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Workforce Management Supervisor Help

Time-Off Limits

12/14/2025

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Time-Off Limits

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 can 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*. Depending on your contact center settings, these items can be additionally checked against the time-off limits. In the default configuration, they are not checked, and 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, open the **Option** menu  and 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 [The 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 on the toolbar.
See [The Set Values Dialog Box](#) for instructions on using this feature.
9. To keep your changes, click the **Save** button, which is located on the top-right corner of the window.

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.