



All About Auto-approve

Webinar handout
Version: April 16, 2026



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About this document

This document accompanies the CommunityWFM College webinar *All About Auto-approve*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

Auto-Approve Service

CommunityWFM can auto-approve or auto-deny time off requests based on configurable rules.

Rules are available in both the Enterprise (Ultimate) and Essentials (Standard) versions of WFM, however, the advanced vacation features such as accruals, calendar partitions, and waiting list are only available in the Enterprise version.

The auto-approve service is not enabled by default. After creating rules, enable the service in Settings > Application settings > Administrative settings > Services. See [How to enable the auto-approve service](#).

Rules

There are three rule types:

1. **Agent Blackout Date Rule:** tells CommunityWFM which days to automatically deny and no one will get time off requests approved on those days. This might include days when the center is closed, so agents don't mistakenly use vacation time on this day.
2. **Agent Brownout Date Rule:** tells CommunityWFM how many requests, or what percentage of agents, or how many hours (calendar partition rules only) to approve automatically and then it will start denying any additional requests. It's first come-first served only (i.e., not based on seniority or other ranking profile).

Note: You can create different brownout rules for each day of the week and have different rules for each Activity.

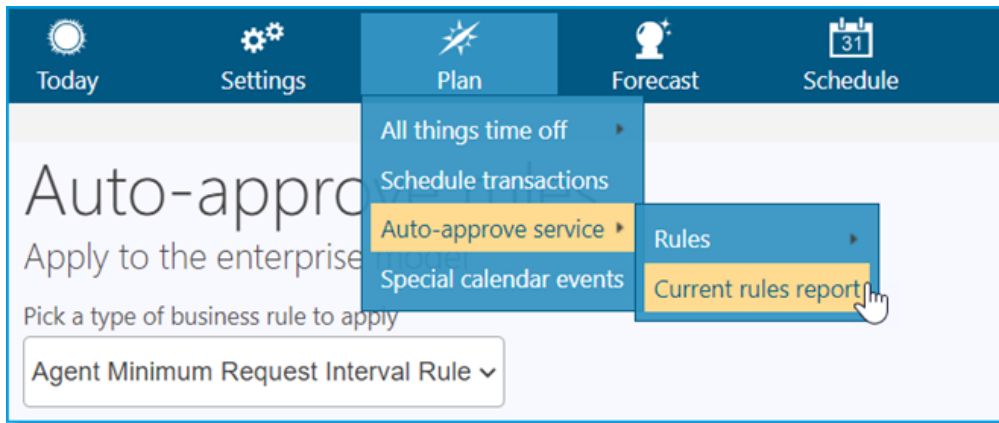
- Partial or fractal day approval is only available in a calendar partition.
- Brownout rules may be associated with a [waiting list option](#) when using calendar partition rules.



- Agent Minimum Request Interval Rule:** determines how many days in advance agents must make the request. Should requests be at least two weeks in advance? Or can agents make a request today to have tomorrow off?

View current rules

To view existing rules, run the *All Auto-Approve business rules* report (Plan > Auto-approve service > Current rules report).



You can view rules by activity or supervisor.

All Auto-Approve business rules

Rules applied to activities | Rules applied to supervisors

Show all auto-approve rules applied to the enterprise model

Rule name	Activity name	Start date	End date	Modified by
Agent Brownout Date Rule	Customer Program Service	Monday, March 10 2025	Monday, March 31 2025	Account, Service
Agent Brownout Date Rule	Site 1 - Dallas, TX	Thursday, January 01 2026	Thursday, December 31 2026	Bodine, Cathi
Agent Minimum Request Interval Rule	Site 1 - Dallas, TX	Thursday, January 01 2026	Thursday, December 31 2026	Bodine, Cathi
Agent Blackout Date Rule	Site 1 - Dallas, TX	Monday, February 16 2026	Monday, February 16 2026	Bodine, Cathi
Agent Blackout Date Rule	Site 1 - Dallas, TX	Monday, May 25 2026	Monday, May 25 2026	Bodine, Cathi

Creating each rule type

First, configure the rules for your center.

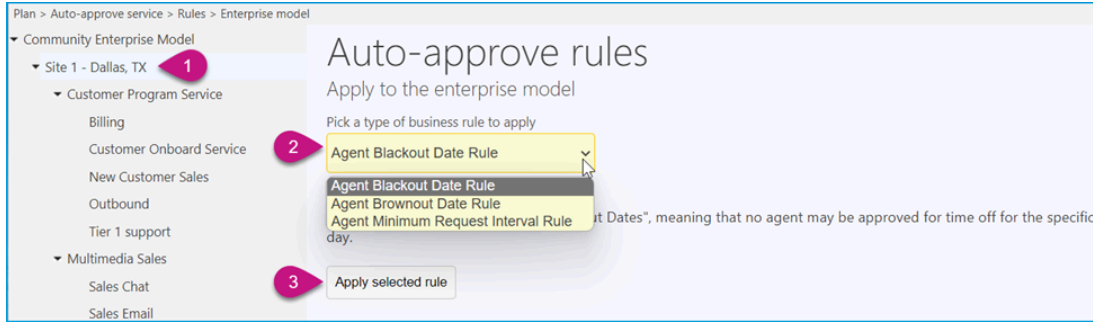
Navigate to Plan > Auto-approve service > Rules > Enterprise Model | Supervisor tree.

