

Workforce Management Agent Help

Schedules

10/15/2021

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- Agent

Views your schedule and other agents' schedules.

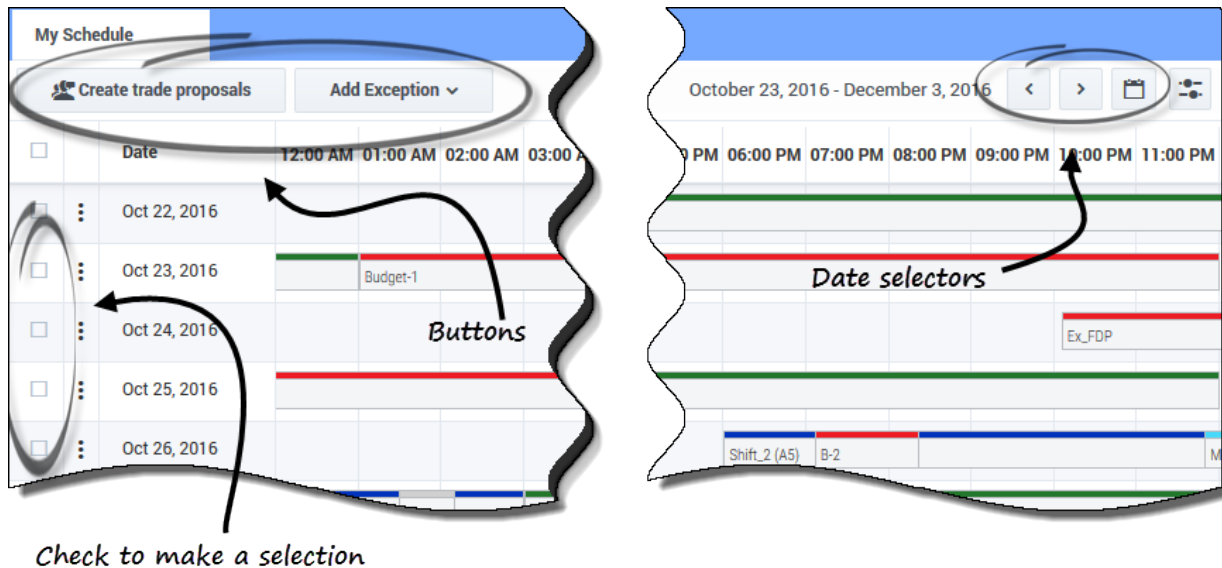
Related documentation:

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Use the **Schedule** module to view your schedules and its details or view other agents' schedules. Click **Schedule** to reveal the drop-down menu that lists the three views in this module:

- My Schedule—Displays your schedule information. To display any single week or multiple weeks, see Changing the date. This view opens by default after you log in, but you can change the default, see Viewing my settings.
- My Schedule Details—Displays the current (or selected) week's schedule in detail.
- Other Schedules—Displays a filterable, sortable, and searchable list of other agents and their schedules.

Common controls



The **My Schedule** and My Schedule Details views have these common controls:

- Create trade proposals *button*—Opens a dialog box that enables you to create new trade proposals for the days that you have selected in this view.

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- **Add Exception *button***—Opens a dialog box that enables you to add an exception for the day(s) that you have selected in this view.
 - **Pending Schedules *button***—Works as a toggle, enabling you to view your pending schedules, including exceptions.
 - **Date and Calendar *icons***—For a description of these controls, see Changing the Date.
 - ***check boxes***—Select the check box in the table's first column for each day for which you want to create trade proposals or add exceptions. Then, click Create Trade Proposals or Add Exception.

