Workforce Management 7.6

Agent

User’s Guide

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Table of Contents

Preface

Welcome to the Workforce Management Agent Desktop User's Guide. This document introduces you to the concepts, terminology, and procedures relevant to Workforce Management 7.5 Agent Desktop. All the information in this book can also be found in the Agent Desktop on-line help system.

This preface contains these sections:

Genesys Workforce Management is a contact center resource-planning application, which consists of a client, the Workforce Management GUI, and Schedule Server, Data Aggregator, and Web Services server software. The servers make data available to Workforce Management by writing it to the Workforce Management database, serve real-time agent states, and provide browser-based functionality.

Genesys Workforce Management unifies employee scheduling and preference allocation, planning, real-time and intraday management, performance assessment, and historical reporting into a consolidated contact center resource-planning application. The Workforce Management component in this product uses interaction data that the servers collect to:

- Forecast contact-center workload and workforce requirements.
- Create agent schedules.
- Monitor adherence to schedules, including the display of real-time agent states.

Intended Audience

This document is intended for use by Agents at a contact center and those who train them. All information in this book can also be found in the Agent Desktop on-line help system, accessed through the Agent Desktop software.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

75wfm_ref_08-2006_v7.5.001.00

Type Styles

Italic

In this document, italic is used for emphasis, for documents' titles, for definitions of (or first references to) unfamiliar terms, and for mathematical variables.

Examples:

- Please consult the *Genesys Migration Guide* for more information.
- *A customary and usual practice* is one that is widely accepted and used within a particular industry or profession.

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Chapter

1 Getting Started Overview

This chapter covers the following topics:

Functions and Features

With Workforce Management (WFM) Web for Agents you can:

- View your schedule.
- Select a scenario for schedule bidding.
- Indicate schedule preferences.
- See how much time off you have of each time-off type.
- Request time off.
- View other agents' schedules (if enabled at your site).
- Trade your schedule days with other agents (if enabled at your site).

Opening WFM Web

You can log into WFM Web from any computer whose web browser can run JavaScript, such as Microsoft Internet Explorer, Firefox, or Mozilla.

You will need the URL (web address) for WFM Web for Agents:

1. Ask your supervisor for the URL for WFM Web for Agents.
2. Once you are given this URL, add it to your browser's Favorites or Bookmarks list so that you can easily return to it.

Note: WFM Web is optimized for a screen resolution of at least 1024x768. At lower resolutions, some elements (such as table headers) might not display correctly.

Genesys recommends that you not run WFM Web in more than one browser window on the same workstation, because doing so can cause the program to behave unexpectedly. (In other words, do not open a second browser window on the same WFM Web session by selecting File > New or pressing Ctrl+N.)

However, you can start a separate WFM Web session by launching a separate instance of your browser, then logging in to WFM Web again from that browser.

Security Features

Whether you can view other agents' schedules, and whether they can view yours, depends on how your system administrator has set up WFM Web. However, other agents can never set preferences or make vacation requests for you, nor vice versa.

Logging In

To start using WFM Web:

1. Open a web browser.
2. Enter the WFM Web URL in the address line of the browser and press Enter.

   > **Note:** Your supervisor or system administrator can provide you with the URL for WFM Web.

3. Enter your user name and password in the Login window that appears.
4. Click OK.

   WFM Web either opens or displays an error message indicating why it cannot log you in.

Menu Options

Every WFM Web for Agents window displays the Menu Bar, shown below, which contains a set of navigation buttons:

Figure 1: WFM Web for Agents Menu Bar

Click these buttons to move from window to window. Click them in the illustration above to jump to a description.

Notes:

- You may not see all of these items on your Menu Bar, depending on the options that have been configured for you.
- When WFM Web opens, it displays your schedule for the current week. See Changing the Date for help on how to display different weeks.

Changing the Date

When you open WFM Web, the Daily Schedule window appears. It displays your schedule for the current week. To change the date, use the date arrow buttons or the pop-up calendar button.

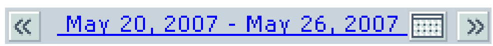


Figure 2: Current Week and Buttons to Change It

Similar buttons appear in other WFM Web windows. In some windows, they move you by different time intervals, as discussed below.

To use the date arrows:

- Click << to move backward.
  - In the Schedule, Trading, and Preferences windows, you reach the previous week.
  - In the Time Off window, you reach the previous year.
  - In the Personal and About windows, you reach the previous day.
- Click >> to move forward.
  - In the Schedule, Trading, and Preferences windows, you reach the next week.
  - In the Time Off window, you reach the next year.
  - In the Personal and About windows, you reach the next day.

To use the pop-up calendar:

1. Click the Calendar button ( ).

A calendar appears.

2. Set new dates.
  - Click a day to select the week containing that day.
  - Click the month drop-down list to jump to a different month.
  - Click << or >> on either side of the year to jump forward or back one year.

3. Click OK.

The window automatically refreshes to match your date selection.

Logging Off

When you are finished using WFM Web, always log off.

Note: If you do not log off, other users might be able to view your account information.

To log off:

1. Click Logoff from any WFM Web window.

This ends your WFM Web session and returns you to the Login window. You can now close your browser if you want to.

Note: If your session expires, you are automatically logged off.

Session Expiration

A WFM Web session expires if you have not used it for a certain amount of time. If your session expires, the Session Expired warning appears when you attempt to use WFM Web.

To start using WFM Web again:

1. Click OK in the warning dialog box.

   The Login dialog box displays.

2. Enter your user name and password in the Login window that appears (just as you would to start using WFM Web).

If you are finished using WFM Web:

- Close your browser. If your session expires, you are automatically logged off.

Schedule Window

Two tabs near the top of the Schedule window offer different views of agent schedules:

- "My Schedule Tab" on page 14 displays your schedule information for the current week. (To display other weeks, see Changing the Date.)
- "Other Schedules Tab" on page 17 displays a filterable, sortable, and searchable list of other agents and their schedules.

My Schedule Tab

The menu bar across the top of the My Schedule tab window offers these Web Services Menu Options: Schedule, Trading, Preferences, Time Off, Bidding, Personal, About, Help, Log Off. You may not see all of these items on your Menu Bar, depending on the options that have been configured for you.

If your site allows schedule trading, this window also displays trading messages and controls. The page's contents are:

Trading message box near the top of the window, alerts you to any open trade proposals or responses for the displayed week. It does so with messages of the form: “You have unanswered [responses to] trade proposals for this week.” See Review proposals (below) to respond.

Review proposals opens the Personal Proposals window, where you can review the trade proposals. Appears only if you have trade proposals.

Review responses opens the My Proposals window, where you can review responses to your trade proposals.Appears only if you have responses to your trade proposals.

Create trade proposals opens the create trade proposals window, where you can create new trade proposals for the days whose check boxes you select below.

>| button opens the Exception Totals pane, where you can view the totals for a selected exception over a selected date range.

Add Exception button opens the Add Exception dialog box, where you can add an Exception to your schedule.

Select the **Check boxes** in the table's first column for any days for which you want to create trade proposals. Then click create trade proposals.

Date shows each date during the week.

Paid hours shows how many hours of paid work you are scheduled for on each day.

Schedule details shows what activities you are scheduled to perform each day. This column also shows break information.

Scheduled attendance Start time shows when you are scheduled to start your shift and the start time for each activity and break during your workday.

Scheduled attendance End time shows when you are scheduled to end your shift and the end time for each activity and break during the workday.

Add Exception Dialog Box

To add an exception to your schedule, click the Add Exception button. The Add Exception dialog box appears.

Select an exception from the **Exceptions** drop-down list, if it is configured to appear.

The **Allowed Range** label displays the activity insertion range that was specified by a supervisor (for example, 1/19/09—3/2/09). Not editable. The value becomes No Limits when there are no restrictions for the exception to be insert inserted.

If the exception that you choose is a Full Day exception, the corresponding (and read-only) **Full Day Exception** check box is selected. If the selected exception is not a Full Day, the Full Day Exception check box is cleared.

Specify place for exception Pane

Select the **Specify place for exception** check box to enable this pane and specify a Start Time and End Time for the exception. Your choices must fall within the Allowed Range that was determined by your choice from the Exceptions drop-down list.

Specify place for exception fields

Select or enter hours and minutes values in the drop-down fields Start Time and End Time of the selected exception. The start time must occur before the end time. The hours `12AM ... 12PM` represent times in the current day; the times `+12AM ... +12PM` represent times in the next day.

