



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

# Workforce Management Web for Supervisors Help

Managing Meetings

---

## Contents

- 1 Managing Meetings
  - 1.1 Creating Meetings
  - 1.2 Adding Participants to Meetings
  - 1.3 Editing Meetings
  - 1.4 Deleting Meetings
  - 1.5 Copying Meetings



# Managing Meetings

Use the procedures in this topic to **create**, **edit**, **delete**, **copy**, and **add participants** to meetings.

## Creating Meetings


### [Link to video](#)

To create a meeting:

1. In the **Policies** module, select **Meetings**.
2. Select a site or business unit (this action selects all indented sites beneath it) on the **Objects** pane.
3. Click **New**  .  
**The Properties tab opens, by default.**
4. Configure the settings, as described in the **Properties**, **Participants**, and **Associated Sites** tabs, as required.
5. Click **Save**  .  
**The new meeting appears in the Meetings pane.**

## Adding Participants to Meetings

To add participants to a meeting:

1. In the **Meetings** pane, select a meeting and then, click the **Participants** tab.
2. Click **Add**  .
3. In the **Available Agents** pane, select one or more agents.

### Tip

You can also **filter**, **sort**, or **search** agents in the list of available agents.

4. Click **Apply**  .

The selected agents move to the **Agents** list in the **Participants** pane.


Alternatively, you can click **Close**  to close the pane without saving your selections.

### Important

- Agents can appear in only one pane at a time.
- Only agents from the meeting site are available for selection.
- When a schedule that includes the meeting time is generated, Scheduler verifies that enough agents are available to satisfy the **Minimum Percentage** requirement and then assigns the meeting exception to the available agents. If too few agents are available, **Scheduler** generates an error message and does not schedule the meeting.


## Editing Meetings

To edit a meeting:

1. In the **Meetings** pane, select the meeting you want to edit.
2. Click any one of the three tabs (**Properties**, **Participants**, or **Associated Sites**) to change its settings.
3. When you are finished making changes, click **Save** .



## Deleting Meetings


To delete a meeting:

1. In the **Meetings** pane, select the meeting you want to delete.
2. Click Delete .
3. When the **Confirmation** dialog opens, select **Yes** to proceed or **No** to cancel the action.  
**If you select Yes, the meeting is deleted and the action cannot be undone.**

## Copying Meetings

To copy a meeting:

1. In the **Meetings** pane, select the meeting you want to copy.
2. Click **Copy**  .
3. When the **Copy Meeting** pane opens, enter a name for the meeting.
4. In the bottom half of the pane, click the **Enterprise** list and select the business unit and site, to which you want to associate this meeting.
5. Click **Apply**  .

**Alternatively, you can click Close  to close this pane and cancel the action. If you do this, the meeting is not copied.**