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Workforce Management Web for Supervisors (Classic) Help

Rotating Patterns Properties

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- Supervisor

Configure properties and other settings in rotating weekly patterns. Rotating patterns consist of rotating work weeks, work days, work hours, and/or work activities.

Related documentation:

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In the **Rotating Patterns Properties** pane, you can add, copy and paste, or delete weekly patterns to/from Rotating Patterns, move weekly patterns up or down within the list, and set various property parameters for each day within the weekly pattern.

See control and setting descriptions for the following panes, in addition to the Rotating Pattern Properties:

- Weekly Patterns
- Rotating Pattern Activities
- Available Activities
- Shifts
- Weekly Rules

Weeks in rotating patterns

Weeks in Rotating Patterns are displayed in separate rows for each week name, with the total number of weeks displayed in the bottom-right corner of the **Properties** pane. Rotating Patterns containing a large number of weeks (for example, more than 30) display quickly on one page. You can review or edit a week, by selecting the row to open the properties for that week, or select the row to copy the entire week and paste it to other weeks. The Search function generates quick and accurate results (even when using partial search criteria).

Days in rotating patterns

While editing or creating Rotating Patterns, you can select, mark, or copy the settings for a single day and then copy, transfer, or distribute these settings to a single or multiple, selected days (in other words, copy once, paste multiple times). When you select a day, and click **Copy**, the **Paste** icon is enabled.

Properties

Use the control in this pane to perform the following tasks:

 Expand pane	Expands the Properties pane to display all column in one view.
 Add Week	Adds a Weekly Pattern to the Rotating Pattern.
 Delete Week	Deletes the selected Weekly Pattern from the Rotating Pattern. When you click Delete , a Confirmation dialog is displayed, asking you to confirm the deletion. Click Yes to proceed or No to cancel the deletion.
 Move Week Down	Moves the selected Weekly Pattern down from its original position in the Weekly Patterns list.
 Move Week Up	Moves the selected Weekly Pattern up from its original position in the Weekly Patterns list.
 Copy	Copies the selected Weekly Pattern. After the pattern is selected, the Paste icon is enabled.
 Paste	Pastes the Weekly Pattern (that was selected and copied).
 Help	Displays a Help topic that describes the Properties pane.
 Save Now	Saves any changes made within the Properties pane.

The **Properties** pane is divided into three sections. The top section contains two fields:

- **Name**—The name of the Rotating Pattern.
- **Week Days**—The week day on which the Rotating Pattern starts.

The bottom section Weekly Patterns, is described below. Within the **Weekly Patterns** pane you can open the following panes by clicking the related field:

- Click the **Activities** field in any day row to open the Rotating Pattern Activities pane.
- Click the **Shifts** field in any day row to open the Shifts pane.
- Click the **Week** (for example, **Week1**) to open the Weekly Rules pane.

Review Validation Messages

If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which includes a list of error and warning messages. For more information about these messages, see Review Validation Messages.






Weekly patterns

This pane has the following rows and columns, which can be configured for each day of the week:

Name	The name of the Weekly Pattern for the selected day.
Weekday	The day on which the weekly pattern begins. (Monday to Sunday)
Column Descriptions:	
Day	A day within a weekly pattern.
Day Off Rule	<p>The rules that determine whether a day off can be assigned for that day. The possible rules are:</p> <ul style="list-style-type: none"> • Day In—A granted shift, granted any shift, or granted availability. • Day Off Possible—The day can be a working day or a day off depending on which provides the most optimal schedule. • Day Off—The day must be a day off.
Shift	The shift that is assigned for the selected day of the week. Click in this field for any day and the Shifts pane opens, enabling you to choose from a list of existing shifts. For a description of the controls in this pane, see Shifts pane.
Availability Time	The time that the agent is available during the shift for the selected day. In the drop-down menu, choose Use Shift Time or Start/End Time . Choosing Start/End Time means that the times that are set in the Start Time and Estimated End Time fields are used on that day.
Start Time	The start time for the shift on the selected day (used only if the Start/End Time option is set in the Availability Time field for the selected day).
Paid Hours/Duration	The number of hours (or duration) for which the agent is paid.
Estimated End Time	The estimated time of the shift on the selected day (used only if the Start/End Time option is set in the Availability Time field for the selected day).
Activities	The Activities that are assigned to the agent for this shift or day. Click in the field for any day and the Rotating Patterns Activities pane opens, from which you can select Activities . For a description of the controls in this pane, see Rotating Pattern Activities pane.
Week number> (weekly pattern name>)	The row displaying the week number (for example, Week1) and the name of the weekly pattern. Clicking on this row opens the Weekly Rules pane.





