



Nortel Workforce Management

Metadata Guide

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New in this release

The following sections detail what's new in *Metadata Guide* NN44480-117) for Workforce Management Release 7.0.

- ["Features" \(page 5\)](#)

Features

This is the first release of *Metadata Guide* NN44480-117).

Introduction

This guide is intended for use by ad hoc query analysts. It documents for you query subjects and topics that you can use in ad hoc queries using the Cognos Query Studio.

Please note that this document is intended primarily for viewing on-line. However, the format of the document is based on that of a printed manual, to support customers who print all or portions of the document. For similar reasons, entries in the Table of Contents, cross references, and index entries refer to page numbers. Those same entries function as hyperlinks for ease of use when the document is viewed electronically.

Note: Colors may not print legibly on black and white printers. If you are using a non-color printer, select the option to print colors as black.

In addition, please note that any screen shots used in this guide are for illustrative purposes only. There may be some differences between what you see in the product and these screenshots, but those differences should not be significant or affect the accuracy of the information contained in this guide.

This introductory section to the guide provides information on:

- ["User Guide Content Overview" \(page 7\)](#)
- ["Intended Audience for This Guide" \(page 8\)](#)
- ["Conventions Used in This Guide" \(page 8\)](#)
- ["Customer support" \(page 8\)](#)

User Guide Content Overview

This guide consists of the following:

- ["Workforce Management Basics" \(page 11\)](#): gives you a basic overview of roles and access rights, logging into Workforce Management's web application, navigating through the Suite, getting help, and logging off.
- ["Cognos and ReportNet" \(page 23\)](#): introduces Cognos concepts and terminology that will be useful to you in creating ad hoc queries.

- "Query Subjects" (page 27): lists and describes all query subjects that are part of the Scorecards Reporting Cognos model. A Query Subject is a grouping of entities that can be used to filter the information that is contained on a report. In addition, it discusses the topics that are part of Scorecards Reporting Cognos model. A topic is the actual measure data for a set of query subjects.

Intended Audience for This Guide

This guide is designed to be used by query analysts. They are expected to be experienced in working with contact center equipment and software applications as well as PC workstation hardware and software, and databases.

Conventions Used in This Guide

The following table describes the Standard Conventions table highlights conventions used to describe user interaction, as well as special notations.

Standard Conventions

Area	Description
Menu Items	Menu items are highlighted in bold as in the following example: From the menu, choose File > Preferences > Options .
Document Names	Other Nortel Systems documents are referred to using italics. For example: Refer to the <i>Quality Monitoring 7.7 Installation Guide</i> for more information.
Buttons, Functions, and Dialog Box and Window Names	Specific button or function names are highlighted in bold. The following example shows how a button and dialog name are referred to in the documentation: Click OK, and then choose the Restore Database dialog box.
User Variables	When the user is expected to type a value, the name of the variable to be replaced is surrounded by < > . The following are examples: <Your ER Server Name> The notation <Your ER Server Name> refers to the name of your Enterprise Reporting server. When you see this notation, replace it with the actual name of your Enterprise Reporting server.

Customer support

This section explains how to get help for Nortel products and services.

Finding the latest updates on the Nortel Web site

The content of this documentation was current at the time the product was released. To check for updates to the latest documentation, go to www.nortel.com/documentation.

Getting help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support web site:

www.nortel.com

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products.

- download software, documentation, and product bulletins
- search the Technical Support web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting help over the phone from a Nortel Solutions Center

If you do not find the information you require on the Nortel Technical Support web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4Nortel (1-800-466-7835). Outside North America, go to the following web site to obtain the phone number for your region:

www.nortel.com/callus

Getting help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

www.nortel.com/erc

Getting help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

Workforce Management Basics

To meet the needs of a broad spectrum of enterprises, the Workforce Management portion of the Workforce Optimization Solution is available in pre-packaged solutions that deliver different levels of functionality.

The Operational Series Workforce Management Package is comprised of functionality designed to optimize agent performance, reduce risk, and automate manual processes such as forecasting and scheduling. It includes: :

- **Forecasting and Scheduling**—Client software used for daily and weekly forecasting and scheduling.
- **Web-Enabled Self-Service**—A standard, web-based interface module for agents, supervisors, and administrators.
- **Advanced Adherence**—Real-time agent adherence tracking, adherence management capabilities for monitoring adherence to schedule for deferred media, including aux codes and non-phone-based activities, as well as enabling management of adherence exceptions.
- **Basic Scorecards**—Pre-defined role-appropriate scorecards with pre-packaged Workforce Management and Quality Key Performance Indicators (KPIs), which display actual performance information on a daily basis.

Our Advanced Series Workforce Management Package builds on the Operational Series' functionality, and focuses on optimizing enterprise performance by raising first call resolution rates, increasing enterprise revenue generation, and ensuring consistent customer experiences.

In addition to those functions included in the Operational Series, the Advanced Series includes

- **Time Off Management (TOM)**—A web-based module allowing agents to request and supervisors to manage agents' time-off and vacation requests. This module is also an option for the Operational Series.

- **Advanced Scorecards**—A superset of the scorecards found in Basic Scorecards, as well as the ability to display trend information compared to goals.

