Managing Published Schedule Events with Ease

Webinar handout
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Contents

About this document

This document accompanies the CommunityWFM College webinar *Managing Published Schedule Events with Ease*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

Automated Schedule Attendance Monitor (ASAM)

Most contact centers have a defined process for reporting unplanned time off ("call-outs") and being late. ASAM, integrated with the ACD and the agent mobile app, provides an automated and streamlined approach to tracking agent arrival and attendance.

The Attendance Monitor in ASAM allows supervisors to view agents by specific time intervals as they arrive, and the Arrival Detail Console streamlines the process of managing exceptions such as designating an agent as absent.

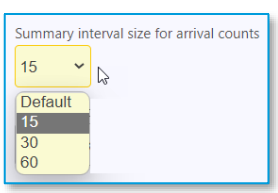
Adding the ASAM

Add the ASAM to your homepage (Today).

1. Go your name > Personalize.
2. In the middle tab – Choose your content – Select *Edit Contents*.
3. Click the green plus next to Automated Schedule Attendance Monitor.
4. Return to your Today page and refresh.

Setting up the ASAM

1. To configure the ASAM, click the pencil icon on the right of the toolbar. If you don't see the pencil icon, contact your WFM administrator.
2. Set your preferences for the ASAM, then click *Save settings*.



We recommend setting the *Summary interval size for arrival counts* to match the schedules for your center. If this is set to 60 and agents arrive at 15-minute intervals, you won't be able to see agents who arrive at :15, :30, or :45.

3. Return to your Today page and refresh to view the new settings.

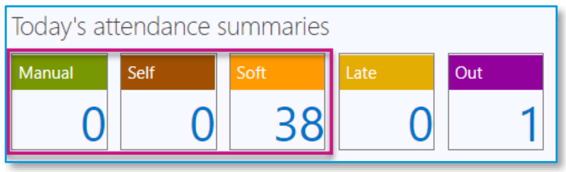
Using the ASAM

Reviewing the attendance summary

Today's attendance summaries.

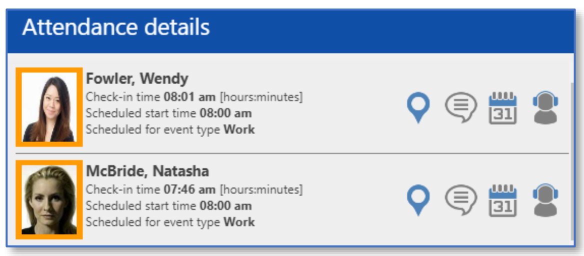
The summary lists the total number of agents in each category.

To view the names of agents who have checked in, click the Manual, Self, or Soft tiles in Today's Attendance Summaries.



Soft = people who have logged in to their ACD.

Click on a tile in Today's attendance summaries to view Attendance Details—a list of agents in the category.



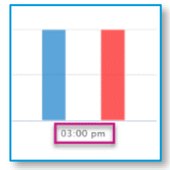
Options for interacting with the agent include:

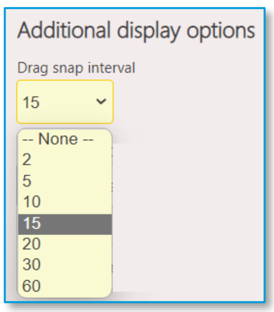

Check in (Not recommended)**:** Click to manually check-in the agent.

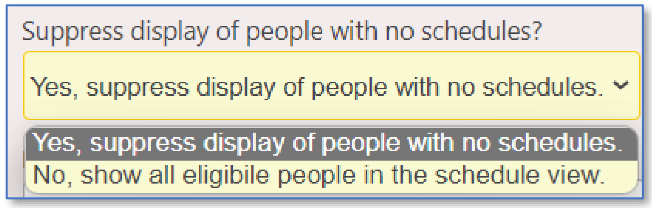

Messaging: Click to launch the *Send a message* pop-up. You can select any or all active notification channels.

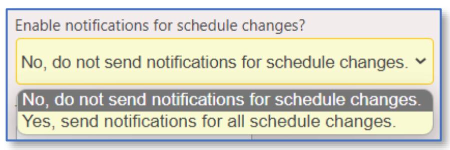

View schedule: Click the calendar icon to view the weekly schedule for the agent.


View profile: Open the agent's profile.

