GENESYS™

Workforce Management Web for Supervisors (Classic) Help

Master Schedule Intra-Day View

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Contents

Manage agents' schedule details for a specific day in the Master Schedule.

Related documentation:

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In the **Master Schedule Intra-Day** view, you'll see a toolbar similar to the image shown here. Find the button descriptions below.

If you selected the **Show Performance Information** check box on the **Performance** tab of the Options dialog box, this window also shows performance data in a graph. If you have cleared the **Full-Day View** check box, data is also shown in a table.

You can modify schedule items for individual agents here, and you can insert schedule items for multiple agents.

See also: Modifying individual agents' schedules and Using the Intra-Day Schedule Rebuild Wizard.

Displaying the view

To display the Intra-Day 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 **Intra-Day**.

4. On the Objects pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below). WFM then selects matching item(s) from the other tree.

   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select multiple sites, teams, and agents, but only one business unit.

5. Click **Get data** to display the **Intra-Day** view for the selected agents.

Managing the grid

The **Master Schedule Intra-Day** view includes a grid with one row per agent and the following fields and controls. You can sort by site, team, contract, agent, shared transport, overtime, paid hours, total hours and start time, by clicking on the header for that column.

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

Grid controls

Time Zone	From this drop-down menu, select the **Time Zone** that WFM should use to display the data in graphs and tables.
Scheduled agents	Shows the number of agents displayed (based on your selection in the **Objects** tree).
Edited schedules	This indicator shows the number of agents whose schedules you have edited in this view, but not yet saved.
Full-Day View	Select the **Full-Day View** check box to display the current schedule's full day (compressed to fit on screen, without scrolling). Clear the **Full-Day View** check box to display every timestep in the entire day on the **Intra-Day** grid (scrolling required) and above the grid, display a summary of corresponding statistics: **Coverage Scheduled**, **Staffing Calculated**, **Staffing Required**, **Difference Calculated**, **Difference Required**, **Service Level Scheduled**, **ASA Scheduled**, **Deferred Service Level Scheduled**, **Overtime Scheduled**, and **Overtime Required**.
Date selector	Standard date selectors.
Target	Displays the Select Target dialog box, where an object tree lets you choose a **Performance Data Target** that can be: a business unit, a multi-site activity, a site, an activity, or an activity group. See Performance Data Display for details.
Chart Type	Controls what statistics appear in the graph. See Performance Data Display for details.
Granularity	Specifies the granularity, in minutes, of the timesteps in the grid by selecting a number—**15** (default), **30**, or **60**—from the drop-down menu.
Refresh Performance Data	Refreshes the grid. See Performance Data Display for details.

Grid columns

! (*Save Messages/Warnings*)	This column contains icons that provide information about the agents' schedules. • 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 light-gray pencil icon appears if the agent's day was edited after scheduling or rescheduling. • A **Swap** icon appears if the agent's day was assigned by trading or swapping. • A Yield icon (upside-down red triangle) appears if there are pending changes. Pending changes must be committed by a user with **Approve Changes** security permission. • An agent icon and red check box appear for every schedule day that contains a granted calendar item (if the option **Show agents with granted and scheduled rotating pattern or any other calendar preference** is selected in the Options dialog box). Double-click a yellow or red icon to review message details and resolve the unsaved items.
Site	This column shows the site of each agent.
Team	This column shows each agent's assigned team.
	This column shows each agent's contract. The color-coded symbol appears in each row, and the column heading is blank.
Agent	This column shows each agent's name.
Shared Transport	If displayed (using the **Options** dialog box), this column shows the shared transport group participation for each agent on the selected day. **Shared Transport** is known by many different names worldwide—bus, carpool, ride share, lift share, and para transit, for example. See Wikipedia for details.
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.
Shift Start Time	If displayed (using the **Options** dialog box), this column shows each agent's shift or full day start time for the selected day's work.
Shift End Time	If displayed (using the **Options** dialog box), this column shows each agent's shift or full day end

	time for the selected day's work.
	If there is a full day item without an end time, the value in this column is empty. This column is sortable.
Shift	If displayed (using the **Options** dialog box), this column shows the shift name.
* (*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.
[Timesteps]	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. To make changes to one agent's schedule at a time, right-click the timestep that you want to modify and then select the command from the shortcut menu. See Modify Individual Agent's Schedules for instructions and explanations.
[Horizontal scroll bar]	This scrollbar appears below the grid when clearing the **Full Day View** check box causes some timesteps to be hidden offscreen. Scroll it to the right to display later timesteps.
Legend	Identifies the particular type of schedule item that each bar color in the grid indicates.
Details	When you click an agent's row, this field lists the agent's scheduled activities on the selected day.

Customizing the grid

You can display more timesteps by resizing some columns to the left of the grid. For details, see Getting Started.

