**.
2. Enter a name for the schedule entry. Entries can be named for the Labor Units, teams, forecasts, or anything. cc: Clarity will append the current date to this name. You will select it later in this procedure.
3. Click **No Forecast**.
4. Select one or more labor units. Click **Next** to advance to the Create page.
5. Click **Create a blank schedule** and select the schedule entry previously created. The schedule appears with the **View Schedule** tab highlighted, listing the members of the labor unit and the dates for the current week.

   > **Note** In addition to the View Schedule tab, you will also see the <u>Overtime For Period</u> tab, which is explained later in this section.

6. Use the left and right arrows buttons (<< < *Date Range* > >>) to select the week for which a schedule will be created.
7. Locate the employee to be scheduled. Double-click the employee's name. A scheduling grid will open for the individual employee.
8. Use the arrow buttons and scroll bar to navigate to the desired time.
9. Hours and activities can be entered by using a shift template, drawing hours, or creating an ad hoc template.

   Shift Template
   Templates available for the labor units appear on the left side of the calendar. To use one, drag it to the desired starting date/time on the calendar. Template activities can be changed as needed.

   Drawn Hours
   Select and de-select hours by:

   - Clicking individual cells in the graph to create a time block.
   - Clicking and dragging the cursor over multiple cells in a single day (i.e., column).
   - Clicking the = at the bottom of a time block and dragging down.
   - Right-click on a time block to delete it.

Ad Hoc Template
Draw the hours as described above. Right-click on the block and select **Copy to Templates**. An entry for the shift appears under Shift Templates on the left side of the page. To use this template, drag it to the calendar.

10. If a shift template requires certain activities, click in the narrow white strip to the right of the blue time block to categorize sub-blocks of time. Double-click a sub-block to change the category. Categories include: Lunch, Break, Callback, Meeting, Training, Default, On Shift, and Off Shift.

11. Scroll to the top of the page and check if any schedule/shift labor rules have been broken. Check each time block to see which one(s) break the rule(s) and correct as needed. Only one rule may be listed even if multiple rules are broken.

   Notes

   - cc: Clarity will not let you publish a schedule that violates the schedule/shift labor rules.
   - 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 that crosses a change **from** DST to Standard Time would display as 01:00-09:00, but still be 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.

12. Click **Return** to go back to the list of employees being scheduled. The added hours appear in the employee grid. If a day has non-consecutive scheduled hours (e.g., 10 AM – Noon and then 3 PM – 5 PM), an ellipsis (…) appears in the scheduled period. Repeat Steps 7-12 for other employees as needed.

13. From the list of labor unit employees, pass the cursor over cells in the schedule to review details as necessary.

14. 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:

   - **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, it can be easily repopulated 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).
   - **Clear day:** Removes scheduled hours for the day.
   - **Clear week:** Removes scheduled hours for the week.
   - **Mass Shift Add:** This option allows adding a specific shift schedule to multiple employees at once. For details on using this feature, see Add Events.

15. Click **Save and Publish**.
16. Enter a name for the schedule. Schedules can be named for teams, labor units, or other identifiers. Including the date range of the schedule can also be helpful.
17. Click **Save**. The Publish page opens. If you do not wish to publish the schedule at this time, you can simply click on another tab to leave the Publish page. However, keep in mind that you will have no way to return to this schedule for editing until after it is published. It is therefore important to be sure that your schedule is as close to being finalized as possible before reaching this point.

Automatically Generate a Schedule Using a Forecast

To help supervisors make better use of their time, cc: Clarity can generate schedules using a call volume forecast and the schedule type and shift rules associated with each employee in a Labor Unit.

> **Note** If a schedule entry already exists and will be re-used, click Schedule > Create and start at Step 6.

1. On the Schedule tab, click **Load**.
2. Enter a name for the schedule entry. Entries can be named for the Labor Units, forecasts, or both. cc: Clarity will append the current date to this name. You will select it later in this procedure.
3. Select a call volume forecast data file from the list.
4. Select the Labor Units to schedule. The Labor Unit selected does not have to be the same Labor Unit used to create the forecast. The Labor Units available in the list either have the same skills as the Labor Unit used to create the forecast data set or have no skills. Labor Units without any skills can be used as secondary agents for peak hours. Click **Next**.
5. Review the forecasted call volumes to confirm that the forecasted volume meets expectations. If the volume is not acceptable, this procedure can be stopped and a different forecast volume can be generated or selected. For example, factors that affect call volumes may have changed in the time between when the forecast volume was created and the schedule is being created.

