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Workforce Management Web for Supervisors (Classic) Help

Calendar

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- Supervisor

Add and edit agents' exceptions, preferences, and time off using the Calendar view's settings dialogs, and wizards.

Related documentation:

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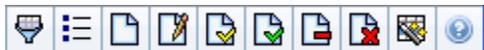
The **Calendar** module contains two views: Calendar items and Time-Off Limits.

- Select **Calendar items** to:
 - Add availability, days off, exceptions, shifts, time off, and working hours.
 - Edit agent exceptions, preferences, and time off.
 - Review rotating patterns.
 - Change the time zone to view Calendar items' times in the selected by user time zone.
- Select **Time-Off Limits** to set time-off limits.

Calendar Items

The **Calendar Items** module displays agents' shifts, days off, time off, exceptions, and availability. You can add, edit, and filter most types of Calendar items within this view, and also edit exceptions, working hours, shifts, and availability.

Rotating patterns appear in the Calendar with an RP: prefix. Rotating pattern information is read-only. To change rotating pattern settings, you must use the Rotating Patterns pane in the **Policies** module.



The toolbar buttons are across the top of the window and the action buttons are across the bottom of the window. The Agents and Activities trees are at the top of the **Objects** pane.

Use the **Calendar Items** view to add and edit the following:

- Exceptions are periods of time when agents are engaged in non-work activities.
- Preferences are agent and supervisor requests for particular shifts, days off, availability, and time off.
- Rotating patterns are rotating workweeks of shifts, working days, working hours, and/or work activities. A rotating pattern can be assigned to an agent or a team.

Security access permission

The WFM Web defines security access permissions. Users may have full security access to this module, or they may only be able to work with preferred Calendar items.

If you have limited access, then the **Grant**, **Prefer**, and **Decline** buttons are disabled. You can only add, edit, or delete calendar items in **Preferred** status.

Displaying the Calendar view

To view Calendar items:

1. If the **Calendar Items** module is not displayed, select Calendar from the **Views** menu.
2. In the three-month Calendar display, select the date(s) to view. Shift-click selects multiple dates.
3. Click **Get data** below the **Object** pane.

Calendar view columns

| Name | Description |
|-------------------|--|
| Date | Displays the date of the Calendar item. |
| Site | Displays the site to which the Agent in this row belongs. |
| Team | Displays the team to which the Agent in this row belongs. |
| Agent | Displays the name of the agent who has the Calendar item. Calendar items can be applied to sites or teams, but they are displayed and edited agent-by-agent. |
| Type | Displays the type of the Calendar item (for example, part-day exception). |
| Item | Displays the name of the Calendar item (for example, Team Meeting or Shift_1). |
| Start time | Displays the time the Calendar item begins. Some full-day rotating pattern items (Day Off, Any Shift, and Flexible Shift) do not have start or end times. For this reason, the Start time and End time columns are empty for these items. |
| End time | Displays the time the Calendar item ends. +1 indicates the day after the start time; +2 indicates two days after the start time. Some full-day rotating pattern items (Day Off, Any Shift, and Flexible Shift) do not have start or end times. For this reason, the Start time and End time columns are empty for these items. |
| | Displays the status of a Calendar item for a period |

| Name | Description |
|-------------------------|--|
| Status requested | that has not yet been included in a schedule, as set by the user: Granted , Declined , or Preferred . See Changing preference statuses for an explanation of the statuses. See Requested status vs. actual status for an explanation of the status that appears in the status requested and Status actual columns. |
| Status actual | Displays the status of the Calendar item as resolved by Workforce Manager: Granted , Declined , Preferred , Scheduled , or Not Scheduled . See Changing preference statuses for an explanation of the statuses. See Requested status vs. actual status for an explanation of the status that appears in the status requested and Status actual columns. |
| Reason | Explains why WFM has set an item's actual status to Declined . You can display/hide this column by using the Options dialog. |
| Comments/Memo | Displays any comments or additional information associated with the Calendar item, including ones that might have been entered by agents when requesting the item using WFM Web for Agents. You can display/hide this column by using the Options dialog. This column is not sortable. |
| Paid Hours | Displays the number of paid hours for the calendar item. You can display or hide this column by using the Options dialog. |

Calendar Items controls

Toolbar buttons

Select a view from the drop-down **Views** menu (on the left side of the toolbar): Calendar Items or Time-Off Limits.

| Icon | Name | Description |
|---|---------|---|
|  | Filter | Filter the display. |
|  | Options | Select whether to include these columns in the table: Team, Reason, Comments, Paid Hours, Hire Date, Submitted. |
| | Add | Add an item (in this view, a calendar item). |

| Icon | Name | Description |
|--|----------------|---|
|  | | |
|  | Edit | Edit the selected calendar item(s). |
|  | Prefer | Change the status of the selected agent request(s) to Preferred. |
|  | Grant | Change the status of the selected agent request(s) to Granted. |
|  | Decline | Decline the selected agent request(s). |
|  | Delete | Remove the selected calendar item(s). |
|  | Update | Insert time-off items and meeting-specific criteria to the master schedule. (You must be a supervisor with edit rights to the master schedule.) |
|  | Help | Display context-sensitive help. |

Time zone

Select the time zone for this instance of WFM by using the drop-down list that appears below the toolbar buttons and above the calendars. The following choices appear in the list:

- **User's**—Specifies the time zone of the current user, as configured for that user in WFM Web.
 - If no time zone is configured for the current user, then WFM specifies the default time zone.
 - If no time zone is configured, then this option is disabled.
- **BU's**—Specifies the time zone of the BU that is selected on the **Object** pane.
- **Site's/BU's**—Specifies the time zone of the site that is selected on the **Object** pane.
 - If more than one site is selected, then WFM specifies the time zone of the BU that is selected on the **Object** pane.
- **Local** (default)—Specifies that data for every site will be returned in that site's local time zone.
- **Configured time zones**—Specifies the time zone that you choose from the remainder of items in this list.
 - Each remaining item is a configured time zone (and its relationship to GMT). For example, Pacific Standard Time, which is 8 hours earlier than Greenwich Mean Time, is presented as PST (GMT-8.0).

