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Workforce Management Web for Supervisors (Classic) Help

[Master Schedule Agent-Extended View](#)

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Display and edit a single agent's schedule for a week or the schedule planning period.

Related documentation:

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Use the **Master Schedule Agent-Extended** view to display/edit a single agent's schedule. See the toolbar image here and the button descriptions.



Tip

A legend at the bottom of the window indicates the particular type of schedule item that each bar color represents.

You can modify schedule items for individual agents in this view and insert schedule items for multiple agents.

Displaying the view

To display the **Master Schedule Agent-Extended** view:

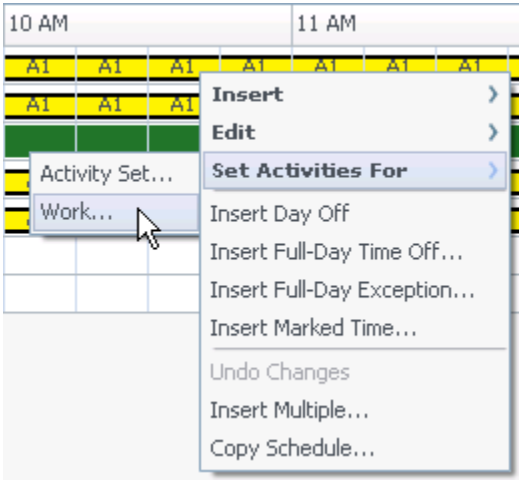
1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu, select **Agent Extended**.
4. In the **Objects** pane, select a single business unit, a single site within a business unit, or a single agent within a site.

Using the grid

The **Agent-Extended** view includes a grid for the selected agent. Each row in the grid contains a color-coded bar. Each bar represents a scheduled day or day off for the selected agent. The table below explains the fields and controls.

Double-click cells containing these items, to edit them: **Shift, Activity Set, Time Off, Meal, Break, Exception, Marked Time.**


| | |
|-----------------------------------|---|
| Scheduled agents | This indicator shows the number of agent days displayed (based on the selected Mode). |
| Edited schedules | This indicator shows the number of daily schedules you have edited in this view, but not yet saved. |
| Full-Day View | Select the Full-Day View check box to have the grid display the entire day similar to the Intra-Day view. If you clear this check box, the grid shows a more detailed view as shown for the Scenario Agent-Extended view. Full-Day View also affects the Options dialog box. |
| Mode: | The starting Mode is set to the default of one week, but can be changed to Schedule Planning Period (if Schedule Planning Periods are in use at your site). |
| Date: | These controls are the standard date selectors. The grid displays data for the period containing the selected date. |
| ! (Save Messages/Warnings) | <p>This column contains icons that provide information about the agents' schedules.</p> <ul style="list-style-type: none"> • A light-gray pencil icon indicates that the agent's day was edited after scheduling or rescheduling. • A yellow pencil icon indicates an item that generated a warning and you selected the Fix Later option. • A green pencil icon indicates schedule items that you have changed but not yet saved. • A red pencil icon indicates an item that generated an error. (Error conditions are more serious than warning conditions.) • A Swap icon indicates that the agent's day was assigned by trading or swapping. • A yield icon (upside-down red triangle) appears if there are pending changes that have not yet been committed by a user with Approve Changes security permission. <p>Double-click a yellow or red icon to review message details and resolve the unsaved items.</p> |
| Team | This column on the grid indicates the selected agent's assigned team. |
| <i>colored icon</i> | The column on the grid may display a colored icon. This icon, assigned in Polices > Contracts represents the agent's contract. |
| Agent | This column on the grid indicates each agent's name. |
| Date | This column on the grid indicates the calendar day. |
| Weekday | This column on the grid indicates the day of the |

| | |
|--------------------------------|---|
| | <p>week. (Select Day of Week in the Options > Column tab.)</p> <p>These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the Full-Day View check box and/or resize the columns.</p> <p>To make changes to the selected agent's schedule, right-click the timestep that you want to modify and then select the command from the shortcut menu. The figure below shows the menu when you right-click the dark blue area within a color-coded bar (unless you change the color). The menu items vary depending on the area clicked.</p> |
| [Timesteps] |  <p>See Modify Individual Agents' Schedules for instructions and explanations.</p> |
| [Horizontal scroll bar] | <p>Appears below the table when clearing the Full-Day View check box causes some timesteps to be hidden off screen. Scroll it to the right to display later timesteps.</p> |
| Legend | <p>Indicates the particular type of schedule item that each bar color represents.</p> |

