Workforce Management Agent Help

Viewing other schedules

4/16/2025

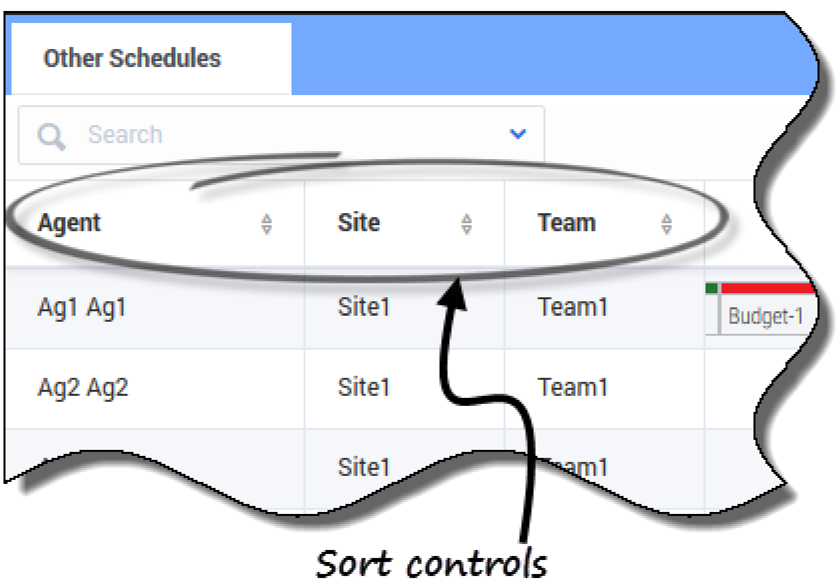
Contents

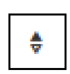
Viewing other schedules

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



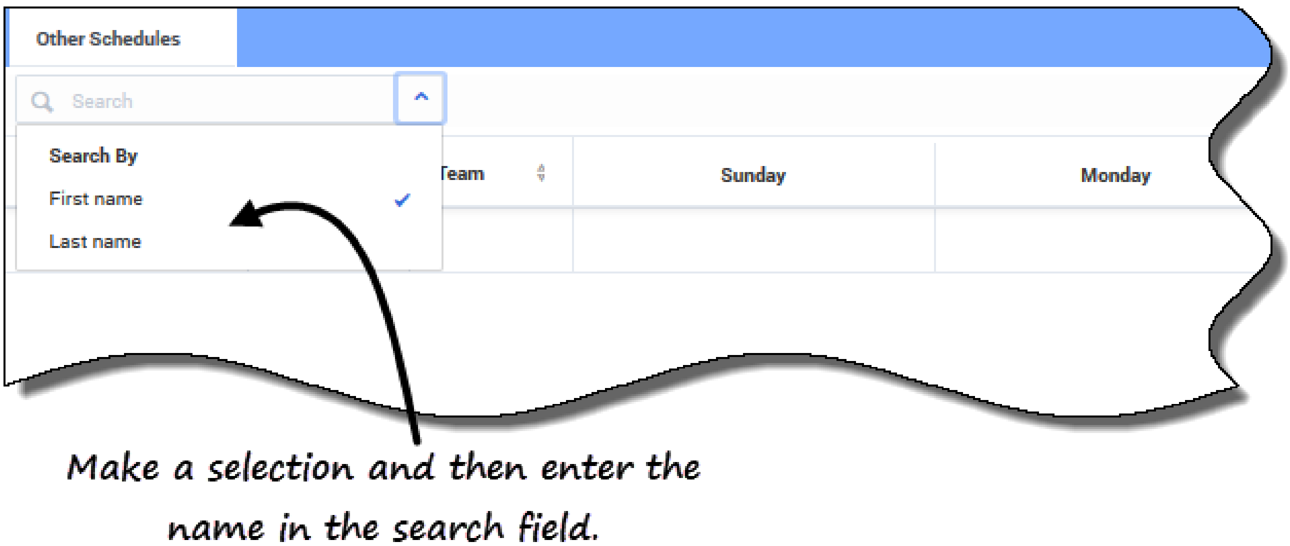
Click the **Agent**, **Site**, or **Team** column header to sort  the data in that column in ascending or descending order.

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.

