GENESYS™

Workforce Management Agent Help

Workforce Management 8.5.2

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Workforce Management 8.5 Agent Help

Welcome to Workforce Management (WFM) Agent Help. Use this page to go directly to the information you need, or use the Table of Contents to take a step-by-step tour of all the features and functions available in the WFM Agent application.

Take a tour of the WFM Agent UI.

Link to video

Watch the video for a preview of the features and controls in the WFM Agent UI.

Note that some features might not be enabled in your contact center.

Getting Started

Become familiar with the WFM Agent UI:

- Log in and out
- Menu options and settings
- Change the date

Scheduling and Trading

View and adjust your schedule, propose schedule trades, view other agents' schedules:

- My schedule
- My schedule details
- Other schedules
- Create trade proposals

Availability and Preferences

Use availability patterns, add preferences, and manage time-off requests:

- Availability patterns
- Change your preferences
- Request, edit, delete, and recall time off

Bidding and Configuration

Use schedule bidding and configure WFM Agent:

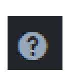
- Bidding scenarios
- Bidding assignments
- Change personal information

Use shared transportation

Overview

Use this Help to find all of the information you will need to understand the features in the Workforce Management (WFM) Agent Application and how it functions.

Opening the Agent Help

Open context-sensitive help topics, by clicking the **Help** icon  at the top right of the WFM window (similar to the one beside your name). A help topic opens in a separate window, describing the window that you currently have open.

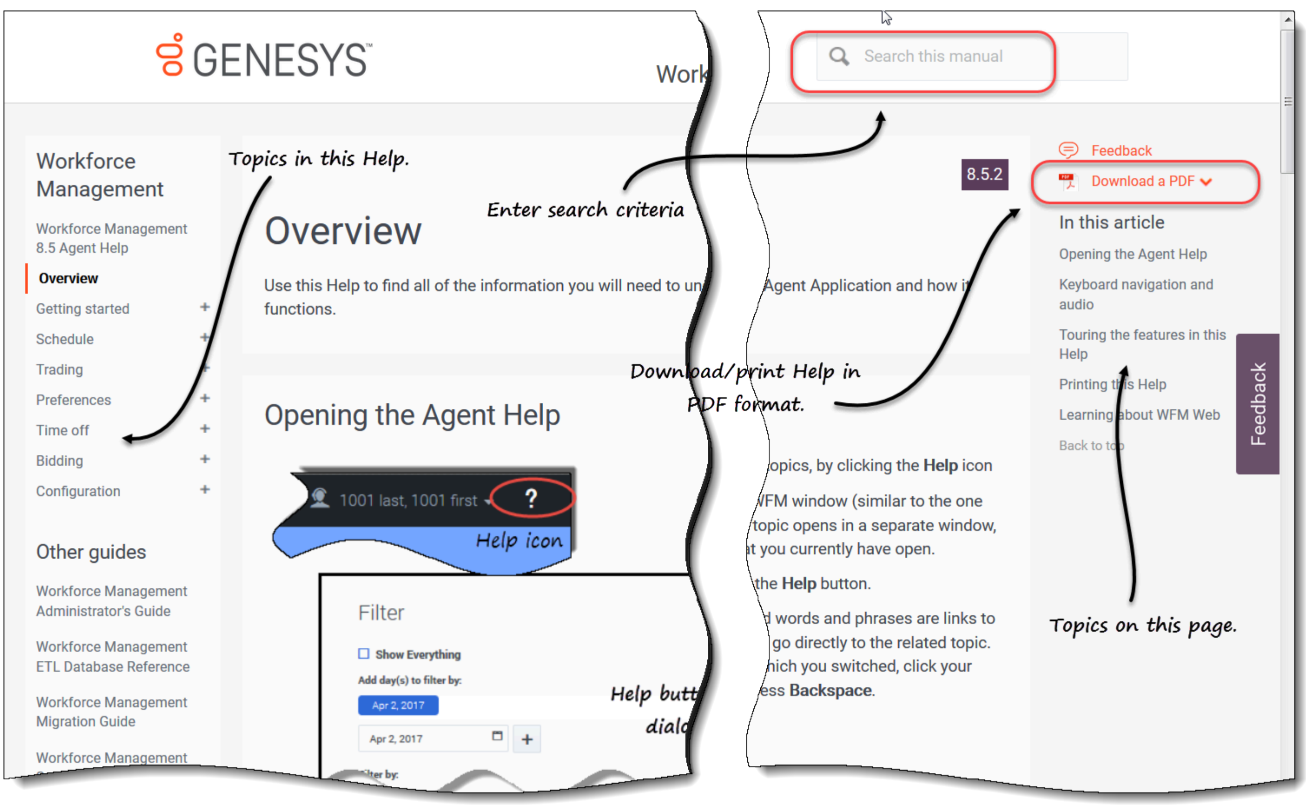
In open dialog boxes, click the **Help** button.

Inside help topics, underlined words and phrases are links to other topics. Click any link to go directly to the related topic. To return to a previous topic, click your browser's **Back** button or press **Backspace**.

Keyboard navigation and audio

If you do not have a mouse to click commands, you can press the **Tab** key to move the "focus" to the command that you want to execute, and then press **Enter** or the **Spacebar**.

Touring the features in this Help



Click any topic in the Table of Contents (TOC) at left side of the Help window to read about the corresponding feature, or you can click the links in Learning About WFM Web to begin exploring help topics.

Click the titles in the TOC on the right side of the Help window to jump to other topics on this page.

Optionally, if you are viewing this Help online, you can generate this Help in PDF format. See Printing this Help.

To find specific information, use the search function at the top of any page to search the Help or to find related information in other documents.

Printing this Help

Use this procedure if you are reading the Help online. If you are opening Help from within the WFM interface, you will not see the option **Download a PDF** mentioned in this procedure. In that case, use the **Print** function in your application to print the file.

> **Tip**
> If you are unsure of which print application is being used in your contact center, ask your supervisor.

To print the Help, complete the following steps:

1. In the top-right corner of the page, click **Download a PDF** and choose **PDF this manual** or **PDF this page**.
2. When the dialog opens, select one of two options:
   - Click **Open with** to select the application, with which you want to view and print the Help. **If you choose this option, you can save it after opening in the application you specify. Adobe Acrobat v9 is recommended.**
   - Click **Save File** to save the Help to a folder on your computer.
3. If you choose to save it, when the download is complete, navigate to the folder in which you saved the .pdf file. Then use the **Print** function in your application to print the file, or open and view the file on your computer offline.

Learning about WFM Web

To learn about WFM Web, click any one of the links below:

Topic	Description
Getting started	Summarizes browser and WFM Web basics, including how to log in and log off, use the date selectors, and change other settings.
Schedule	Describes the Schedule window display, and enables you to view your schedule and other

Topic	Description
	agents' schedules.
Trading	Explains how to create, review, and respond to schedule trading proposals.
Preferences	Explains how to view, add, and edit your shift, availability, and day-off preferences in WFM Web.
Time off	Describes the Time Off view and explains how to add, edit, delete, and bid for time off.
Bidding	Explains how to review and respond to schedule bidding scenarios.
Configuration	Describes your personal information and settings, shared transport, and exceptions totals.

Getting started

You can use the Workforce Management (WFM) Agent UI to:

- View your schedule.
- Bid on schedules in bidding scenarios.
- Bid on overtime hours in overtime offers
- Indicate your schedule preferences.
- See how much time off you have of each time-off type.
- Request time off.
- View other agents' schedules (if enabled at your site).
- Trade your schedule days with other agents (if enabled at your site).
- View and change your personal settings.

Security features

Whether you can view other agents' schedules or other agents can view yours, depends on how your system administrator has set up WFM Web. Regardless of the set up, other agents can never set preferences or make vacation requests for you, nor vice versa.

To ensure system security, WFM Web displays the timestamp information from the previous login in the GUI the next time you log in through the agent desktop or agent mobile interface, alerting you of any unauthorized use of your login credentials.

Accessing WFM on your mobile devices

You can use your mobiles device to access your schedules, plan your time off, and perform many other tasks.

To access the WFM Agent UI on your mobile devices, open your browser (Safari on iOS devices or Google Chrome on Android devices) and enter the same URL that you use to access the Agent UI on your desktop. WFM Agent Mobile Client supports only the latest supported version of Safari and Google Chrome.

The browser screen's *actual* resolution on mobile devices must be at least 320 x 550 pixels. WFM supports nothing less than either dimension.

> **Tip**
> Accessing WFM on mobile devices is not supported in all contact centers, by default. Ask your supervisor about support and if there are any additional security requirements specific to your contact center.

Here's what you can do using the Agent Mobile Client on your mobile device:

- In the **My Schedule** screen and dialogs:
  - See scheduled and pending items with the same color configuration as in the desktop UI
  - Create trade proposals
  - Add or rollback Exceptions
- In the **Trading** screens and dialogs:
  - See and filter a list of trades
  - Respond and add comments to trade requests
- In the **Preferences** screens and dialogs:
  - Add, edit, and delete Preferences (shift, availability, day off)
- In the **Time Off** screens and dialogs:
  - Add, recall, delete, or cancel Time-Off requests
- In the **Configuration > My Settings** screens and dialogs:
  - Change your personal settings

Where next?

Logging in and out

Login timestamp

Changing the date

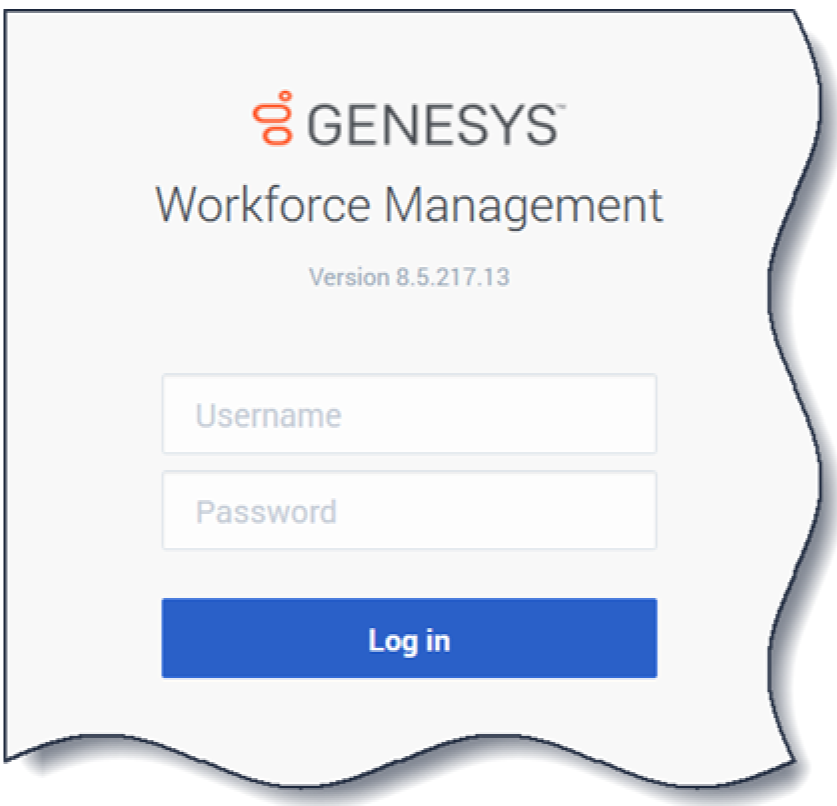
Session expiration

Logging in and out

Before you log in, ask your supervisor for the URL (web address) for WFM Web for Agents application for your desktop (or mobile device). After receiving it, add it to your browser's **Favorites** or **Bookmarks** list so that you can easily return to it.

> **Tip**
> WFM Web is optimized for a screen resolution of at least 1024x768. At lower resolutions, some elements (such as table headers) might not display correctly.

Login dialog



To log in:

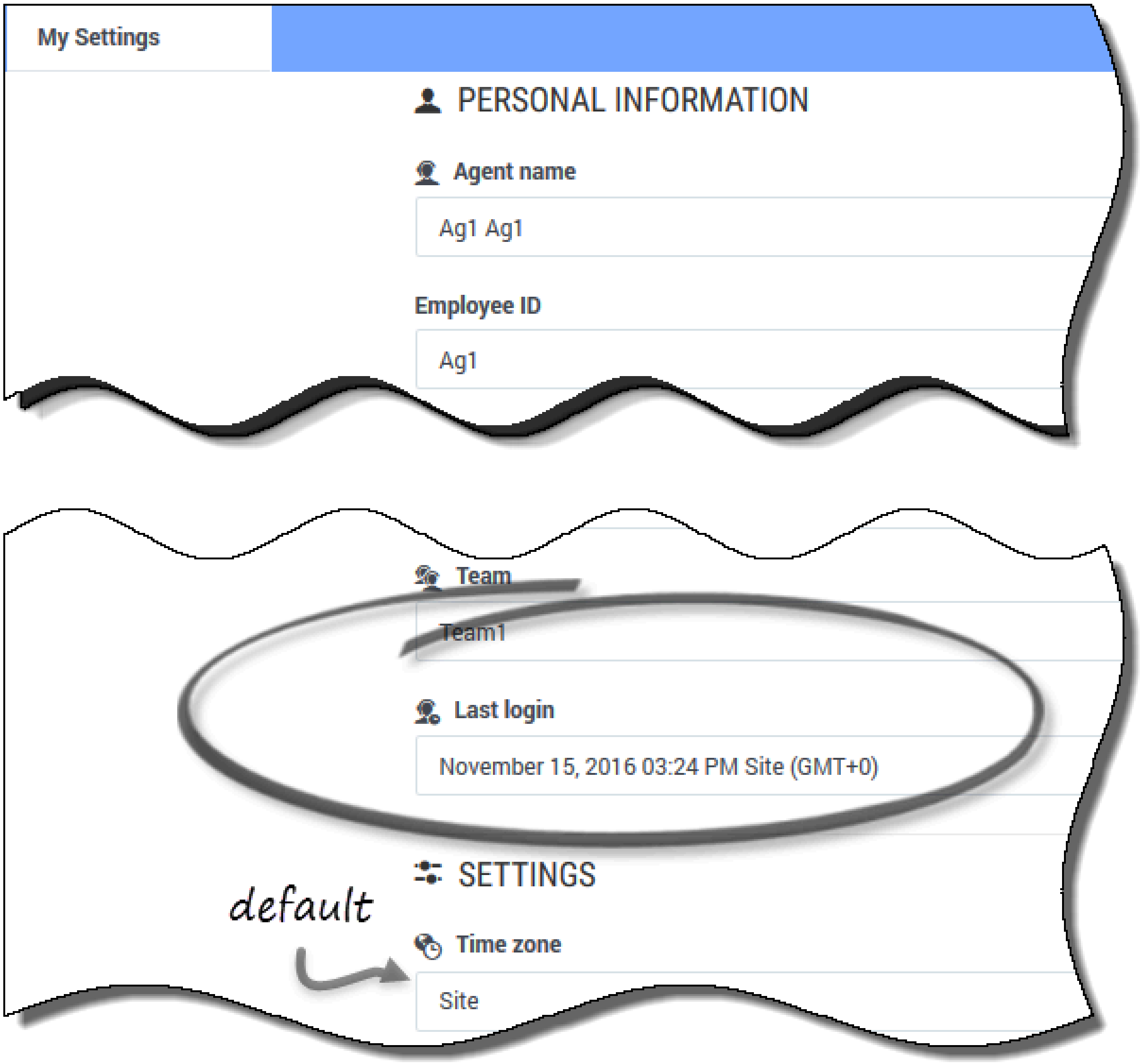
1. Open the Workforce Management (WFM) Agent application.
2. When the splash screen appears, log into WFM by entering your **Username** and **Password**.
   You can log into WFM Web from any computer using a supported web browser.

Important

Open and run WFM Web in only one browser window on your workstation at any given time. Running Web in more than one browser window simultaneously on your workstation can cause the program to behave unexpectedly. (In other words, do not open a second browser window on the same WFM Web session by selecting **File** > **New** or pressing **Ctrl+N**.)

If you must run more than one WFM Web session on the same workstation, launch a separate instance of your browser, then log in to WFM Web again from that browser instance.

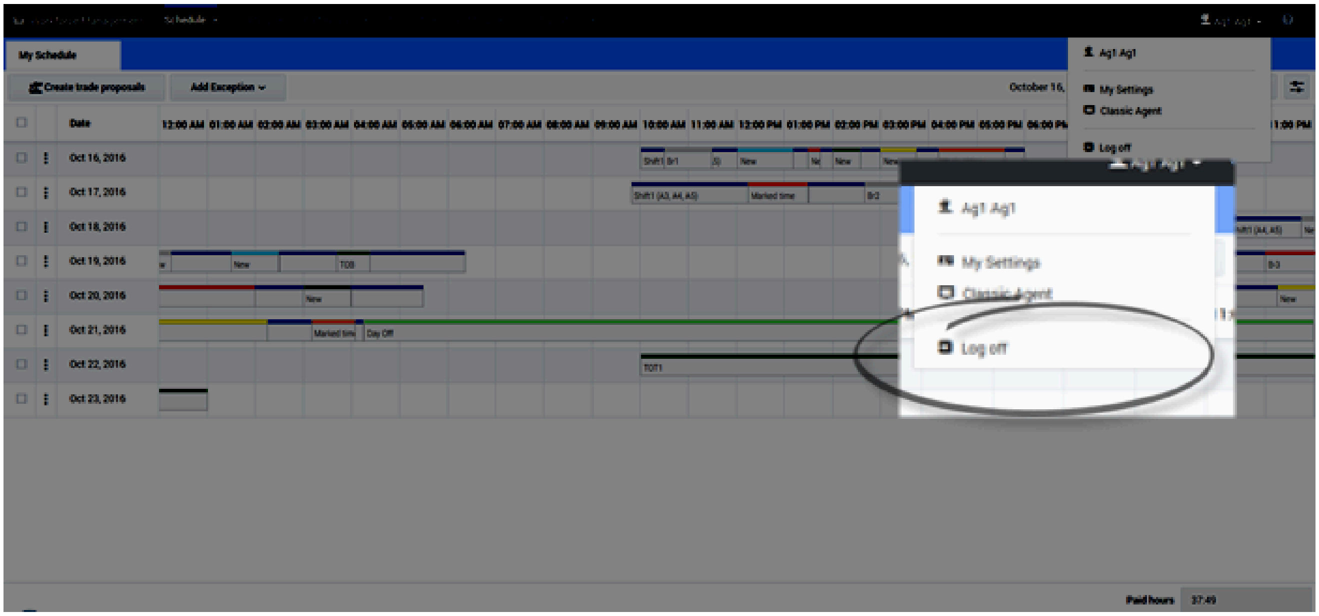
Login timestamp



After you log in through the Agent desktop, the WFM Agent application displays the timestamp information from the previous login, alerting you of any unauthorized use of your login credentials.

The timestamp displays the date and time in the time zone that is shown in the **Time zone** field (**Site** is the default). You can find this information by clicking **Configuration > My Settings** or by clicking your username in the top-right corner of any WFM Agent window and selecting My Settings.

Logging out



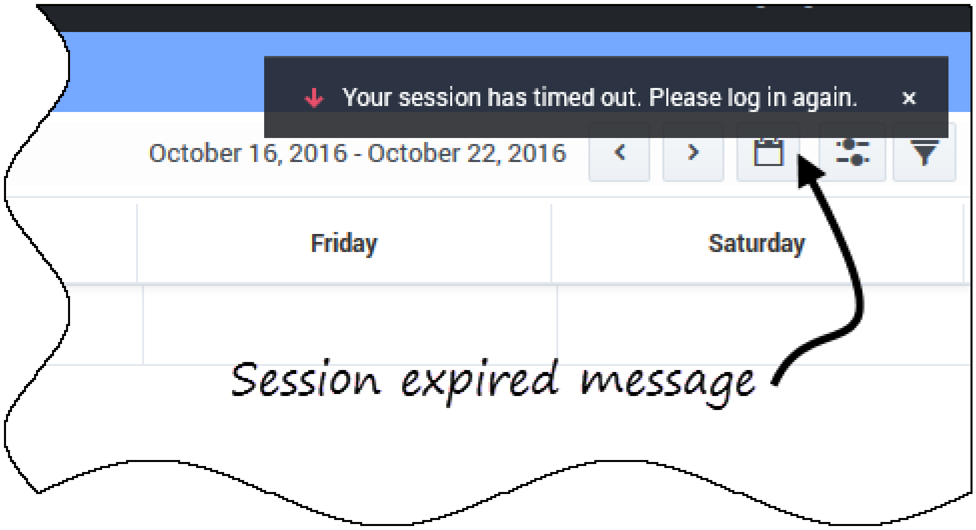
When you are finished using WFM Web, it is important to always log out. If you do not log out, other users might be able to view your account information.

To log out:

1. In the top-right corner of any WFM Web window you have open, click your username.
2. From the drop-down menu that appears, click **Log off**.

This ends your WFM Web session and returns you to the Log In dialog. You can now close your browser if you want to.

Session expiration



A WFM Web session expires if you have not used it for a certain amount of time. If your session expires, and you try to make changes or view certain information, the Session Expired warning appears.

To start using WFM Web again:

1. After a couple of seconds, when the warning message disappears, click your username and then click **Log Off**.
2. When the **Log In** dialog appears, enter your user name and password (just as you would to start using WFM Web).
   If you are finished using WFM Web, close your browser.

Using common settings and controls

Every view in the Workforce Management (WFM) Agent application has a **Menu** bar across the top that lists the names of the modules within the application: Schedule, Trading, Preferences, Time Off, Bidding, or Configuration. Click these names to move from module to module or to see a drop-down list of the views in each module. In the drop-down list, click the views to open them.

> **Tip**
> You might see all of these items on your **Menu** bar or only a few, depending on the options that your supervisor has configured for you.

Your username and the **Help** icon appear in the top-right corner of every window.

Changing the date

When you open the WFM Agent application, your schedule displays the current week, by default. (To change the default setting, see the **On Startup** section of My Settings.)

If you want to display a different week in your schedule, change the date, by using the date arrow buttons **Previous** and **Next** or the pop-up calendar button . See the figure below.

Figure: Date and Calendar buttons

Similar buttons appear in other WFM Web views. In some views, they move you by different time intervals, as discussed below.

To use the date arrows:

- Click to move backward.
  - In the **Schedule**, **Trading**, and **Preferences** views, you reach the previous week.
  - In the **Time Off** view, you reach the previous year.
- Click to move forward.

- In the **Schedule**, **Trading**, and **Preferences** views, you reach the next week.
- In the **Time Off** view, you reach the next year.

To use the pop-up calendar:

1. Click the **Calendar** button .
   A calendar appears.
2. Set new dates:
   1. Click a day to select the week containing that day.
   2. Click the month drop-down list to jump to a different month.
   3. Click or on either side of the year to jump forward or back one year.
3. Click **OK**.
   The window automatically refreshes to match your date selection.

Changing the settings in a view

You can change the settings in all of the views in the Schedule, Trading, Preferences, and Time Off modules (except the **Preferences > Availability Patterns** view).

- Click **Settings** in the upper-right corner of the view to add additional columns or change the data that is displayed.
  The settings are different for each view.

Using the page navigation controls

When any of the WFM Agent views has more than one page of data, use the navigation buttons **First** , **Previous** , **Next** , and **Last** to move between the pages. These buttons are grouped with a numeric indicator of your position within the pages: 1 of 1 .

Using the keyboard to sort columns

You can use the number keys on your keyboard to sort columns in any views that have tables with sortable columns.

To sort columns using the keyboard controls:

1. Place your cursor inside a table.
2. Press the number key on your keyboard that corresponds to the column number, when counting left to right.
   For example, if the column is the third one from the left, press "3". The key acts as a toggle, sorting the column in ascending or descending order.

Viewing graphics in this Help

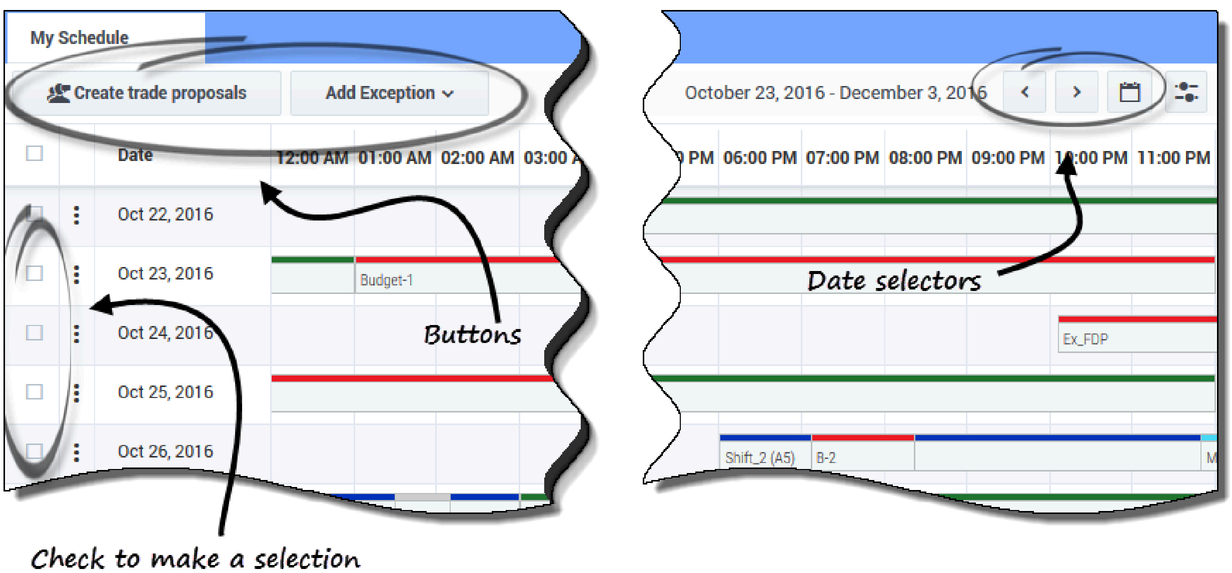
If you are viewing this Help online, click any graphic to enlarge it. Click the "X" in the top-right corner to close the enlarged graphic window.

Schedule

Use the **Schedule** module to view your schedules and its details or view other agents' schedules. Click **Schedule** to reveal the drop-down menu that lists the three views in this module:

- My Schedule—Displays your schedule information. To display any single week or multiple weeks, see Changing the date. This view opens by default after you log in, but you can change the default, see Viewing my settings.
- My Schedule Details—Displays the current (or selected) week's schedule in detail.
- Other Schedules—Displays a filterable, sortable, and searchable list of other agents and their schedules.

Common controls



The **My Schedule** and My Schedule Details views have these common controls:

- Create trade proposals *button*—Opens a dialog box that enables you to create new trade proposals for the days that you have selected in this view.
- Add Exception *button*—Opens a dialog box that enables you to add an exception for the day(s) that you have selected in this view.
- **Pending Schedules** *button*—Works as a toggle, enabling you to view your pending schedules, including exceptions.
- **Date and Calendar** *icons*—For a description of these controls, see Changing the Date.

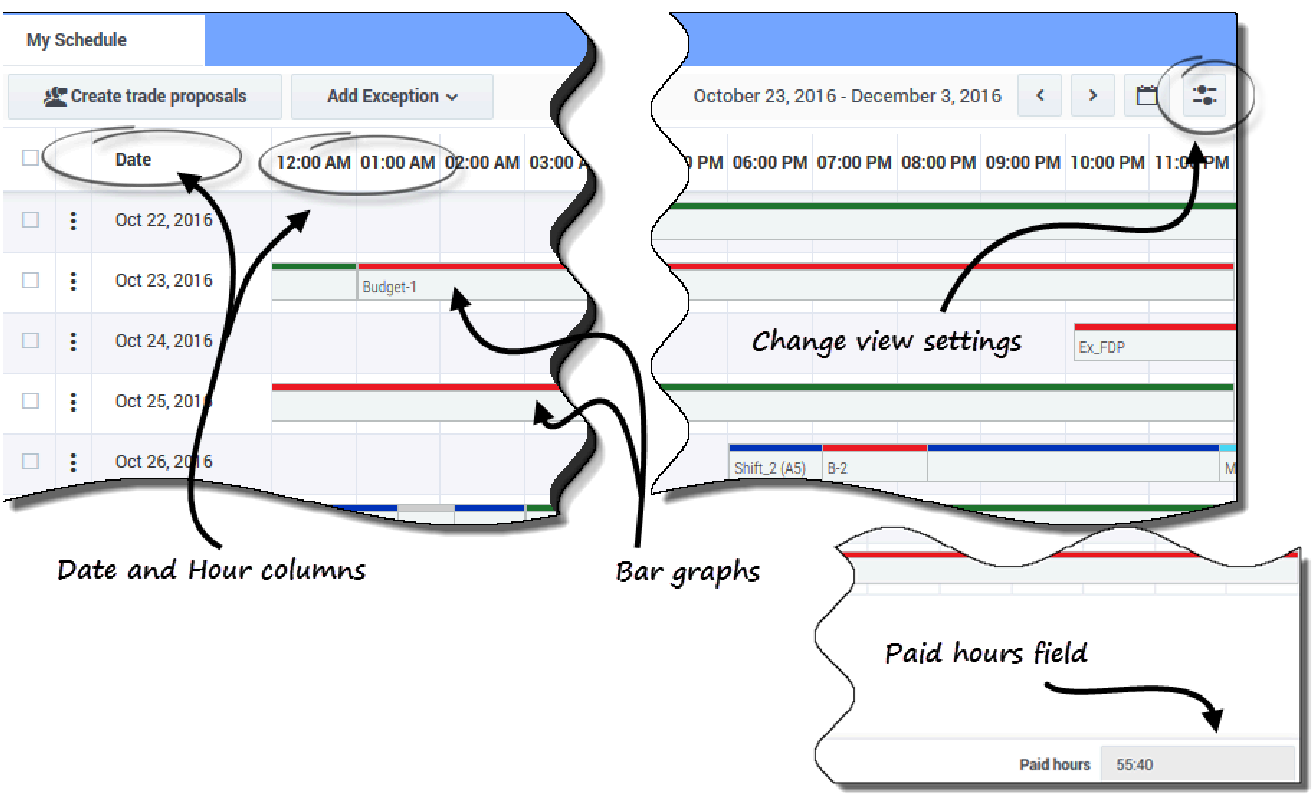
- ☐ *check boxes*—Select the check box in the table's first column for each day for which you want to create trade proposals or add exceptions. Then, click Create Trade Proposals or Add Exception.

> **Tip**
> The **Create trade proposals** and **Add Exception** buttons are hidden if this optional functionality is not enabled for you.

My schedule

The **My Schedule** view displays your schedules in a grid that contains a colored bar graph for each scheduled work day. Each bar graph spans the scheduled hours for the work day, displaying shifts, work items, breaks, meals, and days off in the colors that identify them.

Columns and settings

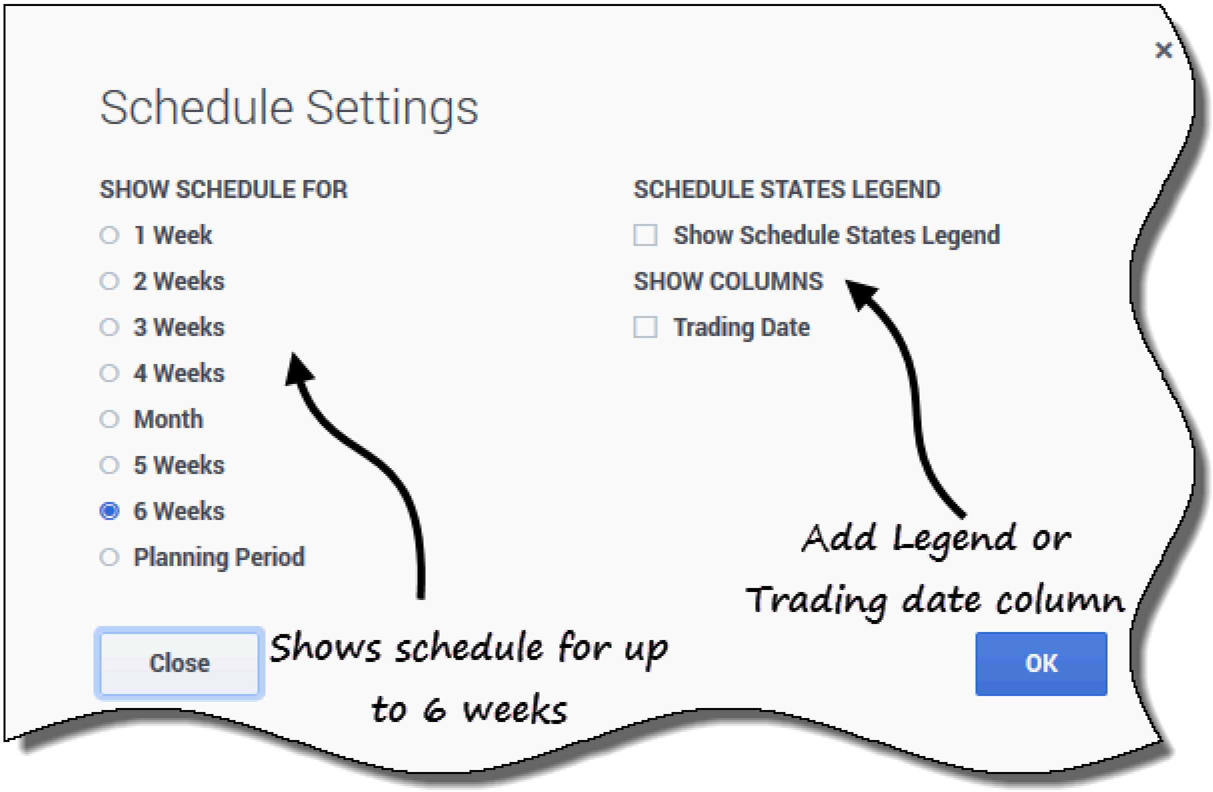


The **My Schedule** view has these additional controls and columns:

- **Settings** *icon*—Open a dialog box that enables you to change the settings in this view. See Changing Settings in the Schedule View.
- **Actions** *column*—Presents a drop-down list, enabling you to roll back any published exceptions you entered and delete pending changes (if any).
- **Date** *column*—Shows each date in the scheduled work week.
- **Hour** *columns*—Span an entire day with each column representing one hour in the day.
- *bar graphs*—Display the shifts, work items, breaks, meals, exceptions, and days off and the colors that identify them in the work day hours. Click any colored cell in the bar graph to view the details of that particular item.
- **Paid hours** *field*—Shows the total paid hours for this schedule period.

> ## Tip
> Pending schedules are visible only when there are uncommitted changes in your schedule, such as an **Exception** you inserted that is not yet approved by a supervisor.

Changing the view settings



To change the information that is displayed in the **My Schedule** view:

1. In the upper-right corner of this view, click the **Settings** icon.
   The Schedule Settings dialog box opens.
2. In the **Show Schedule For** list, choose one of the following radio buttons:
   - **1 week**
   - **2 weeks**
   - **3 weeks**
   - **4 weeks**
   - **Month**
   - **5 weeks**
   - **6 weeks**
   - **Planning Period**
3. Check the **Show Schedule States Legend** check box if you want to display the legend at the bottom of this view.
4. Check the **Trade Date** check box if you want to display that column in the schedule grid.
5. Click **OK** to display your selections, or **Close** to discard them.

Rolling back schedules

In this view, you can click **Actions** to open a drop-down list, enabling you to rollback a published schedule. Selecting **Rollback** in the list, rolls back any schedule changes you've made (for example, if an exception was auto committed immediately) and reverts your schedule to the previous state.

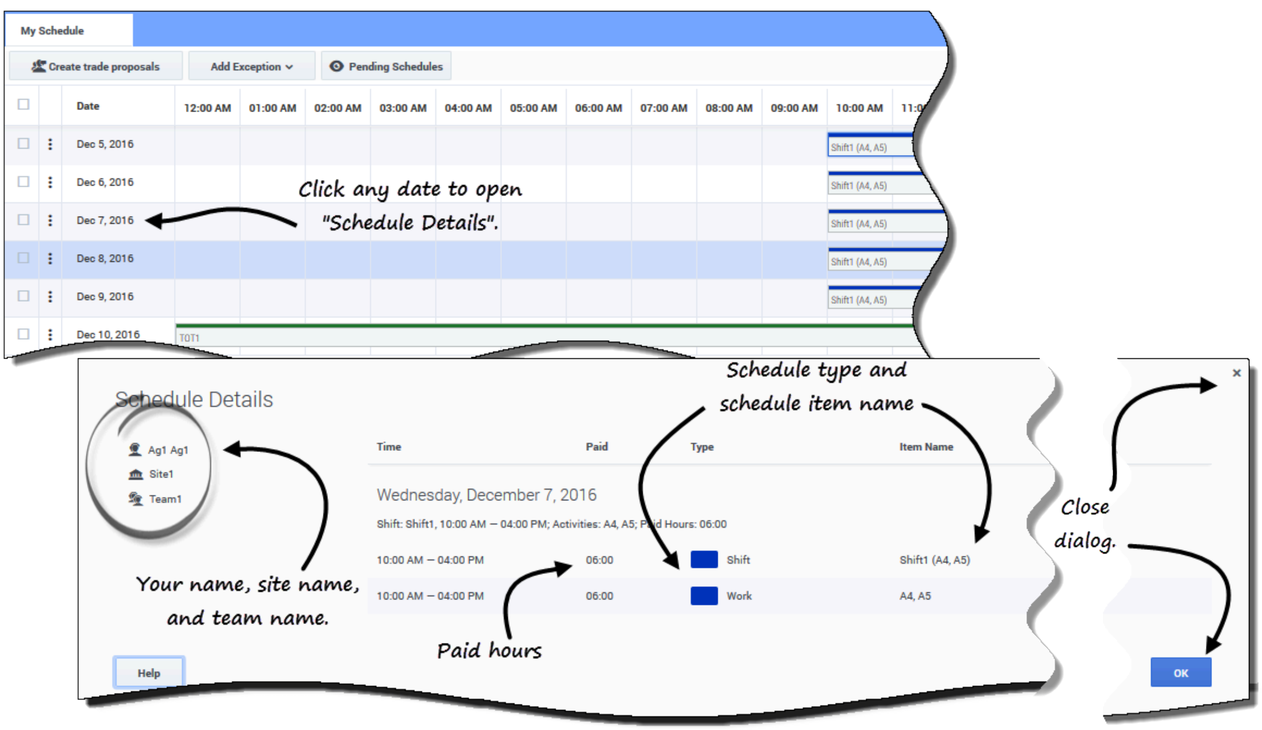
To roll back a schedule, see the procedure in My Schedule Details

Deleting pending schedules changes

At the top of this view, toggling on the Pending Schedules button displays changes that are requested but not yet approved. Clicking **Actions** , opens a drop-down list, enabling you to delete pending changes in your schedule that are not yet approved by your supervisor.

