Workforce Management Web for Supervisors Help

Time-Off Types

5/5/2025

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Time-Off Types

WFM enables you to configure multiple types of time off. Examples of time-off types include vacation, sick leave, paid time off, holiday, and maternity leave.

By default, WFM creates the **Vacation** time-off type. This time-off type cannot be deleted and does not belong exclusively to any site.

You can configure a time-off rule for a one or multiple time-off types. When you configure multiple time-off types for the same rule, the time-off balance is calculated and accrued for all time-off types associated with that rule.

Use the procedures in this topic to create, copy, edit, and delete time-off types, and associate/disassociate time-off types with sites.

You assign time-off type/time-off rule combinations to agents by using the **Configuration** > **Agents** > Time Off pane.

Creating Time-Off Types

Link to video

To create a time-off type, watch the video and/or follow the steps in this procedure:

1. In the **Policies** module, select **Time-Off Types**.
2. In the **Objects** pane, select the site(s) or business unit with which the new object will be associated.

   > **Tip**
   > You can select multiple sites (just keep clicking on them) but only one business unit.

3. Select **New** ( ) from the toolbar.
4. Configure the new object on the Properties tab and the Associated Sites tab.
5. Click **Save** when you are finished.

Editing Time-Off Types

To edit a time-off type:

1. In the **Time-Off Type** pane, select a time-off type.
2. Select the Properties tab and/or the Associated Sites tab and make the changes.
3. Click **Save**.

> **Tip**
> You cannot edit a time-off type that is used in the **Calendar** or **Meeting Planner**.

Deleting Time-Off Types

To delete a time-off type:

1. In the **Time-Off Type** pane, select a time-off type.
2. Select **Delete** from the toolbar.

> **Tip**
> You cannot delete a time-off type that is used in the **Calendar** or **Meeting Planner**.

Copying Time-Off Types

To copy a time-off type:

1. Select an existing time-off type from the list.
2. Click **Copy** from the toolbar.
3. Rename and associate the time-off type with a Business Unit.
4. Click **Save** when you are finished.

Properties Tab

- **Name**—This name should be descriptive and must be unique within the site.

- **Short Name**—The short name of the time-off type can be up to three characters.

- **Time-Off Type is Paid**—Select this check box if the time-off type is paid.

- **Counts Toward Time-Off Limits**—Select this check box if WFM should apply time-off hours of this type to the time-off limits that you set in the WFM Web for Supervisors **Calendar** module. If you clear this check box, no time-off limits are applied to this time-off type.

- **Trade Rule**—This controls whether agents can trade schedule periods that include time off of this type. For example, a paid-time-off day normally stays with the agent, whereas training may stay with the schedule (any agent who is working that shift would attend that training). The selections are:

  - **Delete** (deletes the trade proposal)

  - **Do not trade** (denies the trade proposal)

  - **Keep with agent**

  - **Keep with schedule** (default).

Associating and Disassociating Sites

1. Select a site's check box to associate it with the current time-off type.

   - In the **Schedule State Group** drop-down list, select the group that will be associated with this time-off type.

2. Clear a site's check box to disassociate with the current time-off type.

3. Click **Save**.

When associating sites, on the **Associated Sites** tab you can associate a time-off type with a Schedule State Group. The site's **Schedule State Groups** drop-down list is enabled when you check a site. It contains all Schedule State Groups under the selected site.

If a Schedule State Group with an associated **Fixed State Exception** exists for the selected site, this Schedule State Group is selected by default in the **Schedule State Group** drop-down list when you check this site.