



Scheduling with Availability & Preferences

Webinar handout
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About this document

This document accompanies the CommunityWFM College webinar *Scheduling with Availability & Preferences*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

What is Scheduling with Availability & Preferences?

Creating schedules using a flexible schedule template along with availability and/or preferences allows you to create schedules that align with business needs and agents' needs and preferences. Using preferences offers you the opportunity to reward the desired behavior in agents and using availability lets you consider each agent's specific scheduling needs, while still being flexible.

What are schedule preferences?

Schedule preferences consist of start time preferences and day off preferences. Both are unique to each agent and can be created by the agents or by another user with permission to access those items (e.g., a supervisor or WFM admin).

When creating schedules using preferences, agents are ranked via a [ranking profile](#) using items from the basic properties or custom properties such as hire date, tiebreak, performance score, adherence score, etc. The possibilities are endless because you define the custom properties and the combination of properties.

The agent's preferences must fit within their assigned schedule template and the resulting agent's schedule may not match their preferences, especially if the agent's rank is low compared with others. Think of preferences as something nice to have but not required.

What is schedule availability?

Schedule availability defines the days and hours that an agent is available to work and requires administrator approval. If only using availability to create schedules, no ranking profile is needed. The resulting schedule will fit within the agent's availability if the availability fits within the schedule template. The schedule template will override approved availability, so the template should cover a wide range of start times and days off.

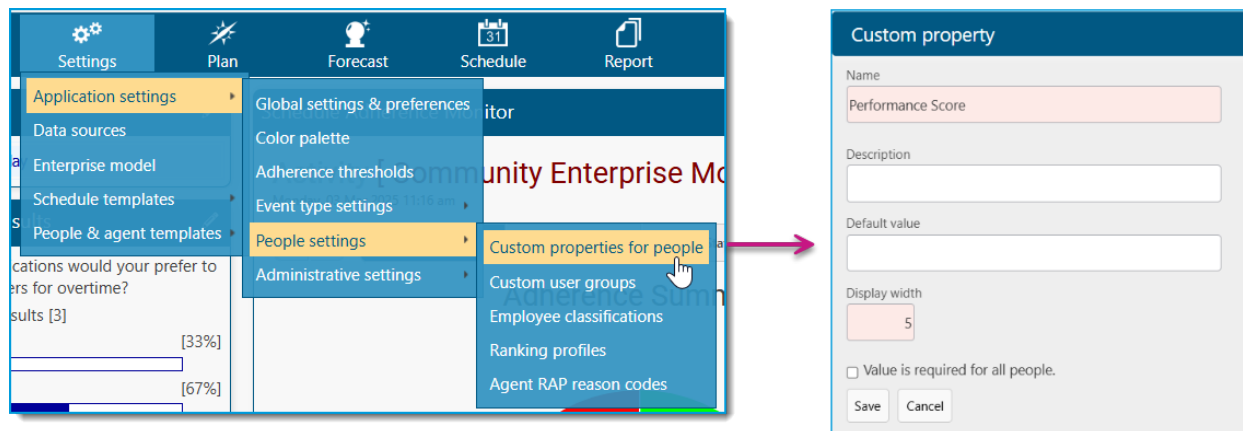
What is a Ranking Profile?

Ranking profiles tell CommunityWFM how to order agents during preference-based scheduling, shift bids, vacation bids, and can be used when offering overtime and voluntary time off via an ASAP. During preference-based scheduling, the highest ranked agent's schedule is created first then the next highest ranked agent and so on. The highest ranked agent is most likely to receive a schedule matching their preferences.

Only one ranking profile is required for a single preference-based scheduling run, and a ranking profile is not required for availability-based scheduling. Within a ranking profile, you can rank agents by choosing items from the basic properties (name, hire date, employee ID, tiebreak value) and custom properties from the employee profiles.

Custom profile

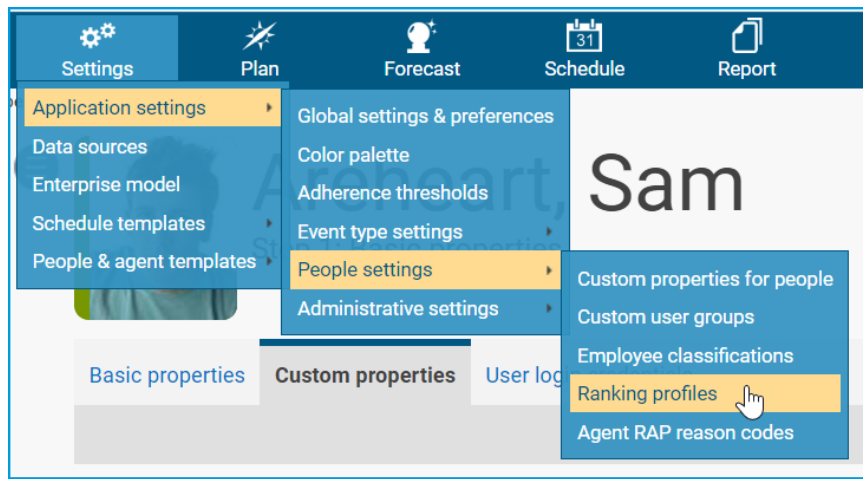
Create custom properties by navigating to Settings > Application Settings > People Settings > Custom Properties for People then select *Click here to create a new custom property*.



