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Workforce Management Web for Supervisors (Classic) Help

Scenario Intra-Day View

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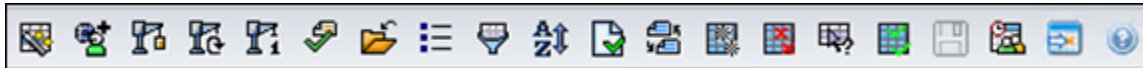
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Manage schedule details for agents and profiles, for a selected scenario on a specific day.

Related documentation:

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The toolbar at the top of the **Intra-Day** is shown here. See the button descriptions below.



If you selected the **Show Performance Information** check box on the **Performance** tab of the Options dialog, this window also shows performance data in a graph. If you have cleared the **Full-Day View** check box, data is also shown in a table.

You can modify schedule items for individual agents or profiles in this view, and insert schedule items for multiple agents and/or profiles.

Displaying the view

To display the **Scenarios Intra-Day** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Scenarios**.
The Schedule Scenarios table displays.
3. Open a scenario by double-clicking its name in the table list or by selecting its name and clicking **Open**



The scenario's name appears on the toolbar, like a menu.

To display the open scenario's **Intra-Day** view:

1. From the scenario_name menu on the toolbar, select **Intra-Day**.
2. On the **Objects** pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.
A default performance target is selected for the Intra-Day schedule view. To change that selection, see Performance target data.
3. Click **Get data** to display the **Intra-Day Performance** graph (if you have opted to view it) and the schedule grid.



Adjusting the time zone

From this drop-down menu at the top right of the view, select the **Time Zone** that WFM should use to display the data in graphs and tables for this view.

Using the grid

The **Intra-Day** view includes a grid with one row per agent, and the following fields and controls. You can sort by columns such as site, team, contract, agent, shared transport, overtime, paid hours, total hours, and start time by clicking on the header for that column.

Scheduled agents <i>display</i>	This indicator shows the number of agents displayed (based on your selection in the Objects tree).
Edited schedules <i>display</i>	This indicator shows the number of agents whose schedules you have edited in this view, but not yet saved.
Full-Day View <i>check box</i>	Select the Full-Day View check box to have the Intra-Day grid display the entire day. If you clear this check box, the grid shows a more detailed view.
Date: <i>selectors</i>	These controls are standard date selectors.
! messages & warnings <i>column</i>	<p>This column contains icons that provide information about the agents' schedules.</p> <ul style="list-style-type: none">• A green pencil icon indicates schedule items that you have changed but not yet saved.• A red pencil icon indicates an item that generated an error. (Error conditions are more serious than warning conditions.)• A light-gray pencil icon indicates that the agent's day was edited after scheduling or rescheduling.• A swap icon indicates that the agent's day was assigned by trading or swapping.• A yellow icon indicates an item that generated a warning and you chose the Fix Later option.• A Yield icon (upside-down red triangle) appears if there are pending changes not yet committed to the scenario.• An agent icon and red check box appear for every scheduled day that contains a granted calendar item (if the option Show agents with granted and scheduled rotating pattern or any other calendar preference are selected in the Options dialog). <p>Double-click a yellow or red icon to review message details and</p>

	resolve the unsaved items.
Site <i>column</i>	This column indicates each agent's assigned site.
Team <i>column</i>	This column indicates each agent's assigned team.
Contract <i>column</i>	This column indicates each agent's assigned contract. The contract  icon is displayed in the column.
Agent <i>column</i>	This column indicates each agent's name.
Shared Transport <i>column</i>	If displayed (using the Options dialog box), this column shows the membership for each agent in Shared Transport Group on the selected day.
Overtime <i>column</i>	If displayed (using the Options dialog), this column shows the duration of overtime for each agent on the selected day.
Paid Hours <i>column</i>	If displayed (using the Options dialog), this column shows each agent's paid hours for the selected day.
Total Hours <i>column</i>	If displayed (using the Options dialog), this column shows each agent's total hours for the selected day.
Start Time <i>column</i>	If displayed (using the Options dialog), this column shows each agent's start time for the selected day's work.
 (Accessible Schedule Details) <i>icon</i>	If displayed (using the Options dialog), you can click this icon to display the Accessible Schedule Details dialog, which simplifies and organizes commands for vision-impaired users and the screen readers that they use.
* (Memo) <i>column</i>	<p>If this column is displayed (using the Options dialog), an asterisk (*) indicates that a comment or additional information was saved for the indicated agent and schedule day.</p> <p>Double-click a column cell to view or edit the memo.</p>
[Timesteps] <i>column</i>	<p>These columns indicate the agent's schedule items in each timestep. To see greater detail, clear the Full-Day View check and/or resize the columns.</p> <p>To make changes to one agent's schedule at a time, right-click the timestep that you want to modify and then select the command from the shortcut menu. See Modify Individual Agent's Schedules for instructions and explanations.</p>
[Horizontal scroll bar]	Appears below the table when clearing the Full-Day View check box causes some timesteps to be hidden offscreen. Scroll it to the right to display later timesteps.
Legend	Indicates the particular type of schedule item that each bar color represents.

Details field

When you click an agent's row, this field lists the agent's scheduled activities on the selected day. It displays only what fits in one line: additional information does not appear.