Note: An even deeper level of functionality for Scorecards is provided with KPI Design, which provides users with the ability to define additional data sources types, source measures, KPIs, and to connect custom adapters from these additional data sources.

- **Strategic Planner**—Allows you to plan long term for multi-skilled contact center and enterprise back-office environments, assess the operational and financial benefits and impacts of different scenarios before making decisions, increase forecasting accuracy with sophisticated analysis of historical data, plan your resources to reflect projected customer demand and corporate objectives, develop optimal staffing plans that minimize costs while meeting service goals, and provide executives with the information they need to review and rapidly approve budgets and plans.

The Strategic Series Workforce Management Package builds on the Advanced Series' functionality.

In addition to those functions included in the Advanced Series, the Strategic Series includes:

- **Learning Lesson Management**—Enables agents and supervisors to access on-demand learning, to enhance their skills, and to increase their productivity and performance.
- **Content Producer**—an application comprised of editing, authoring, and conversion tools to develop interactive clips for internal training and assessment.

Optional functions for the above packages include among other functions:

- **Multi-Contact**—Enables forecasting and scheduling for additional media other than phone, such as chat, e-mail, etc.
- **Shift Bidding**—A web-based module facilitating automated shift bidding.
- **Multi Week**—Enables you to schedule over a multi-week period rather than one week at a time.
- **Operations**—Allows volume control and workload management, particularly with the financial services arena.
- **Projects**—Nominally part of the Multi-Contact functions, this separately licensed feature expands the solution's functionality to meet the needs of non-customer-facing activities in the financial services and banking arenas.

- Queue Hopping—Allows you to schedule agents to work on different queues at different times.

The Performance Management Series Workforce Management Package is similar to the Advanced Series Workforce Management Package. It includes:

- Strategic Planner
- Volume Capture (part of the Operations functions mentioned above)
- Pulse
- Alerts
- Standard reports
- Ad-hoc reports
- Advanced Adherence
- KPI Design (includes all the functionality of Basic Scorecards and Advanced Scorecards)

This guide assumes at a minimum that you have the Operational Series. Modules and functions that are either optionally available or are only available in the Advanced Series or Strategic Series are appropriately identified in the text.

Note: The Workforce Optimization Solution includes the functions described in this Workforce Management guide. For that reason, you will at times see the product referred to as the Workforce Optimization Solution and at other times as Workforce Management.

The remainder of this chapter provides a short introduction to Nortel Workforce Management. It includes the following sections:

- "[Understanding Roles and Access Rights](#)" (page 14): Understanding how access to all functions in Nortel Workforce Management is controlled. See page 17.
- "[Starting the Web Application](#)" (page 15): Opening and logging into Nortel Workforce Management's web application. See page 19.
- "[Getting Around in the Web Application](#)" (page 17): Introducing the Nortel Workforce Management web application's setup and workflow, navigating in the web application, using its pages, and entering data. See page 21.
- "[Setting Preferences](#)" (page 19): Setting your local time zone, opening page, and other personal preferences. See page 23.
- "[Getting Help](#)" (page 20): Using the web application's help system and other documentation. See page 24.

- "Logging Off the System" (page 21): How to end your session. See page 24.

Understanding Roles and Access Rights

Access to all functions is controlled through the use of roles. See Roles Setup in the Workforce Management Administration Guide. A role defines a user's access rights; each user must be assigned a role in order to log into Nortel Workforce Management and Workforce Management will display or enable only those functions to which a user's role provides access. In Scorecards, your participation in KPIs is based on roles. Each user's role is also assigned a scope. The scope can be either the organization level to which the role applies, campaign to which the role applies, or group to which the role applies. For example, a manager may have access to the records of people in his own organization but not those in other organizations, or a scheduler can have rights to schedule Campaign A, but not Campaign B. Roles limited to generic (non-organizational and non-campaign) functions do not have scopes.

The roles and associated access to the various functions, modules, sections, and tabs within Nortel Workforce Management are described in the documentation set as they would be for a new installation. If your systems has been upgraded from a previous release, your previous settings are maintained, making it possible that users might not have access to certain features. If you want to grant access to these features, you will need to manually modify the role's access rights, as described in Roles Setup in the Workforce Management Administration Guide. Refer to the Workforce Management Roles and Privileges Guide to determine what the various privileges control, as well as their default role assignments.

Workforce Management comes preconfigured with nine different roles:

- **Adhoc Query Analyst:** Adhoc Query Analysts by default have access only to the Ad Hoc Reports section of the Reports module. This section lets them create, edit, and delete ad hoc reports, which are created using the Cognos Query Studio.
- **Administrator:** Administrators can generally set up and administer the Workforce Optimization Suite's functions and organizations, such as Organization Setup, Security Setup, System Setup, Scorecards Setup, and Request Management Setup. Administrators are responsible for operational and business configuration, not for the functions typically performed by Information Technology (IT) organizations.
- **Agent:** Agents can generally view schedules, request timeoff, request shift swaps, participate in shift bidding, run Learning lessons, enter their time and activities, and view their scorecards.
- **Branch Administrator:** Branch administrators can generally set up and administer the Workforce Optimization Solution's functions and

organizations, in the context of retail financial services, which use a subset of the Workforce Management features.

