Workforce Management Web for Supervisors Help

Meeting Scheduler

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Meeting Scheduler

Use the **Meeting Scheduler Wizard** to schedule a meeting:

1. In the **Schedule** module, select one of these views: **Master Schedule Weekly**, **<schedule> Weekly**, **Master Schedule Intra-day**, **<schedule> Intra-day**.

2. At the top right of the **Work** pane, select the week that you want to schedule the meeting.

3. Click **Meeting Scheduler** .

4. At the Please select a meeting from the list page, choose an existing meeting (or decide to create a new one) and enable or disable auto-commit.
   If you chose to use an existing meeting, you will see all **Meeting Scheduler** pages except Meeting Parameters. Otherwise, you will see only the Participants and Meeting Parameters pages.

5. At the Participants page, choose the agents who should attend (if you are creating a new meeting). if you use an existing meeting, the list of participants is read-only.

6. At the Dates Range page, choose the range of dates that are acceptable for the meeting.

7. At the Meeting Parameters page, select the meeting type, possible dates, possible times, duration, and minimum percentage of required attendees.

8. A message box appears, listing how many agents were scheduled for the meeting. Click **OK**.

9. If some agents were not scheduled, a message box may appear listing them. Click **OK**.
   The meeting is scheduled, and exceptions, representing meeting, are inserted into the schedule.

Meeting Scheduler vs. Meeting Planner

The Meeting Scheduler is best suited for scheduling ad hoc meetings and other meetings that you did not know about when you built the original schedule.

The **Meeting Planner** (available through the **Policies** module) is useful for scheduling pre-planned meetings especially ones that recur, such as weekly team meetings or bi-weekly one-on-one coaching sessions. If you want to edit, copy, or delete meetings, use the Meeting Planner.