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Workforce Management Web for Supervisors (Classic) Help

[New Schedule Scenario Wizard](#)

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Create and populate schedule scenarios, choosing the optimal scenario as a basis for the master schedule.

Related documentation:

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Use the **New Schedule Scenario Wizard** to create a new schedule scenario:

1. On the **Schedule Scenarios** view toolbar, click the New button.
The first of the New Schedule Scenario Wizard's screens, General Parameters, opens.
2. Fill in the necessary information and then, click **Next**.
3. Continue filling in each of the following screens in the wizard:
 - Select Forecast Scenario
 - Select Activities
 - Filter by Contract
 - Add Agents
 - Add Profile Agents
 - Add Profiles
4. When finished in each screen, click **Next**.
5. Optionally, click **Help** on any screen to open a **Help** page that explains that screen's options.
6. Optionally, click **Back** to return to the previous screen if you need to revise your entries there.
7. In the last screen, click **Finish**.
The scenario is created.

In the **Schedule Scenarios** view, you can now select **My Scenarios** to load the scenario into the Scenarios table.

Specifying the general parameters

To fill in the first New Schedule Scenario Wizard's **General Parameters** screen:

1. In the **Name** text box, enter a name for the schedule scenario.
2. If you want this scenario to be available to other WFM users, select the **Shared** check box.
3. If you want to base this scenario on one that already exists, select the existing scenario from the **Based on** drop-down list.
Basing your new scenario on an existing scenario is a convenient way to build schedules with frequently used settings. The wizard takes the dates, activities, and agents (real, virtual, and profile)

from the source scenario and applies them to the new scenario. You can then change these parameters.

4. In the **Start Date** field, enter (or select) the scenario's start date. You can type directly into the field, use the up or down arrow to modify the displayed date, or click the button at the right to display a calendar.

Important

If the `WeekStartDay` setting has been specified in Business unit properties, your scenario's starting weekday must match this setting. Otherwise, your scenario starts on the first weekday as determined by your operating system's regional settings.

5. In the **End Date** field, enter (or select) the scenario's end date. The maximum time between **Start date** and **End Date** is 42 days (6 weeks).

Important

You must build the scenario in units of one week. For example, if the schedule starts on a Monday, it must end on a Sunday. Schedules must be at least one week, and no more than six weeks, long. WFM Web always obeys schedule period constraints, if you are using a scheduling period for your site, regardless of the number of weeks in the scenario.

6. In the **Extended End Date** field, enter (or select) the scenario's extended end date, if necessary.

Important

Default value: the scenario's end date. This value is useful when you create a schedule scenario for bidding. (Use the Profiles/Bidding view to configure bidding.) Edit this value manually to specify an extended end date for the scenario ...to specify that the schedule will apply over a longer period of time (maximum: 6 months).

For example, **Extended End Date** could define an entire quarter—3 months. **Start Date** and **End Date** could define a period of 1 week that Agents actually use for bidding. When the schedule scenario is published to the **Master Schedule**, the 1-week schedule would be repeated for the entire quarter.

You can also use this value to extend a non-bidding schedule for real agents in the same way: create a 1-6 week schedule that repeats itself over a longer period of time. When you publish this schedule scenario out into the future, you can optionally ask WFM to overlay items from the **Calendar**, such as days off, time off, and exceptions.


7. Optional: Enter text into the **Comments** field.
8. Optional: Select the **Use forecast data from forecast scenario** check box to specify that the schedule will be built based on a forecast scenario, instead of on the **Master Forecast**. If you select this check box, the next wizard screen will be the Select Forecast Scenario dialog.
9. Click **Next** to proceed to the next screen.

Selecting a forecast scenario

In the **New Schedule Scenario Wizard**, select a forecast scenario from the list, to specify that the next schedule build will be based upon it.

This list is not editable, and it contains the following columns for each forecast scenario that is listed: **Name, Start Date, End Date, Owner, Shared, and Comments.**

Important

You can also reach this dialog box by clicking the  button that appears next to the **Forecast** field in the **Schedule Scenarios** view. In this case, the first choice in the list is MASTER, to specify that the schedule will be built based upon the published **Master Forecast**.

Selecting activities

To fill in the **Select Activities** screen of the New Schedule Scenario wizard:

1. Select all activities that you want to include in this schedule.
2. In the **Activities** list, you can expand business units to display their sites and expand sites to display their activities. #; You can select any number of activities or add activities later, but you can add them only for the sites that you select now, on this screen.
If you checked Use forecast data from forecast scenario in the General Parameters screen of this wizard and selected a Forecast scenario in the Select the Forecast Scenario screen, all activities from the Forecast scenario are automatically selected in this screen.
3. Optionally, select the **Additionally Filter Agents By Contracts** check box to enable the Filter by Contract screen, which appears next when enabled.
4. Click **Next** to proceed to the next screen.

