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Workforce Management Web for Supervisors (Classic) Help

Shared Transport

10/19/2024

Contents

- [1 Opening and using the view](#)
- [2 Using the toolbar](#)
- [3 Shared transport tab settings](#)
 - [3.1 Properties tab](#)
 - [3.2 Participants tab](#)
 - [3.3 Join Requests tab](#)
- [4 Managing shared transport](#)
 - [4.1 Creating shared transport](#)
 - [4.2 Deleting shared transport](#)
 - [4.3 Adding participants](#)
 - [4.4 Copying shared transport](#)
 - [4.5 Managing Join requests](#)
- [5 Filtering agents and teams](#)
 - [5.1 Filtering agents](#)
 - [5.2 Filtering teams](#)
 - [5.3 Viewing and removing filters](#)



- Supervisor

Create and manage shared transport.

Related documentation:

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Use the **Shared Transport** view to manage shared transport by creating, updating, copying, and deleting them, and by approving or declining join requests.

Tip

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

Opening and using the view

Open the **Shared Transport** view in one of two ways:

1. At the opening display of all WFM Web views, beneath **Configuration**, select **Shared Transport**
2. Select the **Configuration** tab, click **Configuration**, and then select **Shared Transport** from the drop-down menu.

Use the Shared Transport view in one of two ways:

1. In the **Object** pane, select a site.
2. The **Shared Transport** pane lists all shared transport groups that are associated with your selection. The list displays one shared transport group per row, with these columns:
 - **Shared Transport**—Name of the shared transport group.
 - **Status—Open or Closed.**
 - **Comments**—Descriptive comments (if any) for the shared transport group.
 - **Size**—Number of agents who are participating in the shared transport group. This number could be higher than the number of visible participants if you do not have security permissions to view all participants.
 - **Bus**—A selected check box indicates that this shared transport group is the company bus. (To designate a shared transport group as the bus, select the **Shared Transport Properties** tab and then select the **This is the Bus** check box.)
3. Select a single existing **Shared Transport** in the list, to highlight its row and open its Properties tab.






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- Optional: Use the **Options** dialog box to add the **Shared Transport Groups** column to the grid columns table in the **Master Schedule Intra-Day** view. This column displays the shared transport group participation for each agent on the selected day.
 - Optional: Use the **Options** dialog box in the **Scenario Intra-Day** and **Agent Extended** views to add the following columns: **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, and **Comments**.

Important

If you change the shift start time or shift end time for an agent who belongs to a shared transport group, a warning message appears, in the Master Schedule Intra-Day and Scenario Intra-Day views, and when you are modifying individual agents' schedules.

Using the toolbar


The toolbar above the **Shared Transport** pane contains the following controls:


-  **New**—Creates a new shared transport, which begins by opening the Properties tab.
-  **Delete**—Removes the selected shared transport. This command cannot be undone. A confirmation dialog box allows you to cancel or continue. This command is not enabled if the shared transport contains one or more agents who are not visible to the current user (because of a lack of permissions).
-  **Copy**—Opens the **Copy Shared Transport** pane.
-  **Filter**—Filters the shared transport list by agent or team.
-  **Sort**—Sorts the shared transport list in ascending or descending order. (You can also click the **Shared Transport** column header to sort the list.)

This pane also includes Search and contextual Help features.

Shared transport tab settings

After clicking **New**  or selecting an existing shared transport, you configure settings on three tabs in the Shared Transport view: Properties tab, Participants tab, Join Requests tab

At the top of these tabs, click the **Save**  to save the shared transport settings in a particular tab.

Click Help  to open the the Supervisors Help




Properties tab

Use these controls when you are creating or updating shared transport:

- **Shared Transport Name** *field*—Edit the name of the shared transport.
- **Shared Transport Status** *radio buttons*—Select **Open** or **Closed**.
- **This is the bus** *check box*—Designate this shared transport as the company bus or clear to remove that designation.
- **Maximum Size** *field*—Enter or select the maximum number of bus riders for this shared transport. Enabled only if the **This is the bus** check box is selected (use only if this shared transport is a bus).
- **Comments** *field*—Enter or edit the comment text.

