Workforce Management Web for Agents Help (Classic)

Time Off Pane

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Contents

Time Off Pane

The Time Off pane includes two main sections:

1. The balance pane, which shows your time-off balance for the time off type you select in the drop-down list in the upper left corner of the Time Off window. The legend indicates what each color represents.

2. The calendar, which shows time-off requests and their status. The days for which you have submitted time-off requests are shown in different colors, depending on the request's status.

Time Off Calendar

Each date on the calendar has a check box next to it.

- To create a new time-off request, select one or more check boxes and then click **New**. For more information about how to create a new time-off request, see Requesting Time Off.

- To change an existing time-off request, select one or more check boxes next to dates that have time-off requests entered for them and then click **Edit**. For more information about how to edit an existing time-off request, see Editing Time Off.

- To recall a time-off request, select the check boxes for one or more dates that have time-off requests attached to them and then click **Recall**. For more information about the Recall feature, see Recalling a Time-Off Request.

- To delete a time-off request, select the check boxes for one or more dates that have time-off requests attached to them and then click **Delete**. See Deleting Time Off for more information about deleting a time-off request.

- To display all existing time-off data for a particular day in the calendar, hover the cursor over that day's cell. A pop-up window displays all the time-off data that exists for that day, which can include: Date, Name, Start/End Time, Status, Reason, Comments.

Comments are notes that are entered by a supervisor or manager when the time-off item is either granted or declined.

Reason is a field that explains why the WFM system put the time-off item in a particular status such as Declined or Not Scheduled.

Balance Pane

To see your balance for a specific time-off type, select the time-off type from the drop-down list at the top left part of the Time Off window.

> ### Important
>
> The information in the balance pane is for the selected time-off type only. Use the drop-down list box to select a different time-off type, to see your balance for that type. Inside the list box, the time-off types that you can request and edit are listed above the "—*Others*—" legend, and the time-off types that you cannot use are listed below it.

This table explains each category that appears on the balance pane.

Time Off Hours Section	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 awarded and configured by your supervisor or scheduling manager and are included in your total time-off balance. Supervisors determine when they are awarded, the number of hours that are awarded, and when they can be used (based on the start and expiration dates). Bonus hours are extracted from time-off balances before accrued time-off hours. If you are unsure of how and when you can use your bonus hours, ask your supervisor or manager.
	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.
	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. Note that the limit to this balance can be exceeded. If the limit is reached before the end of the Accrual Period, an agent can progressively accrue more time off if he requests it, and his 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 this section.
Legend		Each status—Declined; Granted; Preferred; Scheduled, Recalled;

		Scheduled; Not Scheduled; Recalled; and Partial—is represented by its own color. *Partial* indicates a part-day time-off request.
Bidding Periods	Name	The name of the bidding period. This box shows all of the bidding periods that are configured for the selected year, but not yet processed.
	Start	The bidding period start date and time.
	End	The bidding period end date and time.
	Processed on	The date and time on which requests for this bidding period will be processed.
	Minimum Days in Requests	The minimum number of days per request.
	Click to see attached message (link)	When clicked, this link opens a dialog containing notes or additional information about the bidding period. **Note:** The link is not present if supervisor does not add notes.

Each date in the calendar is also a link. Click the date link to update the balance pane so that it shows your time-off balance for the date you clicked instead of for the current date. For example, click the date for the day before you would like to take a vacation to see whether you will have accumulated enough time off by then to take your vacation.

Important

- The 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.

- If there are no bidding periods configured for the selected year, the **Bidding Periods** information is not displayed.

When Time Off Types No Longer Apply

A drop-down list box in the upper-left corner of your Time Off Planner displays all the Time Off Types

that are configured for your site. Some of these may not relevant for you. (Agents are assigned to Time Off Rules, which in turn are associated with Time Off Types.)

You can create, edit, delete, or recall time-off requests only for types that correspond to a Time Off Rule assigned to that agent. So, you might be able to view Time Off Types that correspond to Time Off Rules that are no longer assigned to you. You can see these "old" Time Off Types, but you cannot interact with them. They appear below the —*Others*— legend in the drop-down list.

The Time Off Types that you can use appear above the "—*Others*—" legend.

Workforce Management enables you to select a Time Off type from below the "—*Others*—" legend in the drop-down list box, but you will not be able to perform any tasks with it (such as requesting time off or viewing your time-off balance).