- **Branch Employee:** Branch employees can generally view schedules, and enter their time and activities, and view their scorecards. They are similar to agents, but in the context of retail financial services, which use a subset of the Workforce Management features.
- **Branch Manager:** Branch managers combine some of the functions of managers and schedulers (see below), again in the context of retail financial services, which use a subset of the Workforce Management features.
- **Manager:** Managers can generally manage people, view group schedules, approve agents' requests, view adherence status, authorize adherence exceptions, create and view reports, and view and configure employees scorecards.
- **Scheduler:** In addition to their use of Forecasting and Scheduling, schedulers can use Workforce Management's web application for a variety of tasks, including publishing schedules, viewing adherence data, managing requests, and viewing their own scorecards and organization scorecards.
- **Supervisor:** Supervisors have a more limited set of permissions than managers. They can view scorecards for themselves and their employees, and view highlights. They also can use the Reports module.

Starting the Web Application

There are two ways to start the web application in Quality Monitoring, depending on how your system is configured:

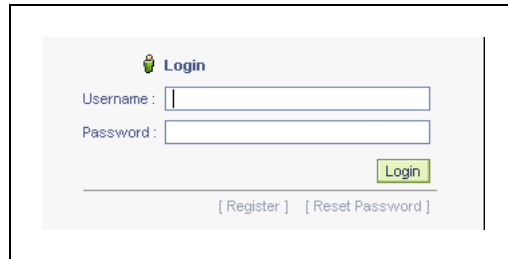
- **Single sign-on:** When your system has been configured for single sign-on, you do not log into Workforce Management, or indeed, any of the Nortel Workforce Management applications, such as eLearning, or Quality Monitoring. All authentication is done when you log into Windows on your computer.
- **Application-dependent sign-on:** You must log into each Nortel Workforce Management application independently.

To start Workforce Management:

Step	Action
1	Open your web browser and type the URL of the server location where Workforce Management is installed.

If your system is configured for single sign-on, Workforce Management displays the default page for your role, or the page that you have selected in Preferences. You can start working with Workforce Management.

If your system is not configured for single sign-on, the Login page opens, a portion of which is shown below:



- 2 Type your **Username** and **Password** (both are case-sensitive), then click **Login**. Workforce Management opens to the default page for your role or the one you have selected in Preferences.

Note: The following are special characters, and cannot be used within Nortel Workforce Management:

- [left square bracket
-] right square bracket
- < less-than sign
- > greater-than sign
- \ reverse solidus (backslash)
- " quotation mark
- & ampersand
- ! exclamation point
- ? question mark

Individual pages within Nortel Workforce Management might restrict the use of some other characters.

—End—

If users have forgotten their password, and provided your company's networking and security environment permits, they can click **Reset Password**. The system will prompt them for certain data to identify them (the same data specified in the section Self-Identification of the Workforce Management Administration Guide), and if an e-mail address has been

registered for them, it will send a temporary password to their e-mail address. They can use this temporary password to log in; the system will then require them to change the temporary password and log in using the new password they have selected.

Note: If an e-mail address is not registered for them, they will be instructed to contact their system administrator either to reset their password or register an e-mail address for them, so they can reset it themselves.

Seat-Based Licensing

Licensing is based either on the total number of employees, or the number of concurrently scheduled employees, also referred to as seats.

If your license is based on seats, and your current schedules, published or unpublished, exceed the number of seats for which you are licensed, all users will see one or both of the following error messages displayed on the login page:

<x> seats are scheduled from <y> to <z>. Your license does not allow more than <n> seats. Please contact your system administrator for assistance.

<x> seats are published from <y> to <z>. Your license does not allow more than <n> seats. Please contact your system administrator for assistance.

These error messages will continue to appear until the number of seats problem has been rectified. If this situation occurs for you and your users, please contact your Verint sales representative as quickly as possible to resolve this situation.

Getting Around in the Web Application

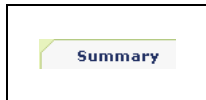
Workforce Management uses a web-browser-based interface with a navigation bar and multiple levels of tabs.



The topmost level of navigation consists of modules, such as the following:



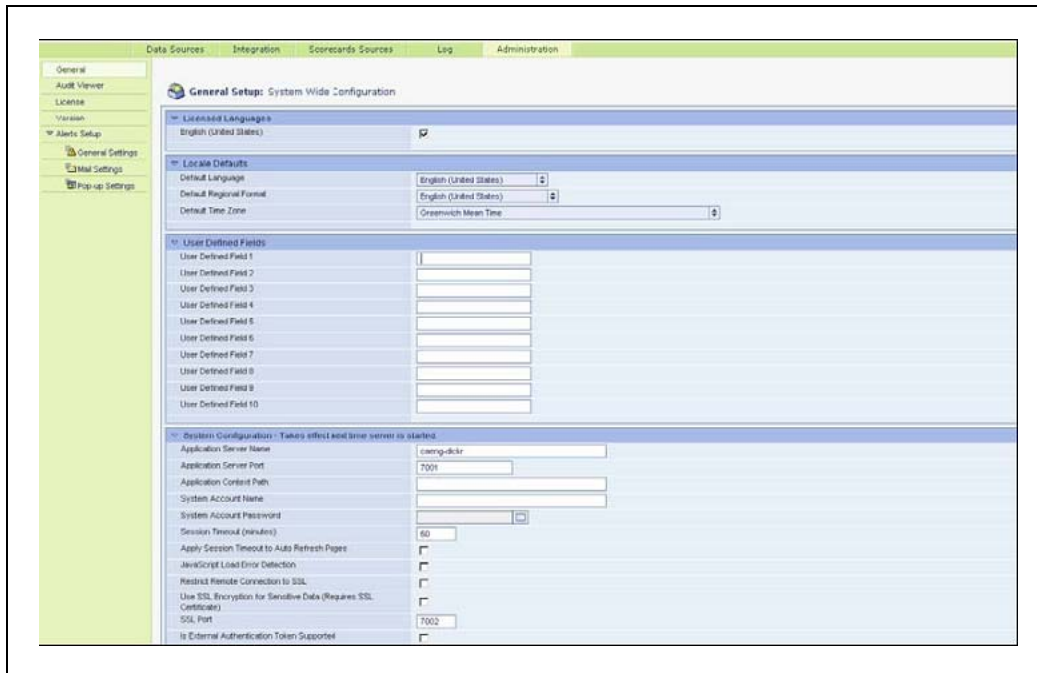
The next level of navigation is referred to as a section, such as the following:



