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Workforce Management Web for Agents Help (Classic)

Preferences and Patterns

Contents

- 1 Preferences and Patterns
 - 1.1 Making your preferences known
 - 1.2 Managing your preferences
 - 1.3 Understanding the status hierarchy
 - 1.4 Using patterns to make availability preferences known

Preferences and Patterns

The Workforce Management (WFM) *Preferences* feature enables you to set preferences for your availability, shifts, and days off. Use preferences to let your supervisor know when you prefer to work and what days you prefer to have off. Supervisors can then take your preferences into consideration when building schedules.

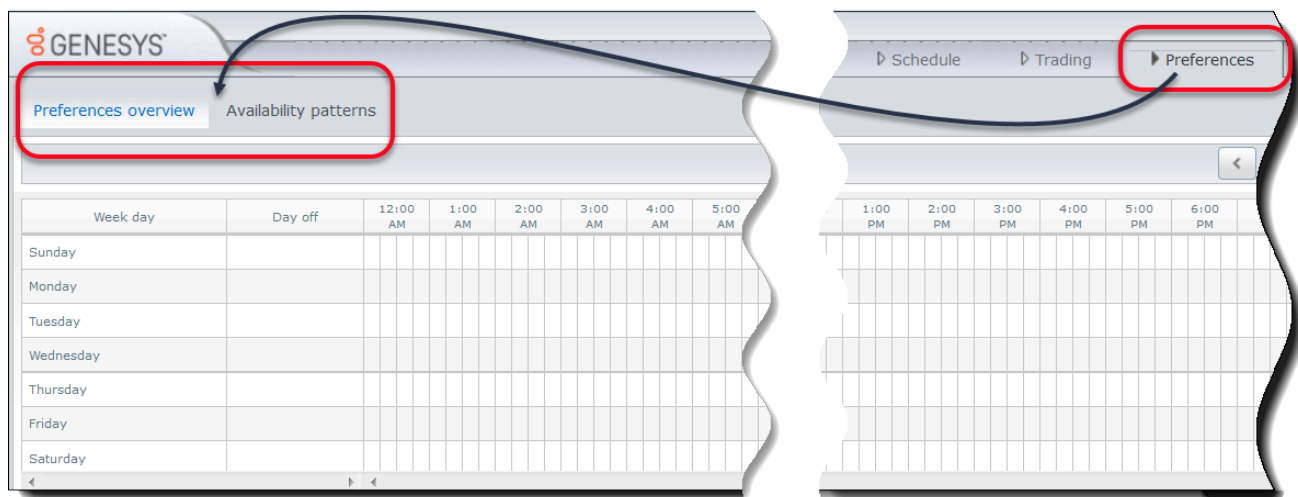
Decide which type of preference you want to create. If you choose availability preferences, ask yourself if you would reuse these preferences—for example, for multiple weeks in a row. If the answer is yes, use availability patterns to create a preferences *template* that you can reuse any time, and as many times as you like.

You create patterns for availability preferences only (not shifts or days off).

Tip

If you do not see Preferences in the menu bar, they are not enabled in your contact center.

Making your preferences known



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. 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 preference, but they are individual entries and do not establish a pattern for a specific time period. For that, you will use **availability patterns**.

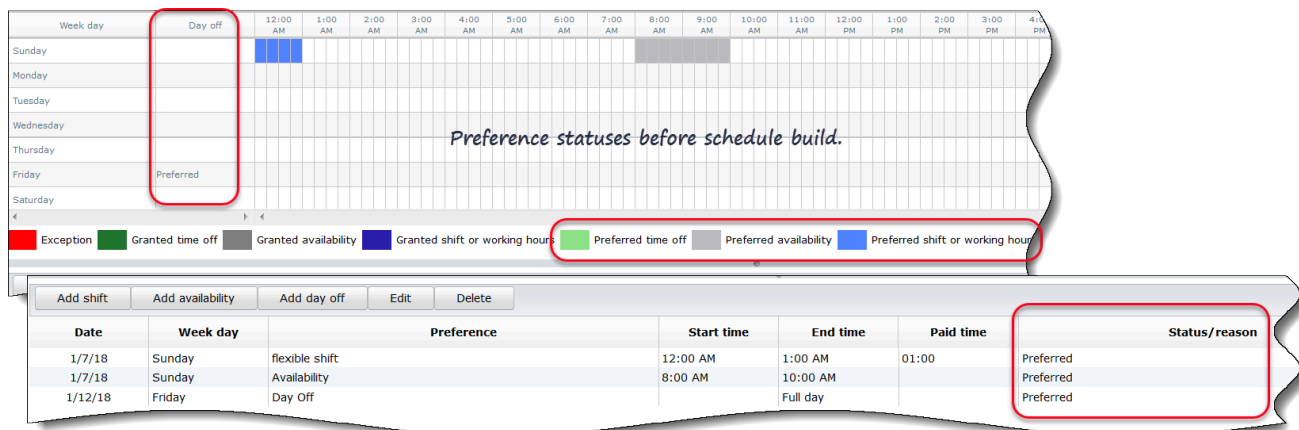
Use the **Preferences > Preferences Overview** tab to enter your preferred availability, shifts, or days off.