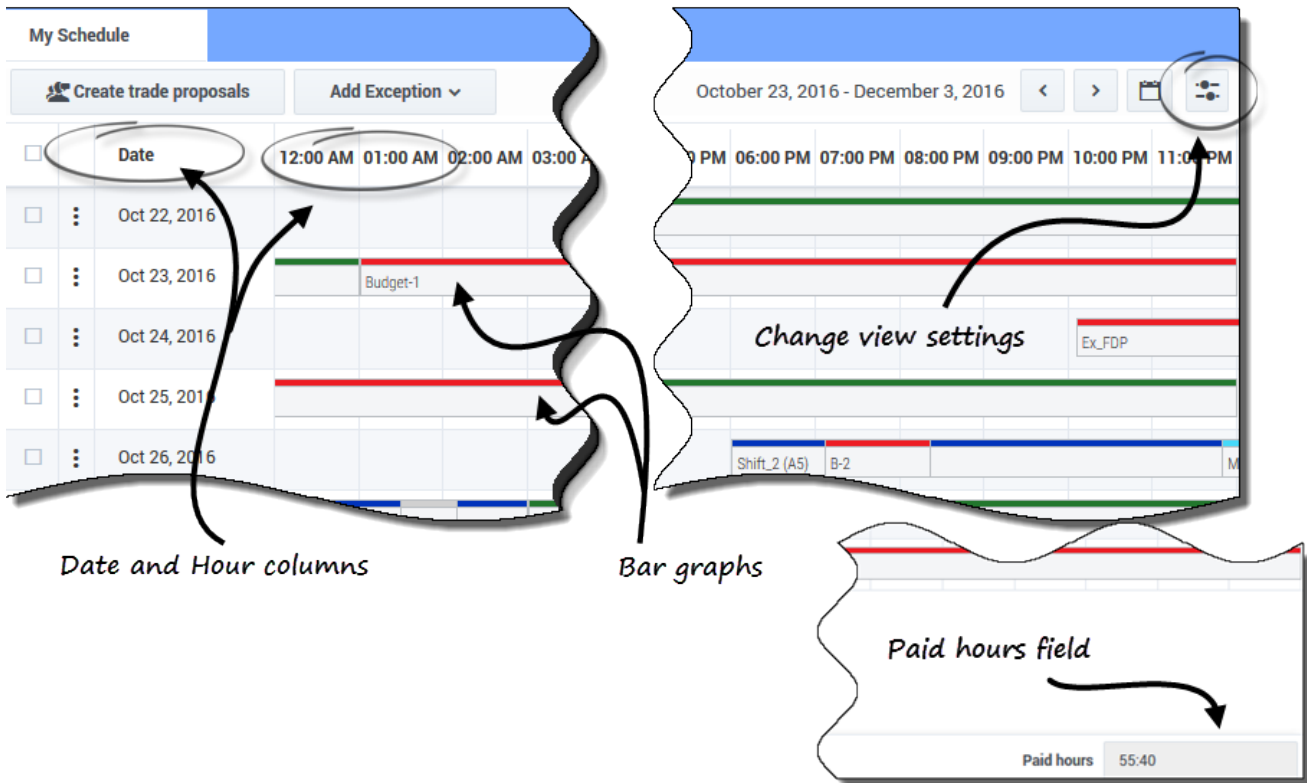
Tip

The **Create trade proposals** and **Add Exception** buttons are hidden if this optional functionality is not enabled for you.

My schedule

The **My Schedule** view displays your schedules in a grid that contains a colored bar graph for each scheduled work day. Each bar graph spans the scheduled hours for the work day, displaying shifts, work items, breaks, meals, and days off in the colors that identify them.

Columns and settings



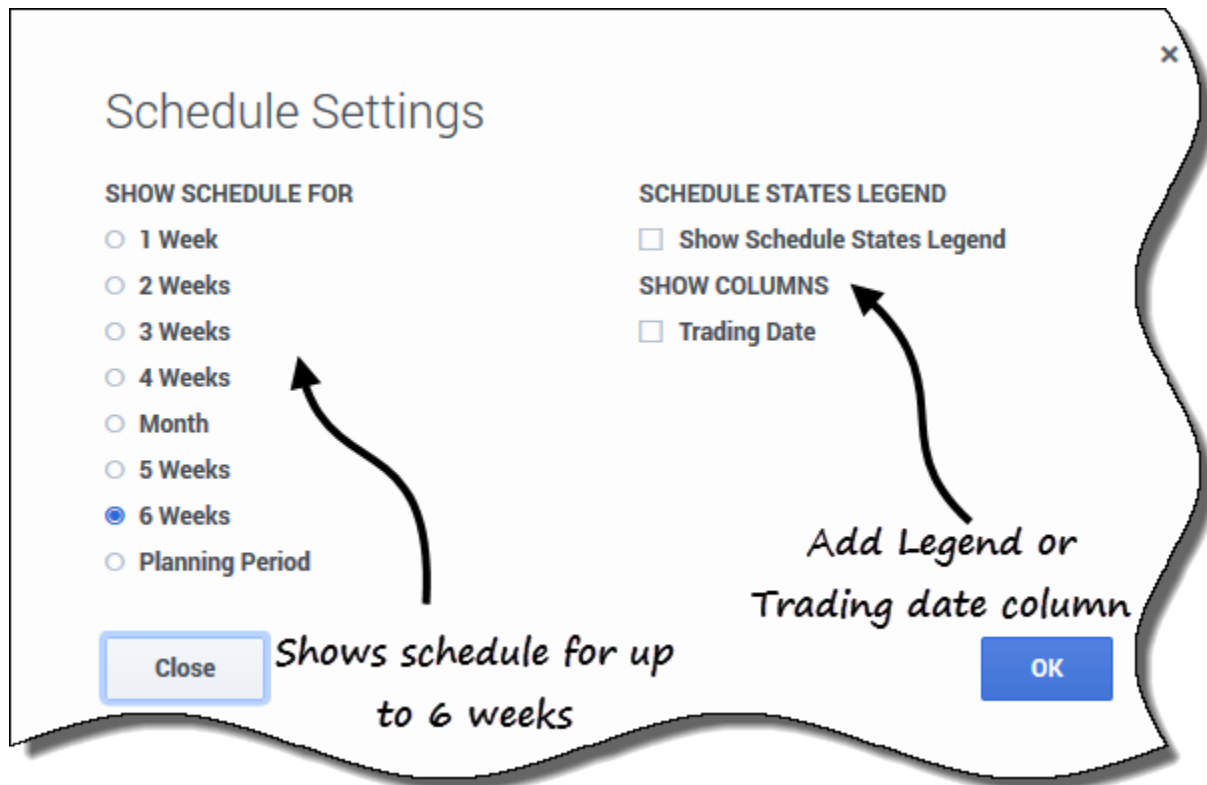
The **My Schedule** view has these additional controls and columns:

- **Settings icon**—Open a dialog box that enables you to change the settings in this view. See Changing Settings in the Schedule View.
- **Actions column**—Presents a drop-down list, enabling you to roll back any published exceptions you entered and delete pending changes (if any).
- **Date column**—Shows each date in the scheduled work week.
- **Hour columns**—Span an entire day with each column representing one hour in the day.
- **bar graphs**—Display the shifts, work items, breaks, meals, exceptions, and days off and the colors that identify them in the work day hours. Click any colored cell in the bar graph to view the details of that particular item.
- **Paid hours field**—Shows the total paid hours for this schedule period.

Tip

Pending schedules are visible only when there are uncommitted changes in your schedule, such as an **Exception** you inserted that is not yet approved by a supervisor.


Changing the view settings



To change the information that is displayed in the **My Schedule** view:


1. In the upper-right corner of this view, click the **Settings** icon.
The Schedule Settings dialog box opens.
2. In the **Show Schedule For** list, choose one of the following radio buttons:
 - 1 week
 - 2 weeks
 - 3 weeks
 - 4 weeks
 - Month
 - 5 weeks
 - 6 weeks
 - Planning Period
3. Check the **Show Schedule States Legend** check box if you want to display the legend at the bottom of this view.
4. Check the **Trade Date** check box if you want to display that column in the schedule grid.
5. Click **OK** to display your selections, or **Close** to discard them.

Rolling back schedules

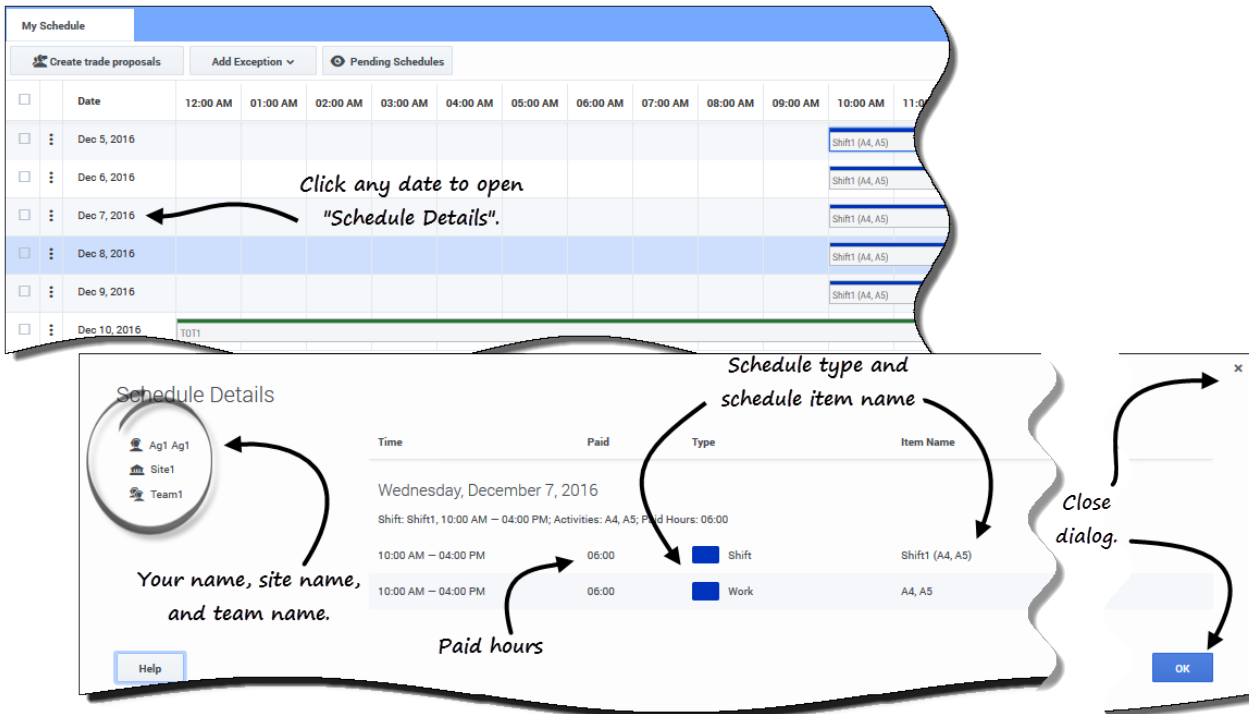
In this view, you can click **Actions**  to open a drop-down list, enabling you to rollback a published schedule. Selecting **Rollback** in the list, rolls back any schedule changes you've made (for example, if an exception was auto committed immediately) and reverts your schedule to the previous state.

