GENESYS™

Genesys Engage cloud Workforce Management 8.5.1 Guide

Exception Types

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Exception Types

> ### Important
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Workforce Management in Genesys Engage cloud.

Exception types define periods of time when agents are engaged in non-work activities, such as training or meetings. Each site configures its own set of exception types, based on its business requirements. Find more details in the following topics:

- Trade Rules Associated with Exception Types
- Using Time-Off Types Instead of Exception Types
- Creating Partial-Day Exceptions
- Adding and Editing Exception Types
- Properties Tab
- Associated Sites Tab

Trade Rules Associated with Exception Types

You can change which trade rule is associated with a specific **Exception Type**, but you cannot edit or delete a **Trade Rule**.

Using Time-Off Types Instead of Exception Types

The standard exception types that WFM creates when you choose the **Generate Default Schedule State Groups** and exception types while importing a site include several that represent various types of time off. These exception types, and the **Exception is Used as Time Off** setting, are included for backward compatibility only.

For example, the standard exception types include **Time Off**, **Holiday**, **Sick Day**, and **Personal Day**. These time-off exception types are comparatively inflexible and cannot be associated with time-off accrual rules. For this reason, time-off types are the preferred way to configure the various kinds of time off periods you use.

Genesys recommends that you configure all types of time off using the **Time-Off Types** module instead of configuring them as exception types.

> **Tip**
> Supervisors can also enter time off as preferences in WFM Web's **Calendar** module.

Creating Partial-Day Exceptions

Scheduler evaluates partial-day exceptions to see whether they are **Valid** or **Invalid**. Valid partial-day exceptions comply with the criteria that are listed in **Exception Type Properties** (below).

Partial-day exceptions must:

- Not conflict with a full-day exception or granted preference.
- Fall entirely within the agent's availability pattern as specified in the **Contract** module and (if applicable) within granted availability preference hours.
- Fall entirely within activity hours of operation for activities the agent can perform.
- Fall entirely within at least one compatible shift's start and end times and be compatible with the meal settings for that shift.
- Not overlap the start or end time for another partial-day exception.

Adding and Editing Exception Types

To add new exception types:

1. In the **Policies** module, select **Exception Types**.
2. In the **Objects** pane, select the site(s) or business unit with which the new object will be associated.

   > **Tip**
   > You can select multiple sites (just keep clicking on them) but only one business unit.

3. Select **New** from the **Actions** menu or the **New** icon ( ) from the Toolbar.
4. Configure the new object on each of the tabs in the **Data** pane (**Properties**, **Associated Sites**).
5. When you are finished, click **Save**.

> ### Important
>
> There is no copy and paste functionality because the same exception type can be associated with multiple sites under the same business unit. There is no need for multiples.

To edit exception types:

1. Select the exception type in the top half of the **Data** pane.
2. Make the necessary changes. See **Exception Type Properties** for information on configuring these settings.
3. Click **Save**.

To delete exception types:

1. Select the exception type in the top half of the **Data** pane.
2. Select **Delete** from the **Actions** menu or the delete icon ( ) from the **Toolbar**.

Properties Tab

- **Exception Type Name**—Each exception type should have a descriptive name. The name must be unique within all sites associated with the exception.
- **Short Name of Exception Type**—To be used in graphical representations of the exception in **Calendar** and **Scheduler**, and can be up to three characters.
- **Exception Usage**—Select one of the following radio buttons:
  - **Regular**—An ordinary exception.
  - **in Meeting Planner/Scheduler**—This exception will be used to configure a meeting and will be inserted into the schedule when the meeting is scheduled.
  - **as Time Off**—The exception duration is counted against the Time-Off balance.

  > ### Important
  >
  > The Exception Used as Time Off property does not use any other time-off rules or settings (including time-off limits). The ability to use an exception as time off is intended for legacy purposes only, for customers who have previously created exceptions to use as partial-day time off. Genesys recommends that users set up time-off types that they can use for both full-day and partial-day time off, and that they no longer use exceptions to represent partial-day time off.

  - **Convertible to Day Off**—Select this check box to instruct **Scheduler** to convert a full-day exception to a day off, if that is necessary for consistent scheduling. The day off is counted

towards **Preference Fulfillment**.

> ### Important
> Selecting this check box disables and checks the property **Exception Is Exclusive** for the **Whole Day**.

- **Exception Type Is Paid**—If the check box is selected, the exception is paid. If cleared, it is unpaid.

  - **Allow Breaks and Meals during Exception**—Select this check box to allow breaks and meals during the currently selected exception. Default setting: cleared. Disabled if the current combination of selected exception properties does not allow breaks. (Enabled only if **Exception Type is Paid** is selected.)

- **Exception Is Exclusive for the Whole Day**—This exception occupies the entire day.

- **Trade Rule**—Indicates how this exception should be treated if an agent who is assigned this exception is involved in a schedule trade. From this drop-down list, select possible values are **Delete**, **Do Not Trade**, **Keep with Agent**, and **Keep with Schedule** (default).

- **Agent Initiated**—Select this check box to allow an Agent to initiate this **Exception type**. Default: cleared.

  - **Specify Dates**—Select this check box to set the start and end date for the exception. This check box is enabled only when the **Agent Initiated** check box is selected.

  - **Start Date**—Select to specify the start date of an allowed range for this exception type. Then enter the month, day, and year manually, or click the down arrow to select the date from a drop-down calendar. The default is the current date.

  - **End Date**—Select to specify the end date of an allowed range for this exception type. Then enter the month, day, and year manually, or click the down arrow to select a date from the drop-down calendar. The default is the current date.

Associated Sites Tab

1. Select the check box of each site to associate with the current exception type.

2. Clear the check box of each site to disassociate with the current exception type.

3. Click **Save**.