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## Workforce Management Web for Agents Help (Classic)

Time Off

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## Time Off

The **Time Off** view provides everything you need to manage your time-off requests. Clicking **Time Off** in the Menu bar (or top rail) opens a 12-month calendar for the current year and in the left-most pane, details about time-off types and time-off bidding periods.

### Tip

If you do not see **Time Off** in the Menu bar, then the Time-Off Planner is not enabled for your contact center.

## Viewing your time-off in the calendar

**GENESYS** Selected time-off type.

New Edit Recall Delete

Holiday1

November 17, 2017  
Available (in hours)

Accrued: 4:17  
Bonus: 0:00  
Carried over: 0:00  
Credit: 30:00  
Scheduled: 0:00  
Granted: 0:00  
Exceptions: 0:00  
Preferred: 0:00

Balance: 34:17

You have (in hours) for the period from 11/17/17 to 12/31/17.

Accrual period total: 192:51

**Legend**

- Declined
- Preferred
- Scheduled
- Recalled
- Granted
- Scheduled, recalled
- Not scheduled
- Partial

**Bidding periods (3):**

Name: Time-Off Bidding Period1  
Opening Date: 2/9/17 10:00 AM  
Start: 2/9/17 11:00 AM  
End: 2/9/17 2:00 PM  
Start Processing: 2/9/17 10:10 AM  
Closing: 2/9/17 10:30 AM  
Maximum Weeks:  
Maximum Days:

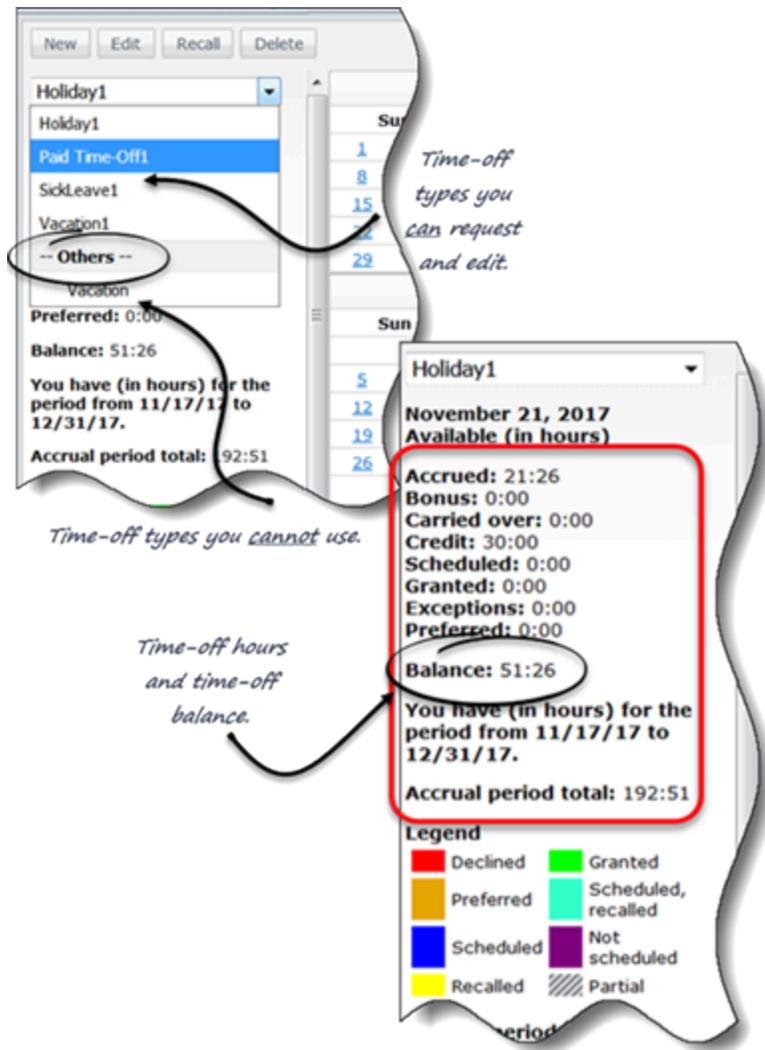
*Time-off details for the selected date and color-coded status of the request.*

*The date selected here displays below the time-off type drop-down menu.*

Using the **calendar**, you can view selected time-off types and their details, including the **status** of your requests, for specific dates. Use the drop-down list to select the time-off type and the **Legend** to understand the color-coded statuses.