Select or enter hours and minutes values in the drop-down field Paid Time of the selected exception.

Select the check box of one or more weekdays. None are selected by default.

Find place for Exception pane

This pane is enabled only if the Find place for Exception check box is selected:

Select this check box to allow WFM to determine a Start Time and End Time within a certain range.

Possible dates fields

Select a date from the pop-up calendar in the fields Earliest Start and Latest End.

The start date must occur before the end date.

Possible times fields

Select or enter hours and minutes values in the drop-down fields Earliest Start and Latest End. The start time must occur before the end time. The hours `12AM ... 12PM` represent times in the current day; the times `+12AM ... +12PM` represent times in the next day.

Duration

Select or enter hours and minutes values for the drop-down fields.

Possible weekdays

Clear the check box for each weekday to be excluded as “possible” — all are selected by default.

Pending Changes

WFM Web for Agents displays changes which are requested but not yet approved in a “Pending Changes” table, which appears directly below the

Agent's schedule. Click the Undo Changes link in the leftmost column of any pending change, to cancel your request.

Exception Totals pane

Use this pane to view the totals for a selected exception over a selected date range. These controls do not define any exceptions; they only filter the display.

Display Controls

- Click the `>|` icon to open the pane. This action pushes the data portion of the Master Schedule display to the right.
- Click the `Exception Totals -` icon to roll up the pane.
- Click the `Exception Totals +` icon to roll down the pane.
- Click the `Additional Information <` icon to close the pane.

Operating Controls

- In the **Exceptions** field, Select an exception type from the drop-down list.
- In the **Start Time** field, a date or select one from the pop-up calendar.
- In the **End Time** field, enter a date or select one from the pop-up calendar.
- Click the **Show** button to display totals (in the Totals field) for exceptions that match the 3 fields above.
- The **Totals** field displays exception, period, and number of minutes on 3 lines.

Warnings vs. Errors

- If WFM displays warnings, the exception is inserted into the schedule as a pending change.
- If WFM displays errors, the exception is not inserted into the schedule.

Other Schedules Tab

The Other Schedules tab lists agents and their schedules (all agents in the Enterprise if unfiltered). Columns:

- **Agent** displays the name of the agent whose information appears in that row. Position the cursor over the yellow schedule icon in a day cell to display its details in a pop-up window.
- **Site** displays the name of the agent's site and (in parentheses) the site's Business Unit, if there is one.
- **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 the Agent, Site, or Team column header to sort the grid by the data in that column, in ascending or descending order.

The **Filter** button displays the Filter 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), My Team, My Site, My Business Unit, or Enterprise.

Note: The filtering options that are available to you have been configured by a supervisor or a system administrator.

The **Find An Agent** button displays the Find an Agent dialog box, where you can search the grid for, and highlight instances of, an agent's first name or last name.

Chapter

2 The Trading Windows

This chapter covers the following topics:

Trading Overview

The trading windows—if your system administrator has enabled them—help you obtain more convenient schedules by trading with other agents. This help topic first describes the whole trading process (How Trading Works) and then breaks it down into steps (Requirements for a Successful Trade). For step-by-step instructions, see the Trading Windows Road Map.

Using the eight trading windows, you can:

- Create schedule trade proposals.
- Respond to other agents' personal or community trade proposals.
- Review or cancel your own trade proposals.
- Review or cancel your responses to other agents' proposals.
- View other agents' schedules or schedule details.

How Trading Works

A trade can include up to one full week of schedule days. Every schedule trade requires:

- One agent's proposal for a trade. The proposal specifies which schedule days this agent wants to trade.
- Another agent's response to that proposal. The response indicates this agent's willingness to accept the proposed trade.
- An approval. The approval can be either *automatic* (by WFM Web) or *explicit* (by a supervisor).

For some trades, the proposing agent must explicitly accept the response before submitting the trade for approval. This is always true for *community proposals,* which are offered to all agents within a team or site.

If a trade is approved, it *executes:* both agents' schedules change to reflect it, and the trade no longer appears in most trading windows. (However, all of your own proposals still appear on the My Proposals tab even after WFM Web executes the corresponding trades.)

Not all trades are approved. Under certain conditions (for example, when one agent is not qualified for the other's scheduled activities), WFM Web automatically declines a trade. If either agent's schedule is changed before a pending trade's approval, WFM Web automatically cancels the trade. If a pending trade has not been approved before the first day involved in the trade, it expires. In each of these cases, the trade does not occur

Requirements for a Successful Trade

For a trade to take place, all the following steps must occur:

1. One agent creates a community or personal trade proposal.
2. At least one agent responds to the community proposal or the receiving agent accepts the personal proposal.
3. The proposing agent accepts a response to a community or personal proposal.
4. (This step is required for personal proposals only if the proposing agent specified manual approval.)
5. The trade receives either WFM Web's automatic approval or a supervisor's explicit approval.

Trading Windows Road Map

The eight Trading windows enable you to propose schedule trades, accept or decline other agents' trading proposals, and cancel your proposals or responses. See the sections below for how to:

- Open the trading windows.
- Move between trading windows.
- Use the trading windows' common features.

Opening the Trading Windows

To open the trading windows from other windows, click Trading on the Menu Bar.

- If you have unanswered personal trade proposals for the currently selected week, the Personal Proposals window opens.
- If you have no unanswered personal trade proposals for the currently selected week, the My Proposals window opens.

Moving Between Trading Windows

Most trading windows include the Trading menu bar.

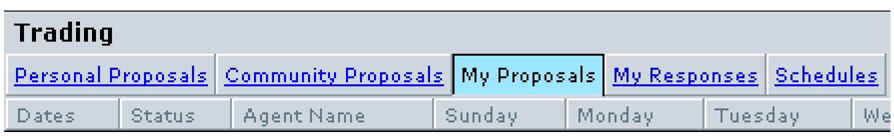


Figure 3: Trading Menu Bar

- Click tabs to move among the trading windows.

Each trading window shows a particular kind of information about trade proposals, responses, or underlying schedules. The eight trading windows are:

Trading Windows

Personal Proposals

Shows trading proposals that another agent has proposed to you specifically.

Community Proposals

Shows trading proposals that agents have offered to all agents within your team or site.

My Proposals

Shows schedule trades that you have proposed, with their status and any responses. (Responses appear below their associated proposal.)

My Responses

Shows your responses to other agents' trading proposals, with status information.

[Trading] Schedules

If enabled, helps you identify trading partners by showing other agents' scheduled working hours. (If your system administrator has disabled this feature, the Trading menu bar does not include a Schedules tab, and you cannot open this window.)

Agent days displayed with a darker background color are days that are not compatible with you, as the logged in agent. For example, an agent day in a darker background color may indicate a full-day exception that cannot be traded or a day that contains activities in which you are not skilled, which also cannot be traded.

Schedule Details Pop-Up

Clicking an agent name shows that agent's detailed schedule (activities and start/end times.

Create Trade Proposals

Allows you to initiate a trading proposal. Click Create Trade Proposals in the Schedule Window to open this window.

Trading Comments

If your system administrator has enabled WFM for Agents to support comments, allows you to add explanatory comments to trade proposals and responses. Click the action buttons in the Personal Proposals, Community Proposals, My Proposals, or My Responses windows to open this window.

Trading Windows' Common Features

Most of the trading windows display information for one week at a time, with standard date selectors to move to other weeks. Most windows show up to 10 trades at a time in a table that includes some, or all, of the following columns and controls:

Trading Windows Controls

Re column

In the Personal Proposals or Community Proposals window, an asterisk (*) in this column indicates that you have already responded to this trading proposal.

Dates column

Shows the start and end dates involved in the trading proposal or response.

Status column

In the My Proposals or My Responses window, this column shows the acceptance or approval status of the trading proposal or response.

Agent Name column

Shows the agent originating or responding to the trading proposal. Click any link in this column to view the corresponding agent's Schedule Details pop-up.

days of the week columns

These columns show work start/end times for each day in the proposed trade.

Total paid column

Shows the total number of paid hours covered by the proposed trade.

Action buttons

Use these buttons to Accept, Decline, or Cancel a proposal or response, or to respond to a community proposal.

Comment column

Shows any comments attached to the proposal or response. If the trade needs to be approved by a supervisor, the supervisor can see any comments you enter when you make the trade request. Or the supervisor may enter a comment about the trade for you to read. This column does not appear if your system administrator has disabled the Comments feature.

Previous 10 button

Click this button to display the next set of trades (if there are more than 10 trades).

