Genesys Engage cloud Administrator's Guide

Time Off Primer

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Time Off Primer

> **Important**
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Genesys Engage cloud for Administrators.

Use the information in this topic to learn how WFM processes time off and how to configure it to suit the needs of your workforce and contact center.

This topic contains the following sections:

- Time-Off Types and Time-Off Rules
- Time-Off Limits
- Time-Off Request and Approval Process
- Agent Time-Off Planner

Time-Off Types and Time-Off Rules

You must understand the basics of the time off features in WFM to use them correctly and efficiently. Before you can use time off, you must configure Time-Off types and Time-Off rules.

Time-Off Types

Probably the simpler of the two objects, because each time off type is simply a container. You add time off to, or remove time off from, each container. You can create and arbitrarily name an unlimited number of Time-Off types.

You create Time-Off types for each individual site. You can use time off to track an agent request or maintain a balance of requests on a regular basis. Time off types include vacation, personal time off, flexible time off, paid sick days, floating holidays, and more.

Time-Off Rules

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. This configuration enables multiple Time-Off types to share the same Time-Off balance.

Time-off rules define:

- The rate at which time off is accumulated for an agent, and how and when an agent can request time off.

- Whether or not a Time-Off request will be manually approved, or auto-approved by the WFM system.

You assign Time-Off type/Time-Off rule combinations to agents by using the **Configuration > Agents > Time Off** or **Policies > Time-Off Rules > Assignments** pane in WFM Web for Supervisors.

Important

Time-Off types are configured on a per site basis. Therefore, if an agent has outstanding Time-Off requests and is moved to a different site, the requests are hidden, because WFM tracks them only at the initial site. The default Time-Off type Vacation is the only exception. Vacation is considered valid for all sites in the system, and Time-Off requests for vacation are retained in the system even after the agent moves from site-to-site. In addition, WFM recalculates the agent's Time-Off balance(s) when the agent moves from one site to another, based on the change in Time-Off rules. Moving an agent to a different site does not affect his/her Time-Off status.
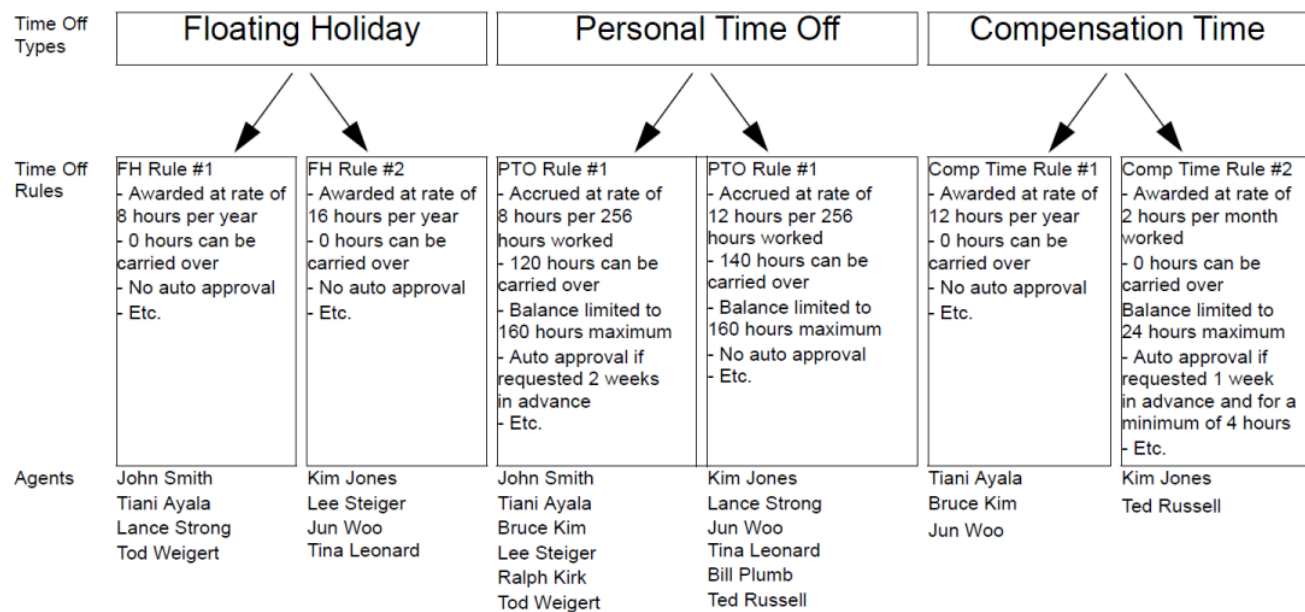
Time Off Types	Floating Holiday		Personal Time Off		Compensation Time	
Time Off Rules	FH Rule #1 - Awarded at rate of 8 hours per year - 0 hours can be carried over - No auto approval - Etc.	FH Rule #2 - Awarded at rate of 16 hours per year - 0 hours can be carried over - No auto approval - Etc.	PTO Rule #1 - Accrued at rate of 8 hours per 256 hours worked - 120 hours can be carried over - Balance limited to 160 hours maximum - Auto approval if requested 2 weeks in advance - Etc.	PTO Rule #1 - Accrued at rate of 12 hours per 256 hours worked - 140 hours can be carried over - Balance limited to 160 hours maximum - No auto approval - Etc.	Comp Time Rule #1 - Awarded at rate of 12 hours per year - 0 hours can be carried over - No auto approval - Etc.	Comp Time Rule #2 - Awarded at rate of 2 hours per month worked - 0 hours can be carried over Balance limited to 24 hours maximum - Auto approval if requested 1 week in advance and for a minimum of 4 hours - Etc.
Agents	John Smith Tiani Ayala Lance Strong Tod Weigert	Kim Jones Lee Steiger Jun Woo Tina Leonard	John Smith Tiani Ayala Bruce Kim Lee Steiger Ralph Kirk Tod Weigert	Kim Jones Lance Strong Jun Woo Tina Leonard Bill Plumb Ted Russell	Tiani Ayala Bruce Kim Jun Woo	Kim Jones Ted Russell

