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Workforce Management Web for Supervisors (Classic) Help

[Add Calendar Items Wizard](#)

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- Supervisor

Use this wizard to choose the activities and agents that will be associated with the calendar items you are adding. *Calendar items* are things like availability, days off, exceptions, shifts, time off, and working hours.

Related documentation:

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Using this wizard, you can add availability, time off, exceptions, days off, shifts, and working hours.

Tip

This wizard is available only to supervisors with the appropriate security access.

To use the wizard:

1. Select the **Calendar** pane.
2. Select **Calendar Items** from the **Views** menu.
3. Select an object from the Objects pane:
 - From the **Agents** tree: a business unit, site, team, or agent
 - From the **Activities** tree: a business unit, multi-site activity, site, or activity
4. Select a date or dates from the Calendar.
5. Click Get data.
6. Click the Add Calendar Item icon on the toolbar or select **Add Calendar Item** from the **Actions** menu.

For instructions on filling in each wizard screen, see Choose activities, Choose agents, and Choose calendar items.

Depending upon the choices that you make on the first two screens, you proceed to one of these screens:

- Add or Edit Start/End Time
- Add or Edit Exceptions
- Add or Edit Shifts
- Add or Edit Time Off

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- Comments

The last three screens can also appear when you edit **Calendar** items.

Choose activities

By default, only the activities and multi-site activities that were selected in the (lower) **Objects** pane when you chose Add Calendar Items are displayed, but all are selected.

1. Change the selections, if necessary.
2. Click **Next** to continue.

Tip

If you select objects from more than one site, the **Choose Calendar Item** page displays a limited list of calendar item types: **Availability, Day Off, Time Off, Exception, and Working Hours.**

See also: Add (or Edit) Calendar Items Wizard.

Choose agents

By default, the business unit, sites, teams, and agents that were selected in the **Objects** pane when you clicked the Add Calendar Items button are displayed and selected.

1. Change the selections, if necessary.
2. Click **Next** to continue.

Tip

If you select objects from more than one site, the **Choose Calendar Item** page displays a limited list of calendar item types: **Availability, Day Off, Time Off, Exceptions, and Working Hours.**

See also: Add (or Edit) Calendar Items Wizard.

Choose calendar items

To choose a Calendar Item:

1. Select an item from the **Calendar Item Type** group of radio buttons.
If you selected agents from more than one site on a previous page, then the list of calendar item types is limited to Availability, Day Off, Time Off, Exceptions, and Working Hours. Depending on your selection here, one of several different screens will appear next. If you select
 - **Availability**, the next screen is: Choose Start/End Time.
 - **Day Off**, the next screen is: Comments.
 - **Exception**, the next screen is: Choose Exception.
 - **Shift**, the next screen is: Choose Shift.
 - **Time Off**, the next screen is: Choose Time Off.
 - **Working Hours**, the next screen is: Choose Start/End Time.
2. Select an item from the **Requested State** group of radio buttons: **Preferred, Granted, or Declined. If you selected Working Hours or Exception, the required state is preset to Granted. If you grant a Day Off, Scheduler grants the day off regardless of the impact on service levels.**
3. Click **Next**.
If WFM Web cannot assign some selections, it opens a window that lists the agents, days, and reasons involved.

See also: Add (or Edit) Calendar Items Wizard.

Add or edit start/end time

To set the start and end time for availability or working hours:

1. Enter the **Start Time**. Either type the start time directly into the field or use the up or down arrow to select the time.
For Working Hours, your selections must fall within agent availability. For Working Hours with a status of Granted, your selections override a shift with Preferred status and set absolute working hours.
2. Enter the **End Time**, using the same options.
The Availability or Working Hours duration cannot exceed 36 hours.
3. Select **Next Day** if the **End Time** is on the day after the **Start Time**.
If you select Next Day, the End Time must be before 12:00 noon.
4. Enter any comments you want to make regarding this **Calendar item**.
5. Click **Finish**.

Add or edit comments

If you selected **Day Off** in the **Choose Calendar Items** screen, the **Comments** screen appears when you click **Next**.

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- Type your comments, if you have any, into the **Comments** text box, and then click **Finish**.

The **Calendar** reappears, displaying the new or edited day off.

Add or edit exceptions

Select **Exception** on the **Choose Calendar Item** screen and click **Next**, to open the **Choose Exception** view.

1. Select an exception type from the **Exceptions** list. This list shows all of the exceptions that are available for the selected agent(s).
 - **Yes**, under **Paid**, indicates that the exception counts as paid time.
 - **No**, under **Full Day**, indicates a part-day exception.
 - **Yes**, under **Convertible**, indicates an exception that can be converted to a **Day Off**.
2. Set the **Start Time** and **End Time**, if necessary.
 - For part-day and full-day exceptions, type times directly into these text boxes or use the up and down arrows to select the times.
 - Click the down and up arrows to control hours.
 - To change minutes, highlight, and type over existing minutes. For example, you could enter a one-minute exception from 10:01 to 10:02.
3. If you select a full-day paid exception, select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a workday.
 - If you check **Specify Paid Hours**, the **Paid Hours** text box becomes editable.
 - If you enter a start/end time but do not enter a value for **Paid Hours**, then **Paid Hours** will equal **End Time** minus **Start Time** (a value known as **Standard Hours** or **Duration**).
4. If you want to enter comments or additional information about this exception, type it into the **Memos** text box.
To learn more about memos in Calendar items, see Exception Memos in the Workforce Management Administrator's Guide.
5. Click **Finish**.
The Calendar reappears, displaying the new or edited exception.