   If the forecast is acceptable, click **Continue to Create** to create the schedule.
   If the forecast is not acceptable, click **Back to Load**.

6. Click **Generate a schedule**.
7. Select a schedule entry from the drop-down list.
8. Enter a schedule start date and end date. (This does not have to be the same date range as the call volume forecast.)
9. Click **Next**.
10. cc: Clarity checks the shift schedules for current employees.

   - Employees who are already scheduled are identified and appear in a message box. If adding additional hours to their schedule will create a problem, click **Cancel** to stop this procedure. Otherwise, click **OK** to have hours added to those employees' schedules.
   - If users belong to multiple Labor Units, cc: Clarity identifies them. cc: 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.

11. The schedule appears with the **View Schedule** tab highlighted, listing the members of the labor unit and the dates. Review the proposed schedule hours. Hours appear in 24-hour format. For shifts that start on one day and end the next, the first day's shift has an ellipsis (…) and the next day's shift has as ellipsis (…). This draft of the schedule is automatically saved at the time it is generated.

    Individual shifts can be viewed or edited by double-clicking an employee's name. For details, see Manually Create a Schedule without a Forecast. To save manual adjustments as they are made, click **Save**.

12. Once any adjustments are complete, click **Save and Publish**.
13. Enter a name for the schedule and click **OK**. The schedule is saved and the Publish page opens. If you do not wish to publish the schedule at this time, you can simply click on another tab to leave the Publish page. However, keep in mind that you will have no way to return to this schedule for editing until after it is published. It is therefore important to be sure that your schedule is as close to being finalized as possible before reaching this point

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.
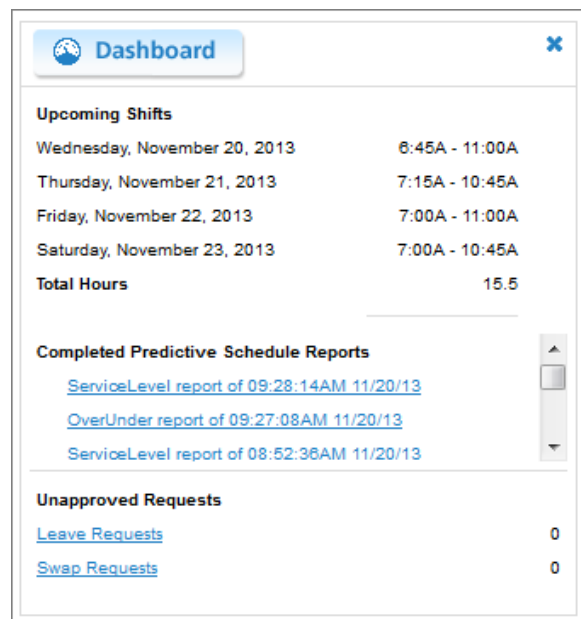
Over/Under Staffing

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.

> **Note** The algorithm used in **Over/Under** and **Service Level** (see next section) 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).

To generate over/under information for a schedule:

1. Click on the **Over/Under Staffing** tab. A pop-up box will appear, informing you that the report may take several minutes to run. Click **Yes** to continue or **No** to cancel. If you check the Email box, the system will send you an email once the information is ready. If you check the SMS box, the system will send you a text message. 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 cc: Clarity employee record. SMS must be enabled for your account to use text notifications.

2. After some time, another pop-up box may appear, informing you that the report is still processing and providing an opportunity to cancel if desired. Click **Cancel** to stop the report, or **Wait** to continue generating over/under information. 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, the pop-up will appear and again give you the opportunity to cancel. You will not be able to save and publish the schedule until over/under processing is complete.

To access a completed over/under report, click on the **Home** tab and then click on the report link under **Completed Predictive Schedule Reports** in the **Dashboard** widget.

