Genesys Engage cloud Workforce Management 8.5.1 Guide
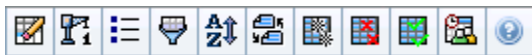
Master Schedule Weekly View

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Master Schedule Weekly View

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Workforce Management in Genesys Engage cloud.

Use the **Master Schedule Weekly** view to display a summary table of total paid hours, working start/end times, or shift names, for all selected agents (who can be under multiple sites but must all be under the same business unit). See the toolbar image here and the button descriptions below.

> **Important**
> You can also see a summary table of total paid hours, working start/end times, or shift names for your schedule planning period. See Mode for details.

When displaying the **Master Schedule Weekly** view, you can use the Intra-Day Schedule Rebuild Wizard.

The following sections cover:

- Displaying the Weekly view.
- Using the Weekly view table.
- Customizing the Weekly view.

Displaying the Master Schedule Weekly View

To display the **Master Schedule Weekly** view:

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu on the toolbar, select **Weekly**.

4. On the **Objects** pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.

   You can expand business units to display their sites, and you can expand sites to display their teams and agents. You can select multiple sites, teams, and agents, but only one business unit.

5. Click **Get data** to populate the **Weekly** view table for the selected agents.

You can search the table for particular agents using the **Find Agent** dialog box. To open it, select **Find** from the **Edit** menu or press **Ctrl + F**.

Using the Table

The **Weekly** view table contains rows for each agent that you selected in the **Objects** tree. (If a scroll bar is displayed to the right, you can use it to reveal more agents.) This table includes the following columns:

[Expand/Collapse]	If in **Planning Period** mode, the first column provides expand/collapse controls that you use to display or hide agent details.
Team	This column lists each agent's team.
Agent	Two columns show an icon representing each agent's contract and the agent's name.
[Week Start Dates]	If you display agent details and you are in **Planning Period** mode, the rows below each agent's name indicate the start date for each week in the schedule.
[Weekdays]	These cells show agent schedule information for each weekday, for each week in the schedule. The cells' contents correspond to your selection from the **Show Data for** drop-down list. If an agent is not scheduled for a shift on this day, the cell will contain: **Day Off**, **<name of the full-day time-off type>**, **Working Hours** (for scheduled working hours without a shift), or an exception name (for scheduled full-day exceptions). An icon in the cell for a weekday indicates whether the schedule has been changed for that agent. • If the agent's schedule for that day was assigned during scheduling or rescheduling, no icon appears. • If the agent's day was edited after scheduling or rescheduling, a light-gray pencil icon appears. • If the agent's day was assigned by trading or swapping, the swap icon appears. • A yield icon (upside down red triangle) appears if there are pending changes. Pending changes must be committed by a user with **Approve**

	Changes security permission. • An icon and red check box appears for every schedule day that contains a granted calendar item (if the option **Show agents with granted and scheduled rotating pattern or any other calendar preference** is selected in the **Options** dialog box). Tip If there have been multiple changes, the icon represents the most recent status.
Weekly Totals	Shows an agent's total working hours for the displayed week.
Planning Period Totals	Shows an agent's total paid hours for the schedule planning period. Important To set this period's duration and start date, see the **Configuration > Polices > Contracts > Site Settings tab**.

The **Weekly Totals** and **Period Totals** boxes below the table show a grand total of all weekly or planning period total paid hours (respectively) for all selected agents.

Customizing the Master Schedule Weekly View

To customize the displayed table, use these controls at the top of the working pane:

Show Data for

From this drop-down list, select what you want to display inside each day's table cell:

Total Paid Hours	Total working time for the day.
Start/End Times	Start and end times of agents' work.
Shift or **Schedule State Names**	Names of agents' assigned shifts and other full-day states.

Mode

Select one **Week** or **Planning Period** from the **Mode** drop-down list. The table displays data for the selected period. If no schedule planning period is configured, or if more than one site is selected on the **Objects** pane, then the **Planning Period** option is disabled.

Planning Period Mode

Planning Period mode displays schedules for the entire planning period. White and dark gray indicate the type of date range that you are viewing.

Planning Period Color Legend

- **White**—Indicates dates that fall within the planning period.
- **Dark Gray**—Indicates dates that are outside the planning period.

Date

Use the standard date-selection controls to move to other weeks.

Toolbar Buttons

You can use the following buttons on the **Actions** toolbar (or commands in the **Actions** menu) to further customize the displayed table:

![icon]	**Cleanup**	Opens the Cleanup Master Schedule window. Enables you to delete Master Schedule information for selected dates and agents.
![icon]	**Rebuild Intra-day Schedule**	Opens the Intra-day Schedule Rebuild Wizard to rebuild an Intra-Day schedule for a specific day or time period for a site, team, or agent.
![icon]	**Options**	Opens the Options dialog box. Enables you to select/de-select the Agent Rank and Site Name columns.
![icon]	**Filter**	Opens the Filter dialog box. Enables you to filter the displayed information according to activities and contract types. (If you set a new filter, this immediately refreshes the view.)
![icon]	**Sort**	Opens the Sorting dialog box, which allows sorting by Team Name, Contract, Agent Name (first or last), Agent Rank or Site Name. You can sort in ascending or descending order. Note that Agent Rank sorts in apparent reverse order due to limitations imposed by multi-sorting by both agent name and rank.

	Swap	Enables you to swap two agents' schedules with the Swap Agent Schedule Wizard.
	Insert Multiple	Opens the Insert Multiple Wizard, which enables you to add multiple items to the Master Schedule at one time.
	Delete Multiple	Opens the Delete Multiple Wizard, which enables you to remove multiple items from the Master Schedule at one time.
	Commit/Rollback Multiple	Opens the Commit/Rollback Multiple Wizard, which enables you to insert pending changes into the Master Schedule or to remove them and return the Master Schedule to its former settings.
	Meeting Scheduler	Opens the Meeting Scheduler Wizard.

Important

You can save changes from within the **Master Schedule Weekly** view only if you have appropriate access rights.