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Workforce Management Agent Help

Managing your preferences

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- Agent

Manage your preferred shifts, availability, and days off.

Related documentation:

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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.

Procedure continued...

1. In the **Shifts** drop-down menu, select a shift.
2. Select a **Start Time** in the drop-down list.
3. Enter an **End Time** and check **Next Day**, if applicable.
4. In the **Comments** field, enter any applicable comments.
5. 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 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.

Procedure continued...

1. In the **Start Time** field, enter the time that you want this availability preference to begin, including am or pm.
2. In the **End Time** field, enter the time that you want this availability preference to end, including am or pm.
3. Check **Next Day**, if applicable.
4. In the **Comments** field, enter any applicable comments.
5. 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.

Procedure continued...

1. In the **Comments** field for each preference, enter applicable comments.
2. Click **Save** (or **Cancel** to discard this preference) and close the dialog window.

Editing preferences

[Link to video](#)

To edit a shift, availability, or day off preference 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.

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- 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 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.