Note: In some modules, there is no need for a section level. Instead, the next navigation level consists of tabs.

In addition, if a role has access to only one module (as is the case for the default agent role), that module is hidden, and the sections below it are displayed as modules. For example, an agent would not see the My Home module, but its sections, such as My Schedule, would be displayed as modules. This behavior allows agents to see more information on the screen without having to scroll.

Finally, a different type of lower-level navigation, consisting of sidebar elements, is only used for administrators in the System module's Administration section:

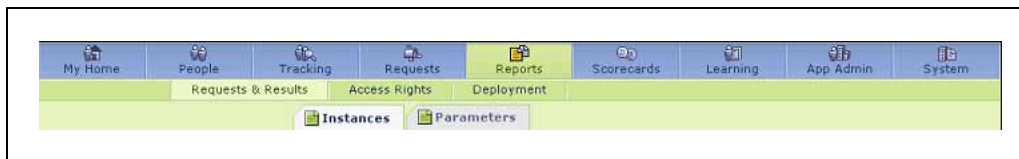


General controls are located above the navigation bar:

Refresh	Click Refresh to update the data on your page.
Print	Click Print to print a copy of the current page.
Send Message	Click Send Message to send a pop-up alert to selected target users. See Sending Messages.
Enter What If	Click Enter What If to enter What If mode. See What If Mode.

Preferences	Click Preferences to open the Preferences window. See Setting Preferences.
Help	Click Help to open the Workforce Optimization Solution Help system and display help for the current page. See Getting Help.
Logout	Click Logout to log out of the Workforce Optimization Solution. See Logging Out.

Navigate by clicking the appropriate button for the module, section, tab, or sidebar element you want to use.



Note that the button configuration changes depending on the user's role.

Note 1: If you resize your browser window, the rightmost buttons on the button bar may be hidden. Resize your browser window, scroll horizontally, or change your screen resolution to see them.

Note 2: If you find yourself frequently changing among two or three tabs, you can open multiple sessions in separate browser windows to make your access to these tabs quicker and easier.

Printing a Page

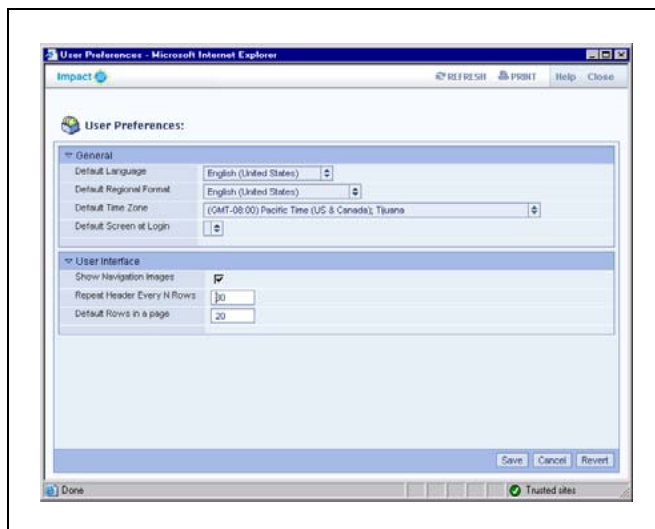
To print a page:

Step	Action
1	Click Print on the navigation bar. The Print dialog box opens.
2	On the Options tab, select Print frames as laid out on screen .
3	Click Print .

—End—

Setting Preferences

You can set your viewing preferences by clicking Preferences on the navigation bar. These settings remain in effect until you change them.



Note: These settings affect only your display. Some of the preference settings shown may not be applicable to you, depending on your license.

Preferences allow you to choose the following display options:

- **Show Navigation Images:** toggles the display of the images shown above the module names in the navigation bar. Suppressing the display of the images allows more information to be displayed on your monitor, somewhat reducing the need to scroll.
- **Show Organization Dropdown in Hierarchical Order:** determines how organizations are displayed in drop-down menus. If this parameter is checked, organizations are displayed in hierarchical order, that is, indentation is used to show peer, parent, and child relationships. All organizations are shown, even those not in a user's scope. If this parameter is not checked, organizations are listed alphabetically. Only organizations in a user's scope are shown.
- **Repeat Header Every N Rows:** the frequency a table or report header will be displayed as you scroll through a list. Type a number in the text box. A blank box sets the number to the default, 30. Enter a zero (0) if you don't want the header to repeat.
- **Default Rows in a page:** for pages that support pagination, the number of rows to display by default for tabular data.