Customizing the grid

You can resize the **Team**, **Agent**, and **Date** columns. For details, see the Getting Started. You can also add and remove columns.

| | |
|-------------------------|---|
| Site Name | <p>If displayed (using the Options dialog box), this column shows the name of the site for each agent on the selected day.</p> |
| Shared Transport | <p>If displayed (using the Options dialog box), this column shows the shared transport group participation for each agent on the selected day.</p> |



| | |
|--|--|
| Overtime | If displayed (using the Options dialog box), this column shows the duration of overtime for each agent on the selected day. |
| Paid Hours | If displayed (using the Options dialog box), this column shows each agent's paid hours for the selected day. |
| Total Hours | If displayed (using the Options dialog box), this column shows each agent's total hours for the selected day. |
| Start Time | If displayed (using the Options dialog box), this column shows each agent's start time for the selected day's work. |
| * (Comment) | If this column is displayed (using the Options dialog box), an asterisk (*) indicates that a comment was saved for the indicated agent and schedule day. Double-click a column cell to view or edit comments. |
|  (Accessible Schedule Details) | If displayed (using the Options dialog box), you can click this icon to display the Accessible Schedule Details dialog box, which simplifies and organizes commands for vision-impaired users and the screen readers that they use. |








Using the toolbar



The **Master Schedule Agent-Extended** view toolbar is similar to the **Master Schedule Intra-Day** view toolbar. The only exception is that **Agent-Extended** view does not contain a **Sort** button.

Modifying an agent's schedule

You can use the following buttons on the **Actions** toolbar (these commands also appear in the **Actions** menu):

| Icon | Name | Description |
|---|-----------------------------------|--|
|  | Cleanup | If you have Schedule Clean Up Master permission, opens the Cleanup Master Schedule Window that enables you to delete Master Schedule information for selected dates. |
|  | Rebuild intra-day schedule | Opens the Intra-Day Schedule Rebuild Wizard that enables you to rebuild an Intra-Day schedule for a specific day or time period within a day for a selected site, |

| Icon | Name | Description |
|---|---------------------------------|--|
| | | team, or agent. |
|  | Options | Opens the Options dialog box that enables you to customize the view. This includes whether to show agent availability, whether to use a 24-hour or 36-hour display, and whether to display or hide the Overtime , Paid Hours , Total Hours , Start Time , Comment , Site Name , Shared Transport , and Accessibility columns. |
|  | Auto-Commit | <p>The Auto-Commit toolbar button toggles on and off the auto-commit feature. The feature is also turned on and off by selecting Auto-Commit on the Actions menu. If it is on, changes are immediately applied to the Master Schedule. If it is off, the changes have Pending status and can be committed/ approved before they are incorporated in the official version of the Master Schedule.</p> <p>If you do not have the Approve Changes security permission for the Master Schedule, the auto-commit feature is disabled.</p> |
|  | Swap | Opens the Swap Agent Schedule Wizard that enables you to swap two agents' schedules. |
|  | Insert Multiple | Opens the Insert Multiple Wizard that enables you to insert breaks, meals, exceptions, days off, time off, shift, marked time and work sets for multiple agents or teams. |
|  | Delete Multiple | Opens the Delete Multiple Wizard, which enables you to remove multiple items from the Master Schedule at one time. |
|  | Edit Multiple | Opens the Edit Multiple Wizard, which enables you to edit multiple items in the Master Schedule at one time. |
|  | Commit/Rollback Multiple | Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes (changes entered when auto-commit was off or disabled) into |

| Icon | Name | Description |
|---|----------------------------|---|
| | | the Master Schedule or to remove them and return the Master Schedule to its former settings. |
|  | Save | <p>Saves any changes that you have made to the schedule. (If the server cannot save all changes, red or yellow icons in the grid's first column (see Save Messages/Warnings) indicate the agents for whom you must correct errors or acknowledge warnings.</p> <p>If you make schedule changes in the Agent-Extended view and do not click Save, you are prompted to save your changes when you select a different module or view, or when you launch certain wizards or child windows.</p> |
|  | Move to Current Day | Also known as the <i>Today</i> button. Click this button to display data for today. |