Week start day validation

WFM applies the following validation rules:

- If you select activities from two BUs with different week start days, the following warning appears:
It is not possible to create schedule scenarios for selected business units because they have different week start days. You must select BUs with the same week start day to proceed.
- If you select BUs that have the same week start day, but select a scenario start date that is not the first week start day, the following warning appears and will not allow you to proceed:
Selected scenario start date does not match selected business unit(s) week start day, . Please, return to the previous page and select an appropriate start date.

The **New Schedule Scenario Wizard** date selection controls use the locale settings and does not attempt to enforce the week start day.

Filtering by contracts

This page appears in the New Schedule Scenario Wizard only if you selected the **Additionally Filter By Contracts** check box in the Select Activities screen.

1. Select one or more contracts from the tree, which includes business units, **sites, and contracts**. **The tree shows only those contracts that the scenario included when it was created and, by default, all contracts matching the activities that are selected on the Select Activities screen, are selected.**
2. Click **Next** to proceed to the next screen.

Adding agents

To fill in the **Add Agents** screen of the New Schedule Scenario Wizard:

1. Select the agents that you want to include in the scenario. **In the Agents list, you can expand Business Units to display their sites and expand sites to display their agents. The list shows only those agents who have the skills that are required for the activities you selected on the Select Activities screen.**
2. To fill the new scenario with the schedules from the source (**Based on**) scenario, select the **Copy Schedules** check box.
3. To insert a granted exception, time off or day off item from the calendar, select the **Insert granted exception, time off and day off calendar items** check box. **You can insert multiple items. However, this check box is enabled only if the following conditions are met:**
 - The scenario you are creating is based on an existing scenario.
 - The **Copy Schedules** check box is selected.
4. Click **Next** to proceed to the next screen.

Adding profile agents

Profile agents inherit the contract and skill set of the selected real agent, but the profile agent's schedule slot is not assigned to this (or any other) real agent. Use profile agents when you create a bidding scenario. See the topic Configure Bidding Scenario in the **Schedule Bidding** section.

To add profile agents who are based on real agents into the same team as real agents:

1. Select or clear individual agent check boxes, as needed.
2. Select or clear the **Place Profile Agents, Based On Real Agents, Into Their Teams** check box.
3. Click **Next** to proceed to the next screen.

Scheduling with profiles

You can create schedule scenarios using a mix of real agents and profiles. You can also create schedule scenarios based on user-defined profiles, and then assign agents to the resulting schedules. See the Scenario Profiles view for instructions.

When using profiles, generate a schedule scenario that includes open schedules. An open schedule is one that has no agents assigned to it. Then, insert agents into the open schedules using any criteria. (WFM automatically filters the list of qualified agents, based on the selected schedule.)

Agents are displayed in a tree inside a table with these columns:

- **Agents**—Each agent's name.
- **Present**—The number of agent profiles, based on this real agent, that are already present in scenario. This number is read-only.
- **Add**—Select the check box in this column to add this agent's profile to the scenario. Clear the check box to not add the profile. As a shortcut, you can select a single check box for any *branch* of the tree—business unit, site, or team—to select all items beneath.

Adding profiles

To complete the **Add Profiles** dialog in the New Schedule Scenario wizard:

1. Expand and/or scroll through the **Profiles** list to select the number of each type of **Contract** profile that you want to include in this scenario.
You can expand business units to display their sites and expand sites to display their profiles. The list shows only those profiles that have the skills that are required for the activities you selected on the Select Activities screen.
2. Modify (if necessary) the number of occurrences each profile that should be included in the scenario.
3. Click **Finish**.
WFM saves your new scenario and restores the Schedule Scenarios view.

Adding profiles versus adding profile agents

Here is the difference between the profiles on this screen, and the profiles on the previous screen:

- On the previous **Add Profile Agents** screen, you have the opportunity to select *profile agents*. This will result in the schedule scenario including open schedules, based on hypothetical agents that are similar in skill set and **Contract** to the agents whose profile you select.
- On the **Add Profiles** screen, you are selecting *profiles*. A profile is based on a **Contract**, and is defined by a set of one or more skills and skill levels that are required for an agent to fit this profile. When creating a schedule, you can include any combination of real agents, profile agents, and profiles.