This is where you apply rules by Activity, supervisor, or for the entire center.

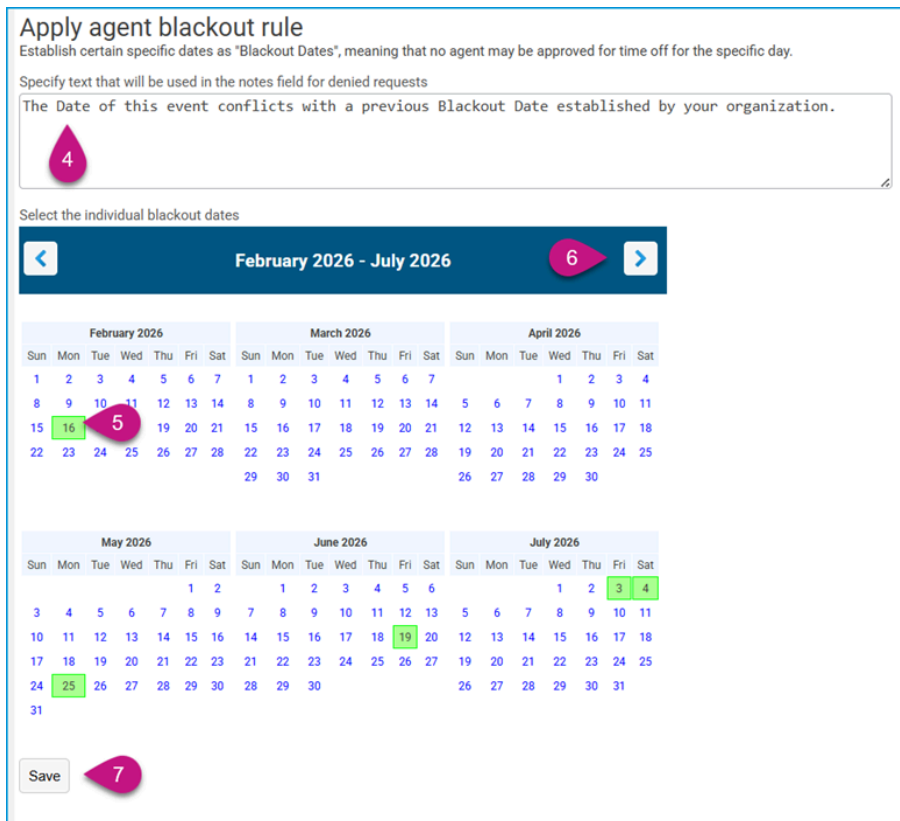


Agent Blackout Date Rule

1. In the left navigation pane, click on the Center, a Site, Folder, or Activity.
2. Select *Agent Blackout Date Rule* from the *Pick a type of business rule to apply* drop-down.
3. Click *Apply selected rule* to create the new rule.



4. Edit or add your custom denial message.
5. Click to select the date(s) on the day in the calendar. Click again to de-select.
6. Use the arrows to advance to the next months.
7. After selecting all black-out dates, click Save.



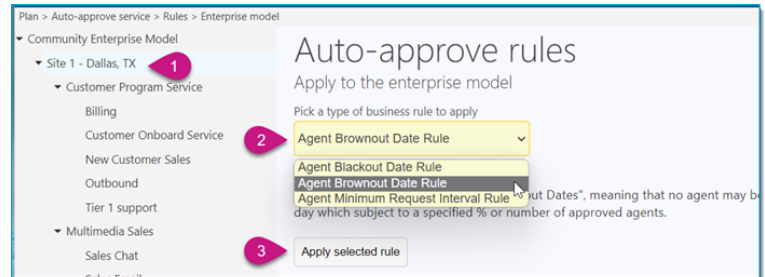


Any request for the days you specified will be automatically denied and agents will see the custom message.

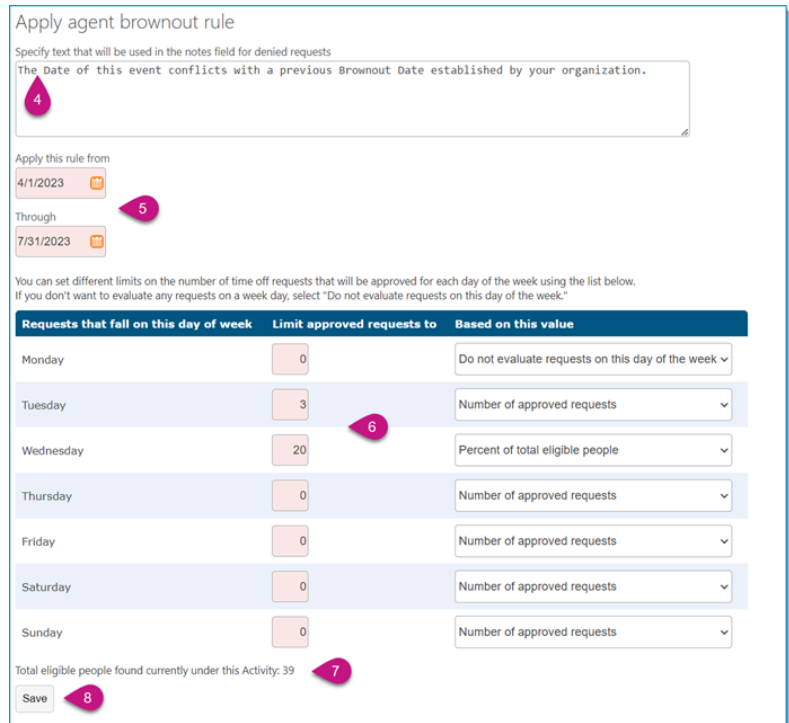
Agent Brownout Date Rule

Brownout rules can be specific to an Activity so work with one Activity at a time. Think of brownout rules as slots per day, not time of day. It's how many people can be off per day, not dependent on the time of day that they work. *See below for using partial day requests in a calendar partition.

