



Scenario Based Scheduling

Webinar handout
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Table of Contents

About this Document	2
Overview	2
Scheduling Basics	2
Break Sets	3
Schedule templates	4
Floating Schedule Template	5
Fixed Schedule Template	8
Rotating Schedule Template	11
Common Day Floating Schedule Template	13
Composite Schedule Template	16
Schedule template extras	18
Day off patterns	20
Agent templates	21
How many agents do I need?	22
Schedule and agent template reports	23
Unassigned participant report	23

About this Document

This document accompanies the CommunityWFM College webinar Scenario Based Scheduling. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

Overview

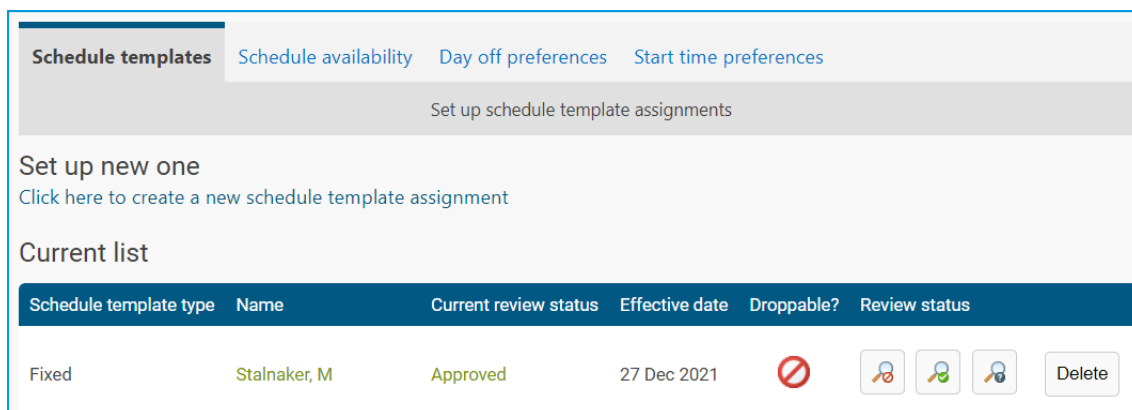
CommunityWFM utilizes schedule templates along with break sets as the fundamental building blocks to scheduling in CommunityWFM. You may assign templates to agents in both a date-based, production-oriented manner, as well as in a non-date-based, ad-hoc, or what-if mode.

Combining different schedule templates allows you to create an almost limitless combination of schedules. We encourage you to contact the support desk to discuss potential new scenarios and we can guide you toward the best approach for your specific needs.






Agent templates allow creating placeholder agents to fit into the schedule for what-if scenarios. They may also be used with agent synch (creating a template then synching agents to that template).

Scheduling Basics

The foundation of an agent schedule is a schedule template. Schedule templates are assigned to agents with an effective date. Working schedules, generated under normal circumstances, will reflect the agent's assigned schedule template for the specified date range.



The screenshot shows a user interface for managing schedule templates. At the top, there are tabs for "Schedule templates", "Schedule availability", "Day off preferences", and "Start time preferences". Below the tabs is a section titled "Set up schedule template assignments" with a sub-section "Set up new one" and a link "Click here to create a new schedule template assignment". Below that is a "Current list" section containing a table with the following data:

Schedule template type	Name	Current review status	Effective date	Droppable?	Review status
Fixed	Stalnaker, M	Approved	27 Dec 2021		   

What this means

- Agents with no schedule template assignment will not receive a schedule.

- Agents with a schedule template effective date later than the date range being scheduled will not receive a schedule.
- Agents with a schedule template assignment in the middle of the schedule week, will get a schedule from the effective date forward.
- Agents can have a current assignment and a future assignment enabling schedulers to “see what the holiday schedule looks like” without impacting the current production schedule.

Schedules templates are not the entire picture but are a fundamental building block in any schedule scenario.

Break Sets

Settings > Schedule templates > Break sets

A break set is a named object that defines any off-phone activity such as a break or lunch that would be scheduled on a recurring basis within a schedule template. A break set can have multiple events such as a break-lunch-break pattern of events.

A schedule template may be defined without a break set, but in most cases if your agents take breaks and lunches, break sets are the correct place to configure those events.

Break set options:

- A break set can be assigned to multiple schedule templates.
- Commonly, a unique break set is created for each schedule template duration. For example: a 4-hour shift may have 1 break whereas a 9-hour shift has 2 breaks and a 60-minute lunch.