Getting Help

Step Action

- 1 Help for each Workforce Optimization Solution web page is available by clicking the **Help** link on the navigation bar.
-

- 2 On the Help page, click the **User Guides** button to access the major Workforce Management user guides.
- 3 Click the **About** button to view statements about intellectual property, open source attribution, and the user license.
- 4 Click the **Close** button to return to the main page.

—End—

Logging Off the System

You can log out of the Workforce Optimization Solution at any time. Click **Logout** on the navigation bar to log out of the Workforce Optimization Solution.

Cognos and ReportNet

Reports in the Workforce Optimization Solution are created using Cognos, a reporting engine that contains a web-based reporting tool, ReportNet.

The ability to create ad hoc queries is based upon features and functions provided by Cognos. The remainder of this chapter introduces Cognos concepts and terminology that will be useful to you in creating ad hoc queries.

ReportNet

ReportNet consists of the following components:

- Query Studio
- Report Studio
- Cognos Connection
- Framework Manager

Each of these is described in the following sections.

Query Studio

Query Studio is the ad hoc reporting tool for ReportNet, the Web-based reporting solution, and is licensed along with other Nortel Workforce Management packages.

In Query Studio, you can:

- **View data:** Connect to a data source to view data in a tree hierarchy. Expand the query subjects to see query item details.
- **Create reports:** Use the data source to create reports, which you can save and reuse. You can also use an existing report to create a new report.
- **Change the appearance of reports:** Improve the layout of your report. For example, you can create a chart, add a title, or reorder columns for easy comparison.

- **Work with data in a report:** Use filters, summaries, and calculations to compare and analyze data.

To use Query Studio effectively, you should be familiar with the Web, as well as your organization's business and its data.

You may also need to be familiar with the other components of ReportNet.

Report Studio

Report Studio is the professional reporting tool for ReportNet, and is separately licensed. Use it to author more complex reports. Report Studio offers greater flexibility in calculating and formatting results.

Cognos Connection

Cognos Connection is the Web portal for ReportNet. Use the portal to store and access your reports. If you have the necessary permissions, you can also use the portal for report administration, including scheduling and distributing reports.

Administrators use the portal to administer servers, optimize performance, and set access permissions.

Framework Manager

Framework Manager is the data modeling tool for ReportNet. The packages that you use to generate reports are based on models that are created in the modeling tool, Framework Manager.

A model is a set of related query subjects and other objects, such as filters and calculations.

When you open a package in Query Studio, these model objects are visible in the left frame.

Creating an Ad Hoc Report

To create an ad hoc report:

Step	Action
1	Log in to the Workforce Optimization Solution as described in "Starting the Web Application" (page 15) .
2	On the Ad-hoc Reports tab, select the AdhocWFM model. In the right pane you will see a list of any ad hoc reports that have already been created.
3	To edit an existing ad hoc report, select the report and click Edit, otherwise click Create to create anew ad-hoc report from scratch.

Cognos Query Studio opens in a separate window. In its left pane, you will see the model (as described in "Query Subjects" (page 27)), and in the right pane, the work area, into which you may drag and drop Query Items (model elements), to create your report. For details on using Query Studio, refer to the Cognos documentation.

—End—

Be aware that adhoc reporting can greatly affect overall system reporting. It is important to limit the total number of records by an effective use of filters.

The order that model elements (query items) are added to the report is important. Generally, after adding a query item from a large query subject to a report, it is recommended that you add a filter to limit the amount of records.

For example:

- Most reports begin with an employee filter. You can drag in the **Name** item of the **Employee Filter** subject and then add a filter to filter all but one employee filter. (It does not make sense to have multiple filters in one report.)
- After adding the **Employee Filter**, you generally add the dimensions. Often this will be either **Organization Day Dimension** or **Campaign Day Dimension**.

For example, dragging in the Organization query item would produce a list of all organizations to which the employees in the selected Employee Filter belong. Then drag in the Day or Week query item, depending on whether you are aggregating on workdays or workweeks. You now generally should add a filter to constrain the number of days returned (be conservative and start with a few days). At this point, if you were to drag in, for example, the query item Exceptions.Non-Adhering Time, you would get the total non-adhering time for all employees (in filter) per organization per work day. If you wanted it broken down per employee, you would drag in the Employee.Name query item.

Query Subjects

This chapter lists and describes all query subjects that are part of the Workforce Management Reporting Cognos model. A Query Subject is a grouping of entities that can be used to filter the information that is contained on a report.

Note: For most query subjects, dates and times are displayed in the web application user's preference, that is, the View Time zone of the current user. However, the Employee, Supervisor, and VCT Events query subjects show dates and times in the GMT Time Zone.

All Time Intervals show durations in decimal format. The decimal number represents the number of hours. For example, a duration of 25.5 would mean 1 day, 1 hour, and 30 minutes.

EMPLOYEE

Information on the people who work in or for the business represented in this system.

