Workforce Management Web for Supervisors Help

Meetings

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Meetings

Use the **Meetings** view to create, edit, copy, or delete meetings, or to assign attendees to meetings.

> ### Important
> To configure objects and change settings in the **Meetings** view, you must have the appropriate role privileges. See Policies Role Privileges.

Planner vs. Scheduler

Use the **Meeting Planner** (described here) to create and configure meetings that you know about in advance. It is especially useful for recurring team meetings or coaching sessions. Meetings that are created in the **Meeting Planner** are taken as inputs during schedule building.

Use the Meeting Scheduler to create ad hoc meetings and insert them into a schedule that has already been built. Access the **Meeting Scheduler** feature in WFM Web Supervisor from within the **Intra-Day Schedule** view or **Agent-Extended Schedule** view.

Meetings Pane

The toolbar above the **Meetings** pane contains the following controls:

New	Creates a new meeting, which begins by opening the Properties tab.
Delete	Removes the selected meeting. This command cannot be undone. A **Confirmation** dialog enables you to cancel or continue. This command is not enabled if the meeting contains one or more agents who are not visible to the current user (because of a lack of permissions).
Copy	Enables you to copy the selected meeting to create a new one.
Filter	Filters the **Meetings** list by agent or team. See Filtering Agents and Teams.
Sort	Sorts the **Meetings** list in ascending or descending order. (You can also click the **Meetings** column header to sort the list.)

This pane also includes a Search field and Help icon.