Genesys Engage cloud Workforce Management 8.5.1 Guide

Time-Off Types

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Time-Off 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.

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, 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

To create a new time-off type:

1. Select the **Policies** tab.
2. Select **Time-Off Types** from the **Views** menu.
3. 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.

4. Select **New** from the **Actions** menu or the **New** icon ( ) from the toolbar.

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5. Configure the new object on the **Properties** tab and the **Associated Sites** tab in the **Data** pane.

6. Click **Save** when you are finished.

Editing Time-Off Types

To edit a time-off type:

1. Select **Time-Off Types** from the **Views** menu.

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. Select **Time-Off Types** from the **Views** menu.

2. Select one or more time-off type(s) from the list in the **Data** pane (hold down **SHIFT** or **CTRL** to select multiple items).

3. Select **Delete** from the **Actions** menu or the delete icon ( ) from the toolbar.

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

Properties Tab

- **Time Off Type Name**—This name should be descriptive and must be unique within the site.
- **Short Name of Time Off Type**—This 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 default value is **Keep with Schedule**.

Associating and Disassociating Sites

1. Select the check box of each site to associate with the current time-off type.

2. Clear the check box of each site to disassociate with the current time-off type.

3. Click **Save**.