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Workforce Management Web for Supervisors (Classic) Help

[Master Schedule Weekly View](#)

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Configure summary tables to display the total paid hours, working start/end times, or shift names for selected agents.

Related documentation:

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Use the **Master Schedule Weekly** view to display a summary table for selected agents. Selected agents can be in multiple sites but must all be in the same business unit. See the toolbar image here and the button descriptions below.



Tip

You can also see a summary table of total paid hours, working start/end times, or shift names for your schedule planning period. See Mode for details.

When displaying the **Master Schedule Weekly** view, you can use the Intra-Day Schedule Rebuild Wizard.

Displaying the view

To display the **Master Schedule Weekly** 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 on the toolbar, select **Weekly**.
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 you can 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 populate the Weekly view table for the selected agents.

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

Reading the data in the table

The **Weekly** view table contains rows for each agent that you selected in the **Objects** tree. (If a scroll bar is displayed to the right, you can use it to reveal more agents.) This table includes the following columns:

| | |
|---------------------------|---|
| [Expand/Collapse] | If in Planning Period mode, the first column provides expand/collapse controls that you use to display or hide agent details. |
| Team | This column lists each agent's team. |
| Agent | Two columns show an icon representing each agent's contract and the agent's name. |
| [Week Start Dates] | If you display agent details and you are in Planning Period mode, the rows below each agent's name indicate the start date for each week in the schedule. |
| [Weekdays] | <p>These cells show agent schedule information for each weekday, for each week in the schedule. The cells' contents correspond to your selection from the Show Data for drop-down list.</p> <p>If an agent is not scheduled for a shift on this day, the cell will contain Day Off, Working Hours (for scheduled working hours without a shift), or an exception name (for scheduled full-day exceptions).</p> <p>An icon in the cell for a weekday indicates whether the schedule has been changed for that agent.</p> <ul style="list-style-type: none">• If the agent's schedule for that day was assigned during scheduling or rescheduling, no icon appears.• If the agent's day was edited after scheduling or rescheduling, a light-gray pencil icon appears.• If the agent's day was assigned by trading or swapping, the swap icon appears.• 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 icon and red check box appears 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). |
| Weekly Totals | <p>Shows an agent's total working hours for the</p> <p>Tip If there have been multiple changes, the icon represents the most recent status.</p> |

| | |
|-------------------------------|---|
| | displayed week. |
| | Shows an agent's total paid hours for the schedule planning period. |
| Planning Period Totals | <p>Tip To set this period's duration and start date, see the Configuration > Policies > Contracts > Site Settings tab.</p> |

The **Weekly Totals** and **Period Totals** boxes below the table show a grand total of all weekly or planning period total paid hours (respectively) for all selected agents.

Configuring the view

To configure the displayed table, use these controls at the top of the working pane:

Show Data for

From this drop-down list, select what you want to display inside each day's table cell:

| | |
|--------------------------------------|---|
| Total Paid Hours | Total working time for the day. |
| Start/End Times | Start and end times of agents' work. |
| Shift or Schedule State Names | Names of agents' assigned shifts and other full-day states. |

Mode

Select one **Week** or **Planning Period** from the **Mode** drop-down list. The table displays data for the selected period. If no schedule planning period is configured, or if more than one site is selected on the **Objects** pane, then the **Planning Period** option is disabled.

Planning Period Mode

Planning Period mode displays schedules for the entire planning period. White and dark gray indicates the type of date range that you are viewing.

Planning Period Color Legend

- **White**—Indicates dates that fall within the planning period.
- **Dark Gray**—Indicates dates that are outside the planning period.

Date

Use the standard date-selection controls to move to other weeks.

Toolbar

You can use the following buttons on the Actions toolbar (or commands in the **Actions** menu) to further customize the displayed table:

| Icon | Name | Description |
|---|-----------------------------------|--|
|  | Cleanup | Opens the Cleanup Master Schedule Window. Enables you to delete Master Schedule information for selected dates and agents. |
|  | Rebuild Intra-day Schedule | Opens the Intra-Day Schedule Rebuild Wizard to rebuild an Intra-Day schedule for a specific day or time period for a site, team, or agent. |
|  | Options | Opens the Options dialog box. Enables you to select/de-select the Agent Rank and Site Name columns. |
|  | Filter | Opens the Schedule filter dialog, enabling you to filter the displayed information according to activities and contract types. (If you set a new filter, this immediately refreshes the view.) |
|  | Sort | Opens the Sorting dialog box, which allows sorting by Team Name, Contract, Agent Name (first or last), Agent Rank or Site Name. You can sort in ascending or descending order. Note that Agent Rank sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank. |
|  | Swap | Enables you to swap two agents' schedules with the Swap Agent Schedules Wizard. |
|  | Insert Multiple | Opens the Insert Multiple Wizard, which enables you to add multiple items to the Master Schedule at one time. |
|  | Delete Multiple | Opens the Delete Multiple Wizard, which enables you to remove multiple items from the Master Schedule at one time. |
|  | Commit/Rollback Multiple | Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes into the Master Schedule or to remove them and return the |

| Icon | Name | Description |
|---|--------------------------|---|
| | | Master Schedule to its former settings. |
|  | Meeting Scheduler | Opens the Meeting Scheduler Wizard. |

Important

You can save changes from within the **Master Schedule Weekly** view only if you have appropriate access rights.

Options dialog

Use the **Options** dialog box to display/hide the **Agent Rank** column in the **Schedule Scenario** and **Master Schedule Weekly** views. To open this dialog box:

- Click the **Options** button on the toolbar or select **Options** from the **Actions** menu.

The dialog box that opens for **Weekly** view has two tabs, **Options** and **Columns**.

On the **Options** tab:

- Select **Show agents with granted and scheduled rotating pattern or any other calendar preference** to display an icon and red check box near the agents name for every schedule day that contains a granted calendar item.
- Click **Apply** to save.

On the **Columns** tab:

- Select **Agent Rank** or **Site Name** to display the corresponding column; de-select to hide the column.
- Click **Apply** to save.