Workforce Management Web for Supervisors (Classic) Help

Scenario Weekly View

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Open the view to display a summary table of total paid hours, working start/end times, or shift names.
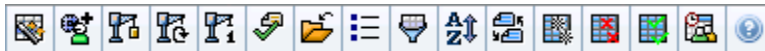
Related documentation:

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The table in the **Scenario Weekly** view shows information for a selected scenario, and for selected agents and/or profiles.

You can select agents under different sites at the same time, but all sites must be within a single business unit.

The toolbar at the top of this view is shown here. See the button descriptions below.

The **Scenario Weekly** view also enables you to see summary tables of total paid hours, working start/end times, or shift names for your schedule planning period. See Mode for details.

Displaying the view

To display the Scenarios 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 appears.

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, as a menu.

To display the open **Scenarios Weekly** view:

1. From the **scenario_name** menu on the toolbar, select **Weekly**.

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.
   You can expand business units to display their sites and expand sites to display their teams and agents. You can select multiple sites, teams, and agents, but only one business unit. If profile agents were created for this site during schedule building, these profiles appear within a Profiles team.

3. Click **Get data** to populate the **Weekly** view table for the selected agents.

Using the table

The **Weekly** view table contains rows for each agent or profile that you selected in the **Objects** tree. (If a scroll bar is displayed to the right, you can use it to reveal more agents.)

This table includes the following columns:

[Expand/Collapse]	If in Planning Period mode, the first column provides expand/collapse controls that you use to display or hide each agent's or profile's weekly schedule details.
Team	This column lists each agent's or profile's team.
Agent	Two columns show an icon representing this agent's or profile's contract, and then the agent's or profile's name.
[Week Start Dates]	In Planning Period mode, when you display agent details, the rows below each agent's or profile's name indicate the start date for each week in the scenario.
[Weekdays]	These cells show agent schedule information for each weekday, for each week in the scenario. The cells' contents correspond to your selection from the Show Data for drop-down list. If the agent is not scheduled for a shift, the cell contains **Day Off**, the name of a full-day time-off type, **shift>** (for scheduled working hours without a shift), or an exception name (for scheduled full-day exceptions). An icon in the cell for a weekday indicates whether the schedule has been changed for that agent. • If the agent's schedule for that day was assigned during scheduling or rescheduling, no icon appears. • If the agent's day was edited after scheduling or rescheduling, a light-gray pencil icon appears. • If the agent's day was assigned by trading or swapping, the swap icon appears. • A **Yield** icon (upside-down red triangle) appears if there are pending changes that have not yet been committed to the scenario. If there have been multiple changes, the icon represents the most recent status.
Weekly Totals	Shows each agent's or profile's total paid hours for the displayed week.
Long (Planning) Period Totals	Shows each agent's or profile's total paid hours for the schedule planning period. This period's duration and start date are set in the **Policies > Contracts > Site Settings** tab.

The **Weekly Totals** and **Period Totals** boxes below the table show a grand total of the paid hours for all selected agents for the weekly or planning period, respectively.

If you specified the **Week Start Day** setting in the Business units properties, the first weekday becomes the week start day. Otherwise, the first weekday is the one specified in your operating system's regional settings.

Customizing the view

To customize the table **Scenario Weekly** view, use these controls at the top of the working pane:

Show data for

From this drop-down list, select what you want to be displayed inside each day's table cell:

Total Paid Hours	Total paid time for the day.
Start/End Times	Start and end times of agents' work.
Shift or **Schedule State Names**	Names of agents' assigned shifts and other full-day states.

Mode

Select one **Week** or **Planning Period** from the **Mode** drop-down list. The table displays data for the selected period. If no schedule planning period was configured or if more than one site is selected on the **Object** pane, then the **Planning Period** option is disabled.

Planning Period mode

The **Scenario Planning Period** mode displays schedules for the entire planning period, even if the scenario range is shorter than the number of weeks in your planning period or if the scenario's date range falls on the boundary between two different planning periods.

In these cases, different shades of white and gray indicate the type of date range that you are viewing.

Planning period color legend:

- **White**—Indicates dates that fall within both the scenario period and the planning period.
- **Light Gray**—Indicates dates that fall within the scenario period but are outside the planning period.
- **Gray**—Indicates dates that fall outside the scenario period but are within the planning period.
- **Dark Gray**—Indicates dates that are outside both the scenario and the planning period.

Filter and sort the schedule data

You can use the following buttons on the **Actions** toolbar (these commands also appear in the

Actions menu) to further customize the displayed table:

Options	Opens the Options dialog. Enables you to customize the view by including the **Agent Rank** and **Site Name** columns.
Filter	Enables you to filter the displayed information by activities and contract types. (If you set a new filter, this immediately refreshes the view.)
Sort	Opens the Sorting dialog, which allows sorting by name, owner, sharing, time of creation, time of last modification, scenario start date, or scenario end date. You can sort in ascending or descending order.

Finding agents

To find a specific agent in the **Scenario Weekly** view:

1. To search the table for particular agents, select **Find** from the **Edit** menu or press Ctrl + F.
   The Find Agents dialog opens. You can search by first or last name.

2. Enter part or all of the agent's name, and then click **OK**.
   The Weekly view display shifts to display the table row for the selected agent.