Interval name	Duration	Earliest start	Latest start	Event type	Pay status	
Break 1	15	1.50	2.50	Break	<input checked="" type="checkbox"/>	
Lunch	60	3.50	4.50	Lunch	<input type="checkbox"/>	
Break 2	15	6.75	8.00	Break	<input checked="" type="checkbox"/>	

- Earliest start and latest start are configured for each defined event.
- Earliest and latest start may not be the same time.
- Events are optimized within the flexible windows configured for the event.
- Events are optimized on the quarter hour only: :15, :30, :45, :60.

Step 3: Test off-phone interval placement

Test schedule duration

Test schedule start time

Show all possible start times and ranges.

	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM	9:00 PM	10:00 PM	
Sample Work Interval				[Blue bar]														
Break 1					[Cyan bar]													
Lunch							[Orange bar]											
Break 2											[Cyan bar]							

Schedule templates

CommunityWFM **Enterprise** features five schedule template types that can be combined to create almost any schedule scenario. CommunityWFM **Essentials** includes three schedule template types.

It is important to understand the capabilities of each template type. Different scheduling approaches may require different template types. You may be able to accomplish the same thing with two different template types, but it may be easier using one type versus another.

The five schedule template types are:

1. Floating
2. Fixed
3. Rotating
4. Common Day Floating
5. Composite

Essentials include three templates.

New schedule template

Click the "Select..." button next to the type of schedule template you want to create.

Select schedule type	Schedule type
<input type="button" value="Select..."/>	Floating A schedule that has floating start times, and optional workday settings.
<input type="button" value="Select..."/>	Fixed A schedule that has fixed start and end times.
<input type="button" value="Select..."/>	Rotating A schedule that rotates through a set of predefined schedules in ordered steps.
<input type="button" value="Select..."/>	Common Day Floating A schedule that has common work patterns, but allows the optimization engine to pick appropriate day groups. Also guarantees uniform schedule start and break times for all days scheduled for a week.
<input type="button" value="Select..."/>	Composite Schedule A schedule that is composed of member schedule templates, of which all are assigned to the agent when optimizing. Used primarily for variable work habits or to accommodate availability constraints.

Each schedule template includes slightly different set up options.

These instructions assume you have created break sets for all shift durations.

Create a new schedule template	
The initial step is the same for all schedule template types.	
Create a new template.	1. Settings>Schedule Templates>Schedule Templates.
	2. Select <i>Click here to create a new schedule template</i> .
	3. Click <i>Select</i> next to schedule template type you wish to create.

Floating Schedule Template

A Floating Schedule Template has floating start times and optional workday settings.

- A defined duration applies to all scheduled days.
- The days off are assigned by the scheduler at the time assigning the schedule template to the agent.
- The schedule optimization engine assigns the scheduled agent at the optimal start time on each scheduled day, which means the agent can have a different scheduled start time each scheduled day.
- The window of available assigned start times can be restricted with a window of potential start times.
- Floating split shifts can be setup within the floating schedule template by setting up multiple fixed start and end time windows that do not overlap within the same template.
- Agents can have a different schedule each week, based upon the requirements and the schedules assigned to other agents.
- The floating schedule template is commonly used in an environment that requires great flexibility from agents.
- Fixed off-phone events such as breaks and lunches are defined by associating a constrained break template.

Floating schedule template

(Enterprise version only). The shift start and end times are determined by CommunityWFM. You define the number of hours to include in a shift and the system determines the best start and end times to meet service level based on projected call volume, AHT, and shrinkage. The starting time for each shift "floats." You determine the day off patterns.

Step-by-step


Create the basic properties.

Step 1: Basic properties

1. Give it a representative name. When naming schedule templates, remember that CommunityWFM sorts them first by template type, then alpha/numerically.
2. You can leave *Description* blank but add one if someone who is unfamiliar with the template will need to use it.
3. Enter the number of days each week an agent should receive a schedule (e.g., full-time 40 hr./week, 8-hour shift enter 5).
4. Click *Save* then click *Next*.

The work time screen always starts on Monday, but this won't affect the schedules.

