GENESYS

Workforce Management Web for Agents Help (Classic)

Time Off Pane

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Contents

Time Off Pane

The Time Off pane includes two main sections:

1. The balance pane shows your time-off balance for the type of time off that you select in the drop-down list in the upper left corner of the Time Off window. The legend describes what each color represents.

2. The calendar shows time-off requests and their status. Days for which you have time-off requests are shown in color. This color changes depending of the status of the request.

If time-off bidding is permitted in your contact center, you might also see the Bidding Periods section. It contains information about the time-off bidding periods that are applicable within the period displayed in the calendar.

Time Off Calendar

Link to video

Each date in the time-off calendar has a check box next to it, enabling you to complete the following tasks:

- Create time-off requests. See Requesting Time Off.
- Change existing requests. See Editing Time Off Requests.
- Recall submitted requests. See Recalling Time Off Requests.
- Delete requests. See Deleting Time Off Requests.

To display the time-off data for a particular day in the calendar, hover the cursor over that day's cell. A pop-up window displays all the time-off data that exists for that day, which can include: Date, Name, Start/End Time, Status, Reason, Comments.

Comments are notes that are entered by a supervisor or manager when the time-off item is either granted or declined.

Reason is an explanation of why a time-off item has a certain status, such as Declined or Not Scheduled.

Balance Pane

To see your balance for a specific time-off type, select the time-off type from the drop-down list at the top left part of the Time Off pane.

> ## Important
> The information in the balance pane is for the selected time-off type only. Use the drop-down list box to select a different time-off type, to see your balance for that type. Inside the list box, the time-off types that you can request and edit are listed above the "—*Others*—" legend, and the time-off types that you cannot use are listed below it.

This table explains each category that appears on the balance pane.

Time-Off Hours *section*	Accrued	Total accrued time-off hours for the current period, up to the selected day. (To view the total accrued hours for the entire period, select the last day of the period.)
	Bonus	Total bonus time-off hours. Bonus hours are awarded and configured by your supervisor or scheduling manager and are included in your total time-off balance. Supervisors determine when they are awarded, the number of hours that are awarded, and when they can be used (based on the start and expiration dates). Bonus hours are extracted from time-off balances before accrued time-off hours. If you are unsure of how and when you can use your bonus hours, ask your supervisor or manager.
	Carried Over	Total time-off hours carried over from the previous period. Some companies limit the number of hours that you can carry from one year to the next.
	Credit	Total time-off hours that can be taken in advance, if applicable. Some companies allow you to request more time off than you currently has accrued, with the expectation that you will accrue the necessary time before the end of the year.
	Scheduled	Total scheduled time-off hours for the period, up to the selected day. To view the total scheduled hours for the entire period, select the last day of the period. You

		cannot remove Scheduled or Granted time off in Time Off module, but can remove Preferred time off.
	Granted	Total requested time-off hours that have been granted. To view the total granted hours for the entire period, select the last day of the period.
	Exceptions	Total part-day exceptions used as time-off hours that have been granted.
	Preferred	Total hours of *preferred time off* (requested, but not yet declined, granted or scheduled). To view the total preferred hours for the entire period, select the last day of the period.
	Balance	Total time-off hours for the current period, up to the selected day. The balance is calculated as the sum of accrued, bonus, carried-over, and credit hours, minus granted, preferred, exceptions, and scheduled hours. Note that the limit to this balance can be exceeded. If the limit is reached before the end of the Accrual Period, an agent can progressively accrue more time off if he requests it, and his Supervisor grants it.
	Accrual Period Total	Total hours of time off for which you are eligible in the current period. This value changes only when you select a day in a different time-off period.
	Lead Time (weeks)	If the supervisor has enabled time-off auto-granting, you can enter your time-off preferences at least this number of weeks before the first desired time-off date. Your preferences are granted automatically if your absence would not excessively burden the company, and if you have enough time-off hours available to cover the request. If your supervisor has not enabled auto-granting, Lead Time is not displayed in this section.
Legend		Each status—Declined; Granted; Preferred; Scheduled, Recalled; Scheduled; Not Scheduled; Recalled; and Partial—is represented by its own color. *Partial* indicates a part-day time-off request.

