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Workforce Management Web for Supervisors Help

Insert Time Off Dialogs

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Insert Time Off Dialogs

WFM uses different dialog boxes and menu items for part-day and full-day time-off schedule items:

- Use the **Insert Time Off** dialog to **insert part-day time off** into an agent's schedule.
- Use the **Insert Full-Day Time Off** dialog to **insert full-day time off** into an agent's schedule.

For example, an agent might be called to jury duty or need to be out sick after the schedule is created.

Inserting Part-Day Time Off

To insert a part-day time-off item into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** view, **right-click** an agent's dark-blue shift bar (you can change the color with the **Colors Tool**).
 2. Click at or near the timestep where you want the time off to begin.
 3. From the shortcut menu that appears, select **Insert > Time Off**.
The **Insert Time Off** dialog box opens and the agent's name appears in the title bar.
 4. In the list of time-off types, click the row for the time-off type that you want to insert.
- Select the **Show all** check box to display all time-off types. Clear the check box to display only the time-off types that are applicable to the selected agent. See the "Time-Off Primer" appendix in the *Workforce Management Administrator's Guide*.

Important

The list shows time-off types that were configured in the **Policies** module of WFM Web for Supervisors. If necessary, a vertical scroll bar appears to the right.

If you select a time-off type that is not associated with a selected agent, WFM assigns the time-off item but does not enforce the time-off balance rules. However, if the time-off type counts toward time-off limits, WFM takes this time-off item into account when calculating limits.

The first two columns show each time-off type's full and short name.

Check marks in the remaining columns indicate whether the time-off item is paid and whether it counts toward time-off limits. You cannot select or clear check boxes to change these attributes here.

The **Site** column lists all sites to which the time-off type is assigned.

- Optional: Adjust the **Start Time** and **End Time** for this time off, if the default values are not correct.
 - a. Click inside the **Start Time** and **End Time** fields, to modify the default values for hours, minutes, and AM/PM.
 - b. Select **Next Day** to the right of the **Start Time** text box if the time-off period starts on the day after the

agent's shifts begin.

- c. Select **Next Day** to the right of the **End Time** text box if the time-off period ends on the day after it begins.
- Click **OK** to insert the selected time-off item and close the dialog box. The view reappears and the new time-off item appears as a dark-green bar (you can change the color with the **Colors Tool**).

Important

If the **Start** and **End time** would place the time off outside the agent's shift hours, a warning message appears. If an agent's activities are all scheduled in activity sets, and you assign a long time off, the time off may be the only schedule state group available during the agent's paid hours.

Inserting a Full-Day Time Off

To insert a full-day time-off item into an agent's schedule:

1. In the **Intra-Day** or **Agent-Extended** grid, **right-click** an agent's row.
2. From the shortcut menu that appears, select **Insert > Full-Day Time Off**. The **Insert Full-Day Time Off** dialog box opens. The agent's name appears in the title bar.
3. In the list of time-off types, click the row for the time-off type that you want to insert.

Important

The list shows the time-off types that were configured in the Policies module of WFM Web. If necessary, a vertical scroll bar appears to the right.

If you select a time-off type that is not associated with a selected agent, WFM assigns the time off but does not enforce the time-off balance rules. However, if the time-off type counts toward time-off limits, WFM takes this time-off item into account when calculating limits.

The first two columns show each time-off type's full and short name.

Check marks in the remaining columns indicate whether the time-off item is paid and whether it counts toward time-off limits. You cannot select or clear check boxes to change these attributes here.

The **Site** column lists all sites to which the time-off type is assigned.

4. Optional: Adjust the **Start time** and **End time** for this time-off item, if the default values are not correct.
 - a. Select the check box **Specify Start/End** to enable the **Start Time** and **End Time** fields, then click inside each field to modify the default values for hours, minutes, and AM/PM.
 - b. Select **Next Day** to the right of the **End Time** text box if the time-off period ends on the day after it begins.

3. Optional: Specify a nonstandard length for your full-day time-off item.

- Select the **Specify Paid Hours** check box to enable the **Paid Hours** field, then click inside and enter or select a value to specify the exact number of hours in a full day for this particular time-off item.

Important

The **Specify Paid Hours** check box is enabled only if you selected a paid time-off type in the **Choose Time Off** list.

- Click **OK** to insert the selected time-off item and close the dialog box. The view reappears. The new full-day time-off item appears as a dark-green bar (you can change the color with the **Colors Tool**).