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Workforce Management Web for Supervisors Help

Scenario Intra-Day: Options Dialog Box


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Use the **Options** dialog box to configure the data that is shown on the:

- **Intra-Day view** or **Agent Extended view** for the current scenario.
- **Master Schedule Intra-Day** or **Master Schedule Agent-Extended view**.

Opening the Options dialog

To open the **Options** dialog box:

1. Click **Options**  on the **Actions** toolbar, or select **Options...** from the **Actions** menu.
The **Options** dialog box opens.
 - When called from an **Intra-Day** view, it has three tabs: **Options**, **Performance**, and **Columns**.
 - When called from an **Agent-Extended** view, it has two tabs: **Options** and **Columns**.Each tab is described below.
2. After you are done configuring the **Options** dialog box, click **OK** to save your changes, or **Cancel** to restore the original selections.

The **Options** dialog box closes and the view refreshes. The settings that you configure for a scenario or the **Master Schedule** appear whenever you return to the view for that scenario or for the **Master Schedule**, until you log off.

Configuring the options in the dialog

To configure options in this dialog box:

1. If you do not need the **Legend** to appear, you can clear the **Show Schedule Legend** check box to provide more space for the grid.
2. If you want to see agent availability on the grid, select the **Show Agent Availability** check box. Hours when an agent is unavailable are then shown in light gray on the grid.
3. Select the check box **Show agents with granted and scheduled rotating pattern** or any other calendar preference to see which schedule days contain such an item. The result: a red check box and **Agent** icon appears in the left-most column (labeled "!") for every **Agent** who meets these conditions.

Tip

You can use this tool to learn whether an agent was given a schedule based on a schedule preference, which might influence your decision to modify this agent's schedule. This icon is displayed only if the agent was given a rotating pattern or preference (such as for time off) as a result of building a schedule. If an agent's schedule is manually edited to give him or her a preference, or a schedule from a rotating pattern, then the icon will not be displayed.

4. Select the radio button for the hours you want to show, **24** to show 24 hours or **36** to show 36 hours.
5. Select the **Presentation** type: **Schedule only**, **Schedule on top**, or **Marked time on top**. Your selection affects the colored bars in the schedule. If **Schedule only** is selected, you cannot see **Marked time**.

Configuring the Performance tab

To configure the **Performance** tab (not available in **Agent-Extended** view):

1. If you select the Show Performance Information check box, you can further customize exactly what performance information WFM Web shows on the **Intra-Day Schedule** view. If you clear this check box, the rest of the options on this tab are disabled.
2. If you prefer not to see the legend that explains the colors used to distinguish performance data, clear the **Show Performance Legend** check box.
3. The **Update Automatically** check box determines whether schedule changes are shown when they happen. Clear this only if you have network bandwidth issues that make automatic updates a problem.
4. If you selected to view performance data, you can select the check boxes to show additional information in the performance table.

Tip

You see the table *only* if the **Full-Day View** check box is not selected.

In addition to scheduled coverage and calculated staffing, which always appear, you can select any or all of these **Show additional data** options to appear in the table:

- **Required Staffing**
- Difference between **Coverage** and **Calculated Staffing**
- Difference between Coverage and Required Staffing
- Scheduled **Service Level Percentage**
- Scheduled **Deferred Service Level Percentage**
- Scheduled ASA (**Average Speed of Answer**)
- Overtime Schedule (default: cleared)
- Overtime Requirement (default: cleared)

Important

If any of the cells in the **Difference in Calculated Staffing** or **Difference in Required Staffing** columns show as understaffed, WFM alerts the user by changing the color of the cell to red. Although red is the default color, you can change it, by using the settings in **About > Settings** (in the upper-right corner of the GUI).

Configuring the Columns tab

To configure the **Columns** tab:

- Select the check boxes for the optional columns that you want to display. Clear the check boxes for any columns that you want to hide. For **Intra-Day** and **Agent-Extended** views, you can add the following columns: **Site Name**, **Shared Transport**, **Overtime**, **Paid Hours**, **Total Hours**, **Start Time**, **Accessibility**, and **Comments**. In **Intra-Day** view, all columns are sortable, except for **Comments**. In **Agent-Extended** view, these columns are not sortable.