

Scheduling and Adherence

How do I create a Schedule?

In the menu, go to **Scheduling > Schedule Calendar**. Clicking a week or weeks that have a forecast and have not been published can be selected, they are displayed on the right, click **Run Schedule**.

How do I edit a schedule?

Click the **Edit** slider. Sliding, stretching and shrinking anything on screen will be possible.

How can I add vacation, holidays or absence to the schedule?

Right click on a day or shift for any agent, right click and **Add Activity**. Choose the parameters required, All Day or a start time and duration.

How do I add activities on the schedule screen?

Right click on a day or shift for any agent, right click and **Add Activity**. Choose any activity from the drop down list with a start time and duration.

How do I add activities using the Activity Calendar?

Go to **Scheduling > Activity Calendar**. Days with activities are shown in green. Click a day or multiple days. Add activity parameters on the right of screen.

How do I create recurring activities?

There are 2 ways to complete this, either in the Schedule or Activity Calendar screens.

How do I pin shifts or activities on the schedule to lock them in place?

Click the slider to allow Edit of a schedule. Use the Pin dropdown box to choose Shifts for the day/week or breaks for the day/week.

How can I search in the schedule screen?

In the field marked **Filter**, enter any information such as a name, team name.

How do I save changes and refresh schedule statistics?

Click the **Save** or **Refresh** button. When clicking **Refresh**, choose to update the statistics for the day or week.

How do I publish or unpublish a schedule?

Can be completed in the Schedule or Schedule Calendar screen by clicking on the tick or cross.

Adherence % Types

There are 3 adherence calculations, Adherence, Tolerance and Straight. All 3 calculations appear in the Adherence Reports.