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Workforce Management Web for Supervisors (Classic) Help

Time-Off Limits

Contents

- [1 Setting time-off limits](#)
 - [1.1 The Time-Off Limits table](#)
- [2 Setting minimum time-off limits](#)
- [3 Set Values dialog](#)
- [4 Set Time-Off Limits Wizard](#)
 - [4.1 Factors impacting agent availability](#)
 - [4.2 Choose dates](#)
 - [4.3 Specify weekly pattern](#)
 - [4.4 Specify date range values](#)



- Supervisor

Use the Time-Off Limits feature to control the number of agents allowed to take time off, thereby ensuring your service level objectives are not adversely affected.

Related documentation:

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Under the **Calendar** module, use **Time-Off Limits** to control the number of agents allowed to take time off so that you do not adversely affect the ability to meet service objectives. You can configure time-off limits for the agents who perform a specific activity, all of the agents on a team, or all of the agents in a site. You can also:

- Set limits for the maximum number or maximum percentage of agents who can be on time off at any one time.
- Set different time-off limits for each timestep during the day, enabling more agents to take time off during non-peak work periods.
- See the actual numbers percentage of agents who are scheduled for time off and compare your limits with the actual values.
- Set minimum time-off limits for each timestep. See Setting minimum time-off limits for details.

Tip

The time-off limits apply to all time-off types that have the **Counts toward time-off limits** parameter selected. You cannot set separate time-off limits for each time-off type.

If the **Counts toward time-off limits** check box is cleared for a time-off type, no time-off limits apply to that time-off type.

After the Master Schedule is published, the Calendar service still allows Agents to enter time-off items. However, these items are automatically resolved as **Not Scheduled**, with the **Reason** *Item is Not Scheduled because different schedule has already been built for this day*. Also, these items are not checked against the time-off limits, because they are not scheduled. This is normal behavior, because planning (the Calendar) usually is done before scheduling.

Setting time-off limits

Use this procedure to modify the Time-Off Limits table manually, or use the Set Time-Off Limits

Wizard to set these limits. Also, see Factors impacting agent availability for more information about the impact of setting time-off limits.

1. Select the **Calendar** tab.
2. Select **Time-Off Limits** from the **Views** menu.
3. Select a site, multi-site activity, team, or activity in the Objects tree. You cannot select a business unit or an individual agent.
4. Select the period to be displayed in the table: **Year** (default), **Month**, or **Week**. The granularity associated with the selected period appears in the read-only **Granularity** text box.
5. Enter or select a date by using the date-range selector at the top of the window.
If you select a day other than the first day of the selected period, the display defaults to the first day. For example, if you select **Month** and then select August 12, the display shows August 1-31.
6. To remove the column from the table, clear the check box beside the name of that column.
The table displays the current data for the object and dates that you selected. See Time-Off Limits table for an explanation of the data presented in each column.

Tip

The set of columns repeats seven times in each row. Each repeat contains the values for one day of the week.

7. For each period (represented by a row), enter a value directly into the **Max. Agents** or **Max. %** cell, or both. You can copy and paste values from one cell to another using the standard Windows Copy and Paste functions. If you enter values into both columns, WFM applies the lower limit.
 - **No Time-Off Limits**—Leave the cell blank.
 - **No Time Off Allowed**—Enter 0.
 - **Some Time Off Allowed**—Enter the number or percentage of agents who are allowed to be on time off.

Cells with gray backgrounds are not editable. They either fall outside the selected period or contain values that WFM generates automatically.

Tip

If you have chosen **Week** as the period, the minimum row appears. It displays the lowest limit entered into any cell. See Setting minimum time-off limits for how to use this feature.

8. If you want to set different values for a specific date range, click the **Set Values** button, which is located on the **Action** toolbar, or select **Set Value** from the **Actions** menu. See Set Values dialog for instructions on using this feature.
9. To keep your changes, click the **Save** button, which is located on the **Action** toolbar, or select **Save** from the **Actions** menu.

Important

If you reduce the time-off limit for a specific period or if you assign agents to another team after a time-off period is scheduled, the limits for a particular period may be exceeded. In this case, agents retain any previously planned or scheduled time off, even if the limits are exceeded.