To delete pending changes in your schedules, see My Schedule Details

Opening schedule details for a specific date

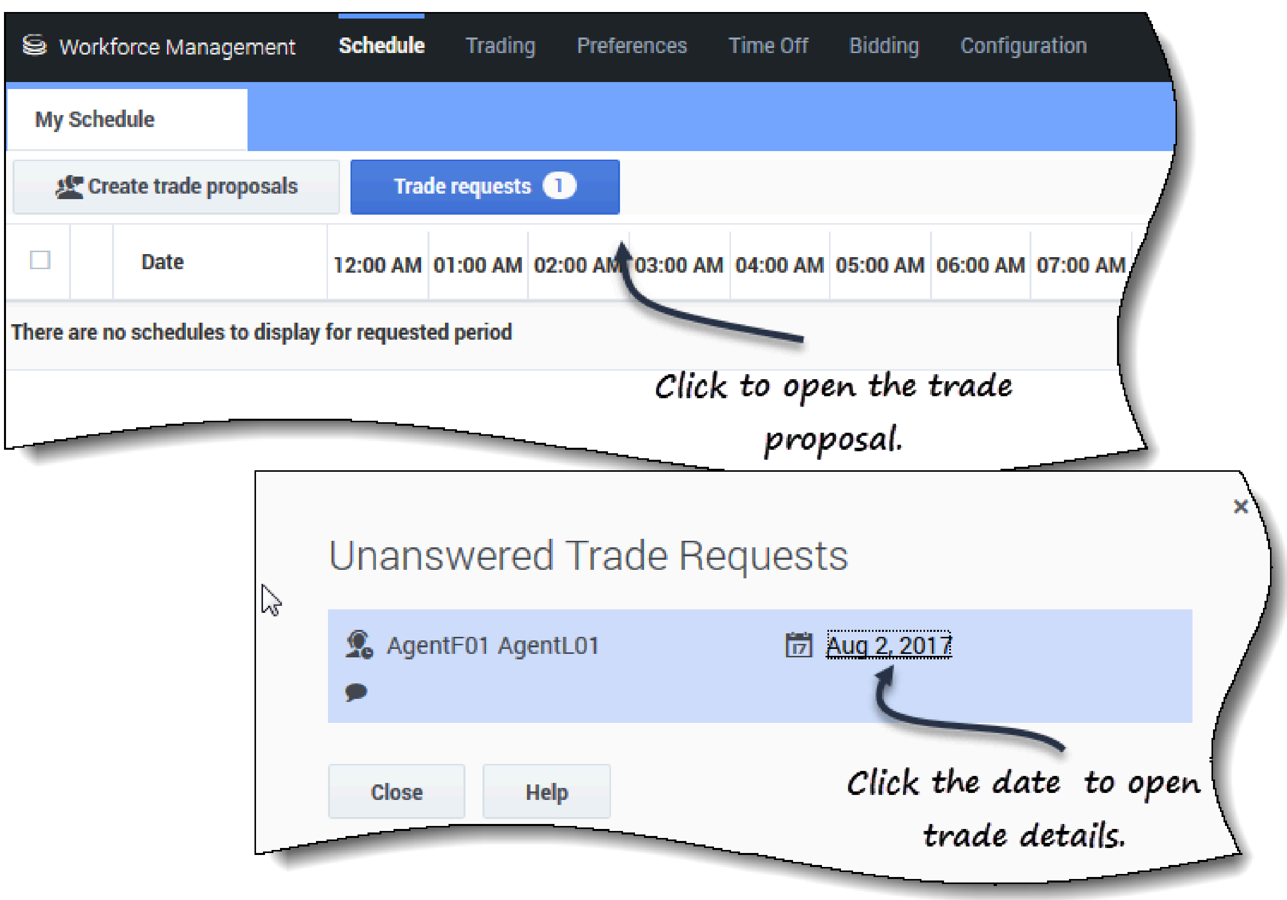


In **My Schedule** view you can open the schedule details for a specific date in a separate dialog, by clicking any date in the **Date** column. The **Schedule Details** dialog opens showing your name, site, and team name, and the following information in columns:

- Time
- Paid (hours)
- Type (of schedule item, color-coded)
- Item Name (schedule item name)

Viewing trade requests

If your site allows schedule trading, there might be **Trade requests** button at the top of this view. It alerts you to any open trade proposals or responses and shows the number of unanswered requests in brackets. For example, (2). The button displays only if there are open proposals awaiting your response.



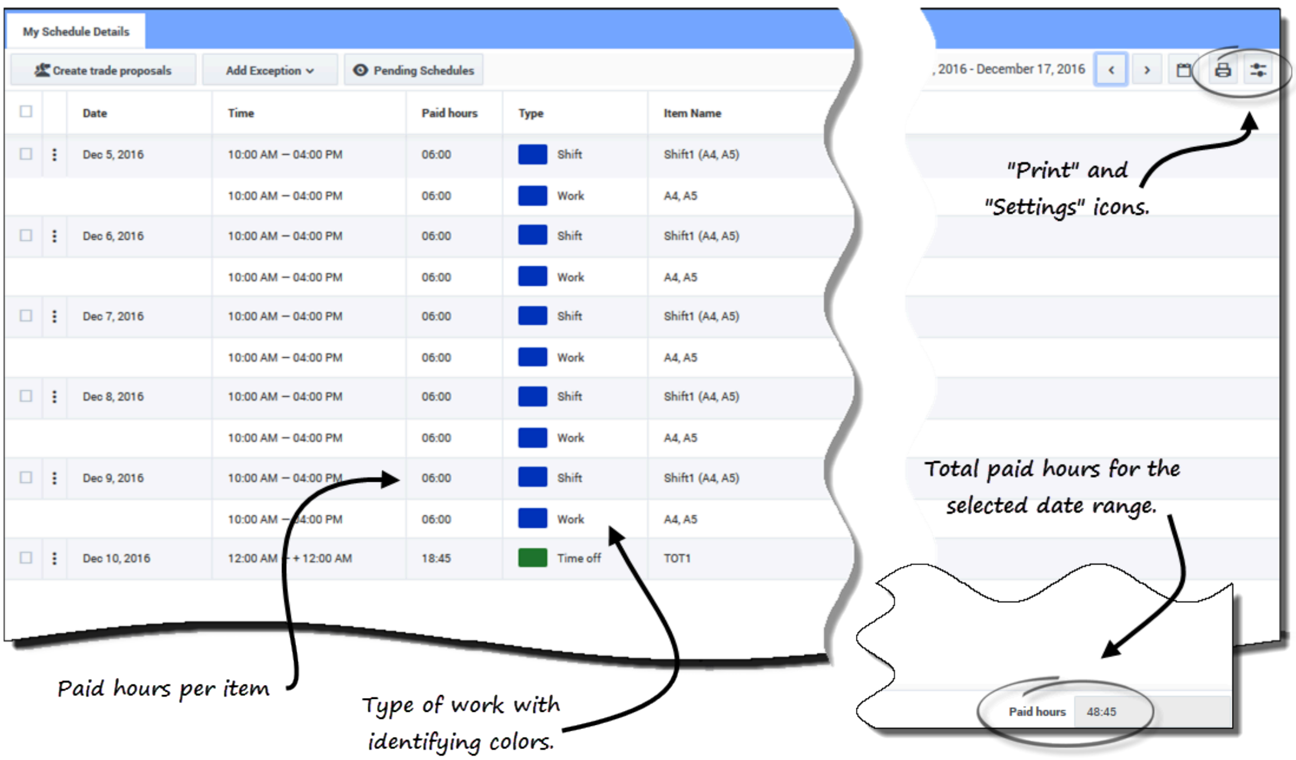
To view the trade request:

1. Click **Trade requests**.
   The Unanswered Trade Requests dialog box opens, showing the agent who is making the requests, comments about the trade, and the trade proposal date.
2. Click the date.
   - If single-site trading is permitted, the **Trading** > **Proposals** view opens, enabling you to see trade details and proceed with the proposal.
   - If multi-site trading is permitted, the **Trades** view opens, filtered by **Offered to me**.

Viewing your schedule details

The **My Schedule Details** view displays the same information as the My Schedule view, but in a different format. It shows what activities you are scheduled to perform each day and displays information about meals and breaks, your time off, exceptions, and days off.

Columns and controls

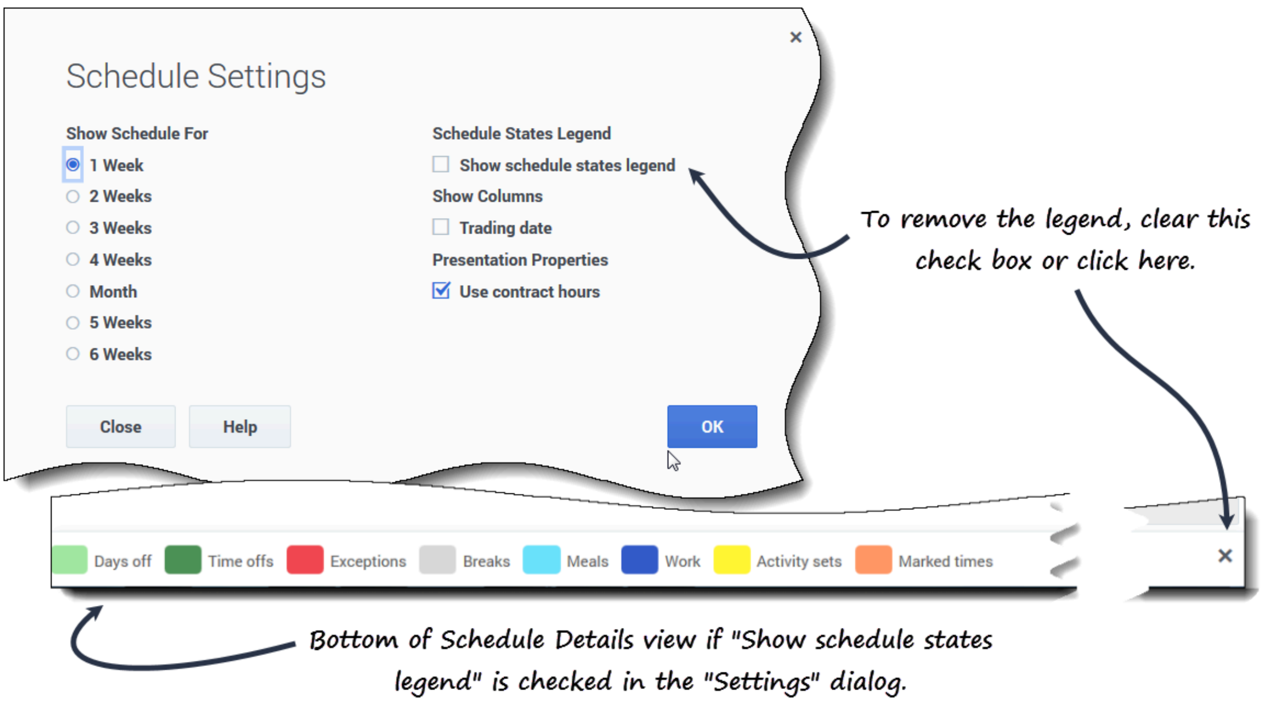


In addition to the common controls described in **My Schedule**, this view has these additional columns and controls:

- **Print** *icon*—Opens a separate window, displaying your schedule details in a printer-friendly format. See Printing Your Schedule Details.
- **Settings** *icon*—Opens a dialog box that enables you to select the information you want to see in the schedule details grid. See Changing Settings in the Schedule Details View.
- **Date** *column*—Shows each date in your schedule for the selected date range.
- **Time** *column*—Shows when you are scheduled to start and end your shift and the start and end time for each schedule item during your workday.

- **Paid hours** *column*—Shows the total paid hours for each workday item. Items that are not paid are shown as 00:00. (The total paid hours for the period are displayed in the bottom-right corner of this view.)
- **Type** *column*—Shows the type of each item (with its identifying color) in the workday.
- **Item Name** *column*—Shows the name of each item in the workday.

Changing the view settings

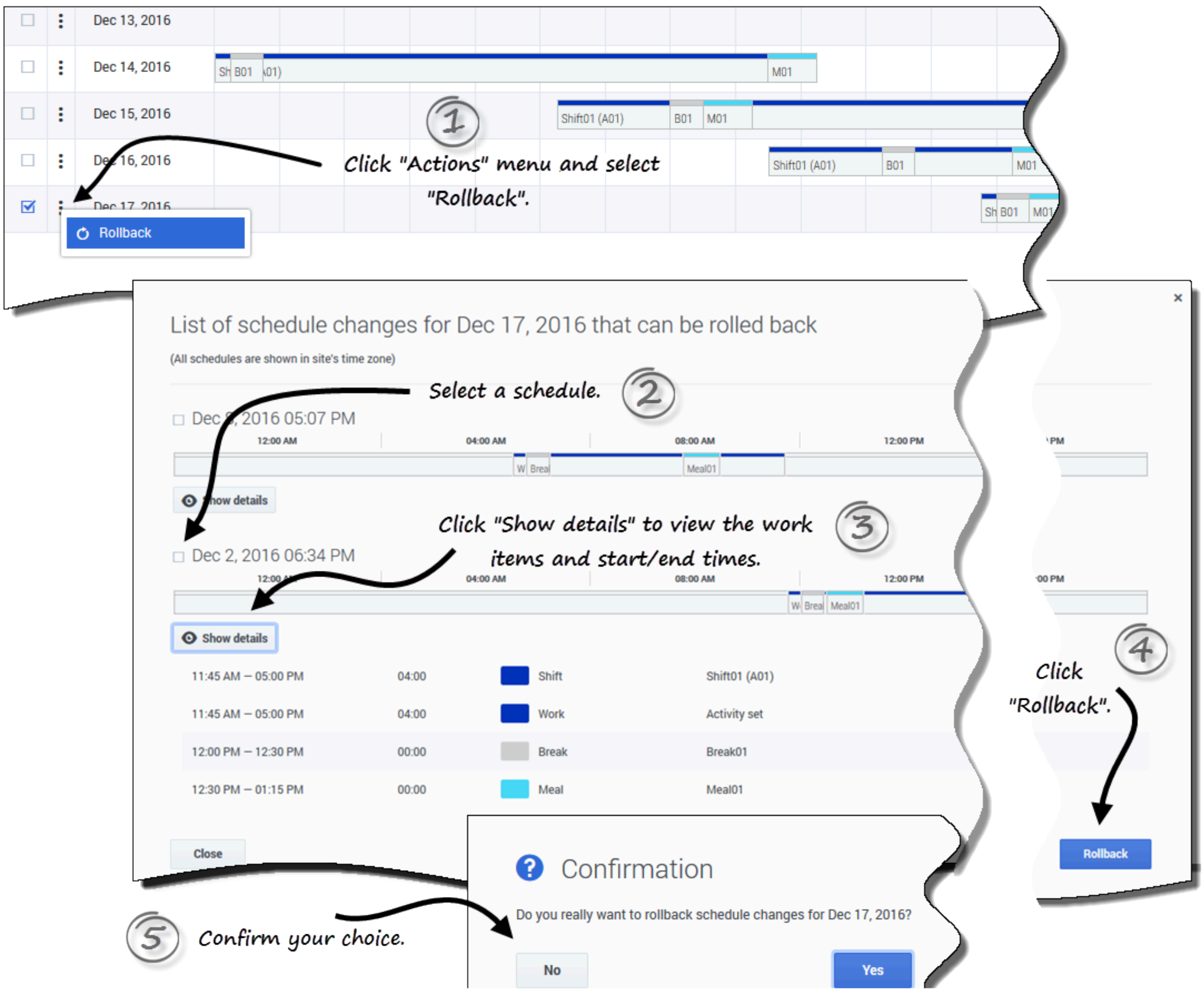


To change the information that is displayed in the **My Schedule Details** view:

1. In the upper-right corner of this view, click the **Settings** icon.
   The Schedule Details Settings dialog box opens.
2. In the **Show Schedule For** list, choose the time period by clicking one of the six radio buttons (shown in the graphic).
3. Check the **Show Schedule States Legend** check box to see the legend at the bottom of this view.
4. Check the **Trading Date** check box if you want to see that column in the schedule grid.
5. Check the **Use contract hours** check box if you want to see only the range of hours in your contract.
6. Click **OK** to display your selections, or **Close** to discard them.

Rolling back schedules

In this view, you can click **Actions** to open a drop-down list, enabling you to roll back a published schedule. Selecting **Rollback** in the list rolls back any schedule changes you've made (for example, if an exception was auto-committed immediately) and reverts your schedule to the previous state.



To roll back a schedule:

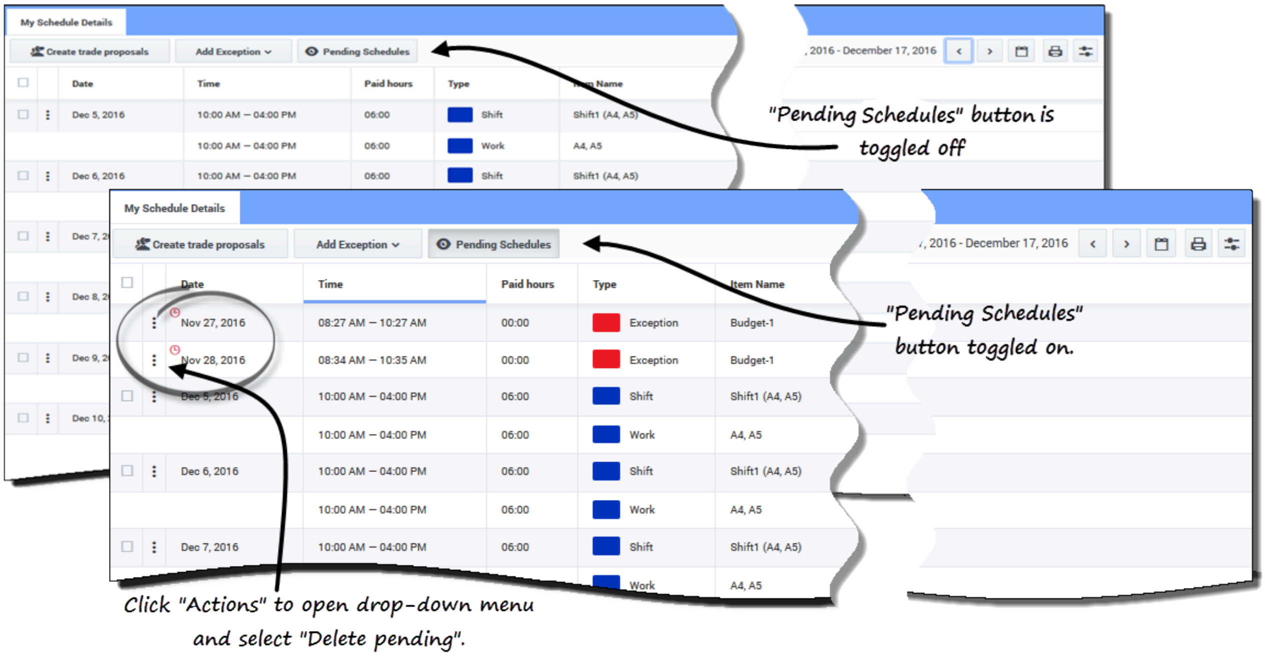
1. In the row that contains the schedule you want to roll back, click **Actions** .

2. Select **Rollback**.
   A dialog opens containing a list of schedules that can be rolled back.
3. (Optional) Click **Show details** to view all of the work items in this schedule and their start/end times.
4. Select the schedule you want to roll back, and click **Rollback**.
5. When the Confirmation dialog opens:
   - Click **Yes** to roll back the changes.
     The schedule is restored to its previous state and appears in the Schedule views.
   - Click **No** to discard the changes and close the dialog.

> Tip
> The list of schedule changes in step 2 is empty if there are no available schedules for you to roll back.

Deleting pending schedule changes

At the top of this view, toggling on the Pending Schedules button displays changes that are requested but not yet approved. Clicking **Actions**  opens a drop-down list, enabling you to delete pending changes in your schedule that are not yet approved by your supervisor.



To delete pending changes in your schedule:

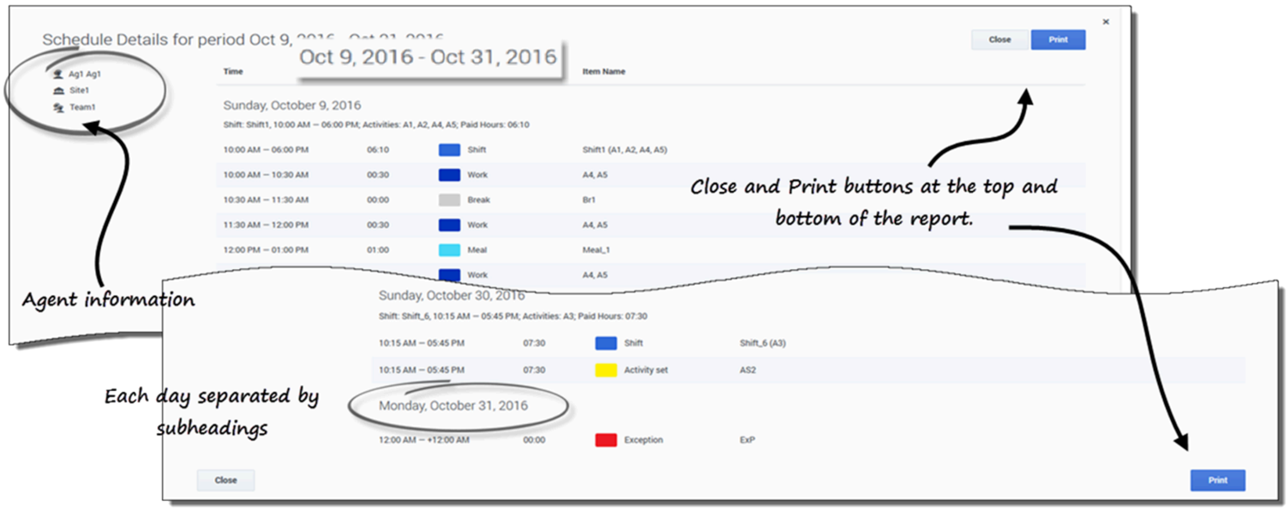
1. In the row that contains the schedule you want to change, click **Actions** .
2. Select **Delete pending**.
3. When the Confirmation dialog opens, click **Yes** to delete pending changes or **No** to cancel the action and close the dialog.
   The pending changes are deleted.

Viewing trade requests

If your site allows schedule trading, there might be a **Trade Requests** button at the top of this view. This button indicates that there are open trade proposals or responses and shows the number of unanswered requests in brackets. The button displays only if there are open proposals awaiting your response.

See Viewing Trade Requests in the Schedule topic for more information about the dialog that opens when you click this button.

Printing your schedule details



To print your schedule details:

1. In the upper-right corner of this view, click the **Printer** icon.
2. A separate window opens with your schedule details formatted in a printer-friendly format. (See figure.)
3. Click **Print**.
4. When printing is finished, click **Close**.

Tip

To use the Print function in this view, you must have access and be connected to a printer. Ask your supervisor for the printer name and details before you print your schedule.

Creating trade proposals

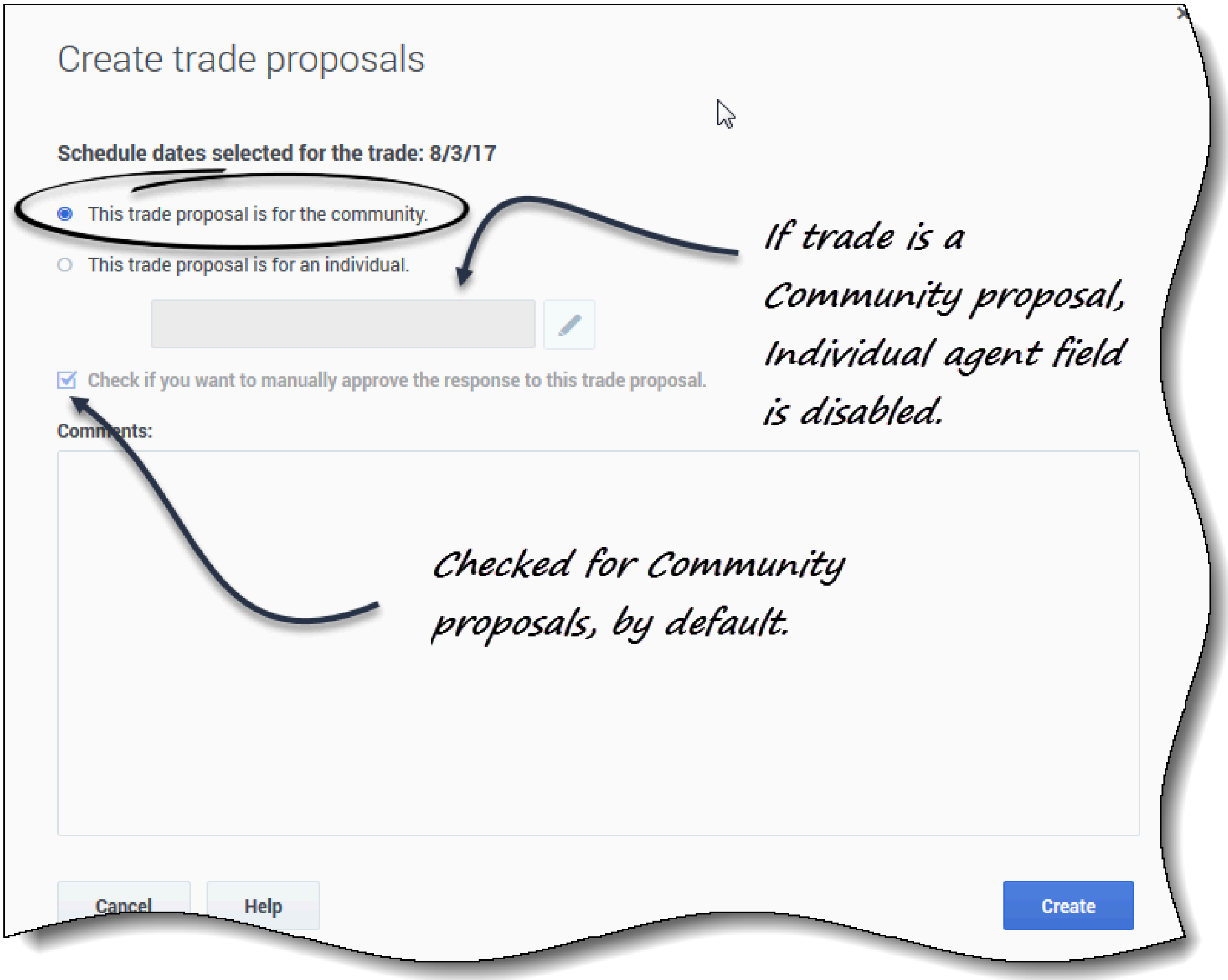
Create trade proposals, by using either My Schedule, My Schedule Details, or Other Schedules view.

To propose a schedule trade:

1. In the first column of the schedule grid, select the check boxes beside the schedule days that you want to trade, then click **Create trade proposals**.
   When the dialog box opens, its first line lists the date(s) that you selected.
2. Select either:
   - **This trade proposal is for the community** or
   - **This trade proposal is for an individual**

   Your choice determines who will be offered your proposal. The community option includes all agents in your team, site, and business unit, depending on how your system administrator has set up WFM Web.
3. Follow the procedure that matches your choice, below.

Sending a trade proposal to the community



If you select **This trade proposal is for the community** in step 2, the **Check if you want to manually approve the response to this trade proposal** check box is selected by default.

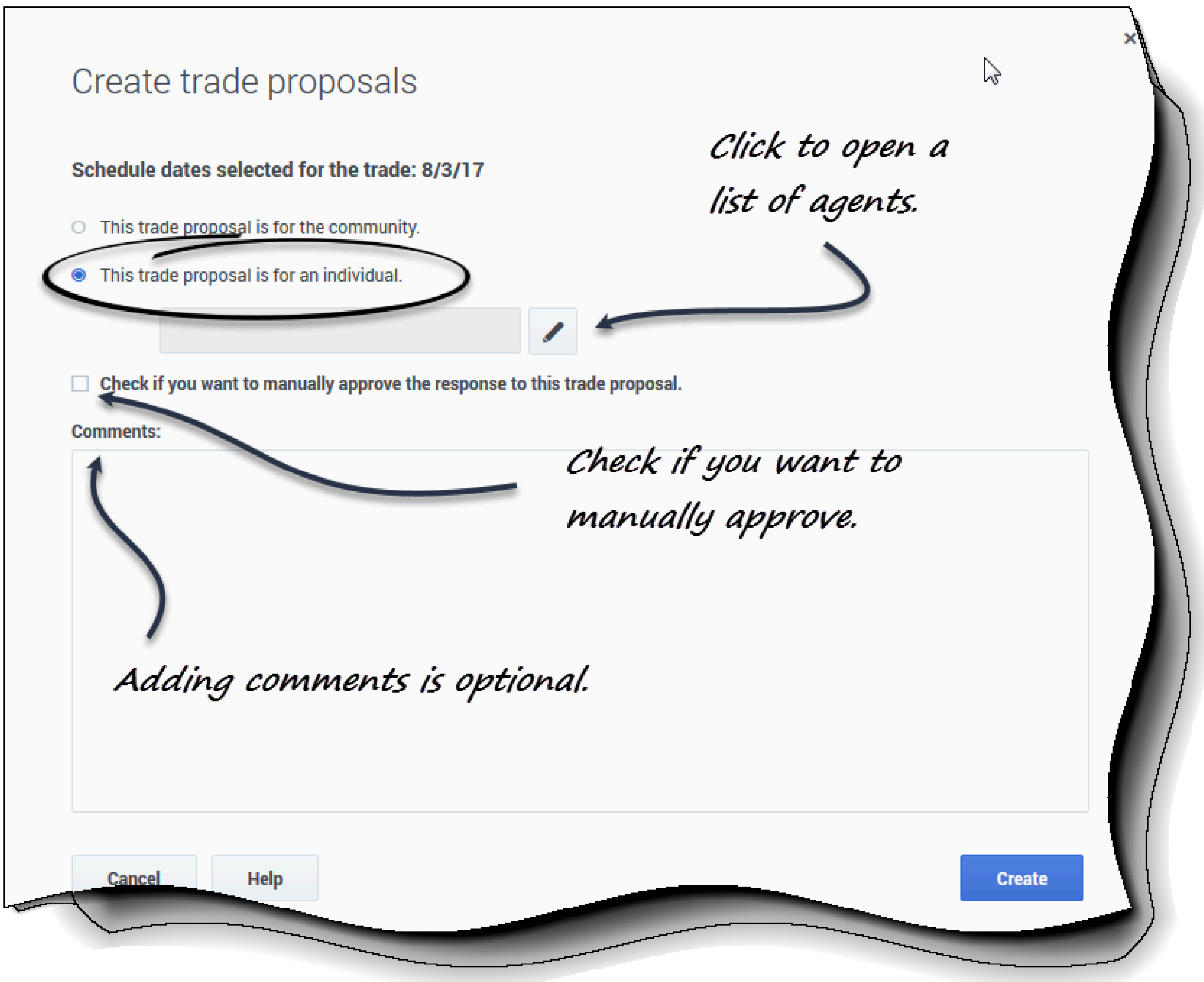
You must confirm (accept) one response to submit the trade for approval.

1. Optionally, enter comments about this proposal.
2. Click **Create** to send the proposal, or **Cancel** to delete it.
   If you choose Create, the My Trades view opens displaying a list of your existing trades, including this one.

Tip

You can enter comments in schedule trade proposals only if your system administrator has enabled the Commenting feature.

Sending a trade proposal to an individual



If you selected **This trade proposal is for an individual** in step 2, above:

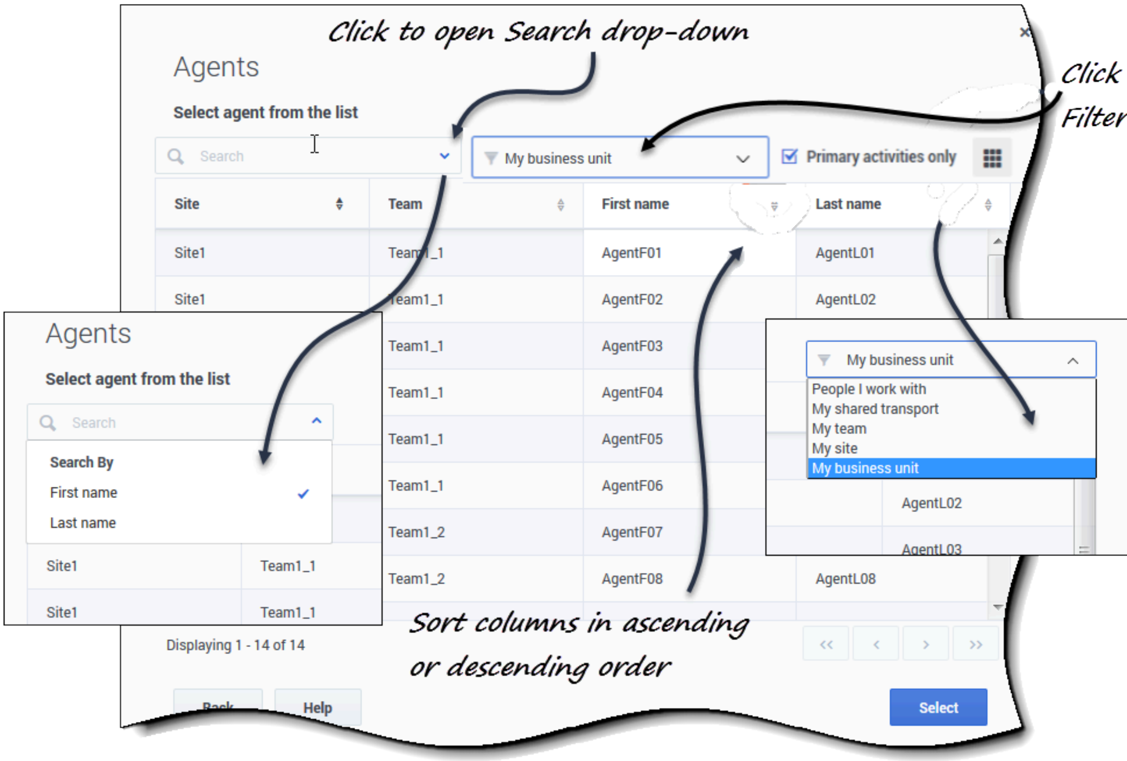
1. Click **Edit** ✎ to open a list of agents available for schedule trading.

2. Click (to highlight) the row containing the agent with whom you are trading schedules and then, click **Select**.
3. Optionally, select **Check if you want to manually approve the response to this trade proposal**.
4. Optionally, enter comments about this proposal in the large text box near the bottom.
5. Click **Create** to send the proposal, or **Cancel** to delete it without sending it.
   If you choose Create, the My Trades view opens displaying a list of your existing trades, including this one.

Notes about creating and sending trade proposals

- In step 1 above, you might select the agent's name from a drop-down list (instead of from the List of Agents, as shown below), depending on how your system administrator has set up WFM Web and trading in your contact center.
- You can also create trade proposals when Viewing other agents' schedule details.
- In step 3 above, choosing to manually approve the response to a trade means you must explicitly confirm the other agent's acceptance of this proposal for the trade to take place. Clearing the box means the trade will be submitted for approval immediately, without your intervention, after the other agent accepts it.

Viewing a list of agents



When you create a trade proposal for an individual and click **Edit** in the Create Proposal dialog, a list of agents opens in a separate window with these columns and controls:

- Sort any one of the four columns, **Site**, **Team**, **First name**, **Last name** in ascending or descending order by clicking **Sort** in the column header.
- Search for agents by clicking the drop-down menu and selecting **First name** or **Last name** and then, type the agent's name.
- Filter agents by:
  - **People I work with** (selected by default)—Filters the list to show only agents in your business unit that work on the same activities or multi-site activities as you, making it easier for you to find and interact with colleagues who can help resolve complex issues.
  - **My shared transport**—Filters the list to show only agents in your shared transport group.
  - **My team**—Filters the list to show only agents on your team.
  - **My site**—Filters the list to show only agents in your site.
  - **My business unit**—Filters the list to show only agents in your business unit.

- **Primary activities only** (selected by default)—Filter the list to show only agents that match all of your primary activities. If the filter is not selected, the list includes all agents with activities that match at least one of your primary or secondary activities.
- Click **Back** to return to the **Create trade proposals** dialog.

> **Tip**
> Different selections will appear in the **Filter** drop-down menu, depending on how Trading is administered in your site.

