Workforce Management Web for Supervisors (Classic) Help

Master Schedule Intra-Day: Accessibility and Dialogs

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Contents

Make it easy for impaired users to select commands, and customize settings in the Master Schedule Intra-Day view dialogs.

Related documentation:

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Accessible schedule details

To reach this view, you clicked the wheelchair icon in a specific agent's row, for a specific date, in any of the following four views:

- Scenario Agent-Extended
- Scenario Intra-Day
- Master Schedule Intra-Day
- Master Schedule Agent-Extended

This view is designed specifically for screen-reader software, and for ease of selecting commands. It includes:

- Read-only information about the selected agent's team, time, and other statuses.
- A table that lists in each row: one item in the schedule and multiple buttons to modify it.
- A field for comments by users.
- Buttons for inserting items into the selected day on the selected agent's schedule—also for deleting items, and for performing other functions.

Click a button to display the dialog box or the wizard which corresponds to that action.

If you select any action or command in error, click the **Cancel** button on the unwanted dialog box, to return to the **Accessible Schedule Details** screen.

Performance data target

To view performance data in the **Master Schedule Intra-Day** view or the **Schedule Scenario Intra-Day** view, you must choose a target. The target is the source of the performance data. You can select the Enterprise, a business unit, a site, an activity group, or an activity (either multi-site or single-site).

To change the **Select Target** window:

- Click the **Target:** button on the **Schedule Intra-Day** view window [Target: SFO] .

> ### Important
> This option is available only if you have chosen to view performance data by selecting the **Show Performance Information** check box on the **Performance** tab of the Options dialog.

Selecting the appropriate time zone

When you select a site on the **Object** pane (for example, San Francisco), you are also specifying that site's time zone, which may differ from the data source's time zone. You can change the time zone manually by selecting the appropriate zone from the **Time Zone** drop-down list near the upper right of the **Intra-Day** view. The selected time zone is applied to the grid and graphs that you view when you request performance data. Schedules and whatever you select to view would be displayed in the selected time zone, regardless of the data source's local hours (WFM makes the appropriate time conversion).

Viewing multi-site activity data

Select the **Use Multi-site Activities** check box to display forecast data that is taken from multi-site activities (MSAs), and schedule data that is the sum/average of **Activities** under your selected target (MSA, business unit, or site). All data is transposed to the time zone of the site that you selected on the **Object** pane.

Clear the **Use Multi-site Activities** check box to display all MSA data as a sum/average. All data is transposed to the selected site's time zone.

If you set the **Use Multi-site Activities** button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Options dialog

Use the **Options** dialog to configure the data that is shown on the:

- Intra-Day view or Agent Extended view for the current scenario.
- Master Schedule Intra-Day or Master Schedule Agent-Extended view.

Opening the Options dialog

To open the **Options** dialog:

1. Click **Options** on the **Actions** toolbar, or select **Options...** from the **Actions** menu. The **Option**s dialog opens.

    - When called from an **Intra-Day** view, it has three tabs: **Options**, **Performance**, and **Columns**.

    - When called from an **Agent-Extended** view, it has two tabs: **Options** and **Columns**.
      Each tab is described below.

2. After you are done configuring the **Options** dialog box, click **OK** to save your changes, or **Cancel** to restore the original selections.

The **Options** dialog box closes and the view refreshes. The settings that you configure for a scenario or the **Master Schedule** appear whenever you return to the view for that scenario or for the **Master Schedule**, until you log off.

Configuring the Options

To configure options in this dialog box:

1. If you do not need the **Legend** to appear, you can clear the **Show Schedule Legend** check box to provide more space for the grid.

2. If you want to see agent availability on the grid, select the **Show Agent Availability** check box. Hours when an agent is unavailable are then shown in light gray on the grid.

3. Select the check box **Show agents with granted and scheduled rotating pattern** or any other calendar preference to see which schedule days contain such an item. The result: a red check box and **Agent** icon appears in the left-most column (labeled "!") for every **Agent** who meets these conditions.

> ### Tip
> You can use this tool to learn whether an agent was given a schedule based on a schedule preference, which might influence your decision to modify this agent's schedule. This icon is displayed only if the agent was given a rotating pattern or preference (such as for time off) as a result of building a schedule. If an agent's schedule is manually edited to give him or her a preference, or a schedule from a rotating pattern, then the icon will not be displayed.

4. Select the radio button for the hours you want to show, **24** to show 24 hours or **36** to show 36 hours.

5. Select the **Presentation** type: **Schedule only**, **Schedule on top**, or **Marked time on top**. Your selection affects the colored bars in the schedule. If **Schedule only** is selected, you cannot see **Marked time**.

Configuring performance

To configure the **Performance** tab (not available in **Agent-Extended** view):

1. If you select the Show Performance Information check box, you can further customize exactly what performance information WFM Web shows on the **Intra-Day Schedule** view. If you clear this check box, the rest of the options on this tab are disabled.

2. If you prefer not to see the legend that explains the colors used to distinguish performance data, clear the **Show Performance Legend** check box.

3. The **Update Automatically** check box determines whether schedule changes are shown when they happen.

    Clear this only if you have network bandwidth issues that make automatic updates a problem.

4. If you selected to view performance data, you can select the check boxes to show additional information in the performance table.

> **Tip**
> You see the table *only* if the **Full-Day View** check box is not selected.

In addition to scheduled coverage and calculated staffing, which always appear, you can select any or all of these **Show additional data** options to appear in the table:

- Required Staffing
- Difference between Coverage and Calculated Staffing
- Difference between Coverage and Required Staffing
- Scheduled Service Level Percentage
- Scheduled Deferred Service Level Percentage
- Scheduled ASA **(Average Speed of Answer)**
- Overtime Schedule (default: cleared)
- Overtime Requirement (default: cleared)

> **Important**
> If any of the cells in the **Difference in Calculated Staffing** or **Difference in Required Staffing** columns show as understaffed, WFM alerts the user by changing the color of the cell to red. Although red is the default color, you can change it, by using the settings in **About > Settings** (in the upper-right corner of the GUI).

Showing and hiding columns

To configure the **Columns** tab:

- Select the check boxes for the optional columns that you want to display. Clear the check boxes for any columns that you want to hide. For **Intra-Day** and **Agent-Extended** views, you can add the following columns: **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Accessibility**, and **Comments**. In **Intra-Day** view, all columns are sortable, except for **Comments**. In **Agent-Extended** view, these columns are not sortable.

Review messages (Save) dialog

Use this dialog to respond to any warnings or errors that the server returned during your last attempt to save an agent's edited schedule.

The dialog box includes the following columns and controls:

Team Name	Displays the team to which this agent belongs.
Agent Name	Displays the agent whose schedule generated this message.
Messages	Displays the message type (either **Warning** or **Error**), numeric code, and the message text.
Action	Use each message's drop-down list to select an action to resolve the warning or error: • **Save**—Saves the edited agent schedule. This is the default action for warnings. It is unavailable for agent schedules whose edits generated errors (which are more severe than warnings). • **Fix Later**—Does not attempt to save the agent schedule, but keeps it in the **Intra-Day** grid so that you can further modify it. This is the default action for agent schedules whose edits generated errors. • **Do Not Save**—Discards the change that caused the warning or error to be generated.
OK	Closes the dialog box, applies your selected actions, and retrieves fresh data from the server.
Close	Closes the dialog box without saving or refreshing data.

These errors and warnings are generated by schedule changes that you made manually in the **Intra-Day** view. They differ from **Validation** warnings and errors, which WFM Web generates during the schedule building process.