The Time-Off Limits table

The **Time-Off Limits** table displays rows for each week (if the period is **Year** or **Month**) or for each 15-minute timestep (if the period is **Week**).

If you selected the **Week** period, the table also displays a Minimum row, which displays the lowest value set in any timestep during the day.

The columns in this table are:

- **Week/Timestep**—If the selected period is **Year** or **Month**, this column contains the dates of each week in the period. If the period is **Week**, the column lists each 15-minute timestep in a day.
- **Max. Agents**—Enter an integer value for the greatest number of agents in the selected site, team, or activity who are allowed to have time off during the selected period. This must be a whole number, so fractions are rounded down.
- **Max. %**—Enter a percentage value for the greatest number of agents in the selected site, team, or activity who are allowed to have time off during the selected period.
- **Max. % Agents**—WFM automatically calculates, to the nearest whole number, the maximum number of agents who can have time off based on the percentage value that you entered. This column is read-only.
- **Actual Agents**—The actual number of agents in the selected site, team, or activity who are scheduled for time off during the selected period. If a schedule is unavailable for that day, agents with granted or preferred Time Off also count as Actual agents with Time Off. This column is read-only.
- **Actual %**—The actual percentage of agents in the selected site, team, or activity who are scheduled for time off during the selected period. This column is read-only.

Setting minimum time-off limits

To set minimum limits:

1. Select the **Week** period.
2. Enter time-off limits in the cells for each timestep.
By default, the minimum row shows the lowest limit entered into any cell of a column.
3. To set the minimum for multiple timesteps at once, enter a value directly into one of the cells in the **Minimum** row.
This new minimum value is automatically applied to all cells that contain a lower time-off limit. Cells with higher time-off limits are unaffected.
The minimum value set in the **Week** view is displayed as the **Daily** value in the **Year** and **Month** views.

Tip

Although you cannot view the **Minimum** row if you select the **Month** or **Year** view, entering a time-off limit that is lower than the current minimum into either of these views automatically changes the minimum value shown in the **Week** view.

Set Values dialog

Use the **Set Values** dialog to adjust the maximum number or percentage of agents who can have time off at any one time during a specified period.

- Use this feature to adjust the maximum for periods, such as holiday seasons, when you might want to have a different maximum value than during the rest of the year.

To use the **Set Values** dialog box:

1. Select the **Calendar** tab.
2. Select **Time-Off Limits** from the **Views** menu.
3. Select a site, multi-site activity, team, or activity in the Objects tree. You cannot select a business unit or an individual agent.
4. Select **Set Values** from the **Actions** menu, to display the **Set Values** dialog box.
5. Enter a start date and end date for the period.
6. Enter a value for one or both of the following fields:
 - **Max Agent**—The maximum number of agents who can have time off during the specified period. You must enter a positive whole number.
 - **Max %**—The maximum percentage of agents.
 - **No Time-Off Limits**—Leave the text box blank.
 - **No Time Off Allowed**—Enter 0.
 - **Some Time Off Allowed**—Enter the number or percentage of agents who are allowed to be on time off.
7. Click **OK**, or click **Cancel** to discard your changes.

The **Set Values** dialog box closes, and the new values appear on the Time-Off Limits table.

Set Time-Off Limits Wizard

The following procedure describes how to open the Set Time-Off Limits Wizard and provides an overview of the steps you'll follow when using it. Click the links to see the details of the wizard

screens named in the procedure.

1. Select **Set Limits** from the **Action** menu, or click **Set Limits**  in the toolbar.

**The wizard opens to the first page, Choose Dates.
There are potentially two more screens in the wizard**

- **Specify Weekly Pattern of Possible Days Off**
- **Specify Date Range Values of Possible Days Off**

You can finish the wizard from any page unless you select the Estimate possible days off check box on the Choose Dates page.

2. At each page, select **Next** (or **Finish**) after completing your data entry.
After you click Finish, WFM calculates the new limits and modifies the Time-Off Limits table, according to your choices.

