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Workforce Management Agent Help

Using shared transport

5/7/2025

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Using shared transport

Use the [My Shared Transport](#) and [Browse Shared Transport](#) views to manage your participation in shared transport. You can create your own shared transport or join an existing one. Shared transport can be a company bus or a carpool arranged by a group of agents.

Tip

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

My shared transport

Use this view to create shared transport, view join requests from others, or leave shared transport. You can also switch to the [Browse Shared Transport](#) view if you have not already created a shared transport.

Tip

Creating a new shared transport deletes all of your pending join requests. You can belong to only one shared transport at a time.

Watch this video to see how shared transport management works:


[Link to video](#)

Creating shared transport

The screenshot shows the 'My transport' form with the following fields and annotations:

- My transport** header with a **Browse** button and a **+** icon. An arrow points to the **+** icon with the text: "Click '+' to create new shared transport or 'Browse' to see list of available transports to join".
- Shared transport name:** A text input field containing "Wednesday's commute".
- Status:** A dropdown menu set to "Open".
- Comments:** A text area containing "Let's car pool to save on gas.". An arrow points to this field with the text: "Can only be used by your supervisor.".
- Agents:** A list of agents, with "Ag1 Ag1" selected. An arrow points to this list with the text: "WFM adds you automatically.".
- Save** button: A button with a save icon and the text "Save".

To create shared transport:

1. In the My Shared Transport view, click **Create**  to open a separate view, enabling you to enter the following shared transport details:
 - In the **Shared Transport Name** field, enter the name of the new shared transport.
 - In the **Comments** field, enter descriptive comments, if any.
2. Click **Save**.

After you save the shared transport, two other buttons appear:

- **Leave transport**—Enabling you to leave or cancel this shared transport.
- **Join requests**—Enabling you to view join requests from others for this group.

The shared transport and related information is added as new record in **Browse Shared Transport** table with a status of **Confirmed**. You are automatically added as a participant.

Editing a shared transport group

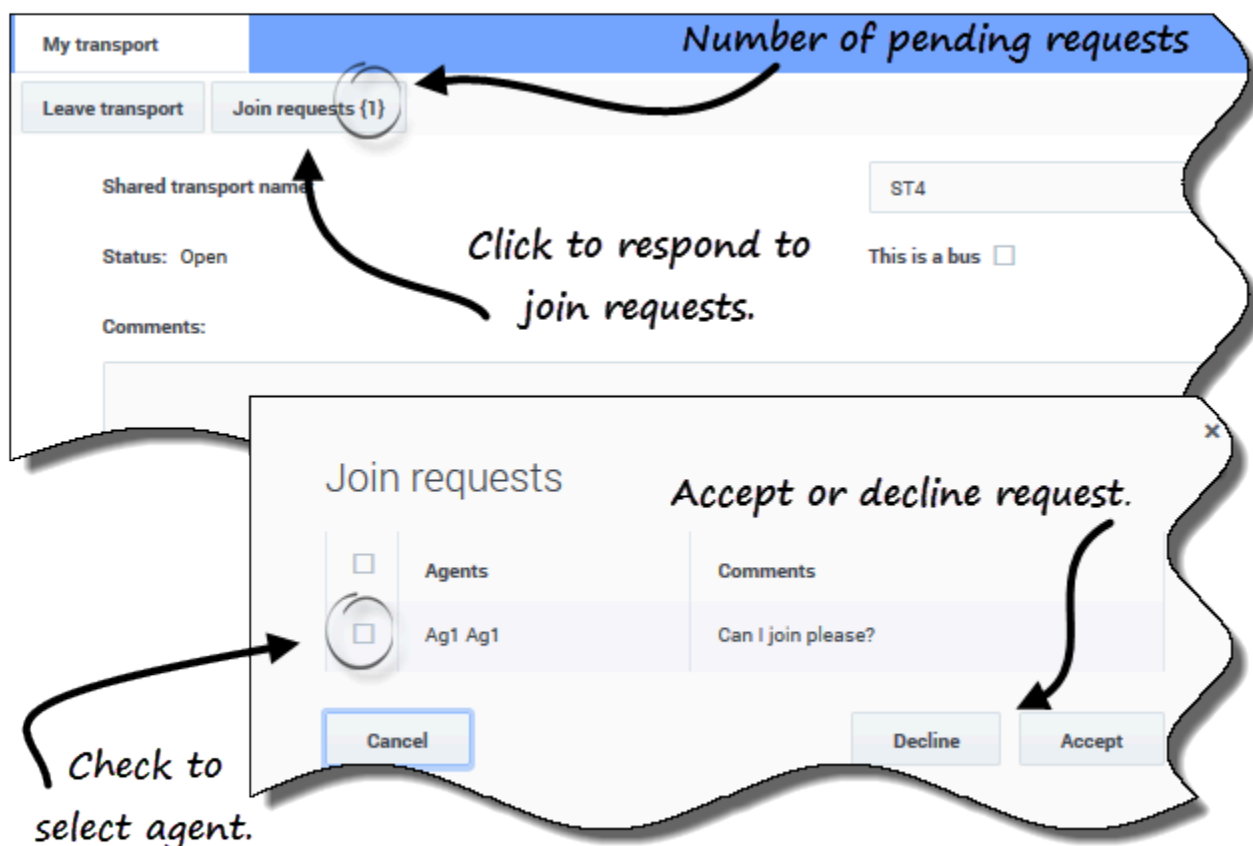
You can change some of the properties in a shared transport that you created, such as the shared transport name or the comments.