Adding exceptions to your schedule

Exceptions define periods of time when you are engaged in non work activities or are absent, such as in training or meetings. Supervisors or managers configure a set of Exceptions that can be used in your site, based on business requirements. You can add exceptions to your schedule, by using either the **My Schedule** view or **My Schedule Details** view.

To add an exception to your schedule:

1. In the first column of the schedule grid, select the day(s) on which this exception will apply, and click **Add Exception**.
2. Choose one of two options:
    - Specify Place for Exception
    - Find Place for Exception
3. Follow the procedure below that matches your choice.
   Your supervisor specifies the start and end dates for the Allowed Range and sets the limitation.

Tip

To rollback or delete exceptions or other schedule changes, see Rolling back schedules and Deleting pending schedule changes.

Specifying a place for an exception

Link to video

If you choose **Specify Place for Exception**:

1. (Optional) If you want to specify different settings for each added request, click **Populate**.
   If each preference has the same settings, you don't need to use this option.
2. Select an Exception type from the drop-down list.
   The Full Day check box is selected if this exception is a full-day exception, and cleared if it is not. You cannot change this setting as the check box is read-only.
3. Enter the **Start time** and **End time** for this exception in hours and minutes.
   The start time must occur before the end time.
4. If the exception start or end time is on the next day, select the appropriate **Next Day** check box.
    - **The hours 12AM ... 12PM represent times in the current day.**
    - **The hours +12AM ... +12PM represent times in the next day.**

5. If this is a full-day exception, enter the total **Paid hours** in hours and minutes.
This setting is disabled for part-day exceptions.
6. In the **Memo** field, enter information about this exception that you think your supervisor should know.
7. Click **OK**.

Finding a place for an exception

Link to video

If you choose **Find Place for Exception**:

1. Select an Exception type from the drop-down list.
WFM populates the Earliest Start Date, Earliest Start Time, Latest Start Date, Latest Start Time, and the Next Day check box (if applicable).
2. Enter the **Duration** of this exception in hours and minutes.
3. Clear any of the **Possible weekdays** check boxes that you want to exclude for this exception.
All check boxes are selected by default.
4. In the **Memo** field, enter any additional information about this exception that you think your supervisor should know.
5. Click **OK**.

> **Tip**
> If you click **Close** or the "x" in the upper-right corner of either the **Specify a Place for Exception** or **Find a Place for Exception** dialog boxes, any values you have entered or selections made will not be saved

Inserting exceptions with payback

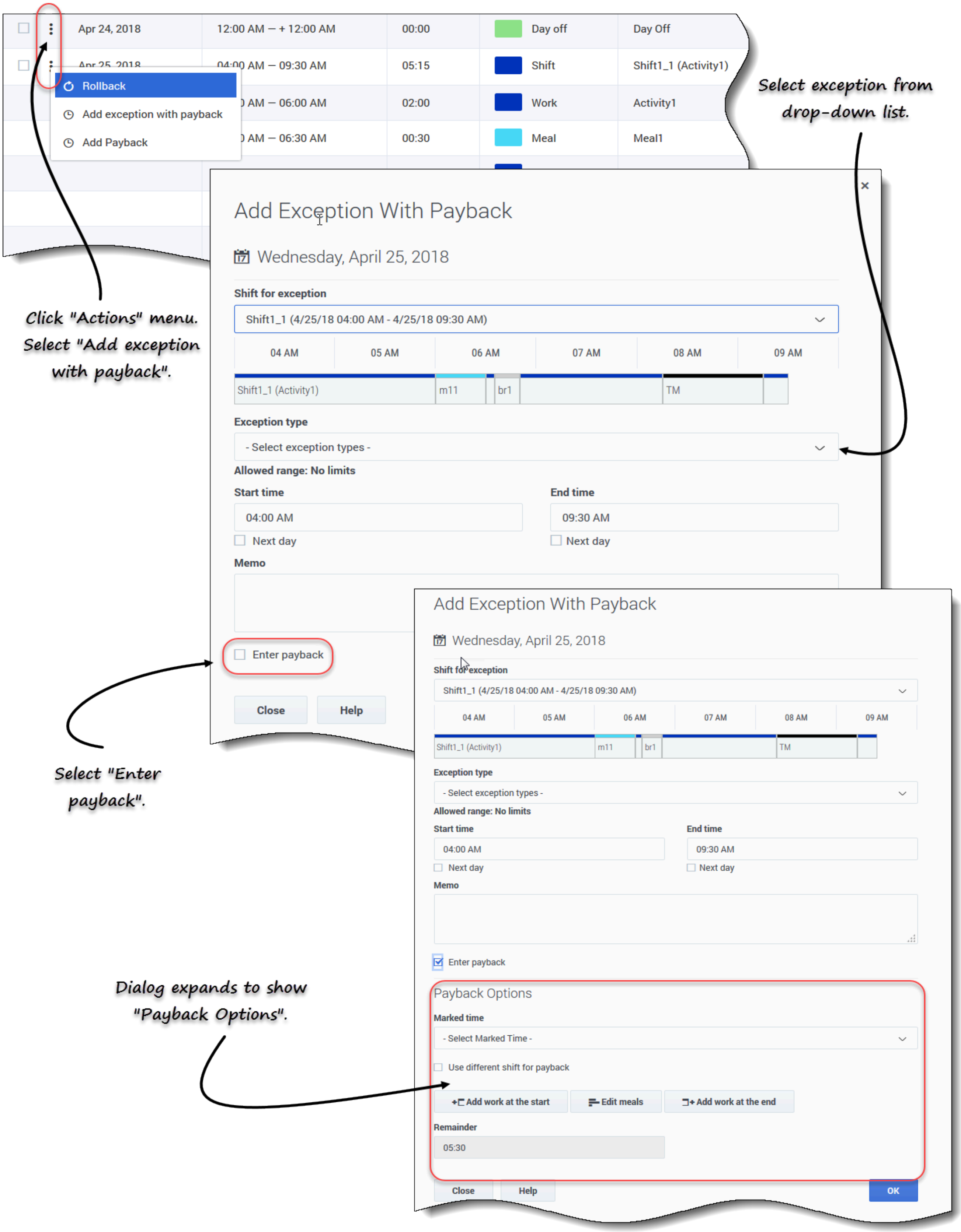
Use exceptions with payback to make up for any personal, missed time in your shifts (for example, if you were late or had an appointment). You'll insert exceptions with payback as unpaid, part-day exceptions.

You can add payback:

- Optionally, when entering exceptions. Add an exception only by leaving the **Enter payback** check box unchecked and clicking **OK** to submit the request. See step 6 in the procedure below.
- As a separate request. See Inserting payback only.
- For the current date, to the end of a shift and/or over meals by decreasing meal duration.

- For future dates, to the beginning of a shift, end of a shift, and/or over meals by decreasing meal duration.
  To decrease the meal duration, edit the start/end time by setting the start time later and/or the end time earlier. You can decrease the meal duration, but you cannot move the meal from it's slotted time.

> **Tip**
> You might not have permission to add payback exceptions to your shift. If you are unable to use this feature, ask your supervisor if payback is permitted in your contact center.


Apr 24, 2018
12:00 AM — + 12:00 AM
00:00
Day off
Day Off
Apr 25, 2018
04:00 AM — 09:30 AM
05:15
Shift
Shift1_1 (Activity1)
Rollback
Add exception with payback
Add Payback
AM — 06:00 AM
02:00
Work
Activity1
AM — 06:30 AM
00:30
Meal
Meal1
Select exception from drop-down list.
Add Exception With Payback
Wednesday, April 25, 2018
Shift for exception
Shift1_1 (4/25/18 04:00 AM - 4/25/18 09:30 AM)
04 AM
05 AM
06 AM
07 AM
08 AM
09 AM
Shift1_1 (Activity1)
m11
br1
TM
Exception type
- Select exception types -
Allowed range: No limits
Start time
04:00 AM
Next day
End time
09:30 AM
Next day
Memo
Enter payback
Close
Help
Click "Actions" menu. Select "Add exception with payback".
Select "Enter payback".
Payback Options
Marked time
- Select Marked Time -
Use different shift for payback
Add work at the start
Edit meals
Add work at the end
Remainder
05:30
OK
Dialog expands to show "Payback Options".

To insert exceptions with payback to your schedule:

1. In the row that contains the shift to which you want to add the exception, click **Actions** ⋮.
2. Select **Add exception with payback**.
   The Add Exception with Payback dialog opens.
3. Select the shift that will be used for this exception.
4. Select an Exception type from the drop-down list.
   The allowed date range appears below the Exception field.
5. (Optional) In the **Memo** field, enter any information relating to the payback that might be useful to your supervisor.
6. If you are adding an exception only, this is the final step. Click **OK**.
7. (Optional) Select the **Enter payback** check box.
   The dialog expands to show Payback Options.
8. From the drop-down list, select the Marked time type that will be used for payback.
9. }If you want to choose another shift for the payback, check **Use different shift for payback**.
10. Click the **Payback Date** field and select the date for the payback interval you are inserting.
    The dialog expands to show the schedule for this date.
11. Select the shift that will be used for payback.
12. Click one or more of the buttons that appear below the Schedule bar.
    For example, if you select one or more buttons, the dialog expands as shown in the figure on the left.
13. Make the necessary changes to the **Start Time** and/or **End Time** fields.
14. If the end time runs into the next day, select the **Next day** check box.
15. Click **OK**.

Tip

If you click **Edit meals** when adding payback to a shift that does not allow meals to be changed, WFM displays the message: *No meals can be changed*.

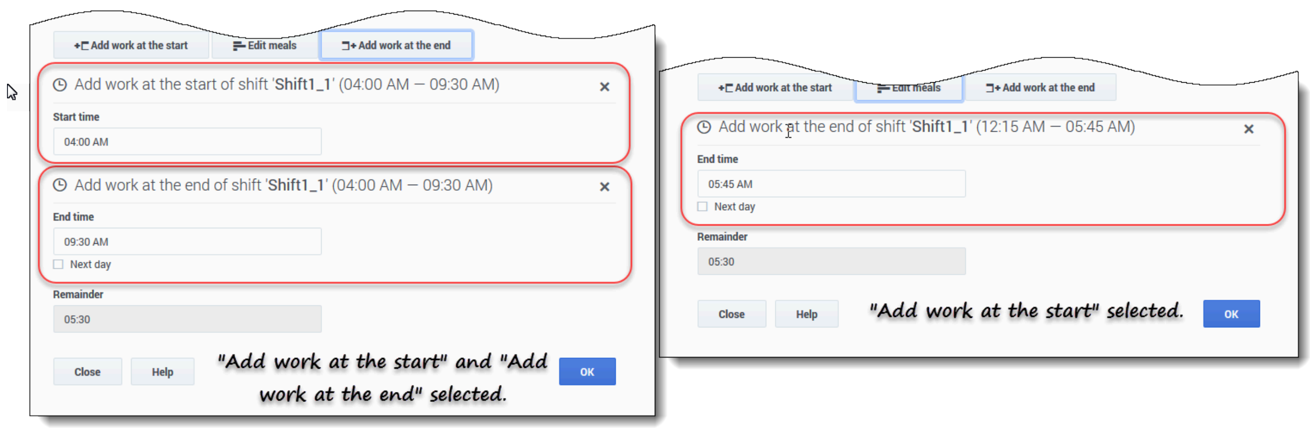


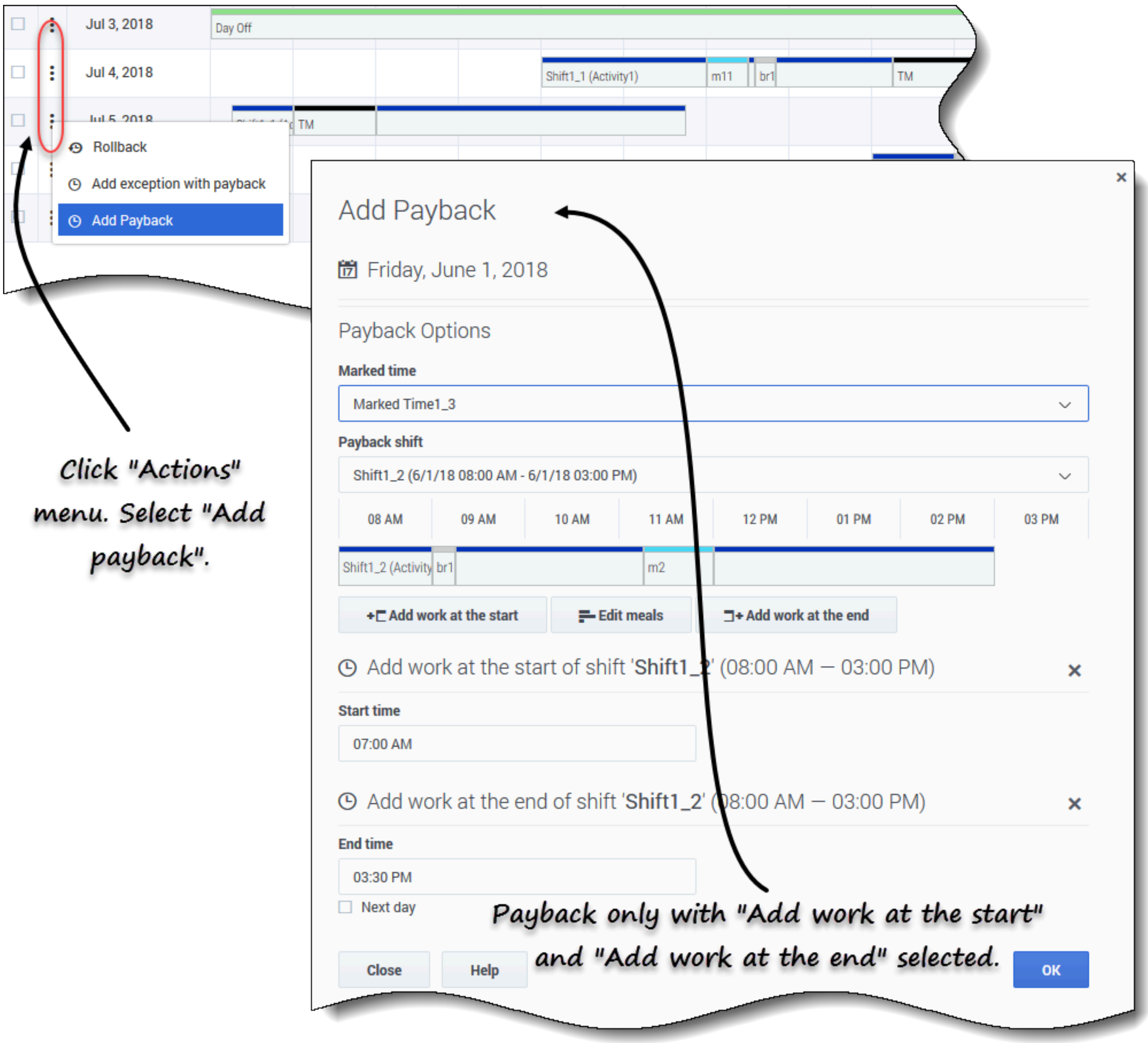
Figure: Inserting payback intervals

Inserting payback only

You can insert payback as separate requests. For example, you can enter an exception on the date that the lateness or appointment occurred and enter a separate request at a later date for the payback.

Tip

You might not have permission to add payback to your shift. If you are unable to use this feature, ask your supervisor if payback is permitted in your contact center.



To insert payback to your schedule:

1. In the row that contains the shift to which you want to add the payback, click **Actions** .
2. Select **Add payback**.
   The Add Payback dialog opens.
3. From the drop-down list, select the **Marked time** type that will be used for payback.
4. From the drop-down list, select the **Payback shift**.
   The dialog expands to show the schedule for this date.
5. Click one or more of the buttons that appear below the Schedule bar.
   For example, if you select one or more buttons, the dialog expands as shown in the figure

above.

6. Make the necessary changes to the **Start Time** and/or **End Time** fields.
7. If the end time runs into the next day, select the **Next day** check box.
8. Click **OK**.

> Tip
>
> If you click **Edit meals** when adding payback to a shift that does not allow meals to be changed, WFM displays the message: *No meals can be changed*.

Validation and error messages

WFM displays error messages if you have entered an incorrect value or made an invalid selection from a menu. In this case, WFM allows you to make the correction before entering the Exception.

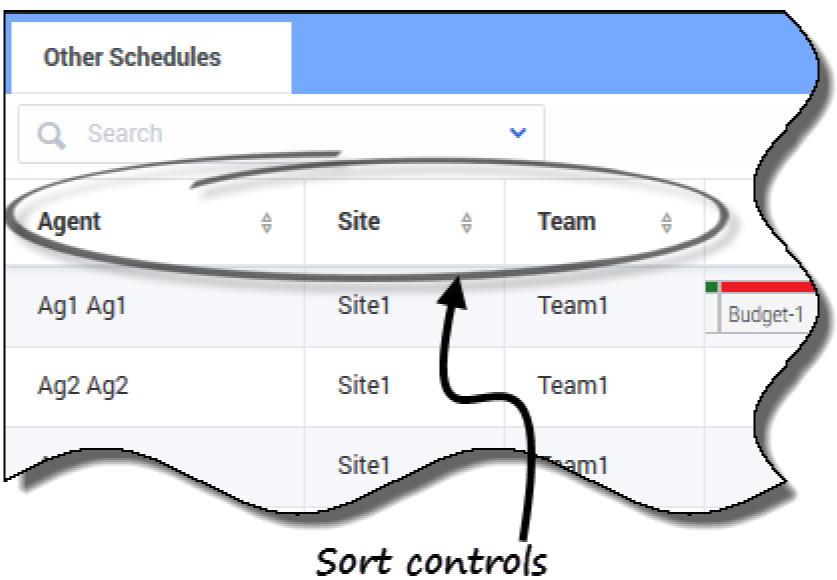
WFM displays Review Validation messages if something you have entered or selected cannot be validated. In some cases, the validation message will allow you to click **Proceed**, but the Exception is inserted with a status of **Pending**.

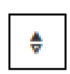
Viewing other schedules

The **Other Schedules** view displays a filterable, sortable, and searchable grid that lists other agents and their schedules. It has the following columns:

- **Agent**—Displays the name of the agent whose information appears in that row.
- **Site**—Displays the name of the agent's site.
- **Team**—Displays the name of the agent's team.
- Days of the week (one column for each)—Displays the agent's schedule information for that weekday. Click any work item in a specific agent's row to open the **Schedule Details** dialog box which contains all of the details about that particular work item.

Sorting the displayed data



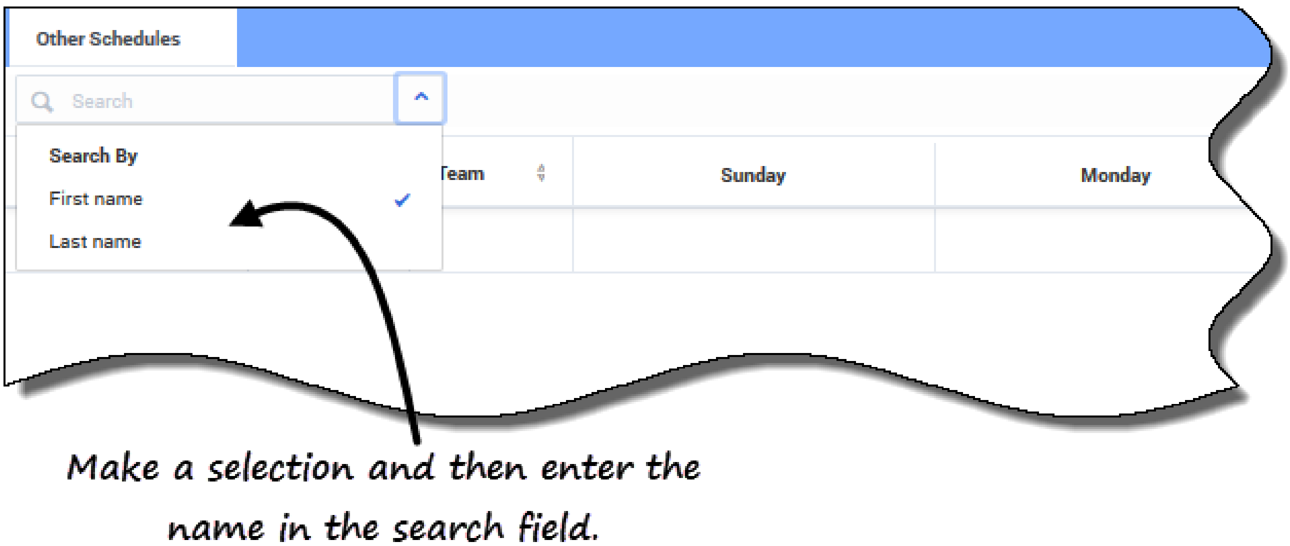
Click the **Agent**, **Site**, or **Team** column header to sort  the data in that column in ascending or descending order.

You can also use the number keys on your keyboard.

Tip

The **Site** and **Team** columns are visible only if you selected them in the **Settings** dialog in this view.

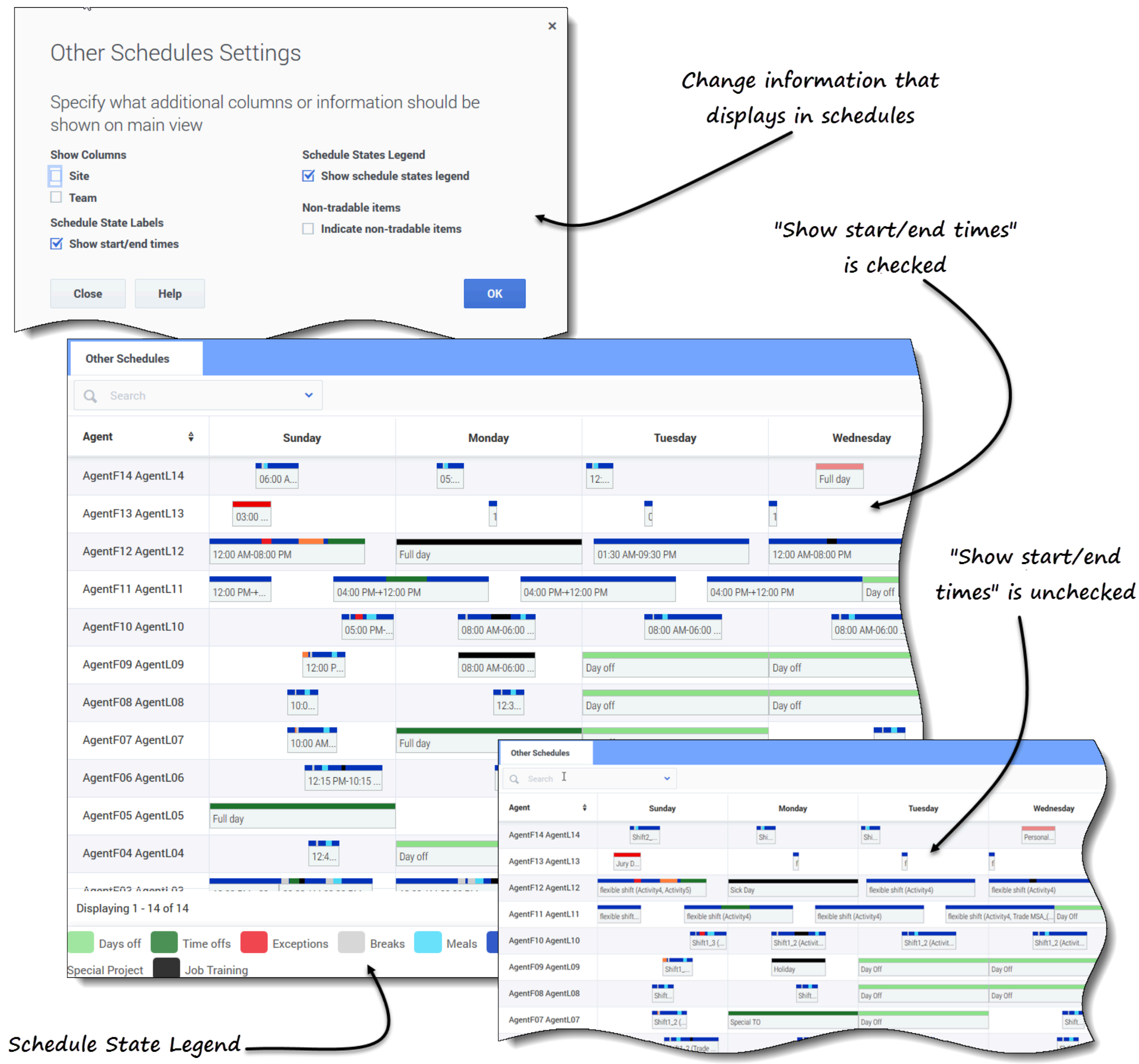
Searching for agents

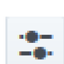


In the **Search** field, use the drop-down menu to search for agents.

- From the drop-down list, select **First name** or **Last name** and enter the agent's name in the search field.

Changing the view settings

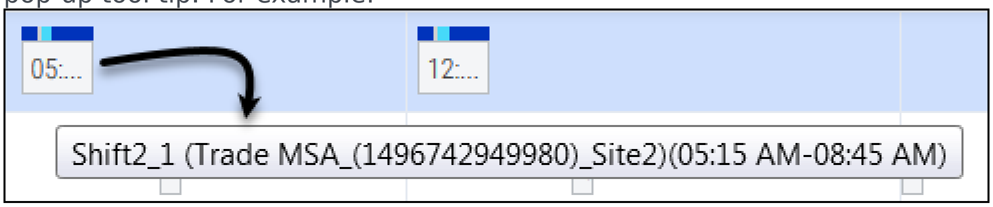


Click **Settings**  to specify what columns or other information to show in schedules. You can choose to:

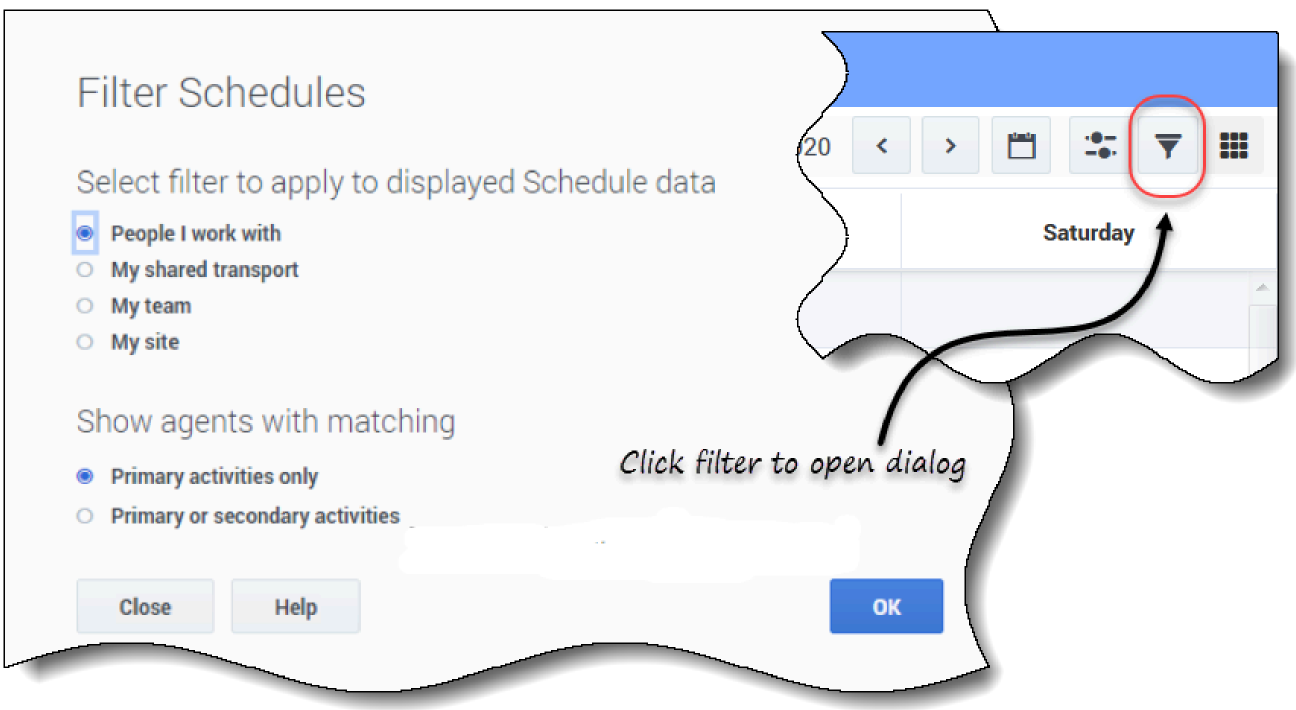
- Add the **Site** and/or **Team** columns
- Show a legend for **Schedule States**
- **Indicate non-tradable items** in schedules
- **Show start/end times** (displayed, by default) or, if you clear the check box, show item names

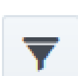
> **Tip**
> Full day items display as **Full day** when **Show start/end times** is checked. They display with start/end times if the duration is less than a full day. Day off items are displayed as **Day Off**.

Hover your cursor over truncated items in the schedule to see the information fully displayed in a pop-up tool tip. For example:



Filtering the displayed data



Click **Filter**  to open the dialog box, where you can click the corresponding radio button to limit the display to one of these choices:

- **People I work with** (the default setting)
- **My shared transport** (displayed only if the agent joined any shared transport)
- **My team**
- **My site**
- **My business unit**

Under **Show agents with matching**, select one of two settings:

- **Primary activities only** (the default setting)
- **Primary or secondary activities**

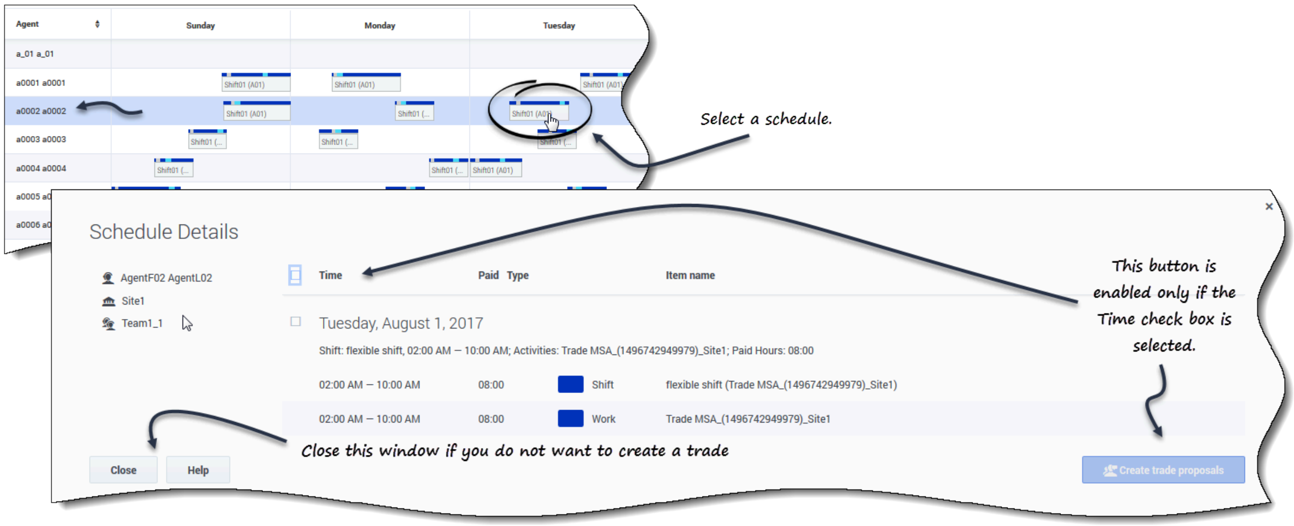
> Tip
> You will see only the filtering options made available to you by your supervisor or a site administrator. To understand the difference between the **People I work with** and **Primary activities only** filters see Creating trade proposals.

Viewing other agents' schedule details

You can view the schedule details of other agents and create trade proposals in this view. It's as easy as clicking on any weekday column in the row that contains the agent's name to whom you want to propose a trade.

> Tip
> You might not be able to create trade proposals as described in the topic below. Ask your supervisor if schedule trading is permitted in your contact center.

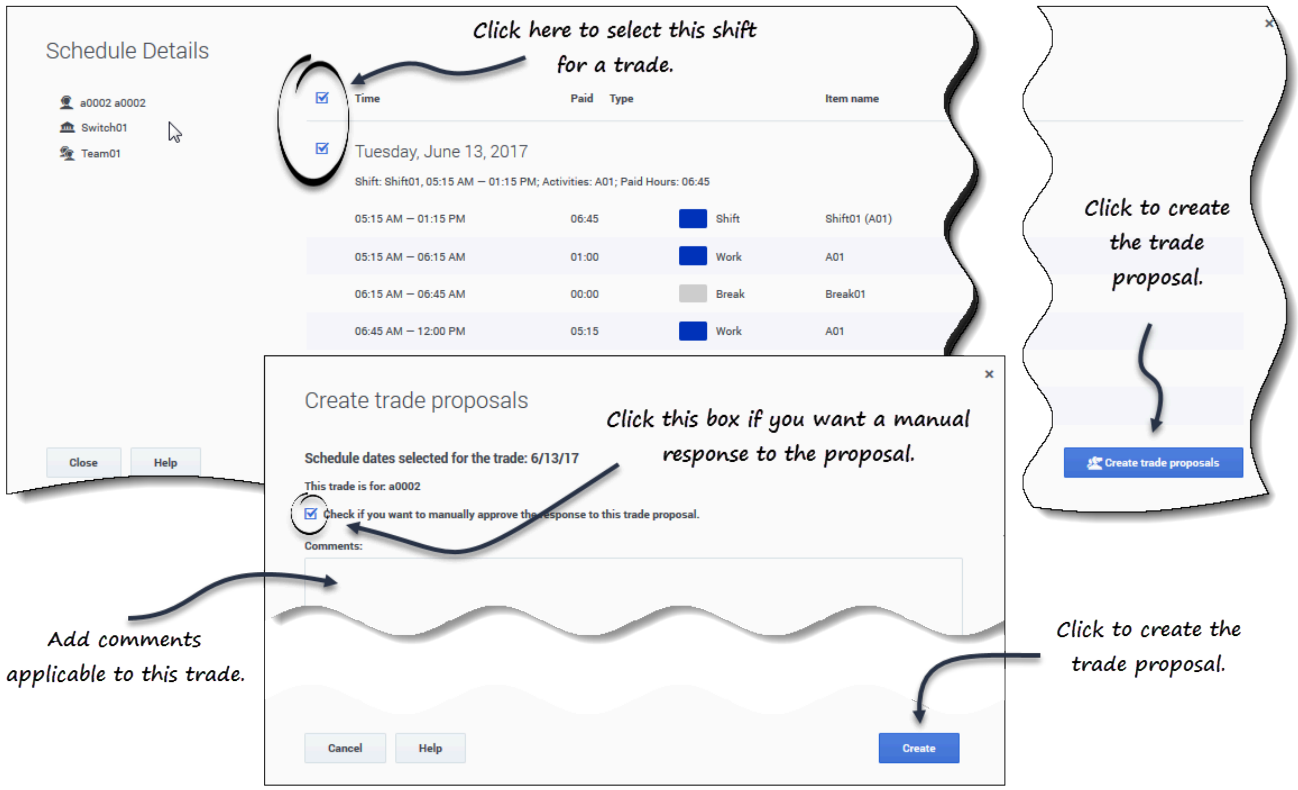
Viewing schedule details



To view other agents' schedule details:

1. In the row containing the agent's name with whom you want to trade, click the weekday.
   The selected agent's schedule details open for that day.
2. If you want to view the agent's schedule details for more than one day, click the agent's name.
   The selected agent's schedule details open for that week.
3. If the dates and times in the schedule details are suitable, create a trade proposal for this agent.
4. If you only want to view the details and are satisfied, click **Close**.

Creating the trade proposal



To create and send a trade proposal to the agent:

1. In the **Schedule Details** window, click the check box near the weekday name.
   If you select at least one check box, the Create trade proposals button is enabled. To select all days in the dialog select the top-most check box.
2. Click **Create trade proposals**.
   The Create trade proposals window opens.
   If applicable, click the Check if you want to manually approve the response to this trade proposal check box.
3. In the **Comments** field, enter any information about this trade that you want the receiving agent or your supervisor to know.
4. Click **Create**.
5. The **My Trades** view opens and the trades is added to your list of trades.

Trading

Administrators and supervisors determine the trading rules and what schedule trades are permitted in your contact center. If single-site trading is permitted, see Single-site trading for details about the views and settings you can use to create and send schedule trade proposals. If multi-site trading is permitted, see Multi-site trading.

This topic first describes the entire trading process and then breaks it down into the steps required for a successful trade.

How trading works

A trade can include up to six full weeks of schedule days. Every schedule trade requires:

- One agent's proposal for a trade. The proposal specifies which schedule days this agent wants to trade.
- Another agent's response to that proposal. The response indicates this agent's willingness to accept the proposed trade.
- An approval. The approval can be either automatic (by WFM) or explicit (by a supervisor).

For some trades, the proposing agent must explicitly accept the response before submitting the trade for approval. This is always true for community proposals, which are offered to all agents within a team, site, or business unit (if multi-site trading is permitted).

If a trade is approved, it executes: both agents' schedules change to reflect it, and the trade no longer appears in the trading views. However, all of your own proposals still appear on the My Trades view even after WFM executes the corresponding trades.

Not all trades are approved. Under certain conditions (for example, when one agent is not qualified for the other agent's scheduled activities), WFM automatically declines a trade. If either agent's schedule is changed before a pending trade's approval, WFM automatically cancels the trade. If a pending trade has not been approved before the first day involved in the trade, it expires. In each of these cases, the trade does not occur

Requirements for a successful trade

For a trade to take place, all the following steps must occur.

