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Workforce Management Web for Agents Help (Classic)

Time Off

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Time Off

The **Time Off** view provides everything you need to manage your time-off requests. Clicking **Time Off** in the Menu bar (or top rail) opens a 12-month calendar for the current year and in the left-most pane, details about time-off types and time-off bidding periods.

Tip

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

Viewing your time-off in the calendar

GENESYS Selected time-off type.

New Edit Recall Delete

Holiday1

November 17, 2017
Available (in hours)

Accrued: 4:17
Bonus: 0:00
Carried over: 0:00
Credit: 30:00
Scheduled: 0:00
Granted: 0:00
Exceptions: 0:00
Preferred: 0:00

Balance: 34:17

You have (in hours) for the period from 11/17/17 to 12/31/17.

Accrual period total: 192:51

Legend

Declined	Granted
Preferred	Scheduled, recalled
Scheduled	Not scheduled
Recalled	Partial

Bidding periods (3):

Name: Time-Off Bidding Period 1
Opening Date: 2/9/17 10:00 AM
Start: 2/9/17 11:00 AM
End: 2/9/17 2:00 PM
Start Processing: 2/9/17 10:10 AM
Closing: 2/9/17 10:30 AM
Maximum Weeks:
Maximum Days:

Time-off details for the selected date and color-coded status of the request.

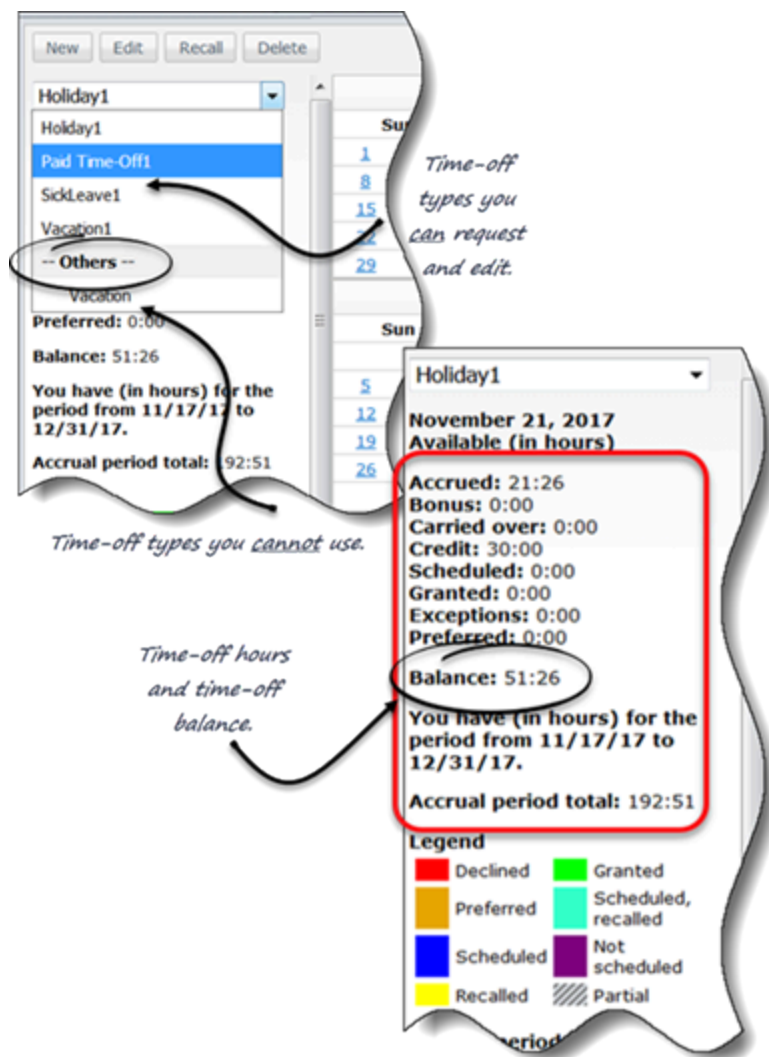
The date selected here displays below the time-off type drop-down menu.

Calendar view showing dates from Sun to Sat for July, 2017, September, 2017, and November, 2017. The date 17 in November 2017 is highlighted in yellow.

Using the **calendar**, you can view selected time-off types and their details, including the **status** of your requests, for specific dates. Use the drop-down list to select the time-off type and the **Legend** to understand the color-coded statuses.

