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Workforce Management Web for Supervisors (Classic) Help

Inserting Schedule Items

Contents

- 1 Inserting shifts
- 2 Inserting breaks and meals
- 3 Inserting activity sets
- 4 Inserting exceptions
 - 4.1 Part-day exceptions
 - 4.2 Full-day exceptions
- 5 Inserting exceptions with payback
 - 5.1 About payback exceptions
 - 5.2 After inserting payback exceptions
- 6 Inserting time off
 - 6.1 Part-day time off
 - 6.2 Full-day time off
- 7 Inserting work sets
 - 7.1 How WFM processes overtime work sets
 - 7.2 Use Case: Applying secondary shifts to overtime work sets
- 8 Inserting marked time

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

Related documentation:

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Inserting shifts

Use the **Insert Shift Wizard** to insert a shift into an agent's schedule:

1. In the Intra-Day or Agent-Extended grid, right-click an agent's row.
2. Click any timestep for any agent who does not have a scheduled shift.
3. From the shortcut menu that appears, select **Insert Shift**.
The first of the **Insert Shift Wizard's** two screens, **Select Shift** opens.
4. In the **Select Shift** list, click a shift row to select it.
The list shows the name and hours of each shift that was configured in the WFM Web. If necessary, a vertical scroll bar appears to the right.
5. Adjust the shift's **Start time** and **End time**, as necessary.
 - Select **Next Day** if the **End time** is on the day after the **Start time**. Your settings must match the shift type's configured time constraints.
 - Select **Automatically Insert Meals and Breaks** to have meals and breaks automatically inserted along with the shift and optimized, based on schedule coverage, according to the constraints configured for this **Shift** in Web. If this option is unchecked, then the **Shift** will be inserted with no meals and breaks, and those can be inserted manually.
 - Select the check box **Show activities matching secondary skills** to specify that activities which match the secondary skill of this agent.
6. Click **Next**.
7. On the **Select Activity Set** screen, you can select:
 - one or more work activities
 - an activity set
 - one or more activities associated with an activity set.
8. If you are inserting a shift for an agent that can work on multiple activities, you can select multiple activities.

Important

The shift hours that you selected on the previous screen must be consistent with the activity set's configured time constraints. (Click **Back** if you need to change the shift's start or end times.)

9. Click **Finish** to insert the selected work activities or activity sets and close the wizard.

Important

No warnings are displayed if the shift contains incorrectly configured shift items that cannot be inserted.

The view reappears. The new shift appears as a dark-blue bar (you can change the color with the Colors tool).

Inserting breaks and meals

Use the **Insert Break** dialog to insert breaks into an agent's schedule. Use the or **Insert Meal** dialog to insert meals into an agent's schedule. The procedure is similar for both tasks.

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors tool).
Click at or near the timestep where you want the break or meal to begin.
2. From the shortcut menu that appears, select **Insert > Break** or **Insert > Meal**
The dialog opens, showing the breaks or meals that are associated with the selected shift.

Click **Show all** if you prefer to display all of the breaks or meals that are configured for your site.
3. In the **Choose Item to Insert** list, click a break or meal row to select it.
The list's first two columns show each break's or meal's full and short name.

The **Hours** column shows the break's or meal's configured duration in hours and minutes.

A check mark in the **Paid** column indicates that the break or meal time is paid. (You cannot select or clear check boxes to change this attribute here.)
4. Adjust the **Start time** and **End time**, as necessary.
You can select **Next Day** for **End time** only or both **Start** and **End time** if either of them is on the next day. (You cannot select **Next Day** for **Start time** only.)
5. Click **OK** and close the dialog.
The view reappears. The new break or meal appears as a light-gray bar.

Important

When you insert a meal using the **Insert Meal** dialog, the schedule does not take into account the agent's qualification for the meal.

Inserting activity sets

Use the **Insert Activity Set** dialog box to insert an activity set into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors tool).
2. Click at or near the timestep where you want the activity set to begin.
From shortcut menu that appears, select **Insert > Activity Set**.

The **Insert Activity Set** dialog box opens.

