

## 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.](#)