1. Select an Activity.
2. Select *Agent Brownout Date Rule* from the drop-down.
3. Click *Apply selected rule* to create the new rule.



4. Edit or add your custom denial message.
5. Enter the date range for this rule.
6. Set the number or percentage of agents who are approved for any given day, or select *Do not evaluate requests on this day of the week* (i.e., no brownout rule for the day). It's date driven so you can have seasonal brownout rules.
7. Notice the total number of people with this skill indicated at the bottom of the page.



8. Click *Save*.

Apply brownout rules to the rest of the activities if needed.

If there are frequent staffing fluctuations due to training, meetings, etc., CommunityWFM can approve or deny based on a **percentage** of staff for any given day.

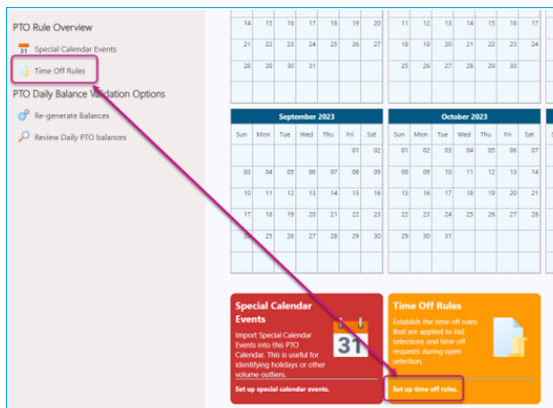


**Partial day requests – calendar partition*

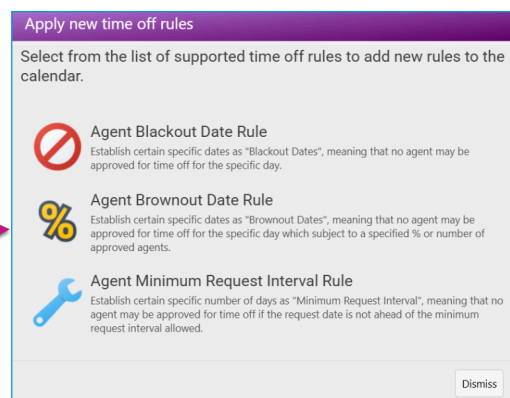
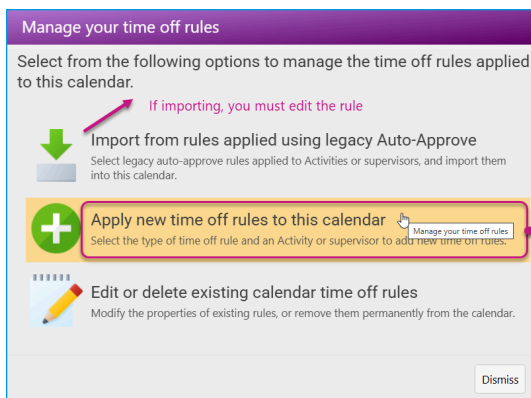
When using a calendar partition, CommunityWFM can evaluate partial day requests and take this into account when calculating the number of hours used when people request time off. **This rule must be created and edited within a calendar partition**, and is only available when agents have PTO Calendar Partition Rules as their source of time off rules.

For this feature, the brownout rule must “Limit to a fixed number of approved hours of time off.” E.g., If Greg requests 4.0 hours, and there is a brownout rule that only 8 hours are allowed, another agent can take 4.0 hours off without triggering the brownout rule. **Note:** this does not consider the time of day, so even if both requests are for the same 4-hour block, it will grant both requests.

1. In the calendar partition (Plan > All things time off > PTO Calendars > Calendar partitions > Rules, Events,& Available PTO), select *Time Off Rules* in the left navigation pane, or click *Set up time off rules* in the tile below the calendar.



2. Click *Apply new time off rules to this calendar* and select the rule type.





Note: If importing legacy rules, you must edit each rule.

3. Select who the rule will apply to.
4. Edit or add your custom denial message.
5. Enter the date range for this rule.
6. Click *Set brownout parameters*.

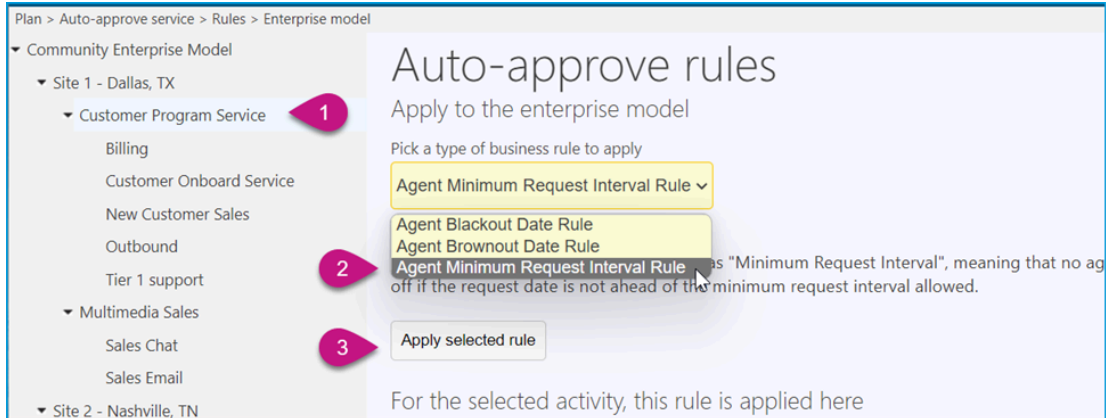
The brownout date parameters in a calendar partition includes an additional option: *Limit to a fixed number of approved hours of time off*.