> ### Important
>
> The Bidding Period section displays only if time-off bidding is permitted in your contact center and there are bidding periods with dates that are within the period displayed in the calendar.

Bidding Periods *section*	Displays all of the bidding periods that are configured for the selected year, but not yet processed.	
	Name:	The name of the bidding period.
	Opening Date:	The opening date and time of the bidding period, and the date on which you can begin to request time off for this bidding period. If you request time off for this bidding period before this date and time, you will receive an error message.
	Start Date:	The date and time that the bidding period starts or opens.
	End Date:	The date and time that the bidding period ends or closes.
	Start Processing:	The date and time that the bidding period requests processing starts.
	Finish Processing:	The date and time that the bidding period requests processing stops.
	Maximum Weeks:	The maximum number of time-off weeks allowed per bidding period.
	Maximum Days:	The maximum number of time-off days allowed per bidding period.
	Maximum Hours:	The maximum number of time-off hours allowed per bidding period.
	Minimum Consecutive Days:	The minimum number of consecutive days allowed per request.
	Message: *link*	When clicked, enables you to view notes or additional information about the bidding period. **Note:** The link is not present if supervisor does not add notes.
	Status: *link*	When clicked, opens a dialog that enables you to change the

		current status of your requests for a specific bidding period. You can choose **Entering** or **Ready**. The dialog also includes the name of the bidding period, the current status, and the date and time when the status was last set. See Statuses in the Bidding Period.

Each date in the calendar is also a link. Click the date link to update the balance pane so that it shows your time-off balance for the date you clicked instead of for the current date. For example, click the date for the day before you would like to take a vacation to see whether you will have accumulated enough time off by then to take your vacation.

> ## Important
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> - The information you see when click the date link is for the current time-off period. This is the time since the last carry-over date (often January 1), or, if the carry-over date has not yet occurred, the time since your date of hire. The carry-over date might be different for the different types of time off.
>
> - If there are no bidding periods configured for the selected year, the **Bidding Periods** information is not displayed.

Statuses in the Bidding Period

You can have one of the following statuses at various times during bidding period processing:

- **Entering**—This status is automatically assigned to you when the bidding period opens, indicating that you can enter time-off requests that will be processed in the current bidding period.
  You can set this status at any time to indicate that you are changing a time-off request.
  Your supervisor can also set this status.

- **Ready**—You set this status after you submit your time-off requests, indicating that they are ready for processing within the current bidding period.
  Your supervisor can also set this status.

- **Skipped**—This status indicates that bid assignment process should ignore your requests.
  You cannot set this status.
  Your supervisor can set this status at any time.

- **Waiting**—Set when the bid assignment process cannot grant all of your requests, due to limitations set in the time-off rule or time-off limits. The process will wait for you to change your requests or enter new ones. When the waiting period is over or the process finds that you have changed your requests, the process resumes and your requests can be granted.

Set by the bid assignment process; neither you nor your supervisor can set this status.

- **Granted**—Set when all of your requests have been successfully granted.
  Set by the bid assignment process; neither you nor your supervisor can set this status.

- **Timed Out**—Set when the time allotted to allow you to edit or enter time-off requests has expired. At this point, the bid assignment process will move on to the next agent.
  Set by the bid assignment process; neither you nor your supervisor can set this status.

When Time-Off Types No Longer Apply

A drop-down list box in the upper-left corner of your Time-Off Planner displays all the time-off types that are configured for your site. Some of these may not be relevant to you. (Agents are assigned to time-off rules, which in turn are associated with time-off types.)

You can create, edit, delete or recall time-off requests only for time-off types that are assigned to you. Also, you can see "old" time-off types (no longer assigned to you that correspond to time-off rules, but you cannot change them. They appear below the —*Others*— legend in the drop-down list.

The time-off types that you can use appear above the "—*Others*—" legend.

Workforce Management enables you to select a time-off type from below the "—*Others*—" legend in the drop-down list box, but you will not be able to perform any tasks with it (such as requesting time off or viewing your time-off balance).