If WFM Web cannot assign some selections, it opens a window that lists the agents, days, and reasons why the assignment cannot be completed.

Add or edit shifts

If you select **Shift** on the **Choose Calendar Item** screen, the **Choose Shift** screen appears when you click **Next**.

1. Select a shift name from the **Shifts** list.

This list shows all shifts that are available for the selected agents and days.

2. Change the **Start Time**, if necessary.
The drop-down list shows all possible start times for the selected shift, based on the shift's configuration.
3. Enter or change the **End Time**, if necessary.
You can either type a time directly into the text box, or use the up or down arrow to select the time. The field accepts only times that match the selected shift's configured end times.
4. Select **Next Day** if the **End Time** is on the day after the **Start Time**.
5. If you want to enter a comment, type it into the **Comments** text box.
6. Click **Finish**.
The Calendar reappears, displaying the new or edited shift.

Add or edit time-off items

Use this dialog to add new time-off items or edit existing ones.

If you select **Time Off** on the **Add Calendar Item** screen, then the **Choose Time Off** screen appears when you click **Next**.

1. Select a time-off type from the **Choose Time Off** list. This list shows all of the time-off types that are configured for the selected site.
2. Select the **Show all** check box to display all time-off types. Clear this check box to display only the time-off types that are applicable to the selected agent.

Important

If you select a time-off type that is not associated with a selected agent, then WFM assigns the time off but does not enforce the time-off balance rules ...except for limits. If the time-off type counts toward time-off limits, then WFM takes this time-off item into account when calculating limits.

3. Optional: select the **Full Day** check box if the time-off preference is for a full day off.
4. Optional: Adjust the **Start time** and **End time** for this time-off item, if the default values are not correct.
5. Select the check box **Specify Start/End** to enable the **Start Time** and **End Time** fields, then click inside each field to modify the default values for hours, minutes, and AM/PM.
6. Select **Next Day** to the right of the **End Time** text box if duration of the time off ends on the day after it begins.
7. Optional: Specify a nonstandard length of your full-day time-off request.
8. Select the **Specify Paid Hours** check box to enable the **Paid Hours** field, then click inside and enter or select a value to specify the exact number of hours in a full day for this particular time-off item. The **Specify Paid Hours** check box is enabled only if you selected a paid time-off type in the **Choose Time Off** list.

Important

If you are adjusting part-day time-off preferences, remember that all part-day time-off preferences must comply with all settings for at least one qualifying shift, including meal parameters. You might not need to adjust this value manually. If you selected a single agent, then the default is the number of paid hours/minutes configured for the agent's time-off rule, for the time-off type being inserted. If you selected multiple agents, the default value is 0 (zero).

- Optional: Select the **Wait-list** check box to specify that the request stays in a **Preferred** status, if a time-off request is denied because the time-off limits have already been reached.

The request could eventually be granted by a Supervisor, if an opening becomes available, although this is not guaranteed.

- Optional: Enter a comment inside the **Comments** text box.

- Click **Finish**.

The Calendar reappears, displaying the new or edited time-off item.


Important

If you are entering multiple part-day time-off items, these cannot overlap each other or any part-day exception.

Update schedule options

Use this functionality to update the selected schedule with time-off calendar items which have the status **Granted**, **Not Scheduled**, **Recalled**, or **Scheduled**.

1. Create a **Granted Time Off** item in the calendar. (Use the Add Calendar Item Wizard.) Its status will be **Granted, Not Scheduled**
OR
Select a Time Off item that has Recalled, Scheduled status.

2. Click the **Update Schedule** icon () in the toolbar, or the **Update Schedule** button at the bottom right of the WFM window, or select **Update Schedule** from the **Actions** menu.
3. Correct any errors. If there are no errors, then the **Update Schedule Options** dialog box appears, offering three check boxes which are all selected by default:
 - Insert only if there are no errors or warnings
 - Show warnings
 - Auto commit inserted items
4. Clear any check boxes that you do not wish WFM to obey, and click **OK**.
The selected Time Off item is published to the Master Schedule.

Important

WFM displays a warning under these circumstances:

- When you insert a full-day **Time Off**—either from the Calendar or directly into the Master Schedule—on a day in the Master Schedule that is already a **Day Off**.
- When you insert a full-day or part-day **Time Off**—either from the Calendar or directly into the Master Schedule—on a day in the Master Schedule that already has an **Exception**.

Edit calendar items

To edit a Calendar item:

1. Select an item in the **Calendar** view's table.
You can edit only one Calendar item at a time.
2. Double-click the selection or click **Edit**.
The appropriate **Edit** screen displays. See the table below for a list of the Calendar-item types and the edit screen that opens for each.

Calendar Item	Edit Screen
Availability	Add or Edit Start/End Time
Day Off	Comments
Exception	Add or Edit Exception
Shift	Add or Edit Shift
Time Off	Add or Edit Time Off

Calendar Item	Edit Screen
Working Hours	Add Calendar Items Wizard

Important

If the calendar item's **Exception Type** or **Time-Off Type** has been disassociated from the current site, use the dialog box that appears to select a new **Exception Type** or **Time-Off Type**—one that is still associated with the current site. You can keep the disassociated **Exception Type** or **Time-Off Type**, or you can edit the calendar item, but not both. Alternatively, you can re-associate the missing **Exception Type** or **Time-Off Type** and then do both.

3. Change the **Calendar item's** settings as necessary.

Tip

The available settings depend on the type of item that you are editing.

4. Click **OK** to save your selections, or **Cancel** to exit without saving them.
The Calendar reappears, displaying any changes that you have saved.

If WFM Web cannot assign some selections, it opens a window that lists the agents, days, and reasons involved.