Workforce Management Web for Supervisors Help

Managing Meetings

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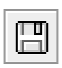
Managing Meetings

Use the procedures in this topic to create, edits, delete, copy, and add participants to meetings.

Creating Meetings

Link to video

To create a meeting:

1. In the **Policies** module, select **Meetings**.
2. Select a site or business unit (this action selects all indented sites beneath it) on the **Objects** pane.
3. Click **New**  .
   The Properties tab opens, by default.
4. Configure the settings, as described in the **Properties**, **Participants**, and **Associated Sites** tabs, as required.
5. Click **Save**  .
   The new meeting appears in the Meetings pane.

Adding Participants to Meetings

To add participants to a meeting:

1. In the **Meetings** pane, select a meeting and then, click the **Participants** tab.
2. Click **Add**  .
3. In the **Available Agents** pane, select one or more agents.

> **Tip**
> You can also filter, sort, or search agents in the list of available agents.

4. Click **Apply**  .

The selected agents move to the **Agents** list in the **Participants** pane.

Alternatively, you can click **Close** to close the pane without saving your selections.

Important

- Agents can appear in only one pane at a time.
- Only agents from the meeting site are available for selection.
- When a schedule that includes the meeting time is generated, Scheduler verifies that enough agents are available to satisfy the **Minimum Percentage** requirement and then assigns the meeting exception to the available agents. If too few agents are available, **Scheduler** generates an error message and does not schedule the meeting.

Editing Meetings

To edit a meeting:

1. In the **Meetings** pane, select the meeting you want to edit.
2. Click any one of the three tabs (**Properties**, **Participants**, or **Associated Sites**) to change its settings.
3. When you are finished making changes, click **Save** .

Deleting Meetings

To delete a meeting:

1. In the **Meetings** pane, select the meeting you want to delete.
2. Click Delete .
3. When the **Confirmation** dialog opens, select **Yes** to proceed or **No** to cancel the action. **If you select Yes, the meeting is deleted and the action cannot be undone.**

Copying Meetings

To copy a meeting:

1. In the **Meetings** pane, select the meeting you want to copy.
2. Click **Copy**  .
3. When the **Copy Meeting** pane opens, enter a name for the meeting.
4. In the bottom half of the pane, click the **Enterprise** list and select the business unit and site, to which you want to associate this meeting.
5. Click **Apply**  .

   Alternatively, you can click Close  **to close this pane and cancel the action. If you do this, the meeting is not copied.**