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Workforce Management Web for Supervisors (Classic) Help

Time-Off Rules

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- Supervisor

Learn how to use time-off rules to control how agents' time-off hours are accrued and awarded, and define options for time-off requests.

Related documentation:

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One example of how you might use time-off rules is to set different accrual rates for paid time off depending on how long an agent has been employed.

Use the Time-Off Rules panes to:

- Create and edit time-off rules includes setting Properties and Rules for requests
- Delete time-off rules
- Copy time-off rules
- Associate agents and time-off types with a time-off rule

You can configure:

- Multiple time-off rules for each time-off type
- A single time-off rule for multiple time-off types
- A single time-off rule for one time-off type

Here's how they work

The following points explain how time-off rules work:

- Time off can be either accrued or awarded.
- If you change a time-off rule, the agent's carry-over time-off hours for that time-off type are calculated immediately, and the new rule applies from the time of the change. Time-off rules can change during configuration of the site, the agent, or the time-off rule.
- If agents with time-off rules for one or more time-off types are transferred to a different site during synchronization, the time-off rules associated with the agents remain, but they are no longer active. To enable agents to continue to accumulate time off, you must manually assign agents time-off rules for the new site. When WFM calculates carry-over for these agents, it calculates the time off at the old rate until the Stop Date and at the new rate from the Stop Date until the Carry-Over date.

Tip

Time-off carry-over occurs automatically by default. You can turn it off in the WFM Server Application options.

- If an agent becomes unassigned (is no longer associated with a site) he or she keeps the assigned time-off rules. However, WFM sets the date, on which the agent was removed from the site as the Stop Date, and time off is accrued, based on the rules from the former site only up to that date. The agent can continue to accrue time off, only if you assign him/her to a site and assign another time-off rule.
- If an agent is unassigned from a time-off rule for any time-off type (by setting the End Date for this time-off rule) and is not assigned this time-off type by any other time-off rule (no other record exists with a Start Date for this time-off type) then the agent can request time off for this time-off type but the balance is no longer accrued.

Tip

To understand how time-off rules or constraints affect agent preferences, see [Changing preference statuses](#).

Configuring the rules

The Time-Off Rules panes, which include Properties, Rules for Requests, and Assignments, enable you to create, edit, delete, and copy time-off rules, configure rules for requests and assign time-off rules.

Creating the rules

[Link to video](#)

To create a time-off rule, watch the video and/or follow this procedure:

1. In the **Time-Off Rules** pane, click **New**  .
The Properties pane opens.
2. Configure the time-off rules properties, as required.
3. Click **Save Now**  .

Next Steps:

- Configure rules for time-off requests. See Rules for requests and part 2 of this video series.
- Assign agents and time-off types to this rule. See Assigning Time-off rules and part 3 of this video series.

Rule properties

You can configure the following properties for Time-Off Rules:

- **Name**—Accept the default name or enter a different name. The name must be unique within the site.
- **Type**—Select one of two types:
 - **Accrued**—A certain number of time-off hours accumulate for each period worked.
 - **Awarded**—Time off is given as a set amount for the year. For example, paid time off is usually accrued, whereas holidays are awarded.

Tip

The Type field is enable only when the time-off rule is created. Thereafter, it is read-only.

- **Ignore accrual settings** (resulting in unlimited balances, if this rule is used)—Select this check box to disable:
 - All other controls in the **Properties** pane.
 - The Estimated daily paid hours and Estimated weekly paid hours in the **Rules for Requests** pane. Default setting: cleared (disabled).

Tip

Use the default setting for special circumstances, such as sick days, that are subject to time-off limits but do not count against an agent's time-off balance.

- **Number of hours earned**—Enter the number of hours that can be accrued every period in the hh:mm format.
- **For every**—Enter a number for how often the specified hours are accrued and then select the unit for the number (hours, days, weeks, months, or years) from the drop-down list.

Important

Awarded time off must be entered as x hours per 1 Year. You cannot select any other period. Synchronization can affect an agent's time-off accrual. If agents with time-off rules for one or more types of time off are transferred to a different site during synchronization, the time-off rules remain associated with the agents, but they are no longer active. You must manually assign time-off rules that are configured for the new site to the agents.

- **Limit the time-off balance to the following value**—Select this check box to set a limit to the total number of time-off hours an agent can accumulate.

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- **Hours that can be carried over to the next year**—Enter the number of time-off hours that can be carried over into the next yearly period. At carry-over, bonus and accrued time-off hours are combined and the allowed number of hours is carried over to the next year. Hours above the allowed carry-over number are deleted. The default number of carried-over hours is 0.

Important

The current time-off period is determined either by the most recent carry-over date or, if no prior carry-over date exists, by the agent's date of hire. In cases where an agent has worked for several years with no carry-over calculation, time-off balances are calculated by taking into consideration each year the agent has worked. To apply bonus time-off hours to the current year, the agent must have had time-off carry-over calculated at the most recent carry-over date. If you have already applied bonus hours and the carry-over date is not current, you can perform a carry-over calculation, at which time the bonus hours will be converted to carry-over hours. When performing this update, make sure that the number of carried-over hours allowed is large enough to accommodate all bonus hours to be carried over.

- **Hours that can be taken in advance per year**—Enter the number of time-off hours the agent can take in advance each year. These hours are offset by the hours accrued. This setting is disabled for awarded time-off rules.
- **Apply rule on hire date** (if not checked, rule becomes applicable after the period below, starting on the hire date)—Select this check box to specify that the agent accrues time off from the date of hire. If disabled, time off is accrued beginning on the date when time off can be requested as set in the **Time off can be requested after this period expires (after the hire date)** field.
- **Time off can be requested after this period expires (after the hire date)**—Enter the number of weeks or months the agent has to work after the hiring date before he or she can enter a time-off request.
- **Carry-over day**—Enter a date that signifies the end of a period when carry-over days become applicable and a new time-off accrual period starts. It can be any day and month.