Step 2: Work times

5. Enter the duration of the shift in hours (e.g., 8.5 for 8-hour shift with 30-minute lunch).
6. **Break set assignment:** Select the break set from the drop-down menu.
7. **Work type:** Select the assigned work type from the drop-down menu.
8. **Click the Save icon** (). After clicking the save icon, you'll be able to edit the start times.
9. Click *Edit start times* to open the pop-up window.
10. Select the earliest possible start time from the drop-down menu. E.g., if your center opens at 9:00 am and agents arrive and log in at 8:30 am, select 8:30 am.
11. Select the latest possible start time from the drop-down menu. E.g., if the last shift ends at 8:00 pm, select 11:30 am.
12. Click the *Save* icon.

	<p>13. To copy the template to other days of the week: Select the days of the week then click <i>Copy</i>.</p>
	<p>Step 3: Day Patterns</p> <p>14. Enter a day pattern name, e.g., Mon-Fri or Tues-Sat.</p> <p>15. Check the workdays of the week that apply to that pattern.</p> <p>16. Click the <i>Save</i> icon.</p> <p>17. Add additional day patterns.</p> <p>18. Click <i>Finish</i>.</p> <p>Note: If you get an error message that you can't add a day pattern, check to make sure that there are <i>Work times</i> assigned to the days you wish to add.</p>

Example 1 floating schedule:

Cindy Op is assigned to work Monday through Friday for a duration of 8.5 hours with a 30-minute lunch and can start any time between 6:00am and 11:00am.

CommunityWFM will schedule Cindy Op Monday through Friday with an optimized start time based upon maximizing agent requirement coverage.

Example 2 floating schedule:

Jill Op is a student and needs a non-normal schedule: a floating split schedule. Jill Op is not available any day between the hours of 1:00pm and 4:00pm but can work any time outside the 1:00pm to 4:00pm window.

Jill Op's template is set up with a start time of the first shift within the template with all possible start times that would not have an end time after 1:00pm. The second shift would be set up with any start time 4:00pm and after.

Fixed Schedule Template

A Fixed Schedule Template has fixed start and end times.

- The start and end times of the schedule are not optimized.
- The start and end times can be different on different scheduled days.
- The duration of the schedule can be different on different scheduled days.
- Fixed split shifts can be setup within the fixed schedule template by setting up multiple fixed start and end times within the same template.
- Breaks can be different each day.
- Can have off-phone events such as breaks and lunch fixed to specific times.
-

Fixed schedule template	
<p>The shift start times and end times and days off do not change week to week, and are not determined by CommunityWFM. Each day can have a different schedule, but the variation does not change week to week. Breaks and lunches can be a fixed time or optimized by CommunityWFM.</p>	
Step-by-step	
<p>Create the basic properties.</p>	<p>Step 1: Basic properties</p> <ol style="list-style-type: none"> 1. Give it a representative name. When naming schedule templates, remember that CommunityWFM sorts them first by type, then alpha/numerically. 2. You can leave <i>Description</i> blank but add one if someone who is unfamiliar with the template will need to use it. Don't do anything with <i>Default interval options</i>. 3. Select the <i>Default interval options</i> to indicate the hours during which schedules may be applied. Default is <i>Create a 24-hour schedule</i>. Select <i>Specify schedule boundaries</i> to enter start and end times. 4. Click <i>Save</i>.

<p>The work time screen always starts on Monday, but this won't affect the schedules.</p>	<p>Step 2: Work times</p> <ol style="list-style-type: none"> 5. Click <i>Next</i> to set up the work times. 6. Select the start time. 7. Select the end time. 8. Select the break set in the break set assignment window. 9. Select the time from the drop-down then click <i>Save</i>. <p>After saving, you'll have the option to "fix" the break times. If you have a break time that needs to be consistent:</p> <ol style="list-style-type: none"> a. Click the thumbtack next to the break set assignment window and in the pop-up window, click the thumbtack next to the break or lunch you need to set. b. Assign time(s) to the breaks. c. Click the <i>Save</i> icon. d. Close the pop-up window. <ol style="list-style-type: none"> 10. Select the default work type. 11. Click the <i>Save</i> icon and CommunityWFM will build that shift. <p>To copy the template to other days of the week: Select the days of the week then click <i>Copy</i>.</p>
<p>Because this is a fixed schedule, there are no day off patterns. The workdays are set within the schedule template.</p>	

Example 1 fixed schedule:

Jo Operator works the same schedule each day of the week.

8:00am–5:00pm Monday thru Friday with a 60-minute lunch each day

Example 2 fixed schedule:

Sally Op works a different schedule on different days of the week for a total of 40 paid hours.

8:00am–6:30pm Monday with a 30-minute lunch, a total of 10 paid hours, then works a different schedule the rest of the weekdays.