Toolbar: Modifying the schedule

You can use the following buttons on the **Actions** toolbar (or on the **Actions** menu) to modify the displayed schedule 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 schedule elements	Opens the Add/Remove Scenario Elements Wizard, where you can add activities, and add or remove agents, for the current schedule scenario.
	Build schedule	Opens the Schedule Build Wizard, which builds a complete schedule for the selected site.
	Rebuild schedule	Opens the Schedule Rebuild Wizard, where you can modify

Icon	Name	Description
		and rebuild schedules, while optionally leaving intact any agent schedules that you have edited since the last build/rebuild.
	Re-build 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 scheduling warnings for a selected site. Warnings will only be visible if you have built a schedule for this scenario already, and you chose to save any warnings that were generated.
	Close	Closes the open scenario (and prompts you to save unsaved data).
	Options	Opens the Options dialog box. Enables you to select/de-select the Agent Rank and Site Name columns.
	Filter	Opens the Filter dialog. Enables you to filter the displayed information according to activities and contract types. (If you set a new filter, this immediately refreshes the view.)
	Sort	Opens the Sorting dialog. Here you can sort schedules by Site name, Team Name, Contract, Agent Name (first or last), or Agent Rank. You can then sort agents by First name or Last name, and you can sort the entire list by ascending or descending order. Tip **Agent Rank** sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank.
	Swap	Opens the Swap Agent Schedules Wizard window, which enables you to swap two agents' schedules.
	Insert Multiple	Opens the Insert Multiple Wizard, which enables you to add

Icon	Name	Description
		multiple items to the scenario at one time.
	Delete Multiple	Opens the Delete Multiple Wizard, which enables you to remove multiple items from the scenario at one time.
	Commit/Rollback Multiple	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes into the schedule scenario or to remove them and return the scenario to its former settings.
	Meeting Scheduler	Opens the Meeting Scheduler, which enables you to schedule meetings to already built scenarios for selected agents.

Options dialog

Use the **Options** dialog to configure the data that is shown on the **Weekly** view or **Master Weekly** view.

Open the **Options** dialog by clicking **Options** in the **Actions** toolbar or selecting **Options** in the **Actions** menu.

To configure options on the **Options** tab:

- Select the **Show agents with granted and scheduled rotating pattern or any other calendar preference** check box.

  When the check box is selected, the grid shows the schedule days that contain such an item. A red check box and **Agent** icon appears in the leftmost 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 one of his or her preferences, or a schedule from a rotating pattern, then the icon will not be displayed.

To configure options on the **Columns** tab:

- Select **Agent Rank** to add a column to the **Weekly View** grid that displays an agent's **Rank value**.

- Select **Site Name** to display the **Site** column.

Schedule filter

Applies to these modules: **Weekly**, **Intra-Day**, **State Group Totals**, **Profiles/Bidding**.

Use the **Filter** dialog box to control the activities and contracts that are displayed within the selected site:

1. In any of these views— **Weekly**, **Intra-day**, **State Group Totals**, or **Profiles/Bidding**—click the **Filter** button on the **Actions** toolbar.
   The **Filter** dialog box opens.

2. Click the **Agent Properties** tab.

3. In the **Contracts** list, select the check boxes for contracts that you want to display, from a tree of BUs, sites, and contracts. Clear the check boxes for contracts that you want to hide.

   By default, all contracts are selected.

4. Select or clear the check box **Include agents with matching secondary skills**, to specify that the main view includes agents who also match according to their secondary skills and activities.

   > **Tip**
   > This check box is not available from the **Schedule State Group Totals** view.

5. Click the **Schedule States** tab.

6. To filter agents that will be displayed within the selected site:

   - If you are in the **Weekly**, **Intra-Day**, or **Profiles/Bidding** module, select **Filter Using Following Schedule States** and then, select one (or all four schedule states: **Activities**, **Meetings**, **Marked Time**, and **Shifts**). Each portion of this tree includes the current business unit, site(s), and the appropriate objects (activities, meetings, marked times, or shifts).

   - If you are in the **State Group Totals** module, this tab contains the **Schedule State Groups** list. Select the check boxes for groups that you want to display. Clear the check boxes for any groups that you want to hide. By default, all objects are selected.

7. Select the check boxes for objects that you want to display. Clear the check boxes for objects that you want to hide.

8. Click **OK**.

The view is now filtered according to your selection. If you have filtered a scenario view, this filter remains in effect until you close the scenario. However, if you select another site and then click the **Filter** button, the **Filter** dialog box reopens with its default settings.

Sorting dialog

Use the **Sorting** dialog to sort the Weekly, Intra-Day, and Profile/Bidding views, as follows:

1. Select the item by which you want to sort. **Agent Name** is the default sort option.
   If agents do not have the option by which you are sorting, they appear last in the list.

2. Click **Apply**.
   The view is now sorted by the item that you selected. WFM retains this sort order until you close the scenario.

Here is the sorting criteria for each view:

- **Weekly view**—Team Name, Contract, Agent Name (first or last), Agent Rank, or Site Name. You can sort in ascending or descending order. Note that **Agent Rank** sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank.

- **Intra-Day view**—Site, Team, Contract, Agent (first or last), Shared Transport, Overtime, Paid Hours, Total Hours, Shift Start Time, Shift End Time, Shift, Start Time of First Exception.

- **Profile/Bidding view**—Site Name, Team Name, Agent Name (first or last), and Contract.

Important

If you select **Start Time of First Exception**, agents with full-day exceptions appear after agents with part-day exceptions. Agents with no exceptions appear at the bottom of the list.