This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Workforce Management Agent Help

Schedules

10/10/2026

Contents

- 1 Common controls
- 2 My schedule
- 3 Columns and settings
- 4 Changing the view settings
- 5 Rolling back schedules
- 6 Deleting pending schedules changes
- 7 Viewing trade requests

-
- Agent

Views your schedule and other agents' schedules.

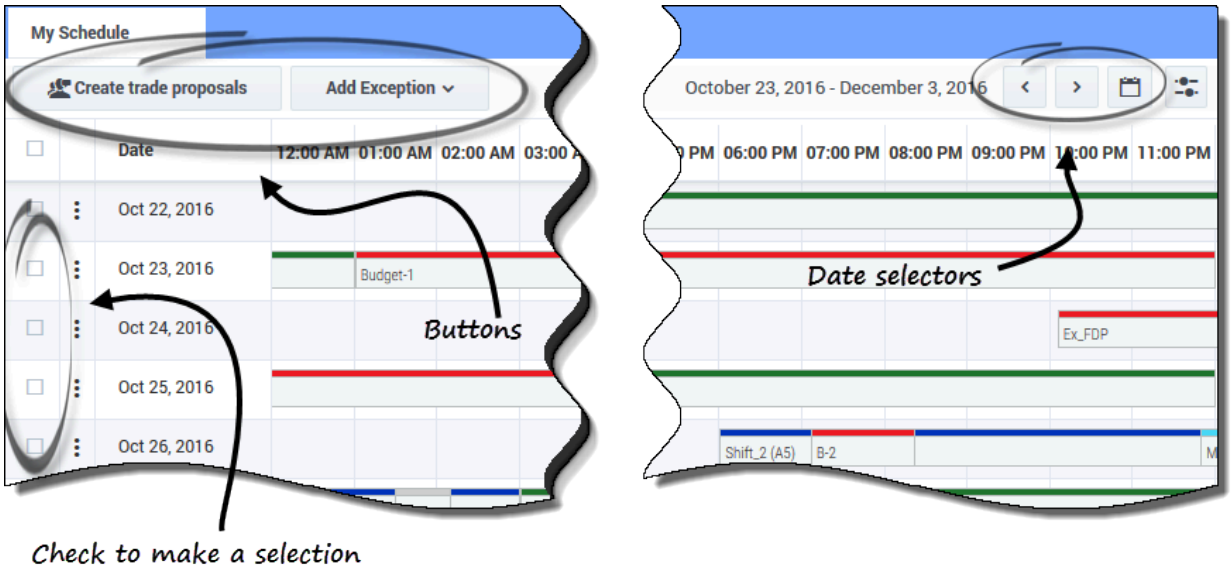
Related documentation:

-

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:

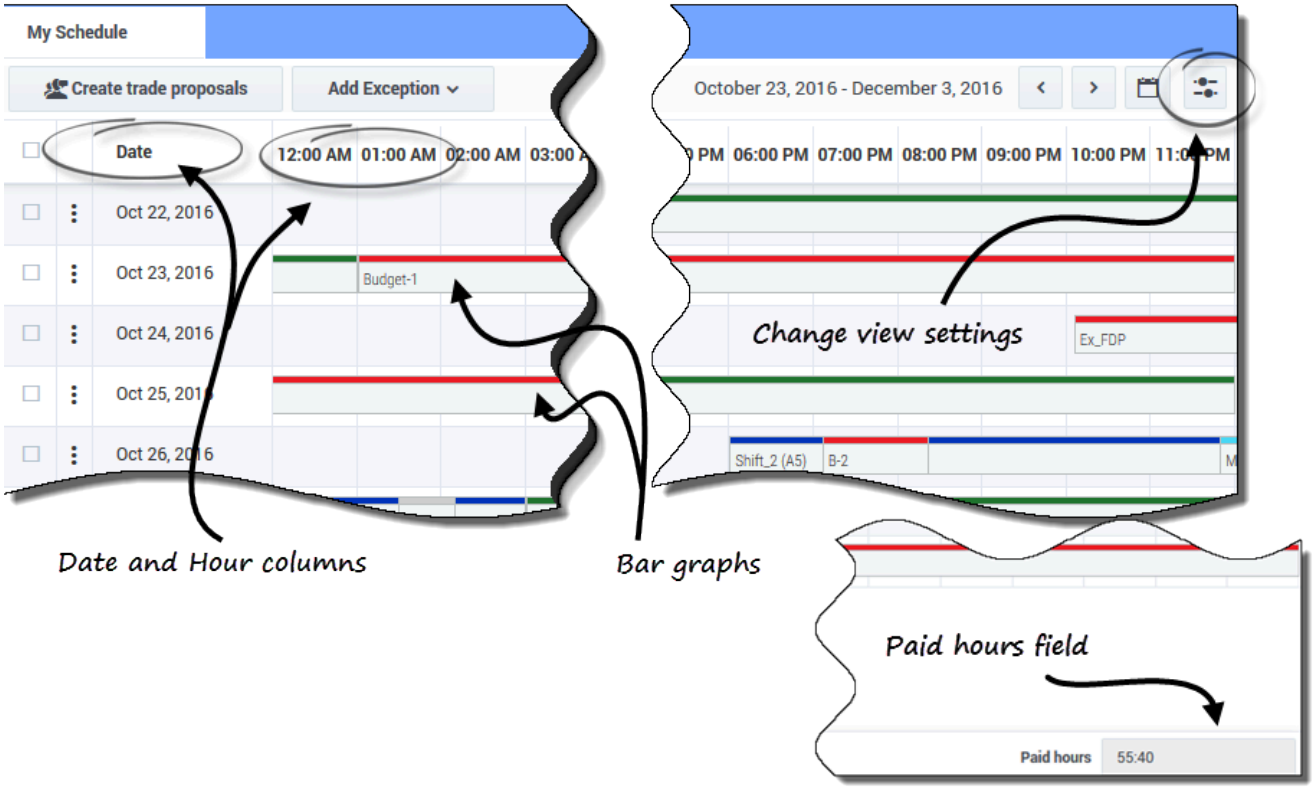
- Create trade proposals *button*—Opens a dialog box that enables you to create new trade proposals for the days that you have selected in this view.
- Add Exception *button*—Opens a dialog box that enables you to add an exception for the day(s) that you have selected in this view.
- **Pending Schedules** *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

