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Workforce Management Agent Help

Using shared transport

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- Agent

Manage your participation in shared transport groups.

Related documentation:

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Use the My Shared Transport and Browse Shared Transport views to manage your participation in shared transport. You can create your own shared transport or join an existing one. Shared transport can be a company bus or a carpool arranged by a group of agents.

Tip

Shared Transport is known by many different names worldwide—bus, carpool, ride share, lift share, and paratransit, for example. See Wikipedia for details.

Watch this video to see how shared transport management works:

[Link to video](#)

My shared transport

Use this view to create shared transport, view join requests from others, or leave shared transport. You can also switch to the Browse Shared Transport view if you have not already created a shared transport.


Tip

Creating a new shared transport deletes all of your pending join requests. You can belong to only one shared transport at a time.

Creating shared transport



To create shared transport:

1. In the My Shared Transport view, click **Create**  to open a separate view, enabling you to enter the following shared transport details:
 - In the **Shared Transport Name** field, enter the name of the new shared transport.
 - In the **Comments** field, enter descriptive comments, if any.
2. Click **Save**.

After you save the shared transport, two other buttons appear:

- Leave transport—Enabling you to leave or cancel this shared transport.
- Join requests—Enabling you to view join requests from others for this group.

The shared transport and related information is added as new record in **Browse Shared Transport** table with a status of **Confirmed**. You are automatically added as a participant.

Editing shared transport groups

You can change some of the properties in a shared transport that you created, such as the shared transport name or the comments.

To edit shared transport:

1. Click **My Shared Transport**.
2. When the view opens, change the properties, as required.
3. Click **Save**.

Accepting and declining Join requests

If you have created shared transport for carpooling, you will receive requests from other agents to join your group.

The screenshot shows the 'My transport' interface. At the top, there is a blue header with the text 'Number of pending requests'. Below this, there are two buttons: 'Leave transport' and 'Join requests (1)'. The 'Join requests (1)' button is circled in red. A handwritten arrow points from the blue header to this button with the text 'Click to respond to join requests.' Below the buttons, there are fields for 'Shared transport name' (containing 'ST4'), 'Status: Open', and 'Comments:'. There is also a checkbox labeled 'This is a bus'. Below the main interface, a 'Join requests' dialog box is open. It has a title bar 'Join requests' and a close button 'x'. The dialog contains a table with two columns: 'Agents' and 'Comments'. The 'Agents' column has a checkbox and the text 'Ag1 Ag1'. The 'Comments' column has the text 'Can I join please?'. Below the table are three buttons: 'Cancel', 'Decline', and 'Accept'. A handwritten arrow points from the 'Join requests (1)' button to the checkbox in the dialog with the text 'Check to select agent.'. Another handwritten arrow points from the 'Accept' button to the text 'Accept or decline request.' in the dialog.

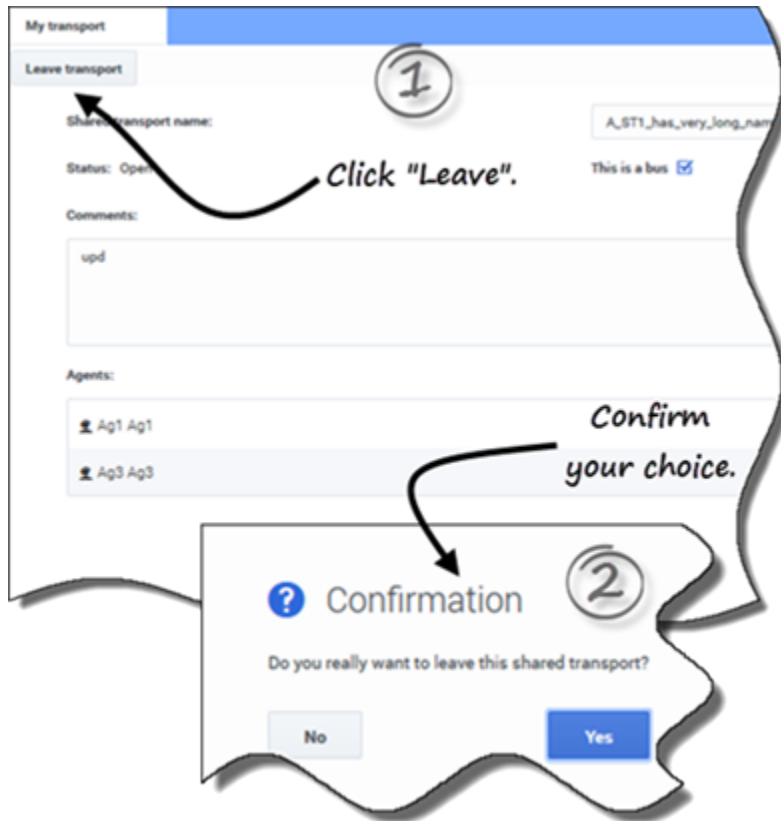
To respond to join requests:

1. In the My Shared Transport view, click the **Join requests** button.
The number in brackets indicates the number of pending requests.
2. When the **Join Requests** dialog opens, click the check box beside the agent's name.
3. Click **Decline** or **Accept**.

Example:

- You receive requests to join from Agent1 and Agent2.
- You accept Agent1's request and decline Agent2's request.
- Agent1 sees the status **Confirmed** in the Browse Shared Transport view for this transport group; Agent2 sees the status **Declined**.

