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# Workforce Management Agent Help

Time off

7/26/2024

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- Agent

View your time-off request details and customize these views to suit your preferences.

### **Related documentation:**

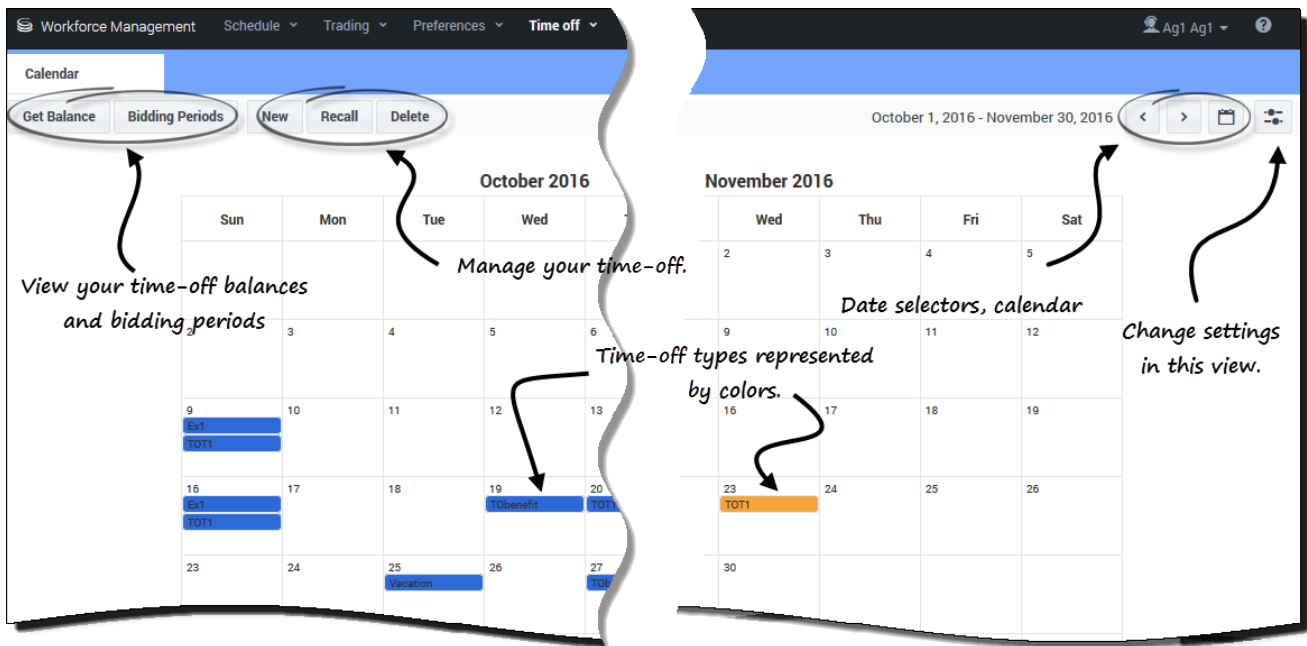
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Clicking **Time Off** in the Menu bar displays a drop-down menu, from which you can select one of two views, Calendar and Details. Use these views to:

- View your requested time off in the calendar, with its status.
- Request time off.
- Edit, recall, or delete time-off requests that have not yet been granted or scheduled.
- View your time-off balance for any desired date.
- View bidding periods for selected dates.

## Viewing time off in the calendar

Use the **Calendar** view to view all of your time-off requests and their statuses. You can perform all of the tasks required to effectively manage your time-off requests in this view.



You'll find the following settings and controls in this view:

