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Genesys Engage cloud Workforce Management 8.5.1 Guide

Assigning Time-Off Rules and Types

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Assigning Time-Off Rules and Types

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to [Workforce Management in Genesys Engage cloud](#).

Use the **Time-Off Rule Assignment Properties** pane to assign time-off rules and time-off types to agents, using the controls and procedures described in this topic.

Time-Off Rule Assignment Properties controls

 Apply	Click to associate the configured time-off rule and time-off types with the agent.
 Close	Click to close the pane.
 Help	Click to view a Help topic about the Agent Time-Off Rules Properties pane.
Time-Off Rules <i>drop-down list</i>	Click to select a time-off rule.
Start Date	Click to open a calendar, from which to choose a start date for the selected time-off rule. The default date is the current day.
End Date	Click to open a calendar, from which to choose a end date for the selected time-off rule.
Current Day <i>check box</i>	Click to automatically populate this field with the current date.

Carry-Over Details controls

The carry-over details controls are:

- **Carried Hours**—The number of hours that have been carried over for this agent.
- **Accrued Hours**—The number of hours that have accrued for this agent.
- **End Date Balance**—The number of hours are left at the **end date** for this rule.
- **Awarder Bonus Hours**—The number of awarder bonus hours accrued for this agent.
- **Used Bonus Hours**—The number of bonus hours that this agent has used.

- **Expired Bonus Hours**—The number of bonus hours that have expired.
- **Schedules Hours**—The total number of scheduled hours for this agent.
- **Granted Hours**—The total number of hours that have been granted for this agent.
- **Preferred Hours**—The total number of preferred hours for this agent.
- **Declined Hours**—The total number of hours that have been declined for this agent.

Time-Off Types controls

 Add Time-Off Types to a Time-Off Rule	Click to add time-off types to a time-off rule.
 Remove Time-Off Types from a Time-Off Rule	Click to delete time-off types from a time-off rule.
 Apply	Click to apply the selected time-off types to the time-off rule assignment.
 Close	Click to close the pane.
 Search	Enter search criteria to find time-off types quickly.

Associating Time-Off Rules and Time-Off Types with Agents

To associate a time-off rule and time-off types with the selected agent:

1. In the **Agents Properties** pane, click **Time Off**.
2. Click **Associate Time-Off Rule and Time-Off Types with Agent**  .
The **Time-Off Rule Assignment Properties** pane opens.
3. Select a **Time-Off Rule** from the drop-down list .
4. Enter a **Start Date** and **End Date**, or click within either field to open a calendar, from which you can select a date.

Tip

- The **Start Date** is pre-populated with the current date, but you can change it, if necessary.
- If you check the box at end of the **End Date** field, WFM Web enters the current date automatically.

- Click **Add Time-Off Types to a Time-Off Rule**  .
The **Time-Off Types** pane opens.

- Select one or more time-off type from the list and then, click **Apply**  .

Tip

To find a specific types, enter criteria in the **Search** field. For example, enter the name of the each time-off type you want to find.

- After the selected time-off types appears in the **Properties** pane, in the **Transfer Balance** column you can:
 - Leave the check box enabled (checked by default) to carry over the balance from the previous rule.
 - Clear the check box to accrue a new balance for this rule.
- Click **Apply**  .
- In the **Time Off** pane, click **Save Now**  .

Editing Time-Off Rules and Time-Off Types Associated with Agents

To edit an existing time-off rule and time-off types associated with an agent:

- In the **Time Off** pane, select the rule you want to edit.
- The **Time-Off Rule Assignment Properties** pane opens.
- Make the necessary changes, following steps 3-9 in [Associating Time-Off Rules and Time-Off Types with Agents](#).

Deleting Time Off

To delete a time-off rule and time-off types currently associated with an agent:

- In the **Time Off** pane, select the rule you want to delete.
- Click **Remove Time-Off Rule and Time-Off Types association from Agent**  .
- When the **Confirmation** dialog opens, click **Yes** to proceed or **No** to cancel the action.

4. In the **Time Off** pane, click **Save Now**  .