Next 10 button

Click this button to display the previous set of trades (if there are more than 10 trades).

Trading Windows for Specific Tasks

Use the eight trading windows for:

- Reviewing your proposals and their responses
- Reviewing your responses to other agents' proposals
- Creating trade proposals
- Adding comments to a trade (if enabled)
- Viewing personal proposals available to you
- Viewing community proposals that are available
- Viewing other agents' schedules
- Viewing other agents' schedule details

For instructions about how to move among the trading windows and using their common features, see the Trading Windows Road Map. For a description of how trading works, see the Trading Overview.

Reviewing Proposals

Reviewing My Proposals and Their Responses

Use the My Proposals window to:

- Review schedule trades that you have proposed, along with their status and any responses.
- Accept or decline responses.
- Cancel your own pending trade proposal, if you change your mind.

The window includes standard date selectors and a table of proposals, whose general controls are described in Trading Windows' Common Features.

About the Proposals Table

The table shows all of your proposals whose first day falls within the selected week. It is sorted by the first date of each proposal.

Responses appear on separate rows below their associated proposals.

- Click an agent's link in the Agent Name column if you want to display his or her Schedule Details pop-up.

Viewing and Changing Trade Status

The Status column tells you what the current status is for each trade proposal. Each proposal's (or response's) status determines the actions that you can take in the Action column:

Table 1: Trade Proposals and Responses

Status	What It Means	Actions You Can Take
Open	The proposal has been offered to a specific agent or to the community, and has not yet passed into one of the other statuses listed in this table.	Click Cancel if you want to cancel an open proposal.
Accepted	Another agent has accepted your personal proposal or responded to your community proposal.	Click Accept on a response row to submit this trade (with this response) for approval. Click Decline if you choose not to trade with this respondent.
In Review	Another agent has accepted your proposal and, if required, you have approved the response. But the trade could not be auto-approved. It is now awaiting a supervisor's approval.	Click Cancel if you want to cancel your original proposal. This will also cancel the response.
Confirmed	Both you and the other agent accepted the proposal, and the trade received either automatic or supervisor approval. Your trade has executed.	None.
Declined	The proposal was declined by the responding agent (in the case of a personal proposal), by a supervisor, or by WFM Web. The trade will not take place.	None.
Cancelled	Either you explicitly cancelled your proposal, or WFM Web automatically cancelled the pending trade (because of changes to your schedule or the responding agent's schedule). The trade will not take place.	None.
Expired	The proposal did not receive approval by the day before its first included day. The trade will not take place.	None.

When you click the Accept, Decline, or Cancel button, the Trading Comments window opens. There, you can add a comment and complete the action by clicking Submit.

For further details about requirements for a trade's approval, see Trading Overview.

Reviewing My Responses to Other Agents' Proposals

Use the My Responses window to:

- Review your responses to other agents' schedule trade proposals.
- Review the status of proposals to which you have responded.
- Cancel a pending response, if you change your mind.

The window includes standard date selectors and a table of proposals and responses, whose general controls are described in Trading Windows' Common Features.

About the Proposals and Responses Table

The table shows all of your responses to proposals whose first date is within the selected week. It is sorted by the first date of each proposal.

The Agent Name column shows the agent who posted each original proposal.

- Click an agent's link in the Agent Name column if you want to display his or her Schedule Details pop-up.

Viewing Trade Status and Canceling Responses

The Status column tells you the current status of each trade proposal/response pair. When a response is in certain statuses, you can use the Action column to cancel it:

Table 2: Trade Status and Responses

Status	What It Means	Actions You Can Take
Accepted	You have accepted this personal proposal or responded to this community proposal. Your response is now awaiting the proposing agent's decision.	Click Cancel if you want to cancel your response.
In Review	You accepted this proposal and, if required, the proposing agent approved your response. But the trade could not be auto-approved. It is awaiting a supervisor's approval.	Click Cancel if you want to cancel your response.

Table 2: Trade Status and Responses (Continued)

Status	What It Means	Actions You Can Take
Confirmed	Both you and the proposing agent accepted the proposal, and the trade received either automatic or supervisor approval. Your trade has executed.	None.
Declined	Your response was declined, either by the proposing agent or by a supervisor. The trade will not take place.	None.
Cancelled	Your response was cancelled: you explicitly cancelled it, or the other agent cancelled the original proposal, or WFM Web automatically cancelled the trade because of changes to either agent's schedule. The trade will not take place.	None.
Expired	The proposal did not receive approval by the day before its first included day. The trade will not take place.	None.

When you cancel a response, if your system administrator has enabled the Comments feature, the Trading Comments window opens. There, you can add a comment and complete the action by clicking Submit.

For further details about requirements for a trade's approval, see Trading Overview.

Creating Trade Proposals

Use the Create Trade Proposals window to propose a schedule trade:

1. In the Schedule window's first column, select the check boxes beside the schedule days that you want to trade. Then click Create Trade Proposals. The Create Trade Proposals window opens. Its first line lists the date(s) that you just selected.

   Note: Some types of exceptions do not appear by name. Instead they are marked by the generic label *Exception*. These exceptions have been configured by the system administrator to be nontradeable.

2. Select either This trade proposal is for an individual or This trade proposal is for the community.

   Your choice determines who will be offered your proposal. The community option includes all agents on your team or all agents at your site, depending on how your system administrator has set up WFM Web.

3. If you choose the individual option, select the agent's name from the drop-down list.

   The list offers agents from your team or from your whole site, depending on how your system administrator has set up WFM Web.

   If you choose the community option, you cannot select individual names here.

4. If you choose the individual option, you can also select Check if you want to manually approve response to this trade proposal.

   Selecting this check box means that for the trade to take place, you must explicitly confirm the other agent's acceptance of this proposal. Clearing the box means that once the other agent accepts it, the trade will immediately be submitted for approval, without your intervention.

   If you choose the community option, you cannot clear this check box. You must confirm (accept) one response in order to submit the trade for approval.

5. (Optional) Enter comments about this proposal in the large text box near the bottom. You can only enter comments if your system administrator has enabled the Comments feature.

6. Click Submit to send the proposal, or Cancel to delete it without sending it.

Adding Comments to a Trade

Note: You can only add comments to a trade if your system administrator has enabled this feature.

Use the Trading Comments window to add comments (if you want) and then complete one of the following actions that you have begun in another window:

- Accept, Decline, Cancel, or respond to a trade proposal.
- Accept, Decline, or Cancel a response.

The Trading Comments window's heading text indicates the action that you are about to complete.

1. Type your comments into the Comments text box.

   For example, you might want to indicate your reason for declining or canceling a proposal or response.

2. Click Submit to attach your comments and complete the action. (Or click Cancel to discard your comments and cancel the action.)

The window that opens after you click Submit depends on what trading action you are completing:

- Accept Proposal, Respond to Proposal, or Cancel Response opens the My Responses window.

- Decline Proposal or Cancel Own Proposal returns you to the previous window.
- Accept Response or Decline Response opens the My Proposals window.

Viewing Personal Proposals Available to Me

Use the Personal Proposals window to examine, and respond to, trading proposals that another agent has sent specifically to you. The window includes standard date selectors and a table of proposals and/or responses, whose general controls are described in Trading Windows' Common Features.

About the Proposals and Responses Table

The table is sorted by Agent Name. It shows only proposals whose status is Open—they have not expired, are not in review, and have not been accepted, confirmed, declined, or cancelled.

The table provides the following details:

- In the first (Re) column, an asterisk (*) indicates that you have already responded to the trading proposal on this row.
- In the Agent Name column, you can click to display an originating agent's Schedule Details pop-up.

How to Accept or Decline a Proposal

In the Action column:

- Click Accept if you want to trade schedules.
- Click Decline if you do not want to trade.

The Trading Comments window opens, in which you can add a comment and submit your response.

Viewing Community Proposals

Use the Community Proposals window to examine, and respond to, schedule trade proposals offered to all agents. Depending on WFM Web's setup at your site, community proposals can be offered to all agents on your team or to all agents on all teams.

The window includes standard date selectors and a table of proposals, whose general controls are described in Trading Windows' Common Features.

Viewing Your Schedule Information

The first row of the Community Proposals view always displays your schedule information, against a differently colored background. Click on your name to view your schedule details for selected week in a pop-up window.

About the Proposals Table

The table is sorted by Agent Name. It shows only proposals whose status is Open—they have not expired, are not in review, and have not been accepted, confirmed, declined, or cancelled.

