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Workforce Management Web for Supervisors (Classic) Help

Scenario Intra-Day: Wizards and Dialogs

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Use the wizards and dialogs in the Scenario Intra-Day view to publish/extract schedule data, set the performance target, edit comments and other options, and review messages.

Related documentation:

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Publish Schedule Wizard

Use the **Publish Schedule Wizard** to publish specific date ranges from the scenarios to Master Schedules, or extract specific date ranges from the Master Schedules to scenarios.

At any scenario view, click **Publish** . The wizard activates and presents these screens:

Select the Action screen

1. Select the radio button that corresponds to the action you wish to take:
 - **Publish to the Master Schedule**
 - **Extract from the Master Schedule**
2. Click **Next**.

Publish to the Master Schedule from the scenario

This screen appears only if you selected **Publish** to the Master Schedule at the previous screen.

1. Make the following selections:
 - a. In the **Dates** area, use the spin boxes or pop-up calendars to specify **Start** and **End dates** for the selected scenario. This date range is the publishing *source*.
 - b. Select the **Publish To Date Range** check box to activate that area, then use the spin boxes or pop-up calendars to specify **Start** and **End dates** for the Master Schedule.
This date range is the publishing destination.
 - c. In the **Agents** area, select agents from an object tree individually, or in groups by selecting teams, sites, BUs, or Enterprise.
 - d. Select the **Insert Granted Exception, Time Off** and **Day Off Calendar** items check box to specify that this action is performed during publication.
2. Click **Finish** (or **Previous** to return to the **Select Action** screen).

Extract from the Master Schedule to the scenario

This screen appears only if you selected **Extract** from the Master Schedule at the previous screen.

1. Make the following selections:
 - a. In the **Dates** area, use the spin boxes or pop-up calendars to specify **Start** and **End dates** for the selected scenario. This date range is the publishing *source*.
 - b. In the **Agents** area, select agents from an object tree individually, or in groups by selecting teams, sites, business units, or Enterprise.
2. Click **Finish** (or **Previous** to return to the **Select Action** screen).

Performance target data

To see the performance data in the **Master Schedule Intra-Day** or **Scenario Intra-Day** view, choose a target, such as an enterprise, business unit, site, activity group, or activity (either multi-site or single-site). The target is the source of the performance data.

To change the **Select Target** window:

- Click the **Target:** button on the **Schedule Intra-Day** view window



Tip

This option is available only if you have chosen to view performance data by selecting the **Show Performance Information** check box on the **Performance** tab of the Options dialog.

Selecting an appropriate time zone

When you select a site on the **Object** pane (for example, San Francisco), you are also specifying that site's time zone, which may differ from the data source's time zone. You can change the time zone manually by selecting the appropriate zone from the **Time Zone** drop-down list near the upper right of the **Intra-Day** view. The selected time zone is applied to the grid and graphs that you view when you request performance data. Schedules and whatever you select to view would be displayed in the selected time zone, regardless of the data source's local hours (WFM makes the appropriate time conversion).

Viewing multi-site activity data

Select the **Use Multi-site Activities** check box to display forecast data that is taken from multi-site

activities (MSA), and schedule data that is the sum/average of **Activities** under your selected target (MSA, business unit, or site). All data is transposed to the time zone of the site that you selected on the **Object** pane.

Clear the **Use Multi-site Activities** check box to display all MSA data as a sum/average. All data is transposed to the selected site's time zone.

If you set the **Use Multi-site Activities** button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.

Edit Comments dialog

Use the **Edit Comments** dialog box to enter or view comments about an agent's schedule for the selected day in the **Scenario Intra-Day** or **Agent-Extended** view. To open this dialog box:

- Double-click the **Comments** cell in the column labeled * for the appropriate agent.

The **Comments** column is visible only if you select it on the Columns tab of the Options dialog box.

This dialog box contains the following controls:

- **Comments**—Enter or edit comments in this text box.
- **OK**—Click this button to accept your changes and close the dialog box. The WFM database does not save your comments until you save the scenario.
- **Cancel**—Click this button to discard your changes and close the dialog box.

Important

Adding and editing comments changes the schedule. Therefore, when you save comments, WFM validates the schedule and relevant schedule warning messages appear. A schedule warning message generated when you first save the schedule scenario generates again when you save your comments if the schedule still contains the problems that were noted in the warning.

Options dialog

Use the **Options** dialog box to configure the data that is shown on the:

- Intra-Day view or Agent Extended view for the current scenario.
- Master Schedule Intra-Day or Master Schedule Agent-Extended view.

