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Workforce Management Web for Supervisors (Classic) Help

Schedule Scenarios

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Contents

Learn about the different views within the Scenarios view and the type of data you'll find in each of them. Then, open and manage new and existing schedule scenarios.

Related documentation:

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Use the Scenarios view in the Schedule module to create new scenarios or edit an existing schedule scenario. When you open a scenario, that scenario's name becomes a menu on the toolbar (and a selection in the **Schedule** menu).

> ### Important
> Some restrictions apply when viewing and deleting **Schedule** scenarios:
>
> - Users must have access to at least one **Site** in the **Schedule** scenario to see it.
> - Users must have access to all **Sites** in the **Schedule** scenario to delete the scenario.
>
> Other restrictions can be applied through configuration options that control the level of access to multi-site activities in Schedule scenarios. Ask your Genesys Professional Services representative for more information about security.

To open a scenario's views, select it from the sub menu. To close it, click **Close**  .

You can then select the following views from the **scenario_name>** menu:

Coverage	Compares staffing coverage to forecasted (calculated and required) staffing data, and highlights overstaffed or understaffed timesteps.
Weekly	Displays a weekly summary table of total paid hours, working start/end times, or shift names for a site's agents and/or profiles.
Intra-Day	Displays schedule details for a 24- or 36-hour period, enabling you to modify schedules for individual or multiple agents. **Tip** You do not need the **Approve Changes** security permission (as required by the **Master Schedule**) to commit your changes (which are only visible to you). You can roll back or remove your own pending changes. You can view your pending changes in the **Weekly**, **Intra-Day**, and **Agent-Extended** views.

Agent-Extended	Displays schedules for one week or the schedule planning period for a single agent.
Profiles/Bidding	Enables you to assign real agents to profile schedule slots.
Summary	Displays service-level and related statistics for the scenario.
State Group Totals	Presents **Schedule State Group Totals** for the configured **Schedule State Groups**.

Scenarios view

Use Schedule Scenarios to create, open, edit, or delete schedule scenarios, and to publish scenarios to the **Master Schedule**.

Displaying the view

To display the Schedule **Scenarios** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
   The Scenarios table (a list) appears at the top of the Data pane.

Opening scenarios

To open a scenario, double-click it or select it and click **Open**  .

When the **Scenarios** view is active, the **Objects** pane displays the following options:

- **My Scenarios**—Displays scenarios that you have created.
- **Shared Scenarios**—Displays Shared scenarios created by other users. Visible only if you have the permission **Access Scenarios**. See security access rights in Roles.
- **Other Scenarios**—Displays (if you have appropriate access rights) unshared scenarios created by other users.

To select an option:

- Click it. Your selection displays the matching scenarios in the Scenarios table.

Reading the data

The **Scenarios** table appears at the upper right of the WFM Web for Supervisors window. Its rows display scenarios that match your selection in the **Objects** tree. The columns (sortable except for **Comments** and **Extended End Date**) display the following information for each scenario:

Name	The scenario's name.
Start date, **End date**	The start and end dates for the schedule in this scenario. **Range:** from 1 to 6 weeks.
Extended End date	Specifies the time period from the currently-published **Forecast** that will be used to calculate the average staffing needs for this schedule. For example: the schedule itself covers only the time period between **Start date** and **End date**, but the **Forecast** data used to calculate staffing needs for the schedule is based on the time period between **Start date** and **Extended End date**. Tip It's okay if the **Forecast** data covers a shorter period of time than **Extended End Date** defines.
Owner	The name of the user who created the scenario.
Shared	A check mark indicates a shared scenario; an open box indicates one that is not shared.
Comments	Remarks entered by a user who created or edited the scenario.

Populating the Data pane

To populate the **Data** pane with the scenario's details:

- Click a row in the **Scenarios** table.

Editing scenarios in the table

To edit a scenario:

- Double-click the scenario in the **Scenarios** table. Or click its row in the **Scenarios** table, and then click **Open**.

The controls described below are available to you if you own, or have access rights to, the scenario.