Figure: Relationship Between Time-Off Types, Time-Off Rules, and the Agents Assigned to Them

Notes About the Figure Above

- Agents are assigned to Time-Off rules, not directly to Time-Off types.

- The association of Time-Off rules to time off types is many-to-one, because for a single Time-Off type (for example, personal time off), different agents might be given this type of time off at different rates—perhaps based on seniority. For example, you might want requests from a certain type of agent

for paid sick days to be auto-granted by the system, but for another type of agent you might want the same requests to be manually reviewed.

- When you create a Time-Off rule, you define whether it is a rule of the type award (a fixed number of hours) or accrual (a number of hours that accumulates during the year). In the figure below, all Floating Holiday time offs are awarded and all Personal Time Offs are accrued. Compensation Time can be either awarded or accrued, depending on an Agent's assigned Time-Off rule.
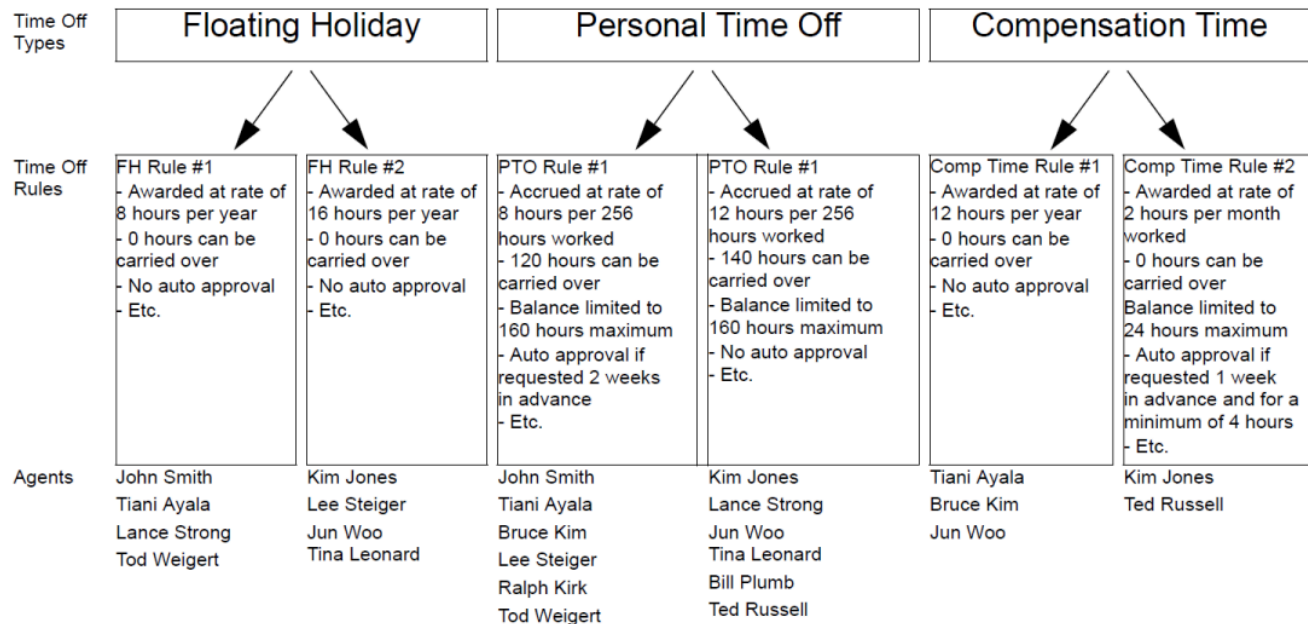
Figure: Awarded versus Accrued Time Off