Opening the Options dialog

To open the **Options** dialog:

1. Click **Options**  on the **Actions** toolbar, or select **Options...** from the **Actions** menu. The **Options** dialog box opens.
 - When called from an **Intra-Day** view, it has three tabs: **Options**, **Performance**, and **Columns**.
 - When called from an **Agent-Extended** view, it has two tabs: **Options** and **Columns**. Each tab is described below.
2. After you are done configuring the **Options** dialog box, click **OK** to save your changes, or **Cancel** to restore the original selections.

The **Options** dialog box closes and the view refreshes. The settings that you configure for a scenario or the **Master Schedule** appear whenever you return to the view for that scenario or for the **Master Schedule**, until you log off.

Configuring the Options

To configure options in this dialog box:

1. Clear the **Show Schedule Legend** check box (if you do not need the **Legend** to appear) to provide more space for the grid.
2. Select the **Show Agent Availability** check box if you want to see agent availability on the grid. Hours when an agent is unavailable are then shown in light gray on the grid.
3. Select the check box **Show agents with granted and scheduled rotating pattern** or any other calendar preference to see which schedule days contain such an item. The result: a red check box and **Agent** icon appears in the left-most column (labeled "!") for every **Agent** who meets these conditions.

Tip

You can use this tool to learn whether an agent was given a schedule based on a schedule preference, which might influence your decision to modify this agent's schedule. This icon is displayed only if the agent was given a rotating pattern or preference (such as for time off) as a result of building a schedule. If an agent's schedule is manually edited to give him or her a preference, or a schedule from a rotating pattern, then the icon will not be displayed.

4. Select the radio button for the hours you want to show, **24** to show 24 hours or **36** to show 36 hours.
5. Select the **Presentation** type: **Schedule only**, **Schedule on top**, or **Marked time on top**.

Your selection affects the colored bars in the schedule. If **Schedule only** is selected, you cannot see **Marked time**.

Configuring Performance

To configure the **Performance** tab (not available in **Agent-Extended** view):

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1. If you select the Show Performance Information check box, you can further customize exactly what performance information WFM Web shows on the **Intra-Day Schedule** view.
If you clear this check box, the rest of the options on this tab are disabled.
 2. If you prefer not to see the legend that explains the colors used to distinguish performance data, clear the **Show Performance Legend** check box.
 3. The **Update Automatically** check box determines whether schedule changes are shown when they happen.
Clear this only if you have network bandwidth issues that make automatic updates a problem.
 4. If you selected to view performance data, you can select the check boxes to show additional information in the performance table.

Tip

You see the table *only* if the **Full-Day View** check box is not selected.

In addition to scheduled coverage and calculated staffing, which always appear, you can select any or all of these **Show additional data** options to appear in the table:

- Required Staffing
- Difference between Coverage and Calculated Staffing
- Difference between Coverage and Required Staffing
- Scheduled Service Level Percentage
- Scheduled Deferred Service Level Percentage
- Scheduled ASA (**Average Speed of Answer**)
- Overtime Schedule (default: cleared)
- Overtime Requirement (default: cleared)

Important

If any of the cells in the **Difference in Calculated Staffing** or **Difference in Required Staffing** columns show as understaffed, WFM alerts the user by changing the color of the cell to red. Although red is the default color, you can change it, by using the settings in **About > Settings** (in the upper-right corner of the GUI).

Showing or hiding columns

To configure the **Columns** tab:

- Select the check boxes for the optional columns that you want to display. Clear the check boxes for any columns that you want to hide. For **Intra-Day** and **Agent-Extended** views, you can add the following columns: **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Accessibility**, and **Comments**. In **Intra-Day** view, all columns are sortable, except for **Comments**. In

Agent-Extended view, these columns are not sortable.

Review message (Save) dialog

Use this dialog to respond to any warnings or errors that the server returned during your last attempt to save an agent's edited schedule.

The dialog box includes the following columns and controls:

Team Name	Displays the team to which this agent belongs.
Agent Name	Displays the agent whose schedule generated this message.
Messages	Displays the message type (either Warning or Error), numeric code, and the message text.
Action	Use each message's drop-down list to select an action to resolve the warning or error: <ul style="list-style-type: none">• Save—Saves the edited agent schedule. This is the default action for warnings. It is unavailable for agent schedules whose edits generated errors (which are more severe than warnings).• Fix Later—Does not attempt to save the agent schedule, but keeps it in the Intra-Day grid so that you can further modify it. This is the default action for agent schedules whose edits generated errors.• Do Not Save—Discards the change that caused the warning or error to be generated.
OK	Closes the dialog box, applies your selected actions, and retrieves fresh data from the server.
Close	Closes the dialog box without saving or refreshing data.

These errors and warnings are generated by schedule changes that you made manually in the **Intra-Day** view. They differ from **Validation** warnings and errors, which WFM Web generates during the schedule building process.