Entity Name	Entity Type	Data Type	Description
Employee	Identifier	String	The full name of the employee.
Organization	Attribute	String	The organization to which the employee currently belongs. Generally, you would not use this Query Item in conjunction with the Organization Day Dimension, because it already has an Organization Query Item.
Type	Attribute	String	The employee type (for example, Full Time, Part Time, etc.).
Hire Date	Attribute	Date Time	The date the employee was hired.
Termination Date	Attribute	Date Time	The date the employee is no longer working for the company.
Badge	Attribute	String	The employee badge.

Entity Name	Entity Type	Data Type	Description
Employee Number	Attribute	String	The employee ID.
Is Team Lead	Attribute	String	Indicates whether the employee is a team lead. This item returns either Yes for true or No for false.
Is Supervisor	Attribute	String	Indicates whether the employee is a supervisor. This item returns either Yes for true or No for false.

PUBLISHED SCHEDULED ACTIVITIES

Represents the employees' published planned activities such as shifts, shift events (breaks), and calendar events. Calendar events include meetings, vacations, etc.

Note: It is not advised to use this query subject in conjunction with UNPUBLISHED SCHEDULED ACTIVITIES or ACTUAL ACTIVITIES query subjects, as unexpected behavior might result. For ACTUAL ACTIVITIES, if you want to know what employees were actually doing with the scheduled activity, either they were not adhering and you can use the EXCEPTION.NON ADHERING ACTIVITY query item, or they were in an activity that adheres to the published scheduled activity.

Entity Name	Entity Type	Data Type	Description
Scheduled Activity	Identifier	String	The activity the employee is scheduled to work.
Scheduled Media	Attribute	String	The media of the activity that the employee is scheduled to work.
Shift	Attribute	String	The name of the shift definition from which this scheduled activity derives. If the activity is part of a calendar event, this item will be blank.
Work Pattern	Attribute	String	The name of work pattern definition where this scheduled activity derives. If the activity is part of a calendar event, this item will be blank.
Activity Start	Identifier	Date Time	The date/time that this scheduled activity begins.
Activity End	Identifier	Date Time	The date/time that this scheduled activity ends.

Entity Name	Entity Type	Data Type	Description
Scheduled Time	Fact	Time Interval	The total duration of this scheduled activity. This duration will always be the difference between Activity End and Activity Start, but, as a fact, it can be used for group level aggregation.
Scheduled Paid Time	Fact	Time Interval	The paid duration of this scheduled activity. At the record level, this is either Scheduled Time or 0, but as a fact, it can be used to aggregate Paid Time across different dimensions.
Scheduled Work Time	Fact	Time Interval	The work duration of this scheduled activity. Some activities are considered work and some are not. For details, see Scheduled Paid Time above.
Scheduled Absent Time	Fact	Time Interval	The absent time for this scheduled activity. Note that this Query Subject deals with the topmost activity from an employee's schedule. This activity is the one that they are required to adhere to, and is, in fact, their schedule. However, it may not always look like the employee's schedule from the Calendar View, which is made up of multi-layered events. Absent Time is the intersection of a Time-off event overlaying a scheduled activity which is considered work (for example, if the Time-off weren't in the schedule, the employee would have been doing work, hence they're absent).
Shift Start	Identifier	Date Time	The start of the shift.
Shift End	Identifier	Date Time	The end of the shift.

UNPUBLISHED SCHEDULED ACTIVITIES

Represents the employees' unpublished planned activities, such as shifts, shift events (breaks), and calendar events. Calendar events include meetings, vacations, etc.

Note: It is not advised to use this query subject in conjunction with PUBLISHED SCHEDULED ACTIVITIES, ACTUAL ACTIVITIES, or EXCEPTIONS query subjects, because unexpected behavior might result. Moreover, exceptions only make sense in conjunction with published schedules.

Entity Name	Entity Type	Data Type	Description
Scheduled Activity	Identifier	String	The name of activity the employee is scheduled to work.
Scheduled Media	Attribute	String	The name of media of the activity that the employee is scheduled to work.
Shift	Attribute	String	The name of the shift definition from which this scheduled activity derives. If the activity is part of a calendar event, this item will be blank.
Work Pattern	Attribute	String	The name of the work pattern definition from which this scheduled activity derives. If the activity is part of a calendar event, this item will be blank.
Activity Start	Identifier	Date Time	The date/time that this scheduled activity begins.
Activity End	Identifier	Date Time	The date/time that this scheduled activity ends.
Scheduled Time	Fact	Time Interval	The total duration of this scheduled activity. This will always be the difference between Activity End and Activity Start , but, as a fact, it can be used for group level aggregation.
Scheduled Paid Time	Fact	Time Interval	The paid duration of this scheduled activity. At the record level, this is either Scheduled Time or 0, but as a fact, it can be used to aggregate Paid Time across different dimensions.
Scheduled Work Time	Fact	Time Interval	The work duration of this scheduled activity. Some activities are considered work and some are not. For details, see Scheduled Paid Time described previously in this table.
Scheduled Absent Time	Fact	Time Interval	The absent time for this scheduled activity. Note that this Query Subject deals with the topmost activity from an employee's schedule. This activity is the one that they are required to adhere to, and is, in fact, their schedule. However, it may not always look like the employee's schedule from the Calendar View, which is made up of multi-layered events. Absent Time is the intersection of a Time-off event overlaying a scheduled activity which is considered work (for example, if

Entity Name	Entity Type	Data Type	Description
			the Time-off weren't in the schedule, the employee would have been doing work, hence they're absent).
Shift Start	Identifier	Date Time	The start of the shift.
Shift End	Identifier	Date Time	The end of the shift.