8:00am–4:00pm Tuesday through Friday with a 30-minute lunch, a total of 7.5 paid hours each of the four scheduled days.

Example 3 fixed schedule:

Jim Op is a student and needs a non-normal schedule; a fixed split schedule Monday through Wednesday and then different shifts each on Thursday and Friday.

Monday, Tuesday, Wednesday 8:00am-1:00pm and then 5:00pm-8:00pm.

(This would be similar to giving a 4.0-hour lunch break, but it is easier to define two start and end times.)

Thursday 8:00am-4:30pm with a 30-minute lunch

Friday 12:00pm-8:30pm with a 30-minute lunch

Fixed template example

Step 2: Work times

Monday Tuesday Wednesday Thursday **Friday** Saturday Sunday

Fixed Schedule Intervals

Start Time	End Time	Duration (hours)	Break set assignment	Fixed break	Work type
Friday, 12:00:00 PM	Friday, 08:30:00 PM	8.50	08.5 Hour Shift (30 min lunch)	✖	Work
Friday, 08:00:00 AM	Friday, 08:00:00 AM		-- No Selection --		-- No Selection --

Sample fixed schedule

	4:00 AM	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM	9:00 PM	10:00 PM	11:00 PM
Monday					■	■	■	■	■											
Tuesday					■	■	■	■	■											
Wednesday					■	■	■	■	■											
Thursday					■	■	■	■	■	■	■	■	■							
Friday										■	■	■	■	■	■	■	■			
Saturday																				
Sunday																				

Copy to other days

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Schedule summary

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Scheduled hours	5.00	5.00	5.00	8.50	8.50	0.00	0.00	32.00
Paid hours	5.00	5.00	5.00	8.00	8.00	0.00	0.00	31.00
Unpaid hours	0.00	0.00	0.00	0.50	0.50	0.00	0.00	1.00

Rotating Schedule Template

A Rotating Schedule Template rotates through a set of predefined fixed, floating, common day floating, and / or composite schedules in ordered weekly steps.

- Covers multiple weeks.
- Comprises multiple schedule templates.
- Agent works one template one week and then another template the next.
- Any number of weeks can be set up.
- A single schedule template can be defined to occur multiple weeks prior to progressing to the next schedule template.
- Commonly used when agents work non-weekend covering schedules one week and then work a schedule that has some weekend hours the next week.
- Commonly used to have agents work fixed schedules for a week and then be optimized the next week's schedule.
- Commonly used to provide optimized flexing schedules while still providing agent schedule consistency for most of the scheduled weeks.

Rotating schedule template	
Allows you to set an order in which a combination of schedule templates will automatically rotate. For example, this is commonly used when agents rotate weekends.	
Step-by-step	
<p>Create the basic properties.</p> <p>This is not the number of steps.</p>	<p>Step 1: Basic properties</p> <ol style="list-style-type: none"> 1. Give it a representative name. When naming schedule templates, remember that CommunityWFM sorts them first by type, then alpha/numerically. 2. You can leave <i>Description</i> blank but add one if someone who is unfamiliar with the template will need to use it. Don't do anything with <i>Default interval options</i>. 3. Select the effective date from the date picker. This is the first day that this schedule template will be active. 4. Enter the <i>Step length in weeks</i>. This is how many times you will repeat each step in the rotation, not how many steps

	<p>there are. If you have four weeks of templates in a rotating schedule template (3 of M-F then one with a weekend) and leave this number as one, you will go through each step one time. If you change this number to two, each step in the rotation would occur twice before moving to the next one (i.e., 6 weeks of no weekend shift then two weekends in a row).</p> <p>5. Click <i>Save</i>.</p>
<p>This will tell Community how many times to use this schedule template before moving to the next one.</p>	<p>Step 2: Rotation steps</p> <p>6. Click <i>New step</i> to launch a pop-up window.</p> <p>7. Select a schedule type from the drop-down menu. Then select a template.</p> <p>8. Select <i>additional assignment parameters</i> from the drop-down menu.</p> <p>9. Enter the <i>Number of copies of this step to create</i>.</p> <p>10. Click <i>Save</i>.</p> <p>11. Repeat to add additional rotation steps.</p> <p>12. After adding all steps, click <i>Finish</i>.</p>
<p>Assigning rotating schedule templates to agents.</p>	<p>NOTE: If the effective date of the schedule template is different from the effective assignment date to the agent, the 'step' in a schedule may be different from what you expect.</p> <p>When assigning a rotating schedule template to an agent, assign it to start the same week as the effective date of the template, then assign the week (the step) you expect them to be on that week. This will ensure that the steps line up as expected.</p> <hr/> <p>To view schedule assignments, in a working schedule expand the Utility Schedule Reports section and open the <i>Effective schedule assignments</i> report. The Assignment Notes column shows the current schedule for the week and the initial step assignment for each agent (not the current step).</p>