You'll notice that each date in the calendar is underlined. Click on any date and it appears under the Time-off type drop-down list, displaying the time-off details for that date.

## Viewing your time-off balance

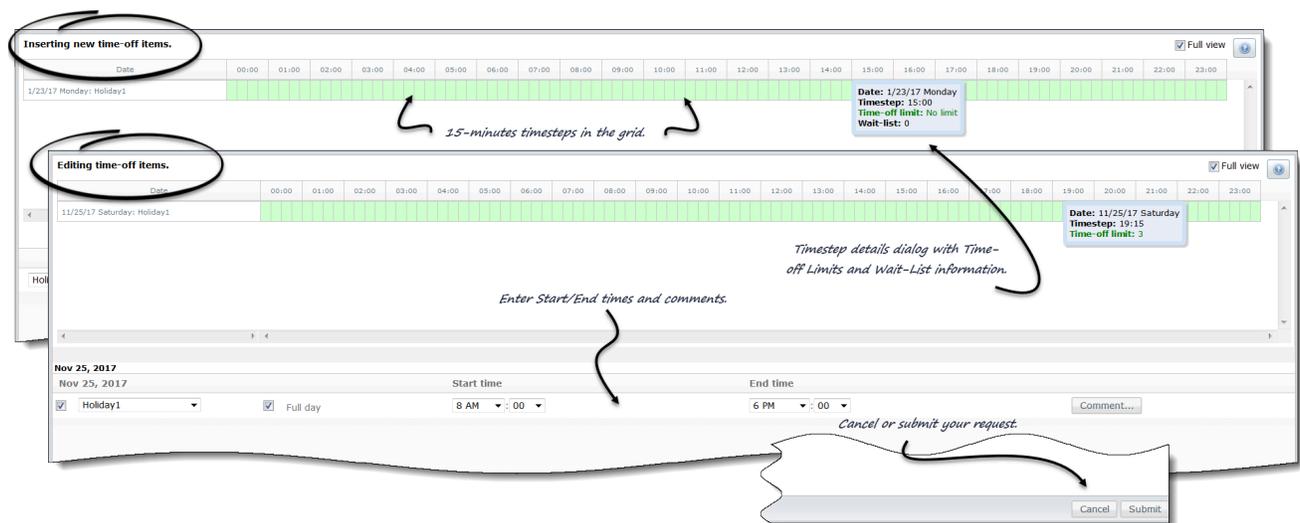


Use the calendar to view your **time-off balance** for specific time-off types and dates. Your time-off balance is the combined total of several types of time-off such as, accrued, carried over, bonus, scheduled, granted, credited, exceptions, preferred. The number of time-off hours accumulated for each is shown in the details when you select a time-off type. They are described in detail in [Time-Off Hours](#).

Also shown, is the **Accrual Period Total**, which is the total number of hours accrued for the period specified just above it in the details section. A *period* is defined as a time interval or *period of time*.

The list of time-off types is divided into two parts—The time-off types above **--Others--** and the types below it. You can request and edit only the types above it. The types below are no longer applicable to you.

## Managing your time off



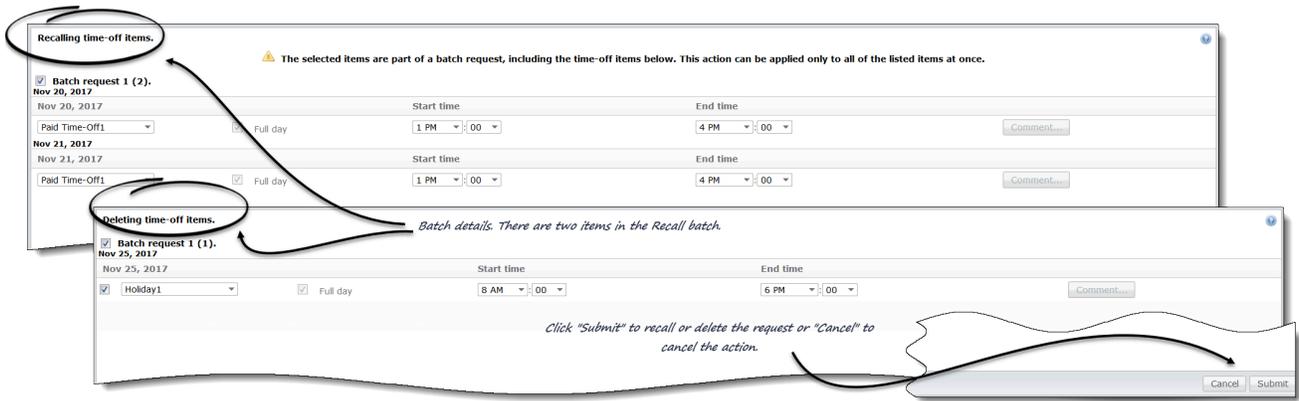
You manage your time-off requests, by using the four command buttons (**New**, **Edit**, **Recall**, and **Delete**) in the top-left corner of the **Time Off** pane.

