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Workforce Management Web for Supervisors Help

Intra-Day Schedule Rebuild Wizard

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Intra-Day Schedule Rebuild Wizard

Use this wizard to rebuild an Intra-Day schedule for multiple days (selected dates or a date range) for a site, team, or an agent. While in a **Schedule Scenario** you can rebuild from any of the following views: Intra-Day, Weekly, Agent Extended, or Profiles/Bidding view.

While in a **Master Schedule** view, you can rebuild from any of the following views: Intra-Day, Weekly, or Agent Extended.

The rebuild process can include any activities and agents defined for this site/day in the selected scenario or Master Schedule.

Reasons for Using This Wizard

The goal of the WFM scheduling algorithm is to minimize the over and under-staffing of agents, against the forecasted staffing requirements. This is the outcome when a schedule is generated. However, several circumstances might cause the schedule to be suboptimal by the time a particular schedule day arrives. For example:

1. You might have reforecasted volumes and staffing for the day.
2. Agents might have called in sick or were given time off.
3. Existing agent schedules might have been manually adjusted.
4. Additional agents might have been added into the schedule.
5. Meetings or other types of exceptions might have been added to the schedule.

Because of this, you may wish to reoptimize the schedule day. It does not make sense to reoptimize days or hours that have already passed. You probably do not want to reoptimize the current hour, since any changes to meals, breaks, and/or work activities would be difficult to communicate to the affected agents. The Intra-day Rebuild wizard allows you to reoptimize specific types of schedule items for selected agents, based on a particular configured start time, which would normally be later than the current time when you invoke the reoptimization.

However, it is important to understand several facts about Intra-Day schedule Rebuild function and be aware of situations such as when a schedule might not be reoptimized or will be impacted by set of limitations.

In a regular schedule build or rebuild, the existing schedule is simply replaced with a new schedule generated. But, a rebuild Intra-Day schedule function works with schedules/shifts that were scheduled to agents by any previous action that tried to modify selected wizard parameters, but couldn't substitute a currently scheduled item with another one. Therefore, the rebuild Intra-Day schedule functionality has a set of limitations that we should consider while using it. For example, the following cannot change by re-optimization:

- Day-Off cannot become Workday
- Workday cannot become Day-Off

- The scheduled shift cannot be changed to a different shift. The start/end time of the same shift can be re-scheduled if the corresponding option was selected. But, the shift cannot be moved if the shift's configuration has a non-flexible window or scheduled activities' open hours prevent different hours.
- Schedule of the day cannot become invalid (paid time, shift start/end). In such cases, the original schedule remains.
- If a scheduled shift is no longer under the current agent's contract, such schedule cannot be Intra-Day re-scheduled.
- If a scheduled shift contains a meal or a break that is no longer assigned to that shift in the current configuration or does not contain a meal that is in the current configuration, it cannot be Intra-Day re-scheduled.
- If the scheduled break/meal duration is different from the current break configuration or the break/meal's paid/unpaid flag is different, the shift cannot be re-scheduled.
- If the agent does not have any schedule for the rescheduled date, then it will stay with no schedule.
- Nothing can be changed before the re-optimization start time.

To use the Intra-Day Schedule Rebuild Wizard:

1. Select a Schedule Scenario or Master Schedule view (**Intra-Day**, **Weekly**, or **Agent Extended**).
2. Click the **Rebuild intra-day schedule** button on the **Actions** toolbar.
3. Complete each screen as it appears, and then click **Next**, or click **Finish** if it is the final screen:
 - **Select Site**
 - **Select Options**
 - **Shared Transport Constraints**
 - **Team Synchronicity**
 - **Select Agents**
 - **Select Activities**

Tip

- The **Select Activities** screen may not appear, depending on your selections at the **Select Options** screen.
- You can always click **Cancel** to discard your selections and close the wizard without making any changes.