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Workforce Management Agent Help

[Viewing other schedules](#)

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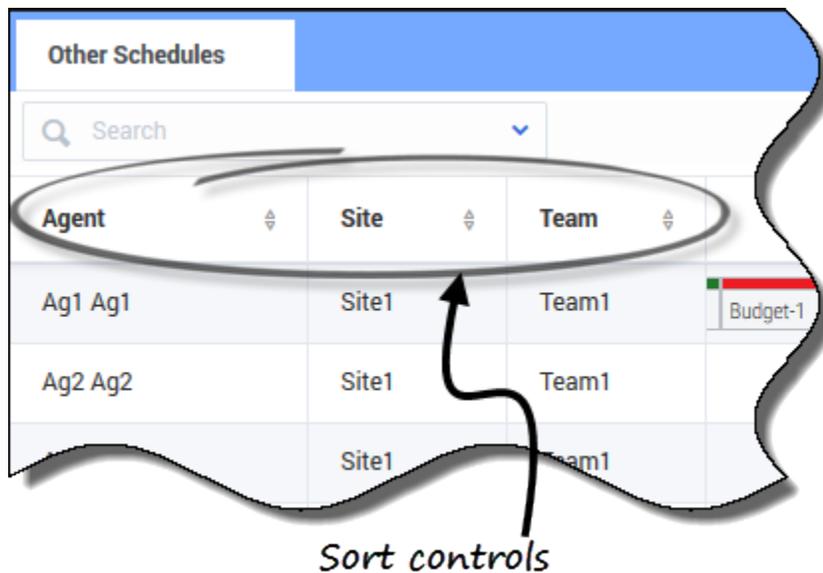
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Viewing other schedules

The **Other Schedules** view displays a filterable, sortable, and searchable grid that lists other agents and their schedules. It has the following columns:

- **Agent**—Displays the name of the agent whose information appears in that row.
- **Site**—Displays the name of the agent's site.
- **Team**—Displays the name of the agent's team.
- Days of the week (one column for each)—Displays the agent's schedule information for that weekday. Click any work item in a specific agent's row to open the **Schedule Details** dialog box which contains all of the details about that particular work item.

Sorting the displayed data



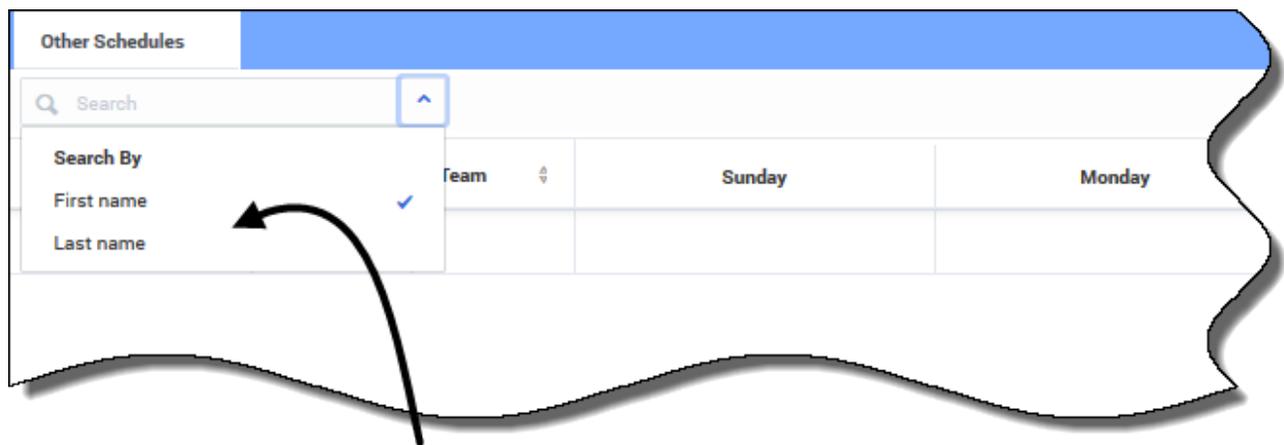
Click the **Agent**, **Site**, or **Team** column header to sort  the data in that column in ascending or descending order.

You can also [use the number keys on your keyboard](#).

Tip

The **Site** and **Team** columns are visible only if you selected them in the **Settings** dialog in this view.

Searching for agents



Make a selection and then enter the name in the search field.

In the **Search** field, use the drop-down menu to search for agents.

- From the drop-down list, select **First name** or **Last name** and enter the agent's name in the search field.

