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Workforce Management Web for Supervisors Help

New Schedule Scenario: General Parameters

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New Schedule Scenario: General Parameters

To fill in the first New Schedule Scenario Wizard's **General Parameters** screen:

1. In the **Name** text box, enter a name for the schedule scenario.
2. If you want this scenario to be available to other WFM users, select the **Shared** check box.
3. If you want to base this scenario on one that already exists, select the existing scenario from the **Based on** drop-down list.
Basing your new scenario on an existing scenario is a convenient way to build schedules with frequently used settings. The wizard takes the dates, activities, and agents (real, virtual, and profile) from the source scenario and applies them to the new scenario. You can then change these parameters.
4. In the **Start Date** field, enter (or select) the scenario's start date.
You can type directly into the field, use the up or down arrow to modify the displayed date, or click the button at the right to display a calendar.

Important

If the WeekStartDay setting has been specified in **Business Units Properties**, your scenario's starting weekday must match this setting. Otherwise, your scenario starts on the first weekday as determined by your operating system's regional settings.

5. In the **End Date** field, enter (or select) the scenario's end date. The maximum time between **Start date** and **End Date** is 42 days (6 weeks).

Important

You must build the scenario in units of one week. For example, if the schedule starts on a Monday, it must end on a Sunday. Schedules must be at least one week, and no more than six weeks, long. WFM Web always obeys schedule period constraints, if you are using a scheduling period for your site, regardless of the number of weeks in the scenario.

6. In the **Extended End Date** field, enter (or select) the scenario's extended end date, if necessary.

Important

Default value: the scenario's end date. This value is useful when you create a schedule scenario for bidding. (Use the **Profiles/Bidding view** to configure bidding.) Edit this value manually to specify an extended end date for the scenario ...to specify that the schedule will apply over a longer period of time (maximum: 6 months).

For example, **Extended End Date** could define an entire quarter—3 months. **Start Date** and **End Date** could define a period of 1 week

that Agents actually use for bidding. When the schedule scenario is published to the **Master Schedule**, the 1-week schedule would be repeated for the entire quarter.

You can also use this value to extend a non-bidding schedule for real agents in the same way: create a 1-6 week schedule that repeats itself over a longer period of time. When you publish this schedule scenario out into the future, you can optionally ask WFM to overlay items from the **Calendar**, such as days off, time off, and exceptions.

7. Optional: Enter text into the **Comments** field.
8. Optional: Select the **Use forecast data from forecast scenario** check box to specify that the schedule will be built based on a forecast scenario, instead of on the **Master Forecast**. If you select this check box, the next wizard screen will be the **Select Forecast Scenario** dialog box.
9. Click **Next** to proceed to the next screen.