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Workforce Management Agent Help

[Schedule](#)

12/17/2025

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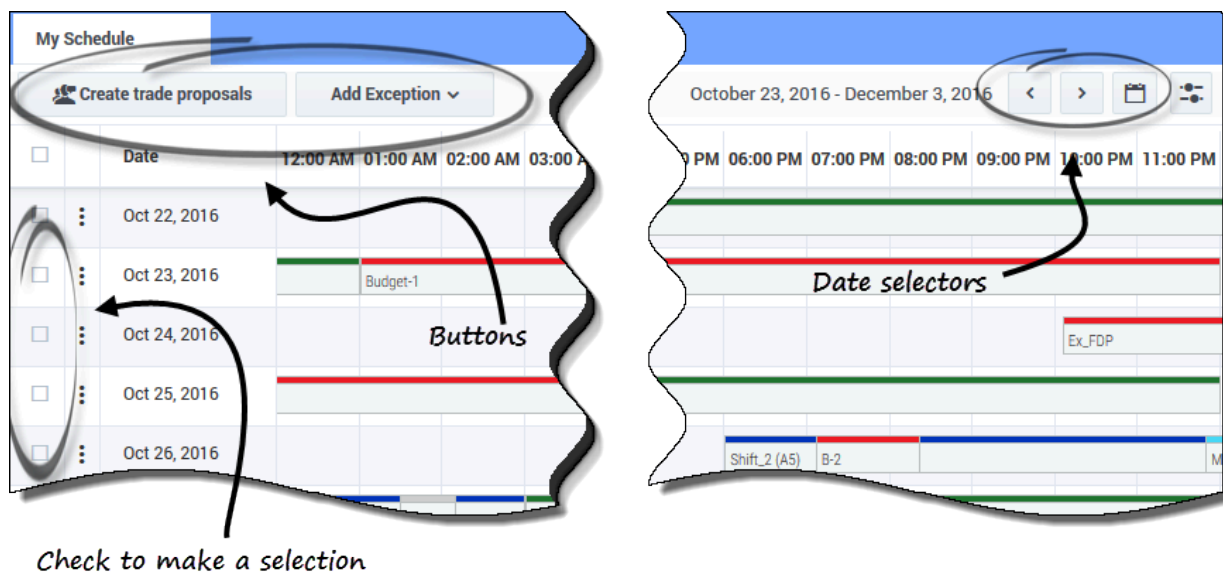
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Schedule

Use the **Schedule** module to view your schedules and its details or view other agents' schedules. Click **Schedule** to reveal the drop-down menu that lists the three views in this module:

- **My Schedule**—Displays your schedule information. To display any single week or multiple weeks, see [Changing the date](#). This view opens by default after you log in, but you can change the default, see [Viewing my settings](#).
- **My Schedule Details**—Displays the current (or selected) week's schedule in detail.
- **Other Schedules**—Displays a filterable, sortable, and searchable list of other agents and their schedules.

Common controls



The **My Schedule** and **My Schedule Details** views have these common controls:

- **Create trade proposals button**—Opens a dialog box that enables you to create new trade proposals for the days that you have selected in this view.
- **Add Exception button**—Opens a dialog box that enables you to add an exception for the day(s) that you have selected in this view.
- **Pending Schedules button**—Works as a toggle, enabling you to view your pending schedules, including exceptions.
- **Date and Calendar icons**—For a description of these controls, see [Changing the Date](#).

- ☐ *check boxes*—Select the check box in the table's first column for each day for which you want to create trade proposals or add exceptions. Then, click [Create Trade Proposals](#) or [Add Exception](#).

Tip

The **Create trade proposals** and **Add Exception** buttons are hidden if this optional functionality is not enabled for you.

My schedule

The **My Schedule** view displays your schedules in a grid that contains a colored bar graph for each scheduled work day. Each bar graph spans the scheduled hours for the work day, displaying shifts, work items, breaks, meals, and days off in the colors that identify them.

Columns and settings

The diagram illustrates the 'My Schedule' view layout and components. It shows a grid of scheduled work days with a colored bar graph for each day. The grid includes columns for the date and time (hours). The bar graphs display shifts, work items, breaks, meals, and days off in the colors that identify them. The diagram also shows a 'Change view settings' button and a 'Paid hours field'.