Factors impacting agent availability

When setting time-off limits, be aware that WFM calculates the number of available agents for every timestep according to:

- The start and end of contract availability—The agent is not available outside of the availability interval.
- The earliest start and latest end time of shifts assigned to the contract—This might further limit the agent's availability interval.
- The activity open hours—Even if the target is not an activity, the agent's availability is limited by the earliest open and the latest close time of the activities, for which the agent is qualified.
- The Rotating Pattern—Strict rotating day-offs, explicitly specified start and end times, and earliest and latest times of the rotating shift.
- Optionally, granted day-offs and full-day exceptions.

Choose dates

Use the **Choose Dates** page in the Set Time-Off Limits wizard to specify the following values:

Start Date <i>spin box</i>	Enter or select the date that begins the time period for time-off limits that are to be estimated and applied.
End Date <i>spin box</i>	Enter or select the date that ends the time period for time-off limits that are to be estimated and applied.
Time-off Limit <i>% field</i>	Enter a number to specify the maximum percentage of agents who can be on time off at any one time.
Reduce available agents by <i>___% field</i>	Enter a number to specify the percentage of agents who are to be excluded from the wizard's calculations.
Consider granted Calendar items <i>check box</i>	Select to specify that granted items for agents are taken into account by the wizard.
Estimate possible days off <i>check box</i>	Select to specify that the weekly pattern will be

used in estimates. If this check box is cleared (the default setting), then this is the final wizard page.
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- Click **Next** to continue (if the **Estimate possible days off** check box is selected) or **Finish** to end the wizard (if the **Estimate possible days off** check box is cleared).
- Click **Cancel** to exit the wizard and make no changes.

Specify weekly pattern

In the Set Time-Off Limits Wizard, use the **Specify Weekly Pattern of Possible Days Off** page to design a weekly pattern by specifying the percentage of possible days off for agents in each weekday.

Tip

This page is part of the wizard only if you selected the **Estimate possible days off** check box on the previous Choose Dates) page.

About the table

The table on the **Specify Weekly Pattern of Possible Days Off** page of the wizard has seven rows, one for each weekday (Sunday through Saturday) row, and these columns:

% of days off	Enter a number to specify the percentage of agents who will receive a day off on each weekday. This is the only editable column in the table, and it can be empty to specify that no value was specified. The value in this column cannot exceed the value in the Max % column.
Agents with days off	This column displays the calculated number of agents, in decimal format, using the entered percentage in the % of days off column.
Max %	The maximum percentage of agents who can receive a day off.
Total agents	The calculated total number of available agents, averaged for each weekday in the period.
Standard %	The <i>standard</i> percentage of total agents who can receive a day off, estimated according to the minimum/maximum number of days off per week and the minimum/maximum number of weekend days off.

About the buttons

- Click **Next** to continue or **Finish** to end the wizard.
- Click **Cancel** to abandon the wizard and make no changes.

Specify date range values

In the Set Time-Off Limits Wizard, use the **Specify Date Range Values of Possible Days Off** page to specify the maximum number of agents and date range.

About the table

The table on this page has a single row for every day in the time period (a week, a month, or a year) that is specified in the **Time Off Limits** table.

Tip

This page is part of the wizard only if you selected the **Estimate possible days off** check box on the previous (Choose Dates) page.

If you specified a weekly pattern on the previous page, then the value for each date is calculated by multiplying the percentage for the appropriate weekday from the weekly pattern by the total number of agents, and then dividing by 100.

If you did not specify a weekly pattern, or if the value in the pattern for a corresponding weekday is empty, then the value for each date is equal to the value for the same date in the **Standard** column.

The columns in the table are the following:

Date	Displays one row for each day in the date range (a week, a month, or a year)
Weekday	Displays the day of the week for the date in this row.
Agents with days off	Enter the number of agents who could receive a day off on each date. This column contains the only editable values in the table. All other values are calculated or fixed. The value in each cell can be as low as 0 and as large as the corresponding Max value.
Max	Displays the calculated maximum number of agents who can receive a day off.
Total agents	Displays the calculated total number of agents who are available for each date.
Standard	Displays the calculated "standard" number of agents who can receive a day off, estimated according to the minimum/maximum number of days off per week and the minimum/maximum number of weekend days off.

About the buttons

- Click **Finish** to end the wizard.

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- Click **Cancel** to abandon the wizard and make no changes.