The table includes the following details:

- In the first (Re) column, an asterisk (*) indicates that you have already responded to the trading proposal on this row.
- In the Agent Name column, you can click to display an originating agent's Schedule Details pop-up.

How to Respond to a Proposal

- In the Action column, click Respond if you want to trade schedules.

  The Trading Comments window opens, in which you can add a comment and submit your response.

Viewing Other Agents' Schedules

Use the [Trading] Schedules window to examine other agents' schedules. This can help you identify agents with whom you want to trade schedules.

Note: You can open this window only if your system administrator has enabled it. A second setup option determines whether you can view schedules only within your own team or across all teams at your site.

About the Schedules Window

The table shows schedule information for up to 20 agents at a time, on each day of the displayed week. Agent days displayed with a darker background color are days that are not compatible with you as the logged in agent. For example, an agent day in a darker background color may indicate a full-day exception that cannot be traded or a day that contains activities in which you are not skilled, which also cannot be traded.

The table includes the following columns:

- **Agent Name column**—Click an agent's name if you want to open the Schedule Details pop-up, which shows you details about the agent's scheduled activities on each day. Click the arrow symbol next to the column title, to sort the table by this column's data.

- **Team column—**Displays the team to which the Agent belongs. Click the arrow symbol next to the column title, to sort the table by this column's data.
- **days of the week column—**These columns show one of the following for each agent on each day: a shift, working hours, Day Off, Time Off, or an exception name.
- **Total paid column—**Shows each agent's total paid hours for the week.

Note: Some types of exceptions do not appear by name. Instead they are marked by the generic label *Exception*. These exceptions have been configured by the system administrator to be nontradeable.

Using the Schedules Window

You can modify the display using the following options:

- To reveal any days that are hidden offscreen, use the horizontal scroll bar at the bottom of the window.
- To reveal more agents, click Previous 20 or Next 20.
- To display a different week, use the date selectors at the upper right.

Viewing Other Agents' Schedule Details

Use the Schedule Details pop-up window to help identify agents with whom you want to trade schedules. It displays details about another agent's scheduled activities, with start and end times, on each day of the selected week.

About the Schedule Details Pop-up Window

The pop-up window displays schedule details for the agent and week identified along the top. The table contains the following columns:

- **Date column—**Each day of the selected week appears on a separate row.
- **Paid hours column—**The agent's paid hours for this date.
- **Scheduled activities column—**Names of the schedule items for this agent on this date.
- **Scheduled Attendance column: Start time, End time—**Shows the agent's scheduled start and end time for the listed activities.

Note: Some types of exceptions do not appear by name. Instead they are marked by the generic label *Exception*. These exceptions have been configured by the system administrator to be nontradeable.

Using the Schedule Details Pop-Up

- If some information is hidden offscreen, use the scroll bar along the right edge to reveal it.
- To close the pop-up window, click its close box in the upper right corner.
- To display a different week, first close this pop-up to restore the previous window. Then change the date in that window, and click the same agent's link in that week's display.

Chapter

3 The Preferences Window

This chapter covers the following topics:

Preferences Overview

Note: If you do not see Preferences in the menu bar, then Schedule Preferences are not enabled for your contact center.

Use the Preferences window to:

- View your preferences for shifts, exceptions, time off, working hours, and availability.
- Add, modify, or delete preferences.
- Add, modify, or delete availability patterns.
- Create availability preferences based on availability patterns.
- Enter comments associated with your preferences.

The Preferences window has three main sections. At the top, the Weekly Preferences Grid shows details about your preferences on each day, with their status:

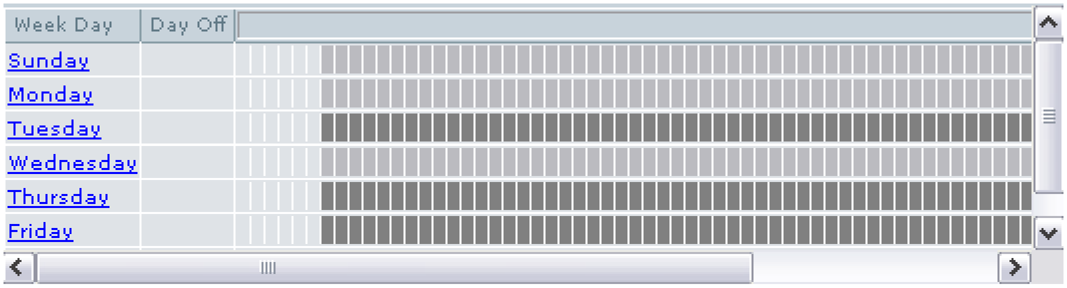


Figure 4: Weekly Preferences Grid

In the middle, you can use the availability patterns button to modify availability patterns and create availability preferences based on patterns. There is also a Legend that identifies the colors used in the Weekly Preferences Grid:

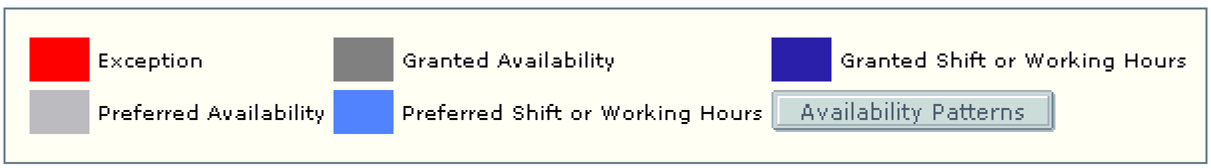


Figure 5: Preferences Legend

At the bottom, the Daily Preferences table summarizes your preferences and preference status on each day:

Week Day	Date	Preference	Start Time	End Time	Paid Hours	Status/Reason	Comments
Sunday	Jan 7, 2007	Availability	6:00 AM	8:12 PM	0:00	Not Scheduled : Item is not scheduled because different schedule has already been built for this day.	
		<Any>		Full Day		Scheduled	
Monday	Jan 8, 2007	Availability	6:00 AM	8:12 PM	0:00	Not Scheduled : Item is not scheduled because different schedule has already been built for this day.	
		<Any>		Full Day		Scheduled	
		Availability	6:00 AM	8:12 PM	0:00	Scheduled	
						Not Scheduled :	

Figure 6: Daily Preferences Table

The Daily Preferences table contains the following columns:

- **Week Day—**The day of the week. Click the name of a day to see the Edit Weekly Preferences window.
- **Date—**The date of the indicated day.
- **Preference—**The names of the preferences and exceptions for each day.
- **Start time—**When each preference or exception is requested to begin. (For a Day Off, this column is empty.)
- **End time—**When each preference or exception is requested to end. (For a Day Off, this column displays “Full Day”)
- **Paid Hours—**The number of paid hours in each preference or exception.
- **Status/Reason—**Status: whether each preference is Preferred, Granted, Declined, Scheduled, or Not Scheduled. See Preference Statuses and Hierarchy for an explanation of these statuses.
  Reason: Why WFM assigned a status such as Declined or Not Scheduled to the Time Off item.
- **Comments—**If any item shown in this list has a comment associated with it, the comment appears in this column.

Preference Statuses and Hierarchy

Before scheduling, a preference can be Granted, Declined, or Preferred. After a scheduled is built for the dates that include this preference, the status can be Scheduled (appears in the schedule) or Not Scheduled (does not appear in the schedule).

- A *Granted* preference will appear in the schedule unless it is first removed or unless another preference is added that out-ranks the first one. If this happens, the status of the lower-ranking preference changes to Declined.
- A *Declined* preference will not appear in the schedule unless it was declined in favor of a higher-ranking preference and the higher-ranking preference is later removed before the schedule is built. If this happens the preference goes back to its original status, which can be Granted or Preferred.
- A *Preferred* preference may appear in the schedule if it complies with the scheduling constraints and optimization settings that are configured for your site.

The hierarchy of preferences is:

1. Granted full-day exceptions.
2. Granted days off.
3. Granted full-day time off.
4. Granted availability.

5. Granted shifts.
6. Granted paid (working) hours.
7. Granted part-day exceptions, granted part-day time off.
8. Rotating patterns.
9. Preferred items (including exceptions, paid hours, and time off with preferred status).

Availability Patterns

You can request availability preferences by creating *availability patterns,* which contain the start and end times you want for a week. Your availability patterns can specify different start and end times for each day.

Use the Availability Patterns window to:

- Create, edit, or delete an availability pattern.
- Create an availability preference based on an availability pattern.