Using the Actions toolbar

You can use the following buttons on the toolbar (these same commands also appear on the **Actions** menu):

Icon	Name	Description
	**New**	Opens the New Schedule Scenario Wizard.
	**Create based on...**	Opens the New Schedule Scenario Wizard. The data in the wizard pages is copied from the scenario that was highlighted

Icon	Name	Description
		when you clicked this icon.
	**Open**	Opens the selected scenario from the **Scenarios** table. You can then edit its properties using the **Data** pane.
	**Close**	Closes the open scenario (and prompts you to save unsaved data).
	**Publish**	Opens the Publish Schedule Wizard for transferring schedule information between the selected scenario and the **Master Schedule**.
	**Delete**	Deletes the selected scenario. Includes a confirmation.
	**Mark as Shared**, **Mark as Not Shared**	Changes the sharing status of the selected scenario.
	**Filter**	Displays the Statuses filter, which you can use to control which **Statuses** are displayed. These Statuses are described below.
	**Sort**	Opens a sorting dialog box that allows sorting by **Name**, **Owner**, **Sharing**, **Time of creation**, **Time of last modification**, **Scenario start date**, and **Scenario end date**. You can sort in ascending or descending order.

Scenario properties—Data tab

To display the following controls:

- Click the **Data** tab on the **Scenario Properties** pane at the lower right.

Name	Click inside to edit the scenario's name.
Start date, **End date**	Displays the scenario's start and end dates.
Extended End date	Displays the scenario's extended end date.
Owner	Displays the name of the scenario's creator.
Shared	Display only; a check mark indicates a shared scenario; an open box indicates one that is not shared.
Created, **Modified**	Displays the scenario's original creation date and last modification date.
Forecast	Displays the associated forecast scenario or

	MASTER (if the **Master Forecast** is associated).
...	Click this button to display a pop-up list of forecast scenarios, then select one upon which to base the next schedule build. The table lists all forecast scenarios that you can select, to base the next schedule build upon. The first choice is MASTER. 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**.
Comments	Click inside to enter or edit comments about the scenario.
Save	Click this button to save your changes to the scenario's name and/or comments. Disabled if there are no changes.
Cancel	Click this button to cancel your changes, restoring the scenario's previous name and/or comments. Disabled if there are no changes.

Scenario properties—Statuses tab

To display a table with the following information, click the **Statuses** tab on the **Scenario Properties** pane at the lower right. This table's columns are:

Site	Displays the sites covered by this scenario.
Status	See the Status Column Values table for all possible values and their definitions.
Bidding Start	Bidding start date for this scenario, defined in **Control Bidding Process Wizard**. (Exclusive to bidding scenarios).
Bidding End	Bidding end date for this scenario, defined in **Control Bidding Process Wizard**. (Exclusive to bidding scenarios).
Ranking Used	Ranking system used for this scenario, defined in **Auto-Assign Schedules** dialog. (Exclusive to bidding scenarios).
Last Published	Date and time that this scenario was last published to the **Master Schedule**.

Status column values

This table defines each possible value that may appear in the **Status** column.

New	This scenario was just created and has no schedule built for it.
Imported	This scenario was imported from the **Master Schedule**.
Scheduled	A schedule was built for this scenario.

Scheduled with Profiles	A schedule containing profile agent schedules was built for this scenario.
Profiles Assigned	A schedule containing profile agent schedules was built for this scenario, and every profile agent schedule has an actual agent assigned.
Published	This scenario was published to the **Master Schedule**.
Bidding Pending Scenario	This scenario has a bidding window and agents defined, but the current date is before the bidding window's start date. (Exclusive to bidding scenarios).
Open for Bidding	This scenario is currently open for bidding. (Exclusive to bidding scenarios).
Bidding Closed	This scenario is closed for bidding. (Exclusive to bidding scenarios).

Statuses filter

Use the **Statuses Filters** dialog box to control which **Statuses** are displayed:

1. Select the check boxes for **Statuses** that you want to display.
   By default, all **Statuses** are selected for display.
2. Clear the check boxes for any activities that you want to hide.
3. You can select the **Statuses** at the top of the list to select the entire list at once.
4. Click **OK** to apply your selections, or **Cancel** to abandon them.

WFM filters the view according to your selections.