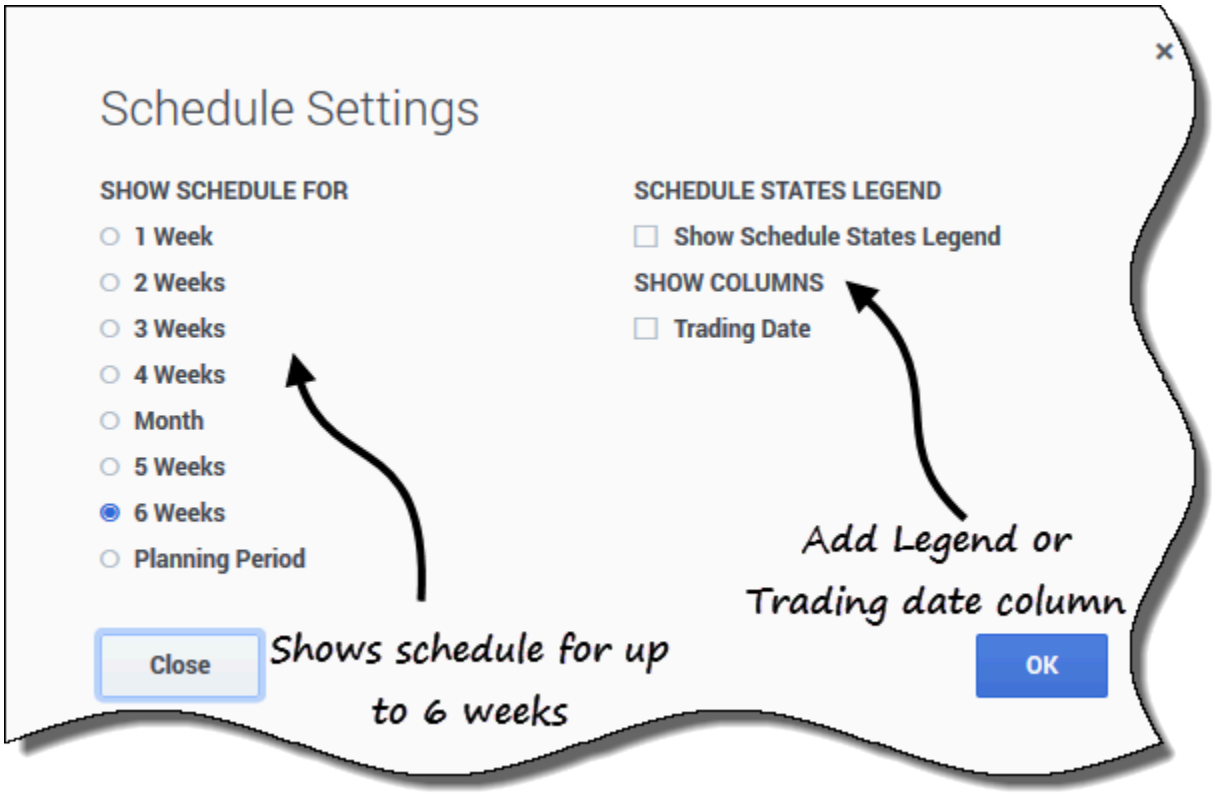


The **My Schedule** view has these additional controls and columns:

- **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

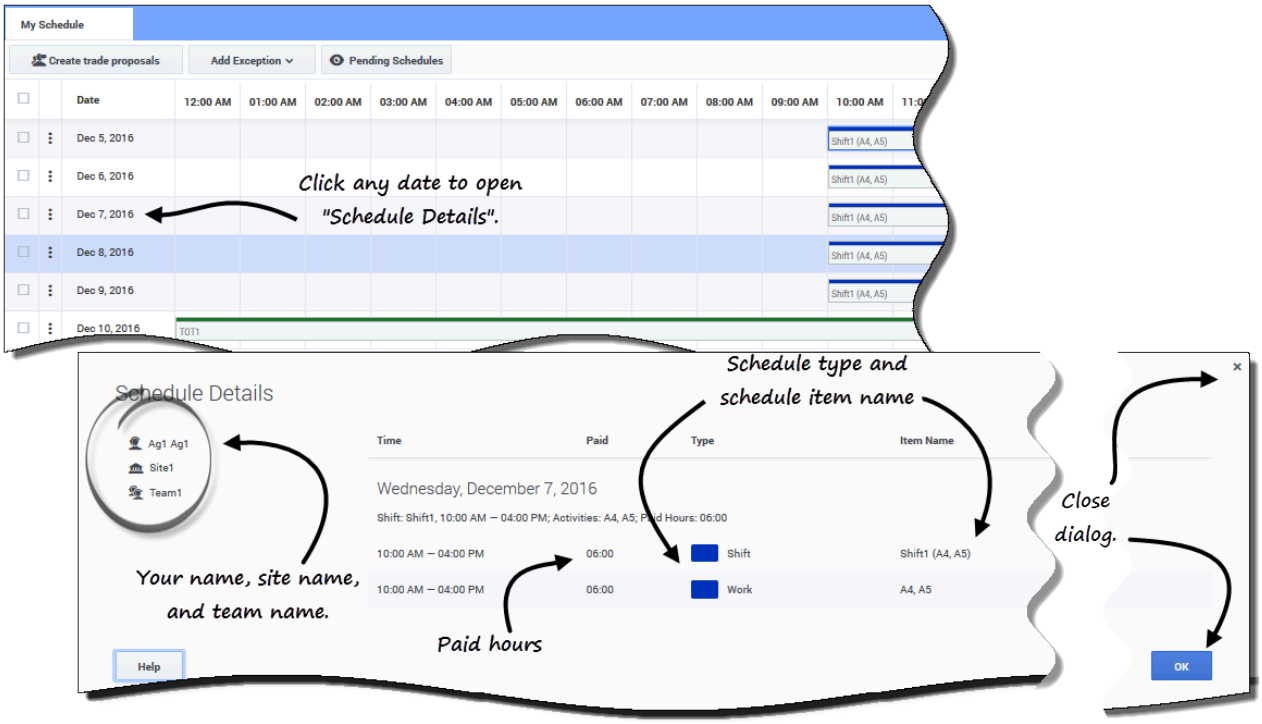
In this view, you can click **Actions** to open a drop-down list, enabling you to rollback a published schedule. Selecting **Rollback** in the list, rolls back any schedule changes you've made (for example, if an exception was auto committed immediately) and reverts your schedule to the previous state.