Creating an Availability Pattern

To create a new availability pattern:

1. In the Preferences window, click Availability Patterns.

   The empty Availability Patterns window appears.
2. Click Create Pattern.
3. Enter a name for the new pattern in the Description text box.
4. Enter start times and end times that you want for each day of the week.

   On each day's row, the drop-down lists on the left set the start time (in hours and minutes). The drop-down lists on the right set the end time. If you enter blank times (available at the top of the drop-down lists), you are indicating “no preference.”

   Times are displayed in 12- or 24-hour format, depending on your computer's regional settings. A leading plus sign (+) indicates that the end time falls within the next day.
5. After you have entered the information, click Apply.

   The new pattern is now included in the Select pattern drop-down list.

Editing an Availability Pattern

To edit a previously created availability pattern:

1. In the Availability Patterns window, select the pattern from the Select pattern drop-down list.

The pattern properties appear in the start time and end time drop-down lists.

2. Change the start times and end times.
3. Click Apply.

Deleting an Availability Pattern

To permanently remove an availability pattern:

1. In the Availability Patterns window, select the pattern from the Select pattern drop-down list.
2. Click Delete Pattern.

Creating an Availability Preference

To create an availability preference based on an availability pattern, see Creating and Editing Availability Preferences.

Adding and Editing Preferences

Use the Preferences window to:

- View your preferences and exceptions.
- Add or edit your preferences.
- Delete your preferences.

Note: You cannot edit or delete exceptions or granted preferences. If you need to change an exception or a granted preference, contact your supervisor.

Viewing Preferences or Exceptions

Each day's bar in the Preference window's Weekly Preferences grid shows preferences and exceptions as segments covering the preference or exception timesteps. The Legend indicates which colors represent exception and preference statuses.

Add or Edit a Preference

To add or edit a preference from the Preferences window's Weekly Preferences grid or Daily Preference list:

1. Click the name of the day to contain the preference, as shown in the following figure.

The Edit Weekly Preferences window appears.

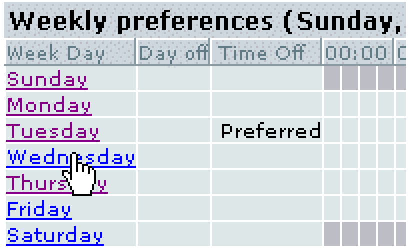


Figure 7: Edit Weekly Preferences window

2. Select the check box for the preference type.

Note: You can enter one preference of each type for each day.

3. For Shift preferences, select the shift name from the drop-down list.
4. For Shift and Availability preferences, set the Start time and End time.
5. Click Comment... if you want to make a comment concerning this preference request.
6. Click Submit.

   If WFM can schedule your preference, the new or revised preference appears in the Preferences window.

   If WFM cannot schedule your preference, an error window identifies the rule that was violated. Click Back to correct the problem.

Note: Your preferences are not guaranteed to be assigned to you unless your supervisor grants them prior to scheduling. If your preferences are not granted, WFM schedules as many preferences as possible according to the rules configured for your site.

Deleting a Preference

To delete a preference from the Preferences window's Weekly Preferences grid or Daily Preference list:

1. Click the name of the day that contains the preference.

   The Edit Weekly Preferences window appears.
2. Clear the check box next to the preference you want to delete.
3. Click Submit.

   The Preferences window reappears. The deleted preference no longer appears in the display.

Chapter

4 Time Off

This chapter covers the following topics:

Time Off Overview

Note: If you do not see "Time Off" in the Menu Bar, then the Time Off Planner is not enabled for your contact center.

Use the Time Off window to:

- View your requested time off, with its status.
- Request time off.
- Remove time-off requests that have not yet been granted or scheduled.
- View your time-off balance for any desired date.

To use Time Off:

- Click Time Off in the Menu bar.

The Time Off window includes:

- A drop-down list with all the time-off types available to you.
- The time-off balance pane.

- A 12-month calendar for the current year.
- A legend, explaining the significance of the colors used in the calendar.
- Three command buttons (New, Edit, and Delete) that you can use to make, change, or delete time-off requests.

The Time Off Window

The Time Off window includes two main sections:

- The Calendar, which shows time-off requests and their status. Days for which you have time-off requests are shown in color. This color changes depending of the status of the request.
- The Balance pane, which shows your time-off balance for the time of time off that you selects in the drop-down list in the upper left corner of the Time Off window.

  The Legend at the bottom of the Balance pane indicates what each color means.

The Time Off Calendar

Each date on the calendar has a check box next to it.

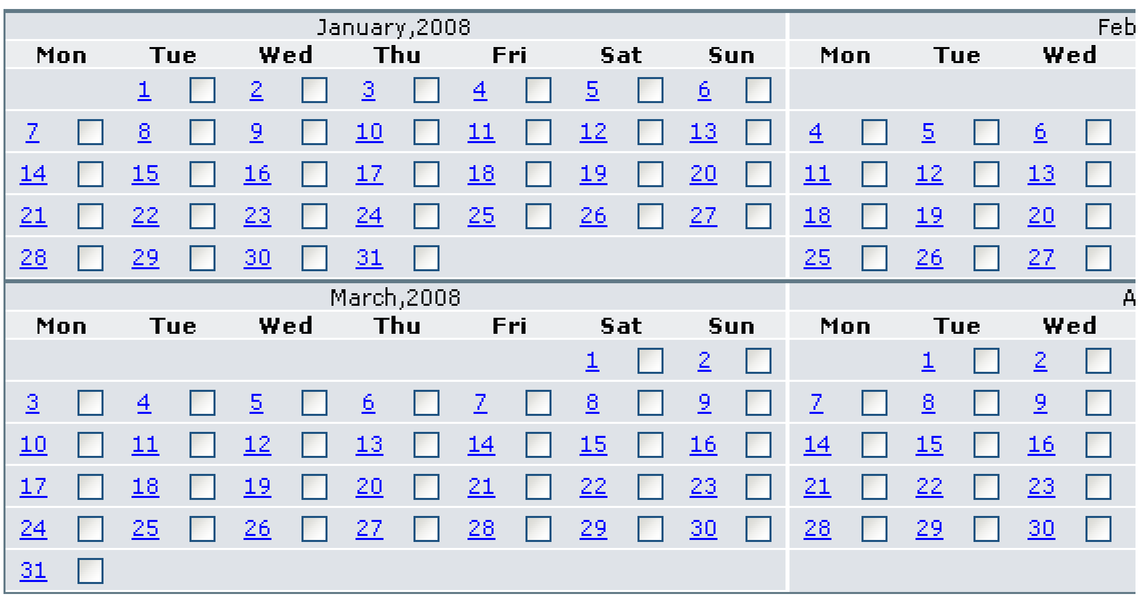


Figure 8: Time Off Calendar

- To create a new time-off request, select one or more check boxes and then click New. See Requesting Time Off for more on creating a new time-off request.

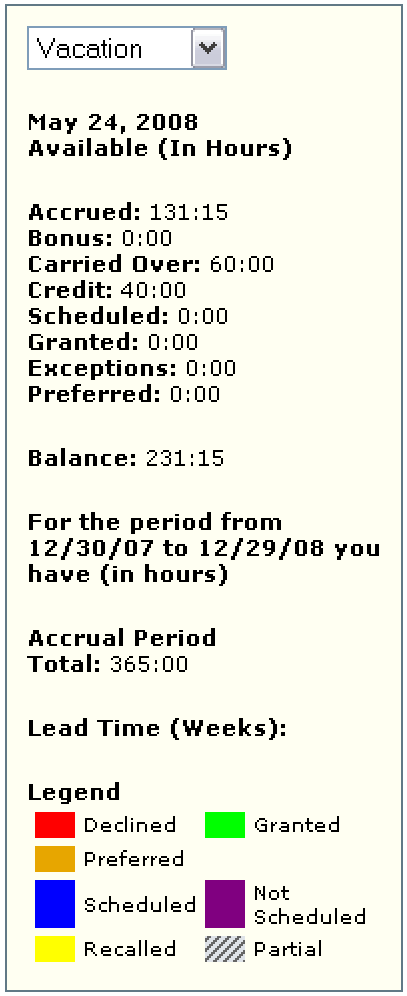
- To change an existing time-off request, select one or more check boxes next to dates that have time-off requests entered for them and then click Edit. See Editing Time Off for more on editing an existing time-off request.
- To delete a time-off request, select the check boxes for one or more dates that have time-off requests attached to them and then click Delete. See Deleting Time Off for more information about deleting a time-off request.
- To display all existing time-off data for a particular day in the Calendar, hover the cursor over that day's cell. A pop-up window displays all the time-off data that exists for that day, which can include: Date, Name, Start/End Time, Status, Reason, Comments.
  - **Comments** are notes that are entered by a supervisor or manager when the time-off item is either granted or declined.
  - **Reason** is a field that explains why the WFM system put the time-off item in a particular status such as Declined or Not Scheduled.