Rotating pattern activities

Open this pane by clicking in the **Activities** column and see the following controls, columns, and fields:


No activity limitations <i>check box</i>	When checked, all of the activities listed are assigned. If unchecked, only the selected activities are assigned to the agent for the selected day's shift.
 Apply	Moves the selected activities to the Weekly Patterns pane.
 Add Activity	Opens the Available Activities pane. When an activity is added, it is assigned to the agent for the selected day's shift. If the No Activity Limitations check box is checked, all of the activities listed are assigned.
 Remove Activity	Removes the selected activities in the Rotating Pattern Activities pane.
X Close	Closes the Rotating Pattern Activities pane.
 Help	Displays a Help topic that describes the Rotating Pattern Activities pane.
 Search <i>field</i>	Enter the search criteria. For example, the name of the activity.
Activity Name	The name of the activity.


Available activities




Open this pane by clicking **Add Activity** in the **Activities** pane and see the following controls, columns, and fields:

 Apply	Moves the selected activities to the Rotating Patterns Activities pane.
 Close	Closes the Available Activities pane
 Help	Displays a Help topic that describes the Available Activities pane.
 Search <i>field</i>	Enter the search criteria. For example, the name of the activity.
Activity Name	Name of the activity.

Shifts

Open this pane by clicking  in the **Shifts** column and see the following controls, columns, and fields:

Any Available Shift <i>check box</i>	When checked enables the agent to work any available shift on the selected day. If unchecked, the agents must work the assigned shift on the selected day.
 Apply	Moves the selected shift to the selected day in the weekly pattern.

 Close	Closes the Shifts pane.
 Help	Opens a Help topic for the Shifts pane.
 Search field	Enables you to enter search criteria. For example, the name of a specific shift.
Name	The name of the shift.

Weekly rules

Open this pane by clicking the row containing the weekly pattern name in the **Weekly Patterns** section of the **Properties** pane, and see the following controls and fields:

Weekly Pattern Name	The name of the Weekly Pattern.
Use Weekly Paid Hours <i>check box</i>	When checked, the Minimum Paid Hours and Maximum Paid Hours fields are enabled and can be defined by entering a minimum and maximum number of hours. When unchecked, these fields are disabled.
Minimum Paid Hours	The minimum number of hours defined for this pattern, entered in hh:mm format. If this constraint is set, WFM schedules the agent to work at least this many hours for this particular week of the Schedule Planning Period . Valid values are 00:00 to 168:00. This value must be less than or equal to the Maximum Weekly Paid Hours setting in any associated contract. Must include all paid breaks and meals.
Maximum Paid Hours	The maximum number of hours defined for this pattern, entered in hh:mm format. If this constraint is set, WFM will schedule the agent to work no more than this many hours for this particular week of the Schedule Planning Period . Valid values are 00:01 to 168:00. This value must be greater than or equal to the Minimum Weekly Paid Hours setting in any associated contract. Must include all paid breaks and meals.

Rotation types

By combining the settings in the Weekly Pattern pane, you can create nine different types of rotation days:

1. **Day Off**—The agent must be assigned a day off on this day.
2. **Any Shift**—The agent can receive any compatible shift or a day off. In effect, the rotating pattern does not impose limitations on Scheduler for this day.
3. **Availability**—The agent can receive any shift that falls within the specified earliest start time and has

the correct number of paid hours. Scheduler also has the option to assign a day off.

4. **Flexible Shift**—The agent must be assigned the specified shift, but the start time and paid hours are flexible within the limits of the shift configuration. Scheduler also has the option to assign a day off for this day.
5. **Fixed Shift**—The agent must be assigned the specified shift with the exact start time and number of paid hours that are specified. Scheduler also has the option to assign a day off for this day.
6. **Granted Fixed Shift**—The agent must be assigned the specified shift with the exact start time and number of paid hours that are specified. Scheduler cannot assign a day off for this day.
7. **Granted Flexible Shift**—The agent must be assigned the specified shift. The start time and number of paid hours can be adjusted by Scheduler. Scheduler cannot assign a day off for this day.
8. **Granted Availability**—The agent must be assigned a shift that falls within the specified earliest start time and has the correct number of paid hours. Scheduler cannot assign a day off for this day.
9. **Granted Any Shift**—The agent must be assigned a shift on this day. Scheduler cannot assign a day off for this day.

You can create a Weekly Pattern using any combination of these rotation types, as long as the combination does not conflict with paid hours and working days constraints.

Important

For **Fixed Shift** types, Scheduler can assign a shorter shift than specified in the Rotating Pattern configuration if the agent has requested a number of preferences for the scheduling period. This happens because Scheduler treats this rotation type as a preference.