# GENESYS

# Workforce Management Web for Supervisors (Classic) Help

Adherence Views

7/14/2025

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- Supervisor

View and customize detailed agent adherence data in a table or graphical format.

**Related documentation:**
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# Adherence Details view

To display the **Adherence Details** view:

1. Do one of the following:

   - In the Modules tree, select **Adherence** > **Details** module.

   - If you are in the Adherence Graphical view, use the **Adherence** drop-down list (on the right side of the toolbar) to select the **Details** module.

2. In the Objects tree, select the teams or agents you want and click **Get data**.
   **If you previously selected teams or agents in the Adherence Graphical view, these selections remain. You can modify them if you want to.**
   **You can expand business units to display their sites and sites to display their teams and agents. You can select an entire site or several sites within a single business unit, or any combination of agents and teams within a business unit. For independent sites, you can select the entire site or any number of teams and agents within the site.**

   > **Tip**
   > Selecting a site or its teams/agents in a different business unit clears any previous selection within the first business unit. Or (for independent sites) selecting a different site or its teams/agents clears your selections under the first site.

The **Details** table is populated with adherence data for the selected agents and/or teams.

In the Adherence Details view, you can view the multi-channel adherence details by clicking the arrow in the first column of a specific row to expand it. For more information, see Adherence per-channel. To export this data to a report or in CSV-friendly format, see the Agent States Report.

## Reading details in the table

The table columns list the following information for each agent:

- Last and First name

- Team

- Scheduled state group

- Current state

- Duration of non-adherence

- Channels  (optional)

- Adherence State (optional)

- Shift start time (optional)

- Site (optional)

> **Tip**
>
> Open the Detail Options dialog to select the optional columns if you want to see them. If you include the **Shift Start** column but an agent has no shift, the cell for the agent in this column is empty.

Colors indicate each agent's degree of non-adherence: Adherent, Non-adherent, or Severely non-adherent (that is, non-adherent for more minutes than a defined threshold allows). The Legend below the table identifies each color's meaning.

## Customizing the table

You can use the following options to customize the table's display:

- By default, agents are ranked according to non-adherence. Therefore, the agent who is out of adherence the longest appears at the top of the list. You can sort the display according to different columns (except for **Scheduled State Group**) by clicking the column headers.

- To filter information in the display by state or by reason (aux) code, click the **Filter** button on the **Actions** toolbar or select **Settings** from the **Actions** menu.

- To change which columns appear, click the **Options** button on the **Actions** toolbar or select **Options** from the **Actions** menu.

- Agent names do not appear if the following option in the WFM Web Application object is set to $true$: **Options** tab > **Options** section > **HideNames**.

- The display is updated at a user-defined interval, as described in the Adherence overview.

## Filtering adherence

Use the **Adherence Filter** dialog box to filter the items displayed in the data pane.

1. In the Adherence Details view or in the Adherence Graphical view, click the **Filter** button on the **Actions** toolbar or select **Filter** from the **Actions** menu. The **Adherence Filter** dialog box appears. It

contains four tabs that present four different ways to filter the data that appears in the **Data** pane:

- **Scheduled State Groups**—This tab displays a hierarchical list of items corresponding to the current selection(s) on the **Object** pane:

  - Business Unit (BU)—Sites—Schedule State Groups if the object pane selection is a BU or multiple sites.

  - Site—Schedule State Groups if the selection is only one site.

- **Genesys States**—This tab displays all possible Genesys states.

- **Adherence Statuses**—This tab displays all four possible statuses: Adherent, Non-adherent, Severely non-adherent, and No information.

- **Activities**—This tab displays a hierarchical list of items corresponding to the current selection(s) in the object pane:

  - BU–Sites–Activities if the object pane selection is a BU or multiple sites.

  - Site–Activities if the object pane selection is only one site.

2. Clear an item's check box ( ) to filter that item from the displayed data.

3. To filter on user-defined Reason codes, select the **Filter using the following reason** check box; then type the appropriate code in the text box to its right.