Example 1 rotating schedule template:

Alex Op works a fixed 8.5-hour with 30-minute lunch 8:00am– 4:30pm Monday through Friday schedule for two straight weeks and then works a common day floating schedule that will

optimize an off day between Monday and Saturday and assign an optimized start time that will start any time between 7:00am and 9:00am.

In this example, if all agents are assigned this schedule the center would have Saturday coverage and optimize one-third of the staff each week. Each week will optimize a different one-third of the staff.

Common Day Floating Schedule Template

Common Day Floating Schedule Template is optimization to pick workdays / off days and establishes uniform schedule start times, end times, and off-phone start times for all optimized scheduled days for a week.

- Days off / days scheduled determined by requirements, agent assigned skills, agent availability, and agent preferences. The available template scheduled workday patterns are defined by the schedule at the time the schedule template is designed. The scheduled days assigned will only be within the defined patterns. So, if Monday off is not defined as an option within any of the patterns, then the agent will not be scheduled with a Monday off.
- Same start times for each scheduled day.
- Window of available assigned start times can be restricted with a window of potential start times.
- Same schedule duration for each scheduled day.
- Agents can have a different schedule each week, based upon the center requirements and the schedules assigned to other agents.
- Floating split shifts can be setup within the floating schedule template by setting up multiple fixed start and end times windows that do not overlap within the same template.
- Fixed off-phone events such as breaks and lunches are defined by associating a constrained break template.
- The common day floating schedule template is commonly used in an environment that requires some agent schedule flexibility, but the operation wants to provide the agents consistency of start time.

The two differences between a floating schedule and a common day floating are that a common day floating schedule will have consistent start time for all scheduled days and will also use a scheduled day pattern from within the list, while a floating schedule may have different start times each day and the days off are user selected from the scheduled day list.

Common day floating schedule template	
<p>The shift start and end times are determined by CommunityWFM and will be the same for all scheduled days in each week. You define the number of hours included in a shift. CommunityWFM determines the days off based on the day off pattern of the template and the forecasted staffing requirements.</p>	
Step-by-step	
Create the basic properties.	<p>Step 1: Basic properties</p> <ol style="list-style-type: none"> 1. Give it a representative name. When naming schedule templates, remember that CommunityWFM sorts them first by type, then alpha/numerically. 2. You can leave <i>Description</i> blank but add one if someone who is unfamiliar with the template will need to use it. Don't do anything with <i>Default interval options</i>. 3. Enter the number of days each agent should receive a schedule. 4. Enter the duration of each shift in hours (including unpaid lunch). 5. Use <i>common-day behavior for off-phone periods</i> allows you to select whether to fix breaks and lunches at the same time for each shift. 6. Select the Work type from the drop-down menu. 7. Click <i>Save</i>. 8. Click <i>Next</i> to set up the start times.
	<p>Step 2: Start time options</p> <ol style="list-style-type: none"> 9. Select the earliest possible start time from the drop-down menu. E.g., if your center opens at 9:00 am and agents arrive and log in at 8:30 am, select 8:30 am. 10. Select the latest possible start time from the drop-down menu. E.g., if the last shift ends at 8:00 pm, select 11:30 am.

	<ol style="list-style-type: none"> 11. Click the Save icon. 12. Click <i>Next</i>.
	<p>Step 3: Day Patterns</p> <ol style="list-style-type: none"> 13. Enter a day pattern name, e.g., Mon-Fri or Tues-Sat. 14. Check the workdays of the week that apply to that pattern. 15. Click the <i>Save</i> icon. 16. Add additional day patterns. 17. Click <i>Finish</i>.

Example 1 common day floating schedule:

Billy Op is available to work any day with a start time between 6:00am–11:00am and will work an 8.5-hour shift with a 30-minute lunch. The requirements are greatest on Monday and if everyone is scheduled, the queues are properly staffed, thus no patterns are defined with Monday as an off-day option.