Changing the view settings

Other Schedules Settings

Specify what additional columns or information should be shown on main view

Show Columns

- Site
- Team

Schedule State Labels

- Show start/end times

Schedule States Legend

- Show schedule states legend

Non-tradable items

- Indicate non-tradable items

Close Help OK

Change information that displays in schedules

"Show start/end times" is checked

"Show start/end times" is unchecked

Schedule State Legend

| Agent | Sunday | Monday | Tuesday | Wednesday |
|-------------------|--------------------|--------------------|--------------------|---------------------------|
| AgentF14 AgentL14 | 06:00 A... | 05... | 12... | Full day |
| AgentF13 AgentL13 | 03:00 ... | | | |
| AgentF12 AgentL12 | 12:00 AM-08:00 PM | Full day | 01:30 AM-09:30 PM | 12:00 AM-08:00 PM |
| AgentF11 AgentL11 | 12:00 PM+... | 04:00 PM+12:00 PM | 04:00 PM+12:00 PM | 04:00 PM+12:00 PM Day off |
| AgentF10 AgentL10 | 05:00 PM:... | 08:00 AM-06:00 ... | 08:00 AM-06:00 ... | 08:00 AM-06:00 ... |
| AgentF09 AgentL09 | 12:00 P... | 08:00 AM-06:00 ... | Day off | Day off |
| AgentF08 AgentL08 | 10:0... | 12:3... | Day off | Day off |
| AgentF07 AgentL07 | 10:00 AM... | Full day | | |
| AgentF06 AgentL06 | 12:15 PM-10:15 ... | | | |
| AgentF05 AgentL05 | Full day | | | |
| AgentF04 AgentL04 | 12:4... | Day off | | |
| AgentF03 AgentL03 | | | | |

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Days off Time offs Exceptions Breaks Meals

Special Project Job Training

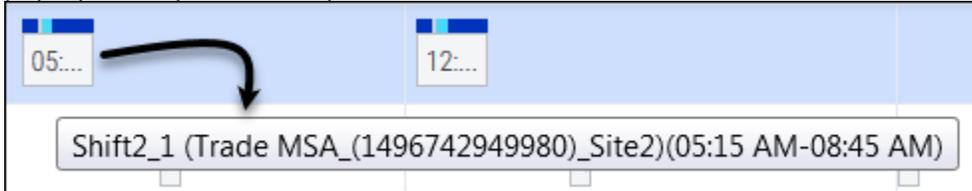
Click **Settings**  to specify what columns or other information to show in schedules. You can choose to:

- Add the **Site** and/or **Team** columns
- Show a legend for **Schedule States**
- **Indicate non-tradable items** in schedules
- **Show start/end times** (displayed, by default) or, if you clear the check box, show item names

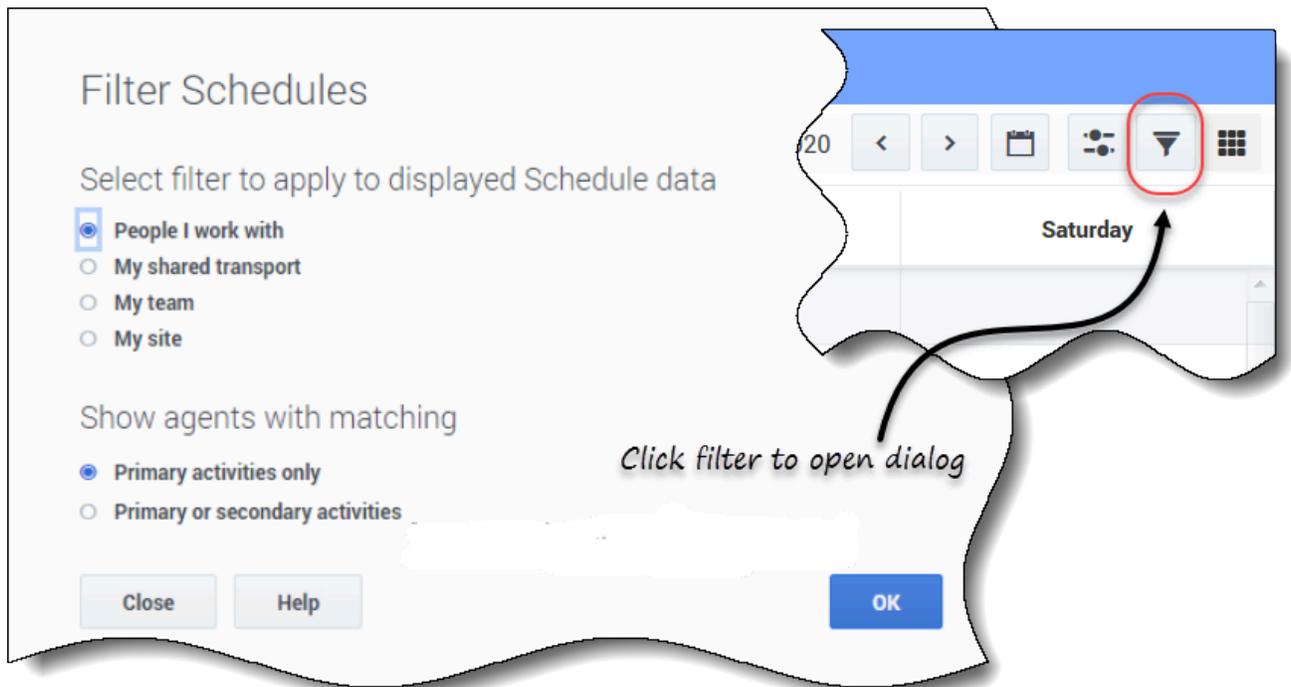
Tip

Full day items display as **Full day** when **Show start/end times** is checked. They display with start/end times if the duration is less than a full day. Day off items are displayed as **Day Off**.