- One agent creates a community or personal trade proposal.
- At least one agent responds to the community proposal or the receiving agent accepts the personal proposal.
- The proposing agent accepts a response from a community or personal proposal. (This step is only

required for personal proposals if the proposing agent specified manual approval.)

- The trade receives either WFM's automatic approval or a supervisor's explicit approval.

Single-site trading

If single-site trading is permitted in your contact center, you can select one of two views in the Trading module's drop-down menu; Proposals or My Trades. You can use these views to obtain more convenient schedules by trading with other agents.

Using the Trading views, you can:

- Respond to other agents' personal or community trade proposals.
- Review or cancel your own trade proposals.
- Review or cancel your responses to other agents' proposals.
- View trade participants' schedules or schedule details.

> **Tip**
> You create schedule trade proposals in the My Schedule or My Schedule Details view.

Viewing proposals and my trades

The Trading views (Proposals and My Trades) enable you to view schedule trades and their details, accept or decline other agents' trading proposals, and cancel your proposals or responses.

You initiate or create trade proposals in the My Schedule or My Schedule Details view.

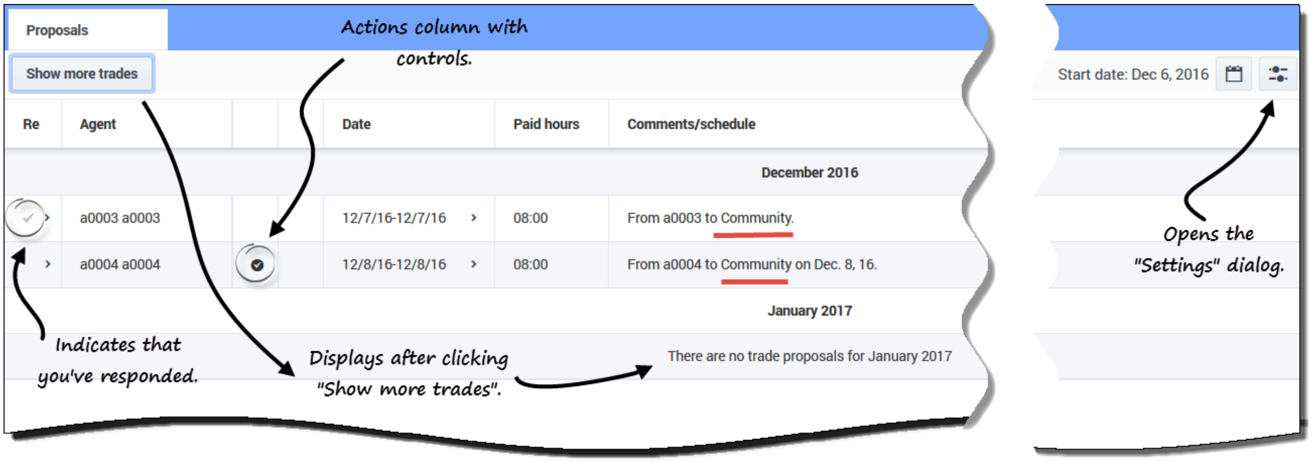
> **Tip**
> Administrators and supervisors determine whether trading is permitted in your site or contact center. They establish the trading rules that determine which schedules are eligible for trades. You might not be able to trade with agents within your site or in other sites, depending on how they have set up your site and team. If you cannot see the **Trades** view or agents from other sites in the **Trades** view, Trading or Multi-site trading might not be set up for your team.

Viewing proposals

The **Proposals** view displays all proposals whose first day falls within the selected month. It is sorted by the first date of each proposal. By default, it shows the current month, but you can change it by selecting a different start date in the calendar or by clicking Show more trades.You will use this view to accept or decline proposals.

You can distinguish between community and individual proposals by the action buttons available to you. Community proposals only have the **Accept** button, whereas individual proposals have both **Accept** and **Decline**.

Columns and controls

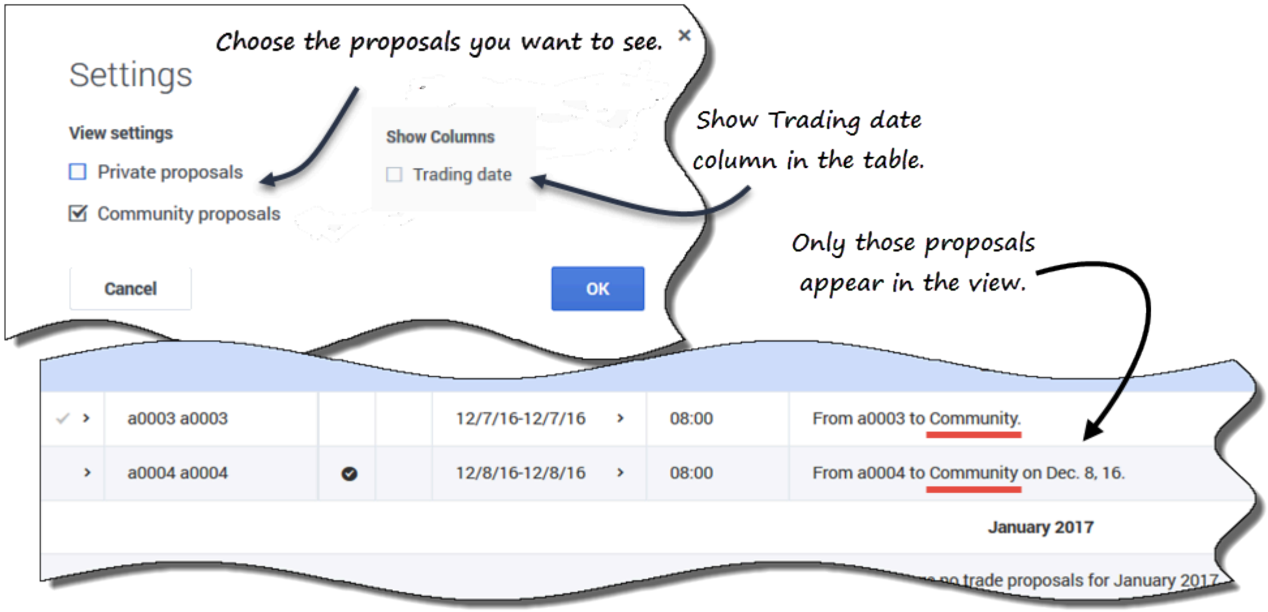


You'll find the following controls and columns in this view:

- Show more trades—When clicked, displays each concurrent month's trade proposals.
- *Date selectors*—Enables you to change the **Start date** of the displayed data. WFM will display the trade information for the month, starting on this date.
- Settings—Opens a dialog, enabling you to change the settings in this view.
- **Re**—A check mark in this column indicates that you have already responded to this trade proposal.
- **Agent**—Shows the name of the agent who is initiating the trade proposal, and your name if the arrow in **Re** column is clicked and the rows expanded.
- **Action**—This column contains buttons to accept or decline an individual proposal or accept a community proposal. To find out what actions you can take in this view, see Reviewing other agents' proposals.
- **Dates**—Shows the start and end dates involved in the trade proposal or response.
- **Paid hours**—Shows the total number of paid hours covered by the proposed trade.
- **Comments/schedule**—Shows any comments attached to the proposal.

Changing the view settings

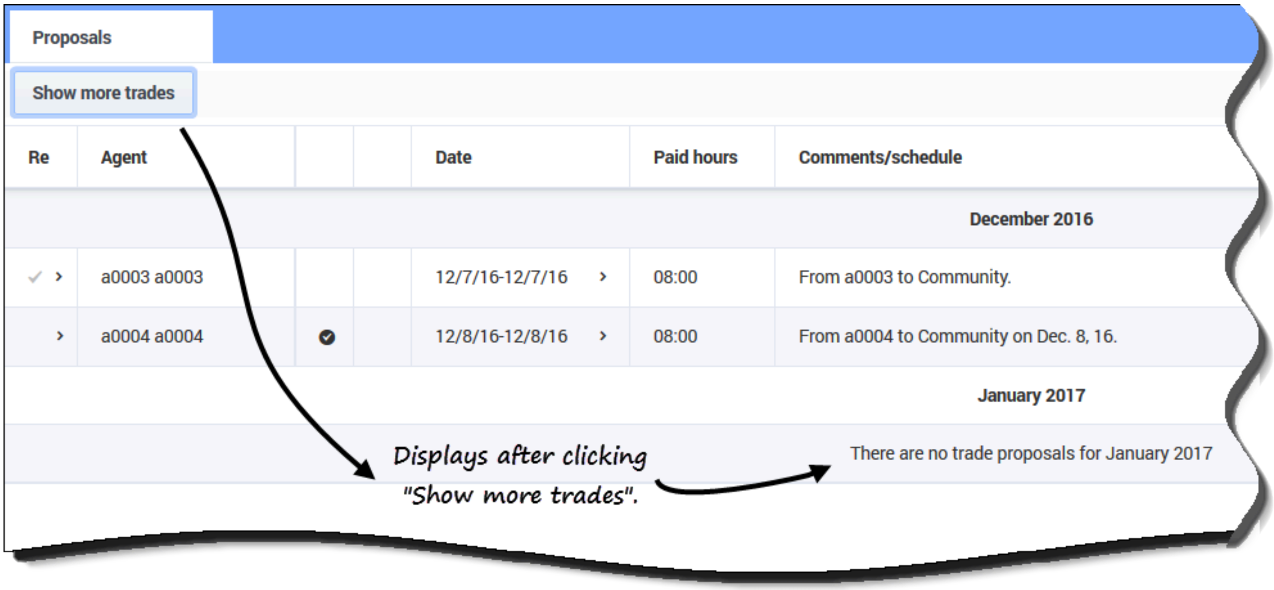
Enables you to to show only those types of proposals you want to view; private proposals, community proposals, or both.



To change the settings in this view:

1. Click **Settings**.
   The Settings dialog opens.
2. Check or clear the **Community proposals** or **Private proposals** boxes to change the information that you want to see. If neither check box is selected, no information is displayed.
3. Optionally, check the **Trading date** check box to show the **Trading date** column in the grid when the agent's timezone is set (in My Settings) to one, other than the site timezone.
4. Click **Ok** to save the changes (or **Cancel** to discard them and close the dialog).

Showing more trades



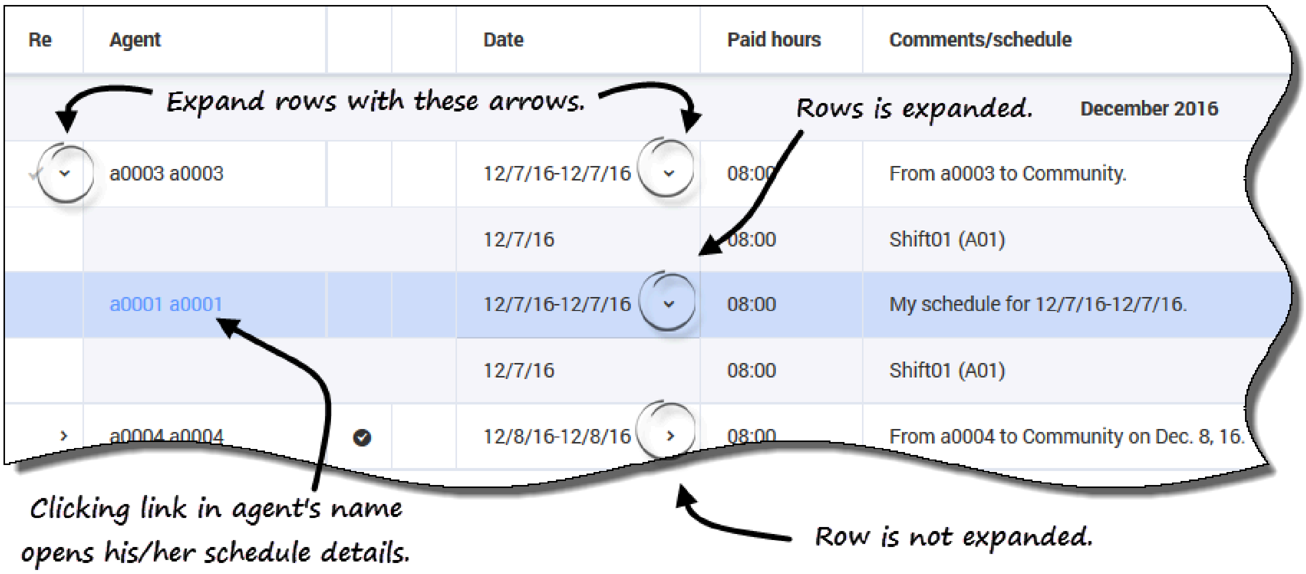
To view trades for months other than the month in the Start date:

1. Click **Show more trades**.
   The next month's trade proposals display in the grid.
2. Click this button again for as many months as you want to view.
   Each consecutive month's proposals display in the grid.

If there are no trades in a specific month, you will see the message *There are no trade proposals for <month> <year>*.

Finding details in the grid

You can expand the grid in this view to display more rows containing details about proposals, your schedule, and other agents' schedules.



For example:

- Clicking the arrow in the **Re** column adds a row containing your schedule for the date range specified in the proposal.
- In the row that shows your name, clicking the arrow in the **Date** column adds rows containing all of the shifts in your schedule for the date range specified in the proposal.
- In the row that show the proposing agent's name, clicking the arrow in the **Date** column adds rows containing all of the shifts in his/her schedule for the date range specified in the proposal.

In addition to being able to expand the rows, you can:

- Click the link in your name to open your schedule details for the date range specified in the proposal.
- Click the link in the proposing agent's name to open his/her proposal details for the same date range.

See Proposals view: Proposal and schedule details.

Viewing my trades

This view displays all of your responses in a table/grid. It has the same columns as shown in the Proposals view, with one additional column (**Status**), and the **Re** and **Actions** columns have different descriptions:

- **Re**—An envelope in this column indicates that agents have responded to this trade proposal. If you initiated the trade proposal, the response icon looks like this ; If another agent initiated the trade proposal, it looks like this .

- **Status**—This column shows the acceptance or approval status of the trading proposal or response. For a descriptions of the types of statuses, see Trade statuses.
- **Actions**—This column contains buttons to accept or decline responses from other agents, cancel your proposals, or cancel your responses to other agents' proposals. To find out what actions you can take in this view, see Reviewing responses to proposals.

This view displays proposals and responses for a month, based on the date selected in the calendar (or using the date selectors). You will use this view to accept or decline responses from other agents, and cancel your own proposals and responses.

The order of rows starts with the proposing agent's name and proposal information in the first row, then if the rows are expanded, the next row shows the responding agent's name and response information.

You can expand the rows and open agent's schedules in the same way as described in the **Proposals** view. See Finding details in the grid.

In addition to being able to expand the rows, you can:

- Click the link in your name to open your proposal or request details for the date range specified in the proposal.
- Click the link in the proposing agent's name to open his/her proposal or request details for the same date range.

See My trades view: Proposal and request details.

Managing single-site trades proposals

Use the **Trading** views (Proposals and My Trades) to review proposals and responses by performing the tasks described in this topic. Use the **Schedule** views to create trade proposals.

Reviewing other agents' proposals

Use the **Proposals** view to:

- Review trade proposals that another agent has sent specifically to you.
- Review trade proposals that other agents have sent to the community.
- Accept or decline proposals.

> **Tip**
> Depending on WFM Web's setup at your site, community proposals can be offered to all agents on your team or to all agents on all teams.

To find out how to navigate the **Proposals** view and see descriptions of its controls and columns, see Viewing proposals.

About the Proposals table

The table shows all proposals whose first day falls within the selected month, and whose status is Open (they have not expired, are not in review, and have not been accepted, confirmed, declined, or cancelled). The table is sorted by the first date of each proposal.

The proposing agent's name is in the first row of the proposal:

- Click the link in the agent's name in either row if you want to display his/her proposal details.
- Click the link in your name in either row if you want to display your schedule details.
  See Proposals view: Proposal and schedule details.

To learn how to expand the table to see additional rows, see Finding details in the grid.

Accepting or declining a proposal

To accept or decline a proposal in the Proposals view:

1. Click **Accept** or **Decline** in **Actions** column for the proposal you want to accept/decline. **The Comments dialog box opens.**
2. Enter comments, if you wish, and then click **OK**.

   A check mark appears in the Re column for this proposal, indicating that you've

accepted, or the proposal is removed from the list of proposals, because you've declined.

Reviewing responses to proposals

Use the **My Trades** view to:

- Review trade proposals that you have sent to the community or an individual, along with their status and any responses.
- Review your responses to other agents' schedule trade proposals or community proposals.
- Review the status of proposals to which you have responded.
- Cancel a pending response, if you change your mind.
- Cancel your own pending trade proposal, if you change your mind.

The window includes standard date selectors and a table of proposals and responses, whose general controls are described in Viewing my trades.

About the Trades table

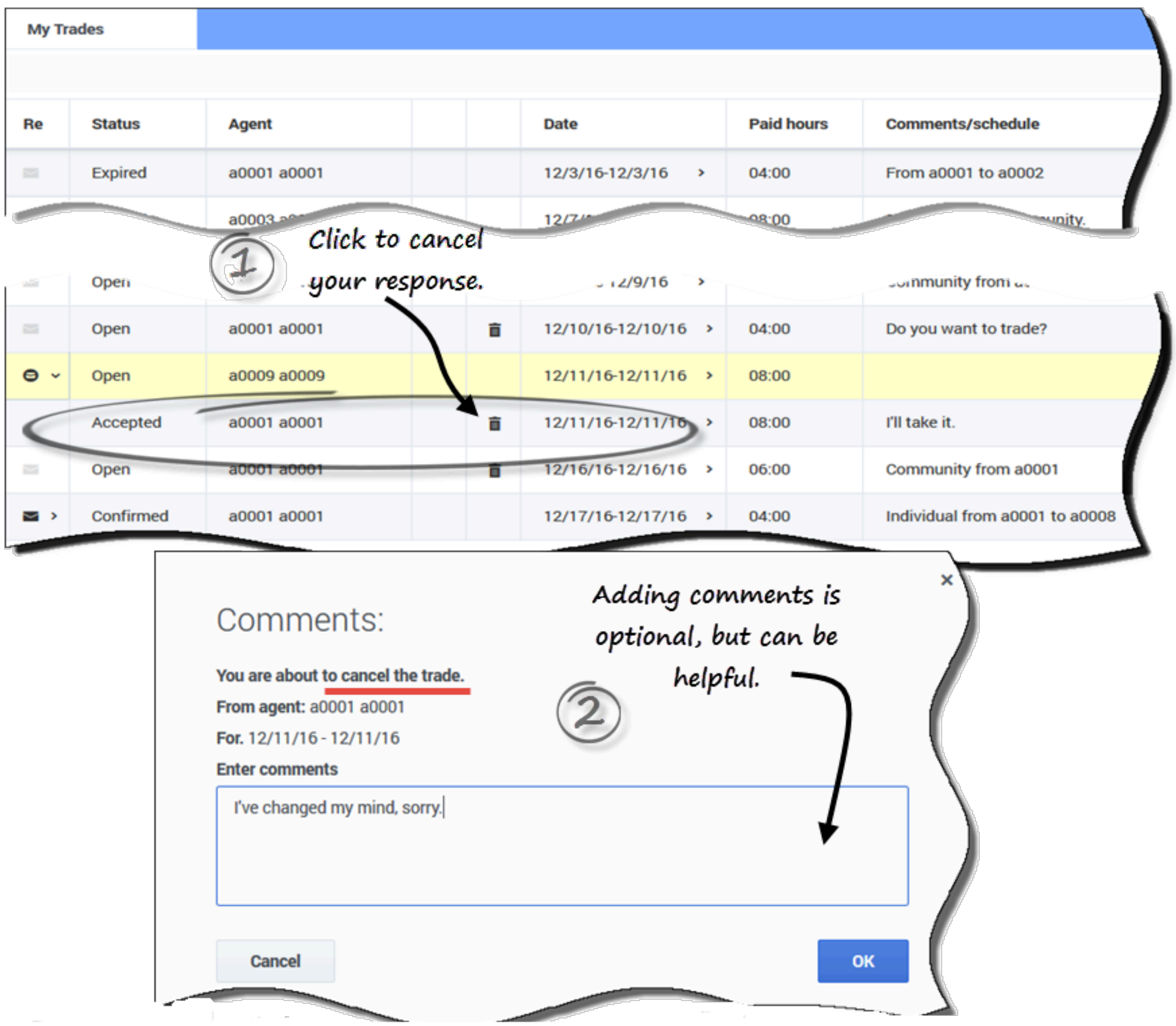
The table shows all of your trades and responses to proposals whose first date is within the selected month. It is sorted by the first date of each trade.

For each trade, the **Agent name** column shows the agent who posted each original proposal:

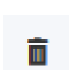
- Click the link in the agent's name in either row if you want to display his/her proposal or request details.
- Click the link in your name in either row if you want to display your proposal or request details.

See My trades view: Proposal and request details.

Canceling a pending response



To cancel a pending response in the My Trades view:

1. Click **Cancel**  in **Actions** column for the trade response you want to cancel.
   The Comments dialog box opens.
2. Enter comments, if you wish, and then click **OK**.

Viewing and changing trade statuses

The **Status** column in the **My Trades** view shows the current status of each trade proposal or response. Each proposal and response status determines the actions that you can take in the **Actions** column:

Status	What it means	Actions you can take
Open	The proposal has been offered to a specific agent or to the community, and has not yet passed into one of the other statuses listed in this table.	Click **Cancel** if you want to cancel an open proposal.
Accepted	You have accepted this personal proposal or responded to this community proposal. Your response is now awaiting the proposing agent's decision.	Click **Cancel** if you want to cancel your response.
	Another agent has accepted your personal proposal or responded to your community proposal.	Click **Accept** on a response row to submit this trade (with this response) for approval. Click **Decline** if you choose not to trade with this respondent.
In Review	You accepted this proposal and, if required, the proposing agent approved your response. But the trade could not be auto-approved. It is awaiting a supervisor's approval.	Click **Cancel** if you want to cancel your response.
	Another agent has accepted your proposal and, if required, you have approved the response. But the trade could not be auto-approved. It is now awaiting a supervisor's approval.	Click **Cancel** if you want to cancel your original proposal. This will also cancel the response.

See also, More trade statuses. For further details about requirements for a trade's approval, see the Trading overview.

More trade statuses

The statuses described in this table do not require any action on your part, but you will see them when you are reviewing proposals and trades.

- **Confirmed**—Both you and the other agent accepted the proposal, and the trade received either automatic or supervisor approval. Your trade has executed.
- **Declined**—The proposal/response was declined by either the proposing agent/responding agent (in the case of a personal proposal), by a supervisor, or by WFM. The trade will not take place.

- **Cancelled**—Either you explicitly cancelled your proposal/response, the other agent cancelled the original proposal, or WFM automatically cancelled the pending trade (because of changes to your schedule or the responding agent's schedule). The trade will not take place.
- **Expired**—The proposal did not receive approval by the day before its first included day. The trade will not take place.

Viewing proposal and trade details

In addition to being able to expand the grid in the **Proposals** and **My Trades** views to see schedules, you can view the details of other agents proposals and trades as well as your own. Clicking an agents' name or your own will open the details in a separate window.

What's in the details?

Proposal, Request, and Schedule details (yours or other agents') open in separate windows, but they have similar characteristics, including: the agent's name, the date of the trade proposal, and a break down of all scheduled items, such as the start/end times, paid hours, type, and item name, as well as comments, scheduled activities, meals, breaks, and total paid hours.

Proposals view: Proposal and schedule details

You'll see different presentations of the schedule details in this view, depending on the proposal type and which agents' name you click.

Proposal details opens when:

- You clink the link in an agent’s name:
    - If it is an individual proposal that you have not answered, you can decline, close, or respond to the proposal.
    - If it is a community proposal that you have not answered, you can close or respond to the proposal.
    - If it is a proposal that you have answered, you can only close the proposal details.

My schedule opens when:

- You click the link in your name:
    - You can only close the schedule details.

My trades view: Proposal and request details

You will see different presentations of the schedule details in this view, depending on which agents' name you click and the trade status.

Proposal details opens when:

1. An agent initiates a proposal and you clink the link in his/her name:
    - You can only close the proposal details.
2. You initiated a proposal and you clink the link in your name:
    - If the status is **Open** or **In Review**, you can delete the proposal or close the proposal details.
    - If the status is **Canceled**, **Declined**, or **Expired**, you can only close the proposal details.

Request details opens when:

1. An agent responds to your proposal and you click the link in his/her name:
    - If the status is **Accepted**, you can decline, close the request details, or respond to the proposal.
    - If the status is **In Review**, you can only close the request details.
2. You respond to a proposal initiated by an agent and you click your name:
    - If the status is **Accepted** or **In Review**, you can delete your response or close the request details.
    - If the status is **Canceled**, you can only close the request details.

Other agents' proposal details

Click the link in the proposing agent's name to open **Proposal details**. Examining other agents' schedule details can help you identify agents with whom you want to trade schedules.

Tip

Your supervisor determines whether you can view proposals within your own team only or across all teams at your site.

Your proposal and schedule details


My schedule
Your schedule opened in the Proposals view.
Agent: a0001 a0001
Schedule details
Time Paid Type Item Name
Saturday, December 10, 2016
Shift: Shift01, 08:15 AM — 01:30 PM; Activities: A01; Paid Hours: 04:00
Scheduled items are broken down in time intervals per item.
08:15 AM — 01:30 PM 04:00 Shift Shift01 (A01)
08:15 AM — 08:30 AM 00:15 Work A01
08:30 AM — 09:00 AM 00:00 Break Break01
09:00 AM — 09:45 AM 00:00 Meal Meal01
09:45 AM — 01:30 PM 03:45 Work A01
You cannot delete your schedule, only close the window.
Close
Proposal details
Agent: a0001 a0001
Proposal schedule
Your schedule opened in the My Trades view.
Time Paid Type Item Name
Saturday, December 10, 2016
Shift: Shift01, 08:15 AM — 01:30 PM; Activities: A01; Paid Hours: 04:00
Scheduled items are broken down in time intervals per item.
08:15 AM — 01:30 PM 04:00 Shift Shift01 (A01)
08:15 AM — 08:30 AM 00:15 Work A01
08:30 AM — 09:00 AM 00:00 Break Break01
09:00 AM — 09:45 AM 00:00 Meal Meal01
09:45 AM — 01:30 PM 03:45 Work A01
Comments
You can delete your own proposals.
Delete
Close

Click your name in the **Proposals** view to open **My schedule details**. If you are reviewing your trades in the **My Trades** view, in the proposal you made, click your name to open **Proposal** details.

Examining the details of your own schedule enables you to compare shifts and make a decision about whether or not to accept a proposal.

In the **Proposal details** window, there's an option to delete your proposal, but you cannot delete proposals offered by others.

Multi-site trading

If multi-site trading is permitted in your contact center, you can use the **Trades** view in the **Trading** module to obtain more convenient schedules by trading with other agents. You can filter the view to show: My Trades, Offered to me, or Community proposals.

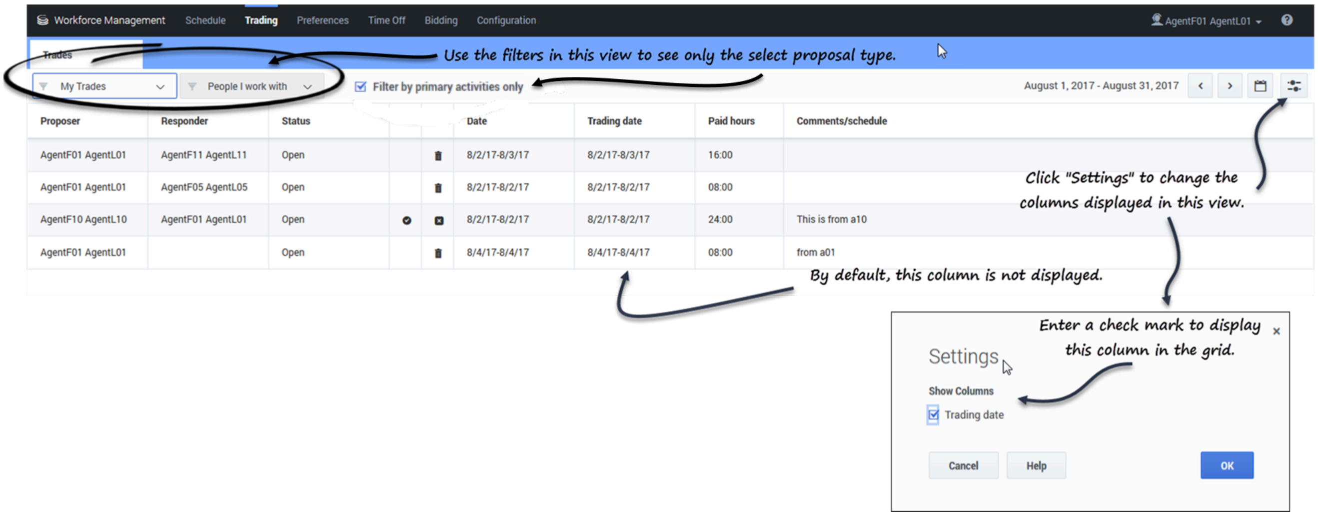
> ### Tip
> You might or might not be able to trade with agents in other sites, depending on how your administrator or supervisor has set up your site and team. If you cannot see agents from other sites in your **Trades** view, multi-site trading might not be set up for your team. In that case, see Viewing proposals and my trades.

Using the **Trades** view, you can:

- Respond to other agents' personal or community trade proposals.
- Review or cancel your own trade proposals.
- Review or cancel your responses to other agents' proposals.
- View trade participants' schedule and proposal details.

> ### Tip
> You create schedule trade proposals in the My Schedule, My Schedule Details, or Other Schedules view.

Columns and controls



The **Trades** view has the following controls and settings:

- **Filters**—There are two. Use the first filter to view only **My Trades**, **Offered to me**, or **Community** proposals. Use the second one only for **Community** proposals (it's disabled if you select **My Trades** or **Offered to me** in the first filter). Filter by:
  - **People I work with** (selected by default)
  - **My shared transport**
  - **My team**
  - **My site**
  - **My business unit**
  - **Filter by primary activities only** (selected by default).

> **Tip**
> To understand the difference between the **People I work with** and **Primary activities only** filters see Creating trade proposals.

- Date selectors—Use the forward and backward arrows to change the date by month, or click the **Calendar** icon and choose the month.
- **Settings**—Click this icon to change the display settings. In this dialog, selecting the check box displays the **Trading date** column in the grid. This is useful when your timezone (in My Settings) is different from the site timezone.

The **Trades** view has the following columns:

- **Proposer**—The name of the agent who sent the trade proposal.

- **Responder**—The name of the agent who responded to the trade proposal.
- **Status**—The status of the trade proposal. For example, **Open**, **Accepted**, **In Review**, **Confirmed**, **Declined**, **Cancelled**, or **Expired**. For a description of each status, see Trade statuses.
- **Date**—The date on which the trade proposal was created, in the time zone set in **Time zone** drop-down list in the **My Settings** view.
- **Trading date**—The date of the schedule trade in the site time zone.
- **Paid hours**—The total number of paid hours covered by the proposed trade.
- **Comments/schedule**—Any comments entered by the proposing agent, supervisors, or those auto-generated by WFM that relate to this trade proposal or schedule.

Tip

The **Trading date** might differ from date that you see in WFM Web, if the time zone in **My Settings** is set to anything other than the site time zone. To see the **Trading date** column in the grid, you must select the check box in Settings. By default, it is not displayed.

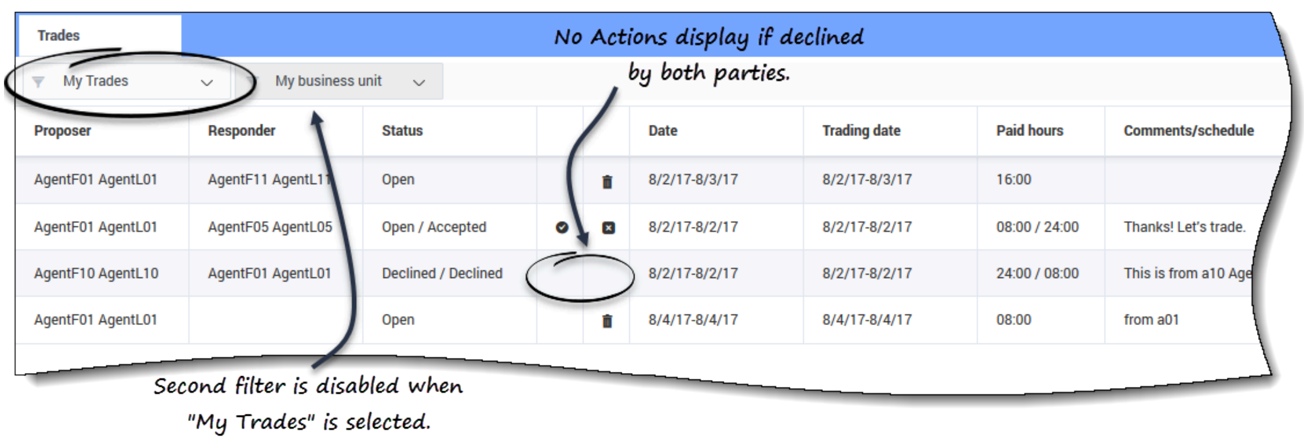
Managing multi-site trade proposals

WFM enables you to filter trade proposals in the **Trades** view by My Trades, Offered to me, or Community proposals. WFM displays all proposals whose date range falls within the selected month. By default, it shows the current month, but you can change it by selecting a different month in the calendar.

This topic describes how to use the filter to change how proposals are displayed so you can complete various tasks and find detailed information about trading agents, proposals, and schedules quickly and easily.

Managing trade proposals sent by you

Click the filter drop-down menu and select **My Trades**.



WFM displays the trade proposals that you created, and proposals from other agents that you answered (offered only to you and offered to the community).

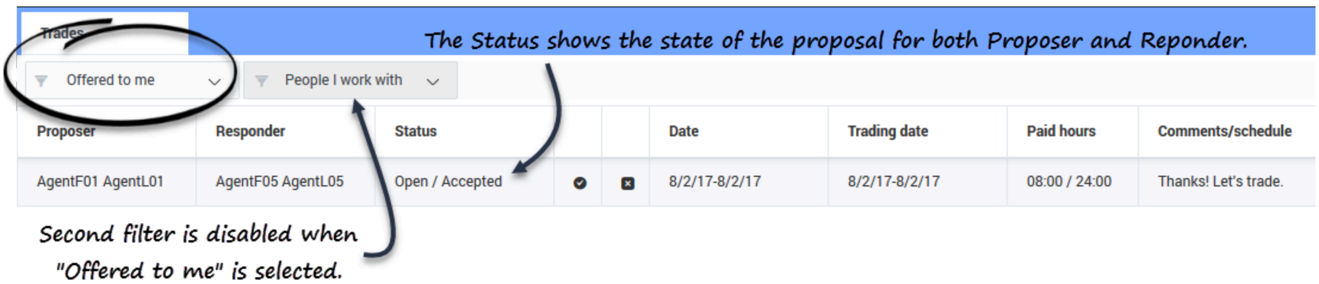
You can view your proposals and their details, accept or decline other agents' trade proposals, and cancel your proposals or responses.

The **Status** column in this view shows the state of each trade for each participant—the **Proposer** and the **Responder**—in this format: **Open / Accepted**.

Click the anywhere in a selected row to open the Proposal Details.

Managing trade proposals offered to you

Click the filter drop-down menu and select **Offered to me**.



WFM displays the trade proposal that were offered to you and personal trade proposals created by you that require your confirmation.

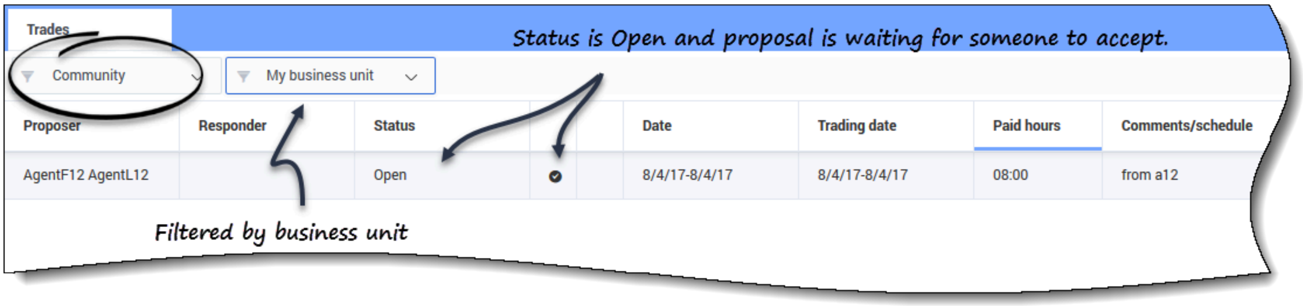
You can view these proposals and their details, accept, or decline them.

After you accept or decline a proposal, this trade is removed from the **Offered to me** proposals, but remains in the **My Trades** list of proposals.

> **Tip**
> You can distinguish between community and individual proposals by the action icons available to you. Community proposals only have the **Accept** icon, whereas individual proposals have both **Accept** and **Decline**.

Managing trade proposals sent to the community

Click the filter drop-down menu and select **Community**.