Action buttons

All toolbar buttons also appear in the **Actions** menu.

In addition, the toolbar buttons **Edit, Prefer, Grant, Decline, Delete, Update Schedule**, appear as action buttons at the bottom of the **Calendar** window.

Objects pane

The **Objects** pane, on the left side of the WFM window, displays the database objects that you can retrieve.

Agents tree

The **Agents** tree displays agents in the Enterprise. The tree is hierarchical from top to bottom: Enterprise, Business Units, Sites, Teams, and Agents.

Activities tree

The **Activities** tree displays activities in the Enterprise. The tree is hierarchical from top to bottom: Enterprise, Business Units, Multi-site Activities, Activity groups, Sites, and Activities.

Each item in the **Object** trees has a check box, which is either cleared or selected. Checking an item, in one of the trees causes a reaction in the other tree: selecting an agent automatically selects the corresponding activities, and selecting an activity automatically selects the corresponding agent(s)/team(s)/site(s)/business unit.

Tip

You can simultaneously select items that are located below different sites within the same business unit. Nothing is selected by default.

How to use the Calendar

Use the Calendar in the following ways:

- Select any single date by clicking it.
- Select multiple dates by holding down **Ctrl** while clicking them.
- Select a range of dates by holding down **Shift** while clicking them or by clicking the first day and then dragging the mouse to the last day before releasing the mouse button.
- Select the same day of the week throughout a month by clicking that day's header. For example, to display all Mondays, click **Mon**.
- Display a different year or month by clicking the year or month drop-down arrow.

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- Go back a month by clicking **<**, or advance to the next month by clicking **>**.

To retrieve specific data:

1. Select a date or range of dates.
2. Select one or more sites, one or more teams, or one or more agents (within one Business Unit) from the **Objects** tree.
3. Click **Get data**.
The table displays Calendar items for the selected site, teams, or agents.

Sort the display by clicking the header for any column, or search the table for particular agents by using the **Find Agent** dialog box.

- To open it, select the table to search and then select **Find** from the **Edit** menu or press **[Ctrl] + F**.

If the full text is too long to appear in a calendar cell, hover your mouse pointer over that cell. The full text appears in a tooltip.

Tip

By default, if another user adds a new exception type while you have the Calendar open, the new exception type is not selected in the Filter dialog. To see agents who are assigned an exception of the new type, open the Filter dialog and select the check box for the new exception type.

Object hierarchy

When you enter more than one kind of Calendar item for an agent at the same time, a hierarchy determines which takes precedence. The higher priority item appears as **Granted**, and incompatible lower-priority items appear as **Declined**.

The order of priority for exceptions and preferences is:

1. Granted full-day exceptions.
2. Granted days off.
3. Granted full-day time off.
4. Granted availability.
5. Granted shifts.
6. Granted paid (working) hours.
7. Granted part-day exceptions, granted part-day time off.
8. Rotating patterns.
9. Preferred items (including exceptions, paid hours, and time off with preferred status).

Consistency checks

After you add an exception or preference in the Calendar, the Calendar performs consistency checks to determine whether it is valid.

To be valid, an exception or preference must:

- Fall within the agent's Contract availability hours.
- Fall within activity hours of operation for activities that the agent can perform.
- Be consistent with the Contract paid hours requirements. Unpaid exceptions are added to the paid hours if they do not violate the Contract availability hours.

In addition, if you are entering multiple part-day exceptions, part-day time off, or a mix of part-day exceptions and time off, these:

- Cannot overlap.
- Must be compatible with a qualifying shift's settings, including meal parameters. (This limitation does not apply to full-day time off or days off.)

Preference and exception considerations

- You can enter multiple compliant Calendar items for the same day. For example, you can enter a shift and a day off for the same day. Or you can enter an availability and a shift for the same day if the shift fits into the availability parameter. WFM Web assigns the item that best fits the agent's schedule.
- You can enter only one full-day exception of a single type per day. However, you can enter multiple part-day exceptions of the same type. (WFM Web sets the status of incompatible Calendar items to **Declined**.)
- You can add or edit preferences and exceptions even after a schedule has been created for the affected days. However, if you make changes after building the schedule, you must rebuild the schedule to pick up the changes.

Explanation of colors

The Calendar uses two basic cell colors, light blue and grey, and two colors for selected items, yellow and white.

- Gray indicates a non-selected cell for which data has not been requested. There may be data for that day or there may not.
- Light blue indicates a non-selected cell for which there is data. That is, at some earlier point in this session you selected this date and clicked Get data.
- Yellow indicates a selected cell for which there is data.
- White indicates a selected cell for which data has not been requested. There may be data for that day or there may not.

The calendar uses two text colors, black and red.

- Black indicates that you have not yet requested data for a day, and that cells are not selected.

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- Red replaces black when a cell is selected.