> ## Important
>
> The specified reason code must not contain any spaces inside, or at the end of, the key value.

4. Click **OK**.

The **Adherence Filter** dialog box closes and your filter selections are applied immediately. They will continue to apply until you change them or log off.

> ## Tip
>
> - In the toolbar, the filter icon is blue ( ) if all defaults are in effect and red ( ) if any are not.
>
> - The Adherence Details view updates automatically if you change your selection(s) on the Object pane. Also, if you select agents or teams in another site, then their selection under the **Scheduled States** tab returns to the default, All.
>
> - Items that you have configured to appear are displayed in the **Scheduled State Groups** and **Genesys State** tabs. Schedule State Groups are configured in WFM, see Scheduled State Groups. Genesys states are configured in Genesys Administrators.
>
> - You can also use the **Filter** dialog in the Adherence Graphical view. Changes that you make in one view apply to both views.

## Setting the details options

Use the **Options** dialog box to select which columns should appear in the Adherence Details view:

1. In the Adherence Details view, click the **Options** button on the **Actions** toolbar or select **Options** from the **Actions** menu.
   The **Options** dialog box appears. When you select a check box, the corresponding column appears in the **Adherence** table:

   - **Shift Start Time** check box:

     - If an agent is already working during the period shown in the Adherence Details view, this column shows the start time of the current shift. If the shift start time is the previous day, the time has a minus sign (-) in front of it.

     - If an agent is not currently on a shift, this column shows the next scheduled shift start time. If the shift starts on the following day, the time has a plus sign (+) in front of it.

   - **Site** check box. This column displays each agent's site.

   - **Adherence State** check box. This column displays each agent's current state of adherence.

   - **Channels** check box. This column displays agent adherence for each configured media channel.

2. Click **Apply**.
   The Adherence Details view reappears. It is automatically updated to display the columns you selected.

> ### Tip
> When unchecked, the **Channels** column is not hidden if any agent adherence details are expanded. If none are expanded and the check box is unchecked, the column is hidden. See examples in the figures below (click to enlarge them).



**Figure:** No Multi-Channel Adherence Details: Not expanded—Channel column hidden



**Figure:** Multi-Channel Adherence Details: Expanded—Channel column displayed

## Adherence Graphical view

To display the **Adherence Graphical** view:

1. Do one of the following:

   - In the Modules tree, select **Adherence** > **Graphical module**.

   - If you are in the Adherence Details view, use the **Adherence** drop-down list (on the right side of the toolbar) to select the Graphical module.

2.  In the Objects tree, select the teams or agents that you want, and then click **Get data**.
    If you previously selected teams or agents in the Adherence Details view, these selections remain. You can modify them if you want to.
    Expand business units to display their sites and expand sites to display their teams and agents. You can select a single site or multiple sites within a single business unit, or any combination of agents and teams within the business unit. For independent sites, you can select the entire site or any number of teams and agents within the site.

> ### Tip
> Selecting a site or its teams/agents in a different business unit clears any previous selection within the first business unit. Or (for independent sites) selecting a different site or its teams/agents clears your selections under the first site.

The pie chart displays adherence data for the selected agents and/or teams.

3.  To filter information in the display by state or by reason (aux) code, click the **Filter** button on the **Actions** toolbar  or select **Settings** from the **Actions** menu.

## Reading the data in the chart

The pie chart summarizes the share of agents in each of the following adherence states:

- Adherence.

- Non-adherence.

- Severe non-adherence. (Severe non-adherence means that the agent has been non-adherent for more minutes than a defined threshold allows. The threshold is set at the site level.)

Each category is represented by a colored wedge in the pie chart. The Legend (below the chart) identifies each color's meaning. If no data is available, the whole chart is gray.

Beside each wedge, the first number shows the percentage of agents in the category. The second number shows the actual number of agents in the category.