To roll back a schedule, see the procedure in My Schedule Details.

Deleting pending schedules changes

At the top of this view, toggling on the Pending Schedules button displays changes that are requested but not yet approved. Clicking **Actions** , opens a drop-down list, enabling you to delete pending changes in your schedule that are not yet approved by your supervisor.

To delete pending changes in your schedules, see My Schedule Details.



The image shows a screenshot of the 'My Schedule' interface. At the top, there are buttons for 'Create trade proposals', 'Add Exception', and 'Pending Schedules'. Below is a calendar grid with columns for each hour from 12:00 AM to 11:00 PM. The dates range from Dec 5, 2016, to Dec 10, 2016. A callout points to the date Dec 7, 2016, with the text: 'Click any date to open "Schedule Details".'

The 'Schedule Details' dialog is shown below, displaying the following information:

- Header:** Schedule type and schedule item name
- Left Panel:** Your name, site name, and team name. (Ag1 Ag1, Site1, Team1)
- Table:**

Time	Paid	Type	Item Name
Wednesday, December 7, 2016			
Shift: Shift1, 10:00 AM – 04:00 PM, Activities: A4, A5, Paid Hours: 06:00			
10:00 AM – 04:00 PM	06:00	Shift	Shift1 (A4, A5)
10:00 AM – 04:00 PM	06:00	Work	A4, A5

Callouts in the dialog include: 'Paid hours' pointing to the 'Paid' column, and 'Close dialog.' pointing to the 'OK' button.

In **My Schedule** view:

- Click any date in the **Date** column to open the schedule details for a specific date in a separate dialog. **The Schedule Details dialog opens showing your name, site, and team name, and the following information in columns**

- Time
- Paid (hours)
- Type (of schedule item, color-coded)
- Item Name (schedule item name)

Viewing trade requests

If your site allows schedule trading, there might be **Trade requests** button at the top of this view. It alerts you to any open trade proposals or responses and shows the number of unanswered requests in brackets. For example, (2). The button displays only if there are open proposals awaiting your response.

The screenshot shows the 'Workforce Management' interface with the 'Schedule' tab selected. A 'Trade requests' button with a notification icon '1' is visible. Below it is a table with columns for 'Date' and time slots from 12:00 AM to 07:00 AM. A message states 'There are no schedules to display for requested period'. An arrow points from the 'Trade requests' button to the '02:00 AM' slot with the text 'Click to open the trade proposal.'

The 'Unanswered Trade Requests' dialog box is shown below, containing the agent name 'AgentF01 AgentL01', a date 'Aug 2, 2017', and buttons for 'Close' and 'Help'. An arrow points from the date to the text 'Click the date to open trade details.'

To view the trade request:

1. Click **Trade requests**.
The **Unanswered Trade Requests** dialog box opens, showing the agent who is making the requests, comments about the trade, and the trade proposal date.

2. Click the date.

- If single-site trading is permitted, the **Trading > Proposals** view opens, enabling you to see trade details and proceed with the proposal.
- If multi-site trading is permitted, the **Trades** view opens, filtered by **Offered to me**.