



All About Auto-approve

Webinar handout
Version: June 15, 2023



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

Rules

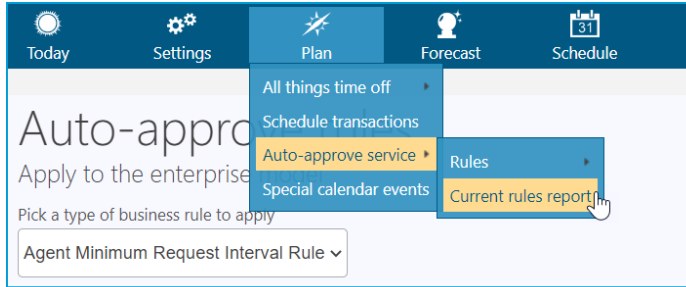
There are three rule types:

1. **Agent Blackout Date Rule:** tells CommunityWFM which days to automatically deny and no one will get time off 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 rules for each day of the week and have different rules for each Activity.
 - Partial day or fractal day approval is only available in a calendar partition.
 - Brownout rules may be associated with a waiting list when using calendar partition rules.
3. **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	Site 2 - Nashville, TN	Sunday, January 01 2023	Sunday, December 31 2023	Account, Service
Agent Minimum Request Interval Rule	Customer Program Service	Sunday, January 01 2023	Sunday, December 31 2023	Account, Service
Agent Brownout Date Rule	Site 1 - Dallas, TX	Wednesday, March 01 2023	Friday, March 31 2023	Account, Service
Agent Blackout Date Rule	Customer Program Service	Thursday, March 30 2023	Thursday, March 30 2023	Account, Service

Creating each rule type

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

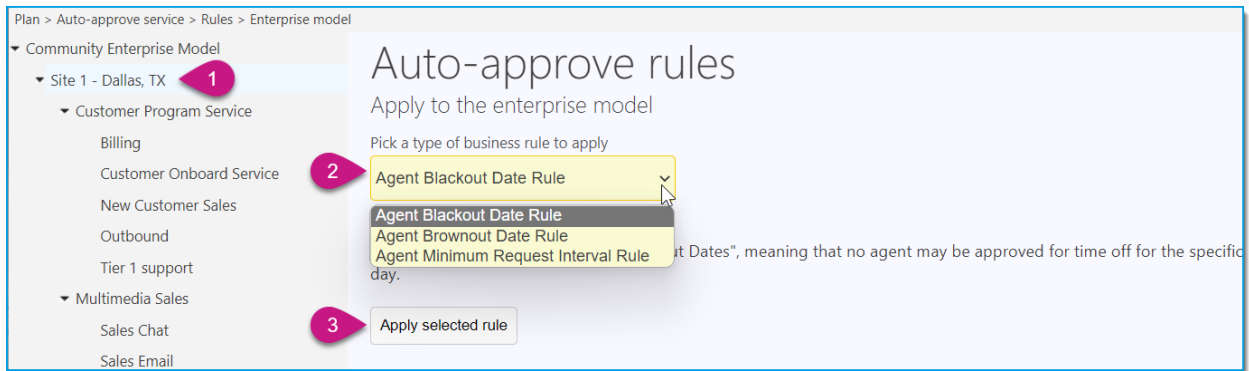
This is where you apply rules by Activity, supervisor, or for the entire center.

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.