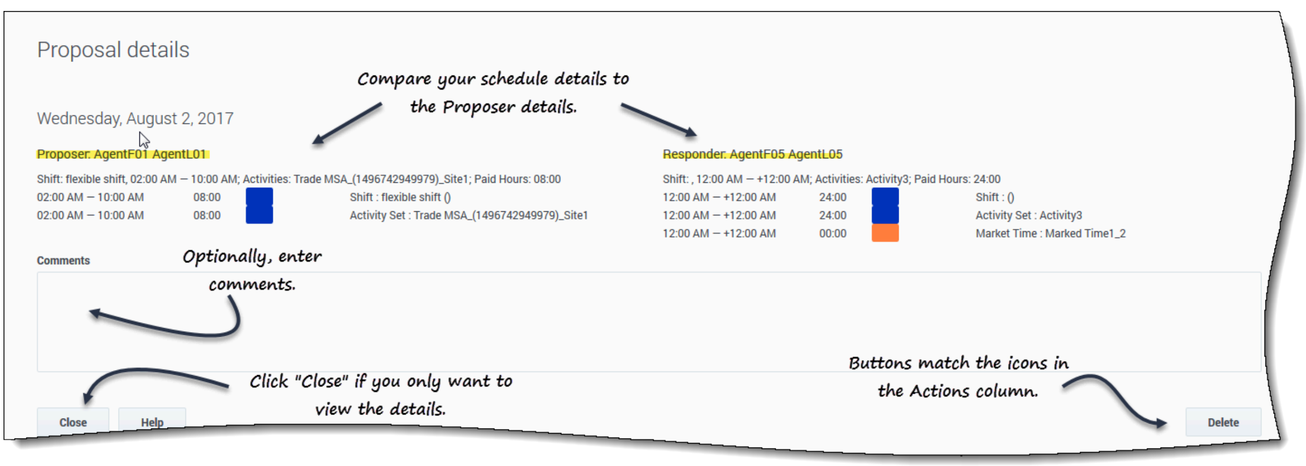
WFM displays only the trade proposal that were sent by other agents to the community.

You can view these proposals and their details, and accept them.

After you accept a proposal, this trade is removed from the **Community** proposals, but remains in the **My Trades** list of proposals.

Viewing proposal details

You might want to view the details for schedule trade proposal before taking any action. To do so, click anywhere in the row containing the proposal.

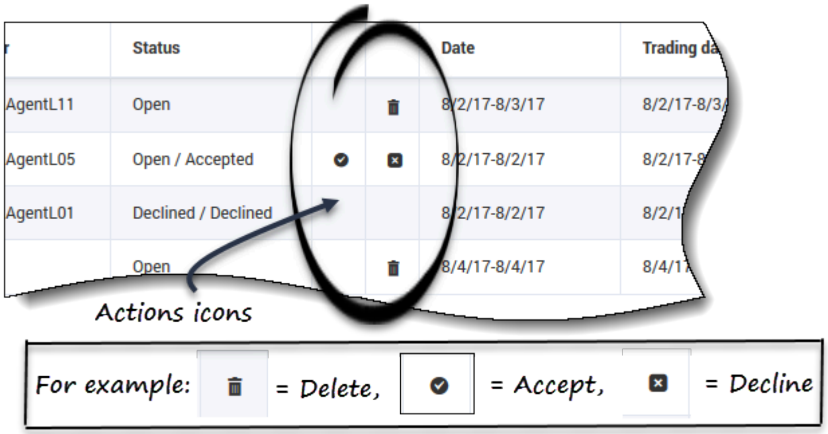


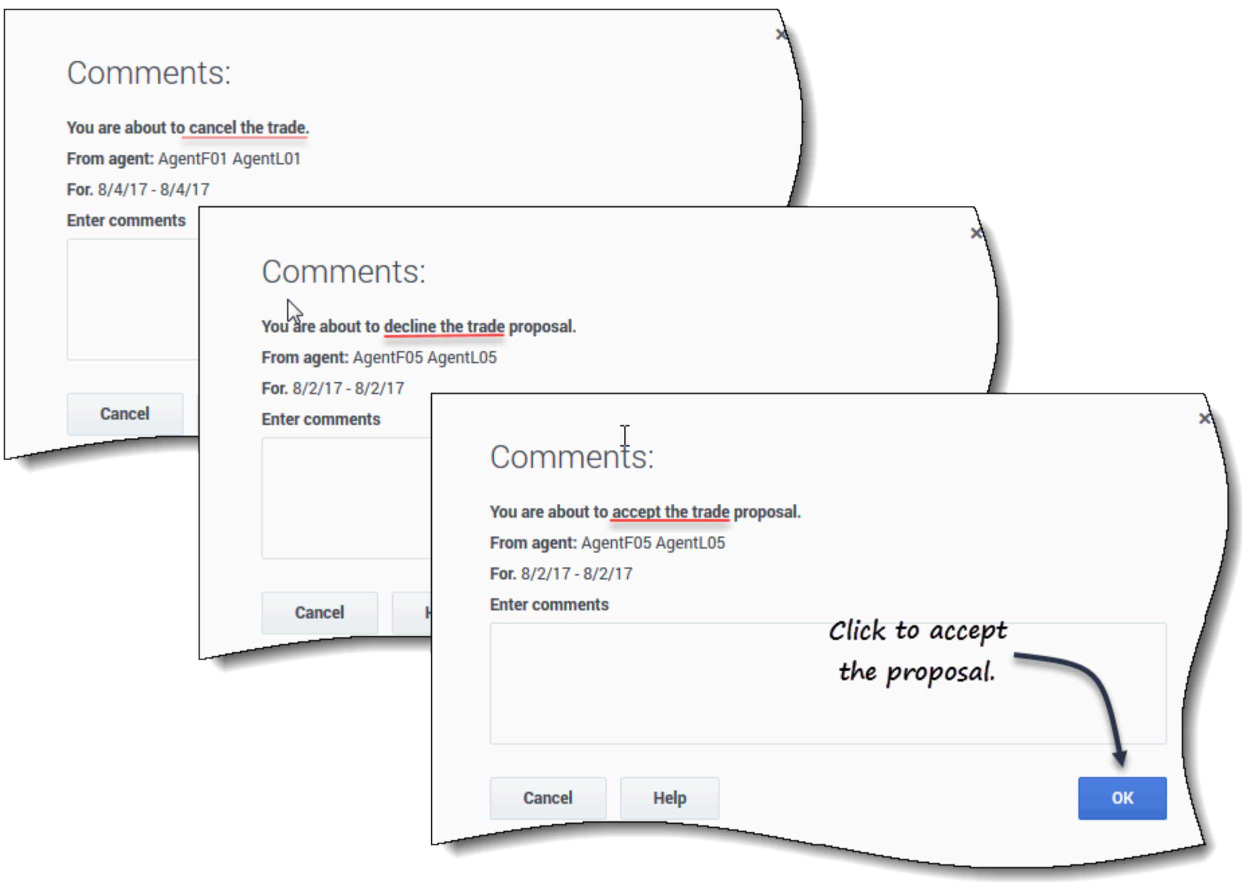
The **Proposal Details** dialog opens, containing the following information:

- The date of the proposed trade
- The name of the proposing agent
- The name of the responding agent (if an agent has responded)

- The schedule details, including: shift, activities, paid hours, marked time, and duration
- A **Comments** field
- **Action**, **Close**, and **Help** buttons

Responding to trade proposals





You can respond to trade proposals in one of two ways:

1. In any of the three filtered **Trades** views, click the **Action** icon in the table that matches your choice.
   The Comments dialog opens, enabling you to add comments and respond.
2. When the **Proposal Details** dialog is open, click the **Action** button in the bottom-right corner. (See Viewing proposal details

Preferences

Workforce Management (WFM) *preferences* enable you to set preferences for your availability, shifts, and days off. Entering any one of these types of preferences lets your supervisor know when you prefer to work and what days to prefer to have off. Supervisors can then take your preferences into consideration when building schedules.

Availability preferences and patterns

Availability preferences and *availability patterns* are similar, in that you can use either one to let your supervisor know when you are available for work. However, adding availability preferences is usually a *one-of* entry. Meaning it's only applicable once, for the dates you specify. You can add more than one availability in a preference, but it doesn't establish a pattern for a specific time period. For that, you will use availability patterns.

Use availability patterns to easily set your preferences when they are the same for multiple weeks, or set weekly patterns that you can reuse at any time. For example, you might want to create an availability pattern to let your supervisor know that you are available (and prefer) to work between the hours of 7:30 am and 9:30 am on Tues, Wednesday, and Thursdays for the next three weeks. Unless you create a pattern, you will have to enter your availability for each week separately (even though your availability is the same for all three weeks).

Click **Preferences** in the Menu bar and select one of three views from the drop-down menu: Calendar, Details, or Availability Patterns. Use these views to:

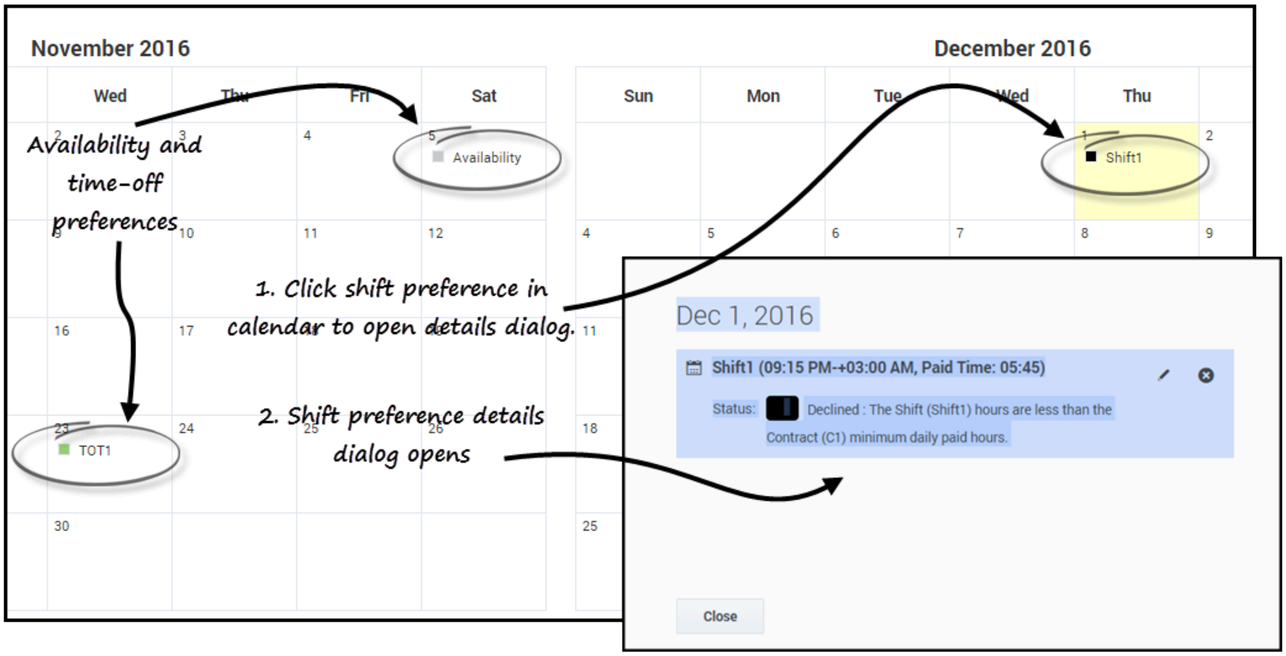
- View your preferences for shifts, availability, and days off.
- View your shifts, time off, and rotating patterns.
- Add, edit, or delete your preferences for shifts, your availability or days off.
- Create Availability Patterns.
- Create preferences, by using Availability Patterns.
- Enter comments associated with your preferences.

> **Important**
> You cannot edit or delete exceptions, time off, working hours, or granted preferences. If you need to change an exception or a granted preference, contact your supervisor.

Viewing preferences in the calendar

In the **Calendar** view, each item is marked with color representing its type and status.

To display the Statuses color-coded legend at the top of the page, see Changing the settings in the Calendar view.

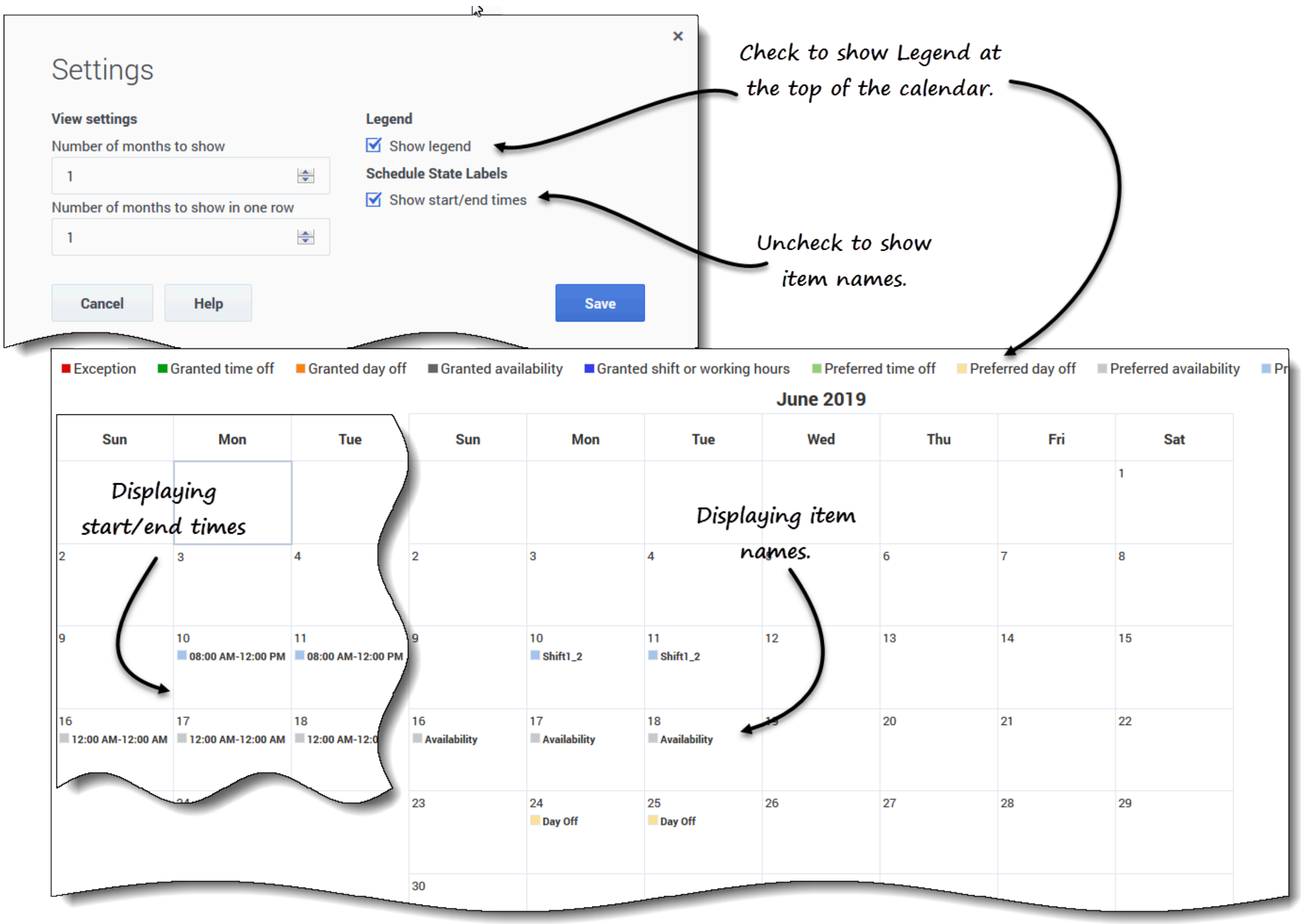


Click any preference in the calendar to open the **Details** dialog. Note that you can edit or delete preferences that are in **Preferred** or **Declined** status (but only if WFM declined the Preferred preference during insertion).

> ## Tip
> You might see start/end times in the calendar instead of item names like **Shift**, **Availability**, or **TOT1**. See Changing the view settings.

Changing the view settings

You can change the way you view information in the **Calendar** view by changing the settings to display only the current month (default) or multiple consecutive months, or display a legend that describes the color-coded statuses.



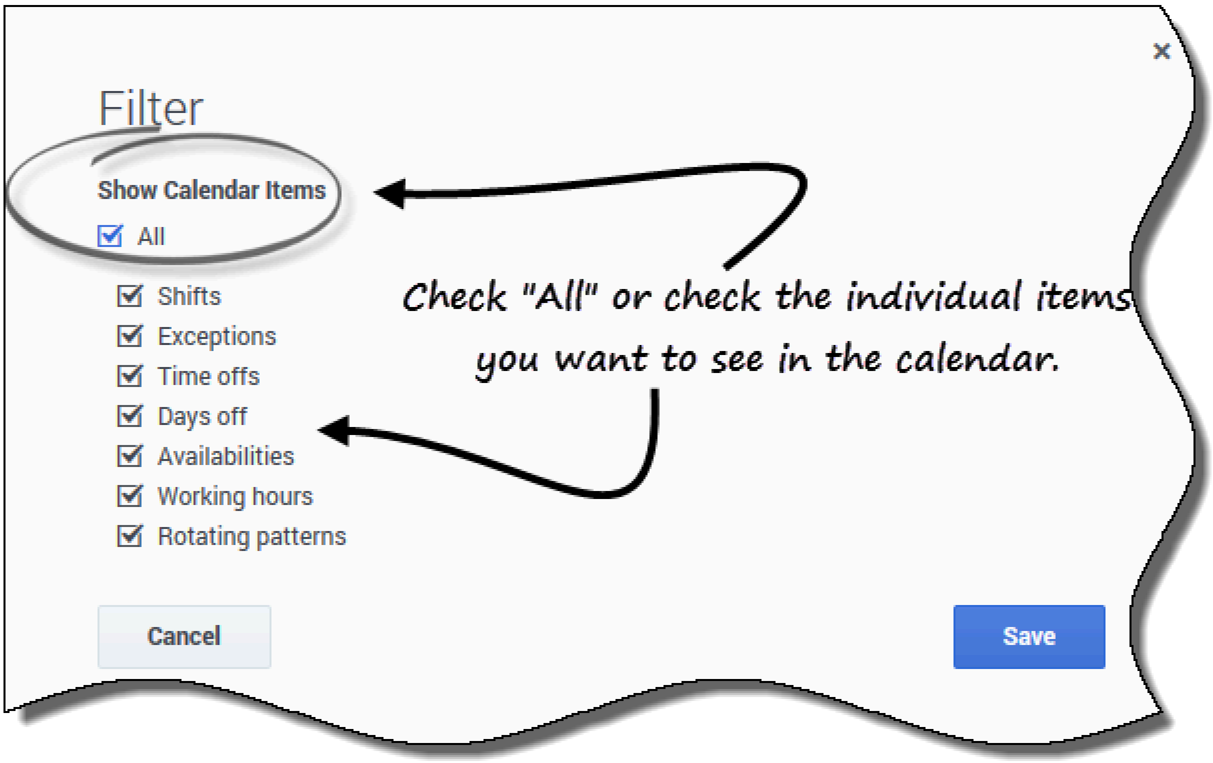
To change the settings in this view:

1. In the upper-right corner, click **Settings**.
   The Settings dialog box opens.
2. To change the number of months and how they are displayed, enter a number in these two fields or use the up or down arrows:
   - **Number of months to show**
   - **Number of months to show in one row**
3. To display the statuses legend above the calendar, enter a check mark in the **Show Legend** check box.
   By default, Show start/end times is checked, displaying start/end times in the calendar.
4. To see item names in the calendar (instead of start/end times), clear the **Show start/end times** check box.
5. **Save** the settings (or discard them by clicking **Cancel**).

Tip

Full day items display as **Full day** when **Show start/end times** is checked. They display with start/end times if the duration is less than a full day. Day off items are displayed as **Day Off**.

Filtering the displayed data



You can filter the data displayed in the **Calendar** view to show only those calendar items that you want to see.

To filter the displayed data in these views:

1. In the upper-right corner, click **Filter**.
   The Filter dialog box opens.
2. Enter a check mark in the **All** check box or check only those boxes for the items you want to see.
3. **Save** the settings (or discard them by clicking **Cancel**).

Preference statuses and hierarchy

Before scheduling, a preference can be Granted, Declined, or Preferred. After a schedule is built for the dates that include this preference, the status can be Scheduled (appears in the schedule) or Not Scheduled (does not appear in the schedule).

- A **Granted** preference appears in the schedule, unless it is first removed or unless another preference is added that out-ranks the first one. If this happens, the status of the lower-ranking preference changes to Declined.
- **Declined** preference does not appear in the schedule unless it is declined in favor of a higher-ranking preference and the higher-ranking preference is later removed before the schedule is built. If this happens the preference goes back to its original status, which can be Granted or Preferred.
- A **Preferred** preference appears in the schedule if it complies with the scheduling constraints and optimization settings that are configured for your site.

> **Tip**
>
> If you do not see **Preferences** in the menu bar, then schedule preferences are not enabled for your contact center.

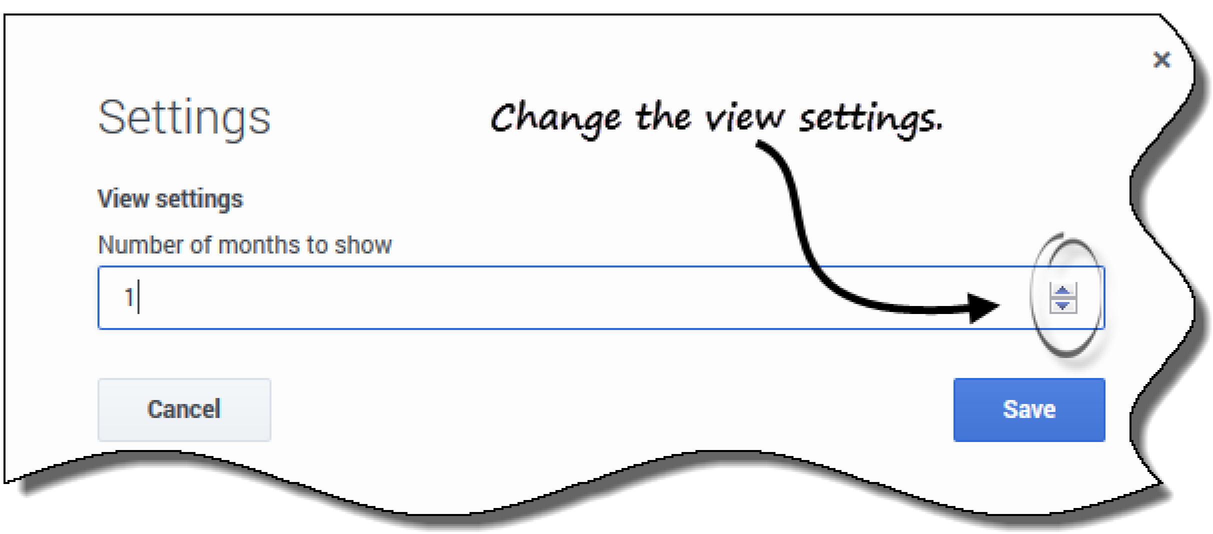
Viewing preference details

Select the **Details** view to see your preference details in a table with the following columns:

- **Date**—The date of the preference.
- **Preference**—The name of the preference.
- **Start time**—The time when the preference is requested to begin. For a Day Off, this column is empty.
- **End time**—The time when the preference is requested to end. For a Day Off, this column displays "Full Day".
- **Paid hours**—The number of paid hours in the preference.
- **Status/reason**—The preference status, whether it is Preferred, Granted, Declined, Scheduled, or Not Scheduled, and the reason why WFM assigned a status such as, Declined or Not Scheduled to a time-off item. See Preference statuses and hierarchy for an explanation of these statuses.
- **Comments/memo**—Comments or memo containing information related to the preference.

Changing the view settings

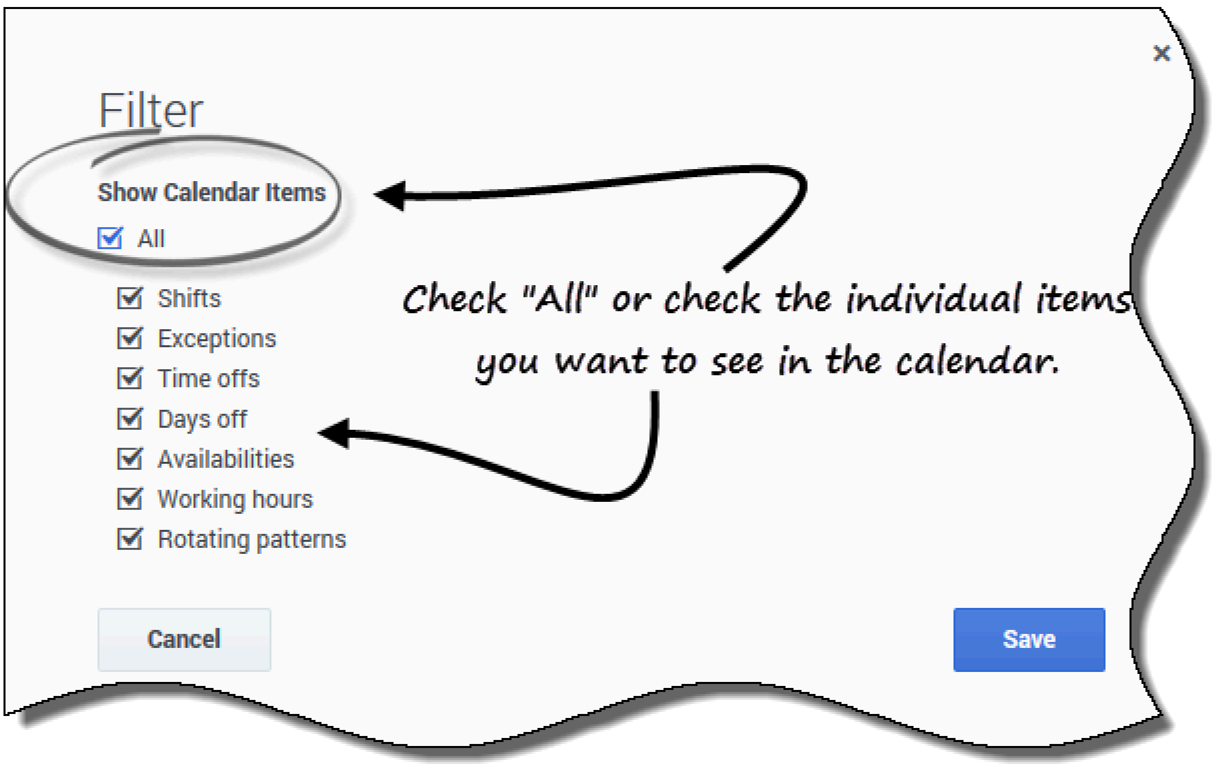
You can change the settings in the **Details** view to display only the current month (default) or multiple consecutive months.



To change the settings in this view:

1. In the upper-right corner, click **Settings**.
   The Settings dialog box opens.
2. Enter a number in the **Number of months to show** field, or use the up or down arrows to change the number of months that display in this view.
3. **Save** the settings (or discard them by clicking **Cancel**).

Filtering the displayed data



You can filter the data displayed in the **Details** view to show only those calendar items that you want to see.

To filter the displayed data in these views:

1. In the upper-right corner, click **Filter**.
   The Filter dialog box opens.
2. Enter a check mark in the **All** check box or check only those boxes for the items you want to see.
3. **Save** the settings (or discard them by clicking **Cancel**).

Managing your preferences

Use either one of the **Preferences** views (Calendar or Details) to add or edit your shift, availability, or day-off preferences.

Adding shift preferences

Link to video

To add your shift preferences:

1. Click **Add Shift**.
   The Add Shift dialog box opens.
2. Add the current date by clicking **Add selected date to the list**.
3. Add different or additional dates, if desired. Click the calendar, select dates, and then click **Add selected date to the list**.
   If you select the wrong date, hover your mouse over the date (above the date field) until the "x" appears and then click it.
4. (Optional) If you want to specify different settings for each added preference, click **Populate**.
   If each preference has the same settings, you don't need to use this option.
5. In the **Shifts** drop-down menu, select a shift.
6. Select a **Start Time** in the drop-down list.
7. Enter an **End Time** and check **Next Day**, if applicable.
8. In the **Comments** field, enter any applicable comments.
9. Click **Save** (or **Cancel** to discard this preference) and close the dialog window.

> **Tip**
> When adding a shift to your preferences, you might see fewer available start times or possibly no applicable start times, depending on the time zone you selected. In this case, go to **Configuration** > My Settings and select either the site time zone or try another time zone.

Adding availability preferences

Link to video

To add your availability preferences:

1. Click **Add Availability**.
   The Add Availability dialog box opens.
2. Add the current date by clicking **Add selected date to the list**.
3. Add different or additional dates, if desired. Click the calendar, select dates, and then click **Add selected date to the list**.
   If you select the wrong date, hover your mouse over the date (above the date field) until the "x" appears and then click it.
4. (Optional) If you want to specify different settings for each added preference, click **Populate**.
   If each preference has the same settings, you don't need to use this option.
5. In the **Start Time** field, enter the time that you want this availability preference to begin, including am or pm.
6. In the **End Time** field, enter the time that you want this availability preference to end, including am or pm.
7. Check **Next Day**, if applicable.
8. In the **Comments** field, enter any applicable comments.
9. Click **Save** (or **Cancel** to discard this preference) and close the dialog window.

Tip

You can use Availability Patterns to add preferences, enabling you to specify availability for a range of days at once. See Using patterns to make preferences.

Adding day-off preferences

Link to video

To add your day-off preferences:

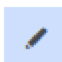
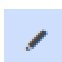
1. Click **Add Day Off**.
   The Add Day Off dialog box opens.
2. Add the current date by clicking **Add selected date to the list**.
3. Add different or additional dates, if desired. Click the calendar, select dates, and then click **Add selected date to the list**.
   If you select the wrong date, hover your mouse over the date (above the date field) until the "x" appears and then click it.
4. (Optional) If you want to specify different settings for each added preference, click **Populate**.
   If each preference has the same settings, you don't need to use this option.
5. In the **Comments** field for each preference, enter applicable comments.

6. Click **Save** (or **Cancel** to discard this preference) and close the dialog window.

Editing preferences

Use the following procedures to edit a shift, availability, or day off preference:

Link to video

- To edit preferences in the **Calendar** view:
    1. Click the preference in the calendar that you want to edit.
       A dialog box opens with the preference details.
    2. Click **Edit** .
    3. When the Edit <*preference*> (shift, availability, or day off) dialog window opens, make the appropriate changes.
    4. Click **Save** (or **Cancel** to discard the changes) and close the dialog window.
- To edit preferences in the **Details** view:
    1. Click **Edit**  beside the preference you want to edit.
    2. When the Edit <*preference*> (shift, availability, or day off) dialog window opens, make the appropriate changes.
    3. Click **Save** (or **Cancel** to discard the changes) and close the dialog window.

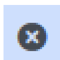
Notes about editing preferences

- You cannot change the date when editing preferences.
- If WFM can schedule your preference, the revised preference appears in the Calendar view.
- Available shift start times can differ, if a time zone, other than site time zone, is selected.
- When editing Shift preferences, you might see fewer available start times or possibly no applicable start times, depending on the time zone you selected. In this case, go to **Configuration** > **My Settings** and select either the site time zone or try another time zone.
- Your preferences are not guaranteed to be assigned to you unless your supervisor grants them prior to scheduling. If your preferences are not granted, WFM schedules as many preferences as possible according to the rules configured for your site.

Deleting preferences

Link to video

To delete a preference in the **Details** View:

1. Click the check box next to the preference(s) you want to delete.
2. Click the **Delete** button.
3. Or, click **Delete**  beside the preference that you want to delete.
4. When the Confirmation dialog opens, click **Yes** to to proceed or **No** to cancel the action.

To delete preferences in the **Calendar** view:

1. Click the preference in the calendar that you want to delete.
   A dialog box opens with the preference details.
2. Click the "x" in the upper-left corner of the **Details** dialog box.
3. When the **Confirmation** dialog box opens, click **Yes** to proceed with the deletion or **No** to cancel it.

Using availability patterns

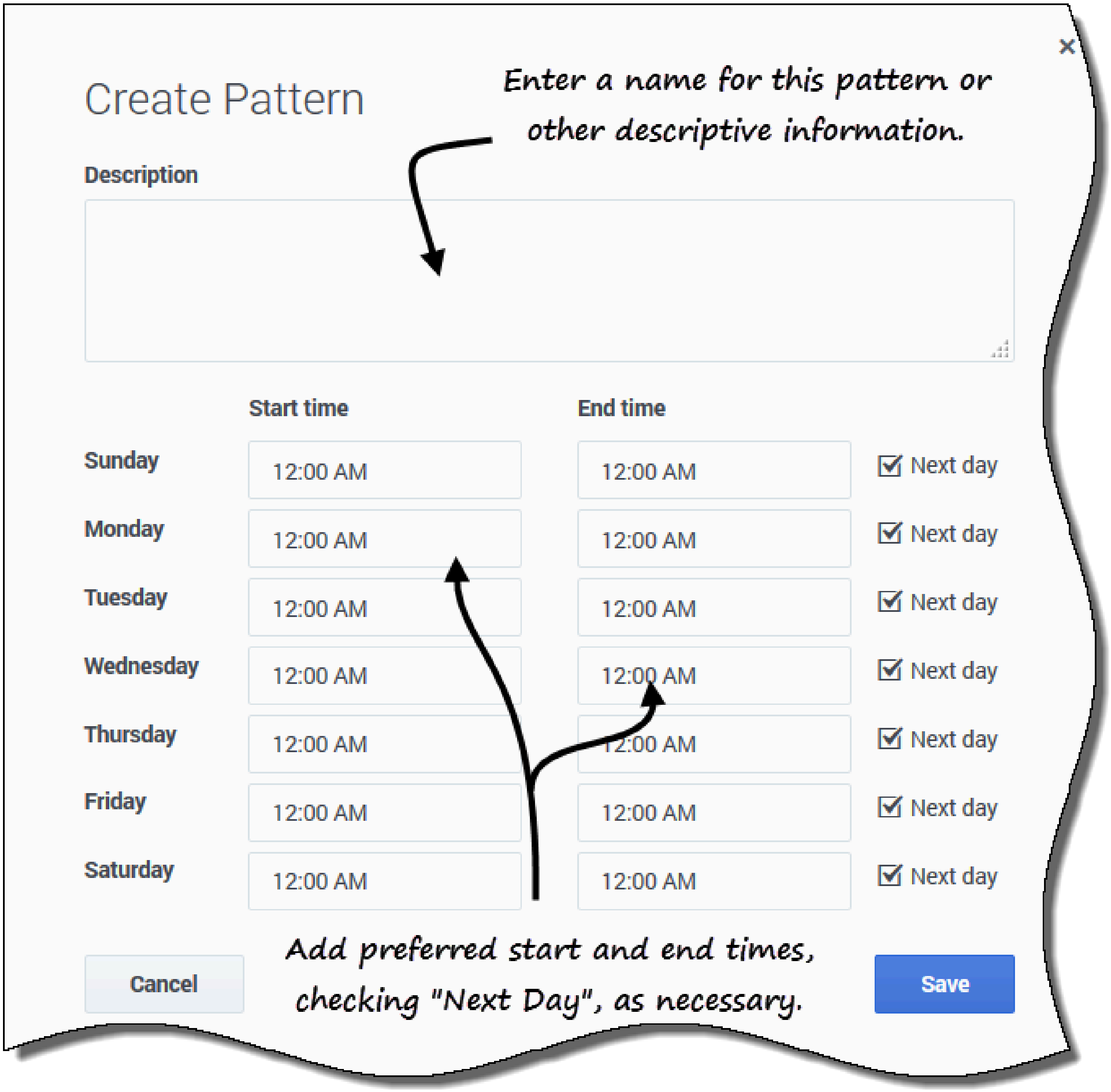
Create *availability patterns* to let your supervisor know your availability preferences, indicating the start and end times you prefer to work in a single week or multiple weeks. Your availability patterns can specify different start and end times for each day, but once you create the *pattern* you can reuse it multiple times. Availability patterns are displayed in the **Preferences > Availability Patterns** view.

> **Tip**
>
> When adding or editing preferences, you can select your preferred time zone. When you create availability preferences, the time zone you chose is applied to the start and end times that are specified in availability patterns. The start and end time values in the pattern itself will be in the chosen time zone and do not change if the time zone changes.

Use the **Availability Patterns** view to:

- Create, edit, or delete an availability pattern.
- Create an availability preference based on an availability pattern.