Customizing the grid

You can display more timesteps by resizing some columns to the left of the table. For details, see [Getting Started](#).

Finding agents

To find a specific agent in the **Scenario Intra-Day** view:








1. Use the **Find Agent** dialog box to search the table for particular agents. To open it, select **Find** from the **Edit** menu or press [Ctrl] + F.
The Find Agent dialog box opens.
2. Search by first or last name. Enter part or all of the agent's name and then click **OK**.
3. The **Intra-Day** view display shifts to display the table row for the selected agent.

Toolbar: Modifying multiple agents' schedules

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu) to modify multiple agents' schedules at once, to further customize the displayed table, or to modify the selected scenario:

Icon	Name	Description
	Publish	Opens the Publish Schedule Wizard, where you can publish a portion of the selected scenario to the Master Schedule , or extract a portion of the Master Schedule to the selected scenario.
	Add/Remove scenario elements	Opens the Add/Remove Scenario Elements Wizard, where you can add or remove activities and agents for the current schedule scenario.
	Build schedule	Opens the Schedule Build Wizard, where you can build a complete schedule for the selected site.

Icon	Name	Description
	Rebuild schedule	Opens the Schedule Rebuild Wizard, where you can rebuild agent schedules, while optionally leaving intact any agent schedules that you have modified since the last build/rebuild.
	Rebuild intra-day schedule	Opens the Intra-Day Schedule Rebuild Wizard to rebuild an Intra-Day schedule for a specific day or time period for a site, team, or agent.
	Validate schedule	Opens the Review Messages window, which lists schedule warnings that the server returns for a selected site.
	Close	Closes the open scenario (and prompts you to save unsaved data).
	Options	Opens the Options dialog. Enables you to customize the view, including whether to show agent availability, whether to use a 24-hour or 36-hour display, whether to display performance data, and whether to display or hide the Site Name, Shared Transport, Overtime, Paid Hours, Total Hours, Start Time , and Comment columns.
	Filter	Enables you to filter the displayed schedule information. See Schedule filter.
	Sort	Enables you to sort the table.
	Auto-Commit	The Auto-Commit toolbar button toggles on and off the auto-commit feature. The feature is also turned on and off by selecting Auto-Commit on the Actions menu. If it is on, changes are immediately applied to the scenario. If it is off, the changes have pending status and can be committed/approved before they are incorporated in the publicly-available version of the schedule scenario.
	Swap	Enables you to swap two agents' schedules.

Icon	Name	Description
	Insert Multiple	Opens the Insert Multiple Wizard, which enables you to insert breaks, meals, exceptions, days off, time off, shifts, marked time, and work sets for multiple agents or teams.
	Delete Multiple	Opens the Delete Multiple Wizard, which enables you to remove multiple items from the scenario at one time.
	Edit Multiple	Opens the Edit Multiple Wizard, which enables you to edit multiple items in the scenario at one time.
	Commit/Rollback Multiple	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes (changes entered when auto-commit was off) into the schedule scenario or to remove them and return the scenario to its former settings.
	Save	Saves any changes that you have made to the current scenario. If the server cannot save all changes, red or yellow icons in the grid's first column indicate the agents for whom you must correct errors or acknowledge warnings.
	Meeting Scheduler	Opens the Meeting Scheduler, which enables you to schedule meetings to a built scenario for selected agents.
	Move to Current Day	Also known as the <i>Today</i> button. Click this button to display data for today.

Tip

- To make detailed scheduled changes for one agent at a time (such as inserting, editing, or deleting the agent's schedule items), see [Modify Individual Agents' Schedules](#).
- If you make schedule changes in the **Intra-Day** view and do not click **Save**, you are prompted to save your changes when you select a different module or view, or when you launch certain wizards or child windows.
- If you change the shift start time or shift end time for an agent who belongs to a shared transport group, you will see a warning message when you save the change.

Displaying the Performance data

Selecting the **Show Performance Data** check box on the **Performance** tab of the Options dialog box adds a chart and a table to the top of the **Scenario Intra-Day** display.

Tip

The table appears only if you clear the **Full-Day View** check box.

To configure the performance data views:

1. Select a target for the performance data by clicking the button next to the **Target:** label.
The Select Target list that appears contains the activities associated with the site selected on the Objects pane, activity groups, and the multi-site activities associated with the current scenario.
2. Select the granularity in which performance data should be presented: **15**, **30**, or **60** minutes.
3. Select the type of data to be displayed in the graph and table.
Schedule coverage appears as a red line on the graph.
4. To configure the graph, select a value from the **Chart Type** drop-down list:
 - **Calculated** (default)
 - **Required**
 - **Advanced** (both **Calculated** and **Required**)

The table always displays values for schedule coverage and calculated staffing. It might show additional figures, depending on your selections on the Performance tab of the Options dialog box.

If you are not using automatic updates, click **Refresh Performance Data**  to update the performance data view. You can select **Update Automatically** on the **Performance** tab of the **Options** dialog box.

The **Multi-Skill Enabled** label appears on the right-side of the **Performance Data display** only if this feature is enabled. Ask your Genesys Professional Services representative for assistance if you want to use this feature.