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Notes About the Figure Above

- An agent can be assigned to mulitiple Time-Off rules.
  Example 1: Jun Woo has three Time-Off rules assigned to him. One rule defines how he will be awarded a Floating Holiday each year and when he can use that time off. The second rule defines the rate at which he will accrue Personal Time Off, how much balance he can have, and when he can use it. The third rule defines how he will be awarded Compensation Time each year.

- Not all agents need to be assigned to a rule for each Time-Off type.
  Example 2: John Smith has a Floating Holiday award rule and a Personal Time-Off accrual rule. However, he has no Time-Off rule defining how he can accrue or be awarded Compensation Time. Therefore, he will have no balance of this time off type and will not be able to request it.

Exception Used as Time Off

When you configure an exception type in WFM Web, you can use the option **Exception is used as Time Off** to designate the exception as time off. This is a legacy feature from earlier versions of WFM, which supported only one type of time off. WFM now supports an unlimited number of Time-Off types, which means Agents and Supervisors can request both full-day and partial-day time off. Therefore, Genesys recommends that you *do not* use exceptions to represent time off.

When Time-Off Types No Longer Apply

A combo box in the upper-left corner of an agent's **Time-Off Planner** displays all the Time-Off types that are configured for that agent's site. Some of these might not relevant for the agent. (Agents are assigned to Time-Off rules, which in turn are associated with Time-Off types.)

An agent can create, edit, delete, or recall time off requests only for those types correspond to a **Time-Off Rule** that is assigned to that agent. Therefore, an agent might be able to view **Time-Off Types** corresponding to **Time-Off Rules** are no longer assigned to him or her. The agent can see these "old" Time-Off types, but he or she cannot interact with them. They appear below the **Others** legend in the combo box.
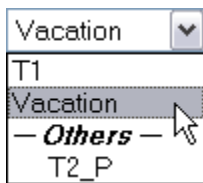

Figure: Time-Off Types Combo Box

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Time-Off Types that the agent can use appear above the **Others** legend.

WFM enables an Agent to select a **Time-Off Type** from below the **Others** legend in the combo box; however, the agent cannot perform any functions with it (such as requesting time off or viewing his or her time off balance).

Time-Off Limits

Before giving your Agents the ability to request time off, you should configure **Time-Off Limits**. To do so, use the **Calendar** module in WFM Web Supervisor.

If you have the correct permissions, you can configure the maximum number of Agents who can take time off for each 15-minute interval of each calendar day.

For example, you could configure that from midnight to 8 a.m. on March 3, 2007, 5 Agents can be allowed to take time off, whereas from 8 a.m. to 4 p.m., only 3 Agents can be take time off. You can set Time-Off limits either for an absolute number of Agents, or for a maximum percentage of Agents.

Additionally, you can set Time-Off limits at three levels: Site, Team, and Activity.

Important

You cannot set different Time-Off limits for different Time-Off types. A single set of Time-Off limits governs the total amount of time off of all types that can be granted for a specified time of day, for a specified date.