Creating availability patterns



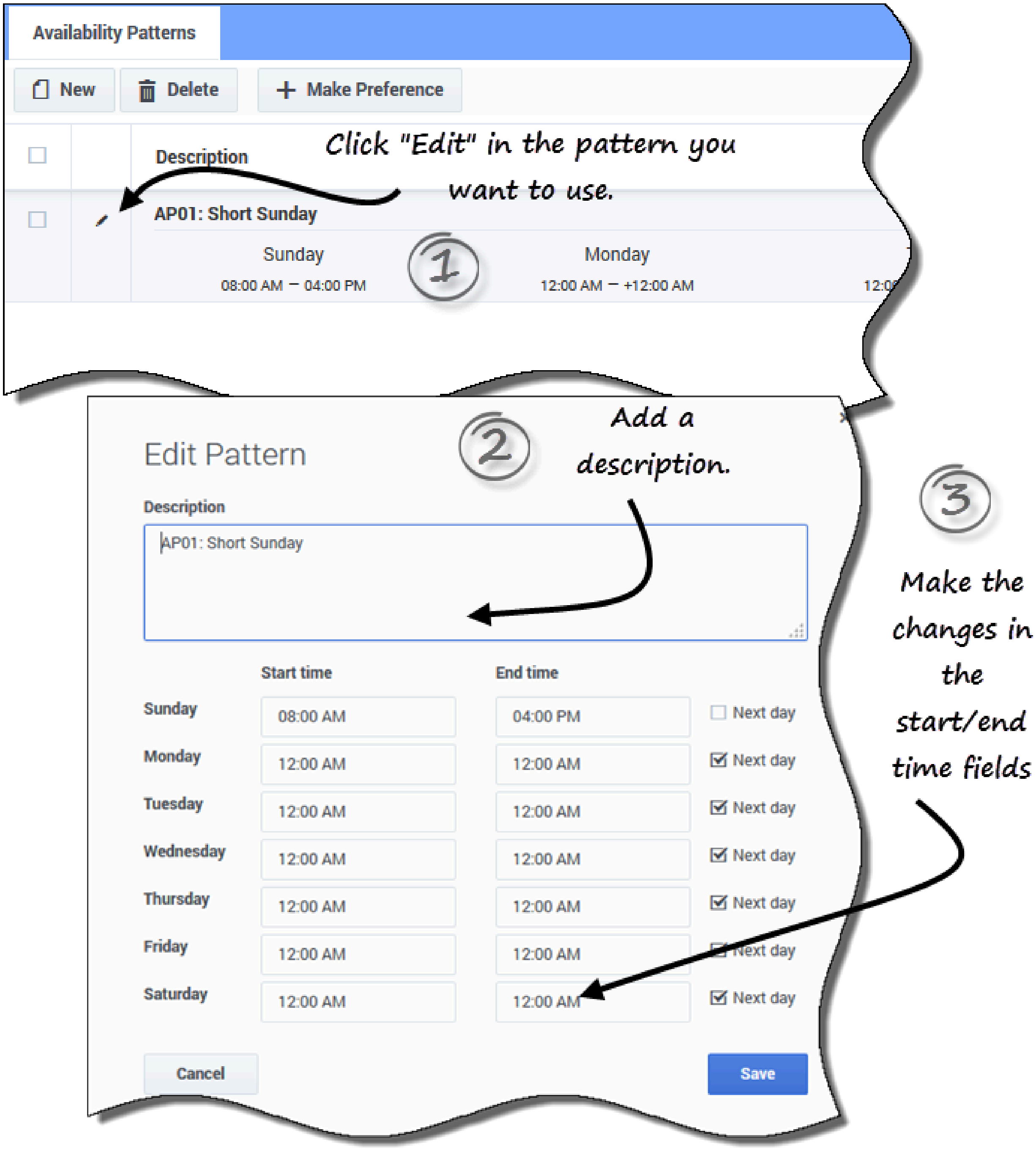
To create a new availability pattern:

1. In the Availability Patterns view, click **New**.
   The Create Pattern dialog box opens.
2. In the **Description** field, enter a name for the pattern.
3. Enter the **Start time** and **End time** (in hours and minutes) for each day of the week.

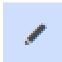
Start and end times are displayed in 12- or 24-hour format, depending on your computer's regional settings.
You cannot leave start and end times blank.

4. Select **Next Day** for any end times that run into the next day.
5. Click **Save** (or **Cancel** to discard the changes and close the dialog box).

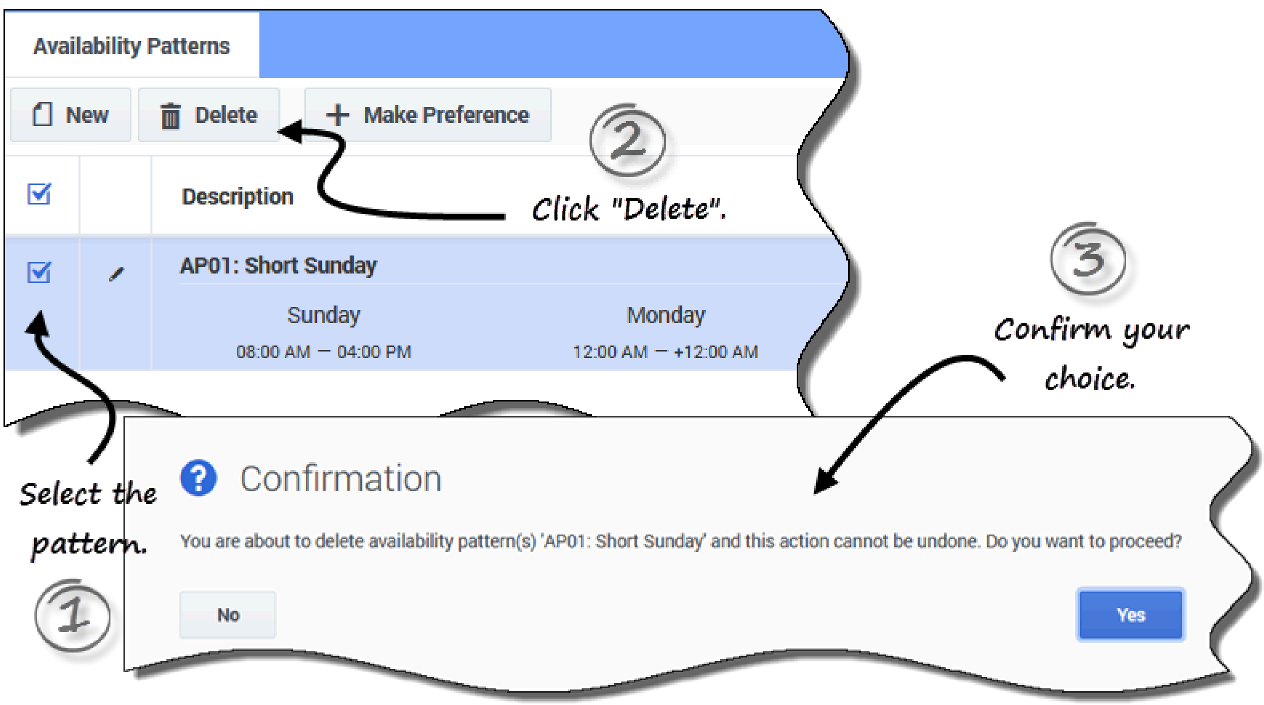
Editing patterns



To edit an existing availability pattern:

1. Click **Edit**  beside the Availability Pattern you want to edit.
   The Edit Pattern dialog box opens.
2. In the **Description** field, add a brief description for this pattern.
3. Change the start times and end times, selecting **Next Day**, if applicable.
4. Click **Save** (or **Cancel** to discard the changes and close the dialog box).

Deleting patterns

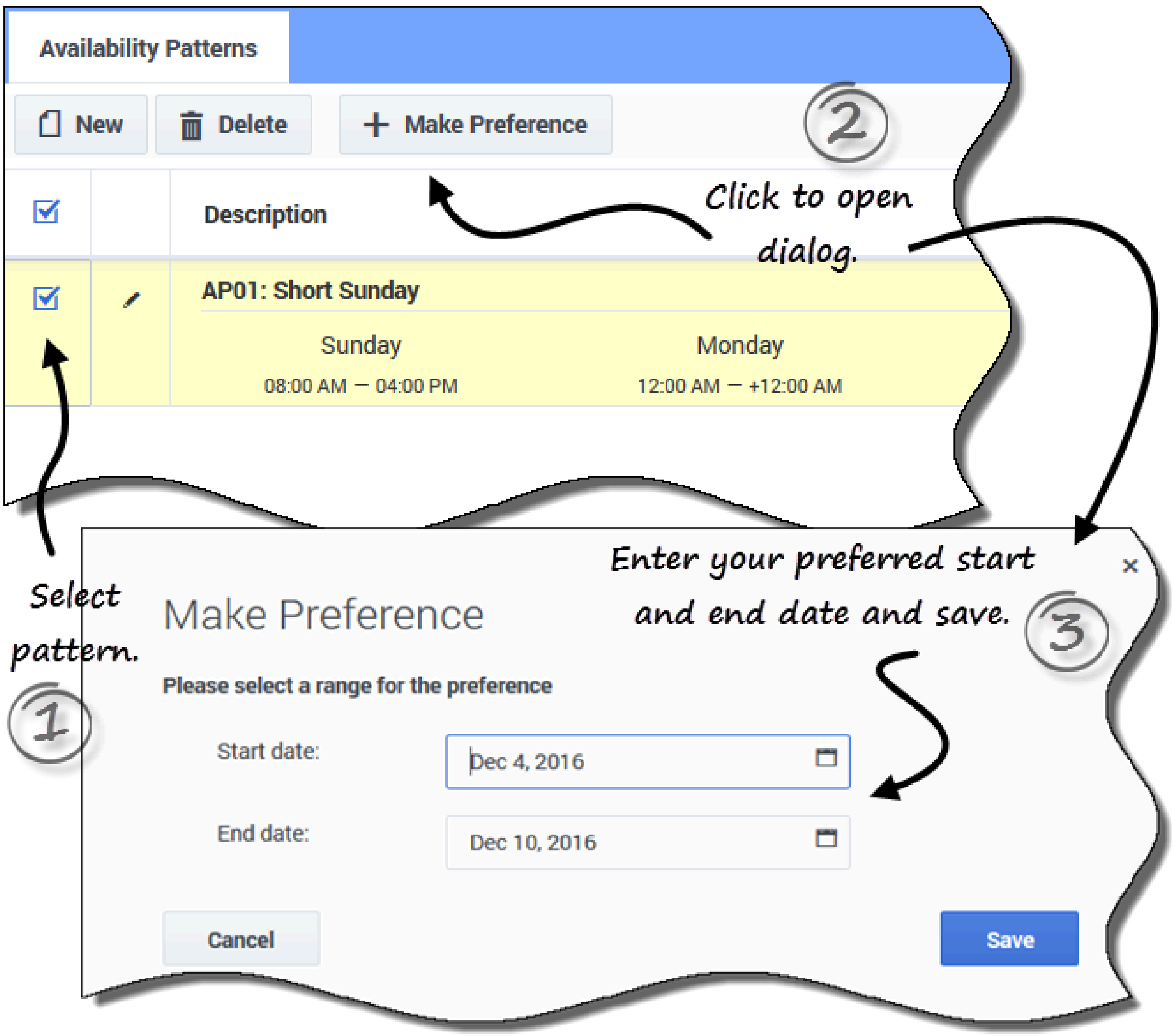


To delete an availability pattern:

1. Click the check box beside the Availability Pattern you want to delete.
2. Click **Delete**.
3. When the Confirmation dialog open, click **Yes** to delete the pattern or **No** to cancel the action.

Using patterns to make preferences

When you *make a preference* in this view you are using an existing availability pattern to add your availability preference. You can also add availability preferences for individual days. See Adding availability preferences.



To make an availability preference using an existing pattern:

1. Select the check box beside the Availability Pattern you want to use for this preference.

2. Click **Make Preference**.
   The Make Preference dialog box opens.
3. In the Start date and End date fields, enter the applicable date range for your preference.
4. Click **Save** (or **Cancel** to discard the preference and close the dialog).

You can view the preferences you made using availability patterns in the Calendar or Details view. To edit or delete the preferences you made using availability patterns, see Editing preferences or Deleting preferences.

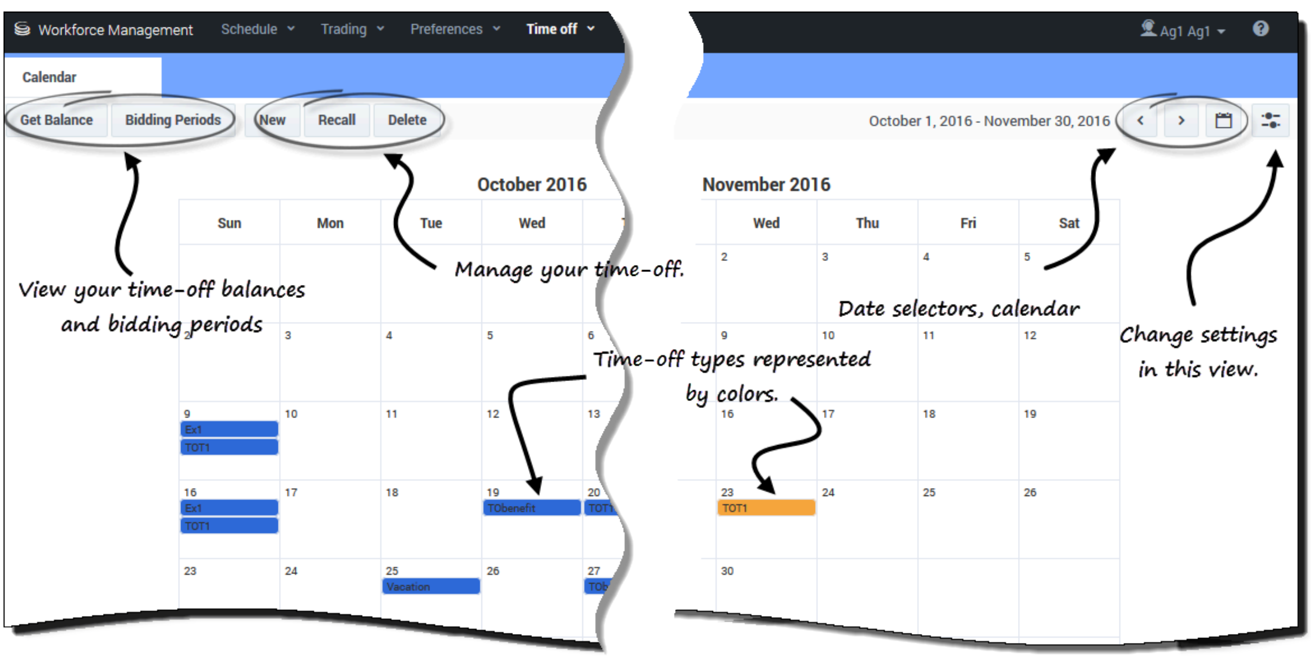
Time off

Clicking **Time Off** in the Menu bar displays a drop-down menu, from which you can select one of two views, Calendar and Details. Use these views to:

- View your requested time off in the calendar, with its status.
- Request time off.
- Edit, recall, or delete time-off requests that have not yet been granted or scheduled.
- View your time-off balance for any desired date.
- View bidding periods for selected dates.

Viewing time off in the calendar

Use the **Calendar** view to view all of your time-off requests and their statuses. You can perform all of the tasks required to effectively manage your time-off requests in this view.



You'll find the following settings and controls in this view:

- Get Balance—Use this button to open the **Balance** dialog and view your time-off balances.

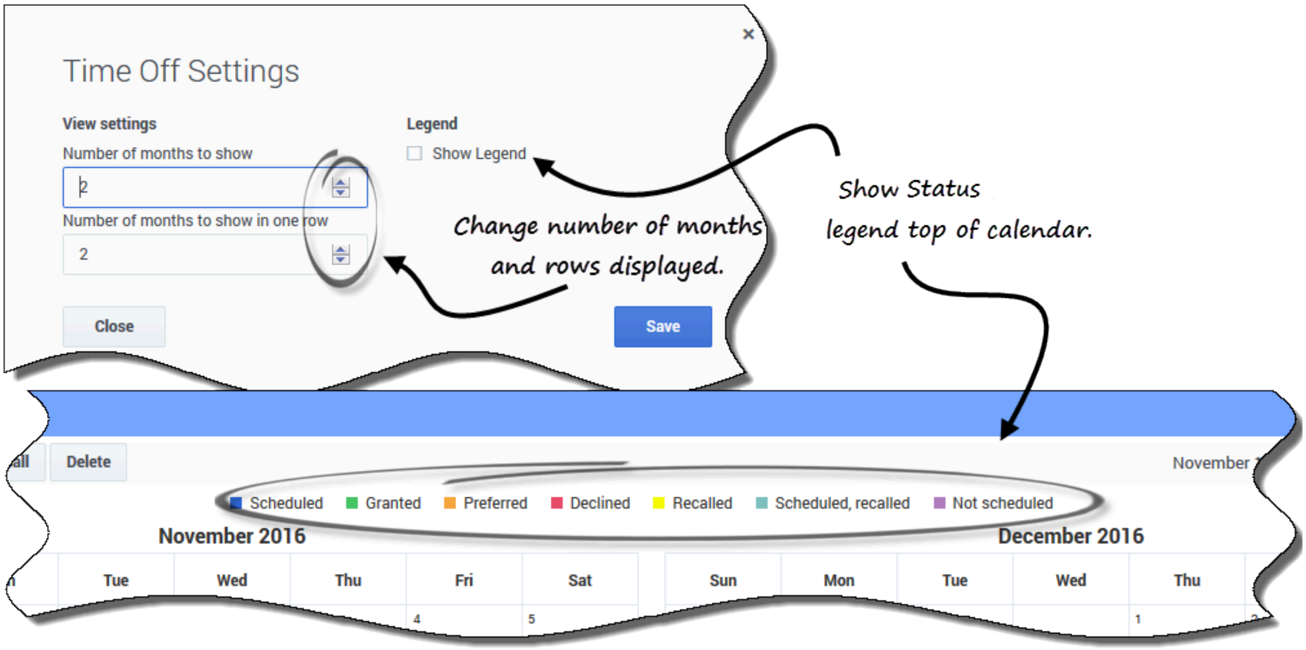
- Bidding Period—Use this button to view bidding periods or change your status in the bidding process.
- New, Recall, and Delete—Use these buttons to make, recall, or delete time-off requests.
- **Date selectors and Calendar**—For a description how to use these controls, see Changing the date.
- Settings—Click this icon to open a dialog box that enables you to change the data display in this view.
- **Legend**—Each status displayed in the calendar (Declined; Granted; Preferred; Scheduled, Recalled; Scheduled; Not Scheduled; and Recalled) is represented by its own color. To display the legend in this view, see Changing the view settings.

For more information about statuses in the Legend, see Preference statuses and hierarchy.

> **Tip**
>
> If you do not see **Time Off** in the Menu Bar, then the Time-Off Planner is not enabled for your contact center.

Changing the view settings

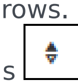
You can change the way you view information in the **Calendar** view by changing the settings to display only the current month (default) or multiple consecutive months, or display a legend that describes the color-coded statuses.

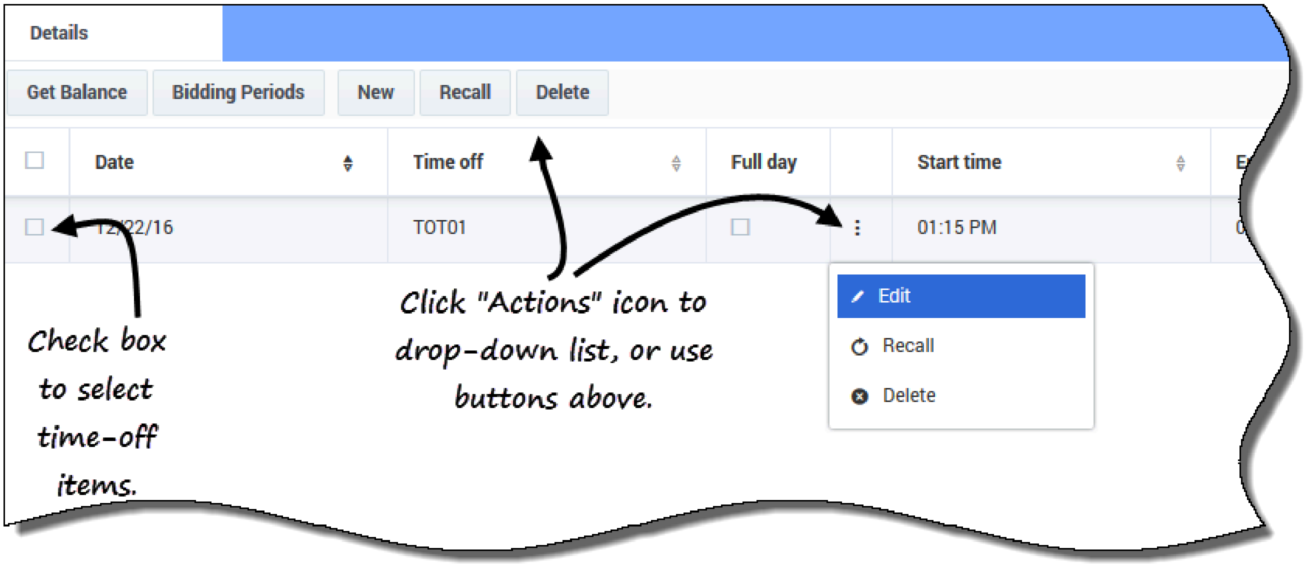


To change the settings in this view:

1. In the upper-right corner, click **Settings**.
   The Settings dialog box opens.
2. To change the number of months and how they are displayed, enter a number in these two fields or use the up or down arrows:
   - **Number of months to show**
   - **Number of months to show in one row**
3. To display the statuses legend above the calendar, enter a check mark in the **Show Legend** check box.
4. **Save** the settings (or discard them by clicking **Close**).

Viewing time-off details

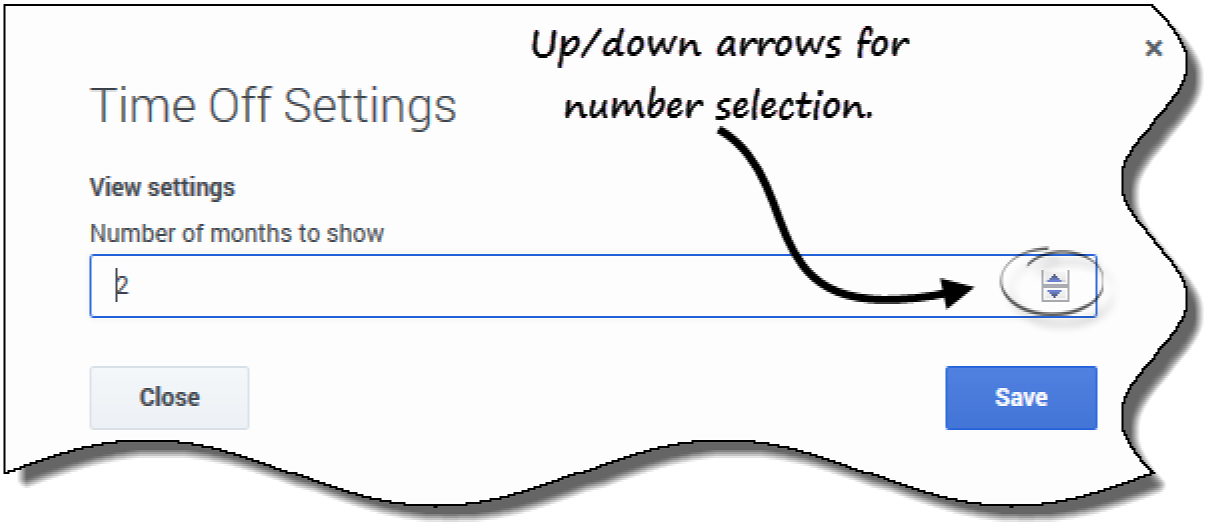
Use this view to see all of the details for each of your time-off requests in a table. In the **Details** view, the following information is displayed in columns and rows. Each column can be sorted in ascending or descending order by clicking the arrow controls  in the column.



- *Check boxes*—Select the check boxes when you want to take action (recall, or delete a time-off request). Select or clear the check box in the header to operate all check boxes in the column (and thus, all rows) with one click.
- **Date**—The date that time-off is requested.
- **Time off**—The time-off type.
- **Full day**—Indicates whether or not the request is for a full day. If the time-off request is for a full day, the check box is checked. If the request is for a part-day, the check box is unchecked.
- **Actions**—Click this icon to open a drop-down list of actions, enabling you to edit, recall, or delete the item in that row.
- **Start time**—The time when the time-off begins.
- **End time**—The time when the time-off ends.
- **Paid hours**—The number of paid hours for the time-off period.
- **Status/reason**—The status of the time-off and the reason why the WFM system set a particular status for this time-off request, such as Declined or Not Scheduled.
- **Comments**—Comments are notes that you can entered when submitting or editing time-off requests.

Changing the view settings

You can change the settings in the **Details** view to display only the current month (default) or multiple consecutive months.



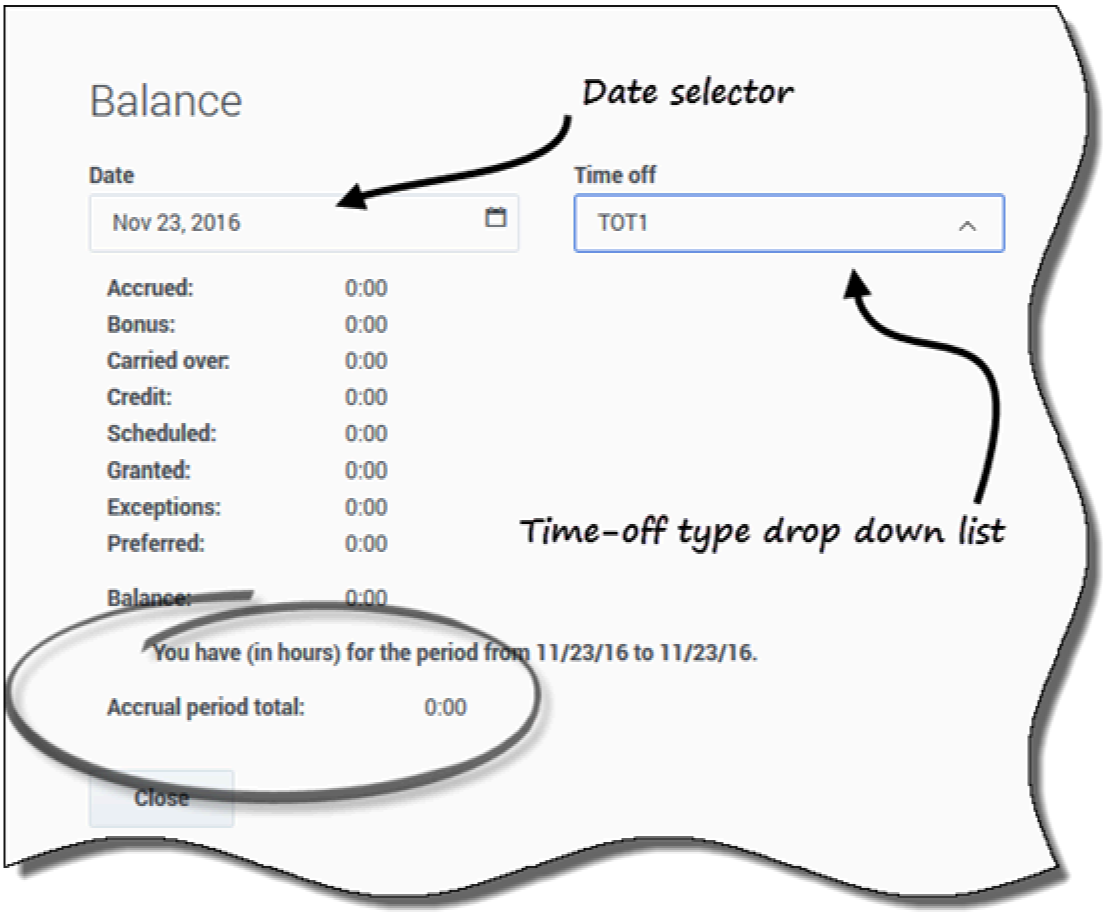
To change the settings in this view:

1. In the upper-right corner, click **Settings**.
   The Settings dialog box opens.
2. To change the number of months that display in this view, enter a number in the **Number of months to show** field, or use the up or down arrows.
3. **Save** the settings (or discard them by clicking **Close**).

Viewing your time-off balances

It's important for you to be able to track your balance for various types of time off. For example, if you are thinking about your vacation, click the date before the day you would like to start your vacation to see whether you will have accumulated enough time off by then to take it.

Tracking your balances



To view your time-off balances:

- Click **Get Balance** in the upper-left corner of either of the **Time Off** views (Calendar or Details).
  The Balance dialog opens, showing your time-off balance for the date selected in the calendar.
  In the open dialog box, you can change the date and/or select a different time-off type from the Time off drop-down list to view its balance.

For example, if you want to know what your time-off balance is to the end of the year, in the **Date** field, enter the last day of the year.

Balance categories explained

This table explains each category that appears on the Balance dialog.

Accrued	Total number of time-off hours that you accumulated for the current period, up to the selected day. (To view the total accrued hours for the entire period, select the last day of the period.)
Bonus	Total bonus time-off hours. Bonus hours are awarded and configured by your supervisor or scheduling manager and are included in your total time-off balance. Supervisors determine when they are awarded, the number of hours that are awarded, and when they can be used (based on the start and expiration dates). Bonus hours are extracted from time-off balances before accrued time-off hours. If you are unsure of how and when you can use your bonus hours, ask your supervisor or manager.
Carried Over	Total time-off hours carried over from the previous period. Some companies limit the number of hours that you can carry from one year to the next. Tip This information is for the current time-off period. This is the time since the last carry-over date (often January 1), or, if the carry-over date has not yet occurred, the time since your date of hire. The carry-over date might be different for the different types of time off.
Credit	Total time-off hours that can be taken in advance, if applicable. Some companies allow you to request more time off than you currently has accrued, with the expectation that you will accrue the necessary time before the end of the year.
Scheduled	Total scheduled time-off hours for the period, up to the selected day. To view the total scheduled hours for the entire period, select the last day of the period. You cannot remove Scheduled or Granted time off in **Time Off** module, but can remove Preferred time off.

Granted	Total requested time-off hours that have been granted. To view the total granted hours for the entire period, select the last day of the period.
Exceptions	Total part-day exceptions used as time-off hours that have been granted.
Preferred	Total hours of *preferred time off* (requested, but not yet declined, granted or scheduled). To view the total preferred hours for the entire period, select the last day of the period.
Balance	Total number of time-off hours for the current period, up to the selected day. The balance is calculated as the sum of accrued, bonus, carried-over, and credit hours, minus granted, preferred, exceptions, and scheduled hours. Tip This balance's limit can be exceeded. If the limit is reached before the end of the Accrual Period, you can progressively accrue more time off if you request it, and if your supervisor grants it.
Accrual Period Total	Total hours of time off for which you are eligible in the current period. This value changes only when you select a day in a different time-off period.
Lead Time (weeks)	If your supervisor has enabled time-off auto-granting, you can enter your time-off preferences at least this number of weeks before the first desired time-off date. Your preferences are granted automatically if your absence would not excessively burden the company, and if you have enough time-off hours available to cover the request. If your supervisor has not enabled auto-granting, **Lead Time** is not displayed in **Balance** dialog.

When time-off types no longer apply

The **Time off** drop-down list box in the **Balance** dialog displays all the time-off types that are configured for your site. Some of these might not be relevant to you.

You can create, edit, delete, or recall time-off requests only for time-off types that are assigned to you. Time-off types that are not assigned to you appear in the drop-down list with dash before the name (for example, -TO1).

Workforce Management enables you to see time-off types from that are not assigned to you, but you cannot perform tasks with them (such as requesting time off or viewing your time-off balance).

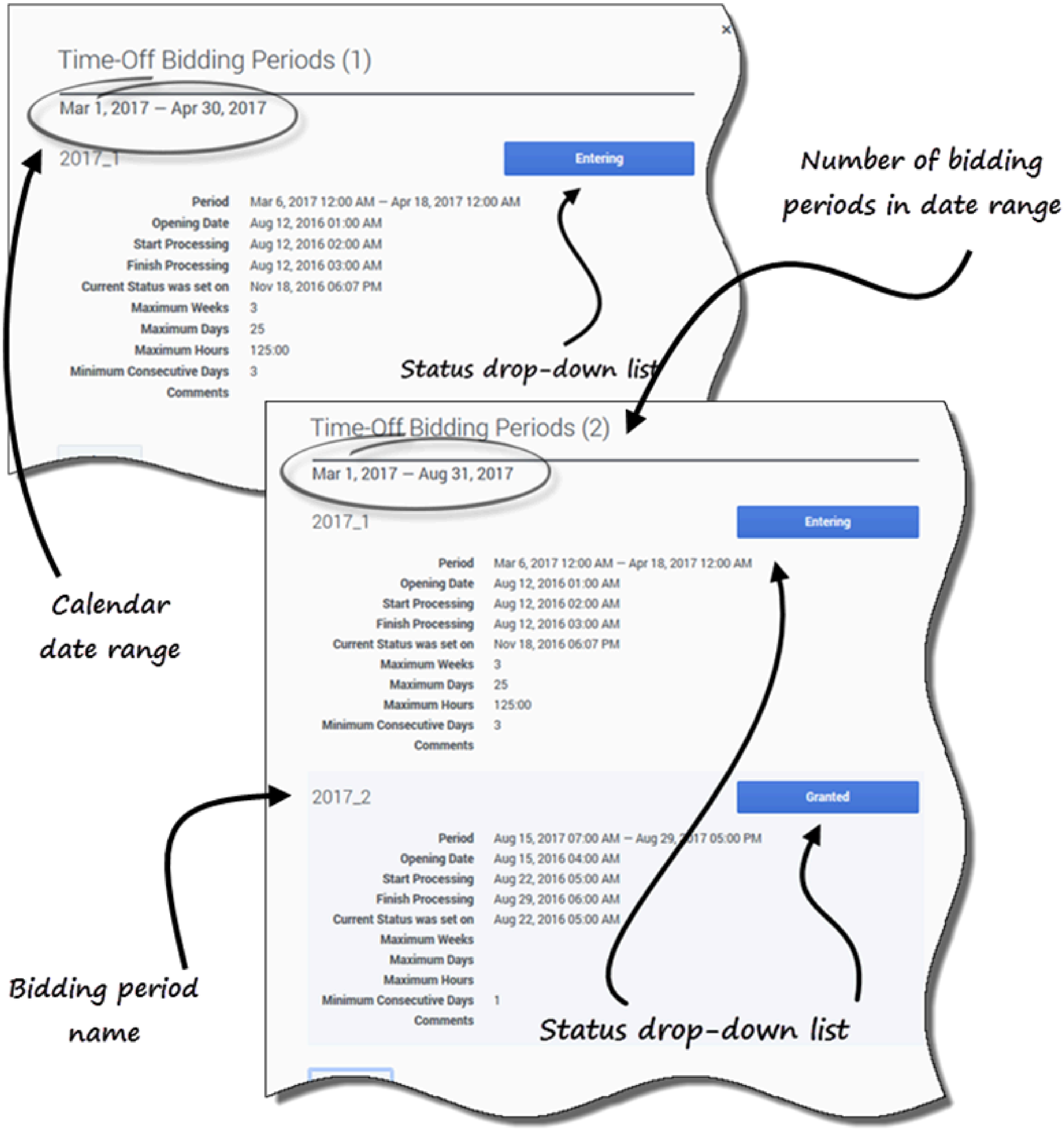
Viewing time-off bidding periods

If your supervisor has enabled time-off bidding in your contact center you can view bidding periods in which you can request time off.

Viewing bidding periods

Click **Bidding Periods** at the top of the **Time Off** Calendar or Details view to open the **Time-Off Bidding Periods** dialog, where you can view all of the bidding periods applicable for the date range that you selected in the calendar.

The date range displays just below the divider line in the dialog and the number of available bidding periods display in brackets. The name of the bidding period displays just below the calendar dates. In the figure, bidding periods are shown for two different date ranges.



- **Status** *drop-down list*—Enables you to change the current status of your requests for this bidding period. You can choose **Entering** or **Ready**. To find out what these and other status mean, see Bidding period statuses.
- **Period**—The date and time period of this bidding period.

- **Opening Date**—The opening date and time of the bidding period on which you can begin to request time off for this bidding period. If you request time off for this bidding period before this date and time, you will receive an error message.
- **Start Processing**—The date and time that WFM will start processing requests for this bidding period.
- **Closing**—The date and time that WFM will finish processing requests and close the bidding period.
- **Current Status was set on**—The date and time that the current status was set.
- **Maximum Weeks**—The maximum number of weeks allowed per time-off request.
- **Maximum Days**—The maximum number of days allowed per time-off request.
- **Maximum Hours**—The maximum number of hours allowed per time-off request.
- **Minimum Consecutive Days**—The minimum number of consecutive days allowed per this request.
- **Comments**—Notes or additional information about the bidding period (added by your supervisor). Comments are blank if supervisor does not add them.

Bidding period statuses

You can have one of the following statuses at various times during bidding period processing:

- **Entering**—WFM automatically assigns this status to you when the bidding period opens, indicating that you can enter time-off requests that will be processed in the current bidding period.
  You can set this status at any time to indicate that you are changing a time-off request. Your supervisor can also set this status.
- **Ready**—You set this status after you submit your time-off requests, indicating that they are ready for processing within the current bidding period; or if you have not submitted any requests, but are ready for processing within current bidding period.
  Your supervisor can also set this status.
- **Skipped**—Your supervisor sets this status, signaling the bid assignment process to ignore your requests.
  You cannot set this status, but your supervisor can set this status at any time.
- **Waiting**—WFM sets this status when it cannot grant all of your requests, due to limitations set in the time-off rule or time-off limits. WFM will wait for you to change your requests or enter new ones. When the waiting period is over or WFM finds that you have changed your requests, the process resumes and your requests can be granted.
  Neither you nor your supervisor can set this status.
- **Processed**—WFM sets this status when all of your requests have been successfully granted; or when you have not submitted any requests.
  Neither you nor your supervisor can set this status.
- **Timed Out**—WFM sets this status when the time allotted to allow you to edit or enter time-off requests has expired. At this point, the bid assignment process will move on to the next agent.
  Neither you nor your supervisor can set this status.

To find out more about the bidding feature, see How bidding works.

How bidding works

When time-off (vacation) bidding is enabled and you submit time-off requests with dates that fall within a bidding period, they are not processed right away. Instead, WFM delays granting the time-off requests until the processing date. On that date WFM grants all time-off requests from the bidding period, based on seniority and/or rank. Time-off requests that are not granted are processed, based on their submission order, if there are available slots in time-off limits.

When you submit time-off requests that fall into a bidding period, you will see a warning dialog informing you that the submitted request falls into the bidding period. If you select **Proceed**, the time-off request is submitted for later processing.

Time-off requests that are wait-listed are processed at a later time, based on the configured time-off limit or restriction, and are no longer processed on a first-come, first-served basis.

After submitting your time-off requests with dates that fall within a bidding period, you will change the bidding period status to **Ready** in the **Time-Off Bidding Period** dialog.