Based upon Billy Op’s skills, the requirements of those skills, the skills of other agents and the requirements of all skills, Billy will be assigned a work schedule that will have optimized days off and a consistent start time for all scheduled days within the scheduled week that is also optimized.

Example 2 common day floating schedule:

Samantha Op is a student and needs a non-normal schedule; a common day floating split schedule. Samantha Op is not available any day between the hours of 1:00pm and 4:00pm but can work any time outside the 1:00pm to 4:00pm window.

Samantha Op’s template is setup with a start time of the first shift within the template with all possible start times that would not have an end time after 1:00pm. The second shift would be set up with any start time 4:00pm and after.

Samantha Op’s assigned schedule will have the same start and end times for each day during the scheduled week based upon optimized coverage.

Composite Schedule Template

A Composite Schedule Template is composed of multiple fixed, floating, and / or common day floating schedule templates, which are all assigned to the agent. These are used primarily for variable work habits or to accommodate availability constraints.

- A combination of more two or more fixed, floating, and common day schedule templates.
- Commonly used in an environment that requires agents to be scheduled with different schedule start times or durations due to flexing hours of operation for some or all activities.

Composite schedule template	
(Enterprise only) Includes a combination of two or more of the other schedule templates.	
Step-by-step	
Create the basic properties.	Step 1: Basic properties <ol style="list-style-type: none"> 1. Give it a representative name. When naming schedule templates, remember that CommunityWFM sorts them first by type, then alpha/numerically. 2. You can leave <i>Description</i> blank but add one if someone who is unfamiliar with the template will need to use it.
Assign a selected schedule.	Step 2: Member schedule templates <p>'Member schedule template' refers to the individual templates that are members of this composite template, not the people.</p> <ol style="list-style-type: none"> 3. Click <i>New member</i> to add a new predefined schedule. 4. Select a schedule type from the drop-down menu. 5. Click <i>Save</i>. 6. Add any additional member templates to the composite. Click <i>Save</i>. <p>When finished, click <i>Finish</i>.</p>

Example 1 composite schedule template:

Jackie Op works in a contact center that is open 7:00am–5:30pm Monday thru Friday and 9:00am–3:00pm on Saturday and closed Sunday.

Jackie Op is going to work a fixed 10.5-hour Monday schedule of 7:00– 5:30 with a 30-minute lunch on Monday because the high Monday volume requires her to be scheduled a shift covering the majority of the peak times of the day.

Tuesday through Friday she will be scheduled three of the days with an 8.5-hour schedule with a 30-minute lunch that will be optimized with a common day floating schedule with start times anywhere from 7:00 to 9:30am.

The remaining time will be assigned to Jackie to work Saturday during the hours of 9:00am– 3:00pm by assigning a 6.0-hour fixed schedule.

Copy a schedule template	
<p>If you need to create a new template with many of the same properties as an existing template, simply copy the existing template then edit it!</p>	
<p>Copy an existing schedule template.</p>	<ol style="list-style-type: none"> 1. Navigate to Settings > Schedule templates > Schedule templates. 2. Click <i>Copy</i> next to the schedule template you wish to duplicate. 3. Enter a <i>New template</i> name (default is <i>Copy of...</i>). 4. Click <i>Save copy</i>. 5. Select the new template name to open and edit it following the Steps-to-Success. 6. Review the schedule template. If necessary, create a new break set to accommodate the new schedule template. <ol style="list-style-type: none"> a. To create a new break set, navigate to Settings > Schedule templates > Break sets > <i>Click here to create a new break set</i>.

Schedule template extras

Within each schedule template steps-to-success are three **Schedule Template Extras**:

- Assigned people
- References
- Security

Assigned people is where you can add or remove a person or groups of people to/from the schedule template. You can also assign a schedule template within an agent's profile.

References shows any other schedule templates that use the current template. For example, rotating schedule templates and composite schedule templates are linked to existing schedule templates. **Note:** If the template is used as a reference by another template, you cannot delete it.

Security allows you to apply security settings to this schedule template.

Assigning schedule templates	
To receive a schedule, an agent must have an assigned schedule template effective the date of or prior to the schedule start date.	
Assign template to one agent.	<ol style="list-style-type: none"> 1. Navigate to the agent's profile: Settings > People & agent templates > People 2. Select the person from the list. 3. Click <i>Set up scheduling parameters</i> in the Scheduling tile. 4. Select <i>Click here to create a new schedule template assignment</i>. 5. In the schedule type down-down menu, select the schedule template type. 6. In the schedule template drop-down menu, select the specific template to assign. 7. If applicable to the selected template, select the <i>Additional assignment parameters</i>. 8. Select the <i>Effective date</i> for the assignment. The date must be on or before the first day of a schedule.

