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Workforce Management Web for Agents Help (Classic)

[Preferences](#)

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Preferences

First, find out why you would use Preferences. See [Preferences and Patterns](#).

The Preferences window displays two tabs, Preferences Overview (the default) and Availability Patterns. Use the **Preferences Overview** tab (click the title) to:

- View your preferences for shifts, exceptions, days off, working hours, time off, and availability.
- Add, modify, or delete your preferences for [shifts](#), your [availability](#) or [days off](#).
- 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 or Exceptions

Each day's bar in the Preference Overview pane's Weekly Preferences grid shows preferences and exceptions as segments covering the preference or exception timesteps. The Legend indicates which colors represent exception and preference statuses.

In the Weekly Preferences grid, you can view the status of each day off, for which you made a Day Off preference. Most cells in the Day Off column will be empty, except the actual days for which you created a preference. In those cells, one of three Day Off statuses will appear: Scheduled, Preferred, or Granted.

Use the [Availability Patterns](#) pane (click the title) to:

- Create, modify, or delete availability patterns.
- Create availability preferences based on availability patterns.

The **Preferences Overview** pane has three main sections:

TOP—Preferences Overview link and Availability Patterns link on the left side, Weekly Preferences Grid beneath them and across the full width of the display.

MIDDLE—A Legend identifies the colors used in the Weekly Preferences Grid.

BOTTOM—The Daily Preferences table summarizes your preferences and preference status on each day. It contains a row for each week day and the following columns:

Column	Description
Date	The date of the indicated day.
Weekday	The day of the week.
Preference	The names of the preferences and exceptions for each day.
Start time	When each preference or exception is requested to begin. (For a Day Off, this column is empty.)
End time	When each preference or exception is requested to end. (For a Day Off, this column displays "Full Day".)
Paid time	The number of paid hours in each preference or exception.
Status/Reason	<p>Status: whether each preference is Preferred, Granted, Declined, Scheduled, or Not Scheduled. See Preference Statuses and Hierarchy for an explanation of these statuses.</p> <p>Reason: Why WFM assigned a status such as Declined or Not Scheduled to the time-off item.</p>
Comments/Memo	If any item shown in this list has a comment/memo associated with it, the comment/memo appears in this column.

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.
- A **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.

Hierarchy of Preferences

1. Granted full-day exceptions.
2. Granted days off.
3. Granted full-day time off.
4. Granted availability.

5. Granted shifts.
6. Granted paid (working) hours.
7. Granted part-day exceptions, granted part-day time off.
8. Rotating patterns.
9. Preferred items (including exceptions, paid hours, and time off with preferred status).

Important

If you do not see Preferences in the menu bar, then Schedule Preferences are not enabled for your contact center.

Graphical Hierarchy

The graphical hierarchy differs from the status resolution hierarchy. The Preferences graph displays the following hierarchy, top to bottom:

- Full day Exception
- Time off
- Availability
- Part day exception
- Shift
- Working hours

Granted or Scheduled items are shown on top and Preferred items (of the same type) are shown below them.

Editing and Deleting Preferences

Use the following procedures to edit or delete a preference from the Weekly Preferences grid or Daily Preference list in the **Preferences Overview** pane.

When editing preferences, take note of the following:

- When editing preferences, you cannot change the date.
- If WFM can schedule your preference, the revised preference appears in the Preferences window.
- If an Availability preference cannot be edited, a warning is displayed after the **Edit** dialog closes and the preference remains unchanged.
- If a Shift preference cannot be edited, a warning is displayed and the **Edit** dialog stays open, enabling you to change the data.

- Available shift start times can differ, if a time zone, other than site time zone, is selected.
- When adding a shift to your preferences, you will see fewer available start times or possibly no applicable start times, depending on the time zone you selected. In this case, 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.

Editing Preferences

To edit a preference in the Preferences Overview pane:

1. Click the preference you want to edit.
2. Click **Edit**.
3. When the dialog window opens, make the appropriate changes and click **OK** to submit the entry, or **Cancel** to discard it and close the dialog window.

Deleting Preferences

To delete a preference, select the preference you want to delete and click **Delete**.