To edit shared transport:

1. Click **My Shared Transport**.
2. When the view opens, change the properties, as required.
3. Click **Save**.

Accepting and declining Join requests

If you have created shared transport for carpooling, you will receive requests from other agents to join your group.



To respond to join requests:

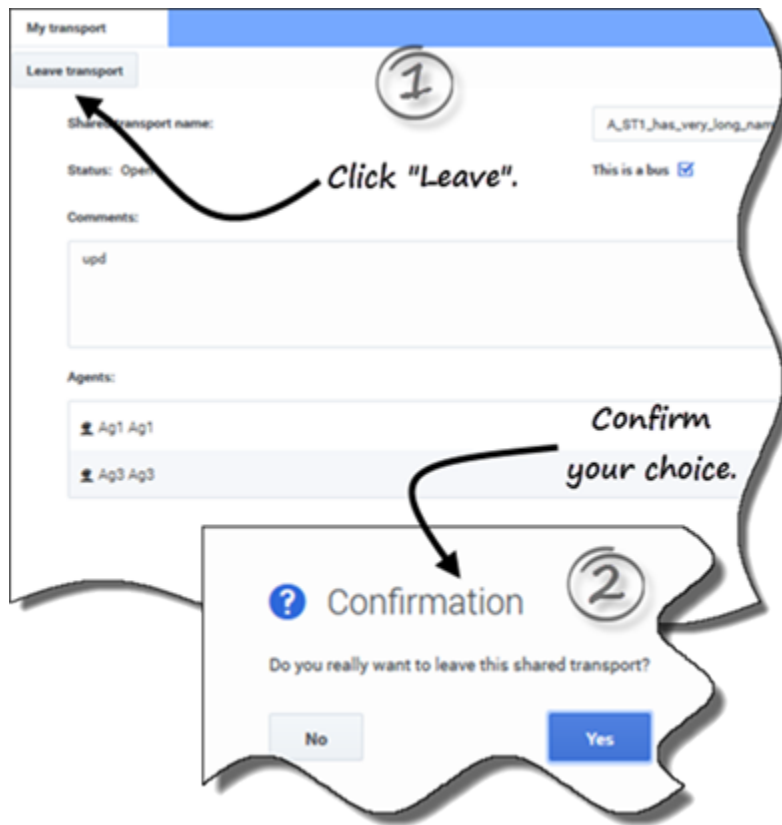
Using shared transport

1. In the My Shared Transport view, click the **Join requests** button.
The number in brackets indicates the number of pending requests.
2. When the **Join Requests** dialog opens, click the check box beside the agent's name.
3. Click **Decline** or **Accept**.

For example:

- You receive requests to join from Agent1 and Agent2.
- You accept Agent1's request and decline Agent2's request.
- Agent1 sees the status **Confirmed** in the Browse Shared Transport view for this transport group; Agent2 sees the status **Declined**.

Leaving shared transport




To leave shared transport:

1. In the My Shared Transport view, click **Leave transport**.
A Confirmation dialog box opens.
2. Click **Yes** to leave the group or **No** to cancel this action and stay in the group.

