# Workforce Management Web for Supervisors (Classic) Help

Meeting Scheduler

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# Contents

Use the Meeting Scheduler to create ad hoc meetings, add participants, and set the date and other details.

**Related documentation:**

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## Scheduling meetings

To schedule meetings:

1. In the **Schedule** module, select one of these views: **Master Schedule Weekly**, **schedule> Weekly**, **Master Schedule Intra-day**, **schedule> Intra-day**.

2. At the top right of the **Work** pane, select the week that you want to schedule the meeting.

3. Click **Meeting Scheduler** .

4. At the Please select a meeting from the list page, choose an existing meeting (or decide to create a new one) and enable or disable auto-commit.
   If you chose to use an existing meeting, you will see all **Meeting Scheduler** pages except Meeting Parameters. Otherwise, you will see only the Participants and Meeting Parameters pages.

5. At the Participants page, choose the agents who should attend (if you are creating a new meeting). if you use an existing meeting, the list of participants is read-only.

6. At the Dates Range page, choose the range of dates that are acceptable for the meeting.

7. At the Meeting Parameters page, select the meeting type, possible dates, possible times, duration, and minimum percentage of required attendees.

8. A message box appears, listing how many agents were scheduled for the meeting. Click **OK**.

9. If some agents were not scheduled, a message box may appear listing them. Click **OK**.
   The meeting is scheduled with exceptions, representing meetings, are inserted into the schedule.

### Meeting Schedule versus Meeting Planner

The Meeting Scheduler is best suited for scheduling ad hoc meetings and other meetings that you did not know about when you built the original schedule.

The Meeting Planner (in the **Policies** module) is useful for scheduling pre-planned meetings especially ones that recur, such as weekly team meetings or bi-weekly one-on-one coaching sessions. If you want to edit, copy, or delete meetings, use the Meeting Planner.

## Select meeting

To fill in the **Please Select A Meeting From The List** screen in the **Meeting Scheduler Wizard**:

1. Choose one of the following two radio buttons:

    - **Create new meeting**—You will configure the meeting by making choices on this screen and two others: Participants and Parameters.

    - **Use existing meeting**—You will configure the meeting by making choices on this screen and two others: Participants and Date range.

2. Select or clear the **Auto-commit Changes** check box , to control the auto-commit feature.
   **When enabled, the auto-commit feature applies the meeting that you are scheduling to the Master Schedule, immediately after you click Finish. When auto-commit is disabled, your meeting will have the status Pending after you click Finish, and must be committed /approved before it is incorporated into the Master Schedule.**
   **If you do not have the Approve Changes security permission for the Master Schedule, the Auto-commit Changes check box is disabled.**

3. Click **Next** to proceed to the next screen in the wizard.

## Select participants

To fill in the **Participants** screen in the **Meeting Scheduler Wizard**:

1. Select any combination of **agents**.
   **If you are creating a new meeting, you can select individual agents from multiple sites or teams, or you can select entire sites or teams. However, you can select only within the business unit for which you displayed the Intra-Day or Weekly view.**
   **If you use an existing meeting, the list of participants is read-only.**

2. Click **Next** to proceed to the next screen in the wizard.

## Select dates

To enter the date range for the meeting:

1. Enter or select a date in each of the two date selectors.

    - Start Date

    - End Date

2. Click **Next** to proceed to the next screen in the wizard or **Finish**, whichever is enabled.

### Date selection and schedules

Here is how date selection affects the schedule:

- The **End Date** must be later than the start date.

- The **End Date** date selector is enabled only if the **Recurrence Rule** for this meeting is **Weekly** or **Monthly**.

- WFM will insert into the schedule a single instance of the specified meeting for each agent.

- Default values and validation rules shall depend on the meeting's recurrence rule (if one exists):

  - **Daily**—The default start date is the same as the first date of the current view. The default end date is disabled and always equal to the start date. If you are scheduling in a scenario, the dates must be inside the scenario date range.

  - **X-weekly**—The default start date is the same as the first day of the week that is selected in the current view. The end date is the last day of the X-week period from the start date. If you are scheduling in a scenario, the dates will be trimmed to stay inside the scenario date range.

  - **Monthly**—The default start date is the first day of month that is selected in the current view. The end date is the last day of the same month as the start date. If you are scheduling in a scenario, the dates will be trimmed to stay inside the scenario date range.

## Select meeting parameters

These are some other meeting parameters to consider.

### Properties

1. Enter the meeting name into the **Meeting Name** field.

2. Select an exception type from the **Exception type** drop-down menu.
   The list of exception types is populated by exceptions from all sites that were selected on the Participants screen, and were assigned the status **Exception Can Be Used in Meeting Planner/ Scheduler** in the **Policies** > Exceptions Types view.

### Dates and reoccurence rules

1. Enter or select a date in the **Start Date** box.

2. Enter or select a date in the **End Date** box.

3. Optional: Clear the check box to its right to disable the **End Date**.

4. Select the check boxes that correspond to all days of the week that are acceptable for the meeting.

### Time and duration

1. Enter or select a time in the dialog box **Earliest Start**.

2. Enter or select a time in the dialog box **Latest End**.

3. Enter or select the number of hours and minutes that the meeting will last in the dialog box **Meeting Duration**.

4. Select a time zone from the **Time Zone** drop-down list.

> ### Tip
> Only configured time zones appear in this list; each item includes the time zone's relationship to GMT. For example, Pacific Standard Time, which is 8 hours later than Greenwich Mean Time is presented as PST (GMT-8.0).

## Meeting type

1. Select one of the following three radio buttons, which enable the properties that are associated with them.

   - **Single Group**—The default meeting type. Represents a single meeting for all agents who are specified on the Participants tab.
     Enter or select the meeting's minimum number of attendees requirement in the **Minimum % of required attendees** box. Set this value to **1%** to indicate no minimum requirement for the number of attendees—for example, to schedule a meeting for as many attendees as possible.

     > #### Important
     > The value 0 (zero) is interpreted as 100% to accommodate data that was migrated from WFM 6.5, because that version did not include the variable **Minimum Percentage of Selected Attendees** in its database.

   - **Single Agent**—A common activity, such as a webinar, that can occur at the most convenient time for each agent.

   - **Multiple Groups**—A common time but for multiple groups. Enter or select a number in each of the four fields below, to specify the group sizes.

     | | |
     |---|---|
     | • **Min(imum) Number of Groups** | • **Min(imum) Group Size** |
     | • **Max(imum) Number of Groups** | • **Max(imum) Group Size** |

2. Click **Finish**.
   A progress message shows that the meeting being scheduled.
   If the meeting cannot be scheduled for all selected agents, a message box lists how many agents are scheduled, and a second message box lists the agents who could not be scheduled. Click **OK** to acknowledge each message.