7. Enter the number of hours of time off allowed for the day (or number of requests, or percentage, or do not restrict).
8. After making a selection for each day, click *Save rule*.

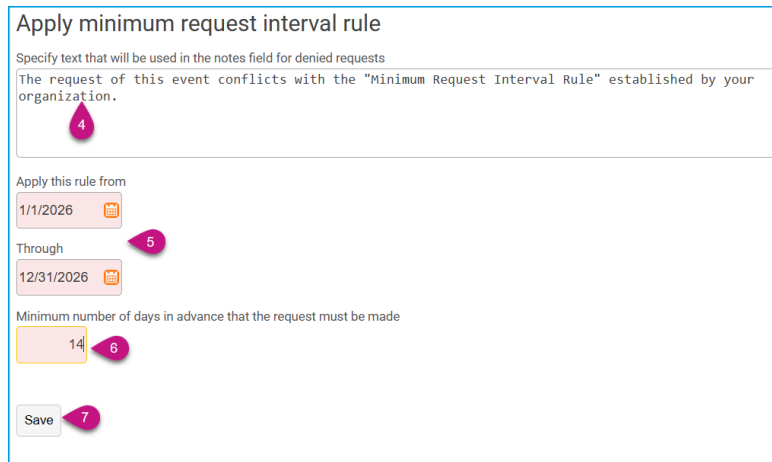


Agent Minimum Request Interval Rule

1. Click on a Site, Folder, Activity, or the call center.
2. Select the *Agent Minimum Request Interval Rule*.
3. Click *Apply selected rule*.



4. Add your custom denial message.
5. Put in a nice wide range of dates so you will not have to remember to adjust it.
6. Enter the number of advance days, i.e., how many days in advance an agent must make the



time off request. Can they ask for tomorrow off or are they required to give two weeks' advance notice?

Note: This rule only looks at the date, not the time of day (i.e., it doesn't distinguish between a request made at 12:01 am and 11:59 pm).

7. Click Save.



Time off rule settings

Customize the time off rules for the different time off rules sources by turning the rules on or off.

Navigate to Plan > All things time off > Time off settings > Time off rule settings then select the time off rules source in the left-side column.

Customize timeoff rules

Turn specific timeoff rules on and off for the different timeoff rule sources.

Choose a timeoff rule source

Legacy AutoApprove Rules
To automatically enforce time off rules for this person, use the rules defined under the classic AutoApprove function.

PTO Calendar Bid Round Rules
Use the rules defined in a PTO calendar partition, but with the extra bid round validators in place.

PTO Calendar Partition Rules
Use the rules defined within a PTO calendar partition for this person to enforce time off rules.

Waitlist Queue Rules for Calendar Partition Rules
Use the rules defined to re-evaluate time off requests saved in the waitlist queue originating from PTO calendar partition rules.

Configure timeoff rule behaviors

Please choose a timeoff rule source to see available timeoff rules.

After selecting a rules source, the available options appear on the right. Click the edit/pencil icon to edit the rule.

Configure timeoff rule behaviors										
Time off rule ID	Name	Description	Editable?	Implied enforced?	Default Validate at runtime?	User enabled?	User Validate at runtime?	Eligible for waitlist?	Configured for waitlist?	
5	Agent Accrued Hours Rule	Ensure the person has sufficient time off hours accrued prior to approving the time off request	No	No	Yes	Yes	Yes	No	No	
1	Agent Blackout Date Rule	Establish certain specific dates as "Blackout Dates", meaning that no agent may be approved for time off for the specific day.	No	No	Yes	Yes	Yes	No	No	
2	Agent Brownout Date Rule	Establish certain specific dates as "Brownout Dates", meaning that no agent may be approved for time off for the specific day which subject to a specified % or number of approved agents.	Yes	No	Yes	Yes	Yes	No	No	
7	Agent Hire Date Eligibility Delay Enforcement Rule	Ensure that the person is no longer within the hire-date eligibility delay period.	No	No	Yes	Yes	Yes	No	No	
3	Agent Minimum Request Interval Rule	Establish certain specific number of days as "Minimum Request Interval", meaning that no agent may be approved for time off if the request date is not ahead of the minimum request interval allowed.	Yes	No	Yes	Yes	Yes	No	No	
6	Agent Restricted Activity Plan Enforcement Rule	Ensure that the agent is not on a restricted activity plan and is eligible to submit time off requests.	No	No	Yes	Yes	Yes	No	No	



Each rule allows the option to enforce the rule, and whether to validate the rule when the agent makes a request. Enabling the waitlist is available for brownout rules within a calendar partition.

