Workforce Management Web for Supervisors Help

Add or Edit Time-Off Items

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Add or Edit Time-Off Items

Use this dialog to add new time-off items or edit existing ones.

If you select **Time Off** on the **Add Calendar Item** screen, then the **Choose Time Off** screen appears when you click **Next**.

1. Select a time-off type from the **Choose Time Off** list.
   This list shows all of the time-off types that are configured for the selected site.

2. Select the **Show all** check box to display all time-off types. Clear this check box to display only the time-off types that are applicable to the selected agent.

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

3. Optional: select the **Full Day** check box if the time-off preference is for a full day off.

4. Optional: Adjust the **Start time** and **End time** for this time-off item, if the default values are not correct.

5. 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.

6. Select **Next Day** to the right of the **End Time** text box if duration of the time off ends on the day after it begins.

7. Optional: Specify a nonstandard length of your full-day time-off request.

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

> ### Important
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> If you are adjusting part-day time-off preferences, remember that all part-day time-off preferences must comply with all settings for at least one qualifying shift, including meal parameters. You might not need to adjust this value manually. If you selected a single agent, then the default is the number of paid hours/minutes configured for the agent's time-off rule, for the time-off type being inserted. If you selected multiple agents, the default value is 0 (zero).

9. Optional: Select the **Wait-list** check box to specify that the request stays in a **Preferred** status, if a time-off request is denied because the time-off limits have already been reached.
   The request could eventually be granted by a Supervisor, if an opening becomes available, although this is not guaranteed.

10. Optional: Enter a comment inside the **Comments** text box.

11. Click **Finish**.
     The Calendar reappears, displaying the new or edited time-off item.

Important

If you are entering multiple part-day time-off items, these cannot overlap each other or any part-day exception.