Workforce Management Web for Supervisors (Classic) Help

Editing Schedule Items

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Contents

When modifying individual agent's schedules, use various WFM wizards and dialogs to edit schedule items.

Related documentation:

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Editing items

Use the **Edit Item** dialog to edit the start time, and the end time or duration, of an agent's schedule item.

1. In the Intra-Day or Agent-Extended grid, right-click an agent's shift or shift item.
    To edit the shift itself, right-click anywhere in the shift. To edit a shift item (activity set, time off, marked time, break, or meal), right-click that item. See Editing exceptions if you are editing an exception.

2. From the shortcut menu that appears, click or hover over **Edit** to display the **Edit** submenu.

3. From the submenu, select the item that you want to edit.
    The submenu always includes the **Shift** option. If it omits the shift item that you intended to edit, press **Esc** to close the shortcut menu, and then right-click again directly inside that shift item.

4. Adjust the **Start time** and **End time**, if you want to.
    Select **Next Day** next to the **Start Time** and **End Time** text boxes if the shift item starts on the day after the agent's shifts begin. Or select **Next Day** next to the **End Time** text box if the shift item begins on the same day as the agent's shifts begin, but ends on the day after.

5. If you are editing a shift, you can select **Move Schedule Items With Shift**.

    • If you select this check box, you cannot directly edit the shift's end time. WFM Web calculates the end time based on the start time that you enter. It moves the whole shift and all shift items, except for meals and exceptions.

    • If you leave this check box cleared, you can specify the shift's start and end time.

    • The **Move Schedule Items With Shift** option appears only when you edit a shift.

6. Click **OK** to save your changes.

The dialog box closes if the edit is successful. The grid reflects your edits to this schedule item, and adjacent activity sets may automatically expand or contract to maintain a continuous schedule.

A **Warning** message appears if the edit violates time constraints for the shift or any shift item. For example, WFM Web attempts to maintain the distribution of breaks and activity sets within shifts, and it never moves meals or exceptions along with shifts. Also, meals cannot occur outside shift hours.

Editing exceptions

Open the **Edit Exception** dialog to edit exceptions on the **Schedule Intra-day** or **Agent-Extended** view.

1. In the Intra-day or Agent-Extended grid, right-click the exception that you want to change.

2. From the shortcut menu that appears, click or hover over **Edit** to display the **Edit** submenu.
   See Editing part-day exceptions and Editing full-day exceptions.

3. From the submenu, select **Exception**.
   You can either edit the parameters of the current exception or replace it with a new one from the exception list in the Edit Exception dialog box.

Part-day exceptions

To edit part-day exceptions:

1. If you are replacing the current exception with another one, select it from the list (only valid part-day and full-day exceptions are listed).

   • If it is a part-day exception, set **Start** and **End times**.

   • If it is full-day exception, use the next algorithm **To edit full-day exceptions**.

   • If the exception starts on the day after the agent's shifts begins, select **Next Day** beside the **Start time** and **End time** text boxes.

   • If the exception begins on the same day as the agent's shifts begins, but ends on the day after, select **Next Day** beside the **End time** text box.

2. Click **OK** to save your changes or **Cancel** to discard them.

Full-day exceptions

To edit full-day exceptions:

1. If you are replacing the current exception with another one, select it from the list (only valid full-day exceptions are listed).

2. Optional: To set start and end times for full-day exceptions, select the **Specify Start/End** check box and enter the value.
   If the exception ends on the day after its beginning, select **Next Day** next to the **End Time** text box.

3. Optional: If full-day exception is paid, select the **Specify Paid Hours** check box and enter a duration other than the default number of hours in a work day.

> ### Tip
> If you select the **Specify Paid Hours** check box, the **Paid Hours** text box becomes editable. If you enter a start/end time but do *not* enter a value for **Paid Hours**, then **Paid Hours** equals **End time** minus **Start time** (a value known as *Total Hours* or *Duration*).

4. Click **OK** to save your changes or **Cancel** to discard them.
    The edited exception is displayed.

Editing full-day time off

Open the **Edit Full-Day Time Off** dialog to edit full-day time-off items in the
Schedule Intra-Day or **Agent-Extended** view.

> **Tip**
> Use the edit item dialog to edit part-day time off.

To edit full-day time-off items:

1. In the Intra-day or Agent-Extended grid, right-click the full-day time off that you want to change.

2. From the shortcut menu that appears, select **Edit Full-Day Time Off**.

3. Edit the parameters of the current time off or replace it with a new one from the time off list in the **Edit Full-Day Time Off** dialog box.
    Only valid time-off items that are assigned to agent are shown in the list.