Hover your cursor over truncated items in the schedule to see the information fully displayed in a pop-up tool tip. For example:



Filtering the displayed data



Click **Filter**  to open the dialog box, where you can click the corresponding radio button to limit the display to one of these choices:

Viewing other schedules

- **People I work with** (the default setting)
- **My shared transport** (displayed only if the agent joined any shared transport)
- **My team**
- **My site**
- **My business unit**

Under **Show agents with matching**, select one of two settings:

- **Primary activities only** (the default setting)
- **Primary or secondary activities**

Tip

You will see only the filtering options made available to you by your supervisor or a site administrator. To understand the difference between the **People I work with** and **Primary activities only** filters see [Creating trade proposals](#).

Viewing other agents' schedule details

You can view the schedule details of other agents and create trade proposals in this view. It's as easy as clicking on any weekday column in the row that contains the agent's name to whom you want to propose a trade.

Tip

You might not be able to create trade proposals as described in the topic below. Ask your supervisor if schedule trading is permitted in your contact center.

Viewing schedule details

Agent # Sunday Monday Tuesday

| Agent # | Sunday | Monday | Tuesday |
|-------------|--------------|--------------|--------------|
| a_01 a_01 | | | |
| a0001 a0001 | SHIRO1 (A01) | SHIRO1 (A01) | SHIRO1 (A01) |
| a0002 a0002 | SHIRO1 (A01) | SHIRO1 (A01) | SHIRO1 (A01) |
| a0003 a0003 | SHIRO1 (A01) | SHIRO1 (A01) | SHIRO1 (A01) |
| a0004 a0004 | SHIRO1 (A01) | SHIRO1 (A01) | SHIRO1 (A01) |
| a0005 a0005 | | | |
| a0006 a0006 | | | |

Select a schedule.

Schedule Details

AgentF02 AgentL02
Site1
Team1_1

Tuesday, August 1, 2017
Shift: flexible shift, 02:00 AM – 10:00 AM; Activities: Trade MSA_(1496742949979)_Site1; Paid Hours: 08:00

| Time | Paid | Type | Item name |
|---------------------|-------|---|--|
| 02:00 AM – 10:00 AM | 08:00 | <input checked="" type="checkbox"/> Shift | flexible shift (Trade MSA_(1496742949979)_Site1) |
| 02:00 AM – 10:00 AM | 08:00 | <input checked="" type="checkbox"/> Work | Trade MSA_(1496742949979)_Site1 |

Close this window if you do not want to create a trade

Create trade proposals

This button is enabled only if the Time check box is selected.

To view other agents' schedule details:

1. In the row containing the agent's name with whom you want to trade, click the weekday.
The selected agent's schedule details open for that day.
2. If you want to view the agent's schedule details for more than one day, click the agent's name.
The selected agent's schedule details open for that week.
3. If the dates and times in the schedule details are suitable, **create a trade proposal** for this agent.
4. If you only want to view the details and are satisfied, click **Close**.

Creating the trade proposal

The image shows two overlapping windows from a software application. The top window is titled 'Schedule Details' and displays a table of schedule items for 'Tuesday, June 13, 2017'. The table has columns for 'Time', 'Paid', 'Type', and 'Item name'. A blue checkmark is visible in the 'Time' column of the first row. An arrow points to this checkmark with the text 'Click here to select this shift for a trade.' Below the table, there are 'Close' and 'Help' buttons. The bottom window is titled 'Create trade proposals' and contains the following text: 'Schedule dates selected for the trade: 6/13/17', 'This trade is for: a0002', and a checked checkbox with the label 'Check if you want to manually approve the response to this trade proposal.' Below this is a 'Comments:' text area. At the bottom are 'Cancel', 'Help', and 'Create' buttons. An arrow points to the checkbox with the text 'Click this box if you want a manual response to the proposal.' Another arrow points to the 'Create' button with the text 'Click to create the trade proposal.' A third arrow points to the 'Comments' field with the text 'Add comments applicable to this trade.' To the right of the 'Create trade proposals' window, there is a separate callout box with a blue button labeled 'Create trade proposals' and an arrow pointing to it with the text 'Click to create the trade proposal.'

To create and send a trade proposal to the agent:

1. In the **Schedule Details** window, click the check box near the weekday name.
If you select at least one check box, the Create trade proposals button is enabled. To select all days in the dialog select the top-most check box.
2. Click **Create trade proposals**.
The Create trade proposals window opens.
If applicable, click the Check if you want to manually approve the response to this trade proposal check box.
3. In the **Comments** field, enter any information about this trade that you want the receiving agent or your supervisor to know.
4. Click **Create**.
5. The **My Trades** view opens and the trades is added to your list of trades.