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Workforce Management Web for Supervisors (Classic) Help

Adherence Reports

Contents

- 1 Security restrictions
 - 1.1 Security restrictions
 - 1.2 Date restrictions
- 2 Historical multi-channel adherence data in reports
- 3 Agent Adherence Report
 - 3.1 Agent Adherence Sub Report
- 4 Adherence Totals Report
 - 4.1 Site Adherence Totals Report
 - 4.2 Team Adherence Totals Report
 - 4.3 Agent Adherence Totals Report
- 5 Agent States Report
 - 5.1 Agent States Sub Report

Choose from three different reports to view adherence details and statistics at the business unit, site, team, or agent level, or on a per-channel basis.

Related documentation:

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Adherence reports display adherence data at the business unit, site, team, or agent level. If agents in your site perform work on multiple media channels, you can run adherence reports that also contain adherence statistics per channel.

The Adherence reports are:

- Agent Adherence Report
- Adherence Totals Report
- Agent States Report

For a complete list of all WFM reports, see the Reports List.

Security restrictions

There are some restrictions when working with reports.

Security restrictions

You can view and print reports only for those sites for which you have security access. To create a report, click that report's link (above) and follow the steps.

Date restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.
- If you select intra-day granularity, the **End Date** selector is disabled.

Historical multi-channel adherence data in reports

The Agent Adherence and Agent States reports contain historical multi-channel data. These WFM reports include aggregated agent state and channel state data in the same level. If there is no scheduled state to be mapped to a schedule state group that does not have a specified channel during a particular time interval, the aggregated agent state is omitted from the returned data for that interval and WFM returns only channel data. As part of the record corresponding to the aggregated status, WFM returns only schedule states that map to schedule state groups that do not have a specified channel. WFM omits the channel data when the channel does not have a real-time state and there are no schedule states to be mapped to the schedule state group for that channel.

WFM returns data with one minute granularity, which is the same granularity real-time data is stored in the database. One record represents data for a single channel or agent-aggregated level data. The record also contains the start/end date and time, and a list of schedule states. In this way, it is possible to have multiple events for the same time period. However, these events are not double counted for report totals.

For more information about the how historical multi-channel adherence data is displayed, see the section Channel Sub Reports in Agent Adherence Sub Report and Agent States Sub Report.

Agent Adherence Report

To configure the report:

1. On the **Reports** tab, select **Adherence Reports** from the Views menu.
2. From the list in the Objects pane, select **Agent Adherence Report**.
The Reports Wizard's first screen, Header, appears.
3. Optional: To generate a header on the report, select **Show Header** and type your header text into the text box.
4. Optional: To export the report to a file in the comma-separated values format:
 1. Select the check box **Create report with .csv friendly format**.
 2. After the report is created, select **Actions > Save As**.
 3. Select **Comma Separated** as the report format. (See Tip below.)
5. Click **Next**.
6. On the **Date Range** screen, select a start and end date for the report.
Your granularity selection may restrict your date selections.
7. Optionally, you can select the **Display Every Unique Status** check box. Select this option if you want to see every nonadherent status that the agent was in during periods of nonadherence. If you leave this check box cleared, the report shows only the first of the consecutive nonadherent statuses that occurred during each schedule state.
8. Optionally, you can also check the **Exclude Days Without Shifts** check box.
In this case, scheduled days without shifts are not included in the report.
9. Click **Next**.
10. On the **Data** screen, select the agent(s) to include in the report.
You can expand business units to display their sites, teams, and agents.
11. Click **Finish**.

The report appears in the Report Viewer.

Tip

Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.

Here's what's in the report:

Site [header]	The site's name and time zone.
Team [header]	The name of the selected agent's team.
Agent [header]	The name of the agent whose information is displayed in the report.
Date Period	The time range covered by the report. Adherence data is shown for each day separately.
Scheduled State	Lists the agent's noncompliant scheduled states.
Agent State	The noncompliant states registered for the agent throughout the day.
Start Time/End Time	The start and end times for the noncompliant states.
% Adherence Per Day	<p>The percent of the day during which the agent was adherent to his or her scheduled state. This is calculated using the formula $100 - ((NC+UNC)*100/(ST+UNC))$ where:</p> <ul style="list-style-type: none">• NC—Noncompliant time• UNC—Noncompliant time outside of scheduled time• ST—Scheduled time
% Adherence for Agent	The percent of the report's total time range during which the agent was adherent to his or her scheduled state.