Note: If a ranking profile includes a custom profile property as one of the sort fields, then each participant must have a value for that custom profile property.

Common examples of ranking criteria include hire date, performance score and tiebreak value. You can choose several items within a single ranking profile. If, for example, your ranking profile contains hire date as the first option and tiebreak value as the second option, the software first looks at hire date for all agents involved. If two or more agents have the same hire date, the tie is broken using the second item (tiebreak value in this case). If there is still a tie, the tie is broken using alphabetical order of the agents' last names.

To create a ranking profile, navigate to Settings > Application settings > People settings > Ranking profiles.



Enter a **name** (required) and **description** (optional).

Select a **start time preference option**:

Average start time preference for all days of the week or use the preferred start time from the first scheduled day.

Start time penalty factor: How

CommunityWFM evaluates the quality of the schedule based on the mean start time (or first-day preference). If the value for this field is low ("Slight penalty") then a variance in start time only minimally influences the selection of a schedule. If it is high ("Significant penalty") then it magnifies the variance in start time for a

schedule. This start time preference penalty is then used to sort the schedules and pick the one with the smallest penalty value.

After saving, you will be able to configure the sorting criteria for this ranking profile.

Ranking profile properties

Create reusable sorting criteria for your people.

Step 1: Basic properties

Name
Seniority

Description

Start time preference option
Use the average start time preference for all days of the week

Start time penalty factor
10 (Significant penalty)

Save Preview

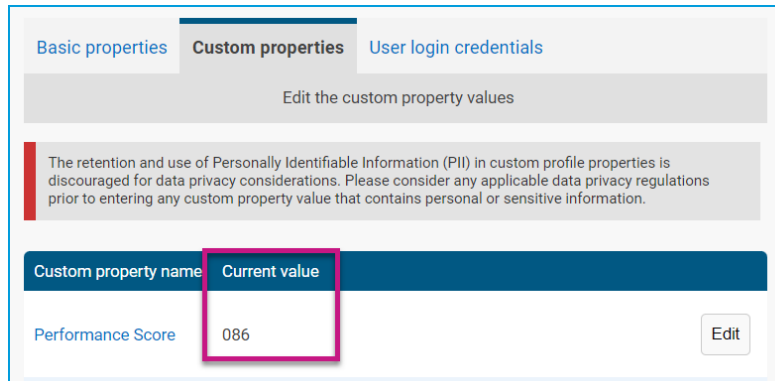
Step 2: Configure sorting criteria

Ordinal	Sort column	Comments
1	Hire Date	
2	Tiebreak Value	

Add sort option

Employee Profiles

Each agent should have the rank items populated, according to the ranking profile configuration. (i.e., if your ranking profile is set to use a performance score, then each agent should have a performance score in their profile).



Custom property name	Current value
Performance Score	086

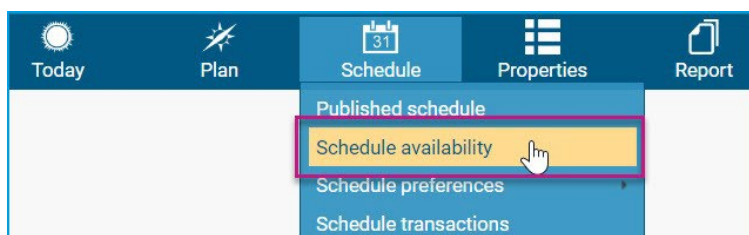
If using schedule preferences, each agent should be assigned to a floating or common-day floating schedule template.

If scheduling to availability, you can use floating, common day floating, or fixed schedule templates. Agents may also be assigned to rotating or composite templates, if those are composed of floating or common-day floating templates (if using preferences) or floating, common day floating, or fixed templates (if using availability).

Each agent should have availability and/or preferences populated. Agents can be given access to enter their preferences and availability (requires approval) or an administrator (or someone with access) can enter them.

Entering availability

Agents can report days and times when they are **not available** for scheduling. This request must be approved by an administrator. After approval, CommunityWFM will not create a schedule for that person that includes those days/times.



Reminder: when submitting an availability request, the day in the *Available?* column must be checked to apply. In the example below, the agent will never receive a schedule for Saturday or Sunday.

Entering Schedule preferences

Agents may enter and rank their schedule preferences for start time and day off and these do not require prior approval.

Susan may prefer a start time of 9 am while Roger likes to sleep in and not have a scheduled shift prior to 10 am. These preferences may include multiple start times (ranked by preference), days of the week, and whether days off should be together. Preferences will be considered but may not always be accommodated.