3. Select an activity set, or one or more of its associated activities.
In the **Choose Item to Insert** tree, you can expand activity sets to display their activities. You can select a whole activity set, or one or more activities within any one activity set.
4. Adjust the **Activity Set** or selected activity **Start time** and **End times**, as necessary.
You can select **Next Day** for **Start time** or **End time** if either of them is on the next day.

Important

Your settings must match the activity set's configured time constraints.

5. Click **OK** to insert the selected activity set and close the dialog box.
The view reappears.

Activity Sets appear as yellow bars (you can change the color with the Colors tool).

Inserting exceptions

WFM uses different dialog boxes and menu items for part-day and full-day exceptions:

- Use the **Insert Exception** dialog to insert a part-day exception into an agent's schedule.
- Use the **Insert Full-Day Exception** dialog to insert a full-day exception into an agent's schedule.

For example, you might need to schedule a full-day meeting or a one-hour appointment after the schedule was created.

Part-day exceptions

To insert a part-day exception:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors tool).
2. Click at or near the where you want the exception to begin.
3. From the shortcut menu that appears, select **Insert > Exception**.

The Insert Exception dialog box opens. The agent's name appears in the title bar. You can add memos to Exceptions that then appear in some Schedule views and reports.

- In the grid, click an exception row.
The grid shows the part-day exception types that are configured in the Policies module of WFM Web for Supervisors. If necessary, a vertical scroll bar appears to the right. The first two columns show each exception's full and short name. Check marks in the remaining columns indicate whether the exception is paid, whether it is convertible to a day off, and whether it counts as time off. You cannot select or clear check boxes to change these attributes here. The column Site lists all sites to which the exception is assigned.
- Adjust the **Start time** and **End time** for this exception.
 - Select **Next Day** next to the **Start Time** and **End Time** text boxes if the exception starts on the day after the agent's shifts begin.
 - Or select **Next Day** next to the **End Time** text box if the exception begins on the same day as the agent's shifts begin, but ends on the day after.
- Click **OK** to insert the selected exception and close the dialog box.
The view reappears. The new exception appears as a red bar (you can change the color with the Colors tool).

Important

If the Start and End times would place the exception outside the agent's shift hours, a warning message appears. If an agent's activities are all scheduled in activity sets, and you assign a long exception, the exception may be the only schedule state group available during the agent's paid hours.

Full-day exceptions

To insert a full-day exception:

- In the **Intra-Day** or **Agent-Extended** grid, right-click an agent's row.
- From the shortcut menu that appears, select **Insert > Full-Day Exception**.
The **Insert Full-Day Exception** dialog box opens. The agent's name appears in the title bar.
- Click an exception row.
The list shows the full-day exception types that were configured in the **Policies** module of WFM Web for Supervisors. If necessary, a vertical scroll bar appears to the right. The first two columns show each exception's full and short name.
Check marks in the remaining columns indicate whether the exception is paid, whether it is convertible to a day off, and whether it counts as time off. You cannot select or clear check boxes to change these attributes here.
The column **Site** lists all sites to which the exception is assigned.
- In the **Specify Start/End** section, you can optionally adjust the exception's **Start time** and **End time** as necessary.
 - If the exception begins on the same day as the agent's shift begins, but ends on the day after, select **Next Day** next to the **End Time** text box.

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- If you selected a paid exception, you can select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a work day.
 - If you select the **Specify Paid Hours** check box, the **Paid Hours** check box becomes enabled.

Important

If you enter a start/end time but do not enter a value for **Paid Hours**, then **Paid Hours** will equal **End Time** minus **Start Time** (a value known as **Total Hours or Duration**).

5. Click **OK** to insert the selected exception and close the dialog box. The view reappears. The new exception shows as a red bar.

Inserting exceptions with payback

Use the **Insert Payback Exception Wizard** in the **Schedule > Intra-Day** view to add unpaid, part-day exceptions to agents' schedules to make up for or pay back time lost due to lateness or a personal appointment.