Agent Adherence Sub Report

The Agent Adherence report has a Channels sub report that provides separate data for each media channel and aggregated real-time state information for those schedule state groups with no specified channel. The data in each record of the report is aggregated and contains the following columns:

- **Channel**—The name of the channel.
- **Agent State**—Real-time state of the agent on that specific channel.

The order and format of these columns is as shown in the example below.

Agent Adherence Report

Site [REDACTED]
Time zone ECT
Team [REDACTED]
Agent **Lund , Krist**
Date Period: 4/1/10 - 4/30/10

4/12/10

Start Time	End Time	Schedule State	Agent State
8:56 AM	9:00 AM	No Activity	AfterCallWork
		Voice	AfterCallWork
		Email	AfterCallWork
9:00 AM	9:09 AM	Telefon	CallInbound
		Voice	CallInbound
		Email	LoggedOut

Adherence Totals Report

To configure the report:

1. Complete steps 1 to 6 in Adherence Reports, selecting **Adherence Totals Report** in the Objects pane.
2. Click **Next**.
3. In the **Target** section, select **Agent**, **Team**, or **Site** from the drop-down list.
4. Optional: Select the **Exclude Days Without Shifts** check box and then, click **Next**.
5. On the **Data** screen, select the targets (agents, teams, or sites) that you want to include in the report. **You can expand business units to display their sites. If you selected Team or Agent on the Target screen, you can further expand the tree's branches. You can select across multiple sites.**
6. Click **Finish**.
The report appears in the Report Viewer.

The report takes one of three forms depending on the target selected. The Site, Team, and Agent reports are detailed separately below.

Site Adherence Totals Report

Here's what's in the report:

Business Unit [header]	The name of the business unit, if applicable, and its time zone.
Date Period [header]	The time range covered by the report.
Site	The name of each site included in the report.
Total Time	The combined total of the duration of the shift in the Master Schedule plus the non adherent time outside the shift for agents in each site.
Duration of Non Adherence	The length of time agents in each site were non adherent (within the shift and outside of the shift).
Duration of Non Adherence Out of Schedule	The length of time agents in each site were non adherent outside of the shift. This number makes up part of the Total Time and Duration of Non Adherence.
% of Adherence	The percentage of time that the agents in each site spent in a compliant state for each day included in the report.
% of Adherence per Day	The average of the compliant time for all sites for the specified day.
% Adherence per Week	The average of the compliant time for all sites for the specified week.
% Adherence per X Weeks	The average of the compliant time for all sites, for your specified period of up to six weeks.
% Adherence per Month	The average of the compliant time for all sites for the specified month.
% of Adherence for the Business Unit	The total average compliant time for all sites for the specified date range.

Team Adherence Totals Report

Here's what's in the report:

Business Unit [header]	The name of the business unit, if applicable, and its time zone.
Site [header]	The name and time zone of the site.
Date Period [header]	The time range covered by the report.
Team	The name of each team included in the report.
Total Time	The combined total of the duration of the shift in the Master Schedule plus the non adherent time outside the shift for agents in each team.
Duration of Non Adherence	The length of time agents in each team were non adherent (within the shift and outside of the shift).
Duration of Non Adherence Out of Schedule	The length of time agents in each team were non

	adherent outside of the shift. This number makes up part of the Total Time and Duration of Non Adherence.
% of Adherence	The percentage of time that agents in each team spent in a compliant state for each day included in the report.
% of Adherence per Day	The average of the compliant time for all teams on the specified day.
% Adherence per Week % Adherence per X Weeks % Adherence per Month	The average of the compliant time for all teams for the specified week. The average of the compliant time for all teams, for a specified period of up to six weeks. The average of the compliant time for all teams, for the specified month.
% of Adherence for Site	An average of all daily adherence totals for the date period.