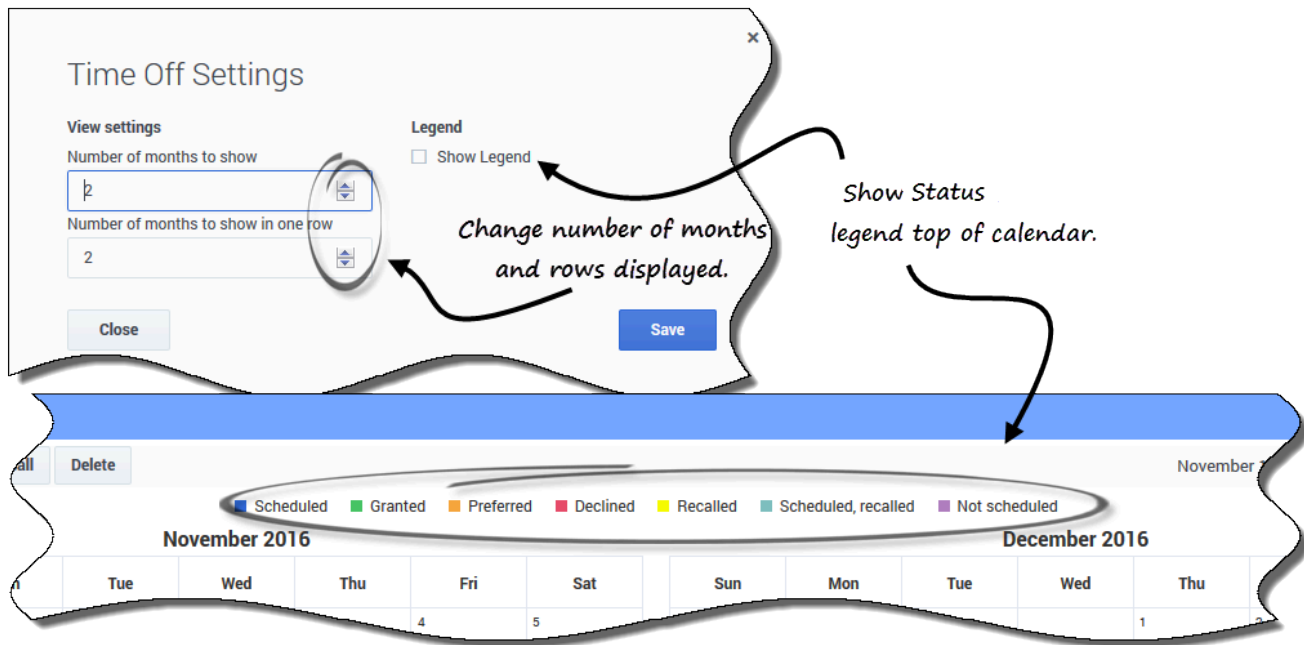
- **Get Balance**—Use this button to open the **Balance** dialog and view your time-off balances.
- **Bidding Period**—Use this button to view bidding periods or change your status in the bidding process.
- **New, Recall, and Delete**—Use these buttons to make, recall, or delete time-off requests.
- **Date selectors and Calendar**—For a description how to use these controls, see [Changing the date](#).
- **Settings**—Click this icon to open a dialog box that enables you to change the data display in this view.
- **Legend**—Each status displayed in the calendar (Declined; Granted; Preferred; Scheduled, Recalled; Scheduled; Not Scheduled; and Recalled) is represented by its own color. To display the legend in this view, see [Changing the view settings](#).

### Tip

If you do not see **Time Off** in the Menu Bar, then the Time-Off Planner is not enabled for your contact center.

## Changing the view settings

You can change the way you view information in the **Calendar** view by changing the settings to display only the current month (default) or multiple consecutive months, or display a legend that describes the color-coded statuses.




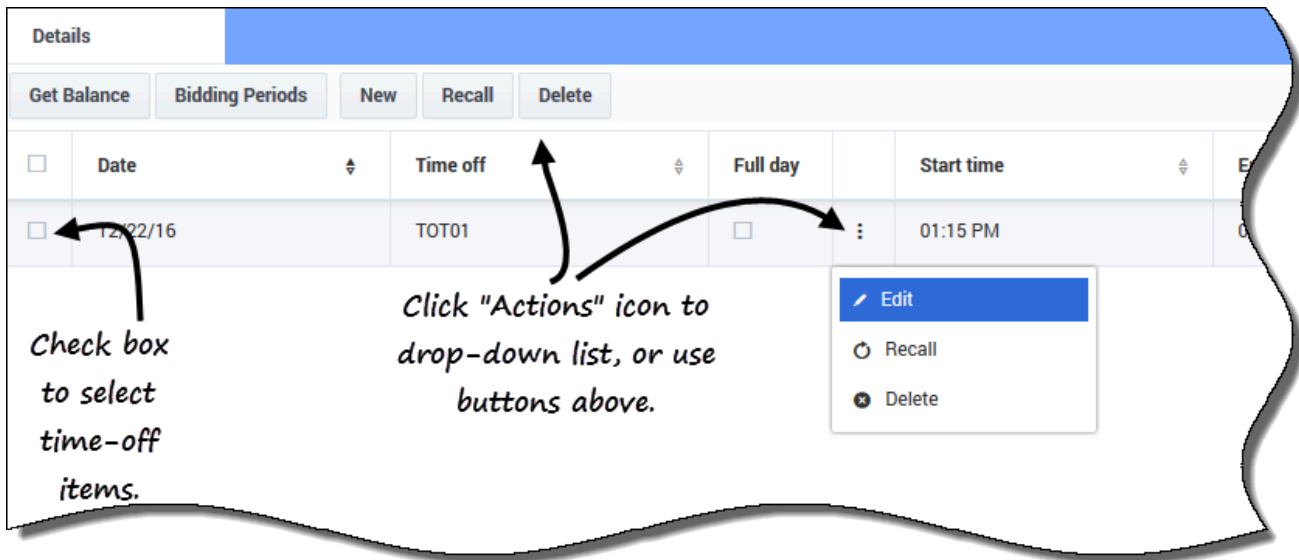
To change the settings in this view:

1. In the upper-right corner, click **Settings**.  
**The Settings dialog box opens.**
2. To change the number of months and how they are displayed, enter a number in these two fields or use the up or down arrows:
  - **Number of months to show**
  - **Number of months to show in one row**
3. To display the statuses legend above the calendar, enter a check mark in the **Show Legend** check box.
4. **Save** the settings (or discard them by clicking **Close**).

## Viewing time-off details

Use this view to see all of the details for each of your time-off requests in a table. In the **Details** view, the following information is displayed in columns and rows. Each column can be sorted in

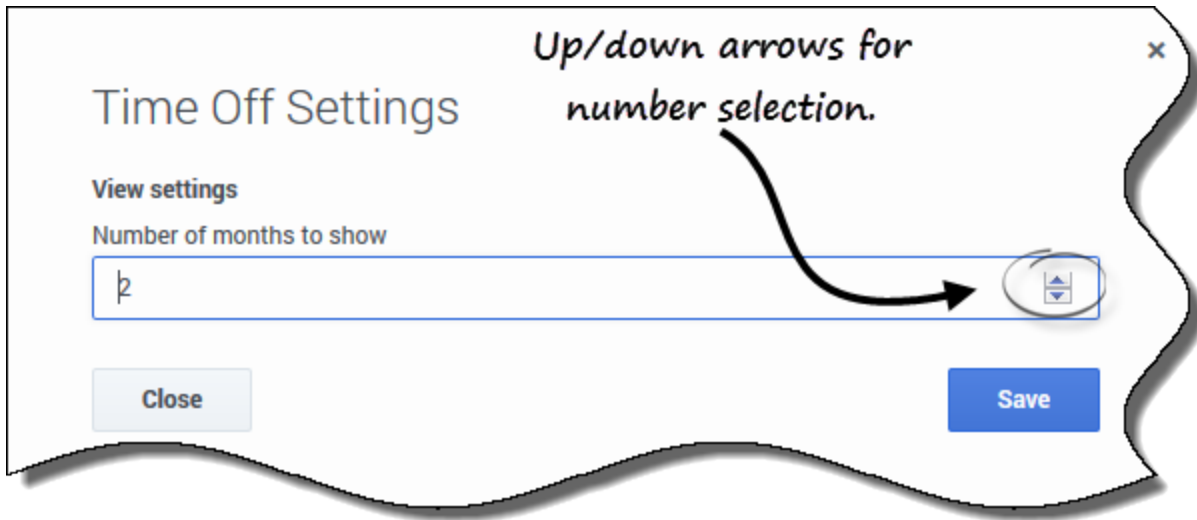
ascending or descending order by clicking the arrow controls  in the column:



- **Check boxes**—Select the check boxes when you want to take action (recall, or delete a time-off request). Select or clear the check box in the header to operate all check boxes in the column (and thus, all rows) with one click.
- **Date**—The date that time-off is requested.
- **Time off**—The time-off type.
- **Full day**—Indicates whether or not the request is for a full day. If the time-off request is for a full day, the check box is checked. If the request is for a part-day, the check box is unchecked.
- **Actions**—Click this icon to open a drop-down list of actions, enabling you to edit, recall, or delete the item in that row.
- **Start time**—The time when the time-off begins.
- **End time**—The time when the time-off ends.
- **Paid hours**—The number of paid hours for the time-off period.
- **Status/reason**—The status of the time-off and the reason why the WFM system set a particular status for this time-off request, such as Declined or Not Scheduled.
- **Comments**—Comments are notes that you can enter when submitting or editing time-off requests.

## Changing the view settings

You can change the settings in the **Details** view to display only the current month (default) or multiple consecutive months.



To change the settings in this view:

1. In the upper-right corner, click **Settings**.  
**The Settings dialog box opens.**
2. To change the number of months that display in this view, enter a number in the **Number of months to show** field, or use the up or down arrows.
3. **Save** the settings (or discard them by clicking **Close**).