Managing your preferences

The screenshot displays the 'Preferences Overview' tab interface. At the top, a toolbar contains five buttons: 'Add shift', 'Add availability', 'Add day off', 'Edit', and 'Delete'. The 'Add shift', 'Add availability', and 'Add day off' buttons are grouped together and highlighted with a red rounded rectangle. Below the toolbar is a table with columns: 'Date', 'Week day', 'Preference', and 'Start time'. Three modal windows are open, each corresponding to one of the highlighted buttons. The first modal, titled 'New Shift', contains fields for 'Date' (10/29/17), 'Shift' (flexible shift), 'Start time' (12:00 AM), and 'End time' (01:00 AM) with a 'Next day' checkbox. The second modal, titled 'New Availability', contains fields for 'Date' (10/29/17), 'Start time' (12:00 AM), and 'End time' (12:00 AM) with a 'Next day' checkbox. The third modal, titled 'New Day off', contains a 'Date' field (10/29/17) and a 'Comments' field. Each modal has a 'Cancel' button at the bottom left, and the 'Day off' modal also has an 'OK' button at the bottom right. A blue arrow points from the 'Add day off' button to the 'New Day off' modal.

Use the buttons in the bottom half of the **Preferences Overview** tab to manage your preferences and monitor their **statuses**. Adding **availability**, **shift**, and **day off** preferences is straightforward, as is **editing and deleting** preferences.

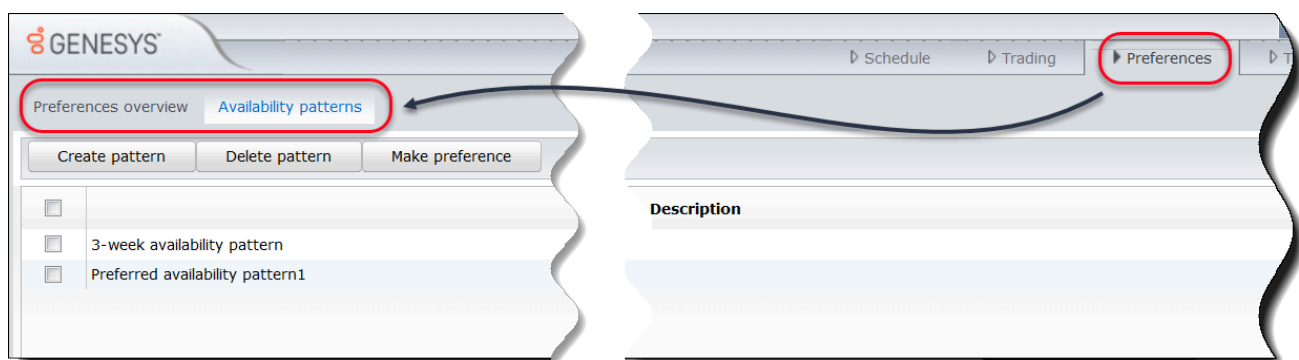
Understanding the status hierarchy



Your preferences will have different statuses before and after your supervisor builds the schedule. Some preferences have priority over others and those preferences are processed and granted before other lower-priority preferences. See the [order or hierarchy of preferences](#) to understand when you can expect your preferences to be granted.

You can see the [preference status](#) in the bottom half of the **Preference Overview** tab.

Using patterns to make availability preferences known



Use *availability patterns* to easily set preferences for a range of dates, when your preferences are the same for multiple weeks, or to set a weekly pattern 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 day separately (even though your availability is the same for all three weeks).

1. Create the pattern

Preferences overview **Availability patterns**

Create pattern Delete pattern Make preference

- ☐ 3-week availability pattern
- ☐ Preferred availability pattern2
- ☒ Preferred AP1