Leaving shared transport




To leave shared transport:

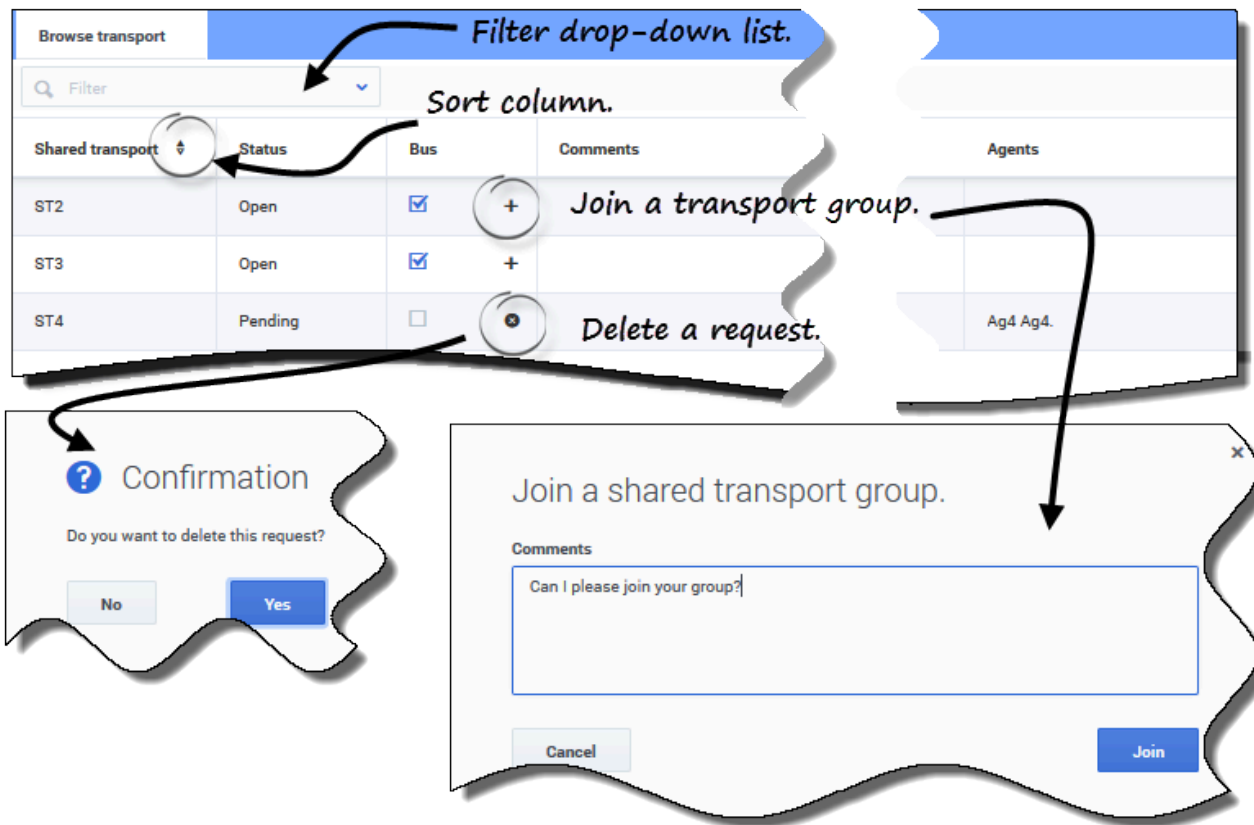
-
1. In the My Shared Transport view, click **Leave transport**.
A Confirmation dialog box opens.
 2. Click **Yes** to leave the group or **No** to cancel this action and stay in the group.

Browsing shared transport

Use the **Browse Shared Transport** view to browse existing shared transport in a table format with these columns and fields:

- **Filter by**—Select Shared Transport Name, Agent's First Name, or Agent's Last Name from this drop-down menu. You can also enter search criteria in this field. Leave this field empty to show all shared transport.
- **Shared transport**—The name of the shared transport. Use the **Sort** controls  to sort this column in ascending or descending order.
- **Status**—The shared transport status (open or closed). An open status indicates that this shared transport is open for new requests. A closed status indicates that it is closed to new requests.
The Status column also contains the status of the agent's join request (confirmed, pending, or declined).
- **Bus**—When selected, the check boxes in this column specify a bus as the mode of transportation provided by company. (Agents are driven to work by company bus.) Only supervisors can create groups with Bus checked. When unchecked, it means a carpool (created by the agents) is the mode of transportation
- **Actions**—Clicking the icons in this column enables you to join shared transport, leave it, or delete your request to join.
- **Comments**—View comments in this column that are associated with the shared transport.
- **Agents**—This column contains a list of the participants in the shared transport.

Joining shared transport



You can create join requests in the **Browse Transport** view.

To join shared transport:

1. In the **Actions** column, click the **Join** icon in the appropriate row.
A Join shared transport dialog opens.
2. In the **Comments** field, enter any comments related to this join request.
3. Click the **Join** button (or click **Cancel** to cancel the action).
The status of this shared transport changes to Pending.

Deleting Join requests

You can delete join requests in the **Browse Transport** view.

To delete join requests (see the figure in Requesting to join shared transport):

1. In the **Actions** column, click the **Delete** icon in the appropriate row.
A Confirmation dialog opens.
2. Click **Yes** to confirm the deletion or **No** to cancel the action.

You can leave your current shared transport by clicking [Leave transport](#). If you are the only participant and the shared transport is not a bus, it is removed from the table and you are no longer a participant. If the shared transport has other participants it is not removed from the table.