Important

- The **Carry-Over Day** is applied to all agents who are assigned this time-off rule. The last carry-over date for all agents is updated to the date you select in the **Carry-Over Day** field.
- Time-off days can be requested or granted only if they are after the last carry-over date.
- Calculations of carry-over cannot be reversed.
- Carry-over calculations apply from the last carry-over date or the agent's date of hire, whichever is more recent.

Editing rules

To edit a time-off rule:

1. In the **Time-Off Rules** pane, select the rule you want to edit.
2. Make the appropriate changes to the **Properties** and **Rules for Requests** pane settings.
3. Click **Save Now** .

Important

Editing time-off rules changes the way WFM calculates accrued hours. Changes affect the time-off balances of all agents associated with the rule, but not the historical records of agents' time-off balances (calculated by the WFM carry-over process).

Deleting rules

To delete a time-off rule:

1. In the **Time-Off Rules** pane, select the rule you want to delete.
2. Click **Delete** .
3. When the **Confirmation** dialog appears, click **Yes** to proceed or **No** to cancel the action.

Copying rules to sites

To copy a time-off rule:

1. In the **Time-Off Rules** pane, select the rule you want to copy.
2. Click **Copy** .
3. In the **Copy Time-Off Rule** pane, enter a new name for the rule.
4. Remove the check mark from the **Copy to the same Site** check box if you want to copy the rule to site, other than the selected one. Otherwise, leave it checked.
5. If you removed the check mark, select the site to which you want to copy this rule.
6. Click **Save Now** .

Rules for requests

[Link to video](#)

To configure rules for time-off requests, watch the video and/or follow this procedure:

1. In the **Time-Off Rules Properties** pane, click **Rules for Requests**.
2. Configure the rule settings below.
3. Click **Save Now** .

Next Step:

- Assign agents and time-off types to this rule. See Assigning time-off rules and part 3 of this video series.

Understanding the settings

- **Paid hours in full-day time off**—Enter the number of paid hours in a full day time-off period.
- **Estimated daily paid hours**—This value is enabled only if you left the Ignore accrual settings check box in the Properties pane unchecked. It is used only if you selected Hours or Days in the For every drop-down list for Number of hours earned. WFM Server uses this value when estimating an agent's time-off balance for dates when no schedule is available. Therefore, under normal circumstances, it should match the contract Standard Daily Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours.
- **Estimated weekly paid hours**—This value is enabled only if you left the Ignore accrual settings check box in the Properties pane unchecked. It is used only if you selected Hours or Days in the For every drop-down list for Number of hours earned. WFM Server uses this value when estimating an agent's time-off balance for dates when no schedule is available. Therefore, under normal circumstances, it should match the contract Standard Weekly Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours. You can configure this text box down to a one-minute time unit.
- **Automatically approve time-off requests if:**
 - **Request is made by the following number of weeks in advance**—Select and complete to enable WFM to automatically grant time off that an Agent requests through WFM Web, provided the request meets the Week(s) and Hours specifications in Minimum requested time off.
 - **Minimum requested time off is**—Enter minimum hours and minutes for time-off requests. **(Automatic Approval is also known as *auto-granting*.)**
- **Prevent agent time-off request if:**
 - **Request is made by the following number of days in advance**—Enter the number of days that an Agent can request time off in advance.
- **Issue warnings for time-off requests if:** (Checking this box effective prevents agents from making these requests.)
 - **Request is made by the following number of days in advance**—Enter the number of days an agent can request time off in advance before a warning is issued.
 - **Requested number of continuous time-off days in this request is less than the following value**—Enter a number for the minimum continuous time-off days an agent is allowed before a warning is issued.
- **Limit the total number of requested time-off hours, if:**
 - **Maximum number of hours that can be requested are**—Specify the number of days in

advance that can be requested.

- **Applicable time period for this limitation is**—Enter a time period for this limitation. Use this rule to ensure fairness, for example in vacation usage by restricting requests until every agent has reserved at least some vacation time. Also:
 - You can modify these rules at any time. Your change does not affect existing items, but it does affect all subsequent agent or supervisor actions.
 - You are restricting time-off usage, not time-off accrual.
 - Agents cannot request more time off than is allowed during the restricted period. But a supervisor requesting more time off than is allowed will receive a warning and will be able to override the restriction.

Assigning time-off rules

Assign agents and time-off types to time-off rules to manage the agent's accrued and awarded time-off hours.

Associating agents and time-off types to rules

To associate agents and time-off types to time-off rules, watch the video and/or complete this procedure:

1. In the time-off rules **Assignments** pane, click **Associate Agents and Time-Off Types with this rule** .
2. Enter a **Start Date** and **End Date** for this rule assignment.
3. Click **Add Agent(s) to a Time-Off Rule** .
A pane containing a list of available agents opens.
4. Select one or more agents to associate with this rule and then, click **Apply** . The selected available agents are moved to a list of assigned agents.
5. In the **Time-Off Types** section, click **Add Time-Off Types to a Time-Off Rule** .
Another pane opens, enabling you to select from a list of time-off types.
6. Select one or more time-off types and click **Apply** .
The selected time-off types are moved to a list of assigned time-off types.
7. In the **Associate following agents and time-off types with rule** pane, click **Apply**  again.

Disassociating agents and time-off types

To disassociate agents and time-off types to time-off rules:

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1. In the assigned agents and time-off types lists, select the items you want to disassociate from this rule.
 2. Click **Remove Agents and Time-Off Types association from this rule** .
 3. When the confirmation dialog appears, click **Yes** to proceed or **No** to cancel the action.