To enter payback exceptions:

1. In the Intra-Day grid, right-click a shift in an agent's row.
2. From the shortcut menu that opens, select **Insert > Exception with payback...**
The Insert Payback Exception Wizard opens.
3. **Select Exception:**
 - a. Select an exception in the list.
 - b. Set a new **Start time** and **End time** to cover the time missed, checking **Next Day**, if applicable.
The **Enter payback** check box is checked by default.
 - c. In the **Memo** field, add comments or additional information about this exception.
 - d. Click **Next**.
4. **Select Marked Time:**
 - a. Select a Marked Time of type Payback from the list.
 - b. Click the **Calendar** to select the date for this payback.
 - c. Click **Next**.
5. **Select Payback Parameters:**
 - a. Add work to the shift or meal, by changing one or more of the following parameters. If you change more than one, the total time must equal the payback period for this exception:
 - The **New start** time for the shift
 - The **New end** time for the shift

-
- The **New start** time for the meal
 - The **New end** time for the meal

6. Click **Finish**.

About payback exceptions

Keep these things in mind when inserting payback exceptions:

- You can insert payback intervals into schedules for:
 - For the current date, to the end of a shift and/or over meals by decreasing meal duration.
 - For future dates, to the beginning of a shift, end of a shift, and/or over meals by decreasing meal duration.
To decrease the meal duration, edit start/end time by setting start time later and/or the end time earlier.
- You can specify multiple intervals of payback for a single day, but all intervals must be within the same shift. If the payback starts before the shift start time, you must specify a new start time for the shift. The payback interval is the time between the new and previous shift start time.
- If you add an exception over unpaid time, you must estimate the amount of time for payback, because it might not be the entire duration of the exception.
- When reviewing schedule validation warnings related to payback exceptions, you can save or cancel the changes.

After inserting payback exceptions

WFM reschedules shift items as follows:

- WFM leaves unpaid shift items as they are (same duration, same place in the schedule).
- If a shift change occurs and additional shift items are required, WFM schedules them. For example, if the shift duration increases, then additional breaks could be added to the schedule.

If an existing shift does not have a shift item sequence that matches the modified schedule, WFM selects other shifts with shift item sequences that "fit better". If WFM cannot find a shift item sequence that "fits", it leaves the existing or current schedule as is.

Inserting time off

WFM uses different dialog boxes and menu items for part-day and full-day time-off schedule items:

- Use the **Insert Time Off** dialog to insert part-day time off into an agent's schedule.
- Use the **Insert Full-Day Time Off** dialog to insert full-day time off into an agent's schedule.

For example, an agent might be called to jury duty or need to be out sick after the schedule is created.

Part-day time off

To insert a part-day time-off item into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors tool).
2. Click at or near the timestep where you want the time off to begin.
3. From the shortcut menu that appears, select **Insert > Time Off**.
The **Insert Time Off** dialog box opens and the agent's name appears in the title bar.
4. In the list of time-off types, click the row for the time-off type that you want to insert.
 - Select the **Show all** check box to display all time-off types. Clear the check box to display only the time-off types that are applicable to the selected agent. See the "Time-Off Primer" appendix in the *Workforce Management Administrator's Guide*.

Important

The list shows time-off types that were configured in the **Policies** module of WFM Web for Supervisors. If necessary, a vertical scroll bar appears to the right.

If you select a time-off type that is not associated with a selected agent, WFM assigns the time-off item but does not enforce the time-off balance rules. However, if the time-off type counts toward time-off limits, WFM takes this time-off item into account when calculating limits.

The first two columns show each time-off type's full and short name.

Check marks in the remaining columns indicate whether the time-off item is paid and whether it counts toward time-off limits. You cannot select or clear check boxes to change these attributes here.

The **Site** column lists all sites to which the time-off type is assigned.

5. Optional: Adjust the **Start Time** and **End Time** for this time off, if the default values are not correct.
 - a. Click inside the **Start Time** and **End Time** fields, to modify the default values for hours, minutes, and AM/PM.
 - b. Select **Next Day** to the right of the **Start Time** text box if the time-off period starts on the day after the agent's shifts begin.
 - c. Select **Next Day** to the right of the **End Time** text box if the time-off period ends on the day after it begins.
4. Click **OK** to insert the selected time-off item and close the dialog box.
The view reappears and the new time-off item appears as a dark-green bar (you can change the color with the Colors tool).