4. Check **Show All** to show all of the time-off items assigned to the site.

5. If you are replacing the current time off with another one, select it from the list.

6. Optional: Select the **Specify Start/End** check box and enter or select the correct times in the **Start time** and **End time** text boxes.

    > **Tip**
    > If the time off ends on the day after its beginning, select **Next Day** next to the **End Time** text box.

7. Optional: If the **Full-Day Time Off** is paid, select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a work day.

    > **Tip**
    > If you select the **Specify Paid Hours** check box, the **Paid Hours** text box becomes editable. If you enter a start/end time but do *not* enter a value for **Paid Hours**, then **Paid Hours** equals **End time** minus **Start time** (a value known as *Total Hours* or *Duration*).

8. Click **OK** to save your changes or **Cancel** to discard them.
    The view displays, showing the edited time off.

Editing activities

1. In the Intra-Day or Agent-Extended view, right-click an agent's **shift** or **activity set**. (The agent's schedule must already contain a shift with or without an activity set.)

2. From the shortcut menu that appears, select **Set Activities For**.

3. From the submenu, select the activity set that you want to modify.

   - If right-clicking on dark blue activity work inside a shift, the submenu allows you to select **Work** (you can change the color with the Colors tool).

   - If right-clicking on a yellow activity set, the submenu also allows you to select **Activity Set** (you can change the color with the Colors tool).

   - If a work set exists, the submenu also allows you to select **Work Set**, which starts the Insert Work Set Wizard.

   Depending on your selection from this submenu, you will either edit the work activities or the activities inside the Activity Set.
   The Set Activities dialog opens. Its grid shows all activities that belong to the selected work or activity set. (If necessary, a vertical scroll bar appears to the right.)
   In the first column, a check mark indicates activities that have already been assigned.

4. Add or remove activities.

   - Select a check box to add an activity.

   - Clear a check box to remove an activity.

   - You can add multiple activities within any one activity set.

5. Click **OK** to save your changes.

   - **If your changes violate no constraints, the dialog box closes and the view reappears.**

   - **If your changes would delete an activity set's last remaining activity, an error message appears. Use the Delete command to delete the activity set itself.**

   - **If your changes violate any constraints (for example, keeping too few activities to fill the activity set's hours of operation), a warning message informs you of the problem.**

Copying an agent's schedule

When modifying individual agents' schedules, you might want to copy the schedule to another date range. The **Copy Schedule** dialog appears when you right-click an agent schedule and select Copy Schedule from the shortcut menu in:

- Scenario Agent Extended view
- Master Schedule Agent-Extended view

Text at the top of this dialog box contains the date to be copied:
Copying schedule of *agent_name* from date to:

To specify the copy-to date range:

1. Click the date selector for **Start date** and enter or select the start date for the copy-to range.

2. Click the date selector for **End date** and enter or select the end date for the copy-to range.

3. Click **OK**.
   If the copy operation does not violate the agent's schedule constraints (maximum selection of six weeks, and the Start and End dates must fall within the target schedule's date range for the Master Schedule or schedule scenario), WFM copies the selected schedule day from the Start date to the End date. If the operation does violate schedule constraints, the Review Messages dialog box opens.

4. Under **Action**, keep **Save** or click the down arrow and select **Do Not Save** from the drop-down menu.

5. When finished in this dialog, click **OK**

Viewing changes in Schedule History

Use this window to compare the current schedule with its previous state, and optionally to restore the schedule to that same previous state (rollback).

> ### Tip
> The rollback function—and all **Schedule History** functionality—applies only to the **Master Schedule**.

1. In the Intra-Day grid, right-click an agent's row.

2. From the shortcut menu that appears, select **Schedule History...**.
   The Schedule History window opens.
   The top half of the window displays a grid listing all changes made to the schedule, with each change on a single line. The columns for each line are

   - **Date of Change**

   - **User** (who made the change)

   - **Action** (type of change performed)

   - **Historical Schedule** (a horizontal bar graphic that represents the hours of the shift containing those changes).

   The bottom half displays the agent's current (post-change) schedule on the left and the agent's historical (pre-change) on the right. As you use the cursor to select each listed change in the top half of the window, WFM highlights the elements that changed on both sides of the bottom half. Thus, you can compare each change with the original state and decide if you want to restore the schedule to its original state before that particular change.

3. When you have selected the change you wish to restore, click **Restore** at the bottom of the window.