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Workforce Management Web for Supervisors Help

Inserting Exceptions

Inserting Exceptions

WFM uses different dialog boxes and menu items for part-day and full-day exceptions:

- Use the **Insert Exception** dialog to **insert a part-day exception** into an agent's schedule.
- Use the **Insert Full-Day Exception** dialog to **insert a full-day exception** into an agent's schedule.

For example, you might need to schedule a full-day meeting or a one-hour appointment after the schedule was created.

Inserting Part-Day Exceptions

To insert a part-day exception:

1. In the **Intra-Day** or **Agent-Extended** view, **right-click** an agent's dark-blue shift bar (you can change the color with the **Colors Tool**).
2. Click at or near the where you want the exception to begin.
3. From the shortcut menu that appears, select **Insert > Exception**.
The Insert Exception dialog box opens. The agent's name appears in the title bar. You can add memos to Exceptions that then appear in some Schedule views and reports. For details see Exception Memos in the Workforce Management Administrator's Guide.
4. In the grid, click an exception row.
The grid shows the part-day exception types that are configured in the Policies module of WFM Web for Supervisors. If necessary, a vertical scroll bar appears to the right. The first two columns show each exception's full and short name. Check marks in the remaining columns indicate whether the exception is paid, whether it is convertible to a day off, and whether it counts as time off. You cannot select or clear check boxes to change these attributes here. The column Site lists all sites to which the exception is assigned.
5. Adjust the **Start time** and **End time** for this exception.
 - Select **Next Day** next to the **Start Time** and **End Time** text boxes if the exception starts on the day after the agent's shifts begin.
 - Or select **Next Day** next to the **End Time** text box if the exception begins on the same day as the agent's shifts begin, but ends on the day after.
6. Click **OK** to insert the selected exception and close the dialog box.
The view reappears. The new exception appears as a red bar (you can change the color with the Colors Tool).

Important

If the Start and End times would place the exception outside the agent's shift hours, a warning message appears. If an agent's activities are all scheduled in activity sets, and you assign a long exception, the exception may be the only schedule state group available during the agent's paid hours.

Inserting Full-Day Exceptions

To insert a full-day exception:

1. In the **Intra-Day** or **Agent-Extended** grid, **right-click** an agent's row.
2. From the shortcut menu that appears, select **Insert > Full-Day Exception**.
The **Insert Full-Day Exception** dialog box opens. The agent's name appears in the title bar.
3. Click an exception row.
The list shows the full-day exception types that were configured in the **Policies** module of WFM Web for Supervisors. If necessary, a vertical scroll bar appears to the right. The first two columns show each exception's full and short name.

Check marks in the remaining columns indicate whether the exception is paid, whether it is convertible to a day off, and whether it counts as time off. You cannot select or clear check boxes to change these attributes here.

The column **Site** lists all sites to which the exception is assigned.

4. In the **Specify Start/End** section, you can optionally adjust the exception's **Start time** and **End time** as necessary.
 - If the exception begins on the same day as the agent's shift begins, but ends on the day after, select **Next Day** next to the **End Time** text box.
 - If you selected a paid exception, you can select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a work day.
 - If you select the **Specify Paid Hours** check box, the **Paid Hours** check box becomes enabled.

Important

If you enter a start/end time but do not enter a value for **Paid Hours**, then **Paid Hours** will equal **End Time** minus **Start Time** (a value known as **Total Hours or Duration**).

5. Click **OK** to insert the selected exception and close the dialog box. The view reappears. The new exception shows as a red bar.