Customize a time off rule for a time off source

Agent Accrued Hours Rule

Enforce this time off rule?
Yes, enforce this time off rule for the selected source. ▾

Validate this rule when people are making requests?
Yes, include this rule in people's runtime request validation. ▾

Enable waitlisting on failure for this rule?
No, do not allow users to enter a waitlist queue. ▾

Waitlisting is not available for this time off rule.

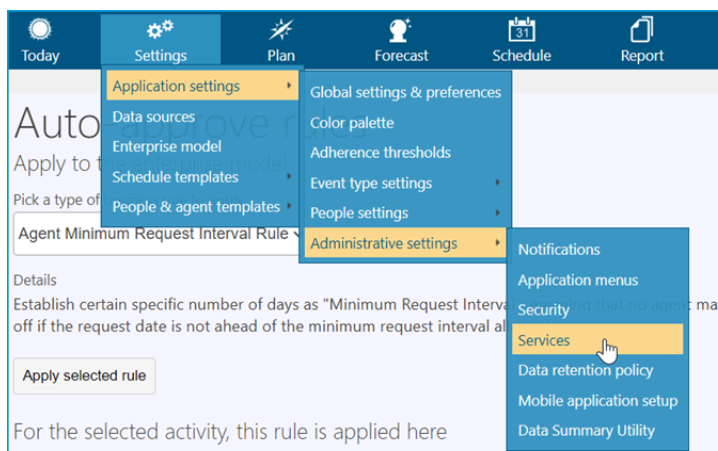
Save Cancel

How to enable the auto-approve service.

Some centers may ease into the auto-approve system and have CommunityWFM auto-deny requests to start. As you become more comfortable, you may choose to start using the full auto-approve system.

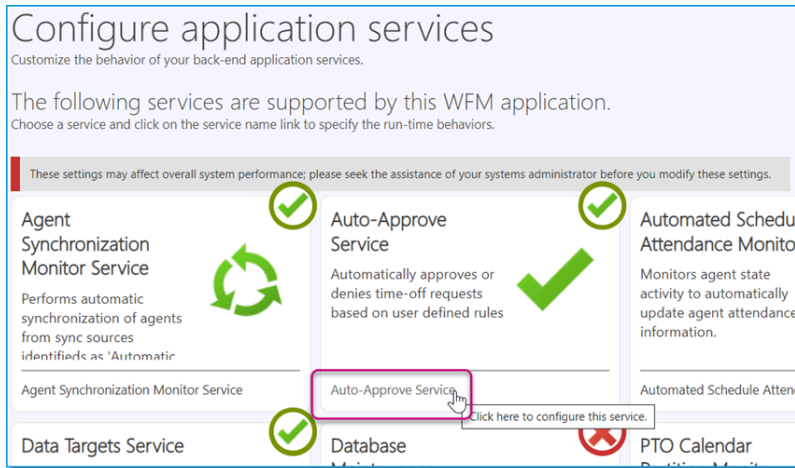
Note: You can always override a denied request if you find that you can allow more agents time off, and conversely you can always manually change a request from *approved* to *denied* if needed.

Go to Settings > Application settings > Administrative settings > Services





1. Select *Auto-approve service*.



2. **Service Enabled?** Select Yes to enable the service.

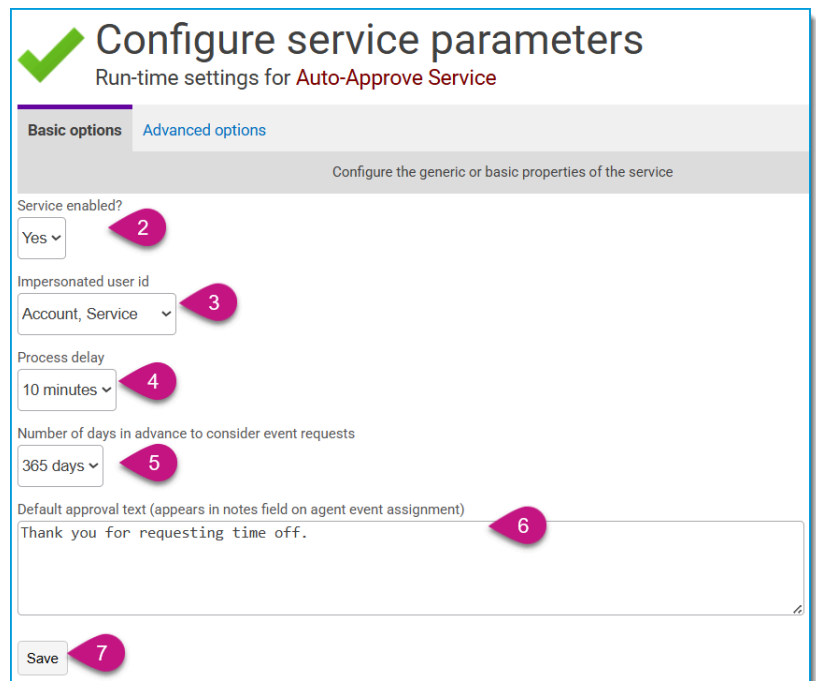
3. **Impersonated user id:** When you approve or deny a request, the notification must come from someone. Who do you

want as the auto-approver/denier? We recommend that you have a “WFM administrator” be the denier so the message comes from “the system.”

4. **Process delay:** Delay time between service execution asks how often you want this to run. We recommend changing-the setting to 10 minutes.

