Workforce Management Web for Supervisors (Classic) Help

Modify Individual Agents' Schedules

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Contents

Insert and edit, and move schedule items for a particular agent.

Related documentation:
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Use the following views to modify schedules:

  • Master Schedule Agent Extended or Intra-Day view

  • Scenario Agent Extended or Intra-Day view

For example, you might want to reassign an agent from an overstaffed activity to an understaffed activity; or you might want to swap paid hours for a day off, due to a change in overall interaction volume.

You can insert and edit schedule items using shortcut menus. Once items are inserted, you can graphically move or resize certain items using your mouse.

Using shortcut menus

To display a shortcut menu:

  • Right-click an agent's grid row at the timestep where you want to insert or edit a schedule item. (To zoom in on a particular timestep, clear the **Full-Day** view check box and/or resize the columns.)

To close a shortcut menu without selecting any of its commands:

  • Press **Esc**.

Inserting full-day schedule items

Right-click an agent timestep that contains schedule items to bring up a shortcut menu. The menu items available for selection depend on the full-day items that already exist (or do not exist) in the agent's schedule day. The table below discusses all menu items.

Insert Day Off	Assigns the agent a day off, which appears as a light-green bar.
Insert Full-Day Time Off	Displays a window where you can select a full-day time-off type. Once inserted, the time off appears as a dark-green bar (you can change the color with the Colors tool).

Insert Full-Day Exception	Displays a window where you can select a full-day exception type. Once inserted, the exception appears as a red bar.
Insert Shift	Displays a window where you can select a shift type and start/end times. Once inserted, the shift appears as a dark-blue bar with thick black borders (you can change the color with the Colors tool).
Insert Marked Time	Displays the **Insert Marked Time** dialog box.
Undo Changes	Restores this agent's schedule to the state in which it was last saved.
Insert Multiple	Enables you to insert schedule items for multiple agents or teams.
Copy Schedule	This menu item appears in **Agent-Extended** view. You can select a single agent schedule day, and use this option to select the **Start** and **End dates** to which you want to copy the selected schedule day.

Modifying full-day exceptions, days off, and full-day time off

Once a full-day exception, day off, or a full-day time off is inserted, you cannot delete or move or resize its bar in the grid. However, you can replace it by inserting a different full-day item.

When you right-click an inserted full-day exception, day off, or full-day time off, the existing item (**Exception**, **Day Off**, or **Full-Day Time Off**) does not appear on the full-day shortcut menu, but the **Edit Exception** or Edit Full-Day Time Off options appear for Exception or Time Off in the pop-up menu. You can move or resize the Full-Day **Exception** or **Full-Day Time Off** if they were created with start/end time settings. See also Edit Exception Dialog Box and Inserting and Editing Shift Items.

Modifying shifts

After a shift is inserted, you cannot delete its bar in the grid; but you can replace the bar by inserting a different full-day item. When you right-click an inserted shift, you see the shift items shortcut menu.

To change the shift's start and/or end times, do one of the following:

- Use the shortcut menu's Edit command.
- Move or Resize the shift bar visually while holding down the **Ctrl** key.

> **Tip**
> If you change the shift start time or shift end time for an agent who belongs to a shared transport group, you will see a warning message when you save the change.

Inserting and editing shift items

Once an agent's schedule contains a shift (represented by a blue bar with thick black borders), you can insert and edit schedule items within that shift, or you can edit the shift itself.

- Right-click the shift to display a shortcut menu with the options listed below.

- When you move your mouse pointer over an option that ends with an arrow (**>**), a submenu displays further options.