Reporting absent agents	
	To view and manage agents who have not arrived, click the arrival time in the base of the bar graph. 
Marking an agent as absent.	To mark someone as absent for a shift: **1.** Click on the time of arrival in the bar graph to open the list of agents scheduled to arrive at that time. Once an agent arrives or is marked as absent, they will disappear from this list. **2.** Click and drag the agent card to the tile *Mark people as Out*. **3.** Add a short description of the absence. **4.** Select the *Event type* to place on the agent's schedule. **5.** Click *OK*. We do not recommend manually checking in or marking people as late in the ASAM unless they are employees who do not log in to an ACD. Allow the system to register agent tardiness/check-in to keep your records accurate.
Editing schedules	
Where to edit published schedules.	You can edit published schedules in multiple places. Two common places are: Report > Published schedule > Schedule details > Enterprise model to see the schedule for the week. Report > Schedule adherence > Daily schedule adherence > Enterprise model. The daily schedule adherence report includes additional information, however, it can take a bit longer to load and register edits. Weekly Schedule module on the home page is also an option but does not show the effect on the schedule service metric.

Setting report menu options	
Show options in a report.	The Report Filter & Options menu is on the right side of the screen when you open a published schedule report or schedule adherence report. If you don't see the menu, click *Show options*. **Note:** This document does not review all possible settings in the options menu.
Sorting filters	
Display sort options.	You can filter the schedule report display to sort by— • Start Time (default) • Name • Employee ID • Hire date • Tiebreak value • Out of adherence percent (in the Adherence report) • Any other custom fields
Drag snap interval	
Change interval for drag/snap of events.	By default, the interval for dragging and snapping events is set to the interval in the *Global settings & preferences*, typically 15-minutes. You can change the interval to a different setting for this report instance. It will revert to the default the next time you open the report. 
Showing/hiding agents without schedules	
Display agents without schedules.	You may choose to show or hide agents who do not have schedules during the report period.

<table>
<tr><td></td><td>

Show agents without schedules (No, show all eligible people) if you wish to add additional people to the schedule or need to view who did not receive a schedule.
Hide (Yes, suppress display of) agents without schedules if you will be editing only existing schedules.
</td></tr>
<tr><th colspan="2">Notifying agents of schedule changes</th></tr>
<tr><td>Change notifications</td><td>By default, agents are not notified of edits made to their schedule in a published schedule or adherence report. You can change this in the Enable notifications for schedule changes? drop-down menu.


After selecting Apply options, notifications will be sent when any change is made to an agent's schedule.

This setting will apply while the report is open and will reset to the default of not notifying agents after closing the report.</td></tr>
<tr><th colspan="2">Adjusting events on a schedule</th></tr>
<tr><td colspan="2">If you adjust events on the schedule report by any method, the changes will display immediately and the inline statistics in the chart at the top will adjust to the new settings.

If you adjust events in a pop-up window (e.g., after right click | edit / delete / create / convert), the changes do not show until you refresh the page or click the PC (pending changes) button, though someone else accessing the report will see the change.
</td></tr>
</table>

Moving a schedule	
Move the schedule start/end time.	Click and drag in the middle of a schedule to move it to a new start and end time without changing the duration. When releasing the click, the breaks and lunch will move with the schedule and pop into place at the same relative time.
Extending or shortening a schedule	
Extend or shorten duration.	If an agent will work late or leave early, click and drag on the edge of the schedule to extend or shorten the duration. The pop-up tooltip text will show the new end time and shift duration as you drag. Release the click to apply the change. **Note:** Consider making this change as a new event (e.g., voluntary time off [VTO] to leave early or overtime [OT] to work late. This will allow tracking of the time in reports.
Moving the time of an event	
Move the event time.	Click in the middle of an event (e.g., break or lunch) then drag to the left or right to move it to a new time, keeping the same duration. The pop-up tooltip displays the new time as you move the event. Once it is in the correct place, release the click and the event will move.
Adjusting event duration in 15-minute increments	
Adjust duration by 15-minutes.	Click on the edge of an event and drag to extend or shorten the event. The pop-up tooltip displays the new start and end time and new duration. Release the click to apply the change. This method adjusts the time in 15-minute increments (or the setting in your *Global Settings and Preferences* or selected in the options panel).

Adjusting time or duration to the minute

Adjust time or duration to the minute.	To change the time or duration of an event to an exact minute, right click on the event and select *Edit the event.* In the menu, select *Use a custom start and end time* then select the exact time from the drop-down menu. When finished, click *Save.* **Note:** As with all changes made in pop-up windows, this change does not display upon saving. The PC button will display a red number. Click PC or refresh the page to display the changes. 

Displaying layered schedule view

Layered schedule view.	This view displays each event on its own line in a pop-up window. With this view you can see events that might be hidden by overlapping events. **1.** Right click on a schedule. **2.** Select *Show layered schedule view.* You can edit events in this view the same way as in a report. Because this is a live view, edits show immediately.

