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Workforce Management Web for Supervisors (Classic) Help

Agents Time Off

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- Supervisor






Manage time-off rules and time-off types for an agent.

Related documentation:

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In the **Time Off** pane, you can add, edit, and delete time-off rules and time-off types that are associated with selected agents. Use the controls in the top-right corner of the following panes to complete the described tasks:

Time off controls

-  **Show Historical** *check box*—Enter a check mark to display time-off rules that contain historical data (the selected agent's time-off balance).
-  **Associate Time-Off Rule and Time-Off Type with Agent**—Click to associate the selected agent with time-off rules and time-off types.
-  **Remove Time-Off Rule and Time-Off Type association from Agent**—Click to disassociate the selected agent from time-off rules and time-off types.
-  **Save Now**—Click to save any changes.
-  **Help**—Click to view a Help topic about the **Time Off** pane.

Tip

If you do not have at least one of the Edit Time Off privilege in the **Agents** view, the **Associate** and **Remove Time-Off Rules** icons are disabled and you cannot make these changes.

Historical data in time-off rules

Historical data refers to the calculated balance in time-off rules. When the **Show Historical** check box is checked or enabled, the list of time-off rules (available for selection) will include rules that have calculated balances. If you select a rule, the Time-Off Rule Assignment Properties pane opens, displaying the details of the rule's assignment, calculated carry-over balances, and time-off types. The **Show Historical** check box is cleared by default.






Time-off rules that contain historical data can be deleted, but it is not recommended, because it can affect the agent's time-off balance.

Assigning time-off rules and types

Use the **Time-Off Rule Assignment Properties** pane to assign time-off rules and types to agents to manage their accrued and awarded time-off hours. Use the controls and procedures described in this topic.

Associating time-off rules and types with agents

To associate a time-off rule and time-off types with the selected agent:

1. In the **Agents Properties** pane, click **Time Off**.
2. Click **Associate Time-Off Rule and Time-Off Types with Agent**  .
The Time-Off Rule Assignment Properties pane opens.
3. Select a **Time-Off Rule** from the drop-down list .
4. Enter a **Start Date** and **End Date**, or click within either field to open a calendar, from which you can select a date.
The Start Date is pre-populated with the current date, but you can change it, if necessary. If you check the box at end of the End Date field, WFM Web enters the current date automatically.
5. Click **Add Time-Off Types to a Time-Off Rule**  .
The Time-Off Types pane opens.
6. Select one or more time-off types from the list and then, click **Apply**  .
To find a specific types, enter criteria in the Search field. For example, enter the name of the each time-off type you want to find.
7. After the selected time-off types appear in the **Properties** pane, in the **Transfer Balance** column you can:
 - Leave the check box enabled (checked by default) to carry over the balance from the previous rule.
 - Clear the check box to accrue a new balance for this rule.
8. Click **Apply**  .
9. In the **Time Off** pane, click **Save Now**  .

Editing time-off rules and types associations



To edit an existing time-off rule and time-off types associated with an agent:

1. In the **Time Off** pane, select the rule you want to edit.

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2. The **Time-Off Rule Assignment Properties** pane opens.
 3. Make the necessary changes, following steps 3-9 in Associating time-off rules and types with agents.




Deleting time off

To delete a time-off rule and time-off types currently associated with an agent:

1. In the **Time Off** pane, select the rule you want to delete.
2. Click **Remove Time-Off Rule and Time-Off Types association from Agent** .
3. When the **Confirmation** dialog opens, click **Yes** to proceed or **No** to cancel the action.
4. In the **Time Off** pane, click **Save Now** .

Time-off rule assignment properties

Use the following controls in the Time-Off Rule Assignment Properties pane:

-  **Apply**—Click to associate the configured time-off rule and time-off types with the agent.
-  **Close**—Click to close the pane.
-  **Help**—Click to view a Help topic about the **Agent Time-Off Rules Properties** pane.
- **Time-Off Rules drop-down list**—Click to select a time-off rule that controls how the agent's time-off hours are accrued/awarded.
- **Start Date**—Click to open a calendar, from which to choose a start date for the selected time-off rule. The default date is the current day.
- **End Date**—Click to open a calendar, from which to choose an end date for the selected time-off rule.
- **Current Day check box**—Click to automatically populate this field with the current date.

Carry-over details

In the **Time Off** tab, time-off rules that have calculated carry-over balances are colored gray, and when selected, open the **Time-Off Rule Assignment Properties** pane, displaying the following **Carry-Over Details** controls:

- **Carried Hours**—The number of hours that have been carried over for this agent.
- **Accrued Hours**—The number of hours that have accrued for this agent.
- **End Date Balance**—The number of hours that are left at the end date for this rule.