	<p>9. Check the box if <i>This schedule assignment may be dropped if volume does not require this agent.</i></p> <p>10. Click <i>Save.</i></p> <p>The template will now appear in the list of assigned templates for the agent.</p>
<p>Assign template to a group of agents.</p>	<ol style="list-style-type: none"> 1. Navigate to Settings > Schedule templates > Schedule templates. 2. Click on the Template name. 3. In the Schedule Template Extras section, click <i>Add or remove people.</i> 4. Click <i>New assignments.</i> 5. The schedule type is preselected. 6. Select <i>Additional assignment parameters</i> if applicable for this template. 7. Select the group type in the drop-down menu. On the next page you will select the specific people. <ol style="list-style-type: none"> a. Enterprise model: Click on an activity to display a list of agents in that activity. b. Supervisor: Click on a supervisor name to display a list of all agents for that supervisor. 8. Select the <i>Effective date.</i> Default is current date. 9. Click <i>Next.</i> 10. For each person, check the box to assign the template and check the box if the schedule is droppable. To assign to everyone, click <i>Select all</i> at the bottom of the page. <i>Droppable</i> must be checked separately for each agent. 11. After making your selections, click <i>Assign.</i> 12. When complete click <i>Finish.</i>

Day off patterns

This table includes all possible day off patterns, assuming five workdays per week in a center open seven days per week.

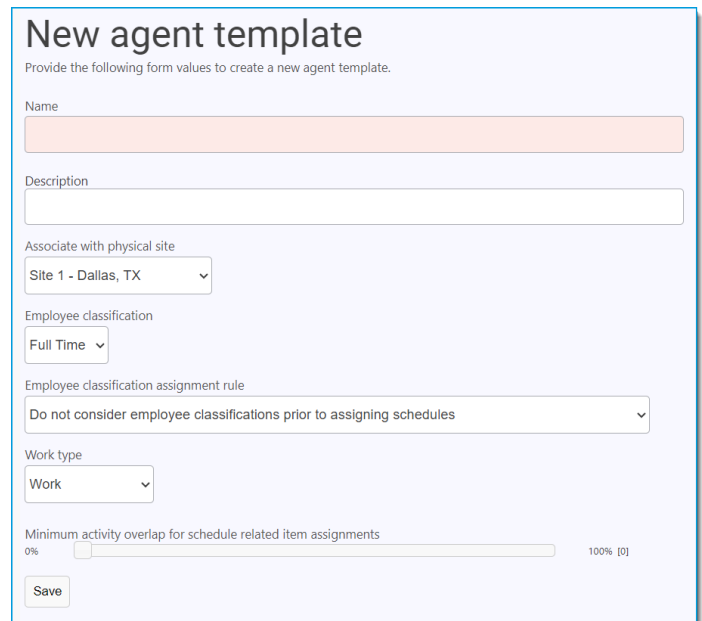
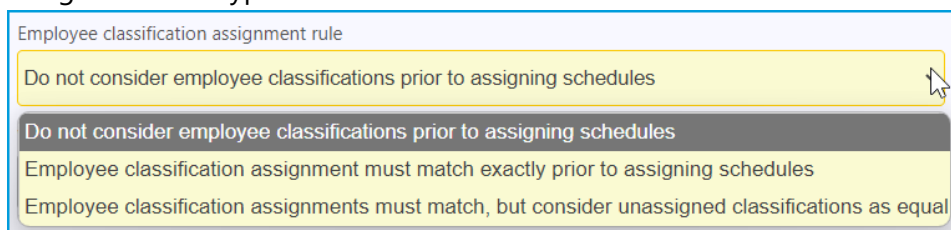
Days Off	Days Worked		
SA-SU	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
MO-SU	<input type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
TU-SU	<input checked="" type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
WE-SU	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
TH-SU	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
FR-SU	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input type="checkbox"/> Sunday		
MO-SA	<input type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
TU-SA	<input checked="" type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
WE-SA	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
TH-SA	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
FR-SA	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
MO-FR	<input type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
TU-FR	<input checked="" type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
WE-FR	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
TH-FR	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
MO-TH	<input type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
TU-TH	<input checked="" type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
WE-TH	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
MO-WE	<input type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
TU-WE	<input checked="" type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
MO-TU	<input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Saturday <input checked="" type="checkbox"/> Sunday		
	<input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday		

Agent templates

Settings > People & agent templates > Agent templates

An agent template is just a placeholder agent—a blank agent. This may be helpful when you know you will have new agents, but don't know who they are yet (e.g., new hires), or when doing 'what-if' scenarios.