ACTUAL ACTIVITIES

Actual activities done by employees.

Entity Name	Entity Type	Data Type	Description
Actual Activity	Identifier	String	The name of activity the employee is actually doing.
Actual Start	Identifier	Date Time	The date/time that this activity began.
Actual End	Identifier	Date Time	The date/time that this activity ended.
Actual Time	Fact	Time Interval	The total duration of this activity. This will always be the difference between Actual End and Actual Start, but as a fact, it can be used for group level aggregation.
Actual Paid Time	Fact	Time Interval	The paid duration of this activity (Paid in this case means that the activity's definition has the attribute Is Paid , which is slightly different from the meaning of paid for scheduled activities.) At the record level, this is either Actual Time or 0, but because it's a fact, it can be used to aggregate Paid Time across different dimensions.

EXCEPTIONS

Tracks the periods when employees do not adhere to their planned activities.

Note: It is not advised to use this query subject in conjunction with UNPUBLISHED SCHEDULED ACTIVITIES or EXCEPTIONS query subjects, because unexpected behavior might result.

Entity Name	Entity Type	Data Type	Description
Non-Adhering Activity	Identifier	String	The name of activity the employee was actually doing when the employee should have been doing something else.

Entity Name	Entity Type	Data Type	Description
Exception Start	Identifier	Date Time	The date/time that this exception began.
Exception End	Identifier	Date Time	The date/time that this exception ended.
Approved By	Attribute	String	The username of the employee who approved this exception. If the exception is not approved, this item will be blank.
Is Approved	Attribute	String	Indicates that this is an approved exception. Returns either Yes for true or No for false.
Non-Adhering Time	Fact	Time Interval	The total duration of this exception. This will always be the difference between Exception End and Exception Start , but as a fact, it can be used for group level aggregation.
Approved Time	Fact	Time Interval	The approved duration of this activity. At the record level, this is either Non-Adhering Time or 0, but as a fact, it can be used to aggregate Approved Time across different dimensions.

EMPLOYEE FILTER

Employee filters created by current logged-in users. An employee filter selects a list of employees based on some complex search criteria.

Entity Name	Entity Type	Data Type	Description
Employee Filter	Identifier	String	Name of the employee filter. Generally, this query item is the first to be dragged into a report. Afterwards, a filter is applied that constrains to a single employee filter.

ORGANIZATION DAY DIMENSION

Used to aggregate data according to the organization work day or work week (taking into account the organization's day or week boundary).

Entity Name	Entity Type	Data Type	Description
Organization	Identifier	String	The name of the organization.

Entity Name	Entity Type	Data Type	Description
Day	Identifier	Date Time	The date/time (in the user's timezone) that the organization's work day begins. This includes the organization day boundary.
Local Day	Identifier	Date Time	The date/time (in the organization's timezone) that the organization's work day begins. This includes the organization day boundary.
Local Week	Identifier	Date Time	The date/time (in the organization's timezone) that the organization's work week begins. This includes the organization week boundary.

CAMPAIGN DAY DIMENSION

Used to aggregate data according to campaign day or week (taking into account the campaign's day or week boundary).

Entity Name	Entity Type	Data Type	Description
Campaign	Identifier	String	The name of the campaign.
SP	Identifier	String	The "name" of the campaign week (the start and end day of the campaign week).
Local Day	Identifier	Date Time	The date/time that the campaign's work day begins. This includes the organization day boundary.
Local Week	Identifier	Date Time	The date/time that the campaign's work week begins. This includes the organization week boundary.

SUPERVISOR

Employees who supervise other employees.

Entity Name	Entity Type	Data Type	Description
Supervisor Name	Identifier	String	The full name of the supervisor.
Organization	Identifier	String	The organization to which the supervisor currently belongs. Generally, you would not use this Query Item in conjunction with Organization Day Dimension , because it already has an Organization Query Item.

Entity Name	Entity Type	Data Type	Description
Supervisor Number	Attribute	String	The supervisor's employee ID.
Supervisor Hire Date	Attribute	Date Time	Date the supervisor was hired.
Supervisor Termination Date	Attribute	Date Time	The date the supervisor is no longer working for company.
# Employees Reporting To	Fact	Number	The number of employees that report to this supervisor. This item can be useful when you want to normalize some fact (for example, total Non-Adhering Time) based on how many employees report a supervisor.

TEAM LEAD

Employees who are team leaders of other employees.

Entity Name	Entity Type	Data Type	Description
Team Lead Name	Identifier	String	The full name of the team lead.
Organization	Identifier	String	The organization to which the team lead currently belongs. Generally, you would not use this Query Item in conjunction with Organization Day Dimension , because it already has an Organization Query Item.
Team Lead Number	Attribute	String	The team lead's employee ID.
Team Lead Badge	Attribute	String	The badge of the team lead.
# Employees Reporting To	Fact	Number	The number of employees that report to this team lead. This item can be useful when you want to normalize some fact (for example, total Non-Adhering Time) based on how many employees report a team lead.

