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# Workforce Management Web for Supervisors Help

Configuring Time-Off Rules

12/15/2025

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# Configuring Time-Off Rules

The Time-Off Rules panes, which include **Properties**, **Rules for Requests**, and **Assignments**, enable you to **create**, **edit**, **delete**, and **copy** time-off rules, configure rules for requests, and assign time-off rules.

## Creating Time-Off Rules

### [Link to video](#)

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

1. In the **Time-Off Rules** pane, click **New**  .  
**The Properties pane opens.**
2. Configure the **Time-Off Rules Properties**, as required.
3. Click **Save Now**  .

### **Next Steps:**

- Configure rules for time-off requests. See **Rules for Requests** and part 2 of this video series.
- Assign agents and time-off types to this rule. See **Assigning Time-Off Rules** and part 3 of this video series.

## Time-Off Rules Properties

You can configure the following properties for Time-Off Rules:

- **Name**—Accept the default name or enter a different name. The name must be unique within the site.
- **Type**—Select one of two types:
  - **Accrued**—A certain number of time-off hours accumulate for each period worked.
  - **Awarded**—A set amount of time off given for the year.

**For example, paid time off is usually accrued, whereas holidays are awarded.**

### Tip

The Type field is enable only when the time-off rule is created. Thereafter, it is read-only.

- **Ignore accrual settings (resulting in unlimited balances, if this rule is used)**—Select this check box to disable:
  - All other controls in the **Properties** pane.
  - The Estimated daily paid hours and Estimated weekly paid hours in the **Rules for Requests** pane. Default setting: cleared (disabled).**Use the default setting for special circumstances, such as sick days, that are subject to time-off limits but do not count against an agent's time-off balance.**

### Tip

The **Limit the total number of requested time-off hours, if** setting is related to time-off balances. It works for both awarded and accrued rules when WFM calculates the balance. When the **Ignore accrual settings (resulting in unlimited balances, if this rule is used)** setting is checked, WFM does not calculate the balance. Therefore, there's no limitation for the affected period. When both of these settings are checked, you might see the error message: *Agent has accrual rule but ignore balance check is selected*. To avoid this error, uncheck the **Ignore accrual settings (resulting in unlimited balances, if this rule is used)** setting and set a higher number of hours for the rule, instead of an unlimited balance.

- **Number of hours earned**—Enter the number of hours that can be accrued every period in the hh:mm format.
- **For every**—Enter a number for how often the specified hours are accrued and then select the unit for the number (hours, days, weeks, months, or years) from the drop-down list.

### Tip

Awarded time off must be entered as x hours per 1 Year. You cannot select any other period. Synchronization can affect an agent's time-off accrual. If agents with time-off rules for one or more types of time off are transferred to a different site during synchronization, the time-off rules remain associated with the agents, but they are no

longer active. You must manually assign time-off rules that are configured for the new site to the agents.

- **Limit the time-off balance to the following value**—Select this check box to set a limit to the total number of time-off hours an agent can accumulate.
- **Hours that can be carried over to the next year**—Enter the number of time-off hours that can be carried over into the next yearly period. At carry-over, bonus and accrued time-off hours are combined and the allowed number of hours is carried over to the next year. Hours above the allowed carry-over number are deleted. The default number of carried-over hours is 0.

### Tip

The current time-off period is determined either by the most recent carry-over date or, if no prior carry-over date exists, by the agent's date of hire. In cases where an agent has worked for several years with no carry-over calculation, time-off balances are calculated by taking into consideration each year the agent has worked. To apply bonus time-off hours to the current year, the agent must have had time-off carry-over calculated at the most recent carry-over date. If you have already applied bonus hours and the carry-over date is not current, you can perform a carry-over calculation, at which time the bonus hours will be converted to carry-over hours. When performing this update, make sure that the number of carried-over hours allowed is large enough to accommodate all bonus hours to be carried over.

- **Hours that can be taken in advance per year**—Enter the number of time-off hours the agent can take in advance each year. These hours are offset by the hours accrued. This setting is disabled for awarded time-off rules.
- **Apply rule on hire date** (if not checked, rule becomes applicable after the period below, starting on the hire date)—Select this check box to specify that the agent accrues time off from the date of hire. If disabled, time off is accrued beginning on the date when time off can be requested as set in the **Time off can be requested after this period expires (after the hire date)** field.
- **Time off can be requested after this period expires (after the hire date)**—Enter the number of weeks or months the agent has to work after the hiring date before he or she can enter a time-off request.
- **Carry-over day**—Enter a date that signifies the end of a period when carry-over days become applicable and a new time-off accrual period starts. It can be any day and month.


### Tip

- The **Carry-Over Day** is applied to all agents who are assigned this time-off rule. The last carry-over date for all agents is updated to the date you select in the **Carry-Over Day** field.
- Time-off days can be requested or granted only if they are after the last carry-over date.

- Calculations of carry-over cannot be reversed.
- Carry-over calculations apply from the last carry-over date or the agent's date of hire, whichever is more recent.

## Editing Time-Off Rules

To edit a time-off rule:


1. In the **Time-Off Rules** pane, select the rule you want to edit.
2. Make the appropriate changes to the **Properties** and **Rules for Requests** pane settings.
3. Click Save Now .

### Tip

Editing time-off rules changes the way accrued hours are calculated by WFM. Changes affect time-off balances of all agents associated with the rule, but not the historical records of agents' time-off balance calculated by the carry-over process.



## Deleting Time-Off Rules

To delete a time-off rule:

1. In the **Time-Off Rules** pane, select the rule you want to delete.
2. Click **Delete** .
3. When the **Confirmation** dialog appears, click **Yes** to proceed or **No** to cancel the action.

## Copying Time-Off Rules to Sites

To copy a time-off rule:

1. In the **Time-Off Rules** pane, select the rule you want to copy.
2. Click **Copy**  .
3. In the **Copy Time-Off Rule** pane, enter a new name for the rule.
4. Remove the check mark from the **Copy to the same Site** check box if you want to copy the rule to site, other than the selected one. Otherwise, leave it checked.
5. If you removed the check mark, select the site to which you want to copy this rule.
6. Click **Save Now**  .