5. **Number of days in advance to consider event requests:** How

far out do you want CommunityWFM to look for requests? **System default is 90 days** (CommunityWFM will only consider requests for dates that occur within the next 90 days), and the maximum is 365 days. If planning to do vacation requests far in advance, consider setting this to 365 days. If an agent makes a request for a date that is outside



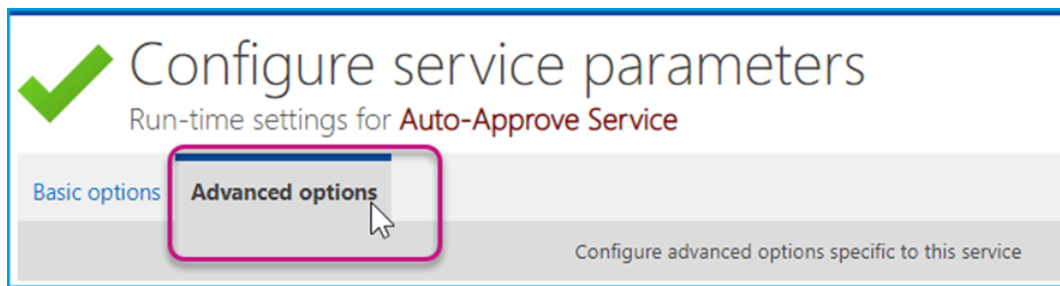


this window, the request will remain in a pending state until it is manually approved or denied by an administrator, or until enough time passes that it is within the specified date range, then the auto-approve service will evaluate the request.

6. **Default approval text:** Add or edit the custom approval message. We already set up the denial message.
7. Click Save.

****The next section is important.****

8. Click the **Advanced options** tab.



9. **Notification settings**

- **Include evaluation time stamp:** Do you want to include a time stamp for when CommunityWFM looked at the request? Typically, Yes.
- **Automatically issue a memo:** Do you want the agent to get a memo when the request has been approved or denied? Typically, Yes.

10. **Single-day event permissions**

- If we check the boxes for the days of the week and the request meets the criteria that we set up, then CommunityWFM will approve the request. If the criteria are not met it will deny the request.
- If we do not check the boxes, CommunityWFM will deny requests that do not meet the criteria that we set up with the rules and leave everything else as pending.

11. **Do you want to localize the request times? and What time zone option should Auto-Approve use?** These are hard-coded to always use the requesting person's time zone.

12. **Multi-day event request permissions.** If checked, auto-approve can approve multi-day requests when an agent selects the option in their request.



13. After making selections, click Save.

Configure service parameters
Run-time settings for **Auto-Approve Service**

Basic options | **Advanced options**

Configure advanced options specific to this service

Notification settings

- Include evaluation time stamp in approval or denial notes text **9**
- Automatically issue a memo to the requesting agent upon review

Single-day event permissions
Select the days you want to automatically approve agent requests

- Monday
- Tuesday
- Wednesday **10**
- Thursday
- Friday
- Saturday
- Sunday

What do these checkboxes mean? Each box above represents a day of the week. If the box is **checked**, then the Auto-Approve service will mark any request on that day of the week as approved if it does not fail any of the rules that apply. If the checkbox is **not checked**, then Auto-Approve will leave the event request in a pending state if it does not fail any rule. However, in either case, if an event fails any rule in effect, Auto-Approve will **deny** the event request.

Do you want to localize the request times?
Yes, let me choose what time zone option to use for Auto-Approve. **11**

What time zone option should Auto-Approve use?
Use the requesting person's time zone.

Multi-day event request permissions

- For multi-day time off requests, the auto-approve service has the authority to **Approve** these requests. **12**

Save **13**

More about multi-day requests

The auto-approve service can be set to approve multi-day requests only if all days are valid. When selected, if one day fails, the entire request fails. When the service evaluates a multi-day event with the setting *“Yes, all the dates in the range must be approved together,”* the request is seen as a block / one request in reports and in the auto-approve service. This means that you cannot edit an individual day on the published schedule.

If *“No, some of the dates can be approved and some denied,”* the days are seen in reports and in the auto-approve service as individual days.

Note: If using the waiting list in a calendar partition, the agent must set the request to *Yes, all the dates in the range must be approved together.*

Are you requesting off a portion of a day or a whole day(s)?
All day

Request type
PTO

Start date: 7/3/2023 | End date: 7/7/2023

Should all dates in the date range be approved together?

- Yes, all the dates in the range must be approved together
- Yes, all the dates in the range must be approved together
- No, some of the dates can be approved and some denied

Next



Waitlist

The waitlist option is available to agents with calendar partition rules as their time off rules source. If requesting time off on a day with brownout rules, and there are already requests for the maximum amount of time for that day, agents have the option of adding themselves to a waitlist. If the time becomes available, agents have the option to accept the time off and if necessary, forfeit existing time off requests.

Notes


- Waitlist is not available during bid rounds.
- Waitlist is not available for all types of requests.
- There is no ranking in the waitlist – it's first requested > first granted.
- When selecting to join a waitlist, agents see how many others are in line in front of them.
- If there is one day in a multi-day request that is not available for the waitlist (e.g., a blackout day), the waitlist option is not available.
- To trigger the waitlist option agents must select *Yes, all the dates in the range must be approved together*, even for a single day request.
- When waitlist hours become available, agents receive a memo that waitlist hours are available and will need to go to their Time off worksheet to accept or decline the hours.
 - Agents need to have available accrued hours or be willing to give up future requests to accept the waitlist offer.