After WFM processes your time-off requests and you return to the **Time Off** views, you will see all of the days for which you requested time off. In the Calendar view, click a specific day to see the request details, including its status (for example, whether or not the request has been granted). You can do this for any time-off request; not just the time-off requests that fall within a bidding period.

Editing time-off items during bidding

Be aware, when you recall any time-off item in a batch that WFM performs the action on all of the items that were submitted in that batch, considering it one request.

Time-off balances

Time-off requests that are created and granted when the time-off bidding feature is enabled, appear as regular time-off items and impact your time-off balances for that specific time-off type.

Managing your time-off requests

Use the **Time Off** views (Calendar or Details) to effectively manage your time-off requests. Using the these views, you can:

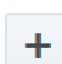
- Add new requests
- Edit existing requests
- View time-off details within requests.
- Recall submitted requests
- Delete requests.

> **Tip**
> You can only recall and delete requests if they have not been granted or scheduled.

Adding time-off requests

Link to video

To add a time-off request:

1. Click **New**.
   The Add Time off dialog box opens.
   You can also select several dates by using the keyboard and mouse. Before clicking New, press Ctrl or Shift and select dates by clicking the left mouse button or simply press the left mouse button and move your pointer.
2. Click the **Calendar** icon and select the date(s) that you want to have off.
3. Click **Add selected date to the list** .
   The date displays above the calendar field. If you've made a mistake and want to delete this date, hover your mouse over it and when the 'x' displays, click it.
4. Continue to add dates by repeating steps 2 and 3, if required.

Procedure continued...

1. (Optional) If you want to specify different settings for each added request, click **Populate**.
   If each time-off item has the same settings, you don't need to use this option.
   The (time-off) Limits bar displays above the Time off field (see video).
2. In the drop-down list, select the time-off type.

3. If you are requesting a full day, select the **Full day** check box.
   For part-day requests, leave this check box empty.
4. Enter the **Start time** and **End time**.
5. If the end time runs into the next day, select the **Next day** check box.
6. In the **Comments** field, enter any information that relates to this request.
   Your supervisor might choose to consider these comments when deciding whether to grant or deny time-off requests.

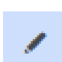
Tip

- If WFM successfully processes your requests, a message appears to confirm they've been processed and the time-off items display in **Calendar** or **Details** view.
- If WFM returns error messages, it opens the **Review validation messages** dialog which lists the errors. Click **Cancel** to return to the **Add Time off** dialog and edit your request.
- WFM declines time-off requests that violate the terms of your contract. If specifically configured to do so, WFM also declines requests that fall on a day with a granted day off, granted availability with duration of `0` in the calendar, or a rotating pattern day off.

Editing time-off requests

Link to video

To edit time-off requests in the Calendar view:

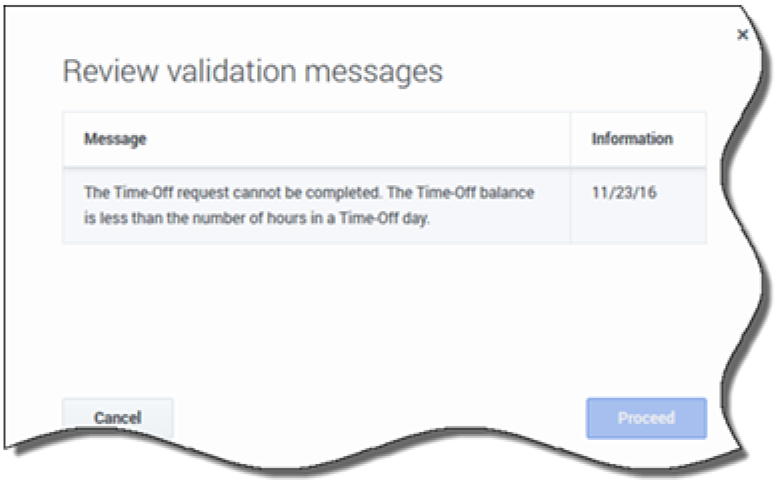
1. Click the time-off request you want to edit.
   A dialog box opens showing the time-off details.
2. Click **Edit** .
   The Edit Time off dialog box opens.
3. Make any changes you find necessary and then click **Save**.
   If WFM successfully processes your changes, a confirmation message displays.

To edit a time-off request in the Details view:

1. Click **Actions** in the row that has the time-off item you want to edit.
2. A drop-down list opens. See the graphic in Viewing Time-Off Details.

3. Select **Edit**.
   The Edit Time Off dialog opens.
4. Make changes as necessary and click **Save**.

Review validation messages



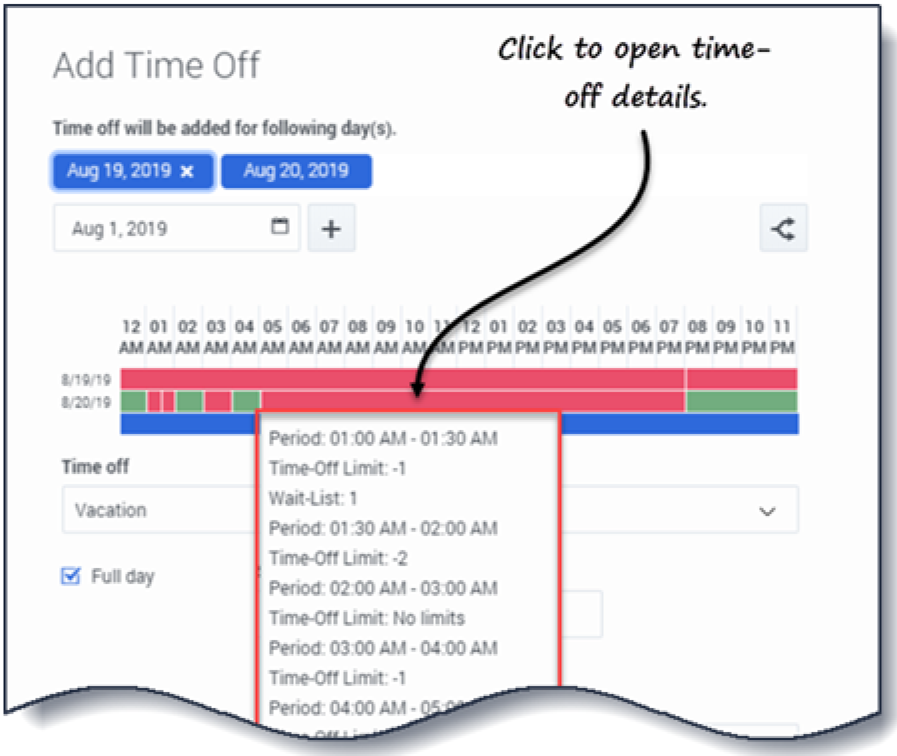
If the server returns error messages, you might see a message similar to the one shown in the figure (**Review validation messages** dialog box).

Viewing time-off details within requests

Link to video

When adding or editing time-off requests, you'll see the following:

- The time-scale at the top, divided into 1-hour increments.
- A bar for each time-off item in the request. The bar could have various green and red intervals in the same day, representing the time-off limits. Green represents positive-value time-off limits. Red represents negative-value time-off limits.
- A solid blue bar, representing the total period of time available for time-off.



Click the time-off limits bar for any request to see its **Period**, **Time-Off Limit**, and **Wait-List** details. If the time-off limits bar has multiple intervals of both green and red, you might also see multiple wait-list periods and values.

Depending on how the locale is set in your browser, you might see different formats in the time-scale. For example, if am/pm is selected in your browser's locale settings, the 1-hour increments in the time-scale display as 12 AM, 01 AM, 02 AM, etc. If am/pm is not selected, they display as 1, 2, 3, etc.

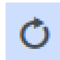
Recalling time-off requests

If you change your mind and want to take back a request, you can recall a time-off request by using either the **Calendar** or **Details** view.

Link to video

To recall a request in the Calendar view:

1. In the calendar, select the time-off request you want to recall.

2. When the dialog opens, click **Recall** .
3. When the **Confirmation** dialog opens, click **Yes** to recall the request or **No** to cancel the action.

To recall a time-off request in the Details view:

1. In the row that shows the details of the request you want to recall, enter a check mark in the first column.
2. Click the **Recall** button.
3. When the **Confirmation** dialog opens, click **Yes** to recall the request or **No** to cancel the action.

You can also use the **Actions** menu to recall time-off items. See the graphic in Viewing time-off details.

In both views:

- After clicking **Recall**, if time-off items are part of a batch, the **Recall** dialog opens listing the items submitted in the batch. Click **Recall** to recall all items or **Cancel** to cancel the action.

The recalled time off is marked in the calendar with one of the following statuses:

- **Recalled** status—Indicates that the item was completely recalled and no longer affects the agent's schedule.
- **Scheduled, Recalled** status—Indicates that your recall request was received, but the item is not yet recalled. The item will remain active and in your schedule until a supervisor removes the time off from the schedule.

If your company uses WFM's notification functionality, then WFM sends a notification to the appropriate supervisor. If autopublish is enabled, WFM republishes the schedule, with the time off removed.

Deleting time-off requests

Delete a time-off request by using either the **Calendar** or **Details** view.

Link to video

To delete a request in the Calendar view:

1. In the calendar, select the time-off request you want to delete.
2. When the dialog opens, click **Delete** .

3. When the **Confirmation** dialog opens, click **Yes** to delete the request or **No** to cancel the action.

To delete a time-off request in the Details view:

1. In the row that shows the details of the request you want to delete, enter a check mark in the first column.
2. Click the **Delete** button.
3. When the **Confirmation** dialog opens, click **Yes** to delete the request or **No** to cancel the action.

You can also use the **Actions** menu to delete a time-off item. See the graphic in Viewing Time-Off Details.

In both views:

- After clicking **Delete**, if the time-off items are in a batch, the **Delete** dialog opens listing items submitted in the batch. Select a single item or the entire batch. Click **Delete** to delete the selected items or **Cancel** to cancel the action.

> **Tip**
> You cannot clear (or select) the check box for a time-off type that you can no longer use.

Deleting autogranted requests

If the autogranting feature is off and a time-off request is Granted, you cannot use the time-off views to remove the time-off request. A supervisor must make the change in WFM Web for Supervisors.

If the autogranting feature is enabled, you can remove Granted time off that has not passed the autogranting lead time listed in the balance dialog.

For example, if the Granted time-off request is three weeks in the future and the lead time is set to two weeks, then the Granted time-off request can be removed. However, if the Granted time-off request is only one week in the future, then the request cannot be removed because it has passed the lead time.

To learn more about autogranting, see How autogranting works.

How autogranting works

If your supervisor enables autogranting, your time-off requests are immediately granted and published to the Master Schedule if these conditions are met:

- The feature is enabled. (Ask your supervisor if it's supported in your contact center.)
- All requested days come after the specified lead time. The lead time is shown on the Balance dialog.
- The time-off request is for more hours than the minimum required for the autogrant feature to apply.
- Your absence does not exceed time-off limits established by your supervisor.
- You have accrued enough time-off hours to cover your time-off request.

If the autogrant feature is disabled, your time-off requests are entered in Preferred status and a supervisor must grant your requests before they can be included in your schedule.

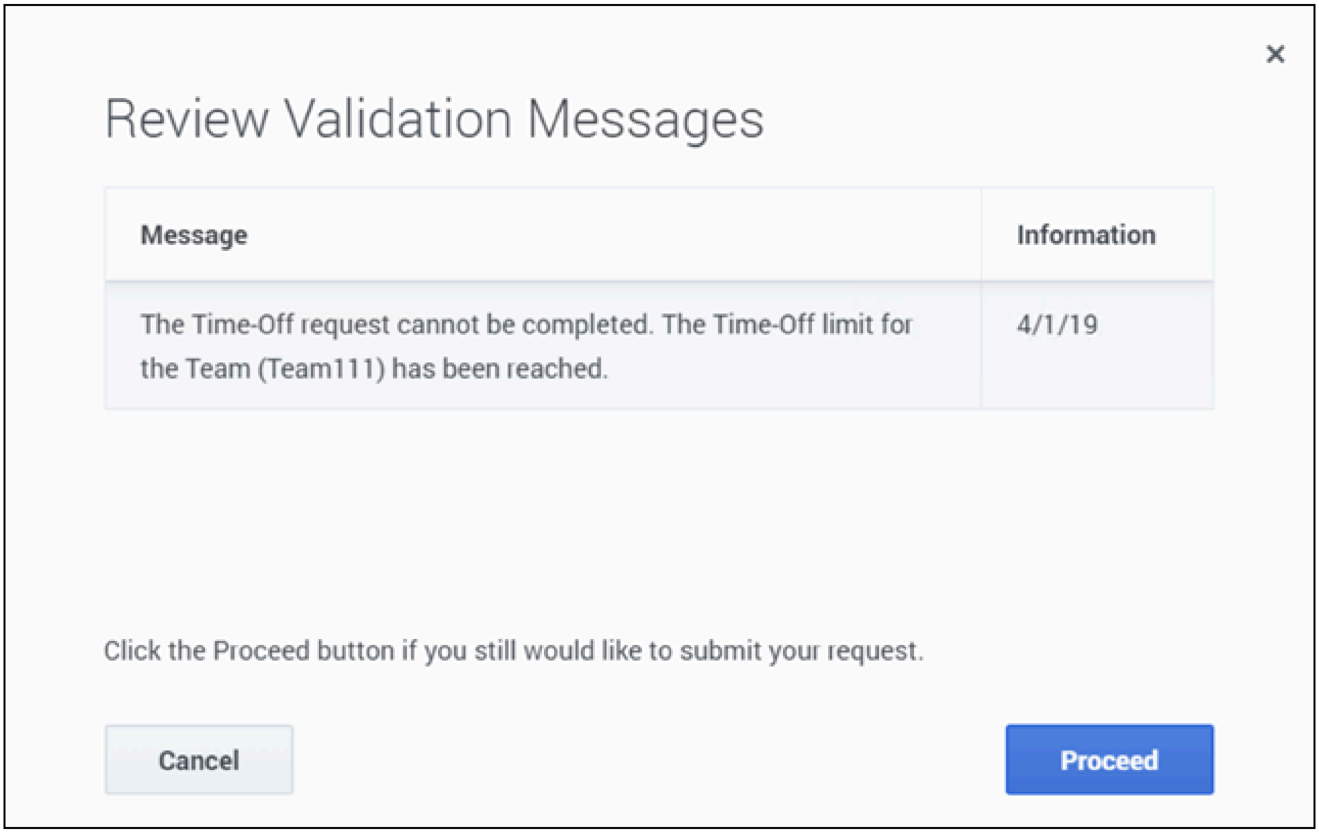
Some conditions apply to only full-day or part-day time-off requests:

- Full-day time-off requests are always auto-published.
- When a full-day time-off request is recalled, WFM restores a baseline schedule if that is available.
  - If the recalled time off itself is a baseline schedule or if a baseline schedule is not available, then WFM inserts a Day Off if the time off was unpaid.
  - If the recalled time off is paid, then WFM schedules a compatible shift with the same number of paid hours as the recalled time off.
- A part-day time-off request must occur during the hours of your (an agent's) shift.
- If a part-day time-off instance overlaps a part-day exception, WFM preempts and removes the exception (if configured.)
- If a part-day time-off instance overlaps another part-day time off, WFM refuses the request.

Important

- If the time-off instance that you added has the status Granted Not Scheduled, WFM will send a notification to your supervisor.
- When you specify either start/end or paid time in a time-off request, WFM verifies the values against these configured constraints: contract availability, minimum of earliest start of all available for the day shifts, maximum of latest end of all shifts.

Wait-listed requests



If your time-off request is eligible for autogranting but there is no available time slot, WFM puts your request in the "wait-list" queue until an appropriate time slot becomes available and then autogrants it. Autogranting must be enabled in your contact center. Ask your supervisor if this process is automatic.

Wait-listed requests in the queue are ordered by the date of the request. If the time slot becomes available, WFM grants the request by order of the request date.

If the conditions described above are not met and WFM cannot autogrant your request, you can send this request to the wait list by clicking **Proceed** in the **Review Validation** dialog that appears when you submit your request.

Bidding

Use the **Bidding** views to see and bid on schedules in open schedule bidding scenarios, or bid on overtime in open overtime offers.

> **Tip**
> The **Bidding** views are accessible from the menu bar only if your administrator has enabled schedule bidding or overtime bidding at your site. If bidding is enabled, but there are no schedule scenarios or overtime offers listed, then none are currently open for bidding.

You can also bid for time-off, see Time-off bidding.

Bidding on schedules

You can access scenarios only during the schedule bidding period (the period in which the bidding scenario is open for bidding). Click **Scenarios** to open a list of scenarios available for bidding. Open a scenario to view schedules and assign bids. Each row in this view displays one bidding scenario and information about each scenario is presented in these columns:

- **Scenario name**—The name of a bidding scenario.
- **Bidding end time**—The date and time that bidding for the scenario ends.
- **Days remaining**—The number of remaining days until bidding closes for the scenario.
- **Start date**—The effective start date for this schedule.
- **End date**—The effective end date for this schedule.

The effective start and end date are in your timezone.

Opening schedule bidding scenarios

To open and view a bidding scenario:

1. In the menu bar, click **Bidding** > **Scenarios**.
2. In the **Scenario name** column, hover your mouse over a scenario and click the link to open it.
   The schedules available for bidding are displayed in a grid.

You can perform the following tasks in the scenario's schedule grid:

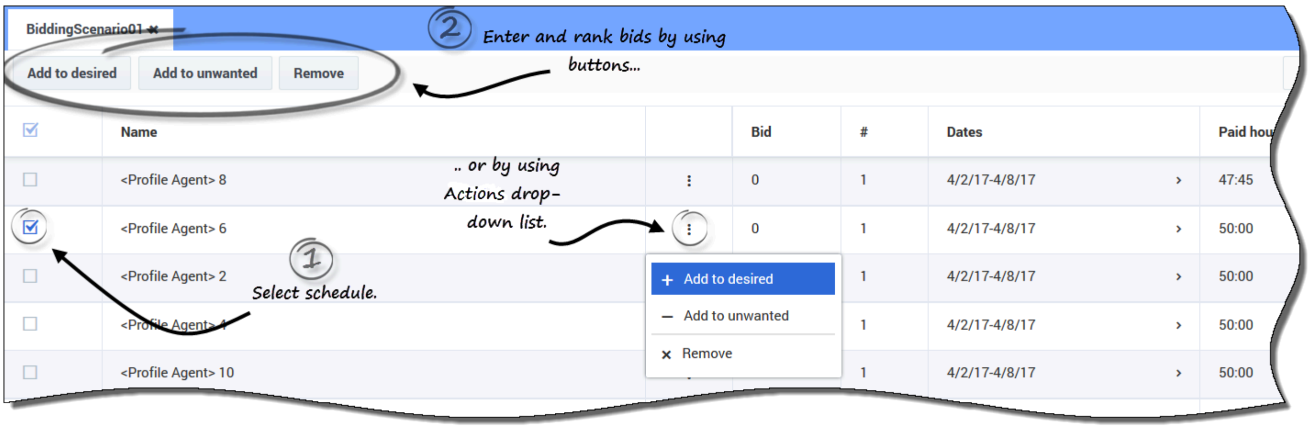
- View available schedules in a grid and expand it to see more details. You might want to do this before entering and ranking your bids.
- Sort or Filter the view of available shifts.
- Bid on and rank schedules by numbering them.

Entering and ranking schedule bids

To enter and rank bids, you add your selected schedules to one of two lists: **Desired** and **Unwanted**. If you select multiple schedules for either of these two lists, you'll notice that each bid is numbered (ranked) in the order that you select them. For example, if you select 3 schedules for the Desired list, your first selection is ranked 1, your second selection is ranked 2, and so on, based on the first in, first out rule. Your selections for the Unwanted list work the same way, except the ranking appears in square brackets. For example, [1], [2], and so on.

> ### Tip
> Before deciding to bid on a schedule, find out how to view the schedule details and

how to sort and filter the schedules grid, to best suit your needs. See Viewing schedules in the scenario.



You can enter and rank your bids for available schedules in two ways:

- Using the add/remove buttons:
    1. Select a check box to select the schedule on the same line.
    2. Click **Add to Desired** or **Add to Unwanted** to add the selected schedule to the corresponding list.
    3. Click **Remove** to remove the selected schedule from either list.
- Using the Actions drop-down list:
    1. In the **Actions** column, click .
    2. Using the drop-down list, add this schedule to your desired or unwanted list, or remove it from either list.

After entering your bids, you might change your mind about the schedules you marked as Desired or Unwanted, or you might want to change the ranking for one or both of these lists. To do this, use the procedures in Managing your bid assignments.

Viewing schedules in scenarios

Before entering your bids and deciding on how you will rank them, you might want to take a close look at the available schedules and their details to find those that are most desirable to you.

Click the link in the scenario name to open the scenario and display the Schedules grid. There are many ways to sort and filter the information in the grid so you can see only the details that are important to you.

Using the Schedules grid

The grid displays information about the available schedules. The grid columns are:

- **Check box**—Displays a check box that you can use to select a row or schedule.
- **Name**—Displays the schedule name and number of weeks if the schedule is longer than one week.
- **Bid**—Displays your current bid for this particular schedule. Clicking the **Actions** icon in this column enables you to add this schedule to your desired or unwanted list, or remove it from either list.
- **#**—Displays the number of instances of this exact schedule that are available to be bid on across the contact center. For example, if the number in this column is 3, then 3 different agents can be granted this particular schedule.
- **Dates**—The date range (or beginning and end dates) for each schedule.
- **Paid hours**—Displays the total paid hours for the week, for each schedule.

Expanding the grid

To get a better view of the details for days or weeks within the schedule, can expand the grid.

To view weeks in a schedule:

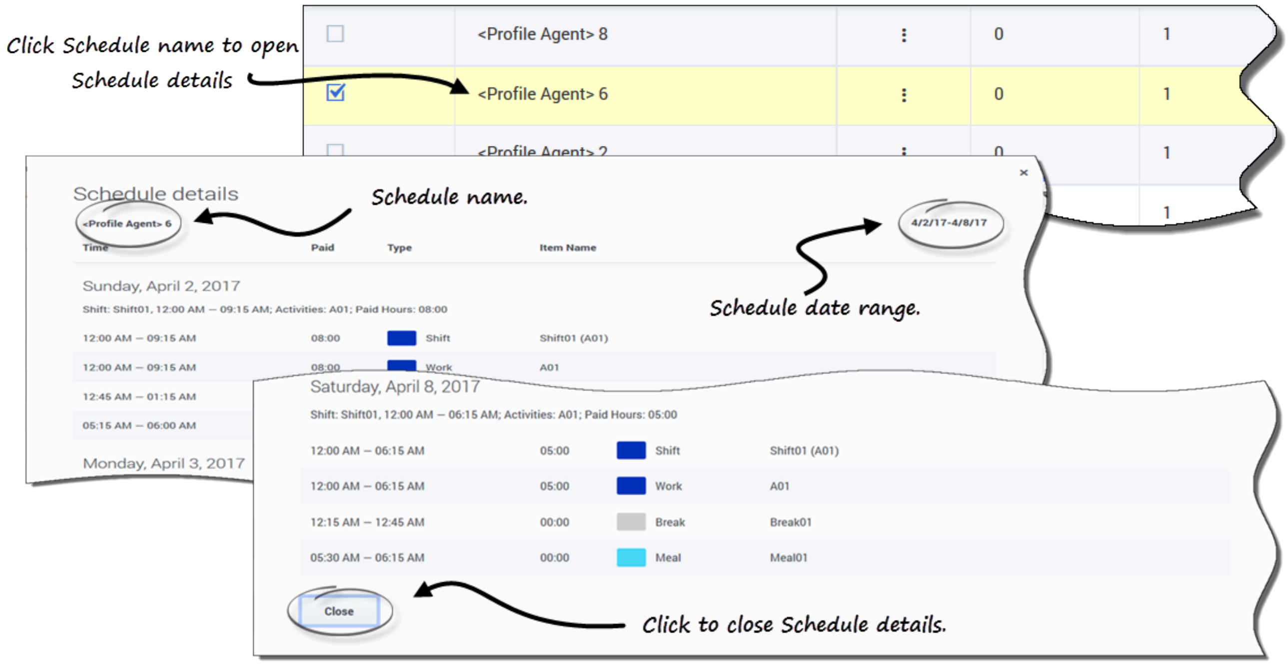
- In the **Dates** column, click the arrow to view the number of weeks in a particular schedule. Schedules can cover one week or multiple weeks. The table expands to show a row for each week in the schedule, numbering them consecutively (Week1, Week2, etc). Click the arrow again to hide the week(s) in the schedule.

To view days in a week:

- In the **Dates** column, click the arrow to view the days in a particular week. The table expands to show more rows; one for each day in the week. Click the arrow again to hide the days in the week.

Viewing schedule details

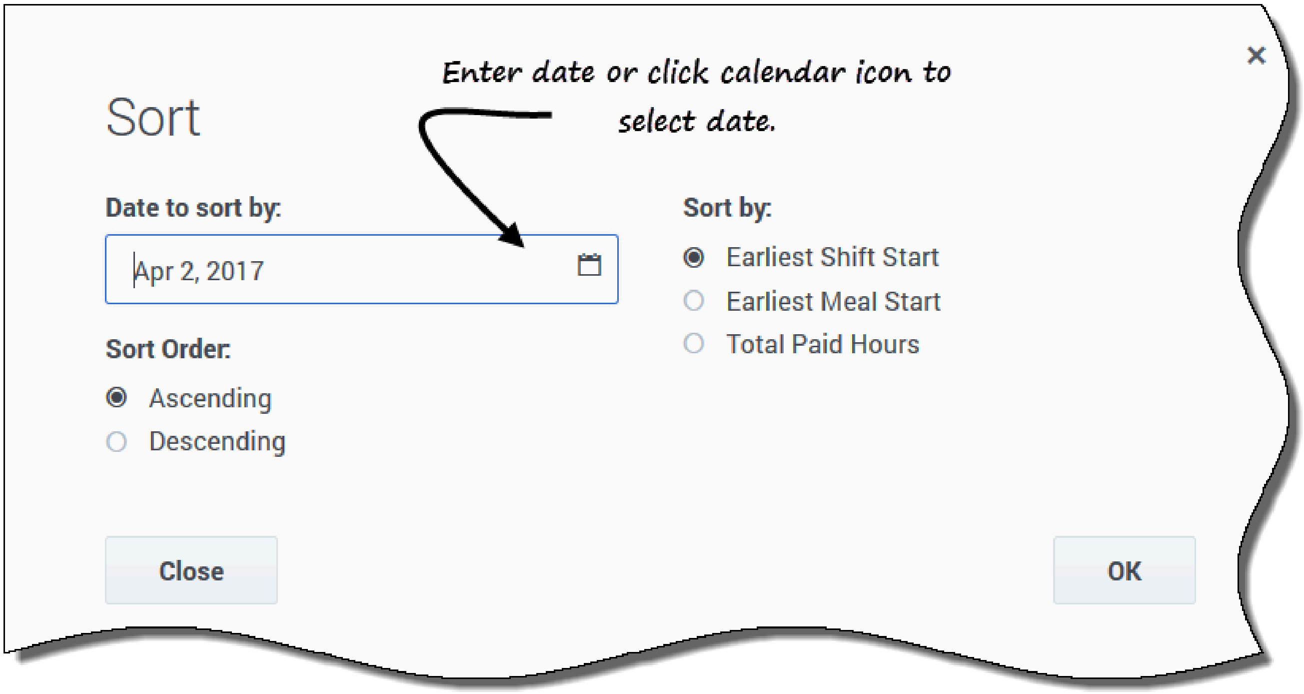
When the grid is expanded to show a row for each week in a schedule, you can hover over the schedule name or a week name to open the schedule details for that period. If you click the name of a schedule that contains multiple weeks, the display will show the details for multiple weeks.



Clicking the **Schedule name** or **Week name** link presents a breakdown of all scheduled items, such as start/end times, paid hours, type, and item name, as well as scheduled activities, meals, breaks, and total paid hours.

Sorting shifts in schedules

Use the **Sort** dialog to display the available schedules in the **Bidding Assignment** view in a particular order:

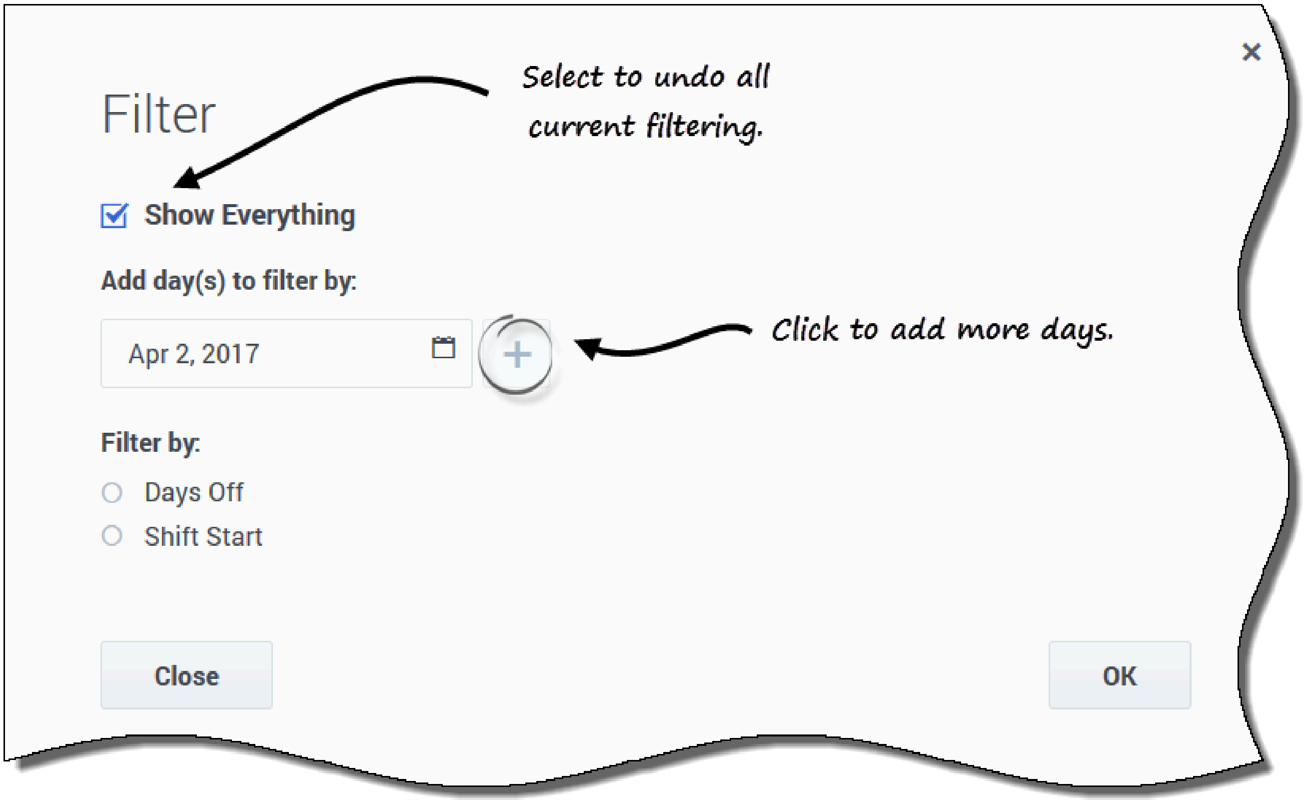


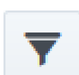
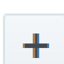
1. Select the schedule that you want to sort by entering a check mark in the first column of the grid.
2. Click **Sort** .
   The Sort dialog opens.
3. In the **Date to sort by** field, enter a date or select a date from the calendar.
4. Select one of these radio buttons:
   - **Earliest Shift Start**—Sort by shift start time (default). Days Off are listed after all schedule days with shifts.
   - **Earliest Meal Start**—Sort by first meal start time. Schedules which contain shifts without meals are listed after all schedules which contain shifts with meals.
   - **Total Paid Hours**—Sort by total weekly paid hours.
5. Select a sorting method: either **Ascending** or **Descending**.
6. Click **Ok** to save the changes or **Close** to close the dialog without saving.

See also, Managing your schedule bid assignments.

Filtering shifts in schedules

Use the **Filter** dialog to limit the display of available schedules in the **Bidding Assignment** view. Select days in the week and then a second filtering parameter that will apply to schedules that have shifts on those days.



1. Select the schedule that you want to filter by entering a check mark in the first column of the grid.
2. Click **Filter**  .
3. In the Filter dialog, do one of the following:
   - Select **Show Everything** to display all schedules and undo all current filtering.
     This is the default setting when the dialog opens.
   - Enter dates in the **Add days(s) to filter by** field or select them from the calendar.
4. Click  after each selection to add more days.
   - **Your next selection(s) will apply only to schedules that have shifts on the selected days.**
5. Choose one of two radio buttons:
   - Select **Days Off** to display only schedules that match the full days off that you select.
   - Select **Shift Start** to display only schedules with shifts that start no earlier than your **Earliest Start Time** setting and no later than your **Latest Start Time** setting, on your selected days.

6. Click **Ok** to save the changes or **Close** to close the dialog without saving.

Filter by Desired or Unwanted list

Another filter enables you to view only the lists you want to see. The drop-down list beside the **Filter** icon shows **All** (all lists), by default. However, you can view the Desired list only, or the Unwanted list only, by selecting them from the list.

Managing your schedule bid assignments

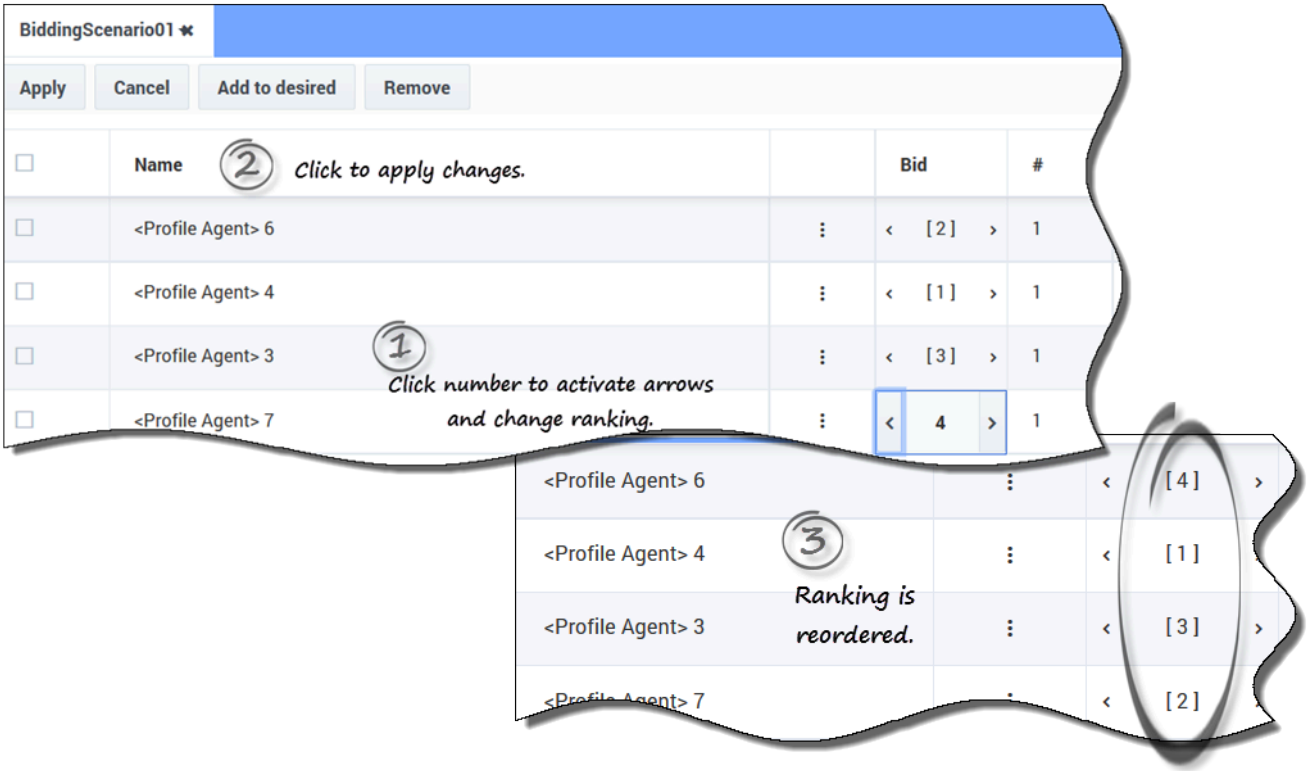
After entering your bids, if you want to change them for schedules you marked as **Desired** or **Unwanted**, you can do so by using the drop-down list (beside the **Filter** icon) in the scenario. After selecting **Desired** or **Unwanted** in the list, you can also change the ranking of your bids, if necessary.

As an agent, you can only access a bidding scenario for a specific period of time, which is known as the *bidding window*. The bidding window closes on the date and time that is shown in the **Bidding end time** column for each scenario in the **Scenarios** view. To change your bids and/or reorder the ranking, you will have to do it before the **Bidding end time** expires.

Hover your mouse over the **Scenario name** and click the link to open a scenario for which you have entered bids. This is where you manage your existing bids and reorder their ranking, if necessary.

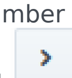
Changing bid rankings

Your bids are already ranked when you reach this view; that happened when you clicked **Add to Desired** or **Add to Unwanted** in the scenario. Your most desired bid is numbered 1 and your most unwanted bid is [1].



