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Workforce Management Web for Supervisors Help

Assigning Time-Off Rules

5/5/2025

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Assigning Time-Off Rules

Use the **Time-Off Rules Assignment** pane to assign agents and time-off types to a time-off rule.

Associating Agents and Time-Off Types to Rules

To associate agents and time-off types to time-off rules, watch the video and/or complete this procedure:

Link to video

- 1. In the time-off rules Assignments pane, click Associate Agents and Time-Off Types with this rule
- 2. Enter a **Start Date** and **End Date** for this rule assignment.
- 3. Click Add Agent(s) to a Time-Off Rule _____. A pane containing a list of available agents opens.
- 4. Select one or more agents to associate with this rule and then, click **Apply The selected available agents are moved to a list of assigned agents.**
- 5. In the Time-Off Types section, click Add Time-Off Types to a Time-Off Rule Another pane opens, enabling you to select from a list of time-off types.
- 7. In the Associate following agents and time-off types with rule pane, click Apply 🎬 again.

Disassociating Agents and Time-Off Types

To disassociate agents and time-off types to time-off rules:

- 1. In the assigned agents and time-off types lists, select the items you want to disassociate from this rule.
- 2. Click Remove Agents and Time-Off Types association from this rule
- 3. When the confirmation dialog appears, click **Yes** to proceed or **No** to cancel the action.

Associating Agents Based on Hire Dates

Use the following procedure to perform bulk assignments of time-off rules, based on the agents' hire date.

• * به					Click the Sort menu. 🔶 🗸 💘 🥹						
ASSOCIATE FOLLOWING AGENTS AND TIME-OFF TYPES WITH RULE					Q Search agent						
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Jun 23, 2020					AGENTS						
End Date					Team		First Name	I Last Name		Team	
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				8	Team1_1		AgentF04	AgentL04	Jan 1, 2017		
There are no agents to display					Team1_1		AgentF05	AgentL05	Jan 1, 2017		
نه						⊷ × ⊌	AgentL06	Jan 1	, 2017		
Q Search agent								AgentL07	Jan 1, 2017		
Search by: First Name Last Name AGENTS								AgentL08	Jan 1, 2017		
								AgentL09	Jan 1, 2017		
		Team I	First Name	Last Na	me	🛚 🔺 Hire	Date I	AgentL10	Jan 1	, 2017	
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<< > >>	8	Team1_1	AgentF02	AgentLC)2	Jan 1, 2	017				
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		AgentF05	AgentL05		Jan 1, 2	017					
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Email Team1_2 AgentF10			AgentL10		Jan 1, 2	017					
	-										

- 1. In the time-off rules Assignments pane, click Associate Agents and Time-Off Types with this rule
- 2. Enter a **Start Date** and **End Date** for this rule assignment.
- 3. Click Add Agent(s) to a Time-Off Rule . A pane containing a list of available agents opens.
- 4. Click **Sort** and choose **Hire Date**.
- 5. Select one or more agents to associate with this rule, based on the hire date and then, click Apply

The selected available agents are moved to a list of assigned agents.

6. To assign time-off types, complete steps 5-7 in the procedure above.

When selecting **Hire Date** in the **Sort** menu, you can toggle it to display in ascending or descending order, or toggle it in the column header.

To select multiple rows in lists, use the Shift+Space keys on the keyboard, or hold down the Shift key and use your mouse. Simply hold down the Shift key and either click the first and last row you want to select or click each row, one after the other.