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Workforce Management Web for Supervisors (Classic) Help

Swap Agent Schedules Wizard

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- Supervisor

Use the wizard to swap agents' schedules, when necessary.

Related documentation:

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Use the **Swap Agent Schedules Wizard** to swap the schedules of two agents in the same schedule scenario:

1. Click the **Swap** button on the **Actions** toolbar of an Intra-Day, Agent-Extended, or Weekly view.
 - For **Weekly** view, the **Select Date and First Agent** screen opens. Continue with step 2.
 - For **Agent-Extended** or **Intra-Day** view:
 - If you previously selected an agent, the **Select Second Agent** screen opens. Continue with step 5.
 - If you select no agent, the **Select Date and First Agent** screen opens. Continue with step 2.
2. Select the **Start Date** and **End Date**.
These dates must lie within the schedule scenario's date range.
3. From the **Select Agent** list, select the first agent.
In this hierarchical list, you can expand business units to display sites, teams, and agents. You can select a single real or profile agent.
4. Click **Next**.
The Wizard's second screen, Select Second Agent, opens.
5. From the **Select Agent to Swap with** list, select the agent with whom you want to swap schedules.
You can select a single real or profile agent.
6. Click **Finish**.

If the swap is successful, the wizard closes and returns you to the view from which you opened it.

Review swapping messages

After you swap agent schedules, you might receive messages warning you that the swap results in constraint violations. For example, the new shift assignment might violate an agent's **Contract**.

If there are problems, the **Review Messages** dialog box opens. For each issue, the **Review Messages** dialog box shows the name of the affected agent and explains the problem.

After reviewing each entry in the list, do one of the following:

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- Click **Perform Anyway** to make the swap in spite of the constraint violation(s).
 - Click **Cancel** to cancel the swap and return the schedule to its former state.