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Workforce Management Web for Supervisors Help

Rules For Requests

Rules For Requests

The **Rules for Requests** pane, enables you to configure rules for time-off requests.

Configuring Rules for Requests

Link to video

To configure rules for time-off requests, watch the video and/or follow this procedure:

1. In the **Time-Off Rules Properties** pane, click **Rules for Requests**.
2. Configure the rule settings [below](#).

3. Click **Save Now** .

Next Step:

- Assign agents and time-off types to this rule. See [Assigning Time-Off Rules](#) and part 3 of this video series.

Rules for Requests Settings

- **Paid hours in full-day time off**—Enter the number of paid hours in a full day time-off period. (If you enter 0, paid hours for full-day time off items are not defined.)
- **Estimated daily paid hours**—This value is enabled only if you left the Ignore accrual settings check box in the Properties pane unchecked. It is used only if you selected Hours or Days in the For every drop-down list for Number of hours earned. WFM Server uses this value when estimating an agent's time-off balance for dates when no schedule is available. Therefore, under normal circumstances, it should match the contract Standard Daily Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours.
- **Estimated weekly paid hours**—This value is enabled only if you left the Ignore accrual settings check box in the Properties pane unchecked. It is used only if you selected Hours or Days in the For every drop-down list for Number of hours earned. WFM Server uses this value when estimating an agent's time-off balance for dates when no schedule is available. Therefore, under normal circumstances, it should match the contract Standard Weekly Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours. You can configure this text box down to a one-minute time unit.
- **Automatically approve time-off requests if:**
 - **Request is made by the following number of weeks in advance**—Select and complete to enable WFM to automatically grant time off that an Agent requests through WFM Web, provided the request meets the Week(s) and Hours specifications in Minimum requested time off.

- **Minimum requested time off is**—Enter minimum hours and minutes for time-off requests. (Automatic Approval is also known as *auto-granting*.)
- **Prevent agent time-off request if:**
 - **Request is made by the following number of days in advance**—Enter the number of days that an Agent can request time off in advance.
- **Issue warnings for time-off requests if:** (Checking this box effective prevents agents from making these requests.)
 - **Request is made by the following number of days in advance**—Enter the number of days an agent can request time off in advance before a warning is issued.
 - **Requested number of continuous time-off days in this request is less than the following value**—Enter a number for the minimum continuous time-off days an agent is allowed before a warning is issued.
- **Limit the total number of requested time-off hours, if:**
 - **Maximum number of hours that can be requested are**—Specify the number of days in advance that can be requested.
 - **Applicable time period for this limitation is**—Enter a time period for this limitation. Use this rule to ensure fairness, for example in vacation usage by restricting requests until every agent has reserved at least some vacation time. Also:
 - You can modify these rules at any time. Your change does not affect existing items, but it does affect all subsequent agent or supervisor actions.
 - You are restricting time-off usage, not time-off accrual.
 - Agents cannot request more time off than is allowed during the restricted period. But a supervisor requesting more time off than is allowed will receive a warning and will be able to override the restriction.