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Workforce Management Web for Supervisors Help

Exception Types

Contents

- 1 Exception Types
 - 1.1 Creating Partial-Day Exceptions
 - 1.2 Using Time-Off Types Instead of Exception Types
 - 1.3 Trade Rules Associated with Exception Types
 - 1.4 Creating Exception Types
 - 1.5 Editing Exception Types
 - 1.6 Deleting Exception Types
 - 1.7 Copying Exception Types

Exception Types

Exception types define periods of time when agents are engaged in non-work activities, such as training or meetings. Each site configures its own set of exception types, based on its business requirements.

Creating Partial-Day Exceptions

Scheduler evaluates partial-day exceptions to see whether they are **Valid** or **Invalid**. Valid partial-day exceptions comply with the criteria that are listed in **Exception Type Properties** (below).

Partial-day exceptions must:

- Not conflict with a full-day exception or granted preference.
- Fall entirely within the agent's availability pattern as specified in the **Contract** module and (if applicable) within granted availability preference hours.
- Fall entirely within activity hours of operation for activities the agent can perform.
- Fall entirely within at least one compatible shift's start and end times and be compatible with the meal settings for that shift.
- Not overlap the start or end time for another partial-day exception.

Exceptions with Payback

WFM supports exceptions with payback to enable agents to make up for work time lost due to lateness events or personal appointments. If agents in your contact center are given appropriate permission to use this feature, they (and you) can insert payback exceptions into an existing schedule.

You can insert these exception types when modifying individual agent schedules. See the [Insert Exception with Payback Wizard](#) in the **Schedule > Intra-Day** view. Agents can insert payback exceptions in the **My Schedule** or **My Schedule Details** view. See [Adding Exceptions To Your Schedule](#) in the *Workforce Management Agent Help*.

Using Time-Off Types Instead of Exception Types

The standard exception types that WFM creates when you choose the **Generate Default Schedule State Groups and exception types** while importing a site include several that represent various

types of time off. These exception types, and the **Exception is Used as Time Off** setting, are included for backward compatibility only.

For example, the standard exception types include **Time Off**, **Holiday**, **Sick Day**, and **Personal Day**. These time-off exception types are comparatively inflexible and cannot be associated with time-off accrual rules. For this reason, time-off types are the preferred way to configure the various kinds of time-off periods you use.

Genesys recommends that you configure all types of time off using the **Time-Off Types** module instead of configuring them as exception types.

Tip

Supervisors can also enter time off as preferences in WFM Web's **Calendar** module.

Trade Rules Associated with Exception Types

You can change which trade rule is associated with a specific **Exception Type**, but you cannot edit or delete a **Trade Rule**.

Creating Exception Types



Link to video

To create exception types, watch the video and/or follow this procedure:

1. In the **Policies** module, select **Exception Types**.
2. In the **Objects** pane, select the site(s) or business unit with which the new object will be associated.

Tip

You can select multiple sites (just keep clicking on them) but only one business unit.

3. Click **New** .
4. Configure the new object on each of the **Properties** and **Associated Sites** tabs.
5. When you are finished, click **Save** .

Editing Exception Types

To edit exception types:

1. Select the exception type in the **Exception Types** pane.
2. Make the necessary changes. See Exception Types **Properties** tab to find out how to configure these settings.

3. Click **Save**  .

Deleting Exception Types

To delete exception types:

1. Select the exception type in the **Exception Types** pane.

2. Click **Delete**  .

Copying Exception Types

To copy existing exception types:

1. In the **Exception Types** pane, select the exception type you want to copy.

2. Click **Copy**  .

3. When the **Copy Exception Type** pane opens, enter a name for the exception type.

4. In the bottom half of the pane, click the **Enterprise** list and select the business unit, to which you want to associate this exception type.

5. Click **Save**  .

Alternatively, click Close  to close this pane and cancel the action. If you do this, the exception type is not copied.