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.

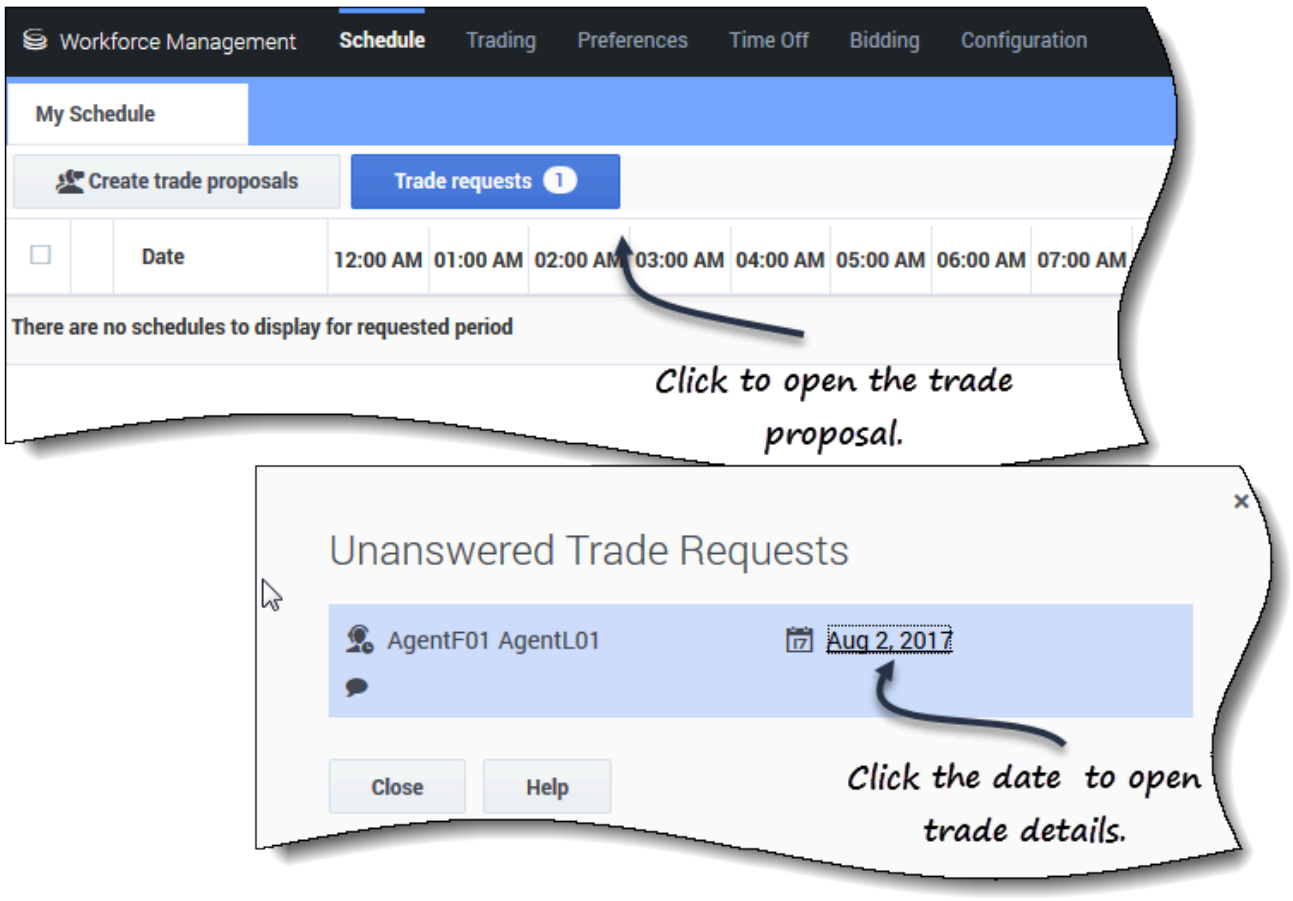


In **My Schedule** view:

- 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.



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**.