> **Note:** You may need to add the **Dashboard** 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 the 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 [123].

- 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 by following the steps at the start of this section. 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.
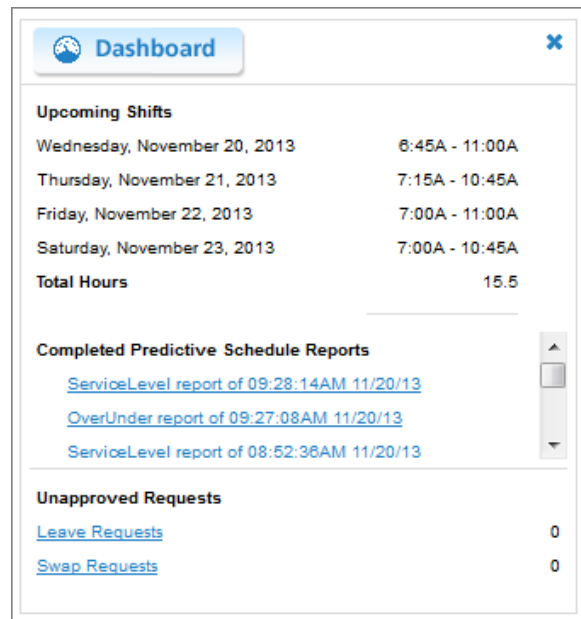
Service Level

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. For more information on configuring service levels, see the "Service Levels" section in the *cc: Clarity Administration Manual*.

To generate service level information for a schedule:

1. Click on the **Service Level** tab. A pop-up box will appear, informing you that the report may take several minutes to run. Click **Yes** to continue or **No** to cancel. If you check the Email box, the system will send you an email once the information is ready. If you check the SMS box, the system will send you a text message. 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 cc: Clarity employee record. SMS must be enabled for your account to use text notifications.

2. After some time, another pop-up box may appear, informing you that the report is still processing and providing an opportunity to cancel if desired. Click **Cancel** to stop the report, or **Wait** to continue generating service level information.

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, the pop-up box will appear and again give you the opportunity to cancel. You will not be able to save and publish the schedule until service level processing is complete.

To access a completed service level report, click on the **Home** tab and then click on the report link under **Completed Predictive Schedule Reports** in the **Dashboard** widget.

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

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

- 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 information 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 by following the steps at the start of this section. 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. Follow these steps to publish a schedule:

1. Click **Publish**.
2. Select a schedule from the dropdown list.
3. Optional – Select a notification option. cc: Clarity will generate a message. The messages cannot be configured.

    - **Email:** Users must have an email address specified on their cc: Clarity account. The email message will have the title: "You have been scheduled in cc: Clarity." The message body will list the scheduled shift times.
    - **Twitter:** A Twitter site must be setup and its information configured in cc: Clarity. The tweet will be "Schedule published!"
    - **Facebook:** A Facebook site must be setup, and its information configured in cc: 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 cc: Clarity accounts, and the "Enable SMS" box must be checked. The SMS message will be "You have been scheduled in cc: Clarity."

4. Click **Publish**.

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

Undo Publish Schedule

This allows removal of a published schedule. When a schedule is removed, all shifts that were created by the schedule will be removed. If a shift has been modified after the schedule was published, that shift will not be deleted when the schedule is removed. Click the **Undo Publish Schedule** button to remove. 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

1. Click **Publish**.
2. Select the schedule from the drop down list and clear the publication options.
3. Click **Export**.
4. Using the web browser's options, save the file to the local computer.

PTO Blackout Dates

It is possible to specify a time frame during which employees will be limited on the number of PTO requests they can submit. This could be a single date or a range of dates. To configure a PTO Blackout:

1. Under the **Configuration** tab, click Miscellaneous > PTO Blackout Dates.
2. Add a Description, Start Date for the range, End Date, and the Maximum Allowed number of requests that may be submitted during that period of time.
3. Click **Add**. The range will now appear above the entry fields.

Once added, the list of date ranges can be sorted by clicking any column header. The arrows will display according to ascending or descending order. Click **Delete** to remove an entry from the list.

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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.

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