Workforce Management Web for Supervisors Help

Assigning Time-Off Rules

5/7/2025

Contents

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.

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.
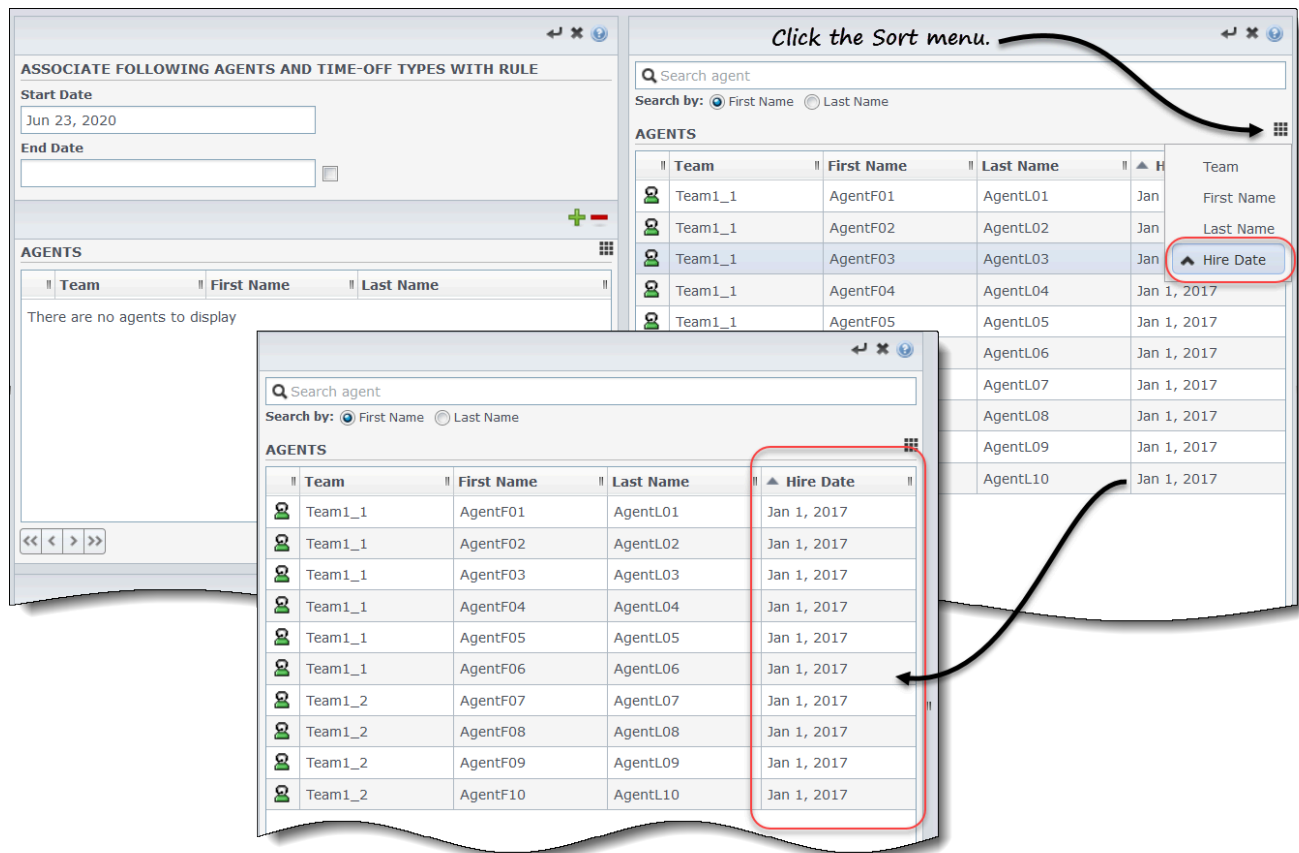
Disassociating Agents and Time-Off Types

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

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.

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** .

2eba4fb0ac863c92

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.