Important

If the **Start** and **End time** would place the time off outside the agent's shift hours, a warning message appears. If an agent's activities are all scheduled in activity sets, and you assign a long time off, the time off may be the only schedule state group available during the agent's paid hours.

Full-day time off

To insert a full-day time-off item into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** grid, right-click an agent's row.
2. From the shortcut menu that appears, select **Insert > Full-Day Time Off**.
The **Insert Full-Day Time Off** dialog box opens. The agent's name appears in the title bar.
3. In the list of time-off types, click the row for the time-off type that you want to insert.
See the important note in Part-day time off
4. Optional: Adjust the **Start time** and **End time** for this time-off item, if the default values are not correct.
 - a. Select the check box **Specify Start/End** to enable the **Start Time** and **End Time** fields, then click inside each field to modify the default values for hours, minutes, and AM/PM.
 - b. Select **Next Day** to the right of the **End Time** text box if the time-off period ends on the day after it begins.
3. Optional: Specify a nonstandard length for your full-day time-off item.
 - Select the **Specify Paid Hours** check box to enable the **Paid Hours** field, then click inside and enter or select a value to specify the exact number of hours in a full day for this particular time-off item. The **Specify Paid Hours** check box is enabled only if you selected a paid time-off type in the **Choose Time Off** list.
4. Click **OK** to insert the selected time-off item and close the dialog box.
The view reappears. The new full-day time-off item appears as a dark-green bar (you can change the color with the Colors tool).

Inserting work sets

Use the **Insert Work Set Wizard** to insert a work set into an agent's schedule.

1. In the Intra-Day or Agent-Extended grid, right-click an agent's row.
2. From the shortcut menu that appears, select **Insert Work Set**.
3. In the wizard's **Specify Work Set Parameters** screen:
 1. Adjust the **Start time** and **End time**, as necessary.
Select Next Day (next to the Start Time text box and next to the End Time text box) if the work set starts and ends on the day after the agent's shifts begin.
— OR —
Select Next Day (next to the End Time text box only) if the work set begins on the same day as the agent's shifts begin, but ends on the day after.
 2. Select one of the following two radio buttons:
 - **Select new activities for work set** (default) enables the wizard to display the **Select activities for work set** screen.
 - **Use existing shift activities** disables that screen.
 3. Select the check box **Mark as overtime with marked time** (default) to enable the wizard to

display the **Select Marked Time for Overtime** screen. Clear this check box to disable that screen.

4. Click **Next**
The Select activities for work set screen opens, if you enabled it previously.
4. Select from the list of activities (ones that the agent could work, based on his/her primary and secondary skills):
 - One or more work activities
 - An activity set
 - One or more activities that are associated with an activity set; If you are inserting a work set for an agent who can work on multiple activities, you can select multiple activities.
The work set hours that you selected on the previous screen must be consistent with the activity set's configured time constraints. (Click Back if you need to change the work set's start or end time.)
5. Click **Next** (or **Finish**, if this is the final screen).
The Select marked time for overtime screen opens, if you enabled it previously.
6. Select an item from this list.
The list displays only items that have Used To Mark Overtime enabled and thus may be empty.
7. Click **Finish** to insert the selected work sets and close the wizard.

How WFM processes overtime work sets

The process described here applies only to work sets that are inserted as overtime (as Marked Time). For work sets that are not inserted as Marked Time, WFM simply replaces the shift activities with new activities, as specified in the work set. WFM does no additional checks or rescheduling.

WFM's automated overtime insertion process:

1. Finds the appropriate shift definition for the extended shift.
2. Schedules break/meals on the inserted overtime part of the shift.
3. Designates the overtime by specifying a Marked Time.

WFM checks all of the shifts that agent can potentially work in the following order:

1. The currently scheduled shift
2. Primary shifts, other than the currently scheduled shift
3. Secondary shifts

If WFM does not find an acceptable shift, it keeps the current shift, which might now be invalid (if paid time is too long, start or end time is out of bounds, etc.).

WFM also checks the following shift parameters:

- Are the shift start time, end time, and paid time correct?—If any one of these parameters are unacceptable, WFM does not use the shift (for example, if shift starts at 9:00 am and the inserted work set is from 8:00 am to 9:00 am).
- Are the shift's breaks and meals compatible with the currently scheduled breaks and meals?—WFM

check the order, duration, paid/unpaid status, and start/end time of meals. Meaning that if one shift has a 10-minute paid break, then it is considered equivalent to a 10-minute paid break in another shift.

