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Workforce Management Agent Help

[Viewing other schedules](#)

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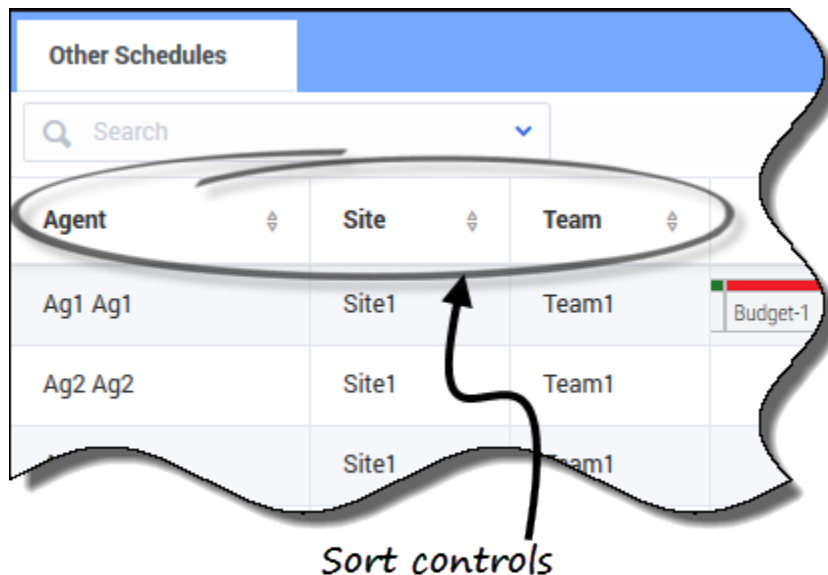
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Viewing other schedules

The **Other Schedules** view displays a filterable, sortable, and searchable grid that lists other agents and their schedules. It has the following columns:

- **Agent**—Displays the name of the agent whose information appears in that row.
- **Site**—Displays the name of the agent's site.
- **Team**—Displays the name of the agent's team.
- Days of the week (one column for each)—Displays the agent's schedule information for that weekday. Click any work item in a specific agent's row to open the **Schedule Details** dialog box which contains all of the details about that particular work item.

Sorting the displayed data



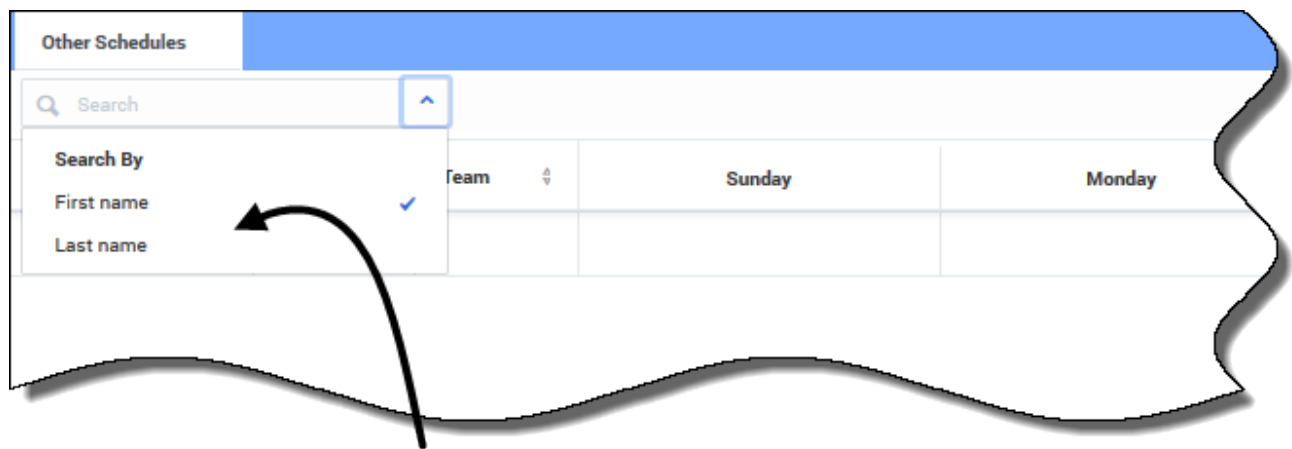
Click the **Agent**, **Site**, or **Team** column header to sort  the data in that column in ascending or descending order.

You can also **use the number keys on your keyboard**.

Tip

The **Site** and **Team** columns are visible only if you selected them in the **Settings** dialog in this view.

Searching for agents



Make a selection and then enter the name in the search field.

In the **Search** field, use the drop-down menu to search for agents.

- From the drop-down list, select **First name** or **Last name** and enter the agent's name in the search field.