Time-Off Request and Approval Process

There are two different processes for scheduling time off for agents. The process that is used depends on whether the user is planning for a future schedule period (see Planning for Time Off in the Future) or working within a schedule period that is already published to the Master Schedule (see Planning for Time Off for the Current Schedule Period).

Planning for Time Off in the Future

For future time periods (schedule days that are not yet published to the Master Schedule), the process works as shown in the below.
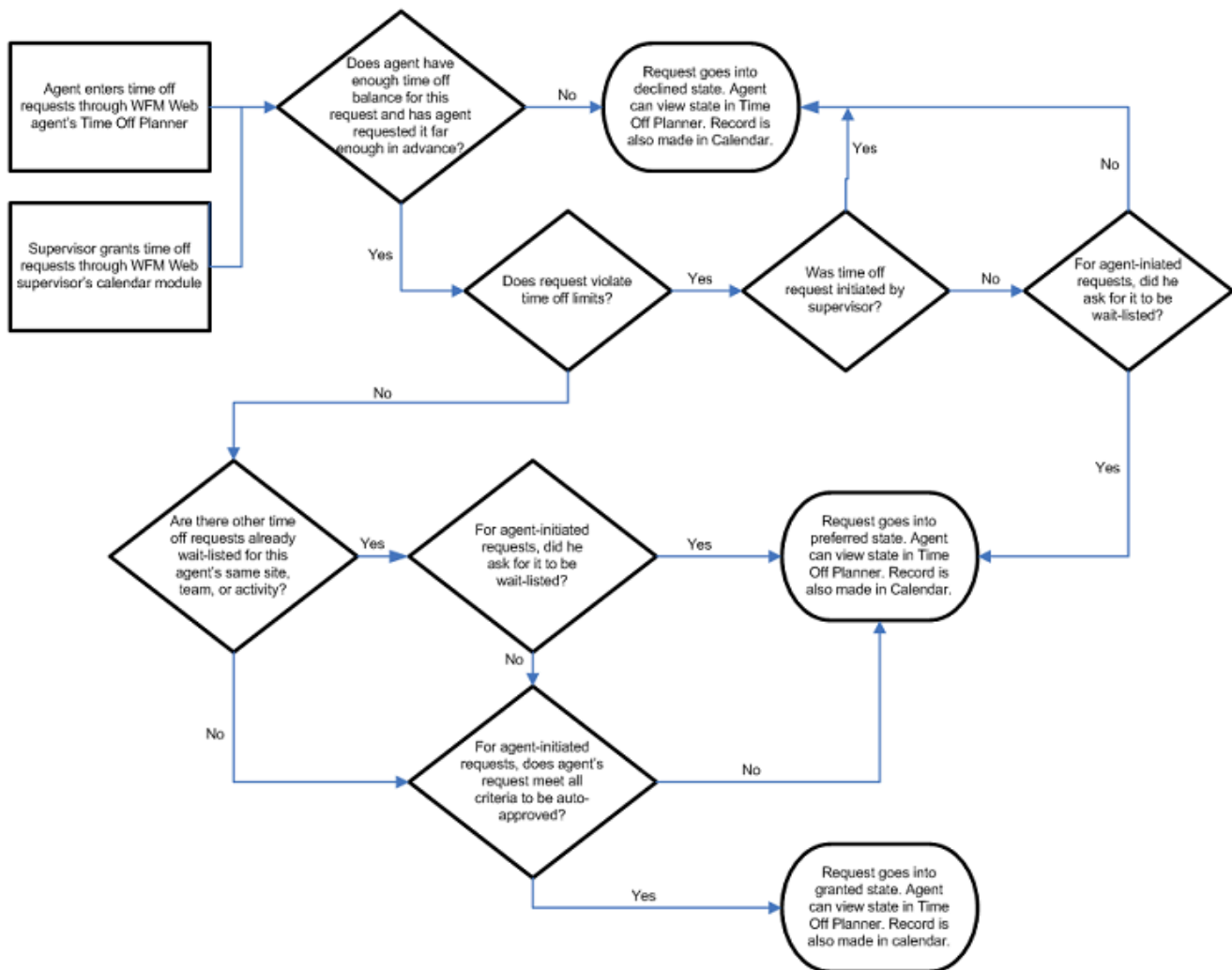

Figure: Future Time Periods Process

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The Time-Off Planner (in the WFM Web Agent application) and the **Calendar** (in the 'WFM Web Supervisor application) are really two different ways to input the same information. The **Time-Off**

Planner is the Agent's method of entering Calendar items. It allows the Agent to enter time off, but that is all.

