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## Workforce Management Web for Supervisors Help

Assigning Time-Off Rules

5/7/2025

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# Assigning Time-Off Rules

Use the **Time-Off Rules Assignment** pane to assign agents and time-off types to a time-off rule.

## 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:

#### Link to video

- 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.**
- 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:

- 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.

### Associating Agents Based on Hire Dates

Use the following procedure to perform bulk assignments of time-off rules, based on the agents' hire date.

<b>() × ب</b>				Click the Sort menu						
ASSOCIATE FOLLOWING AGENTS AND TIME-OFF TYPES WITH RULE				Q Search agent						
Start Date				Search by:  First Name  Last Name						
Jun 23, 2020			AGE	NTS					$\searrow$	
End Date				" Team " First Name			Last Name	I 🔺 H	Team	
			2	Team1_1		AgentF01	AgentL01	Jan	First Nam	
		+-	. 2	_			-			
AGENTS				Team1_1		AgentF02	AgentL02	Jan	Last Name	
Team     First Name     Last Name				Team1_1		AgentF03	AgentL03	Jan	<ul> <li>Hire Date</li> </ul>	
			8	Team1_1		AgentF04	AgentL04	Jan 1, 2017		
There are no agents to display			2	<b>2</b> Team1_1		AgentF05	AgentL05	Jan 1, 2017		
				⊷ <b>× 0</b>	AgentL06	Jan 1, 2017				
Q Search agent Search by:  First Name  Last Name AGENTS							AgentL07	Jan 1, 2017 Jan 1, 2017		
							AgentL08			
							AgentL09	Jan 1, 2017		
	" Team	First Name	Last Na	me	🛚 🔺 Hire	Date I	AgentL10	Jan 1	, 2017	
	<b>2</b> Team1_1	AgentF01	AgentL01 AgentL02		Jan 1, 2	017				
<< < > >>	E Team1_1	AgentF02			Jan 1, 2	017				
	E Team1_1	AgentF03	AgentL03		Jan 1, 2017					
	E Team1_1	AgentF04	AgentL04		Jan 1, 2017					
	Ream1_1	AgentF05	AgentL05		Jan 1, 2017					
	<b>&amp;</b> Team1_1	AgentF06	AgentL06		Jan 1, 2017					
	Ream1_2	AgentF07	AgentL07		Jan 1, 2017 📲					
	<b>2</b> Team1_2	AgentF08	AgentL	08	Jan 1, 2017					
	Ream1_2	AgentF09	AgentL	09	Jan 1, 2	017				

- 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. Click **Sort** and choose **Hire Date**.
- 5. Select one or more agents to associate with this rule, based on the hire date and then, click Apply

#### The selected available agents are moved to a list of assigned agents.

6. To assign time-off types, complete steps 5-7 in the procedure above.

When selecting **Hire Date** in the **Sort** menu, you can toggle it to display in ascending or descending order, or toggle it in the column header.

To select multiple rows in lists, use the Shift+Space keys on the keyboard, or hold down the Shift key and use your mouse. Simply hold down the Shift key and either click the first and last row you want to select or click each row, one after the other.