The Balance Pane

To see your balance for a specific time-off type:

- Select the time-off type from the drop-down list at the top left part of the Time Off window.

Note: The information in the balance pane is for the selected time-off type only (in the image below, the time-off type is Vacation). Use the drop-down list box to select a different time-off type, to see your balance for that type. Inside the list box, the time-off types that you can request and edit are listed above the Others legend, and the time-off types that you cannot use are listed below it.



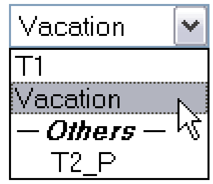


Figure 9: The Balance Pane

The following explains each category that appears on the balance pane.

Time Off Hours Section

Accrued—Total accrued time-off hours for the current period, up to the selected day. (To view the total accrued hours for the entire period, select the last day of the period.)

Bonus—Total bonus time-off hours. Bonus hours are configured by your supervisor or scheduling manager. They are included in your total time-off balance.

Carried Over—Total time-off hours carried over from the previous period. Some companies limit the number of hours that you can carry from one year to the next.

Credit—Total time-off hours that can be taken in advance, if applicable. (Some companies allow you to request more time off than you currently has accrued, with the expectation that you will accrue the necessary time before the end of the year.

Scheduled—Total scheduled time-off hours for the period, up to the selected day. To view the total scheduled hours for the entire period, select the last day of the period. You cannot remove Scheduled or Granted time off that is in the Time Off module, but can remove Preferred time off.

Granted—Total requested time-off hours that have been granted. To view the total granted hours for the entire period, select the last day of the period.

Exceptions—Total part-day exceptions used as time-off hours that have been granted.

Preferred—Total hours of preferred time off (requested, but not yet declined, granted or scheduled). To view the total preferred hours for the entire period, select the last day of the period.

Balance—Total time-off hours for the current period, up to the selected day. The balance is calculated as the sum of accrued, bonus, carried-over, and credit hours (also listed in the Configuration Utility as the “Advanced Hours” window), minus granted, preferred, part-day granted, and scheduled hours.

Note that the limit to this balance (which is set in the Configuration Utility with the control Limit Max Time Off Balance) can be exceeded. If the limit is reached before the end of the Accrual Period, an agent can progressively accrue more time off if he requests it, and his Supervisor grants it.

Accrual Period Total—Total hours of time off for which you are eligible in the current period. This value changes only when you select a day in a different time-off period.

Lead Time (Weeks)—If the supervisor has enabled time-off auto-granting, you can enter your time-off preferences at least this number of weeks before the first desired time-off date.

Your preferences are granted automatically if your absence would not excessively burden the company, and if you have enough time-off hours available to cover the request.

Legend—Each status Declined, Granted, Preferred, Scheduled, Not Scheduled, Recalled, and Partial is represented by its own color. Partial indicates a part-day time-off request.

Each date in the calendar is also a link. Click the date link to update the balance pane so that it shows your time-off balance for the date you clicked instead of for the current date.

For example, click the date for the day before you would like to take a vacation to see whether you will have accumulated enough time off by then to take your vacation.

Note: The information is for the current time-off period. This is the time since the last carry-over date (often January 1), or, if the carry-over date has not yet occurred, the time since your date of hire. The carry-over date may be different for the different types of time off.

When Time Off Types No Longer Apply

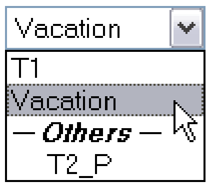


Figure 10: Time Off Types Drop-down List

A drop-down list box in the upper-left corner of your Time Off Planner displays all the time-off types that are configured for your site. Some of these may not relevant for you. (Agents are assigned to time-off rules, which in turn are associated with time-off types.)

Beginning with release 7.6, you can create, edit, delete, or recall time-off requests only for types that correspond to a time-off rule assigned to that agent. So, you may be able to view time-off types corresponding to time-off rules that are no longer assigned to you. You can see these “old” time-off types, but you cannot interact with them. They appear below the Others legend in the drop-down list.

The time-off types that you can use appear above the –Others– legend.

Workforce Management (WFM) will allow you to select a time-off type from below the –Others– legend in the drop-down list box, but you will not be able to perform any functions with it (such as requesting time off or viewing your time-off balance).

Time Off Limits Grid

The Time Off Limits grid appears above these dialog boxes: Inserting New Time Off Items, Editing Time Off Items.

The grid area displays time-off limit information for the dates that were selected in the main time-off planner view. Each day of the agent's schedule appears in a separate row, divided into timesteps. Dates that are not in sequential order are visually separated by empty narrow rows.

Grid Columns and Controls

The **check box** in the leftmost column of each row is clear to affect only this row. Select or clear the check box in the header to operate all check boxes in the column (and thus, all rows) with one click.

Date displays the date and weekday for each row.

Time steps displays each timestep as a cell in a grid. Point the cursor at a timestep to display the time off limits for that timestep in a pop-up window.

Full view check box above the grid expands and compresses the display.

- Select this check box (the default setting) to compress the display: each hour in the grid gets a header title.
- Clear this check box to expand the display: each 15-minute timestep gets a header title, and each cell in the grid displays its time-off limit value as an integer rounded downward.

Grid Characteristics

Each cell in the grid presents a color code for the time-off limit of the timestep that it represents:

Red—The time-off limit for this timestep is 0 or less.

Green—The time-off limit for this timestep is 1 or more

Variable Grid Characteristics

If you are entering new Time Off items:

- All check boxes are selected by default.
- The new Time Off items that you insert apply only to dates that are checked in the grid.

If you are editing Time Off items:

- The check box column of the grid does not appear, which means that the individual check boxes for each row do not appear.

Note: If you are deleting or recalling Time Off items, the grid and the Full View check box do not appear.

Requesting Time Off

Use the Time Off calendar to add a new time-off request, or to recall an existing request. See “Recalling an Existing Time Off Request” on page 49.

1. Select the check box next to each date for which you want to add a time-off request.
2. Click New.

   The Inserting New Time Off Items dialog box appears.

   The Time Off Limits grid appears at the top of this dialog box. In the grid, Timesteps that this agent cannot select (because of limits or constraints) are colored red.
3. Select the time-off type from the drop-down list.

   Time-off types which appear below the Others legend in the drop-down list box in the Time Off window are unavailable to you and cannot be selected.
4. If this is a request for a full day off, select the Full Day check box.

Notes: If you work a different number of hours on different days of the week, you must enter the number of paid hours here so the system deducts the appropriate hours from your time off balance. Specify the exact hours and minutes in your full day by entering or selecting them in the Paid Time combo box. Prerequisites:

- You must check the Full Day check box and the Paid Time check box.
- The WFM system must be configured (by your system administrator) to allow agents to enter paid time for full-day time off requests.

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5. For part-day requests, clear the Full Day check box and enter a start and end time for the request.
6. If you want to enter a comment that your supervisor may choose to consider when deciding whether to grant the time-off request, click Comment... and then enter your comment in the Editing Comments dialog box.
7. If you want your request to be wait-listed, click the Wait-list check box. Then, if your request is denied, your Supervisor will see this request in his Calendar view with the status Preferred. If somebody declines Time Off or the limit is increased, your Supervisor could then decide to Grant your Time Off request.
8. Click Submit. Or, to discard a request, click Cancel.

   If WFM successfully processes your requests, the Time Off window reappears and displays your new time-off settings.

   If the server returns error messages, an error window lists them. Click Back to correct the problems.

Recalling a Request

To recall a time-off request that has the status Preferred or Granted but has not yet been scheduled, select the day where you requested the time off and then click the Recall button.

Notes: You can recall a time-off request only if it was granted automatically (that is, the auto-grant option was set to On when you made the request).

You cannot recall a time-off request if your Supervisor granted it manually.

The Time Off Autogrant Feature

If your supervisor enables autogranting, your time-off requests are immediately granted if:

- All the requested days come after the specified lead time. The lead time is shown on the balance pane.
- The time-off request is for more hours than the minimum required for the auto-grant feature to apply.
- Your absence does not exceed time-off limits established by your supervisor.
- You have accrued enough time-off hours to cover your time-off request.