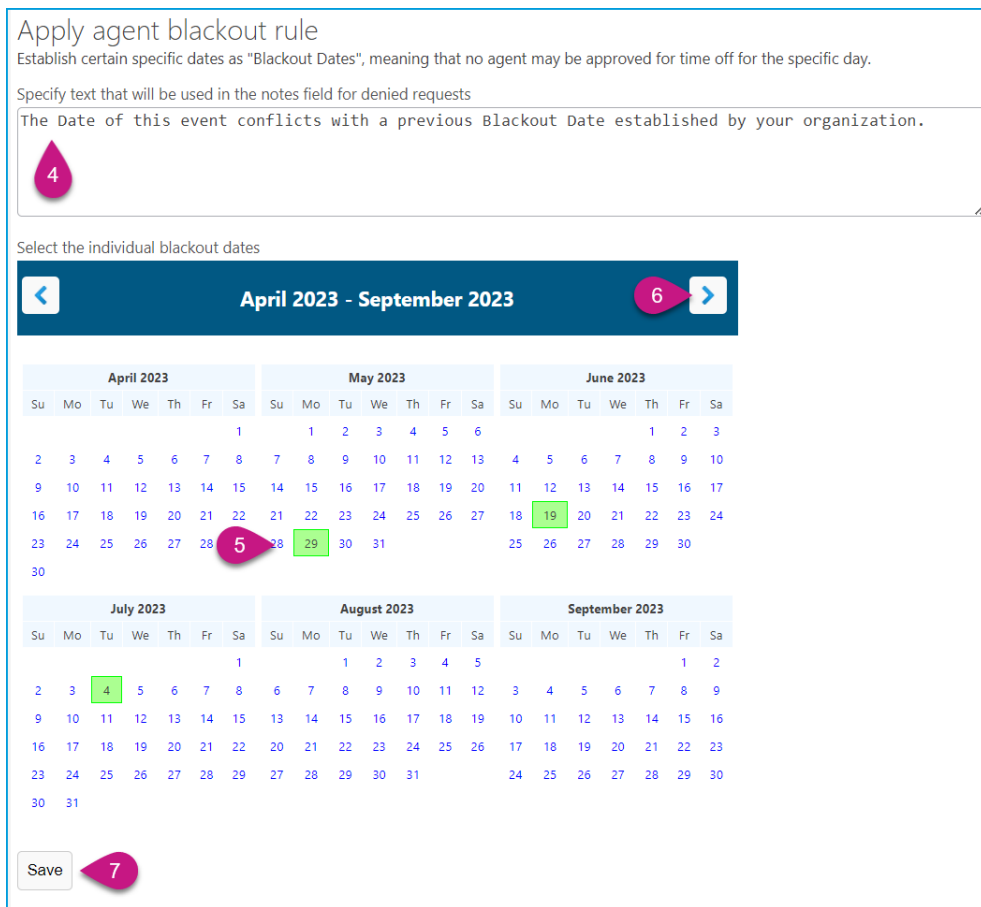


4. Edit or add your custom denial message.

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*.



Apply agent blackout rule

Establish certain specific dates as "Blackout Dates", meaning that no agent may be approved for time off for the specific day.

Specify text that will be used in the notes field for denied requests

The Date of this event conflicts with a previous Blackout Date established by your organization.

Select the individual blackout dates

April 2023 - September 2023

April 2023							May 2023							June 2023									
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa			
						1	1	2	3	4	5	6							1	2	3		
2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10			
9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17			
16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24			
23	24	25	26	27	28	29	28	29	30	31	25	26	27	28	29	30							
						30																	
July 2023							August 2023							September 2023									
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa			
						1	1	2	3	4	5						1	2					
2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9			
9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16			
16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23			
23	24	25	26	27	28	29	27	28	29	30	31	24	25	26	27	28	29	30					
						30																	
						31																	

Save

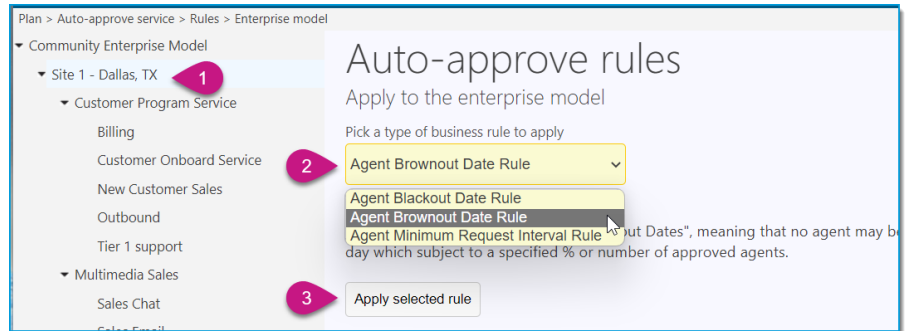
Any request for the days you specified will be automatically denied and agents will see the custom message.