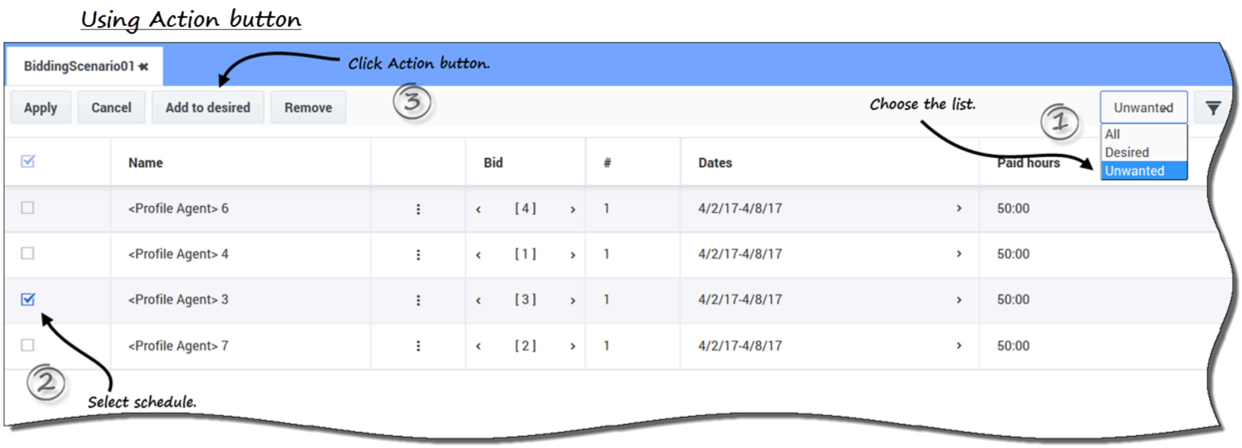
To change a single bid in an open scenario:

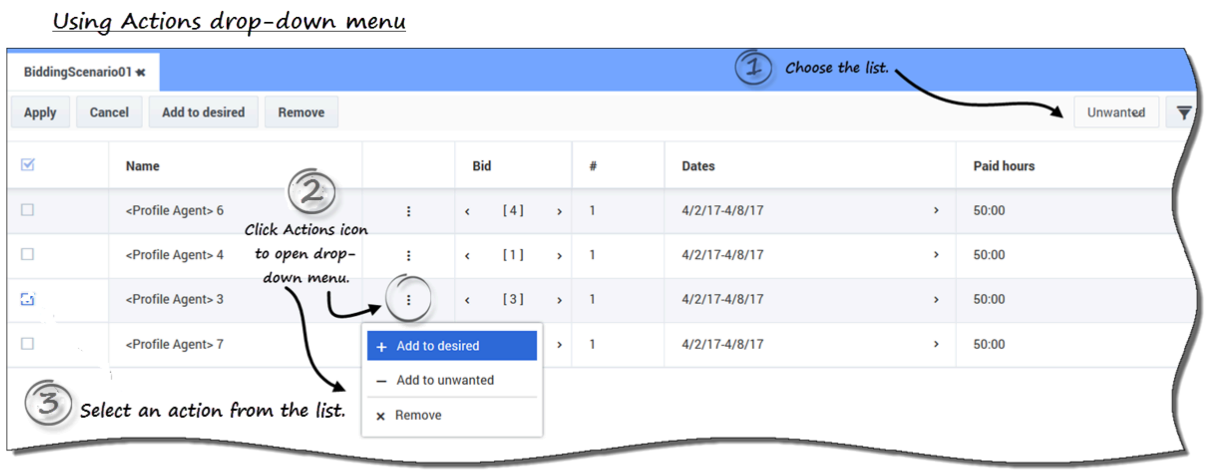
1. Click the **All** drop-down arrow (near the **Filter** icon) to select the list you want to change: **Desired** or **Unwanted**.
2. In the **Bid** column, click the number in the row for the schedule that you want to change.

   The back  **and forward**  **arrows become active.**
3. Click the arrows to select the new ranking for this schedule.
4. Click **Apply**.
   WFM changes the numbers for the rest of your bids accordingly.
5. Repeat as necessary to achieve the bid order that you want.

Moving bids to another list

In an open Scenario view, use the **All** drop-down list (next to the **Filter** icon) or the icon in the **Actions** column to move your bids for schedules from the Desired list to the Unwanted list, or from the Unwanted list to the Desired list. You can move bids in two ways:





- By using the action buttons:
  1. In an open scenario, click the down arrow in the drop-down list to select the either **Desired** or **Unwanted**.
  2. Select the check box in the far-left column for every schedule that you want to move to another list.
  3. Click **Add to desired** or **Add to unwanted**, depending on which list you selected in step 1.
     The remaining bids in this list are reordered, accordingly.
- By using the **Actions** icon:
  1. In the open scenario, click **Actions** icon in the row for the schedule you want to change.
  2. When the drop-down list opens, select **Add to desired** or **Add to unwanted**, depending on which list you selected in step 1.
     The remaining bids in this list are reordered, accordingly.

Removing schedules from a list

You can remove one or more schedules from a list in two ways:

> **Tip**
> See the graphics in Moving bids to another list, as the steps in these two methods are similar.

- By using the action button:
    1. Click the **All** drop-down list to select the list you want to change: **Desired** or **Unwanted**.
    2. Select the check box in the far-left column for every schedule that you want to remove from the list.
    3. Click **Remove** to remove the selected schedule(s).
       This action sets the bid ranking for the schedule(s) to `0` and reorders the remaining bids in this list, accordingly.
- By using the **Actions** icon:
    1. In the open scenario, click **Actions** icon in the row for the schedule you want to change.
    2. When the drop-down list opens, select **Remove**.
       The schedule is removed from the list and remaining bids are reordered, accordingly.

Bidding on overtime

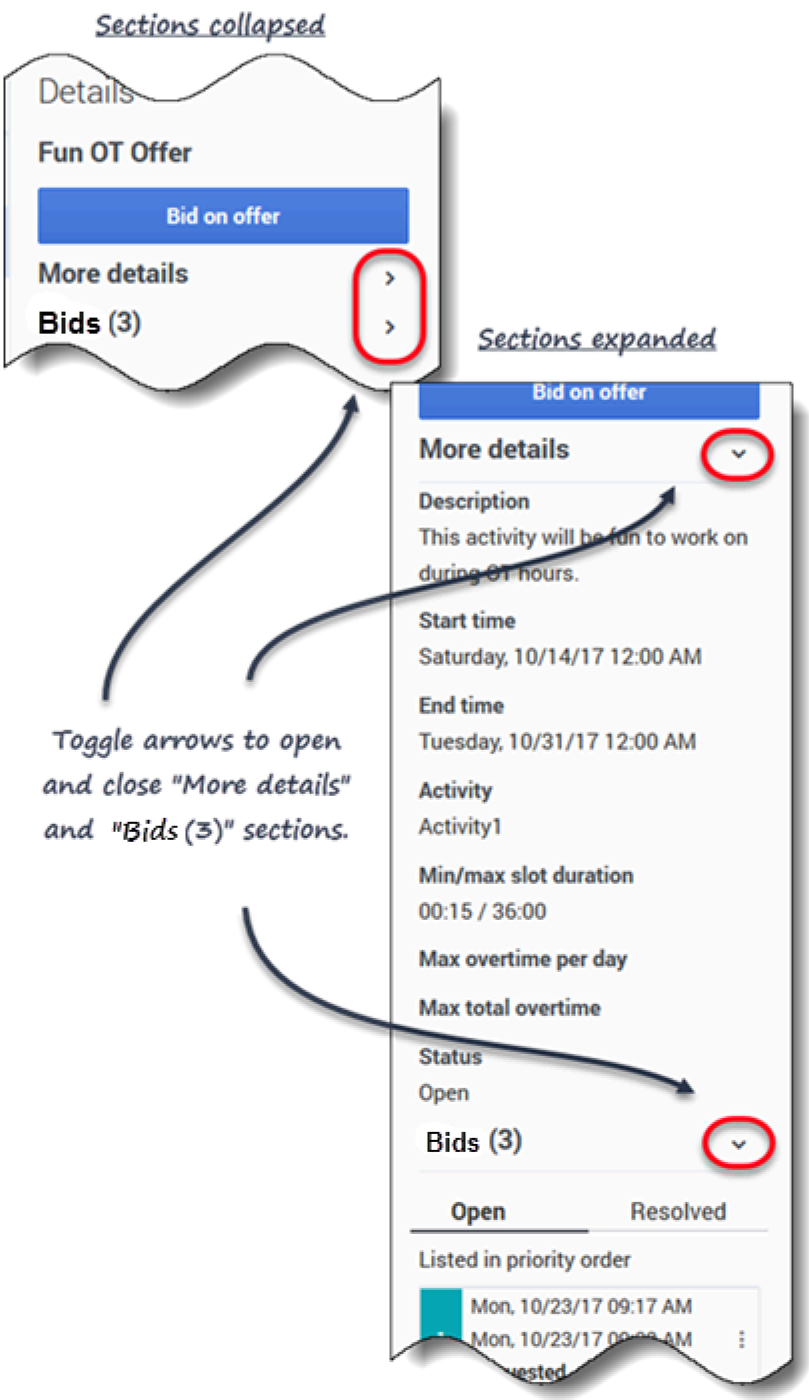
If you want to work overtime, WFM enables you to bid on overtime slots presented in Overtime Offers. View Overtime Offers that are open for bidding by clicking **Bidding** > **Overtime**. You can access overtime offers only after they've been marked "open" by a supervisor. If you do not see Overtime offers listed in this view, either none exist or none are open.

Each row in this view displays one overtime offer and information about each offer is presented in these columns:

- **Overtime bid**—The name of the overtime offer.
- **Activities**—The activity associated with the overtime offer that you will work on.
- **Start time**—The start date and time of the offer.
- **End time**—The end date and time of the offer.
- **Status**—The status of the overtime offer, either **Open** or **Closed**.
- **Bids**—The number of time intervals or slots you bid on in an overtime offer.

The start and end date/time are in the your timezone.

Viewing the offer details

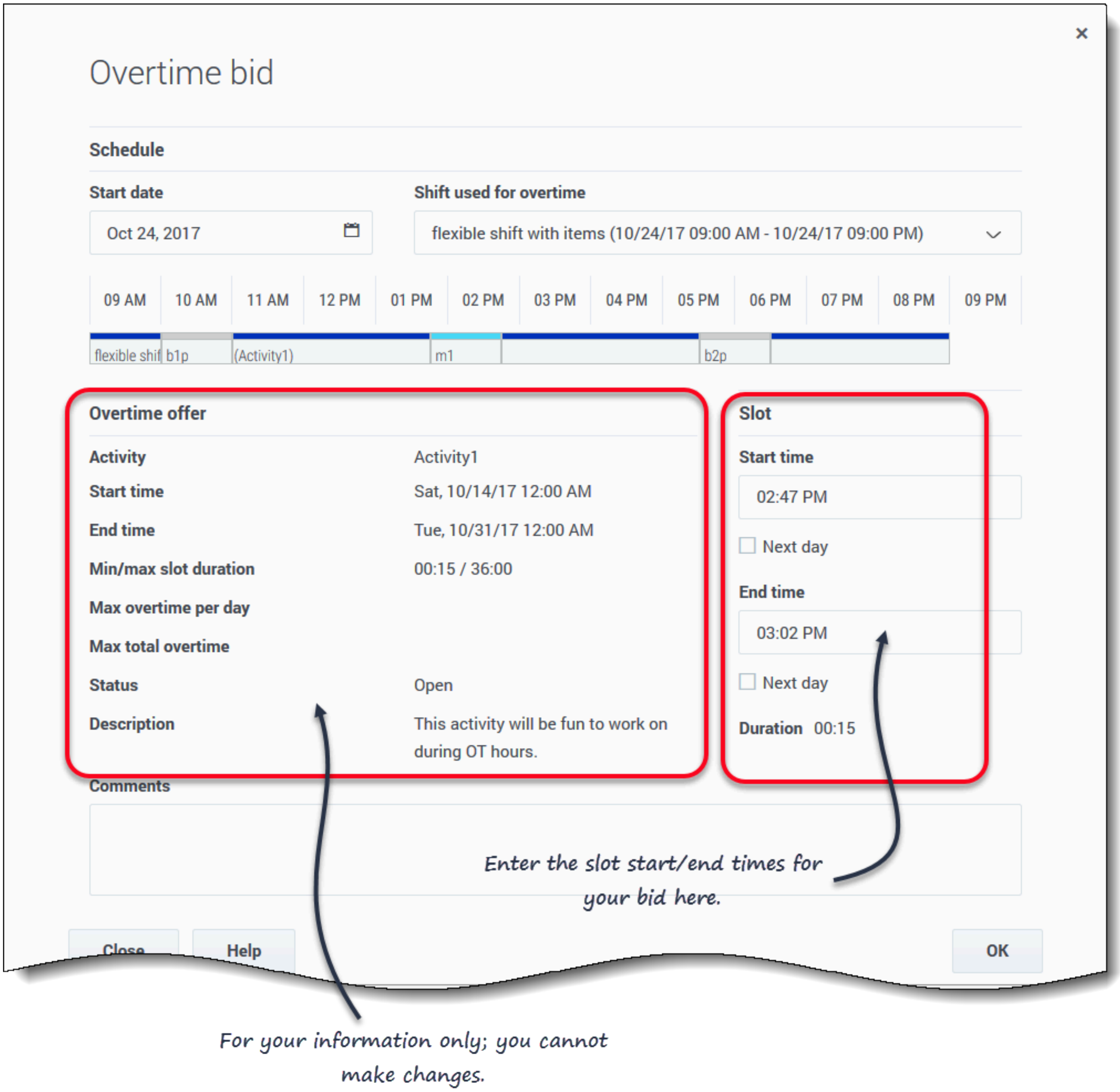


To view the overtime offer details:

1. Select the row that contains the overtime offer you want to bid on.

2. Click inside any column.
   The Details right-side pane opens showing
   - **A description of the offer**
   - **The start date and time**
   - **The end date and time**
   - **The current number of requests**
   - **The status of the request:Open or Resolved**
3. Use the arrows (see graphic) to toggle the **More Details** and **Requests** sections opened or closed.

Creating overtime bid requests



To bid for overtime slots:

1. In the right-side **Details** pane, click **Bid on Offer**.
   The Overtime bid dialog opens.
2. In the **Start date** field, click the calendar icon to select the date on which you work ovetime.
3. In the **Select shift** field, select a shift.

4. In the **Start time** field, enter the start time for the overtime slot you want to work.
5. In the **End time** field, enter the end time for the overtime slot.
If the start or end time occurs the next day, click the appropriate Next Day check box.
6. In the **Comments** field, enter any comments relevant to this request that you might want your supervisor to know.
7. Click **OK**.

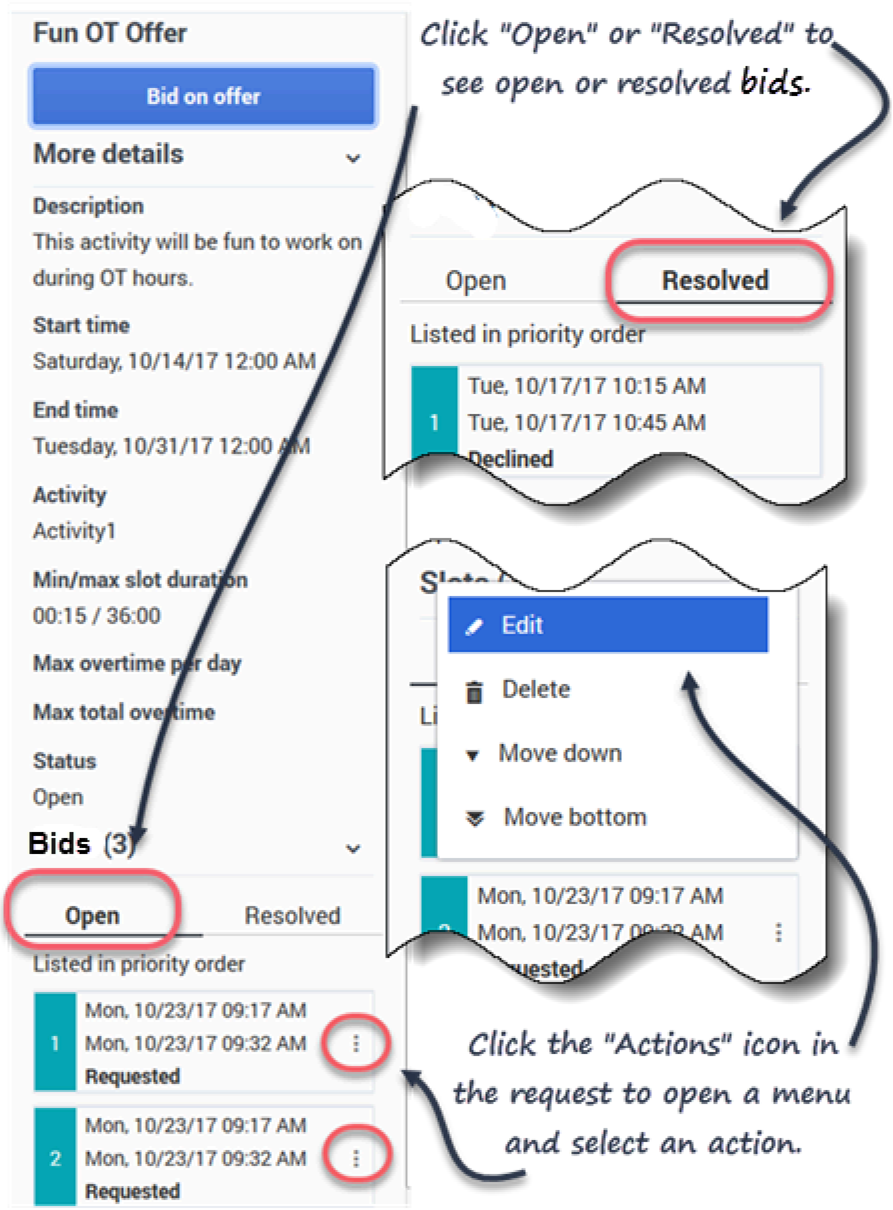
You can enter overlapping time intervals or slots in your requests. To change the priority of your bids, see Moving bid requests.

Tip

The Bid information section contains the Overtime offer details. It is for your information only; you cannot change it.

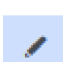
Managing your bid requests

At some point you might have more than one or two pending requests for overtime. That means you'll want to either edit, delete or change the priority of (move) some of them. Use the procedures in this section to perform these tasks.



Editing bid requests

To edit your existing overtime bids:

1. In the request you want to edit, click **Action** .
   A menu list opens.
2. Select **Edit** .

3. When the **Overtime bid** dialog opens, make the necessary changes.
4. Click **OK**.

Deleting bid requests

To delete your overtime bids:

1. In the request you want to delete, click **Action**.
   A menu list opens.
2. Select **Delete** .
3. When the **Confirmation** dialog opens, click **Yes** to delete the request or **No** to cancel the action.

Moving bid requests

To change the order of your overtime bids:

1. In the request you want to move, click **Action**.
   A menu list opens.
2. To move the request up or down one position, select **Move up** or **Move down**. To move the request to the top or bottom of the list, select **Move top** or **Move bottom**.
   WFM renumbers the other requests accordingly.

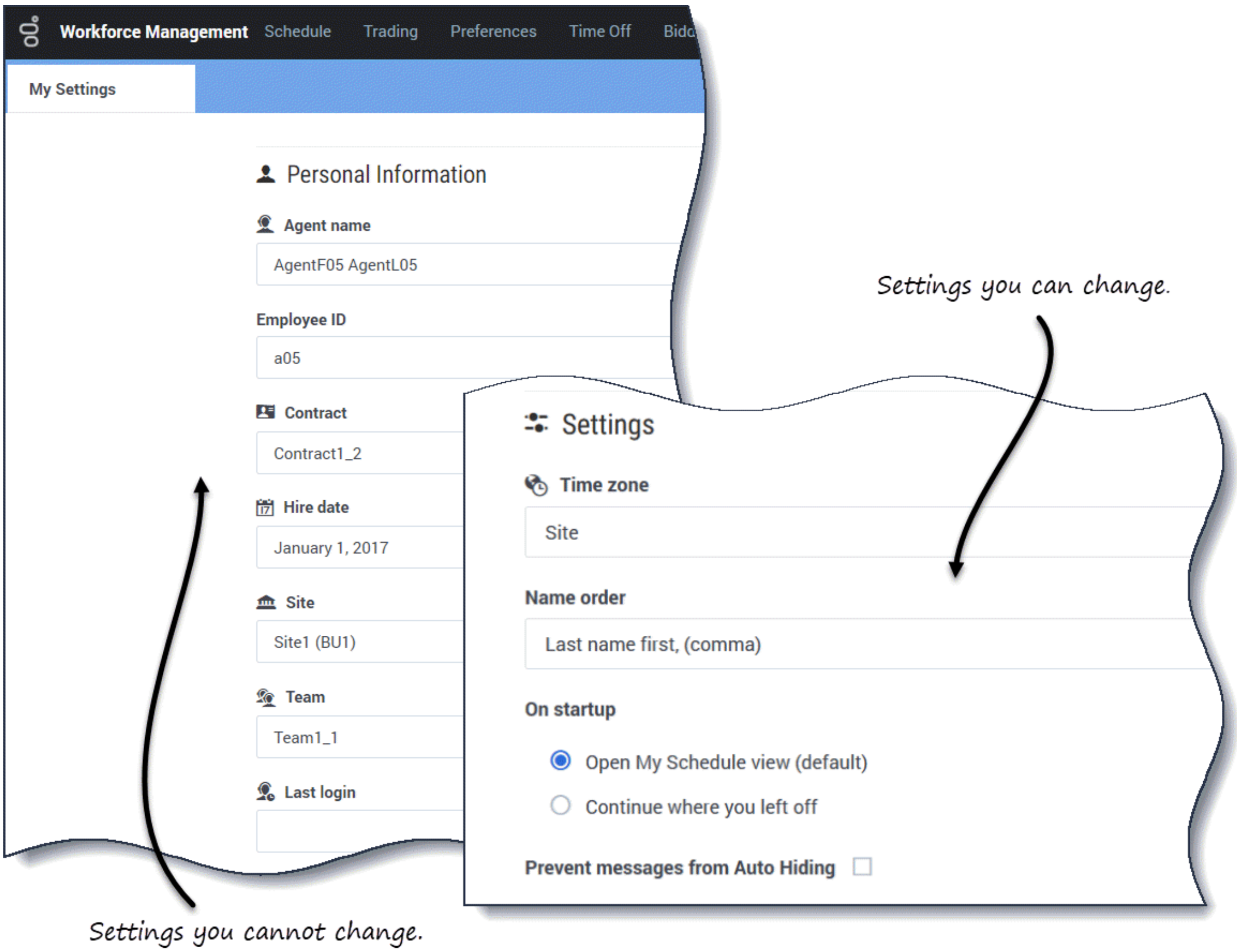
Configuration

The views in the **Configuration** module provide access to your personal information, shared transport arrangements, and the schedule exception totals. Click **Configuration** to reveal the drop-down menu that lists the views in this module:

- My Settings
- My Shared Transport
- Browse Shared Transport
- Exception Totals

Viewing my settings

The information in this view is displayed in two sections: **Personal Information** and **Settings**.



The **Personal Information** section includes: your name, employee ID, contract, hire date, site (business unit), team, and date/time of your last login.

You cannot change any of this information. If your supervisor changes something, WFM updates this information accordingly.

The **Settings** section includes:

- **Time zone**—Keep the site time zone (default) or change it to your current one.
- **Name order**—Change the order of your name, whichever order of the three you chose (**First name first** [default], **Last name first**, or **Last name first, separated from first name with a comma**) that is how it will appear in the interface.
- **On Startup**—Change the view that you prefer to see at startup. The choices are: **Open My Schedule view** (default) or **Continue where you left off**.
- **Prevent messages from auto-hiding**—Check this box to prevent error, confirmation, or validation messages from disappearing after 5 seconds. When checked, message dialogs remain open until you click **Close**.

If you select a time zone other than the default (**Site**) option, the **Schedule**, **Trading**, **Preferences**, and **Time Off** modules display information, based on your selection.

Tip

WFM is a web-based application so any modifications you make to the **Time zone**, **Name order**, and **On Startup** settings are saved in the browser cache. If the administrator or someone in your contact center has set restrictions on how your browser performs caching, your changes might not be saved and you will have to change the settings every time you log in. This might also be the case if you log in to WFM using a different browser than the one you used to save the settings, or if you are using an older browser version, such as Internet Explorer 7.

Using shared transport

Use the My Shared Transport and Browse Shared Transport views to manage your participation in shared transport. You can create your own shared transport or join an existing one. Shared transport can be a company bus or a carpool arranged by a group of agents.

Tip

Shared Transport is known by many different names worldwide—bus, carpool, ride share, lift share, and paratransit, for example. See Wikipedia for details.

My shared transport

Use this view to create shared transport, view join requests from others, or leave shared transport. You can also switch to the Browse Shared Transport view if you have not already created a shared transport.

Tip

Creating a new shared transport deletes all of your pending join requests. You can belong to only one shared transport at a time.

Creating shared transport

To create shared transport:

1. In the My Shared Transport view, click **Create**  to open a separate view, enabling you to enter the following shared transport details:
   - In the **Shared Transport Name** field, enter the name of the new shared transport.
   - In the **Comments** field, enter descriptive comments, if any.
2. Click **Save**.

After you save the shared transport, two other buttons appear:

- Leave transport—Enabling you to leave or cancel this shared transport.
- Join requests—Enabling you to view join requests from others for this group.

The shared transport and related information is added as new record in **Browse Shared Transport** table with a status of Confirmed. You are automatically added as a participant.

Editing a shared transport group

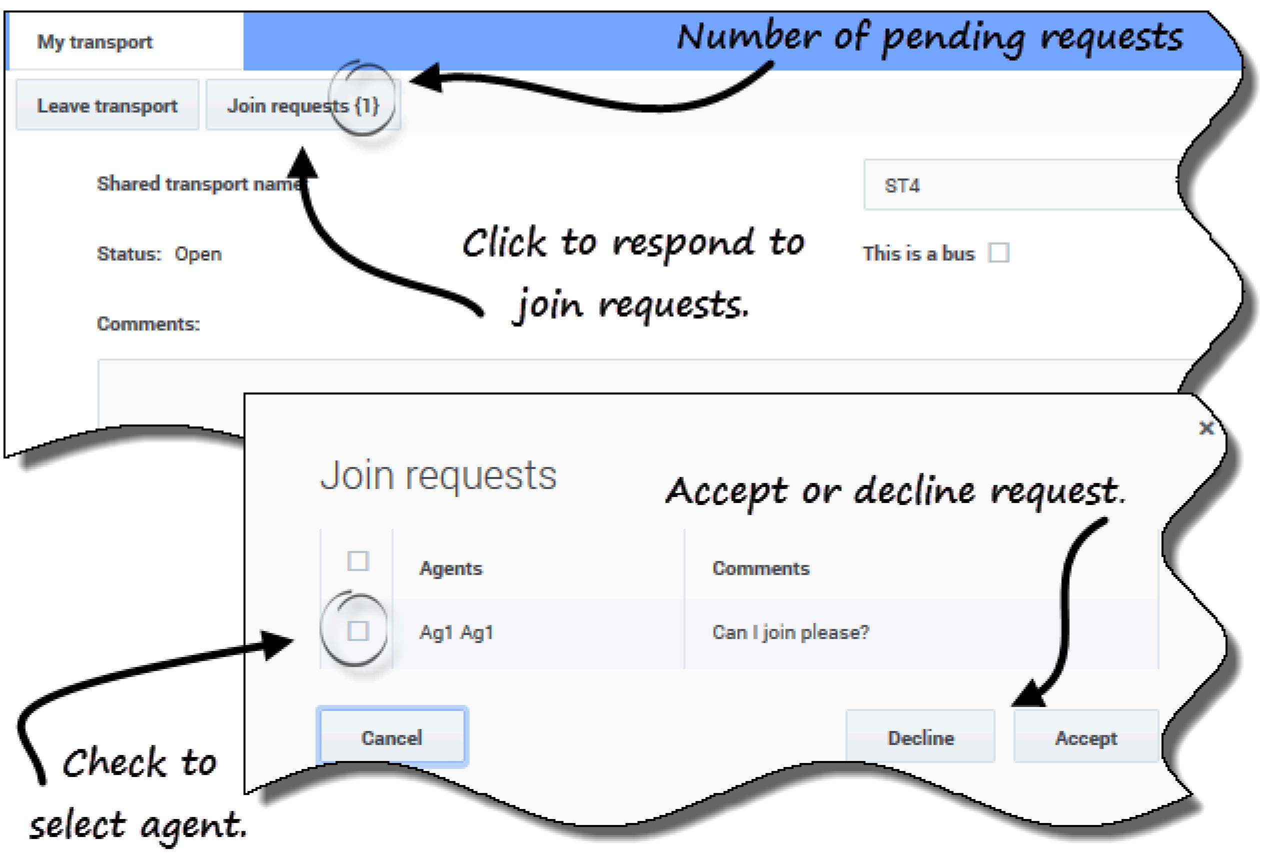
You can change some of the properties in a shared transport that you created, such as the shared transport name or the comments.

To edit shared transport:

1. Click **My Shared Transport**.
2. When the view opens, change the properties, as required.
3. Click **Save**.

Accepting and declining Join requests

If you have created shared transport for carpooling, you will receive requests from other agents to join your group.



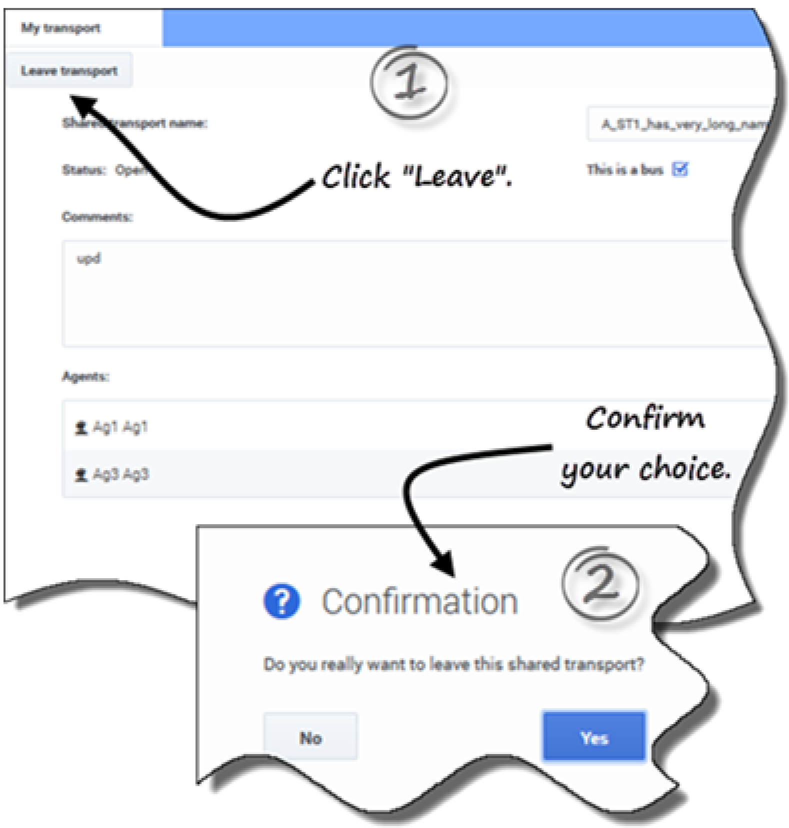
To respond to join requests:

1. In the My Shared Transport view, click the **Join requests** button.
   The number in brackets indicates the number of pending requests.
2. When the **Join Requests** dialog opens, click the check box beside the agent's name.
3. Click **Decline** or **Accept**.

For example:

- You receive requests to join from Agent1 and Agent2.
- You accept Agent1's request and decline Agent2's request.
- Agent1 sees the status **Confirmed** in the Browse Shared Transport view for this transport group; Agent2 sees the status **Declined**.

Leaving shared transport



To leave shared transport:

1. In the My Shared Transport view, click **Leave transport**.
   A Confirmation dialog box opens.
2. Click **Yes** to leave the group or **No** to cancel this action and stay in the group.

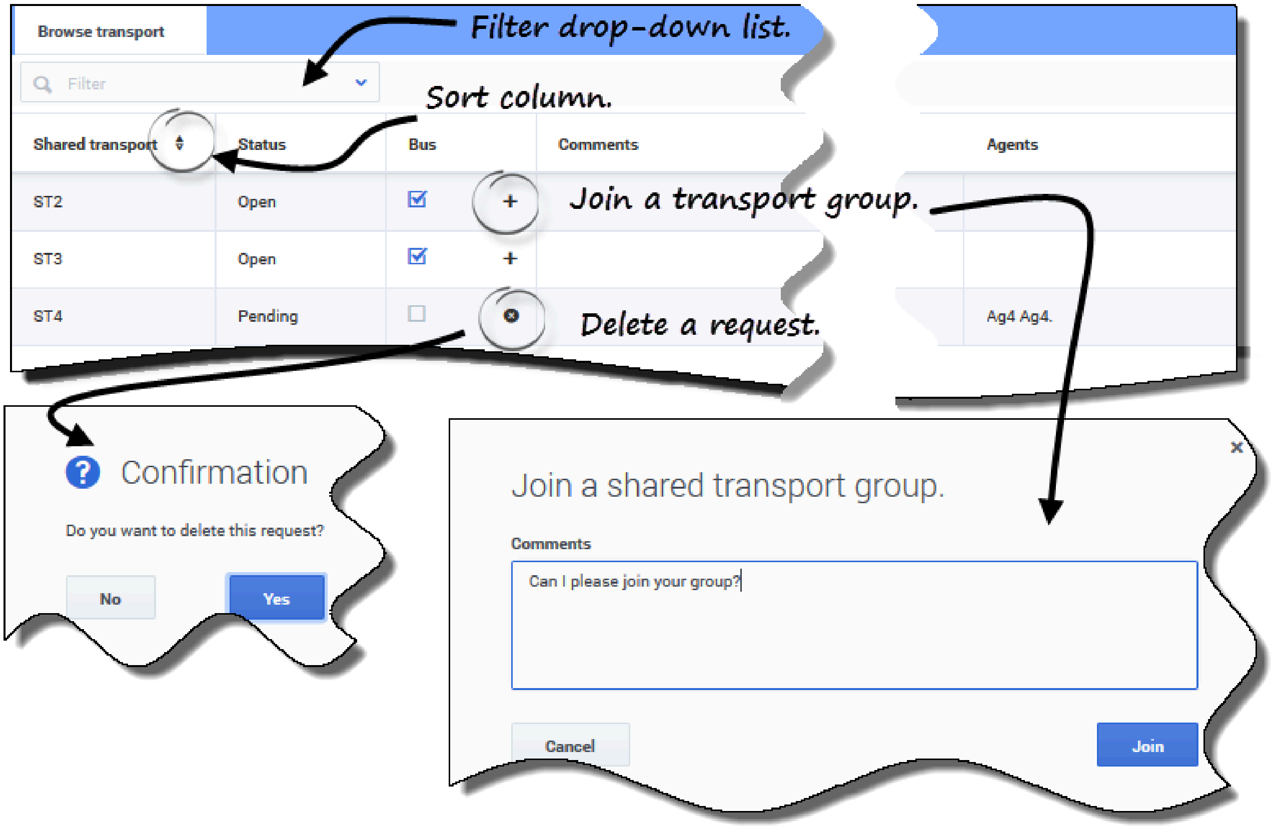
Browsing shared transport

Use the **Browse Shared Transport** view to browse existing shared transport in a table format with these columns and fields:

- **Filter by**—Select Shared Transport Name, Agent's First Name, or Agent's Last Name from this drop-down menu. You can also enter search criteria in this field. Leave this field empty to show all shared transport.
- **Shared transport**—The name of the shared transport. Use the **Sort** controls  to sort this column in ascending or descending order.
- **Status**—The shared transport status (open or closed). An open status indicates that this shared transport is open for new requests. A closed status indicates that it is closed to new requests. **The Status column also contains the status of the agent’s join request (confirmed, pending, or declined).**
- **Bus**—When selected, the check boxes in this column specify a bus as the mode of transportation provided by company. (Agents are driven to work by company bus.) Only supervisors can create groups with Bus checked. When unchecked, it means a carpool (created by the agents) is the mode of transportation
- **Actions**—Clicking the icons in this column enables you to join shared transport, leave it, or delete your request to join.
- **Comments**—View comments in this column that are associated with the shared transport.
- **Agents**—This column contains a list of the participants in the shared transport.

Requesting to join shared transport

You can create join requests in the **Browse Transport** view.



To request to join shared transport:

1. In the Actions column, click the **Join** icon in the appropriate row.
   A Join shared transport dialog opens.
2. In the Comments field, enter any comments related to this join request.
3. Click the **Join** button (or click **Cancel** to cancel the action).
   The status of this shared transport changes to Pending.

Deleting requests to join

You can delete join requests in the **Browse Transport** view.

To delete join requests (see the figure in Requesting to join shared transport):

1. In the **Actions** column, click the **Delete** icon in the appropriate row.
   A Confirmation dialog opens.
2. Click **Yes** to confirm the deletion or **No** to cancel the action.

You can leave your current shared transport by clicking Leave transport. If you are the only participant and the shared transport is not a bus, it is removed from the table and you are no longer a participant. If the shared transport has other participants it is not removed from the table.

Viewing exception totals

Use the **Exception Totals** view to see the sum of the duration (total hours) for a selected Exception type over a selected date range. You do not define exceptions in this view, but only filter the display. To add an exceptions, see Adding exceptions to your schedule.

Viewing total hours for exceptions

To view total hours for an exception:

1. In the **Exceptions** field, select an exception type from the drop-down list.
2. In the **Start Date** and **End Date** fields, enter a date range or select one from the pop-up calendar.
3. Click **Show**.
   Total hours are displayed, along with the selected Exception type and selected date range.