Workforce Management Web for Supervisors Help

Filter Dialog

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Filter Dialog

Use the **Filter** dialog box to change which items appear in the **Calendar Items** module:

1. Select the **Calendar** tab.
2. Select **Calendar Items** from the **Views** menu.
3. Select one or more objects from the **Objects** pane. An object can be:
    - In the **Agents** tree: a business unit, site, team, or agent
    - in the **Activities** tree: business unit, a multi-site activity, site, activity.
4. Select a date or dates on the Calendar.
5. Click **Get data**.
6. Click the Filter icon on the **Calendar Items** module toolbar or select **Filter** from the **Actions** menu.
   The **Filter** dialog box appears. It has three tabs:
    - **Calendar Items** lists all exception types, preference types, time-off types, and rotating patterns.
    - **Status Requested** lists all statuses that can appear in the Status Requested column of the Calendar table.
    - **Status Actual** lists all statuses that can appear in the Status Actual column of the Calendar table.
7. Clear the check boxes for any Calendar items or statuses that you want to hide from the Calendar display. Or select the check boxes for any currently hidden items that you want to display.
8. Click **OK** to save your changes or **Cancel** to restore the existing selections.
   The **Calendar** view is updated to match your selection.

Tip

By default, if another user adds a new exception type while you have Calendar open, the new exception type is cleared in the **Calendar Filter** dialog box. To see agents who have an exception of the new type assigned, open the **Filter** dialog box and select the check box for the new exception type.