Adding a request to the waitlist

When a request fails the validation rules, eligible requests will have an option to *Continue to waitlist*.

Review the rule type and the request. Agents can see here if others are ahead of them in the waitlist queue. To proceed, click *Setup waitlist item*.

Request validation results
Review the results of the runtime validation of your request and then decide if you wish to continue.



Looks like the request will be denied. See the list below for more details. [27]

The following table shows the dates of your request and the time off rule validation results for each date.

Request date	Validation results	Comments
Tuesday, 17 June 2025	Failed	The Date of this event conflicts with a previous Brownout Date established by your organization.
Wednesday, 18 June 2025	Passed	Agent Blackout Date Rule - No rule of this type was in place. Brownout rule - Your request does not violate the brownout rule parameters. Agent Minimum Request Interval Rule - No rule of this type was in place. Accrued hours rule - You have sufficient accrued hours for the request. Agent RAP rule - You are not restricted from making time off requests for this time period. Agent hire date rule - You are not under a hire date restriction for this time period. Calendar partition enforcement rule - Your request is inside a valid and open calendar partition.



Waitlist queue

Review the current available time off and waitlist queue, and decide how you wish to continue.
Please note that if you elect to waitlist this request, it will have a review status of denied while it remains in the waitlist queue.

The results of the waitlist queue report are shown below. [30]

Current available time off

Rule type	Rule application	Event date	Total allowed PTO	Total scheduled PTO	Total PTO balance
Agent Brownout Date Rule	Enterprise Model	Tuesday, 17 Jun 2025	8.00	8.00	0.00

Current waitlist queue

No other people have waitlist queue items that overlap your time off request.

Agents may select whether to go ahead and designate time to forfeit should the waitlist time become available (and can automatically accept the time), or they can defer and make the decision if the time off becomes available.

Waitlist queue

Review the current available time off and waitlist queue, and decide how you wish to continue.
Please note that if you elect to waitlist this request, it will have a review status of denied while it remains in the waitlist queue.

Choose how you want to set up your request in the waitlist queue

Choose how you want to set up your waitlist request --

Choose how you want to set up your waitlist request --

I want to pre-select approved hours of time off to forfeit if these hours become available. If you want to surrender and then you will have the option to change the forfeit hours when you are notified that those hours are available.

I will wait until the hours become available to select my approved hours to forfeit. If you select your hours of approved time off to forfeit after the hours are available, you have nothing more to do now. But, you may have to select hours to forfeit before you can accept the waitlisted hours.

Please select how you want to set up your waitlist queue request.

If choosing to wait, agents may proceed to *Save to queue*.

Waitlist queue

Review the current available time off and waitlist queue, and decide how you wish to continue.
Please note that if you elect to waitlist this request, it will have a review status of denied while it remains in the waitlist queue.

Choose how you want to set up your request in the waitlist queue

I will wait until the hours become available to select my approved hours to forfeit.

What does this mean?

If you pre-select your hours of approved time off to forfeit, you will choose what upcoming time off you want to surrender and then you will have the option to change the forfeit hours when you are notified that those hours are available.

If you select your hours of approved time off to forfeit after the hours are available, you have nothing more to do now. But, you may have to select hours to forfeit before you can accept the waitlisted hours.

Select forfeit hours after the hours become available

Good news!
You don't need to do anything more. If you want to save this request to the waitlist queue, then click the "Save to queue" button below.



If choosing to preselect hours, the list shows available hours with the option to make selections by checking one or more boxes. Doing this allows automatically accepting the waitlist time if it becomes available.

Waitlist queue

Review the current available time off and waitlist queue, and decide how you wish to continue.
Please note that if you elect to waitlist this request, it will have a review status of denied while it remains in the waitlist queue.

Choose how you want to set up your request in the waitlist queue

I want to pre-select approved hours of time off to forfeit if these hours become available. ▼

What does this mean?
If you pre-select your hours of approved time off to forfeit, you will choose what upcoming time off you want to surrender and then you will have the option to change the forfeit hours when you are notified that those hours are available.
If you select your hours of approved time off to forfeit after the hours are available, you have nothing more to do now. But, you **may** have to select hours to forfeit before you can accept the waitlisted hours.

ESTIMATED DURATION OF REQUEST
8.00
DURATION OF FORFEIT SELECTIONS
8.00


Request date from	Request date through	Request type	Total hours	Review status	
<input checked="" type="checkbox"/>	17 Jun 2025	17 Jun 2025	PTO	8.00	Approved

Back Save to queue

After saving to the queue, review the list and click *Finish*.

Waitlisted time off request results

You have successfully saved a time off request to the waitlist queue.



The following table shows the resulting scheduled events that will now be reviewed by your supervisor team.

Event start	Event end	Duration (in hours)	Event type
Tuesday, 17 Jun 2025 12:00 am	Wednesday, 18 Jun 2025 12:00 am	8.00	PTO

Finish

On the Pending and Upcoming requested time off module the waitlist request will have a Review status of *Denied* and a Waitlist status of *Waitlisted*.

