Workforce Management Web for Supervisors Help

List of Trades View

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List of Trades View

Use the List of Trades view to review and manage agents' pending schedule trades. The view displays a table of agents' proposed schedule trades, standard date-selection controls, buttons to accept or decline each pending trade, and a drop-down list that modifies the table's contents.

Multi-Site Trading

If multi-site trading is permitted in your environment, it enables agents to trade across different sites within the same business unit. This means you might see the same trade under two different sites, if the trade participants are located in different sites.

Depending on which sites you have access rights to, you can either fully approve the trade or partially approve it (if you have access rights to only one of the two sites in the trade). When you partially approve a trade, you receive an appropriate warning message (that the trade needs further approval) and the trade remains in **Pending** status until a supervisor with the required site access rights completes the trade approval process.

Displaying the List of Trades

To display the List of Trades view:

1. In the Modules tree, click **Trading** > **List of Trades**.
   The List of Trades view appears.
2. In the Objects tree, select a site, teams, and/or agents.
   You can expand business units to display their sites and you can expand sites to display their teams and agents. You can select any number of agents and/or teams within a single site.
   Trades can occur only between agents in the same site. If you select a new site or its teams/agents, this clears any previous selection that you made within a different site.
3. Click **Get data** to populate the table for the selected agents.

Using the Table

The **List of Trades** table shows all of the proposed schedule trades that meet the following criteria:

- At least one trade participant is among the agents that you selected in the Objects tree.
- The trade can still be accepted or declined. (Once accepted or declined, trades no longer appear in the table.)
- The trade is within the selected week. (To see other weeks, use the date-selection controls at the upper right.)

Each proposed trade appears on two rows. (If a scroll bar appears to the right, you can use it to reveal more trades.) The table includes the following columns:

Dates	Start and end dates for the proposed trade.
Agent Name	Names of both agents involved in the trade.
[Weekdays]	Agent schedule information for the specific day in the trade. The cell contents correspond to your selection from the Show data for drop-down list. If the agent is not scheduled for a shift on this day, the cell contains: **Day Off**, **Vacation**, **Working Hours** (for scheduled working hours without a shift), or an exception name (for scheduled full-day exceptions). A blank cell indicates that this day is not included in the proposed schedule trade.
Paid Hours	Total paid hours in the trade proposal.
Details	Button to display schedule details for both agents involved in the trade.

Accepting or Declining Trades

To accept or decline proposed trades:

1. Select one or more trades in the table to select them.
2. Select one of the following options from the view's right side (or on the **Actions** menu):
   - **Accept**—Opens the Comments window for you to add an (optional) comment and approve the selected trade(s)
   - **Decline**—Opens the Comments window for you to add a (required) comment and reject the selected trade(s).

Show Data for

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

Total Paid Hours	Total paid hours for each day.
Working Start/End Time	Start and end times of agents' work. (Default display option.)
Shift or Schedule State Names	Names of agents' assigned shifts for each day.