You'll notice that each date in the calendar is underlined. Click on any date and it appears under the Time-off type drop-down list, displaying the time-off details for that date.

Viewing your time-off balance

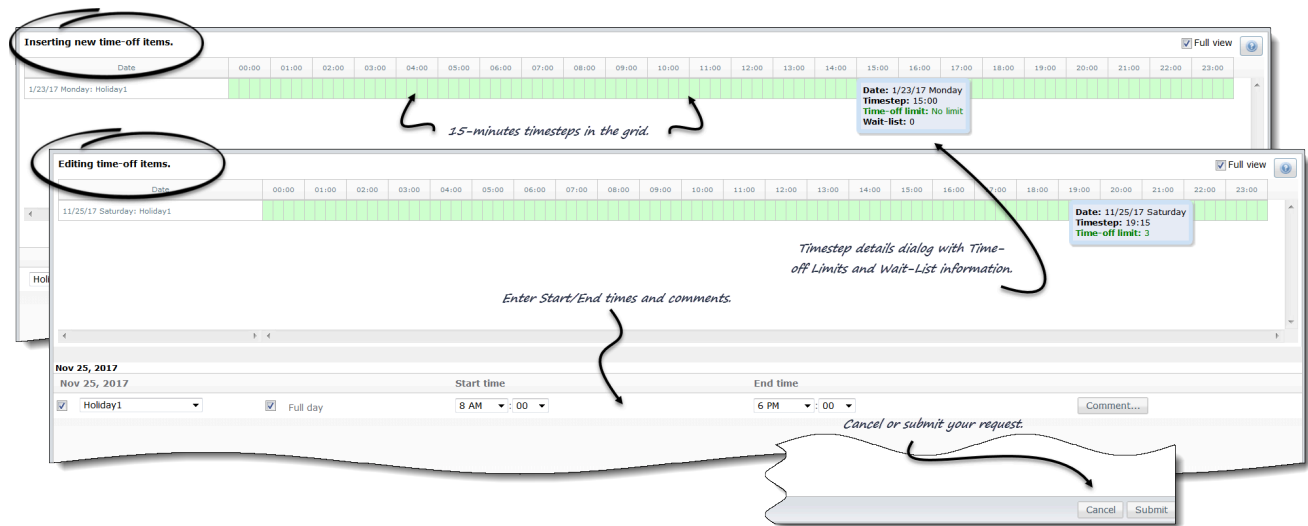


Use the calendar to view your **time-off balance** for specific time-off types and dates. Your time-off balance is the combined total of several types of time-off such as, accrued, carried over, bonus, scheduled, granted, credited, exceptions, preferred. The number of time-off hours accumulated for each is shown in the details when you select a time-off type. They are described in detail in [Time-Off Hours](#).

Also shown, is the **Accrual Period Total**, which is the total number of hours accrued for the period specified just above it in the details section. A *period* is defined as a time interval or *period of time*.

The list of time-off types is divided into two parts—The time-off types above **--Others--** and the types below it. You can request and edit only the types above it. The types below are no longer applicable to you.

Managing your time off



You manage your time-off requests, by using the four command buttons (**New**, **Edit**, **Recall**, and **Delete**) in the top-left corner of the **Time Off** pane.

Selecting one or more dates in the calendar and clicking any one of these buttons opens the appropriate view (inserting, editing, recalling, deleting time-off requests) where you will:

- Set the start and end times for your requests.
- Indicate whether your request is for a full or part day.
- Make changes to them.
- Add comments.
- Submit or cancel your requests.
- Recall or delete existing requests (not yet granted or scheduled).

The grid in the upper section of new and edited requests shows the entire day, divided into 15-minute timesteps. To find out if there are **time-off limits** or if your request is **wait-listed**, hover your cursor over any timestep to see this information in a pop-up dialog.

Recalling time-off items.

⚠ The selected items are part of a batch request, including the time-off items below. This action can be applied only to all of the listed items at once.

☒ Batch request 1 (2).
Nov 20, 2017

		Start time	End time	
Paid Time-Off1	<input type="checkbox"/> Full day	1 PM	4 PM	<input type="text" value="Comment"/>

Nov 21, 2017

		Start time	End time	
Paid Time-Off1	<input checked="" type="checkbox"/> Full day	1 PM	4 PM	<input type="text" value="Comment"/>

Deleting time-off items.

