Workforce Management Web for Supervisors Help

Meetings View Settings

5/4/2025

Contents

Meetings View Settings

You can configure settings in three tabs in the Meetings view (after clicking **New** or selecting an existing Meeting):

- Properties Tab
- Participants Tab
- Associated Sites Tab

At the top of all three tabs you will find the **Save** icon, which enables you to save the meetings settings in a particular tab, and the **Help** icon.

Properties Tab

- **Name**—The name of this meeting, for example, Sales Meeting or Monthly Review. The name must be unique within all sites associated with the meeting. You can also add a memo in this field, Memos in Meeting Exceptions in the *Workforce Management Administrator's Guide*.
- **Exception Type**—You can base a meeting on any exception type that is configured for the current site if you selected the Exception Usage: in Meeting Planner option when creating exception types.
- **Earliest Date and Time**—A proposed time at which Scheduler can assign the meeting to start.
- **Latest Date and Time**—A proposed time at which **Scheduler** can assign the meeting to end.
- **Meeting Duration**—The length of time that **Scheduler** should allot for the meeting.
- **Days of the week**—The days of the week on which **Scheduler** can assign this meeting.
- **Time Zone**—The time zone to use when displaying any time-related information. Set by default to `local` (current user's time zone.)

Meeting Type section: Select one of the following three radio buttons to enable the properties that are associated with them:

- **Single Agent**—A common activity, such as a webinar, that can occur at the most convenient time for each agent.
- **Single Group**—The default meeting type. Represents a single meeting for all agents who are specified on the Participants tab.
  - Enter or select the meeting's minimum number of attendees requirement in the **Required Percentage of attendees** box. Set this value to 1% to schedule a meeting for as many attendees as possible. Using 1% does not require a minimum number of attendees. The default value is `100` percent.
- **Multiple Groups**—A common time, but for multiple groups. Enter or select a number in each of the

following fields to specify the group sizes:

- **Min. Number of Groups**
- **Minimum Group Size**
- **Max. Number of Groups**
- **Maximum Group Size**

Recurrence: section: Select one of the following five radio buttons to enable the properties that are associated with them:

- **Use Total Hours**—The total meeting hours. When you specify this optional parameter, Scheduler creates as many meetings with the defined duration as necessary, to satisfy the Total Hours requirement. For example, if the meeting duration is set to two hours, and **Use Total Hours** is set to six hours, Scheduler generates three two-hour meetings. Scheduler can assign these meetings consecutively.

> **Tip**
>
> The value of **Use Total Hours** is not used for Multiple Groups meetings.

- **Daily**—Occurs once a day.
- **Weekly**—Occurs once a week (unless a value other than 1 is entered in the **Recurs Every** setting).
  - **Recurs Every**—Defines how often the meeting should recur. Examples: 1 (every week), 2 (every other week), 3 (every third week).
- **Monthly**—Occurs once a month.
- **Set Number of Times instead of Latest Date**—If you select Daily or Weekly for the Recurrence type, set a value for the number of consecutive days or weeks during which this meeting should be scheduled. If you check this box and enter a value, a red asterisk and comment appears below the **Latest Date and Time** option, indicating that latest date is being overwritten by the **Number of Times** setting.

> **Tip**
>
> WFM requires that either Number of Times or Latest Date be set, not both.
>
> The current date will be displayed in the **Latest Date** field but this value will not be used to schedule meetings. The **Latest Time** value will be used for scheduling meetings when either **Latest Date** or **Number of Times** is set.
>
> Even though values can be set in all fields, only values for the appropriate meeting type are used for scheduling. For example, **Required Percentage of attendees** will be used only for Single Group meetings.

Participants Tab

Use these controls when you are adding participants to the meetings:

Search *field*	Enables you to enter criteria, used to search for available agents.
Search by: *radio buttons*	Enables you to search for available agents by **First Name** or **Last Name**.
Add Agents	Enables you to add agents to the **Participants** list, by opening a list of Available Agents.
Remove Agents	Removes selected agents from the **Participants** list. This action cannot be undone.
Sort	Sorts the participants list by **First Name**, **Last Name**, **Site**, or **Team**.

The **Participants** tab also displays four columns: **First Name**, **Last Name**, **Site**, and **Team** name of the participants in the selected shared transport.

List of Available Agents

The **Available Agents** pane contains the following fields and controls:

Search *field*	Enables you to enter criteria, used to search for available agents.
Search by: *radio buttons*	Enables you to search for available agents by **First Name** or **Last Name**.
Apply	Applies the agents you select from the **Available Agents** list to the **Participants** list.
Filter	Enables you to filter the **Available Agents** list by **Activities**, **Multi-Site Activities**, or **Contracts**.
Close	Closes the **Available Agents** pane without applying any selections.
Sort	Sort the available agents by **First Name**, **Last Name**, or **Team**.

Associated Sites Tab

1. Select the check box of each site to associate with the current meeting.
2. Clear the check box of each site to disassociate from the current meeting.
3. Click **Save**.