If the auto-granting feature is disabled, your time-off requests are entered in Preferred status and a supervisor must grant your requests before they can be included in your schedule.

Your Request Values Are Verified

When you specify either start/end or paid time in a time-off request, WFM verifies the values against these configured constraints: contract availability, minimum of earliest start of all available for the day shifts, maximum of latest end of all shifts.

Editing Time Off

Use the Time Off calendar to edit existing time-off requests.

1. Select the check box next to each date for which you want to edit a time-off request.
2. Click Edit.

   The Editing Time Off Items dialog box appears. It shows all time-off requests for the days you selected. By default, all are selected.

Note: The Time Off Limits grid appears at the top of this dialog box.

3. Clear the check boxes for time-off requests that you do not want to edit.

Note: You cannot clear (or select) the check box for a time-off type that you can no longer use. (These time-off types appear below the Others legend in the drop-down list box in the Time Off window.)

4. Change the time-off settings for the requests you want to edit.
5. If you want to enter a comment that your supervisor may choose to consider when deciding whether to grant the edited time-off request, click comment... and then enter your comment in the Editing Comments dialog box.
6. Click Submit. Or, to discard your changes, click cancel.

If WFM successfully processes your requests, the Time Off window reappears and displays your new time-off settings.

If the server returns error messages, an error window lists them. Click Back to correct the problems.

Note: You can Recall a time-off Request.

Deleting Time Off

Use the Time Off calendar to remove previously-made time-off requests.

Note: If a time-off request is Scheduled or Granted, and the auto-granting feature is off, you cannot use Time Off to remove the time-off request. A supervisor must make the change in WFM Web for Supervisors.

If the auto-granting feature is enabled, you can remove Granted time-off that is beyond the auto-granting lead time listed in the balance pane.

For example, if the Granted time off is three weeks away and the lead time is set to two weeks, you can remove the Granted time-off request. However, if the time-off is only one week away, you cannot.

To remove time-off requests:

1. Select the check boxes for the days with time-off requests you want to delete.
2. Click Delete.

   The Deleting Time Off Items window opens. It shows all time-off requests for the days you selected. By default, all are selected.

3. Clear the check boxes for time-off requests that you do not want to remove your time-off preferences. All selected time-off requests will be deleted.

> Note: You cannot clear (or select) the check box for a time-off type that you can no longer use. (These time-off types appear below the Others legend in the drop-down list box in the Time Off window.)

4. Click Submit. Or click cancel to keep your time-off requests on the calendar.

The Time Off window reappears, displaying your updated time-off settings.

Recalling an Existing Time Off Request

Use the Time Off Calendar to add a new time-off request, or to recall an existing request:

1. Select the day where you requested the time off.
2. Click the **Recall** button.

   WFM displays your recall request(s) in the Recalling Time Off Items window, with a separate line for each day.
3. If you decide not to submit the recall request for a day in the list, clear the check box at the far left of that day's line.
4. Click the **Submit** button at the lower right.

The recalled time off is marked in the calendar with the status Recalled or Scheduled, Recalled. If your company uses WFM's notification functionality, then WFM sends a notification to the appropriate supervisor.

- The status Recalled indicates that the item was completely recalled and no longer affects the agent’s schedule.
- The status Scheduled, Recalled indicates that the agent’s recall request was received, but the item is not yet recalled. The item will remain active and in the agent’s schedule until a supervisor removes the time off from the schedule.

Entering Comments

You can make comments when you make a preference or time-off request. Your supervisor may choose to consider these comments when deciding whether to grant or deny preferences and time-off requests.

To enter comments:

1. From the Edit Weekly Preferences window or the Time Off window, click comments...

2. Enter your comment.
3. Click OK to save the comment or Cancel to close the dialog box without saving the comment.

The dialog box closes. Your comment appears in the Daily Preference list.

Chapter

5 Schedule Bidding

A Supervisor creates a bidding scenario, and Agents bid on the schedules in that scenario that they want.

This chapter covers the following topics:

Schedule Bidding Overview

Agents can access a bidding scenario only during the Schedule Bidding period (the time period between the Start Date/Time and End Date/Time for bidding).

Follow these steps:

1. At any window, click the Bidding link on the menu bar.

> Note: If you do not see Bidding in the menu bar, bidding may not be configured for your call center.

2. At the Bidding Scenarios View (page 52), select a bidding scenario.

> Note: If no bidding scenarios are listed, then there are no scenarios currently open for you for bidding.

3. At the Bidding Assignment Window (page 52), perform any of these tasks:

- Sort (page 57) or Filter (page 56) the view of available shifts.
- Rank the schedules (page 53) and bid on them by numbering them 1, 2, 3 and so on. You can view and revise your bids up until the End Date/Time in separate Desired (page 57) or Unwanted (page 58) lists.

Bidding Scenarios View

You reach this view by clicking on Bidding in the menu bar.

This view displays all scenarios which are available for bidding, and you can open any of those scenarios to view schedules and assign bids. Each row in this view displays one bidding scenario, and these columns present information about each bidding scenario:

Scenario Name displays the name of a bidding scenario.

Bidding End Time displays the bidding scenario's bidding end date/time.

Days Remaining displays number of remaining days until the scenario closes for bidding.

Scenario Start displays the first date for which the schedule will be effective.

Scenario End displays the final date for which the schedule will be effective.

Opening a Bidding Scenario

To examine a bidding scenario:

1. Click on its link in the Scenario Name column.

The Bidding Assignment window for that scenario opens.

Bidding Assignment Window

You reached this window by clicking on the name of a bidding scenario in the Bidding Scenarios View.

As an agent, you can only access a bidding scenario for a specific period of time, which is known as the bidding window. The bidding window closes on the date and time that are labeled Bidding End Time in the upper left portion of the screen.

To modify and navigate the Bidding Assignment window:

1. Click one of these controls:

Sort button—Sort the rows by day of the week, earliest shift start, earliest meal start, total weekly paid hours, ascending or descending.

Filter button—Filter the rows by days of the week, days off, shift start, first meal start time.

View drop-down menu—Display schedule information in the grid below, in one of these selected formats: start/end time, shift name, total daily paid hours, meals start/end times.

All button—Display all schedules regardless of how your ranked them (default).

Desired button—Display only the schedules that you ranked as Desired.

Unwanted button—Display only the schedules that you ranked as Unwanted.

Previous *n* button—Display the previous n schedules.

Next *n* button—Display the next page, which contains n schedules (except for the final page, which may contain fewer).

Click the Apply button, or click Cancel to abandon the dialog without making your changes.

To Rank a Schedule

Select the check box in the far right column for each schedule that you wish to affect.

Click one of these controls to indicate your bids:

Add to Desired button—Rank the selected schedules by adding them to the Desired view. Immediate results appear, as a ranking number in the Bid column of each selected shift. (These numbers are unique and consecutive, starting with one: 1, 2, 3, 4...)

Add to Unwanted button—Rank the selected schedules by adding them to the Unwanted view. Immediate results appear, as a [bracketed] ranking number in the Bid column of each selected shift. (These numbers are unique and consecutive, starting with one: 1, 2, 3, 4...)

Remove button—Remove all selected schedules from the Desired or Unwanted current views. (You cannot remove anything from the All view.)

The Schedules Grid

The grid displays information about the available schedules. The information varies

depending on the View selected. Default: Start/End Times. The grid columns are:

Name column—Displays the schedule name (e.g. “<Agent 12>” in the screen shot) and week numbers if the schedule bid is longer than one week.

Days of the Week column—Each column displays schedule information for a day of the week, depending on the View selected. The Views are named (and they display the corresponding named values) for each day's shift and total for the week:

- Shift Start/End Times

- Shift Names
- Total Daily Paid Hours
- Meals Start/End Times

Note: Regardless of the View selection, this column can also display the name of full day activity which is not a shift and/or does not have Time defined.

#—Displays the number of instances of this exact schedule that are available to be bid on across the contact center. For example, if the number in this column is 3, then 3 different agents can be granted this particular schedule.

Total Paid column—Displays the total paid hours for the week, for each schedule.

Bid column—Displays your current bid for this particular schedule.

Check box column—Displays a check box for each schedule bid. To use it, select a check box to select the schedule on the same line.

- Click Add to Desired or Add to Unwanted to add the selected schedule to the corresponding list.
- Click Remove to remove the selected schedule from the list that it is currently on.

You can select multiple schedules.