My Schedule

Buttons: [Create trade proposals](#), [Add Exception](#)

Calendar Range: October 23, 2016 - December 3, 2016

Time Slots: 12:00 AM, 01:00 AM, 02:00 AM, 03:00 AM, ..., 09:00 PM, 10:00 PM, 11:00 PM

Grid Columns: Date, 12:00 AM, 01:00 AM, 02:00 AM, 03:00 AM, ..., 09:00 PM, 10:00 PM, 11:00 PM


Grid Rows: Oct 22, 2016, Oct 23, 2016, Oct 24, 2016, Oct 25, 2016, Oct 26, 2016

Grid Content: Budget-1, Shift_2 (A5), B-2, Ex_FDP

Annotations:

- Date and Hour columns**: Points to the 'Date' and '12:00 AM' columns.
- Bar graphs**: Points to the colored bars representing shifts and work items.
- Change view settings**: Points to the settings icon in the top right corner.
- Paid hours field**: Points to the 'Paid hours' field showing 55:40.

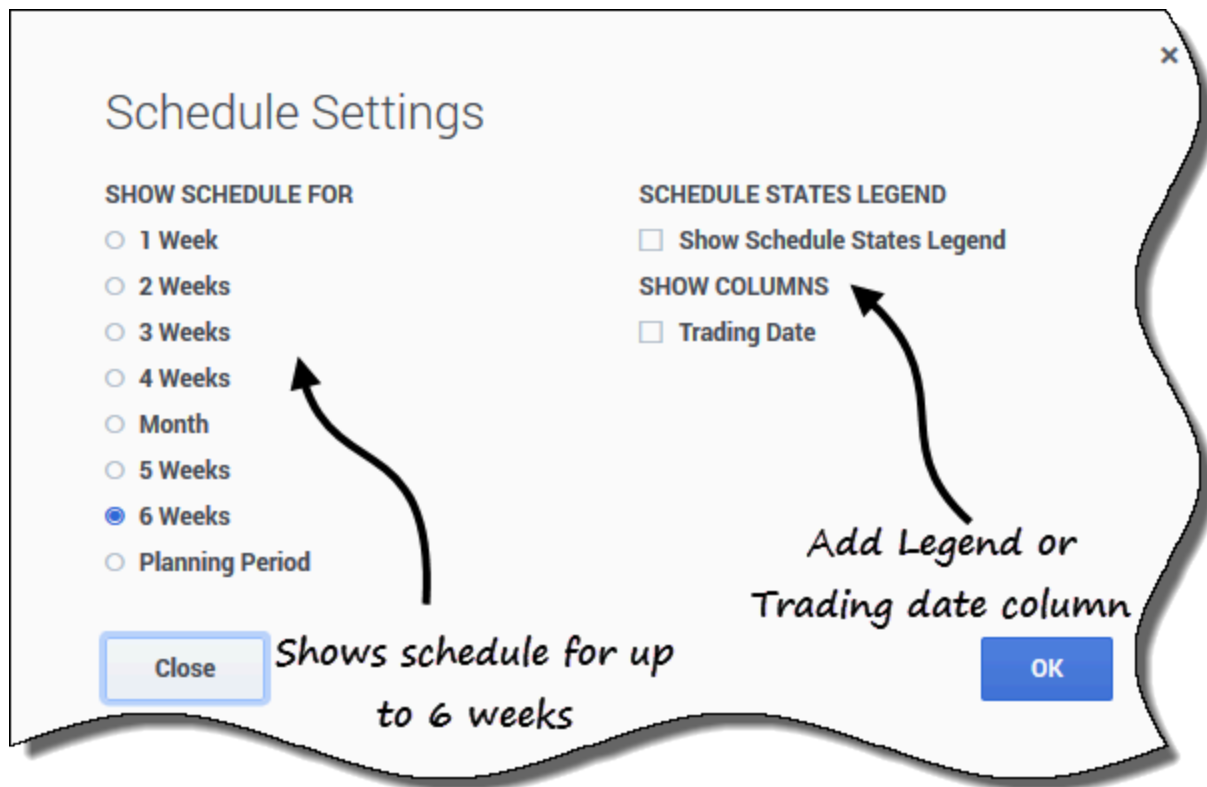
The **My Schedule** view has these additional controls and columns:

- **Settings icon**—Open a dialog box that enables you to change the settings in this view. See [Changing Settings in the Schedule View](#).
-  **Actions column**—Presents a drop-down list, enabling you to roll back any published exceptions you entered and delete pending changes (if any).
- **Date column**—Shows each date in the scheduled work week.
- **Hour columns**—Span an entire day with each column representing one hour in the day.
- **bar graphs**—Display the shifts, work items, breaks, meals, exceptions, and days off and the colors that identify them in the work day hours. Click any colored cell in the bar graph to view the details of that particular item.
- **Paid hours field**—Shows the total paid hours for this schedule period.

Tip

Pending schedules are visible only when there are uncommitted changes in your schedule, such as an **Exception** you inserted that is not yet approved by a supervisor.


Changing the view settings



To change the information that is displayed in the **My Schedule** view:


1. In the upper-right corner of this view, click the **Settings** icon.
The Schedule Settings dialog box opens.
2. In the **Show Schedule For** list, choose one of the following radio buttons:
 - **1 week**
 - **2 weeks**
 - **3 weeks**
 - **4 weeks**
 - **Month**
 - **5 weeks**
 - **6 weeks**
 - **Planning Period**
3. Check the **Show Schedule States Legend** check box if you want to display the legend at the bottom of this view.
4. Check the **Trade Date** check box if you want to display that column in the schedule grid.
5. Click **OK** to display your selections, or **Close** to discard them.

Rolling back schedules

In this view, you can click **Actions**  to open a drop-down list, enabling you to rollback a published schedule. Selecting **Rollback** in the list, rolls back any schedule changes you've made (for example, if an exception was auto committed immediately) and reverts your schedule to the previous state.

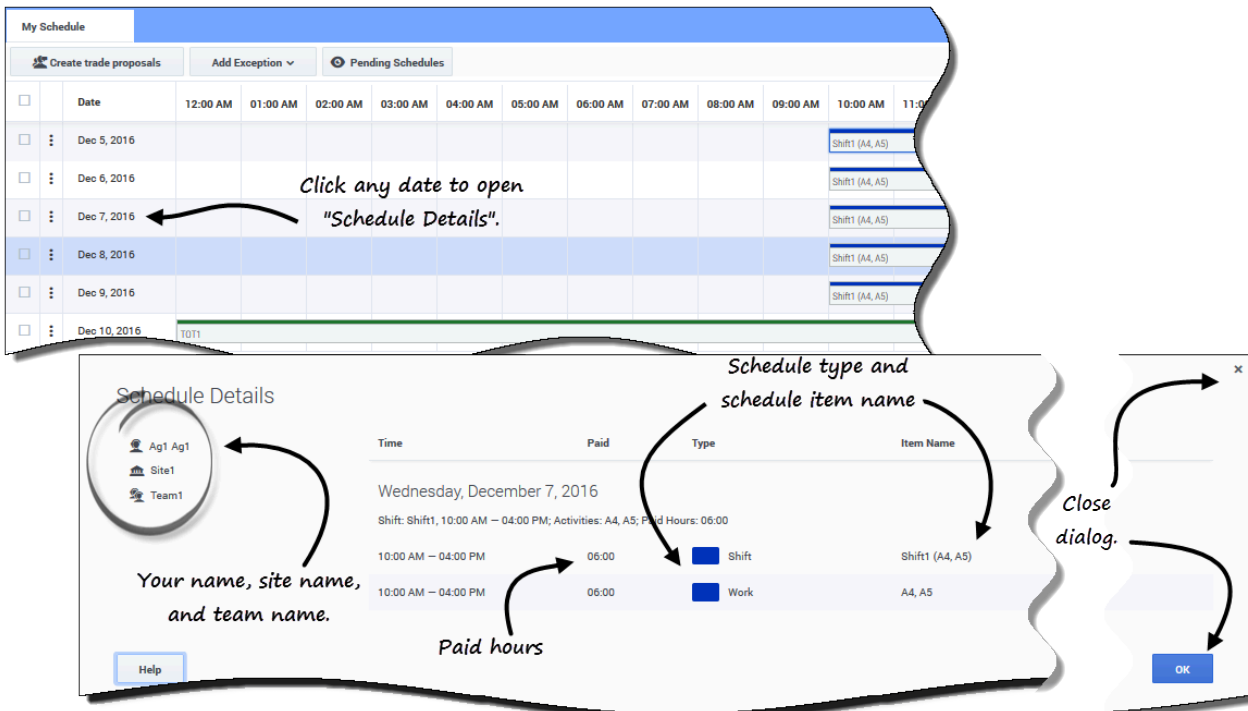
To roll back a schedule, see the procedure in [My Schedule Details](#)