Selecting one or more dates in the calendar and clicking any one of these buttons opens the appropriate view (inserting, editing, recalling, deleting time-off requests) where you will:

- Set the start and end times for your requests.
- Indicate whether your request is for a full or part day.
- Make changes to them.
- Add comments.
- Submit or cancel your requests.
- Recall or delete existing requests (not yet granted or scheduled).

The grid in the upper section of new and edited requests shows the entire day, divided into 15-minute timesteps. To find out if there are **time-off limits** or if your request is **wait-listed**, hover your cursor over any timestep to see this information in a pop-up dialog.

## Time Off



You won't see the **Time-Off Limits** grid when you are recalling or deleting your requests. You'll see only the time-off request details and, if the request is part of a batch, the batch details.

WFM processes each request as a batch. A request you submit for multiple dates is considered 1 batch containing multiple items. Therefore, when you recall any time-off item in a batch, WFM performs the action on all items submitted in that batch. You can only select or deselect items from the same batch together, not separately.

## Viewing time-off bidding periods

The screenshot displays a list of bidding periods in a software interface. The list is titled "Bidding periods (3):". The first entry is "Time-Off Bidding Period1" with details: Opening Date: 2/9/17 10:00 AM, Start: 2/9/17 11:00 AM, End: 2/9/17 2:00 PM, Start Processing: 2/9/17 10:10 AM, Closing: 2/9/17 10:30 AM. A red box highlights the constraints: Maximum Weeks, Maximum Days, Maximum Hours, and Minimum Consecutive Days: 1. The status is "Processed". The second entry is "Time-Off Bidding Period1\_1" with details: Opening Date: 5/21/17 10:00 AM, Start: 5/24/17 11:00 AM, End: 6/10/17 2:00 PM, Start Processing: 5/22/17 10:10 AM, Closing: 5/23/17 10:30 AM. The status is "Processed". The third entry is "BiddingAug" with details: Opening Date: 6/23/17 12:00 AM, Start: 9/1/17 12:00 AM, End: 9/7/17 12:00 AM, Start Processing: 8/25/17 12:00 AM, Closing: 8/31/17 12:00 AM. The status is "Entering". A fourth entry, "TOB\_NovDec", is shown in a separate box with details: Opening Date: 11/23/17 8:00 AM, Start: 12/19/17 12:00 AM, End: 12/21/17 12:00 AM, Start Processing: 12/11/17 12:00 AM, Closing: 12/14/17 12:00 AM. The status is "Entering". Handwritten annotations include: "The number of bidding periods displayed in this pane." pointing to the title; "Bidding period constraints." pointing to the red box; "Supervisors can add messages or additional information for agents" pointing to the message field of the TOB\_NovDec entry; and "An open bidding period with agent's status set to 'Entering'." pointing to the status of the BiddingAug entry.

In some contact centers agents can bid for time-off (it's sometimes called "vacation bidding"). Supervisors create bidding periods with certain rules or constraints that occur or are *open* for a period of time. You and your teammates can see the bidding period details in the left-side pane in the **Time-Off** view.

There might be more than one bidding period open or being processed at the same time, as bidding

periods can overlap.

You can bid for time off between the **Opening** and **Closing Date** for the bidding period. To enter a time-off bid, you **create and submit a time-off request**. After you've done so, click the **Status** link to change your status from **Entering** to **Ready**. This lets your supervisor know your request is ready for processing.

You might see other **statuses** in the bidding details that you didn't add and cannot change. Your supervisor can set your status to **Entering**, **Ready**, or **Skipped**. WFM automatically sets other statuses at various stages of processing, such as **Waiting**, **Processed**, and **Timed Out**.

For more information about how your requests are processed within bidding periods, see [Submitting Time-Off Bids](#).

### Tip

If you do not see Bidding Periods details in the left-side pane, either there are no open bidding periods or Time-Off Bidding is not enabled in your contact center. Also, time-off bidding is different from schedule bidding. To enter bids for schedules, use the [Bidding](#) view.