GENESYS

Workforce Management Web for Supervisors (Classic) Help

Publishing and Extracting Schedules

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Contents

Use a wizard to transfer unpublished (or previously-published) schedule scenarios to the Master Schedule, or to extract Master Schedule information to schedule scenarios.

Related documentation:

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Using the Publish Schedule Wizard you can:

  * Publish schedule scenarios data to the WFM database.

  * Extract schedule scenarios data from the WFM database.

Why publish schedules?

  * Publishing represents the act of making a schedule scenario *official*. Only the Master Schedule is regarded as the official schedule.

  * Until a schedule is published, you cannot calculate certain performance data or real-time agent adherence data.

  * Until a schedule is published, agents cannot view it in the WFM Web for Agents client interface.

Publishing to the Master Schedule

Before launching the Publish Schedule wizard:

  * Assign real agents to your schedule scenario's profile slots. (Only real agents' schedules are published to the Master Schedule.)

  * Commit all pending changes that you want to include in the Master Schedule. Uncommitted pending changes are disregarded when the scenario is published.

To publish a schedule:

  1. In the Schedule Scenarios view's Scenarios Table, select the scenario that you want to publish. Then, click the **Publish** button on the **Actions** toolbar.
     The Publish Schedule Wizard's Select Action screen opens.

  2. Select **Publish to Master Schedule**, and click **Next**.
     The Publish to Master Schedule screen opens.

  3. In the **Publish Dates** section, select the **Start Date** and **End Date**.
     By default, the selected scenario's start and end dates appear in these fields.

  4. If you want to repeat the schedule in the future, select **Publish to Date Range**, and then select the **Start Date** and **End Date** that you want.

The Publish to Date Range feature enables you to publish the same schedule scenario for more than one schedule period. You can quickly publish schedules to fill an extended time period. However, be aware that:

- If schedule length and the period selected to be published to the new date range do not match exactly, the Wizard copies as many days of the schedule as will fit into the new date-range period. For example, if the schedule is three weeks and the **Publish to Date Range** period is two weeks, the wizard copies only the first two weeks of the schedule. If the schedule is two weeks and the **Publish to Date Range** period is five weeks, the wizard copies the whole schedule twice in succession and then copies the first week again to provide the fifth week of the new date range.

- All data within the schedule scenario is published to the new date range exactly. All schedule items, such as exceptions, breaks, meals, and time off, are also transferred.

5. From the **Agents** list, select which agents you want to publish to the target schedule.
   You can expand business units to display their sites and you can expand sites to display their agents. You can select any number of real (not profile) agents.

6. Optional: Select the **Insert granted exception, time off, and day off Calendar items** check box to overlay these items in the schedule when the scenario is published to the Master Schedule. Clear the check box to ignore these items.
   This option is useful when you want to use "fixed" agent schedules. You would create a 1-to-6 week schedule for one or more agents, and then use this feature to copy the schedule out into the future. When copying the schedule, WFM will account for granted Calendar items such as time off, exceptions, and days off. WFM may not be able to overlay all of the granted Calendar items because they may conflict with the items already in the schedule. In this case, you will receive a warning about the Calendar items which could not be scheduled.

7. Optional: Select the **Publish forecast scenario too** check box to publish the associated forecast scenario that you selected in the Schedule Scenarios view, for the selected dates for all activities in the scenario.
   If more control is needed over forecast-scenario publishing, it should be done from the forecast-scenario view instead. The default value is cleared (not selected), and this check box is absent if the schedule scenario is not associated with any forecast scenario.

8. Click **Finish**.

Baseline Master Schedule

After you publish a schedule scenario to the Master Schedule, WFM retains a snapshot of the Master Schedule at that point in time. This is called the baseline Master Schedule. Then, after you make changes to the Master Schedule, such as adding exceptions and granting vacations, you can compare the schedule coverage shown in the current Master Schedule against the schedule coverage stored in the baseline Master. The Schedule Summary Report and the Schedule Summary view present the comparison.

The Master Schedule baseline is created/updated each time something is published to the Master Schedule for a particular date range. Example: Assume on May 25, you publish the June schedule scenario to the Master Schedule. Assume on May 28, you republish the same June schedule scenario to the Master Schedule. On the Schedule Summary Report and in the Schedule Summary view, WFM uses the May 28 published schedule as the baseline against which the current schedule is compared.

Extracting a schedule from the WFM Database

To transfer data from the Master Schedule into a schedule scenario:

1. In the Schedule Scenarios view's Scenarios Table, select the scenario into which you want to extract the data. Then, click the **Publish** button on the **Actions** toolbar.
   The Publish Schedule Wizard's Select Action screen appears.

2. Select **Extract from Master Schedule**, and then click **Next**.
   The Extract from Master Schedule screen appears.

3. In the **Dates** section, select the **Start Date** and **End Date**.
   You must select dates within the target scenario's date range.

4. From the **Agents** list, select the agents whose schedules you want to extract to the target scenario.
   You can expand business units to display their sites and you can expand sites to display their agents. You can select any number of real (not profile) agents.

5. Click **Finish**.

> ## Tip
> Pending changes to the Master Schedule are not extracted to the schedule scenario.