Description
Preferred AP1

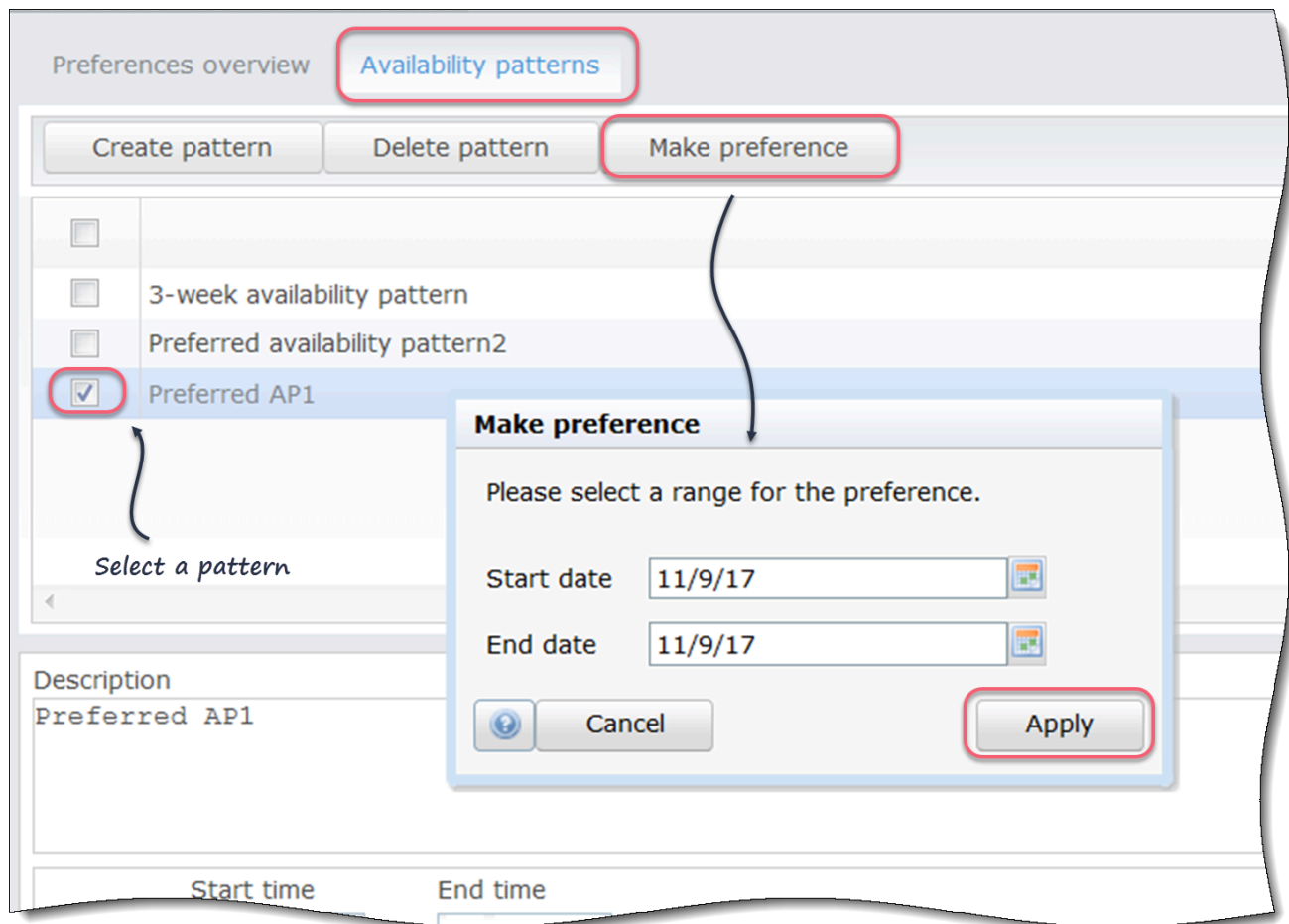
| | Start time | End time | |
|-----------|------------|----------|--|
| Sunday | 12:00 AM | 12:00 PM | <input checked="" type="checkbox"/> Next day |
| Monday | 12:00 AM | 12:00 PM | <input checked="" type="checkbox"/> Next day |
| Tuesday | 12:00 AM | 12:00 PM | <input checked="" type="checkbox"/> Next day |
| Wednesday | 12:00 AM | 12:00 PM | <input checked="" type="checkbox"/> Next day |
| Thursday | 12:00 AM | 12:00 PM | <input checked="" type="checkbox"/> Next day |
| Friday | 12:00 AM | 12:00 PM | <input checked="" type="checkbox"/> Next day |
| Saturday | 12:00 AM | 12:00 PM | <input checked="" type="checkbox"/> Next day |

Apply Cancel

Using patterns to add availability preferences is a two-step process. First you create the availability pattern and then, you use the pattern to add your preferences.

Use the **Preferences > Availability Patterns** tab to **create weekly patterns**. You can then, use these patterns to **set your availability preferences** for a specific date range.

2. Use the pattern to make preferences



After creating a pattern, you can reuse it to set availability preferences at any time. It's a great way to let your supervisor know, in advance, when you are available for work outside of your scheduled shift.