☒ Batch request 1 (1).
Nov 25, 2017

		Start time	End time	
<input checked="" type="checkbox"/> Holiday1	<input checked="" type="checkbox"/> Full day	8 AM	5 PM	<input type="text" value="Comment"/>

Click "Submit" to recall or delete the request or "Cancel" to cancel the action.

You won't see the **Time-Off Limits** grid when you are recalling or deleting your requests. You'll see only the time-off request details and, if the request is part of a batch, the batch details.

WFM processes each request as a batch. A request you submit for multiple dates is considered 1 batch containing multiple items. Therefore, when you recall any time-off item in a batch, WFM performs the action on all items submitted in that batch. You can only select or deselect items from the same batch together, not separately.

Viewing time-off bidding periods

The screenshot displays a list of bidding periods in a left-side pane. The first period, 'Time-Off Bidding Period1', is highlighted. A red box encloses its constraints: 'Maximum Weeks:', 'Maximum Days:', 'Maximum Hours:', and 'Minimum Consecutive Days: 1'. A third period, 'BiddingAug', is partially visible at the bottom. A fourth period, 'TOB_NovDec', is shown in a separate pane on the right. Hand-drawn arrows and text provide context: one points to the count '(3)' in the header; another points to the constraints of the first period; a third points to the 'Message' field of the third period; and a fourth points to the 'Entering' status of the fourth period.

Bidding periods (3):

Name: Time-Off Bidding Period1
Opening Date: 2/9/17 10:00 AM
Start: 2/9/17 11:00 AM
End: 2/9/17 2:00 PM
Start Processing: 2/9/17 10:10 AM
Closing: 2/9/17 10:30 AM
Maximum Weeks:
Maximum Days:
Maximum Hours:
Minimum Consecutive Days: 1
Message:
Status: [Processed](#)

Name: Time-Off Bidding Period1_1
Opening Date: 5/21/17 10:00 AM
Start: 5/24/17 11:00 AM
End: 6/10/17 2:00 PM
Start Processing: 5/22/17 10:10 AM
Closing: 5/23/17 10:30 AM
Maximum Weeks:
Maximum Days:
Maximum Hours:
Minimum Consecutive Days:
Message:
Status: [Processed](#)

Name: BiddingAug
Opening Date: 6/23/17 12:00 AM
Start: 9/1/17 12:00 AM
End: 9/7/17 12:00 AM
Start Processing: 8/25/17 12:00 AM
Closing: 8/31/17 12:00 AM
Maximum Weeks: 1
Maximum Days: 6
Maximum Hours: 48:00
Minimum Consecutive Days: 1

Name: TOB_NovDec
Opening Date: 11/23/17 8:00 AM
Start: 12/19/17 12:00 AM
End: 12/21/17 12:00 AM
Start Processing: 12/11/17 12:00 AM
Closing: 12/14/17 12:00 AM
Maximum Weeks:
Maximum Days:
Maximum Hours:
Minimum Consecutive Days: 1
Message: [Click to see the attached message.](#)
Status: [Entering](#)

The number of bidding periods displayed in this pane.

Bidding period constraints.

Supervisors can add messages or additional information for agents

An open bidding period with agent's status set to "Entering".

In some contact centers agents can bid for time-off (it's sometimes called "vacation bidding"). Supervisors create bidding periods with certain rules or constraints that occur or are *open* for a period of time. You and your teammates can see the bidding period details in the left-side pane in the **Time-Off** view.

There might be more than one bidding period open or being processed at the same time, as bidding

periods can overlap.

You can bid for time off between the **Opening** and **Closing Date** for the bidding period. To enter a time-off bid, you **create and submit a time-off request**. After you've done so, click the **Status** link to change your status from **Entering** to **Ready**. This lets your supervisor know your request is ready for processing.

You might see other **statuses** in the bidding details that you didn't add and cannot change. Your supervisor can set your status to **Entering**, **Ready**, or **Skipped**. WFM automatically sets other statuses at various stages of processing, such as **Waiting**, **Processed**, and **Timed Out**.

For more information about how your requests are processed within bidding periods, see [Submitting Time-Off Bids](#).

Tip

If you do not see Bidding Periods details in the left-side pane, either there are no open bidding periods or Time-Off Bidding is not enabled in your contact center. Also, time-off bidding is different from schedule bidding. To enter bids for schedules, use the **Bidding** view.