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Workforce Management Web for Supervisors (Classic) Help

Filtering, Options, and Preference Statuses

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- Supervisor

Learn how to filter the items that appear in the Calendar Items view, show or hide columns in the table, and change the status of agent preferences in the Calendar.

Related documentation:

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Filter dialog

Use the **Filter** dialog box to change which items appear in the **Calendar Items** module:

1. Select the **Calendar** tab.
2. Select **Calendar Items** from the **Views** menu.
3. Select one or more objects from the **Objects** pane. An object can be:
 - In the **Agents** tree: a business unit, site, team, or agent
 - in the **Activities** tree: business unit, a multi-site activity, site, activity.
4. Select a date or dates on the Calendar.
5. Click **Get data**.
6. Click the Filter icon on the **Calendar Items** module toolbar or select **Filter** from the **Actions** menu. The **Filter** dialog box appears. It has three tabs:
 - **Calendar Items** lists all exception types, preference types, time-off types, and rotating patterns.
 - **Status Requested** lists all statuses that can appear in the Status Requested column of the Calendar table.
 - **Status Actual** lists all statuses that can appear in the Status Actual column of the Calendar table.
7. Clear the check boxes for any Calendar items or statuses that you want to hide from the Calendar display. Or select the check boxes for any currently hidden items that you want to display.
8. Click **OK** to save your changes or **Cancel** to restore the existing selections.
The Calendar view is updated to match your selection.

Tip

By default, if another user adds a new exception type while you have Calendar open, the new exception type is cleared in the **Calendar Filter** dialog box. To see agents

who have an exception of the new type assigned, open the **Filter** dialog box and select the check box for the new exception type.

Options dialog

Use the **Options** dialog box to show or hide columns in the **Calendar items** table.

- **Site**—The site of the Agent who appears in that row.
- **Team**—The team of the Agent who appears in that row.
- **Shared Transport**—The shared transport to which the agent (displayed in that row) is joined.
- **Reason**—An explanation for why the actual status is different from the requested status.
- **Comments/Memo**—Any comments or memo made when this calendar item was entered or most recently edited.
- **Paid Hours**—The number of paid hours for the calendar item.
- **Hire Date**—The date that the Agent began work for the company.
- **Submitted**—The date and time that the Calendar item was submitted (by either an Agent or a Supervisor, depending on the type of Calendar item).

To use the **Calendar Options** dialog box:

1. Select the **Calendar** tab.
2. Select **Calendar Items** from the **Views** menu.
3. Select an object from each pane (**Agents/Activities**) of the Objects pane.
4. Select a date or dates on the Calendar, and click Get data.
5. Click the Options button on the toolbar or select **Options** from the Actions menu.
The **Options** dialog box opens and lists all available choices.
6. To display a column, select the check box next to its name. To hide it, clear the check box.
7. Click **OK** to save your settings or **Cancel** to discard them.
The main **Calendar** window re-appears, showing the new settings.

Changing preference statuses

Use the Calendar Items view to change the status of an agent's preference, exception, time off, or working hours (shift and availability) request prior to publishing the schedule.

- Before you publish the schedule, the possible actual status settings are **Preferred**, **Granted**, and **Declined**.
- After you publish the schedule, the possible actual status settings are **Scheduled** or **Not Scheduled**.

What are preference statuses?

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 will appear 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**.
- A **Declined** preference will not appear in the schedule unless it was 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**.
- A **Preferred** preference may appear in the schedule if it complies with the scheduling constraints and optimization settings that are configured for your site.

Two columns in the **Calendar Items** module show the preference status: **Status Requested** and **Status Actual**. See below for an explanation of the two categories.

To change the status of a not-yet-scheduled item:

1. In the **Calendar's item** column, click the name of the item you want to change.
2. Click an action button for the item's new status: **Prefer**, **Grant**, or **Decline**.
3. Click **OK**.
The new status appears in the **Status** columns.

Important

The status can be different in each column, and the **Actual Status** can differ from the status that you just assigned. This is because of the way in which the **Requested** and **Actual Status** columns function, as explained below.

Requested status verses actual status

Requested Status and *Actual Status* refer to the two ways in which each exception and preference is saved.

- **Requested Status** is the preference's status as entered by the user. If more than one preference is entered on a particular day, each item is saved to the database with the status that it has when entered.
- **Actual Status** is the status as resolved by WFM. WFM evaluates all current exceptions and preferences based on their positions in the calendar object hierarchy. If an agent has multiple preferences for a day, the **Actual Status** indicates how WFM has resolved them.

For example, if an agent prefers a full-day time off, that preference is saved in the database as **Preferred**. If the agent is then assigned (**Granted**) a meeting exception for that day, the exception

overrides the preference. WFM evaluates the current set of exceptions and preferences, and notes the time-off preference as **Declined**. However, the database maintains the preference status as Preferred because, until a schedule is generated, the exception can be removed. In this case the preference would again take effect and the preference **Actual Status** would change to **Preferred**.

Tip

Rotating pattern assignments are **Granted** by default, so they do not need a separate status saved to the database.