The Supervisor's **Calendar** module has much more power: the Supervisor can enter all types of **Calendar** items, including shifts, working hours, exceptions, days off, and time off.

Both of these schedule-building input tools have the same result: the Time-Off items are recorded in the **WFM Calendar**.

Granted Time Off versus Preferred Time Off

WFM considers only Time-Off items with the status granted when building a schedule scenario. It does not include Time-Off items with the status **preferred**.

> ### Important
>
> WFM enables a Supervisor to consider Agent preferences when building schedules. These preferences include: day off, availability, and shift preferences; but not Time-Off preferences.

Time Off Items in the Calendar Hierarchy

When you enter multiple types of Calendar items for the same Agent on the same day, WFM uses its internal hierarchy to resolve their status.

- **Example 1: Full-Day Time Off versus Rotating Schedule Day In**—An Agent is assigned a Rotating Pattern for the week starting September 17, 2006, and for the date of September 19 his Rotating Pattern assignment states he should be on a *Day In*. But a supervisor grants a full-day time off for September 19. Now, the agent has two conflicting Calendar items for the same day: a working day according to the Rotating Pattern assignment, and a full-day time off according to the Calendar. The Calendar hierarchy specifies that the Full-Day Time-Off item should be granted and this should cause the Rotating Pattern assignment for that day should be declined. The statuses are reflected in the Calendar and the supervisor can read the reasons there. Some items in the Calendar do have a higher priority that Full-Day Time-Off items.

- **Example 2: Full-Day Exception versus Full-Day Time Off**—A full-day exception is granted for an agent in the Calendar for the same day as a full-day time off. The Calendar hierarchy specifies that the full-day exception should take priority and the Full-Day Time-Off item should be declined. The hierarchy of the WFM Calendar is described in the *Workforce Management Web for Supervisors Help* in the topic `Calendar Items Overview`.

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Using the Calendar to Understand the Status of Time-Off Items

You can view the *Actual Status* of any item in the Calendar; a status of **Granted**, **Preferred**, or **Declined** confirms that no schedule has been published for this Agent for this date. In a built and published schedule, the *Actual Status* of an item will be either **Scheduled** or **Not Scheduled**. If a Calendar item was not scheduled, you can view a Reason field which will describe why it was not scheduled (in the **Reason** column).

Planning for Time Off for the Current Schedule Period

To enter agent Time-Off items for days that are already published to the Master Schedule, use either of these methods:

1. Enter time off directly into the **Master Schedule**.

> ### Important
> The agent can view this Time-Off entry in his schedule by logging in to the **WFM Web for Agents Application**. He/she will also see a change to his time-off balance in the **WFM Web for Agents' Time Off Planner** and he/she can see that time off for this day is scheduled, when he views his **Time-Off Planner**. However, no entry for this time off will be made in the **WFM Calendar**, because the **Calendar** is a planning tool, and is meant for entering items such as exceptions, time off, days off, etc., that are to be considered when building a schedule scenario.

2. Enter the granted Time-Off request into the **WFM Calendar**.

3. Click **Update Schedule**.

WFM has now automatically updated the **Master Schedule** with the agent's **Granted Time Off**.

Using **Update Schedule** from within the **Calendar** updates the **Master Schedule** from the **Calendar** for the agent's Time-Off request, which streamlines the review and approval process and eliminates the need to manually rebuild the schedule.

> ### Important
> From within the **Calendar** module, users can update the **Master Schedule** with a granted **Time-Off** items for any agent on any date for which the agent has a schedule published, and the **Time-Off** request is compatible with the agent's existing schedule. For more details, see the *WFM Web for Supervisors Help* topics **Calendar Items Overview** and **Update Schedule Options**.

