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Workforce Management Web for Supervisors Help

Change Preference Status

5/5/2025

Change Preference Status

Use the Calendar Items module 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**.

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 higherranking 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 vs. 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.