- **Awarded Bonus Hours**—The number of awarded bonus hours accrued for this agent.
- **Used Bonus Hours**—The number of bonus hours that this agent has used.
- **Expired Bonus Hours**—The number of bonus hours that have expired.
- **Scheduled Hours**—The total number of scheduled hours for this agent.
- **Granted Hours**—The total number of hours that have been granted for this agent.
- **Preferred Hours**—The total number of preferred hours for this agent.
- **Declined Hours**—The total number of hours that have been declined for this agent.






Time-off rules that have no calculated carry-over balance are colored black and when selected, opens the **Time-Off Rule Assignment Properties** pane without displaying the **Carry-Over Details** controls.

The screenshot shows the 'Time-Off Rules and Time-Off Types Associated With This Agent' pane. It contains a table with columns: Time-Off Rule, Time-Off Type, and Start Date. The table lists several rules, including '40 hrs' and 'COFF'. A red arrow points from a 'calculated' label to a row with a carry-over balance, and another red arrow points from a 'not calculated' label to a row without. A black arrow points from a 'Carry-Over Details' label to the 'Carry-Over Details' section in the 'Time-Off Rule Assignment Properties' pane.

Clicking calculated carry-over balances in this pane, opens "Carry-Over Details".

Time-off types

Use the following controls in the Time-Off Types pane:

-  **Add Time-Off Types to a Time-Off Rule**—Click to add time-off types to a time-off rule.
-  **Remove Time-Off Types from a Time-Off Rule**—Click to delete time-off types from a time-off rule.
-  **Apply**—Click to apply the selected time-off types to the time-off rule assignment.
-  **Close**—Click to close the pane.
-  **Search**—Enter search criteria to find time-off types quickly.

Time-off bonuses

Manage agents' time-off bonuses and understand the how bonus end dates affect carry-over hours.

When you create time-off rules, you configure time off to be either accrued or awarded. On the other hand, time-off bonuses are awarded, not accrued. You configure them (add, edit, and delete) as described in the procedures below.

Tip

If you do not have the Edit Time-Off Bonuses privilege in the **Agents** view, the **Add** and **Delete Time-Off Bonuses** icons are disabled.

Understanding bonus end dates

Time-off bonuses may or may not have a set End Date property, but it's important to understand how the **End Date** property affects the way in which WFM counts unused hours when processing carry-over hours.




If the time-off bonus *has* a specified end date, WFM processes carry-over as follows:

- If the end date of the bonus time is before the carry-over date, the bonus expires and WFM does not carry over any hours.
- If the end date of the bonus is after the carry-over date, the bonus remains assigned after the carry-over date (it doesn't expire on carry-over date) and WFM fixes the used hours in the carry-over record, meaning the unused hours pass to the new carry-over period and they are not subject to the maximum carry-over hours constraint.

If the time-off bonus *does not have* a specified end date, WFM carries over the bonus hours to the next configured carry-over date. The total number of hours carried over is subject to the maximum carry-over hours constraint. The bonus expires after the carry-over date. Any used hours are updated as they were before.

Adding bonuses

To add a time-off bonus for a selected agent:

1. Select an agent and then, in the **Agent Properties** pane, click **Time-Off Bonuses**.
The Agent Time-Off Bonuses pane opens.
2. Click **Add Agent Time-Off Bonus** .
The Time-Off Bonuses Properties pane opens.
3. Select a **Time-Off Type** from the drop-down list.
4. Enter a **Start Date** and **End Date**, or click within either field to open a calendar, from which you can select a date.
The Start Date is pre-populated with the current date, but you can change it, if necessary. If you check the box at end of the End Date field, WFM Web enters the current date automatically.
5. In the **Bonus Hours** field, enter the number of hours you want to award the selected agent.
6. In the **Comments** field, enter any additional relevant information.
7. Click **Apply** .
8. In the **Agent Time-Off Bonuses** pane, click **Save Now** .



Editing bonuses

To edit an existing time-off bonus:

1. In the **Agent Time-Off Bonuses** pane, select the bonus that you want to edit.
2. When the **Time-Off Bonus Properties** pane opens, make the necessary changes following the steps 3-8 in Adding Time-Off Bonuses.

Deleting bonuses

To delete an existing time-off bonus:

1. In the **Agent Time-Off Bonuses** pane, select the bonus you want to delete and click **Delete Agent Time-Off Bonus** .
2. When the **Confirmation** dialog opens, click **Yes** to proceed or **No** to cancel the action.
3. Click **Save Now** .