Participants tab





Use these controls when you are adding participants to the shared transport:

-  **Add Agents**—Enables you to add agents to the **Participants** list, by opening a list of available agents.
-  **Remove Agents**—Removes selected agents from the **Participants** list. This action cannot be undone.
-  **Sort**—Sorts the participants list by **First Name**, **Last Name**, or **Team**.

The **Participants** tab also displays three columns: **First Name**, **Last Name**, and **Team** name of the participants in the selected shared transport.



List of Available Agents

The **Available Agents** pane contains the following fields and controls:


-  **Search** *field*—Enables you to enter criteria, used to search for available agents.
 - **Search by:** *radio buttons*—Enables you to search for available agents by **First Name** or **Last Name**.
-  **Apply**—Applies the agents you select from the **Available Agents** list to the **Participants** list.
-  **Close**—Closes the **Available Agents** pane without applying any selections.
-  **Sort**—Sort the available agents by **First Name**, **Last Name**, or **Team**.

Join Requests tab

Use these controls and columns when you are managing join requests:

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-  **Approve**—When clicked, approves the selected requests.
 -  **Decline**—When clicked, declines the selected requests.

Description of columns:

-  **Pending icon**—Shows the question mark icon (pending) until the request is approved or declined (see above) and then the icon changes accordingly.
- **Agent**—Name of the agent who made this request to join the shared transport.
- **Site**—Site of the agent who made this request to join the shared transport.
- **Team**—Team of the agent who made this request to join the shared transport.
- **Comments**—Shows any comments that relate to the **Join Request**.



Managing shared transport

Use the procedures in this topic to configure and add participants to Shared Transport, and manage requests to join. You can create, delete, copy, and add participants to shared transport, and approve or decline join requests.

Creating shared transport

[Link to video](#)

To create shared transport:

1. In the **Objects** pane, select the site for the shared transport.
2. In the **Shared Transport** pane, click **New** .
3. When the Properties tab opens, enter the shared transport **Name**, **Status**, **Maximum Size**, and **Comments**.
4. If the mode of transport is a bus, check **This is the bus**.
5. Click **Save** .
You can now add participants to the shared transport.

Deleting shared transport

To delete shared transport:

1. In the **Shared Transport** pane, select the shared transport you want to delete.

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2. Click **Delete** .
When the Confirmation dialog opens click Yes to proceed or No to cancel the action.



Important

Be cautious when deleting items, as this action cannot be undone.

Adding participants

[Link to video](#)




To add participants to shared transport:

1. In the **Shared Transport** pane, select a shared transport and click the Participants tab.
2. Click **Add Agents** .
3. From the Available Agents list, select one or more agents.
You cannot exceed the maximum size that you set in the Properties pane.
4. Click **Apply** .

Copying shared transport

[Link to video](#)

To copy shared transport:





1. In the **Shared Transport** pane, select the shared transport you want to copy.
2. Click **Copy** .
3. When the **Copy Shared Transport** pane opens, change the name for the new shared transport.
4. If desired, check the **Copy to the same Site** check box.
Otherwise, associate a different site by expanding the Enterprise list to select a different Site.
5. Click **Apply** , and then **Save** .

You can also **Close**  the **Copy Shared Transport** pane without applying your selections.

Managing Join requests


[Link to video](#)

To approve or decline shared transport Join requests:

1. Click a shared transport that you know has pending Join requests.
2. Click the Join Requests tab.
3. From the **Join Requests** list, select a request with a pending status .
4. Click either **Approve**  or **Decline** .
The pending column shows a check mark (✓) or an X, depending on your choice.
5. Click **Save** .

Filtering agents and teams




Filter a list of agents or teams using the **Configuration > Shared Transport** view.




When you have large numbers of agents and teams, you might want to use the **Filter**  (found at the top of the Shared Transport and Meetings panes) to easily and conveniently group them. For example, you might want to filter agents associated with a certain team or site, or to filter teams associated with a certain site.