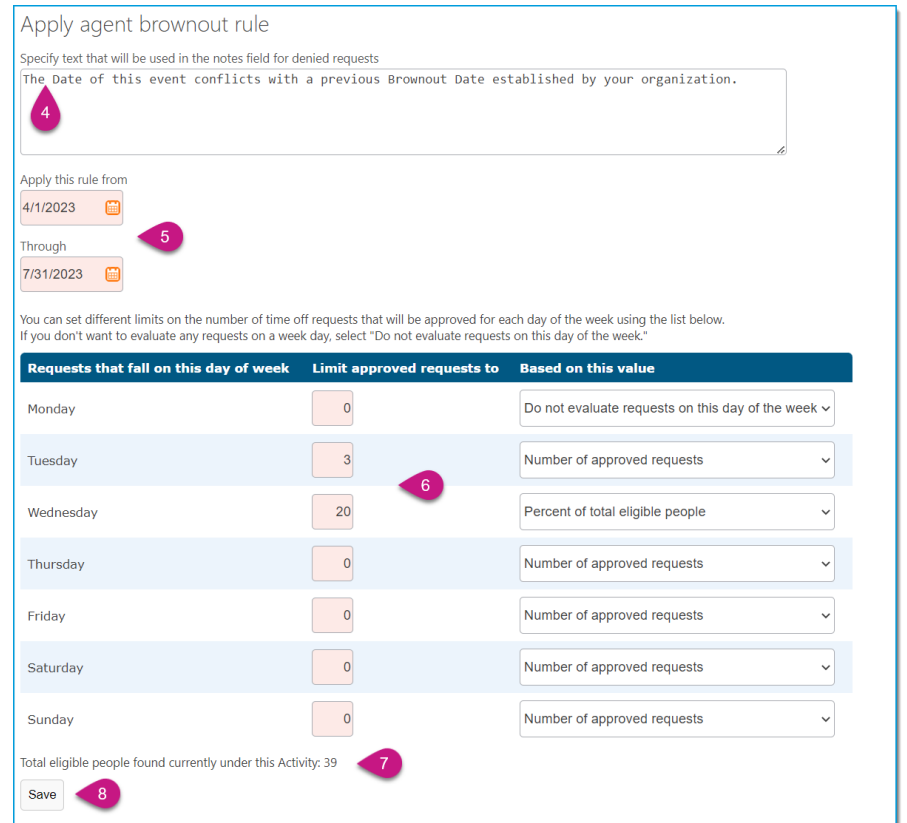
Agent Brownout Date Rule

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.