Insert >	From the submenu, select Break, Meal, [part-day] Exception, [part-day] Time Off, Activity Set, Work Set, Marked Time, or Exception with payback.... Use the resulting dialog or wizard to insert schedule items.
Edit >	From the submenu, select the activity set, shift, or other schedule item that you want to edit. Use the resulting Edit dialog box to adjust the item's start and/or end times.
Set Activities For >	From the submenu, select **Work**, **Work Set**, or **Activity Set**. Use the resulting Set Activities dialog to define the agent's work activities. **Activity Sets** appear in the grid as yellow bars.
Delete >	From the submenu, select the activity set or other schedule item that you want to delete from the schedule. **Important** Select carefully, because there is no confirmation prompt before the item is deleted. If a shift has only one activity set, you cannot delete that activity set, so the **Delete** command does not appear when you right-click it.
Replace	When you right-click directly on an item (a meal, a break, a part-day or a full-day exception, a part-day or a full-day time off, or marked time) in an agent's schedule, the Replace command becomes visible and enabled in the drop-down menu. Use this command to replace the selected "old" item with another "new" item of the same type. Selecting **Replace > item...** from the menu activates the **Replace Multiple Wizard**. This wizard displays a series of selection screens (for example, **Select Activities** and **Select Agents**) that mimic similar screens in the Insert Multiple Wizard. Make your selection(s) on each of these screens and click **Next**. The final selection screen displays items of the same type as the item you are replacing. Select an item and click **Finish**. WFM replaces the "old" item with the "new" item, for all

	selected agents who have the same "old" item in their schedule on that day.
Commit	When you are working in the **Master Schedule** if the agent's schedule day has pending items, and you have the **Approve Changes** security permission enabled, you can select **Commit** to have all that day's pending changes included in the schedule. If you are working in a schedule scenario and the agent's schedule day has pending items, you can select **Commit** to have all that day's pending changes included in the schedule.
Rollback	If the agent's day has pending schedule items, you can select **Rollback** to remove all pending changes for the agent for that day.
Undo Changes	Restores this agent's schedule to the state in which it was last saved.
Insert Multiple	Enables you to insert schedule items for multiple agents or teams.
Schedule History	Use to compare the current master schedule with its previous state, and optionally restore the master schedule to that same previous state (rollback).

Tip

A warning message appears if your insertions or edits violate time constraints for the shift or for any shift item, including the timing and distribution of meals, breaks, and exceptions.

Moving and resizing shift items

Once an agent's schedule contains a shift, you can use your mouse to move (drag and drop) or resize some of the shift's schedule items (activity sets, breaks, meals, and part-day exceptions) or the shift itself.

Moving an item changes both its start and end times, but maintains its duration. Resizing an item changes its start or end time, which changes its duration.

Warning messages

A Warning message displays if your changes would create overlapping schedule items, or if they would violate time constraints for the shift or any shift item. Some examples of time constraints are:

- WFM Web never moves meals or part-day exceptions along with shifts; some meals or part-day exception, depending on their configuration, cannot occur outside shift hours.

- WFM Web never moves activity sets or work sets with 1-minute granularity, but treats these shift items as 15-minute granularity items and, if the 15-minute granularity constraint is violated, the following Warning message is displayed: *Constraint violation: Activity set times must match the start/end or 15-minute time steps.*

Moving a shift item

> **Tip**
>
> To move the shift itself, hold down the **Ctrl** key throughout the first two steps.

1. Click in the middle of the schedule item and hold down the mouse button.
   The mouse pointer changes to a four-pointed arrow.
2. Drag the item to the right or left.
3. Release the mouse button (and any keys) when the item has the start and end times that you want.
   A warning message informs you of any constraint violations.

Resizing a shift item

> **Tip**
>
> To resize the shift itself, hold down the **Ctrl** key throughout the first two steps.

1. Click near a schedule item's start or end point and hold down the mouse button.
   The mouse pointer changes to a two-pointed arrow. (If you see a four-pointed arrow, or if the point does not change at all, release the mouse button, and then click at the very edge of the item's colored bar.)
2. Drag the bar's start or end point to the right or left.
3. Release the mouse button when the item has the start or end time that you want.
   A warning message informs you of any constraint violations.

Committing or rolling back pending changes

To include all pending changes that are in an agent's schedule for the selected day, or to remove them all:

1. Right-click the agent's schedule row in the **Intra-Day** view.
2. Select **Commit** or **Rollback** from the shortcut menu.

> **Tip**
> If do not have the **Approve Changes** security permission enabled, you cannot select **Commit**.