Adding a schedule

Adding a new schedule for an agent (or agents) without a schedule.	**1.** In the report options fly-out menu, change the option for *Suppress display of people with no schedules?* to *No, show all eligible people in the schedule view.* **2.** Click *Apply options.* The people without schedules will be at the top of the list (if the display filter is *Start time*). **3.** Right click on an agent's name and select *Create new work intervals.* **4.** In the pop-up window, complete the steps to success. **Step 1** Specify event properties:

	a. Select the *Event type*. b. Select the start and end time. c. Add a *Description that matches the work event*. d. Click *Next*. **Step 2** Add off-phone intervals e. Click *Add new* to add a new break or lunch. i. Select break or lunch. ii. Select the *Start time* iii. Enter the *Duration* iv. Add a *Description* f. Click *OK*. g. Repeat to add any additional breaks or lunch. h. Click *Next*. **Step 3** Specify additional days i. Click on any additional days that will apply for this new schedule. j. Click *Next*. **Step 4** Choose other participants. k. Click on the picture of any additional people who will work the same schedule. You may also click *All* to select everyone. l. Click *Next*. **5.** Confirm and finish. m. Review your schedule then click *Confirm* to apply. n. Review the event assignment results. There will be a row for each event (work, break, lunch, etc.), for each person, for each assigned day. o. Click *Finish*. Refresh the report to view the new schedules. **Note:** If filtering by start time, the agents will no longer show at the top of the list as they now have a schedule.

Deleting a schedule	
Delete an existing schedule.	**1.** In the report, right click on the schedule. **2.** Select *Delete this event.* **3.** In the pop-up window, review the details then click *Delete event.* This will delete the schedule and all associated events.

Creating time off events	
Create new events on one or more schedules.	There are several options for creating/editing time off when you right click on a schedule. ***Create a new intraday event:*** Allows creating a new event for one or many days. ***Create a new planned time off event:*** Convert a whole shift or partial shift for one or many days to a new PTO event type. ***Convert work event to time off:*** Convert all or part of today's schedule to a new event.
Create a new intraday event	
Schedule an event such as a meeting* for one or more agents. *Another option for scheduling a meeting is the ASAP.	**1.** Right click on the schedule and select *Create a new intraday event.* **Step 1** Specify event properties **2.** Select the *Request type* from the drop-down menu. **3.** Select the *Start date* and *End date*. The default is today's date. **4.** Select the *Start time* and *End time* for the new event. **Note:** If creating a partial day event (e.g., someone going home early), be sure the *Start time* is the time the person is leaving early, and the *End time* is the end of the shift. **5.** *How should this event influence existing work hours?* Indicate whether the new event should modify any existing events on the schedule (the default is *Do not*

	modify any existing events on the schedule). Typically leave this option as the default. **6.** *What recurrence pattern should apply to this event?* If this event will occur on more than one day, you can set up a recurrence pattern here. **7.** Add a required *Comment*. **8.** If this event will apply only to this person, click *Save* then *OK* to confirm. **9.** To add additional people to the same event, click *Next*. **Step 2** Select how to include other participants. a. Select the *Activity* with the people to add. b. If you assign multiple people, how do you want the events schedule? *i.* Treat each person's event as an individual assignment: With this option you can remove one person without affecting the others. However, if you need to make a change such as the start time, you must make the change on each person's schedule. *ii.* Treat the event as a single event assigned to all participants: Any change to the event will apply to all participants (changing the start time, deleting, etc.) c. Click *Next*. **Step 3** Choose participants d. Click *Approved* for each person you wish to add to your meeting. e. Click *Next* then click *OK* to confirm your selections. f. Review your selections. g. Click *Finish*. Click the *PC* button or refresh the page to view the schedule change.

Create a new planned time off event	
Changing a scheduled event to (or creating a new) time off event.	**1.** Right click on the schedule and select *Create a new planned time off event.* **Step 1** Specify event properties **2.** Indicate *All day* or *Partial day*. **3.** Select the event type for the time off request. **4.** The day will default to the date of the schedule, but you can change it here or add additional days. **5.** If a partial day, select the *Start time* and *End time* of the event. **Note:** If creating a partial day event (e.g., someone going home early), be sure the *Start time* is the time the person is leaving early, and the *End time* is the end of the shift. **6.** Add a *Comment* (required). **7.** Click *Next.* **Step 2** Select how to include other participants (not available here for all options). **8.** Click *Next.* **Step 3** Choose participants **9.** Click *Approved* to apply this same event to other agents. When finished, click *Next.* **10.** Click *Finish.* Refresh or click PC to refresh the report and view the time off event.
Convert work event to time off	
Converting a work event to time off.	**Note:** If an agent is absent, we recommend recording this in the ASAM. If you make a change using the ASAM it will show on the published schedule reports. If you make a change in the published schedule report, it will not show in the ASAM. **1.** Right click on the schedule and select *Convert work event to time off.* **2.** Select the new event type from the drop-down menu.

	3. Select the start and end time of the event. The default is the schedule start time and end time. **4.** *Replace all existing schedule events that overlap this event's start time:* Typically leave this unchecked as the new time off event will be layered on top of the other events on the schedule. **5.** Click *Save*.