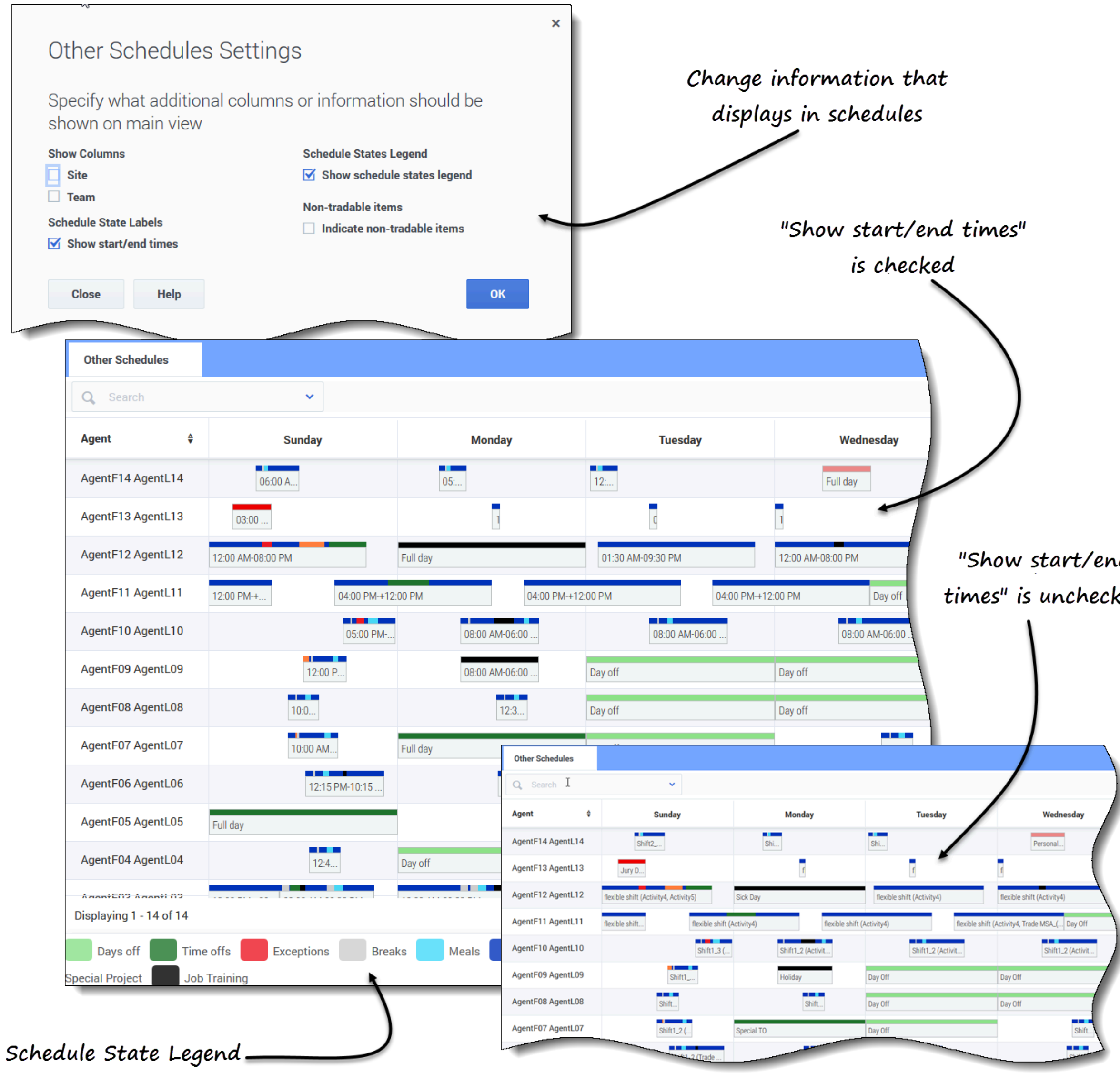
Searching for agents

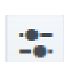


In the **Search** field, use the drop-down menu to search for agents.

- 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

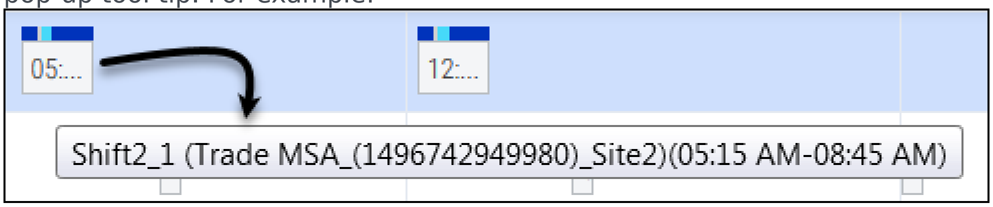


Click **Settings**  to specify what columns or other information to show in schedules. You can choose to:

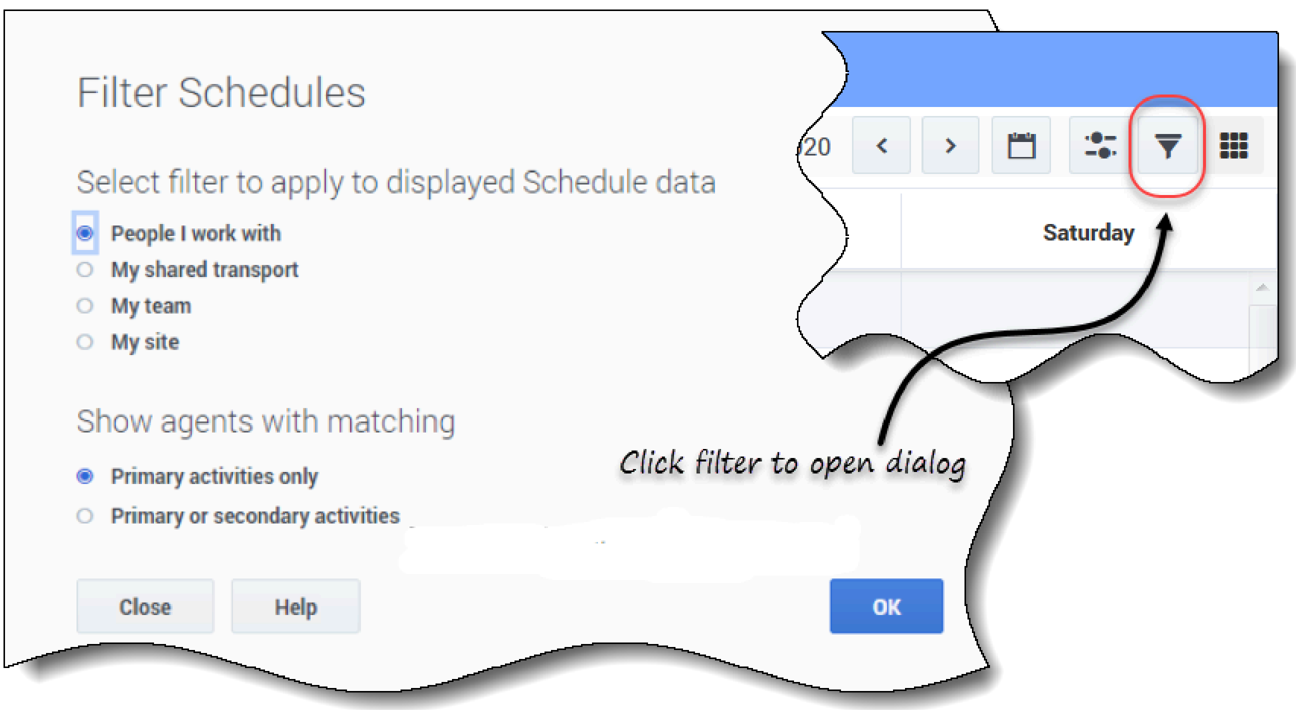
- Add the **Site** and/or **Team** columns
- Show a legend for **Schedule States**
- **Indicate non-tradable items** in schedules
- **Show start/end times** (displayed, by default) or, if you clear the check box, show item names

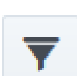
> **Tip**
>
> Full day items display as **Full day** when **Show start/end times** is checked. They display with start/end times if the duration is less than a full day. Day off items are displayed as **Day Off**.

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**

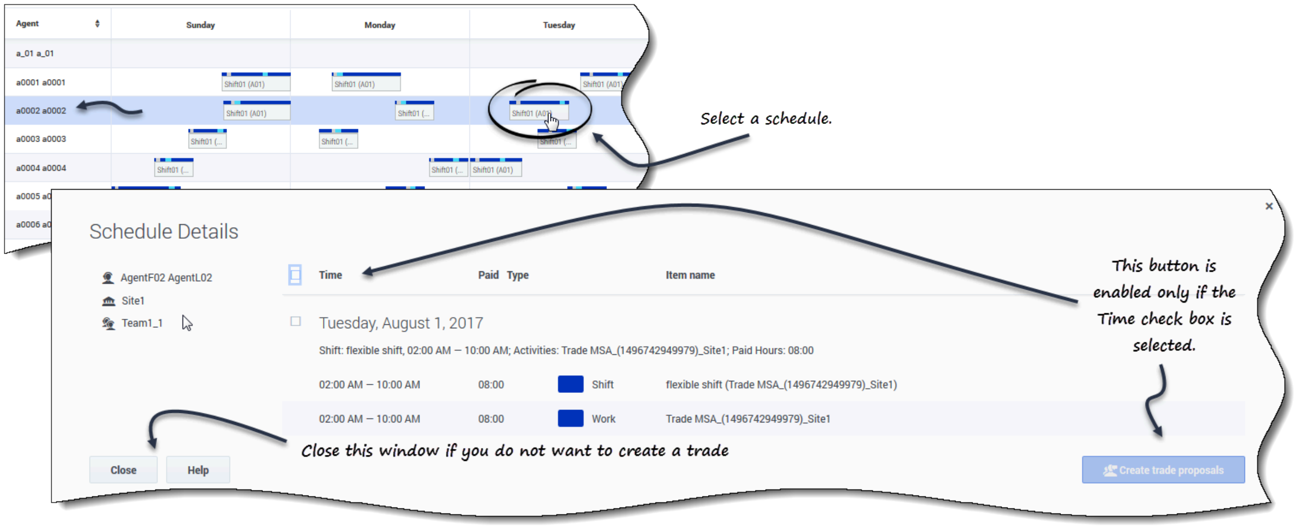
> Tip
>
> You will see only the filtering options made available to you by your supervisor or a site administrator. To understand the difference between the **People I work with** and **Primary activities only** filters see Creating trade proposals.