Deleting pending schedules changes

At the top of this view, toggling on the [Pending Schedules](#) button displays changes that are requested but not yet approved. Clicking **Actions** , opens a drop-down list, enabling you to delete pending changes in your schedule that are not yet approved by your supervisor.

To delete pending changes in your schedules, see [My Schedule Details](#)

Opening schedule details for a specific date



The screenshot shows the 'My Schedule' interface. At the top, there are buttons for 'Create trade proposals', 'Add Exception', and 'Pending Schedules'. Below these is a calendar grid for December 2016. An arrow points to the date 'Dec 7, 2016' with the text 'Click any date to open "Schedule Details"'. Below the calendar, a 'Schedule Details' dialog box is open. The dialog box has a header with 'Your name, site name, and team name.' and a 'Help' button. The main content area shows the date 'Wednesday, December 7, 2016' and the shift 'Shift: Shift1, 10:00 AM - 04:00 PM; Activities: A4, A5; Paid Hours: 06:00'. Below this is a table with columns 'Time', 'Paid', 'Type', and 'Item Name'. The table shows two rows: '10:00 AM - 04:00 PM' with '06:00' paid hours, 'Shift' type, and 'Shift1 (A4, A5)' item name. The second row is identical. An arrow points to the 'Paid' column with the text 'Paid hours'. Another arrow points to the 'Type' and 'Item Name' columns with the text 'Schedule type and schedule item name'. On the right side of the dialog box, there is a 'Close dialog.' button and an 'OK' button. An arrow points from the 'Close dialog.' button to the 'OK' button.

Time	Paid	Type	Item Name
10:00 AM - 04:00 PM	06:00	Shift	Shift1 (A4, A5)
10:00 AM - 04:00 PM	06:00	Work	A4, A5

In **My Schedule** view you can open the schedule details for a specific date in a separate dialog, by clicking any date in the **Date** column. The **Schedule Details** dialog opens showing your name, site, and team name, and the following information in columns:

- Time
- Paid (hours)
- Type (of schedule item, color-coded)
- Item Name (schedule item name)

Viewing trade requests

If your site allows **schedule trading**, there might be **Trade requests** button at the top of this view. It alerts you to any open trade proposals or responses and shows the number of unanswered requests in brackets. For example, (2). The button displays only if there are open proposals awaiting your response.

The screenshot shows the 'Workforce Management' interface with the 'Schedule' tab selected. The 'My Schedule' view displays a table with a 'Date' column and time slots from 12:00 AM to 07:00 AM. A 'Trade requests' button with a notification icon (1) is visible. A callout arrow points to the '02:00 AM' slot with the text 'Click to open the trade proposal.'

The 'Unanswered Trade Requests' dialog is open, showing a request from 'AgentF01 AgentL01' for 'Aug 2, 2017'. A callout arrow points to the date with the text 'Click the date to open trade details.'

Date	12:00 AM	01:00 AM	02:00 AM	03:00 AM	04:00 AM	05:00 AM	06:00 AM	07:00 AM
There are no schedules to display for requested period								

To view the trade request:

1. Click **Trade requests**.
The Unanswered Trade Requests dialog box opens, showing the agent who is making the requests, comments about the trade, and the trade proposal date.
2. Click the date.
 - If single-site trading is permitted, the **Trading > Proposals** view opens, enabling you to see trade details and proceed with the proposal.
 - If multi-site trading is permitted, the **Trades** view opens, filtered by **Offered to me**.