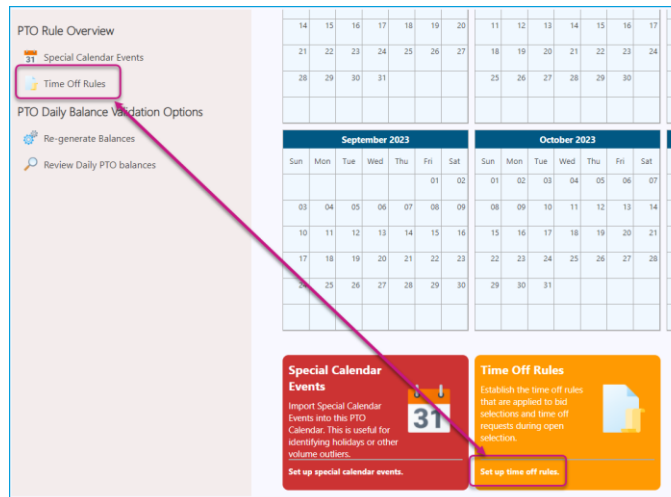


Partial day requests – calendar partition

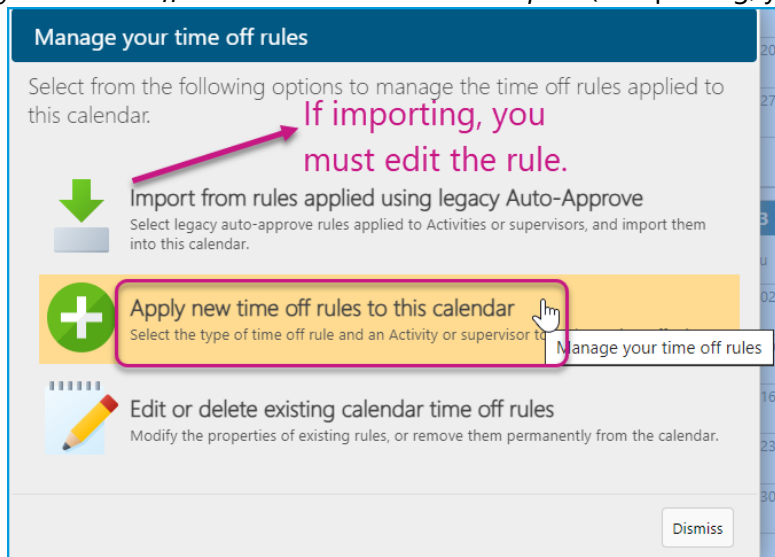
With version 5.0 and when using a calendar partition, CommunityWFM can evaluate partial day requests and take this into account when calculating the number of hours used when people request time off. **This rule must be created or edited within a calendar partition**, and is only available when using calendar partition 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, 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* or *Import* (if importing, you must edit).





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*.

Apply brownout date time off rule

How do you want to apply the time off rule?
 3

Choose participants from this Activity

Specifically **Include** people from this Custom User Group

Specifically **Exclude** people from this Custom User Group

Do you want to further restrict enforcement of this rule?

Custom text for denied requests
 4

Apply rule from
 5

Apply rule through

6

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

Apply brownout date time off rule

You can set up the brownout rule so that each day of the week has individual rule settings.

Monday

Limit to a fixed number of approved hours of time off.	24
Do not restrict requests on this day of week.	
Limit to a fixed number of approved requests.	
Limit by a percentage of total people assigned to the activity or supervisor.	
Limit to a fixed number of approved hours of time off.	16
Limit to a fixed number of approved hours of time off.	

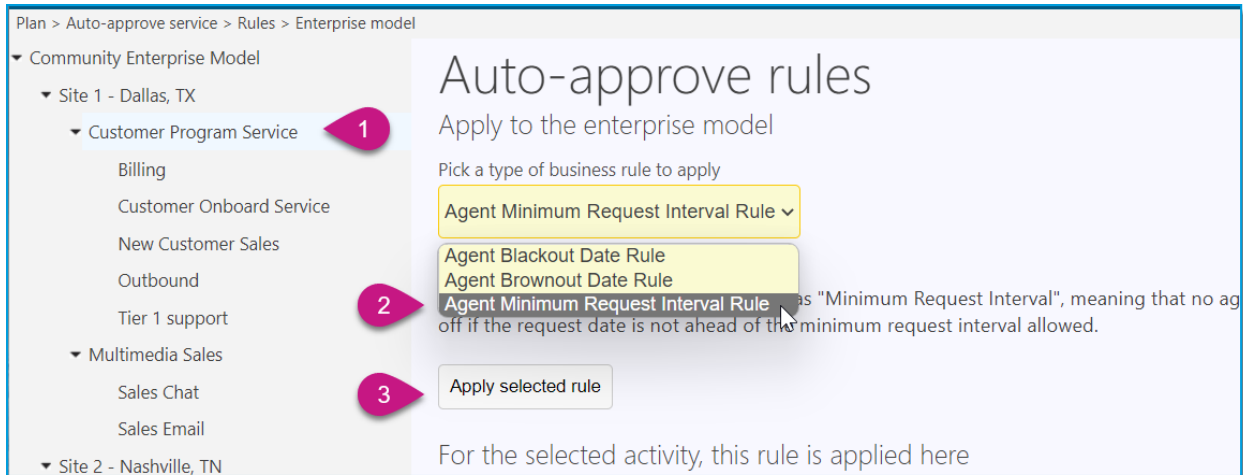
Wednesday

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*.