Changing the view settings

Other Schedules Settings

Specify what additional columns or information should be shown on main view

Show Columns

- ☒ Site
- ☐ Team

Schedule State Labels

- ☒ Show start/end times

Schedule States Legend

- ☒ Show schedule states legend

Non-tradable items

- ☐ Indicate non-tradable items

Close Help OK

Other Schedules

Search


Agent	Sunday	Monday	Tuesday	Wednesday
AgentF14 AgentL14	06:00 A...	05:...	12:...	Full day
AgentF13 AgentL13	03:00 ...			
AgentF12 AgentL12	12:00 AM-08:00 PM	Full day	01:30 AM-09:30 PM	12:00 AM-08:00 PM
AgentF11 AgentL11	12:00 PM+...	04:00 PM+12:00 PM	04:00 PM+12:00 PM	04:00 PM+12:00 PM
AgentF10 AgentL10		05:00 PM+...	08:00 AM-06:00 ...	08:00 AM-06:00 ...
AgentF09 AgentL09	12:00 P...	08:00 AM-06:00 ...	Day off	Day off
AgentF08 AgentL08	10:0...	12:3...	Day off	Day off
AgentF07 AgentL07	10:00 AM...	Full day		
AgentF06 AgentL06	12:15 PM-10:15 ...			
AgentF05 AgentL05	Full day			
AgentF04 AgentL04	12:4...	Day off		
AgentF03 AgentL03				

Displaying 1 - 14 of 14

Days off Time offs Exceptions Breaks Meals

Special Project Job Training

Schedule State Legend

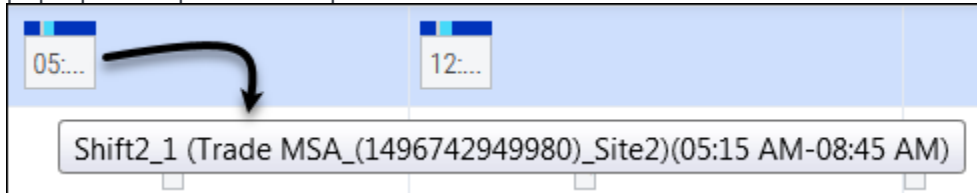
Click **Settings**  to specify what columns or other information to show in schedules. You can choose to:

- Add the **Site** and/or **Team** columns
- Show a legend for **Schedule States**
- **Indicate non-tradable items** in schedules
- **Show start/end times** (displayed, by default) or, if you clear the check box, show item names

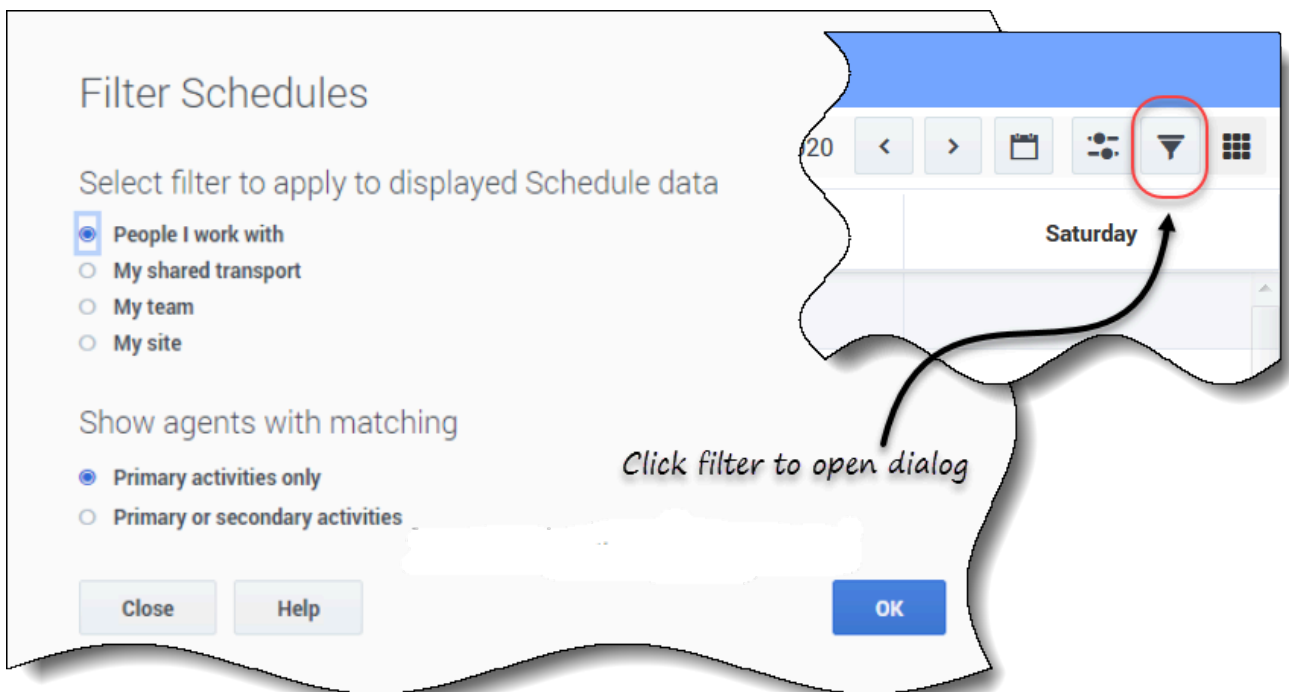
Tip


Full day items display as **Full day** when **Show start/end times** is checked. They display with start/end times if the duration is less than a full day. Day off items are displayed as **Day Off**.

