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Workforce Management Web for Supervisors (Classic) Help

Intra-Day Schedule Rebuild Wizard

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Use the wizard to rebuild an Intra-Day schedule for multiple days (selected dates or a date range) for a site, team, or an agent.

Related documentation:

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While in a Schedule Scenario you can rebuild from any of the following views: Intra-Day, Weekly, Agent Extended, or Profiles/Bidding view.

While in a Master Schedule view, you can rebuild from any of the following views: Intra-Day, Weekly, or Agent Extended.

The rebuild process can include any activities and agents defined for this site/day in the selected scenario or Master Schedule.

Reasons for using this wizard

The goal of the WFM scheduling algorithm is to minimize the over and under-staffing of agents, against the forecasted staffing requirements. This is the outcome when a schedule is generated. However, several circumstances might cause the schedule to be suboptimal by the time a particular schedule day arrives. For example:

1. You might have reforecasted volumes and staffing for the day.
2. Agents might have called in sick or were given time off.
3. Existing agent schedules might have been manually adjusted.
4. Additional agents might have been added into the schedule.
5. Meetings or other types of exceptions might have been added to the schedule.

Because of this, you may wish to reoptimize the schedule day. It does not make sense to reoptimize days or hours that have already passed. You probably do not want to reoptimize the current hour, since any changes to meals, breaks, and/or work activities would be difficult to communicate to the affected agents. The Intra-day Rebuild wizard allows you to reoptimize specific types of schedule items for selected agents, based on a particular configured start time, which would normally be later than the current time when you invoke the reoptimization.

Using the wizard

To rebuild schedules using the Intra-Day Schedule Rebuild wizard:

1. Select a Schedule Scenario or Master Schedule view (Intra-Day, Weekly, or Agent Extended).
2. Click the **Rebuild intra-day schedule** button on the **Actions** toolbar.

3. Complete each screen as it appears, and then click **Next**, or click **Finish** if it is the final screen:

- Select Site
- Select Options
- Shared Transport Constraints
- Team Synchronicity
- Select Agents
- Select Activities

Tip

- The **Select Activities** screen may not appear, depending on your selections at the **Select Options** screen.
- You can always click **Cancel** to discard your selections and close the wizard without making any changes.

Site and build options

The **Select Sites** screen in the **Intra-Day Schedule Rebuild Wizard** displays a table, with a separate row for each available site. Within each row are columns that contain build options.

- Choose all items in any column by selecting the check box at the top of the column. Clear the check box to reject all items.
- Choose any individual item in any row by selecting the check box in that row. Clear the check box to reject that item.

Changes in the wizard

The Intra-day Schedule Rebuild Wizard also has the new **Use Shared Transport Constraints** option. This option has the same purpose and similar functionality as the **Shared Transport Constraints** option in the Schedule Build Wizard.

The columns contain the following build options.

Site

Each row contains a site that is in the currently selected schedule scenario. You must select at least one site.

If you do not see a site that you want to include, cancel and create a new schedule scenario that contains that site, and then use it as the basis for your schedule build.

Force single skill

If you select this option and an agent has multiple skills, the agent can be scheduled for only one activity on each workday.

If you clear this option, the agent can be scheduled for multiple activities on the same day.

Use required

If you select this option, the schedule is built by using the Required Staffing forecast, and not the Calculated Staffing forecast.

Disable monthly constraints for the first month

Select this check box when the first month is not complete (because you are scheduling from the middle of the month) and there is no historical data for the beginning of the month. In this situation, schedule building cannot correctly accommodate monthly constraints, such as minimum or maximum work hours per month.

Select this check box to relax those constraints for this month.

Shuffle agents

If you select this option, the agent pool is *randomized* before scheduling. (*Randomizing* ensures that the schedule's results are independent of the sequence in which agents are loaded into the scheduling algorithm.)

Use team constraints

If you select this option, the schedule start times are synchronized for agents in the same team, within the configured threshold.

If you select this option, the **Team Synchronicity** page will appear later in wizard, and there you can specify how daily schedules for agents in the same team should be synchronized.

Use shared transport constraints

Select this option to enable shared transport group constraints when the schedule is rebuilt. The participants in a shared transport group can work in shifts that begin and end at different times; however, they should not deviate greatly, or the shared transport group will become impractical. You will specify the length of the deviation.

If you select this option, the Shared Transport Constraints Wizard appears, instead of the **Team Synchronicity Wizard**. There, you will specify the maximum allowable deviation in the schedule of each participant in the same shared transport group.

Tip

Shared Transport is known by many different names worldwide—bus, carpool, ride

share, lift share, and paratransit, for example. See Wikipedia for details.

Exclude granted agents from used constraints

If you select this option, agents who have been granted full-day exceptions or working hours are not considered when team synchronization is enforced.

Important

Always select this option when you are using team constraints.

Click **Next** to continue or **Cancel** to discard your selections and close the wizard.

Use secondary activities

Check this option to assign a secondary activity to agents directly. Activity assignment is based on skills and skill levels, therefore a secondary activity is one in which at least one of the agent's skills is marked as secondary. Leave this option unchecked if you want only primary activities considered in the Site schedule scenario.

Select options

Use the Intra-Day Schedule Rebuild Wizard's **Select Options** screen to select date(s), time, and rescheduling options.