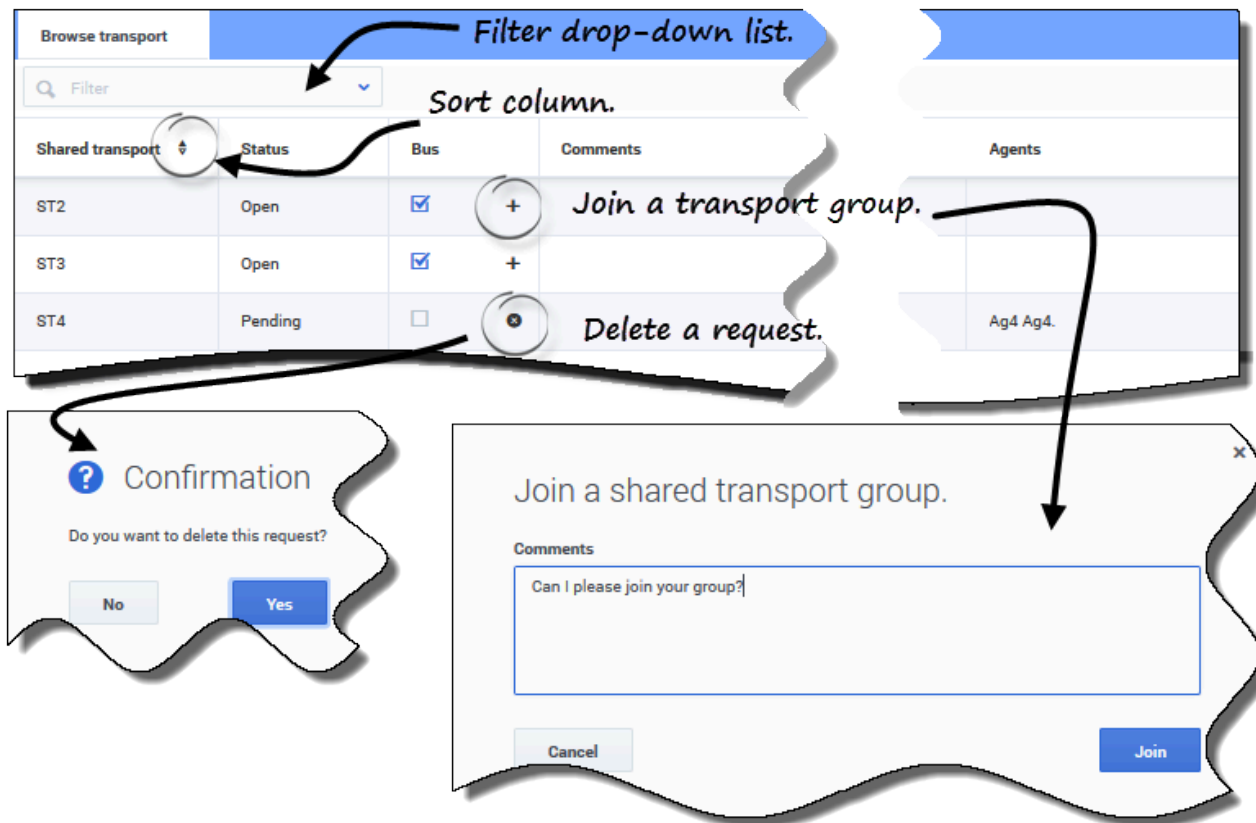
Browsing shared transport

Use the **Browse Shared Transport** view to browse existing shared transport in a table format with these columns and fields:

- **Filter by**—Select Shared Transport Name, Agent's First Name, or Agent's Last Name from this drop-down menu. You can also enter search criteria in this field. Leave this field empty to show all shared transport.
- **Shared transport**—The name of the shared transport. Use the **Sort** controls  to sort this column in ascending or descending order.
- **Status**—The shared transport status (open or closed). An open status indicates that this shared transport is open for new requests. A closed status indicates that it is closed to new requests. **The Status column also contains the status of the agent's join request (confirmed, pending, or declined).**
- **Bus**—When selected, the check boxes in this column specify a bus as the mode of transportation provided by company. (Agents are driven to work by company bus.) Only supervisors can create groups with Bus checked. When unchecked, it means a carpool (created by the agents) is the mode of transportation
- **Actions**—Clicking the icons in this column enables you to join shared transport, leave it, or delete your request to join.
- **Comments**—View comments in this column that are associated with the shared transport.
- **Agents**—This column contains a list of the participants in the shared transport.

Requesting to join shared transport

You can create join requests in the **Browse Transport** view.



To request to join shared transport:

1. In the **Actions** column, click the **Join** icon in the appropriate row.
A Join shared transport dialog opens.
2. In the **Comments** field, enter any comments related to this join request.
3. Click the **Join** button (or click **Cancel** to cancel the action).
The status of this shared transport changes to Pending.

Deleting requests to join

You can delete join requests in the **Browse Transport** view.

To delete join requests (see the figure in [Requesting to join shared transport](#)):

1. In the **Actions** column, click the **Delete** icon in the appropriate row.
A Confirmation dialog opens.
2. Click **Yes** to confirm the deletion or **No** to cancel the action.

You can leave your current shared transport by clicking [Leave transport](#). If you are the only

participant and the shared transport is not a bus, it is removed from the table and you are no longer a participant. If the shared transport has other participants it is not removed from the table.