When matching shift items sequences, WFM checks:

- From the left to right if the work set is inserted at the end of the shift.
- From right to left if the work set is inserted at the beginning of the shift.

Use Case: Applying secondary shifts to overtime work sets

This use case describes how WFM processes overtime work sets when added at the beginning of the shift and when added at the end of the shift:

Shift 05—Original shift:

- Shift starts at 8:00 am ends at 4:30 pm:
- The paid duration is 8 hours (valid duration 8:00-9:45), and unpaid break = 30 minutes.
- Scheduled breaks are: 15-minutes paid, 30-minutes unpaid, 15-minutes paid.

Adding Work Sets to End of Shifts

When a work set is added to the end of **Shift 05** we have the following configuration:

- Shift starts at 8:00 am ends at 7:00 pm
- The paid duration is 10 hours and 30 minutes.
- WFM considers this shift invalid.

Shift 96—No match for **Shift 05**

- Start, end and paid time are OK but breaks do not match as this shift has one unpaid 60 minute break.

Shift 95—Match for **Shift 05**

- Start, end and paid time are OK
- Breaks for this shift duration are 15 minutes paid (match), 30 minutes unpaid (match), 15 minutes paid (match) and 10 minutes paid (no match but this new break can be scheduled in added workset).

Adding Work Sets to Beginning of Shifts

When a work set is added to the beginning of **Shift 05** we have the following configuration:

- Shift starts at 5:30 am and ends at 4:30 am.
- The paid duration is 10 hours and 30 minutes.

Shift 96—No match for **Shift 05**

- Start, end and paid time are OK but breaks do not match as this shift has one unpaid 60 minute break.

Shift 95—No match for Shift 05

- Start, end, and paid time are OK
- Paid breaks are also mandatory so the new shift MUST have all breaks of the original **Shift 05**.
- As work set is added in the beginning WFM looks at breaks from the right (or the end of the sequence).
- Break comparison fails at the last 10-minute paid break. It is present in **Shift 95** but it does not exist in **Shift 05**. If paid breaks were not mandatory, then **Shift 95** might be used.

Since none of the shifts match WFM keeps the original **Shift 05**, as is.

Inserting marked time

Marked Time enables you to mark part or all of an agent's shift to track how that time is being spent by the agent. For example, you may want to mark extra time that an agent is working at the end of the day. You can see this marked time on the schedule, and you can run several reports to track how different types of marked time are used within the schedules.

Use the **Insert Marked Time** dialog box to insert marked time into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, right-click an agent's dark-blue shift bar (you can change the color with the Colors tool).
Click near the timestep where you want the marked time to begin. You can also click a timestep outside of the shift. If you click a timestep before the shift's current start time, you will be able to both extend the shift start time and insert the marked time between the new earlier start time, and the current start time, in one step. If you click a timestep after the shift's current end time, you will be able to both extend the shift end time and insert the marked time between the current end time and the new later end time, in one step.
2. From the shortcut menu that appears, select **Insert > Marked Time**.
The Insert Marked Time dialog box opens. It shows the marked-time types that are configured for the selected site. For each marked-time instance, the display shows its long name, short name, and whether it is designated for overtime.
3. In the list of marked-time types, click the row for the type that you want to insert.
The list shows each marked-time type's full and short name.
4. Adjust the **Start time** and **End time**, as necessary.
Select Next Day next to the Start Time and End Time text boxes if the marked time starts on the day after the agent's shifts begin. Or select Next Day next to the End Time text box if the marked time begins on the same day as the agent's shifts begin, but ends on the day after.
5. Click **OK** to insert the marked time and close the dialog box.
The view reappears. The new marked time appears in orange (you can change the color with the Colors tool).

Important

If the marked-time period that you selected overlaps any time off, WFM Web

generates an error message, and the marked time is not inserted.

For an explanation of how to display marked time, see [Master Schedule Intra-Day View](#) or [Schedule Scenario Intra-Day View](#).