Start Time Preferences

Daily start times

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Start Time Preferences for Monday

Reference Number	Ordinal	Preferred Start Time	
11	1	Monday, 07:00:00 AM	▲ ▼ ✖
50	2	Monday, 07:30:00 AM	▲ ▼ ✖
49	3	Monday, 08:00:00 AM	▲ ▼ ✖
		Monday, 12:00:00 AM	🗑️

Apply to Other Days

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Replicate

Agent view

Schedule Day Preferences

Preference Priority Settings

Prioritize the start time preference over the day off preferences.
 Prioritize the day off preferences over the start time preferences.
 Do not prioritize either start time or days off, but instead use the most favorable combination for this agent's schedules.

Specify Requested Days Off

In this section, we need to identify the what days you would like to have **off** from work. You have been given 100 points to spread across the days of the week. In the box corresponding to each day, enter a number that indicates how important it is to have that day off. Higher numbers indicates that it is more important to have that day off, while lower numbers mean it is less important to have that day off. Please note that the total for all days must equal 100.

Day of Week	Relative Importance
Monday	50
Tuesday	20
Wednesday	10
Thursday	10
Friday	10
Saturday	0
Sunday	0
Total	100

Save Restore

Specify Day Pattern Rules

In this section, we need to determine what is more important to you having the requested days off or consecutive days off. If you would prefer that the scheduler honor the day off preference(s) over consecutive days off, then check the corresponding button. However, if you wish for the scheduler to give weight to consecutive days off over any particular day, then select that button.

Note that the schedule template assignment in effect for the schedule week dictates the opportunity to achieve consecutive days off.

I would prefer to have consecutive days off over having any specific day.
 I would prefer that the scheduler honor my specific days off over having consecutive days off.

Generate Working Schedules

Once the above items are in place, you are ready to generate schedules. Go to Schedule > Working Schedules and [Click Here to Create New Working Schedules](#).

Go through the options as needed.

For example, add agent templates if needed in the *Select schedule participants* list; configure holiday hours if needed in *Custom work habits & hours*.

If creating schedules for a typical week with no agent templates, go to *Generate optimized schedules* then *Generate schedule*. On the *Configure schedule task properties* page, if you're creating preference-based schedules, go to *What profile do you want to use for rank-based preferencing?* and choose the appropriate ranking profile. If you're creating schedules based on availability but not preferences, you can skip this step. Choose the other options as needed on this page then click *Go*.

Configure schedule task properties

Copy From Week of Nov 18 2024

What scheduling algorithm do you want to use?

Advanced block-demand schedule fit algorithm ▾

How do you define the people included in this schedule?

Use the schedule template assignments from the participant's time line ▾

What profile do you want to use for rank-based preferencing?

Seniority ▾

Where should the staffing data come from?

Published Forecast ▾

How should the off-phone time be fit into the schedule?

Place intervals inline with schedule interval placement ▾

How would you like to set your schedule bias?

Minimize staffing cost
Maximize coverage

10

Go

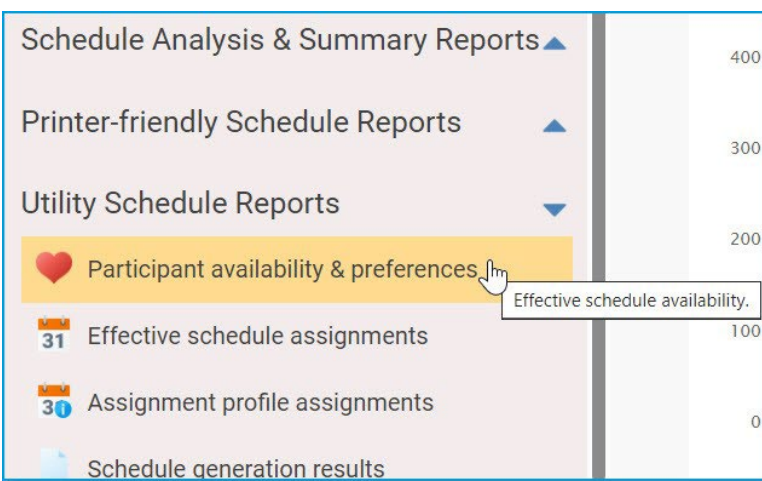
Manage Agent Schedules

After creating the schedule, go to *Manage agent schedules* and review / modify the schedules as needed.

Note: Each agent may receive a different schedule each week.

Availability & preferences report

To view a report of agent availability for a schedule week, open the **working** schedule then expand the Utility Schedule Reports section.



Effective availability report - Week of 10/07/2024

Status	Agent Name	Availability
✘	Areheart, Sam	No Availability In Effect, assume always available
✘	Azzarito, Deborah	No Availability In Effect, assume always available
✔	Badgett, Gregory	Mon(06:00:00 - 14:00:00);Tue(14:00:00 - 22:00:00);Wed(06:00:00 - 14:00:00);Thu(14:00:00 - 22:00:00);Fri(06:00:00 - 14:00:00);
✘	Barton, Jean	No Availability In Effect, assume always available

Publish This Schedule

After reviewing the schedules and relevant reports, navigate to *Publish this schedule* and publish the schedule.