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.

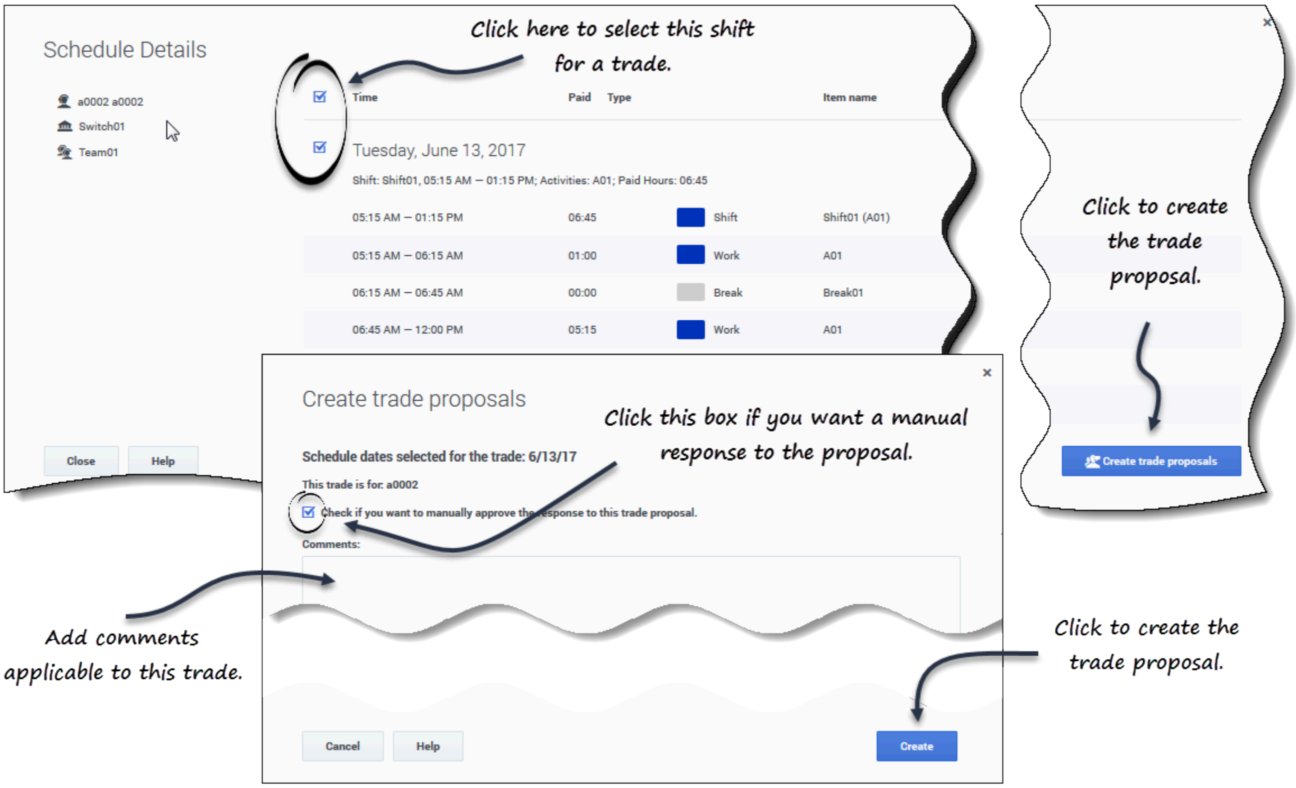
Viewing schedule details



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



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.