GENESYS™

Workforce Management Agent Help

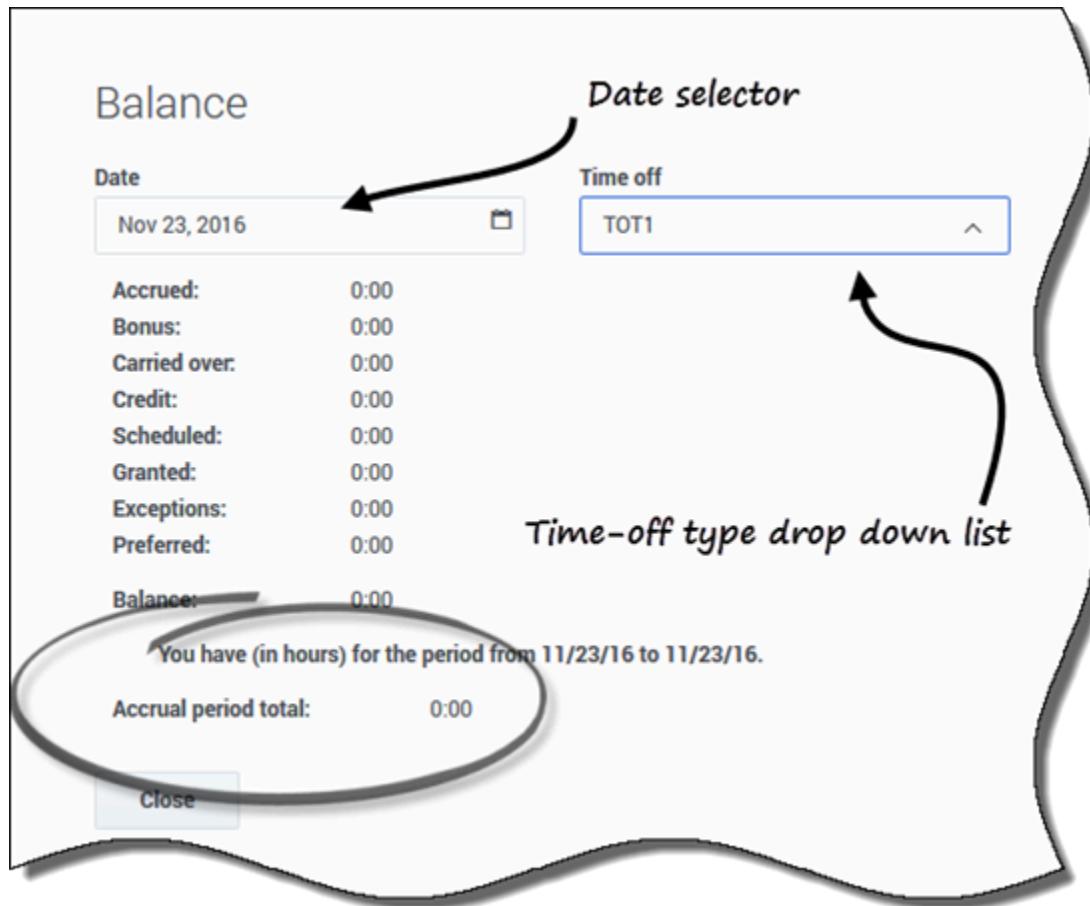Viewing your time-off balances

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Track your balances for different time-off types.

Related documentation:

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It's important for you to be able to track your balance for various types of time off. For example, if you are thinking about your vacation, click the date before the day you would like to start your vacation to see whether you will have accumulated enough time off by then to take it.

Tracking your balances

To view your time-off balances, click **Get Balance** in the upper-left corner of either of the **Time Off** views (Calendar or Details).

The **Balance** dialog opens, showing your time-off balance for the date selected in the calendar.

In the open dialog box, you can change the date and/or select a different time-off type from the **Time off** drop-down list to view its balance.

Balance categories

This table explains each category that appears on the Balance dialog.

Accrued	Total accrued time-off hours for the current period, up to the selected day. (To view the total accrued hours for the entire period, select the last day of the period.)

Bonus	Total bonus time-off hours. Bonus hours are configured by your supervisor or scheduling manager. They are included in your total time-off balance.
Carried Over	Total time-off hours carried over from the previous period. Some companies limit the number of hours that you can carry from one year to the next. **Tip** This information is for the current time-off period. This is the time since the last carry-over date (often January 1), or, if the carry-over date has not yet occurred, the time since your date of hire. The carry-over date might be different for the different types of time off.
Credit	Total time-off hours that can be taken in advance, if applicable. Some companies allow you to request more time off than you currently has accrued, with the expectation that you will accrue the necessary time before the end of the year.
Scheduled	Total scheduled time-off hours for the period, up to the selected day. To view the total scheduled hours for the entire period, select the last day of the period. You cannot remove Scheduled or Granted time off in **Time Off** module, but can remove Preferred time off.
Granted	Total requested time-off hours that have been granted. To view the total granted hours for the entire period, select the last day of the period.
Exceptions	Total part-day exceptions used as time-off hours that have been granted.
Preferred	Total hours of *preferred time off* (requested, but not yet declined, granted or scheduled). To view the total preferred hours for the entire period, select the last day of the period.
Balance	Total time-off hours for the current period, up to the selected day. The balance is calculated as the sum of accrued, bonus, carried-over, and credit hours, minus granted, preferred, exceptions, and scheduled hours. **Tip** This balance's limit can be exceeded. If the limit is reached before the end of the Accrual Period, you can progressively accrue more time off if you request it, and if your supervisor grants it.
Accrual Period Total	Total hours of time off for which you are eligible in the current period. This value changes only when you select a day in a different time-off period.
Lead Time (weeks)	If the supervisor has enabled time-off auto-granting, you can enter your time-off preferences at least this number of weeks before the first desired time-off date. Your preferences are granted

| | automatically if your absence would not excessively burden the company, and if you have enough time-off hours available to cover the request. |
| | If your supervisor has not enabled auto-granting, **Lead Time** is not displayed in **Balance** dialog. |

When time-off types no longer apply

The **Time off** drop-down list box in the **Balance** dialog displays all the time-off types that are configured for your site. Some of these might not be relevant to you.

You can create, edit, delete, or recall time-off requests only for time-off types that are assigned to you. Time-off types that are not assigned to you appear in the drop-down list with dash before the name (for example, -TO1).

Workforce Management enables you to see time-off types that are not assigned to you, but you cannot perform tasks with them (such as requesting time off or viewing your time-off balance).