



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

Meeting Scheduler

12/19/2025

Meeting Scheduler

Use the **Meeting Scheduler Wizard** to schedule a meeting:

1. In the **Schedule** module, select one of these views: **Master Schedule Weekly**, **<schedule> Weekly**, **Master Schedule Intra-day**, **<schedule> Intra-day**.
2. At the top right of the **Work** pane, select the week that you want to schedule the meeting.
3. Click **Meeting Scheduler** .
4. At the **Please select a meeting from the list** page, choose an existing meeting (or decide to create a new one) and enable or disable auto-commit.
If you chose to use an existing meeting, you will see all **Meeting Scheduler** pages except **Meeting Parameters**. Otherwise, you will see only the **Participants** and **Meeting Parameters** pages.
5. At the **Participants** page, choose the agents who should attend (if you are creating a new meeting). if you use an existing meeting, the list of participants is read-only.
6. At the **Dates Range** page, choose the range of dates that are acceptable for the meeting.
7. At the **Meeting Parameters** page, select the meeting type, possible dates, possible times, duration, and minimum percentage of required attendees.
8. A message box appears, listing how many agents were scheduled for the meeting. Click **OK**.
9. If some agents were not scheduled, a message box may appear listing them. Click **OK**.
The meeting is scheduled, and exceptions, representing meeting, are inserted into the schedule.

Meeting Scheduler vs. Meeting Planner

The Meeting Scheduler is best suited for scheduling ad hoc meetings and other meetings that you did not know about when you built the original schedule.

The **Meeting Planner** (available through the **Policies** module) is useful for scheduling pre-planned meetings especially ones that recur, such as weekly team meetings or bi-weekly one-on-one coaching sessions. If you want to edit, copy, or delete meetings, use the **Meeting Planner**.