Hover your cursor over truncated items in the schedule to see the information fully displayed in a pop-up tool tip. For example:



Filtering the displayed data



Click **Filter**  to open the dialog box, where you can click the corresponding radio button to limit the display to one of these choices:

- **People I work with** (the default setting)
- **My shared transport** (displayed only if the agent joined any shared transport)
- **My team**
- **My site**
- **My business unit**

Under **Show agents with matching**, select one of two settings:

- **Primary activities only** (the default setting)
- **Primary or secondary activities**

Tip

You will see only the filtering options made available to you by your supervisor or a site administrator. To understand the difference between the **People I work with** and **Primary activities only** filters see [Creating trade proposals](#).

Viewing other agents' schedule details

You can view the schedule details of other agents and create trade proposals in this view. It's as easy as clicking on any weekday column in the row that contains the agent's name to whom you want to propose a trade.

Tip

You might not be able to create trade proposals as described in the topic below. Ask your supervisor if schedule trading is permitted in your contact center.

Viewing schedule details

The screenshot shows a schedule grid for agents a_01 a_01, a0001 a0001, a0002 a0002, a0003 a0003, a0004 a0004, a0005 a0005, and a0006 a0006. The columns are Sunday, Monday, and Tuesday. The row for a0002 a0002 is highlighted. An arrow points to the 'a0002 a0002' label with the text 'Select a schedule.' Another arrow points to the 'a0002 a0002' label with the text 'This button is enabled only if the Time check box is selected.'

Schedule Details

AgentF02 AgentL02
Site1
Team1.1

☐ Tuesday, August 1, 2017
Shift: flexible shift, 02:00 AM – 10:00 AM; Activities: Trade MSA_(1496742949979)_Site1; Paid Hours: 08:00

Time	Paid	Type	Item name
02:00 AM – 10:00 AM	08:00	Shift	flexible shift (Trade MSA_(1496742949979)_Site1)
02:00 AM – 10:00 AM	08:00	Work	Trade MSA_(1496742949979)_Site1

Close this window if you do not want to create a trade

Close Help Create trade proposals

To view other agents' schedule details:

1. In the row containing the agent's name with whom you want to trade, click the weekday.
The selected agent's schedule details open for that day.
2. If you want to view the agent's schedule details for more than one day, click the agent's name.
The selected agent's schedule details open for that week.
3. If the dates and times in the schedule details are suitable, **create a trade proposal** for this agent.
4. If you only want to view the details and are satisfied, click **Close**.

Creating the trade proposal

The image shows two overlapping windows from a software application. The background window is titled 'Schedule Details' and displays information for agent 'a0002 a0002', including 'Switch01' and 'Team01'. It shows a schedule for 'Tuesday, June 13, 2017' with a shift from 05:15 AM to 01:15 PM. A table lists activities: 'Shift' (05:15 AM - 01:15 PM, 06:45 paid), 'Work' (05:15 AM - 06:15 AM, 01:00 paid), 'Break' (06:15 AM - 06:45 AM, 00:00 paid), and 'Work' (06:45 AM - 12:00 PM, 05:15 paid). The foreground window is titled 'Create trade proposals' and shows 'Schedule dates selected for the trade: 6/13/17'. It has a checkbox 'Check if you want to manually approve the response to this trade proposal.' which is checked. There is a 'Comments' text area and a 'Create' button. Annotations with arrows point to specific elements: 'Click here to select this shift for a trade.' points to the first checkbox in the schedule table; 'Click to create the trade proposal.' points to the 'Create trade proposals' button in the background window; 'Click this box if you want a manual response to the proposal.' points to the checked checkbox in the dialog; 'Add comments applicable to this trade.' points to the 'Comments' text area; and another 'Click to create the trade proposal.' points to the 'Create' button in the dialog.

Schedule Details

a0002 a0002
Switch01
Team01

Close Help

Click here to select this shift for a trade.

Time	Paid	Type	Item name
Tuesday, June 13, 2017			
Shift: Shift01, 05:15 AM – 01:15 PM; Activities: A01; Paid Hours: 06:45			
05:15 AM – 01:15 PM	06:45	Shift	Shift01 (A01)
05:15 AM – 06:15 AM	01:00	Work	A01
06:15 AM – 06:45 AM	00:00	Break	Break01
06:45 AM – 12:00 PM	05:15	Work	A01

Create trade proposals

Schedule dates selected for the trade: 6/13/17

This trade is for: a0002

☒ Check if you want to manually approve the response to this trade proposal.

Comments:

Cancel Help Create

Click to create the trade proposal.

Click to create the trade proposal.

Add comments applicable to this trade.

Click this box if you want a manual response to the proposal.

To create and send a trade proposal to the agent:

1. In the **Schedule Details** window, click the check box near the weekday name.
If you select at least one check box, the Create trade proposals button is enabled. To select all days in the dialog select the top-most check box.
2. Click **Create trade proposals**.
The Create trade proposals window opens.
If applicable, click the Check if you want to manually approve the response to this trade proposal check box.
3. In the **Comments** field, enter any information about this trade that you want the receiving agent or your supervisor to know.
4. Click **Create**.
5. The **My Trades** view opens and the trades is added to your list of trades.