After you have created one or more filters they appear as bullets above the Shared Transport or Meetings list. If only one item is selected for the filter, the bullet shows the name of that item. If more than one item is selected, the bullet shows the number of items in the filter.

Filtering agents

To create a filter for selected agents:

1. Select a site.
2. Click **Filter** .
When the Agents and Teams tabs appear, the Agents tab is selected by default.
3. Click **Add** .
The Agents pane opens, containing a list of available agents and the following controls
 -  **Search field**—Enables you to enter criteria to quickly find agents in long lists.
 - **Search by:** *radio buttons*—Enable you to search for available agents by **First Name**, **Last Name** or **Employee ID**.









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-  **Apply**—Applies the agents you select from the **Available Agents** list to the **Filtered by Agents** list.
 -  **Close**—Closes the **Available Agents** pane without applying any selections.
 -  **Sort**—Sort the available agents by **First Name**, **Last Name**, **Employee ID**, **Site**, or **Team**.


4. Select one or more agents, and click **Apply**  .
5. In the **Agents** tab, if the filter contains all selected agents, click **Apply** again.
6. To remove an agent from the filter, click **Remove**  before applying the filter.
7. To close this pane without applying any of the selected items, click **Close**  .

Filtering teams

Filtering meetings by Team relies on a notion that all team members are also participants of the meeting, otherwise the meeting is filtered out. Most likely, you will filter meetings by Team when you are trying to find a meeting time that is suitable for the entire team (not just a single member of the team).

To create a filter for selected teams:

1. Select a site.
 2. Click **Filter**  .
When the Agents and Teams tabs appear, select Teams.
 3. Click **Add**  .
The Teams pane opens, containing a list of teams and the following controls
 -  **Apply**—Applies the selected teams to the filter and adds them to the **Filter by Teams** list.
 -  **Close**—Closes the **Teams** pane and does not apply any selections.
 -  **Search field**—Enables you to enter criteria to quickly find teams in long lists.
 -  **Sort**—Sorts the **Teams** list by **Team** or **Site**
 4. Select one or more teams, and click **Apply**  .
 5. In the **Teams** tab, if the filter contains all selected teams, click **Apply** again.
 6. To remove a team from the filter, click **Remove**  before applying the filter.
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7. To close the **Teams** tab without applying any of the selected items, click **Close** .

Viewing and removing filters

The **Filters** appear at the top of the **Shared Transport** list, which now contain only the filtered items. Click any one of the bullets to see the items contained in that filter. For example, in the figure below the **Teams (2)** filter was clicked, which opened the **Teams** tab displaying the items in that filter.

To remove a filter without opening it, click the **X** in the bullet itself.

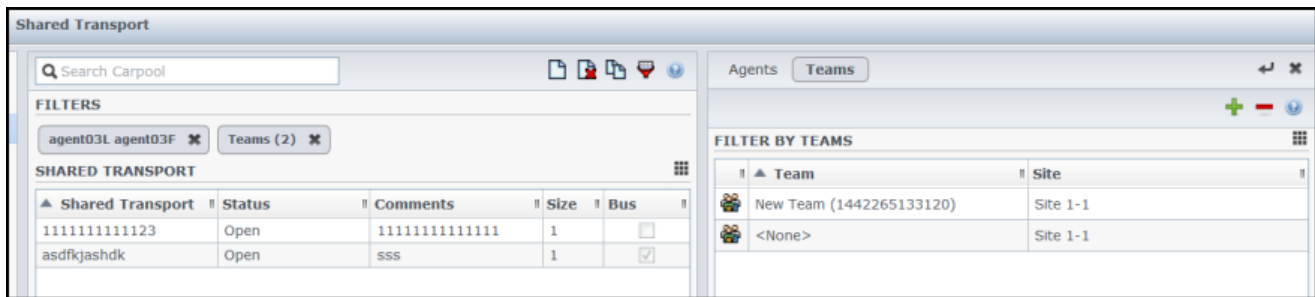


Figure: Filter Bullets in Shared Transport View