1. Select *Click here to create a new agent template*.
2. Name the template (required) and add a description (optional).
3. The site is your call center, or if you have multiple sites pick the site for the scenario.
4. Employee Classification: Select if applicable.
5. Employee classification assignment rule: Select whether employee classification must match prior to assigning schedules.
6. Change the work type to *Work*.

7. Minimum activity overlap for schedule related item assignments: This determines the degree of skill matching required when creating the schedule. If 0%, any schedule may be assigned. If 100%, only schedules that match all activities for the agent template may be assigned.
8. Click Save.

Now we need to assign the skills that the new hire is going to take.

9. Click on the blue *Activities* icon and select the skills.
10. Click *Save*.

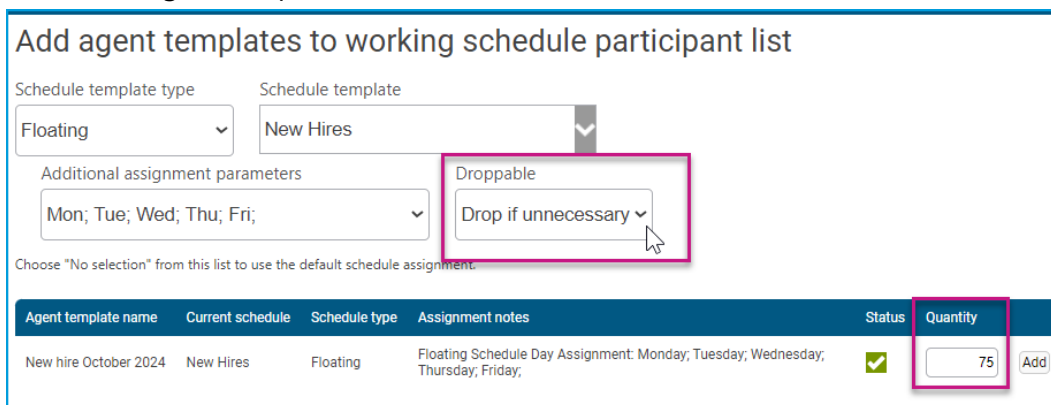
The template includes several of the same tiles as a real agent. It does not include Adherence, Time off settings, Restricted action plans, employment transitions, or the agent 'Extras.' It has 'Extras' tiles for copying the template, agent synchronization, and security.



The template is now ready to use in what-if scenarios and planning.

How many agents do I need?

One way to determine how many agents you need for a given schedule is to add a large number of copies of an agent template to a working schedule and make them droppable ("Drop if unnecessary"). The resulting optimized schedule using this agent template will include the number of agents required to meet the forecast needs.



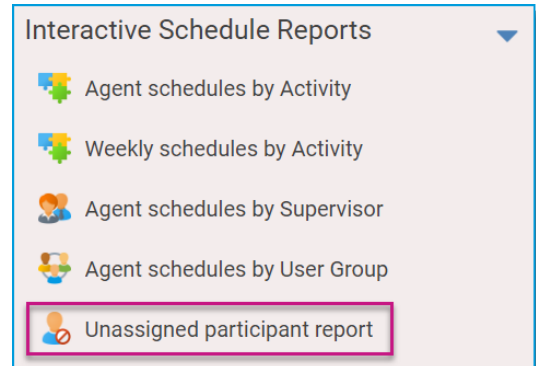
Agent template name	Current schedule	Schedule type	Assignment notes	Status	Quantity
New hire October 2024	New Hires	Floating	Floating Schedule Day Assignment: Monday, Tuesday, Wednesday, Thursday, Friday,	✓	75

Schedule and agent template reports

Unassigned participant report

When ready to assign agents without assignments to schedules, you can do that in this report. Or if there's an exclamation point for *Agent Schedule Template Assignment* when generating an optimized schedule, run this report to view who does not have an assigned template.

To access the report: In a working schedule, expand the Interactive Schedule Reports section and select the report.



In the report, agents without assigned schedules are shown on the bottom, with available schedules at the top. To assign an agent to the schedule, simply drag and drop the agent tile onto the schedule.