Finding agents

To find a specific agent in the **Master Schedule Intra-day** view:

1. Search the table for particular agents, by using the **Find Agent** dialog box. To open it, select **Find** from the **Edit** menu or press **Ctrl + F**.

The **Find Agent** dialog box opens. You can search by first or last name.

2. Enter part or all of the agent's name and then click **OK**.
The **Master Schedule Intra-Day** view display shifts to display information for the selected agent.

Toolbar: Modifying agents' schedules

Use the following buttons on the toolbar (or commands in the **Actions** menu) to modify multiple agents' schedules at once, or to further customize/cleanup the displayed grid:

Icon	name	Description
	Cleanup	Opens the Cleanup Master Schedule Window window, which enables you to delete **Master Schedule** information for selected dates and agents.
	Rebuild intra-day schedule	Opens the Intra-Day Schedule Rebuild Wizard. Use this wizard to rebuild an **Intra-Day** schedule for a specific day or time period within a day for a selected site, team, or agent.
	Options	Opens the Options dialog box. Enables you to customize the view, including whether to show agent availability, use a 24-hour or 36-hour display, display marked time on top, display performance data, and display or hide the **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Accessibility**, and **Comment** columns.
	Filter	Opens the Schedule Filter dialog box. Enables you to filter the displayed Master Schedule information. (If you set a new filter, this immediately invokes **Get data**.)
	Sort	Opens the Sorting dialog box.
	Swap	Opens the Swap Agent Schedules Wizard, which enables you to swap two agents' schedules.
	Insert Multiple	Opens the Insert Multiple Wizard, which enables you to insert breaks, meals, and exceptions,days off, time off, shifts, marked time, or work sets for multiple agents or teams.

Icon	name	Description
	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 the Master Schedule or to remove them and return the Master Schedule to its former settings.
	Save	If you have the appropriate access rights, clicking this button saves any Master Schedule changes that you have made in this view. If the server cannot save all changes, red or yellow icons in the grid's first column indicate those agents for whom you must correct errors or acknowledge warnings.
	Auto-Commit	Toggles the auto-commit feature on and off (or you can select **Auto-Commit** from the **Actions** menu). If on, changes are immediately applied to the **Master Schedule**. If off, changes have **Pending** status and can be committed/approved before they are incorporated in the official version of the **Master Schedule**. If you do not have the security permission **Approve Changes** for the **Master Schedule**, auto-commit is disabled.
	Meeting Scheduler	Opens the Meeting Scheduler, which enables you to schedule meetings to already build scenario for selected agents.
	Move to Current Day	Also known as the *Today* button. Click this button to display data for today.

To make detailed schedule changes for one agent at a time (such as inserting, editing, or deleting the agent's schedule items), see Modifying individual agents' schedules.

If you make schedule changes in the **Intra-Day** 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.

Performance data display

Selecting the **Show Performance Data** check box on the **Performance** tab of the **Options** dialog box adds a graph and a table to the **Master Schedule Intra-day** display.

> ### Tip
> The table appears only if you clear the **Full Day View** check box.

To configure the performance data views:

1. Select a target for the performance data by clicking the button next to the **Target:** label.

   The list that appears can contain the activities and activity groups that are associated with the site selected on the **Objects** pane, and the multi-site activities that are associated with the current schedule. If no site is selected, the list contains only multi-site activities.

2. Select the granularity in which performance data should be presented: **15**, **30**, or **60** minutes.

3. Select the type of data to be displayed in the graph and table.

   - Schedule coverage appears as a red line on the graph. To configure the graph, select a value from the **Chart Type** drop-down list:

     - **Calculated** (**Calculated Staffing**)—Appears on the graph in blue.

     - **Required** (**Required Staffing**)—Appears on the graph in yellow.

     - **Advanced** (both **Calculated** and **Required Staffing**)—Appears on the graph as a blue area for the calculated staffing and as a yellow line showing the required staffing.

     - **Overtime** (calculated as **Calculated Staffing–Overtime Requirement**)—Appears on the graph as a light blue area.

     - **Overtime Advanced** (calculated as **Scheduled Coverage–Overtime Scheduled**)—Appears on the graph as a line in magenta. By default, the graph shows **Calculated Staffing**.

   - The table always displays values for **Schedule Coverage** and **Calculated Staffing**. It might show additional figures, depending on your selections on the **Performance** tab of the Options dialog box.

If you are not using automatic updates, click **Refresh Performance Data** to update the performance data view. You can select **Update Automatically** on the **Performance** tab of the **Options** dialog box.

The **Multi-Skill Enabled** label appears on the right end of the **Performance Data Display** if this feature is enabled in Genesys Administrator. Contact your Genesys Professional Services Representative for information about this feature.

> **Tip**
>
> WFM presents Performance data in the **Master Schedule > Intra-Day** view in the same format as the data in the **Performance > Intra-Day** view; specifically, empty data is no longer shown as 0.