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Workforce Management Supervisor Help

[Change Preference Status](#)

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Change Preference Status

Use the Calendar Items module to change the status of an agent's **preference**, **exception**, **time off**, or working hours (shift and availability) request prior to publishing the schedule.

- Before you publish the schedule, the possible actual status settings are **Preferred**, **Granted**, and **Declined**.
- After you publish the schedule, the possible actual status settings are **Scheduled** or **Not Scheduled**.

Preference Statuses

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 will appear 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 will not appear in the schedule unless it was 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 may appear in the schedule if it complies with the scheduling constraints and optimization settings that are configured for your site.

Two columns in the **Calendar Items** module show the preference status: **Status Requested** and **Status Actual**. See **below** for an explanation of the two categories.

To change the status of a not-yet-scheduled item:

1. In the **Calendar's item** column, click the name of the item you want to change.
2. Click an action button for the item's new status: **Prefer**, **Grant**, or **Decline**.
3. Click **OK**.
The new status appears in the **Status** columns.

Important

The status can be different in each column, and the **Actual Status** can differ from the status that you just assigned. This is because of the way in which the **Requested** and **Actual Status** columns function, as explained below.

Requested Status vs. Actual Status

Requested Status and *Actual Status* refer to the two ways in which each exception and preference is saved.

- **Requested Status** is the preference's status as entered by the user. If more than one preference is entered on a particular day, each item is saved to the database with the status that it has when entered.
- **Actual Status** is the status as resolved by WFM. WFM evaluates all current exceptions and preferences based on their positions in the [calendar object hierarchy](#). If an agent has multiple preferences for a day, the **Actual Status** indicates how WFM has resolved them.

For example, if an agent prefers a full-day time off, that preference is saved in the database as **Preferred**. If the agent is then assigned (**Granted**) a meeting exception for that day, the exception overrides the preference. WFM evaluates the current set of exceptions and preferences, and notes the time-off preference as **Declined**. However, the database maintains the preference status as Preferred because, until a schedule is generated, the exception can be removed. In this case the preference would again take effect and the preference **Actual Status** would change to **Preferred**.

Tip

Rotating pattern assignments are **Granted** by default, so they do not need a separate status saved to the database.