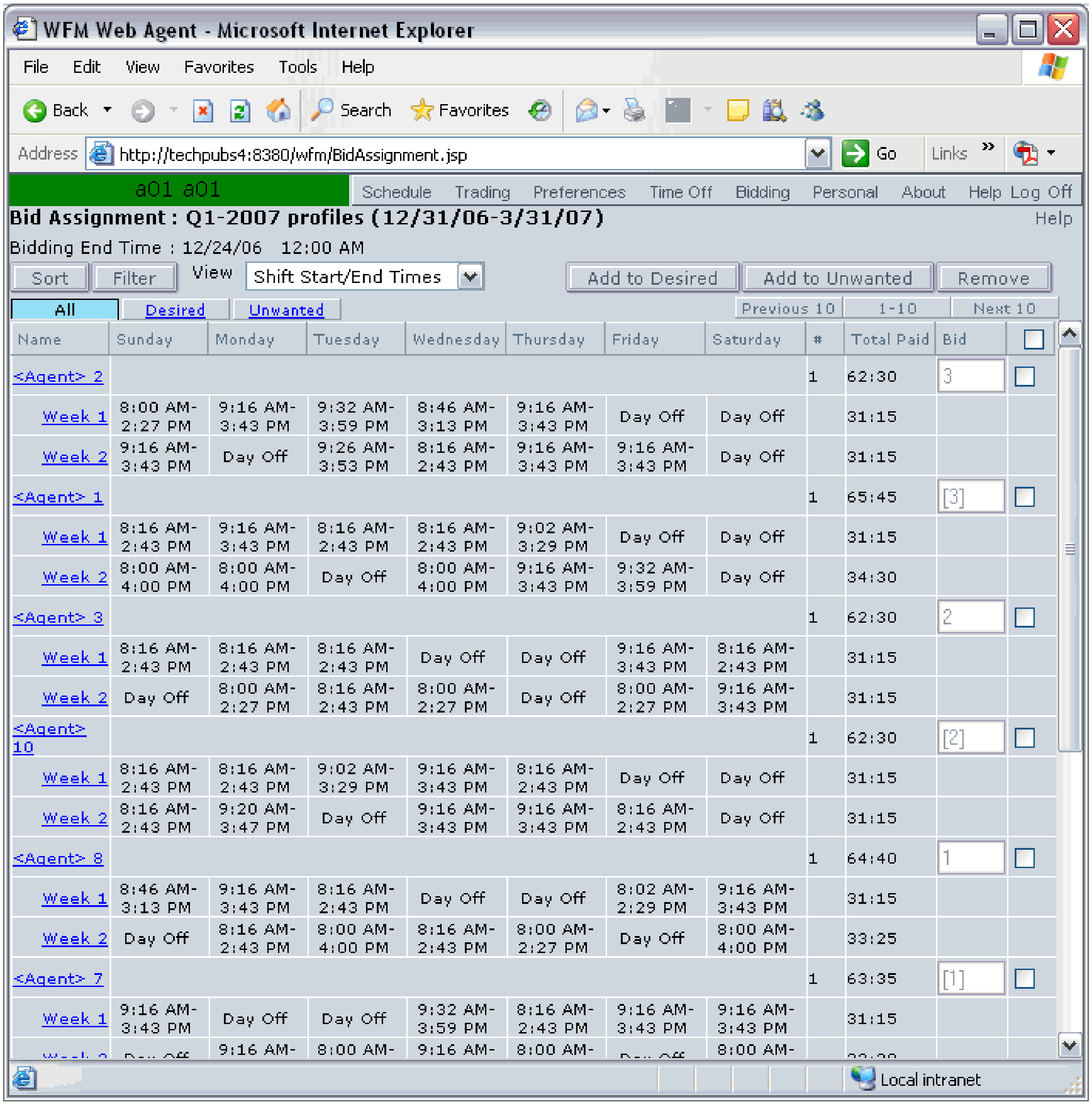

Figure 11: Schedules Grid

Bidding Details View

You reach this view from the Bidding Assignment window, by clicking on one of the schedule names, or on a week within any schedule.

- Click on the name of a multiple-week schedule name to display all weeks in that schedule.
- Click on a single week within a multiple-week schedule (or on the name of a 1-week schedule) to display a single week.

Understanding the Bidding Details View

The top line of this view displays the schedule name on the left side and the schedule date range on the right side. The columns are:

Date column—Shows each date during the week.

Paid hours column—Shows how many hours of paid work you are scheduled for on each day.

Schedule details column—Shows what activities you are scheduled to perform each day. This column also shows break information.

Scheduled attendance Start time column—Shows when you are scheduled to start your shift and the start time for each activity and break during your workday.

Scheduled attendance End time column—Shows when you are scheduled to end your shift and the end time for each activity and break during the workday.

Bidding Assignment Filter View

You reach this window by clicking the Filter button in the Bidding Assignment window.

- Use the Filter dialog to limit the display of available schedules in the Bidding assignment window, in this way: Select days of the week and then a second characteristic which will apply to schedules which have shifts on those days.
- Select some or all of the Days of the Week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) for each week.
- Your next selection(s) will apply only to schedules which have shifts on those days.

Default setting: all days selected.

Show All—Undo all current filtering by disabling all other possible choices. Display all schedules.

By Days Off—Display only schedules which match the full Days Off that you select.

By Shift Start—Display only schedules with shifts that start no earlier than your **Earliest Start Time** setting and no later than your **Latest Start Time** setting, on your selected days.

If you select the check box, both fields are required.

And First Meal Time (a check box that is enabled only if By Shift Start is selected)—Also, display only schedules that have shifts with a first meal that starts no earlier than your Earliest Start Time setting and no later than your Latest Start Time setting.

Click the Submit button to apply your choices, or click Cancel to abandon the dialog without applying them.

Bidding Assignment Sort View

You reach this window by clicking the Sort button in the Bidding Assignment window.

Use the Sort dialog to display the available schedules in the Bidding assignment window in a special order, in this way:

1. Select a day of the week and then a second characteristic which will apply to schedules with shifts on that day.
2. Select one of these radio buttons:

   Day of the Week—Select one day only: Sun, Mon, Tue, Wed, Thu, Fri, Sat.

   Earliest Shift Start—Sort by shift start time (default). Days Off are listed after all schedule days with shifts.

   Earliest Meal Start—Sort by first meal start time. Schedules which contain shifts without meals are listed after all schedules which contain shifts with meals.

   Total Weekly Paid hours—Sort by total weekly paid hours.
3. Select a sorting method: either Ascending or Descending.
4. Click the Submit button, or click Cancel to abandon the dialog without making your changes.

Bidding Assignment Desired View

You reach this window by clicking the Desired tab in the Bidding Assignment window. Use the Desired View to reorder your bids for schedules that you want.

Ranking Your Bids

Your bids are already ranked when you reach this window; that happened when you clicked Add to Desired in the Bidding Assignment window. Your most desired bid is numbered 1.

To change a single bid:

1. Select the number in the Bid column box, and enter a different number.

> Note: If you change the rank of one of your bids and click Apply, the rest of your bids will be renumbered accordingly.

2. Click Apply to implement your change, or Cancel to abandon it.

Repeat as necessary to achieve the bid order that you want.

Removing Schedules from the Desired View

To remove one or more shifts from the Desired View:

1. Select the check box in the far right column of every schedule that you wish to affect.
2. Click the Remove button to remove the selected schedule(s) from the Desired View and set the bid ranking to 0.

   or

   Click the Unwanted button to move the selected schedule(s) to the Unwanted View.

Bidding Assignment Unwanted View

You reach this window by clicking the Unwanted tab in the Bidding Assignment window. Use the Unwanted View to reorder your bids for schedules that you not want.

Ranking Your Bids

Your bids are already ranked when you reach this view; that happened when you clicked Add to Unwanted in the Bidding Assignment window. Your most unwanted bid is numbered 1.

1. Select the number in the Bid column box, and enter a different number.

> Note: If you change the rank of one of your bids and click Apply, the rest of your bids will be renumbered accordingly.

2. Click Apply to implement your change, or Cancel to abandon it.

Repeat as necessary to achieve the bid order that you want.

Removing Shifts from the Unwanted View

To remove one or more shifts from the Unwanted View:

1. Select the check box in the far right column of every shift that you wish to remove.
2. Click the Remove button to move the selected shift(s) to the All View and set the bid ranking to 0, or
   Click the Desired button to move the selected shift(s) to the Desired View.

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