Agent Time-Off Planner

Agents request time off and see the status of these requests through **WFM Web for Agents Time-Off Planner**. If you do not want your agents to have access to the **Time-Off Planner**, you can disable this through the **Time-Off Planner Enabled** setting. In Configuration Manager, for your **WFM Web Application** object, open **Options > AgentTimeOff**, and set the variable **AllowTimeOffPlanner** to `false`.

Time-Off Balance in Agent's Time-Off Planner

The Time-Off Planner displays the balances for an agent's time off, in this way: the agent selects a Time-Off type and clicks on a date in the yearly planning calendar to view balances for that type, up

to that date.

The agent can also view the types of Time-Off hours prior to the selected date: already granted, preferred, declined and scheduled, bonus, advance, and carried-over.

When an agent's Time-Off rule is changed, his time off is recalculated, based on the new rules.

See some examples.. [+]

- If a Time-Off rule is assigned to an agent and you change any of the rule's properties.
- If a Time-Off rule is assigned to an agent and you use the `Time Off` tab under `Configuration > Organization > Agent properties` to change the rule.
- If a Time-Off rule is assigned to an agent and you use the `Assignments` tab under `Policies > Time-Off Rules > Properties` to remove the assignment.

In each case, the user is asked to approve the calculation before it is performed.

> ## Warning
> Moving to a different site can affect an agent's Time-Off balance. An agent who moves to a different site might appear to lose a portion of her existing Time-Off balance, because WFM tracks that time off only at the old site. To preserve the Time-Off hours that the agent earned at the previous site, her supervisor must enter these hours as a bonus to the new `Agent Rule` under the new site. For details, see the *WFM Web for Supervisors Help* topic `Agent Time Off > Bonus Time Off Hours`.

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Recalling Time Off Requests

An agent can recall a Time-Off request that is in preferred or granted status, as long as the Time-Off item has not been scheduled. Use the **WFM Web for Agents Time-Off Planner**; see the topic "Requesting Time Off".

After an agent's Time-Off request has been granted, scheduled, and published to the Master Schedule, the agent cannot recall the time off.

Only the supervisor can do that, by manually changing the agent's schedule for that date, through the Master Schedule. And only the supervisor can schedule a different activity for the agent for that date, in lieu of the time off.

Wait Listed Time Off Requests

When an agent makes a Time-Off request, he can optionally ask for it to be wait-listed. (See step 7 in the *Workforce Management Web for Agents Help* topic "Requesting Time Off": *If you want your request to be wait-listed, click the Wait-list check box*.)

> ### Important
>
> Wait-listing means that if a Time-Off request is denied because the Time-Off limits have been reached, the request stays in a preferred status in case an opening becomes available. The request could eventually be granted by a supervisor, although this is not guaranteed.

In detail, this means that if the Time-Off request would be declined because the Time-Off limits have already been reached, wait listing gives it a preferred status. If some Time-Off slots become available for certain dates due to cancellations, or if the Supervisor decides to raise the Time-Off limits for a certain date, the Supervisor user can review all of these preferred Time-Off items in the Calendar and grant some of them. There is a field in the Calendar which displays the date and time that the Agent or Supervisor submitted each Time-Off item, to help the supervisor manage the wait list. Agents' Time-Off requests are not pulled automatically from this wait list; these requests must be manually granted by the supervisor.

Viewing the Status of Time Off Requests

Agents can view the status of any Time-Off request, for any calendar date, with some limitations. If an agent requests time off for a date on a schedule that is already been published to the Master Schedule:

- This request will not be scheduled.
- The Agent can view the reason it was not scheduled, in the Reason column.
- The request, with the same status and reason, will appear in the WFM Calendar, where Supervisors can see it.

However, the supervisor will not know to look for the request unless the agent tells him to look for it. Therefore, if an agent sees Time-Off requests with status **Not Scheduled** in the **Time-Off Planner**, she should alert her supervisor.

The supervisor can then do one of two things:

1. Grant the time off through the WFM Calendar and rebuild/republish the agent's schedule for the affected date(s).
2. Manually add the time off to the Master Schedule.

The Time-Off Planner gives agents a limited view into their Time-Off status in the WFM Calendar. Therefore, when a supervisor adds or deletes time off in the WFM Calendar, he must rebuild and republish the schedule for the affected date(s).

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