Pending & Upcoming requested time off						
This list shows you the pending and upcoming scheduled time off hours.						
Start time	End time	Request date from	Request date through	Request type	PTO classification	Total hours
12:00 am	08:00 am	17 Jun 2025	17 Jun 2025	PTO	Vacation	8.00
N/A	N/A	17 Jun 2025	17 Jun 2025	PTO	Vacation	8.00

Review status	Waitlist status
Approved	Not waitlisted
Denied	Waitlisted

Clicking the waitlist icon will launch the details of the request, allowing an agent to remove it from the waitlist queue or change the selected hours they wish to forfeit (if selected).



Requesting planned time off vs recurring time off event

The *Request a recurring time off event* form is intended for long term recurring events such as a leave of absence, family leave, military service, etc. While it can be used for any event where you need to specify a time of day or specific non-consecutive days, agents will not see the likelihood of having their request approved prior to submitting the request (i.e., if it will fail any auto-approve rules or accrued time off rules).

Troubleshooting

Why isn't a multi-day request approved by the auto-approve service?

In the Auto-approve service parameters (Settings > Application settings > Administrative settings > Services), check the following:

Basic options

- Is the service enabled?
- What is the *Process delay* time? Has that amount of time passed?
- What is the *Number of days in advance to consider event requests*? Does the event fall within the time frame?

Advanced options

1. Are the requested days of the week checked in the *Single-day event permissions* (if the event is requested as *No, some of the dates may be approved and some denied*)?
2. If the event was requested with *Yes, all the dates in the range must be approved together*, the multi-day event request permissions must be checked to grant the auto-approve service the authority to grant multi-day events.

Configure service parameters
Run-time settings for **Auto-Approve Service**

Basic options | **Advanced options**

Configure advanced options specific to this service

Notification settings

- Include evaluation time stamp in approval or denial notes text
- Automatically issue a memo to the requesting agent upon review

Single-day event permissions

Select the days you want to automatically approve agent requests

- Monday
- Tuesday
- Wednesday 1
- Thursday
- Friday
- Saturday
- Sunday

What do these checkboxes mean? Each box above represents a day of the week. If the box is checked, then the Auto-Approve service will mark any request on that day of the week as approved if it does not fail any of the rules that apply. If the checkbox is not checked, then Auto-Approve will leave the event request in a pending state if it does not fail any rule. However, in either case, if an event fails any rule in effect, Auto-Approve will deny the event request.

Do you want to localize the request times?

No, consider the times as in prior versions of Community.

What time zone option should Auto-Approve use?

Use corporate time zone.

Multi-day event request permissions

- For multi-day time off requests, the auto-approve service has the authority to **Approve** these requests. 2



Why does the event start at midnight on the agent’s schedule?

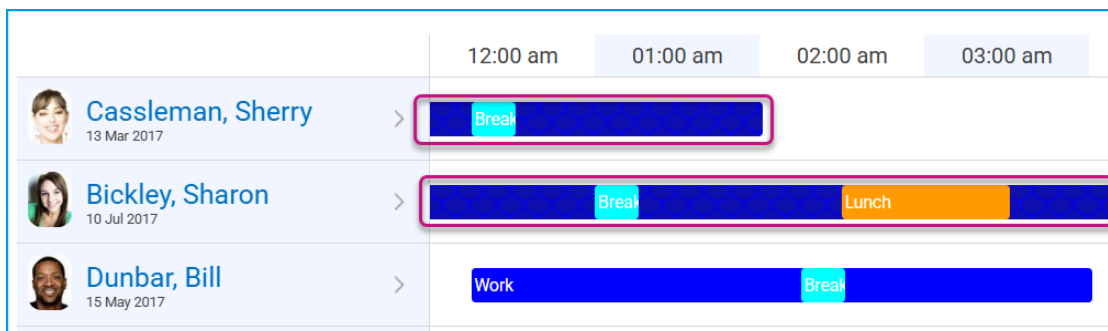
If the event type does not have designated hours (in the event type properties, check the box *Set a default event start and end time*), events added to the schedule will follow the center hours designated in the Global Settings and Preferences. If the center is open 24-hours (i.e., anytime | anytime), full-day planned time off events will begin at midnight.

How does WFM decide the duration of an all-day PTO event?

All day events have the duration of the Default hours for FTE as designated in Settings > Application settings > Global settings & preferences

Why can’t I edit an event on a schedule?

If the Auto-approve service is set to include multi-day event request permissions, and the agent answers the question “should all days be approved together?” as Yes, you will not be able to edit the time of the event on the published schedule by clicking and dragging, or right-click | edit. You can only edit the type of PTO, or you can delete the event. These events have a dragon-scale pattern on the timeline.





Can I apply accrued hours rules without using PTO calendar policies or partitions?

Yes, accruals may be generated within WFM or imported and legacy autoapprove rules enabled to check for accrued hours at the time of a request. To apply accrued hours rules, create a PTO classification that includes events that may be checked against accrued hours prior to approval.

How should an agent request a multi-day event that includes a weekend when our center is closed?

For example, a lucky agent has two weeks off to go on a cruise.

The request should be split into separate requests, and the requested days should only include the days when the center is open.

Alternatively, the agent could use the *Request recurring time off event* form and select a recurrence pattern that does not include weekends.

Recurring time off event
Provide the following details to complete your request.

Request type
PTO

Start date
7/3/2023

End date
7/14/2023

Start time
7 : 00 : AM

End time
3 : 00 : PM

What recurrence pattern should apply to this request?
This event occurs only on selected days of the week

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Comments
Cruising!

Save