1. In the calendars displayed for date(s) selection, enter or select the day(s) to be rebuilt in the schedule. The calendars allow you to select multiple date(s) or a date range. However, the selected date(s) or date range cannot be outside the scenario's date range and out of 2-weeks date range. The default value shown is the date(s) selected in the view from which the Wizard was called.
2. In the **Start from** selector, enter or select the time in the scheduled day(s) to start rebuilding. The default value shown is the computer's current time rounded to the nearest timestep start plus one hour. Before selecting the time from which you want to rebuild, consider that you will need to notify the affected agents of these changes.
3. In the **Time Zone** selector, select the applicable time zone. The default is Local.
4. Select one item from the **Rescheduling Options** list of self-explanatory radio-button choices. Selecting the final option (**Reschedule breaks, meals, activities/activity sets/task sequences, shift start and/or end times may change**) will enable check boxes that control whether shift start time, shift end time, and paid duration are fixed (not changeable).

Important

The final check box **Paid duration is fixed** in this grouping applies to breaks and meals (shift items), which are defined as paid or non-paid. If paid duration is fixed, when WFM rebuilds, it cannot give an agent a shift with a different paid duration than the agent currently has assigned. Otherwise, if the agent has a flexible Contract, it could be possible for the agent to get assigned a shorter or longer shift than currently assigned. The agent could potentially be assigned different meals and breaks as well.

5. Keeping the **Auto-commit changes** check box default value (selected) instructs the schedule builder to commit all schedule changes. Otherwise, they will be put into the schedule in a pending mode.
6. Select the **Additionally filter agents by contract** check box if you want to select agents with contracts for the schedule rebuild. When selected, the wizard displays the contracts tree. Select the check box for each contract you want to filter and click **Next**. The agents are then filtered according to the contracts you selected. Select the check box for each agent to include in the schedule rebuild.
7. Click **Next** to continue, or **Cancel** to discard your selections and close the wizard.

For information about task sequences (which are included in the fourth and fifth rescheduling options), see Task and Shift Sequences in this Help and in the *Workforce Management Administrator's Guide*.

Shared transport constraints

Tip

Shared Transport is known by many different names worldwide—bus, carpool, ride share, lift share, and paratransit, for example. See Wikipedia for details.

The members of a shared transport group can work in shifts that begin and end at different times, but they should not deviate greatly or the shared transport group will become impractical. You are specifying the maximum allowable deviation in the schedule of each participant in the same shared transport group.

If you enable **Shared Transport Constraints**, this dialog box appears in place of the **Team Synchronicity** page (team restraints and shared transport group restraints are mutually exclusive). Type, or use the spinner controls, to specify the maximum allowable deviation between the start times and end times of shifts for the shared transport group members. You can specify any value between 1 minute and 23 hours, 59 minutes; most practical values will be less than 30 minutes.

Team synchronicity

This screen appears only if you selected at least one site under the category **Use Team Constraints** on the first screen. Each site that you checked on that screen (**Select Sites**) appears in the leftmost column of a table. The others columns display certain settings for each site.

Specify the following parameters:

| | |
|---|---|
| Synchronize Days Off | Select this check box to specify that days off should be synchronized for all teams. |
| Synchronize By | <p>Each cell is a drop-down menu that you can use to specify the synchronization combinations to apply when you are building the schedule:</p> <ul style="list-style-type: none">• No additional synchronization• Shift Start Time—If this check box is checked, use the duration control Maximum Start Time Difference to specify the maximum difference between shift start times inside the team. Use the format HH:MM; where 02:59 is two hours and fifty-nine minutes.• Paid Duration• Shift Start Time and Paid Duration• Shift Start Time, Paid Duration, and Meals• Shift Start Time, Paid Duration, Meals and Breaks• Paid Duration and Meals• Paid Duration, Meals and Breaks |
| Maximum Start Time Difference | Each cell is a spinner box where you can specify this value in the hh:mm format. The range is from 0 (zero) to 23:59. |
| Apply constraints only to the same contracts inside team | <p>Select this check box to specify that while synchronizing teams, WFM must take configured contract information into account while creating the schedule. By default, this check box is cleared.</p> <p>Tip This check box is enabled only when one of the options Paid Duration, Paid Duration and Meals or Paid Duration, Meals and Breaks is selected in the Synchronize By column. The check box is disabled, otherwise, because it does not apply when shifts are synchronized.</p> |

Click **Next** to continue, or **Cancel** to discard your selections and close the wizard.

Select agents

Use the Intra-Day Schedule Rebuild Wizard's **Select Agents** screen to select one or more teams or agents within a team.

1. Under **Select Agents**, you can expand business units and sites to display agents. The tree shows only those agents who have the skills that are required for the scheduled activities.

You can select individual agents from multiple teams, or you can select whole teams or the whole site.

A highlighted background appears around the names of Agents whose schedule was edited in the selected date range after the last build or rebuild.

2. Select **Do not rebuild modified agent schedules** to exclude agents whose schedules have already been changed from the last time the schedule was built, re-built, or published.
3. Click **Next** (or **Finish** if that is offered instead).

Select activities

The **Select Activities** screen appears if, on the Rescheduling Options screen, you select one of the following options:

- **Reschedule activities/activity sets/task sequences only**
- **Reschedule breaks, meals, activities/activity sets/task sequences, without affecting shift start/end times**
- **Reschedule breaks, meals, activities/activity sets/task sequences, shift start and/or end times may change**

To complete this screen:

1. Expand the object tree as needed.
2. Select one or more activities or multi-site activities.
3. Select **Retain scheduled activities** to have the build add any previously selected activities while keeping the activities that are currently in the Schedule.
4. Click **Finish**, or **Cancel** to discard your selections and close the wizard.