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Workforce Management Web for Supervisors Help

Meetings

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Meetings

Use the **Meetings** view to **create**, **edit**, **copy**, or **delete** meetings, or to **assign attendees** to meetings.

Important

To configure objects and change settings in the **Meetings** view, you must have the appropriate role privileges. See **Policies Role Privileges**.






Planner vs. Scheduler

Use the **Meeting Planner** (described here) to create and configure meetings that you know about in advance. It is especially useful for recurring team meetings or coaching sessions. Meetings that are created in the **Meeting Planner** are taken as inputs during schedule building.

Use the **Meeting Scheduler** to create ad hoc meetings and insert them into a schedule that has already been built. Access the **Meeting Scheduler** feature in WFM Web Supervisor from within the **Intra-Day Schedule** view or **Agent-Extended Schedule** view.

Meetings Pane

The toolbar above the **Meetings** pane contains the following controls:

 New	Creates a new meeting, which begins by opening the Properties tab .
 Delete	Removes the selected meeting. This command cannot be undone. A Confirmation dialog enables you to cancel or continue. This command is not enabled if the meeting contains one or more agents who are not visible to the current user (because of a lack of permissions).
 Copy	Enables you to copy the selected meeting to create a new one.
 Filter	Filters the Meetings list by agent or team. See Filtering Agents and Teams .
 Sort	Sorts the Meetings list in ascending or descending order. (You can also click the Meetings column header to sort the list.)

This pane also includes a **Search** field and **Help** icon.