Agent Adherence Totals Report

Here's what's in the report:

Site [header]	The name and time zone of the site.
Team [header]	The team displayed in the report.
Date Period [header]	The time range covered by the report. Each day is shown separately.
Agent	The name of each agent included in the selected team.
Total Time	The combined total of the duration of the shift in the Master Schedule plus the non adherent time outside the shift for each agent.
Duration of Non Adherence	The length of time each agent was non adherent (within the shift and outside of the shift).
Duration of Non Adherence Out of Schedule	The length of time each agent was non adherent outside of the shift. This number makes up part of the Total Time and Duration of Non Adherence.
% of Adherence	The percentage of time that each team spent in a compliant state for each day included in the report.
% of Adherence	The percentage of time that each agent spent in a compliant state for each day included in the report.
% of Adherence per Day	The average of the compliant time for all agents on the specified day.
% Adherence per Week % Adherence per X Weeks % Adherence per Month	The average of the compliant time for all agents for the specified week. The average of the compliant time for all agents, for a specified period of up to six weeks. The average of the compliant time for all agents, for the specified month.

% of Adherence for Team	An average of all daily adherence totals for the date period.
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Agent States Report

To configure the report:

1. Complete steps 1 to 6 in Adherence Reports, selecting **Agent States Report** in the Objects pane.
2. Click **Next**.
3. On the **Data** screen, select the agent(s) that you want to include in the report.
You can expand business units to display their sites, teams, and agents.
4. Click **Next**.
5. On the **Agent states** page, select the Agent States that you want to include in the report. Clear the check boxes for Agent States that you want to omit. If you want to, enter any **Reason Code** with which you want to filter the report.
6. Click **Finish**.
7. The report appears in the Report Viewer.

Here's what's in the report:

Site [header]	The site's name and time zone.
Team [header]	The team to which the selected agent belongs.
Agent [header]	The agent whose status is displayed in the report.
Date Period	The dates that you selected in the Reports Wizard.
Agent State	The name of the schedule state.
Reason	If you are using reason [Aux] codes, the code associated with an occurrence of the schedule state.
Start Time	The time at which the agent enters the schedule state.
End Time	The time at which the agent switches to another state.
Duration	Duration of the schedule state.
Total Duration Per Day (row)	The combined time of the schedule states per day.
Total Duration Per Date Period (row)	The combined time of the schedule states per date period.

Agent States Sub Report

The Agent States report has a Channels sub report that provides separate data for each media channel and aggregated real-time state information for those schedule state groups with no specified

channel. The data in each record of the report is aggregated and contains the following columns:

- **Channel**—The name of the channel.
- **Agent State**—Real-time state of the agent on that specific channel.
- **Reason**—If present, a list of reasons for a specific channel. (This column is only displayed in the Agent States report.)

The order and format of these columns is as shown in the example below.

Agent States Report

[illegible]

Time zone ECT

Team	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th	14th	15th	16th	17th	18th	19th	20th	21st	22nd	23rd	24th	25th	26th	27th	28th	29th	30th	31st	32nd	33rd	34th	35th	36th	37th	38th	39th	40th	41st	42nd	43rd	44th	45th	46th	47th	48th	49th	50th	51st	52nd	53rd	54th	55th	56th	57th	58th	59th	60th	61st	62nd	63rd	64th	65th	66th	67th	68th	69th	70th	71st	72nd	73rd	74th	75th	76th	77th	78th	79th	80th	81st	82nd	83rd	84th	85th	86th	87th	88th	89th	90th	91st	92nd	93rd	94th	95th	96th	97th	98th	99th	100th
Team 1	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100

Agent Lund , Krist

Date Period: 4/1/10 - 4/30/10

4/12/10

Start Time	End Time	Duration	Agent State	Reason
12:00 AM	8:56 AM	8:56	LoggedOut	
		Voice	LoggedOut	
		Email	LoggedOut	
8:56 AM	9:09 AM	0:13	CallInbound	3, 5
		Voice	CallInbound	3
		Email	LoggedOut	5