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Workforce Management Agent Help

[Preferences](#)

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- Agent

Set preferences for your availability, shifts, and days off.

Related documentation:

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What are preferences?

Workforce Management (WFM) enables you to set *preferences* for your availability, shifts, and days off. Enter any one of these preference types to let 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

The image shows a calendar interface for November and December 2016. In the November calendar, a preference labeled 'TOT1' is circled. An arrow points from this preference to a 'Details' dialog box. In the December calendar, a preference labeled 'Shift1' is circled. An arrow points from this preference to the same 'Details' dialog box. The dialog box displays the following information:

- Date: Dec 1, 2016
- Shift: Shift1 (09:15 PM-+03:00 AM, Paid Time: 05:45)
- Status: Declined (indicated by a black square icon)
- Message: Declined : The Shift (Shift1) hours are less than the Contract (C1) minimum daily paid hours.
- Buttons: Close

Handwritten annotations include:

- 'Availability and time-off preferences' with arrows pointing to the 'TOT1' and 'Shift1' items.
- '1. Click shift preference in calendar to open details dialog.' with an arrow pointing to the 'Shift1' item.
- '2. Shift preference details dialog opens' with an arrow pointing to the dialog box.

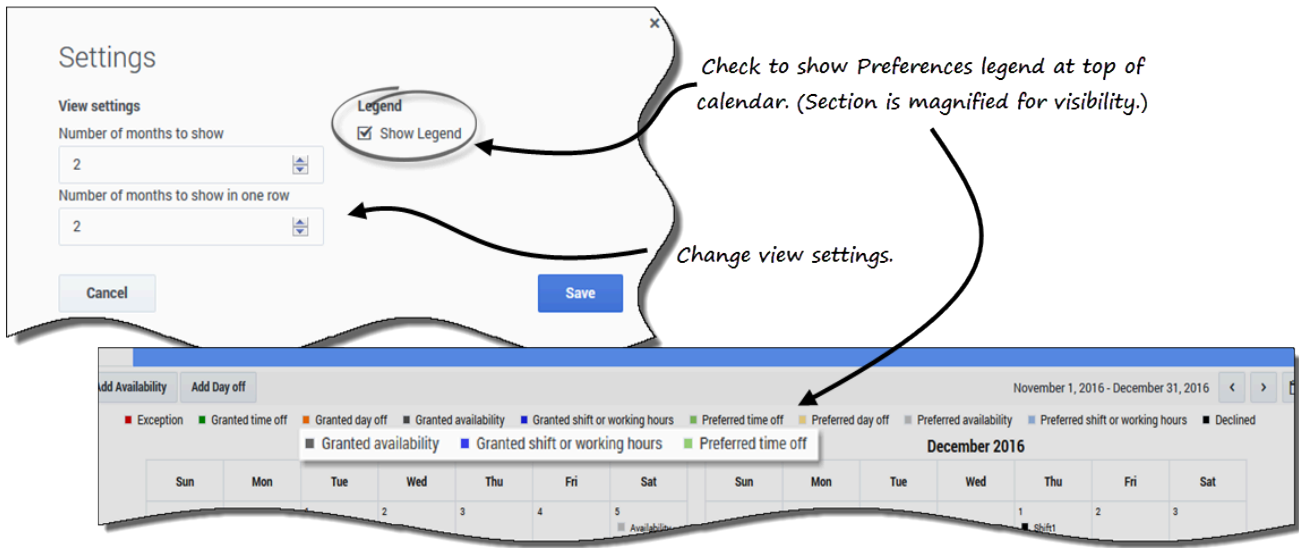
In the **Calendar** view, each item is marked with color representing its type and status.

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).

Changing the view settings

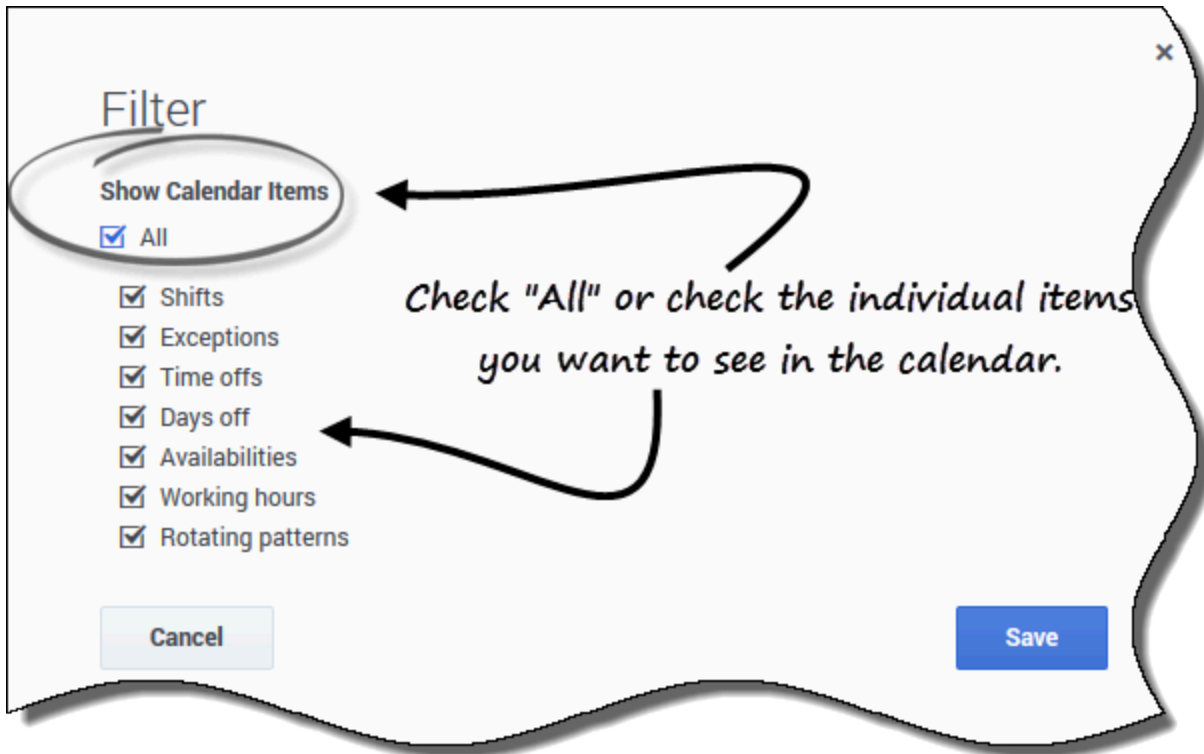
You can change the way you view information in the **Calendar** view by changing the settings to display only the current month (default) or multiple consecutive months, or display a legend that describes the color-coded statuses.



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 **Cancel**).

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.

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- 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.