PERFORMANCE STATISTICS

Includes historical (actual) data representing measures of performance, as well as forecast and predicted data that is generated from scheduling work resources.

Note: All facts (for example, AHT, ASA, CV, PCA, etc.) refer to the 15 minutes beginning at DateTime.

Entity Name	Entity Type	Data Type	Description
Year	Identifier	Date Time	Date/time of the beginning of the year. This item is useful when doing yearly aggregations.
Month	Identifier	Date Time	Date/time of the beginning of the month. This item is useful when doing monthly aggregations.
DateTime	Identifier	Date Time	Date/time of the beginning of the interval to which all these facts refer.
Date	Identifier	Date	Date portion of beginning of the interval.
Time	Identifier	Time	Time portion of beginning of the interval
Hour	Identifier	Date Time	Date/time of the beginning of the hour for this interval. This item is useful when doing hourly aggregations.
Campaign	Identifier	String	Name of campaign to which these statistics belongs.
Queue	Identifier	String	Name of the queue to which these statistics belong.
Media	Identifier	String	Name of media to which these statistics belongs.
Actual AHT	Fact	Number	Actual average handling time. This value is normalized by call volume so that aggregation works correctly.
Actual ASA	Fact	Number	Actual average speed to answer. This value is normalized by call volume so that aggregation works correctly.
Actual PCA	Fact	Number	Actual percentage of calls answered within the service time. This value is normalized by call volume so that aggregation works correctly.
Actual Staffing	Fact	Number	Actual staffing.
Actual CV	Fact	Number	Actual call volume.
Actual FTE	Fact	Number	Actual full time agent equivalents.
Actual Abandonment	Fact	Number	Actual abandonment.
Actual Occupancy	Fact	Number	Actual occupancy.

Entity Name	Entity Type	Data Type	Description
Actual Backlog	Fact	Number	The actual backlog value for the corresponding Queue and time interval. The aggregation formula for this statistic is a simple average (take the total, and divide by the number of 15-minute intervals).
Forecasted AHT	Fact	Number	Forecasted average handling time. This value is normalized by call volume so that aggregation works correctly.
Forecasted ASA	Fact	Number	Forecasted average speed to answer. This value is normalized by call volume so that aggregation works correctly.
Forecasted Backlog	Fact	Number	The forecasted backlog value for the corresponding queue and time interval. The aggregation formula for this statistic is a simple average (take the total, and divide by the number of 15-minute intervals).
Forecasted PCA	Fact	Number	Forecasted percent calls answered within service time. This value is normalized by call volume so that aggregation works correctly.
Forecasted CV	Fact	Number	Forecasted call volume.
Forecasted FTE	Fact	Number	Forecasted full time agent equivalents.
Forecasted Abandonment	Fact	Number	Forecasted abandonment.
Forecasted Occupancy	Fact	Number	Forecasted occupancy.
Required ASA	Fact	Number	Required average speed to answer. This value is normalized by call volume so that aggregation works correctly.
Required PCA	Fact	Number	Required percentage of calls answered within the service time. This value is normalized by call volume so that aggregation works correctly.
Required FTE	Fact	Number	Required full time agent equivalents.
Required Abandonment	Fact	Number	Required abandonment.

EMPLOYEE SKILLS

Describes the skills of an employee.

Entity Name	Entity Type	Data Type	Description
Skill	Attribute	String	Name of the employee's skill.
Proficiency	Attribute	Number	The employee's proficiency for this skill.
Priority	Attribute	Number	The priority for this skill.

VCT EVENT

Shows the different stages of work performed on each Volume Capture Tool (VCT) queue, which are queues having a Operations or Project media type, at a certain date and time. The VCT Event information allows you to find out the amount of work "checked-out" from each VCT queue or "checked-in" when completed. You can track the work that arrived or view the status of each VCT queues' inventory on an intra-day and/or intra-week basis.

Entity Name	Entity Type	Data Type	Description
Batch	Attribute	Number	The batch number represents a group ID that identifies the chains created for VCT Events.
Event Type	Attribute	String	The type of VCT Event. Possible values are: <ul style="list-style-type: none"> • Arrivals • Check-Out • Check-In • Inventory Adjustment • Inventory Balance e • WIP Balanc
Value	Fact	Number	Shows the value of the VCT Events (arrivals, check-out, or check-in).
Inventory	Attribute	Number	The net total of outstanding work for each VCT queue.
Work in Progress	Attribute	Number	The current net total work that has been checked out by an employee for the corresponding VCT queue.
Queue	Attribute	String	The name of the VCT queue to which this VCT event applies.
Queue Description	Attribute	String	The queue's description.
Queue Media	Attribute	String	The media type for the queue specified in the Queue column.

Entity Name	Entity Type	Data Type	Description
Organization	Attribute	String	The organization to which the VCT queue is assigned.
Time Standard	Fact	Number	The activity handle time (in seconds) for the VCT queue, set in the Work Queue Configuration tab.
Creation Date	Fact	Date Time	The date/time when this VCT Event was created.
Last Edit Date	Fact	Date Time	The date/time when this VCT Event was edited.

Nortel Workforce Management

Metadata Guide

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