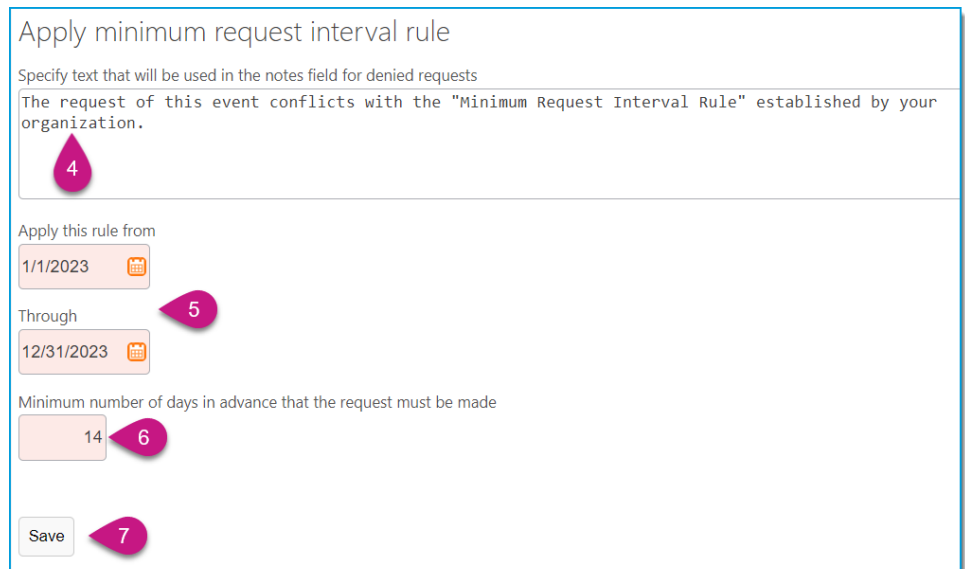


Agent Minimum Request Interval Rule

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*.

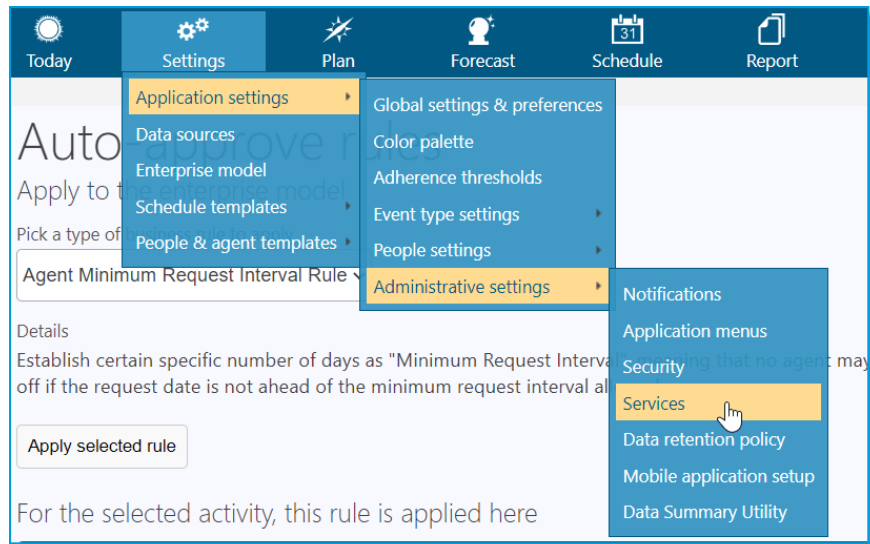


How to enable the auto-approve service.

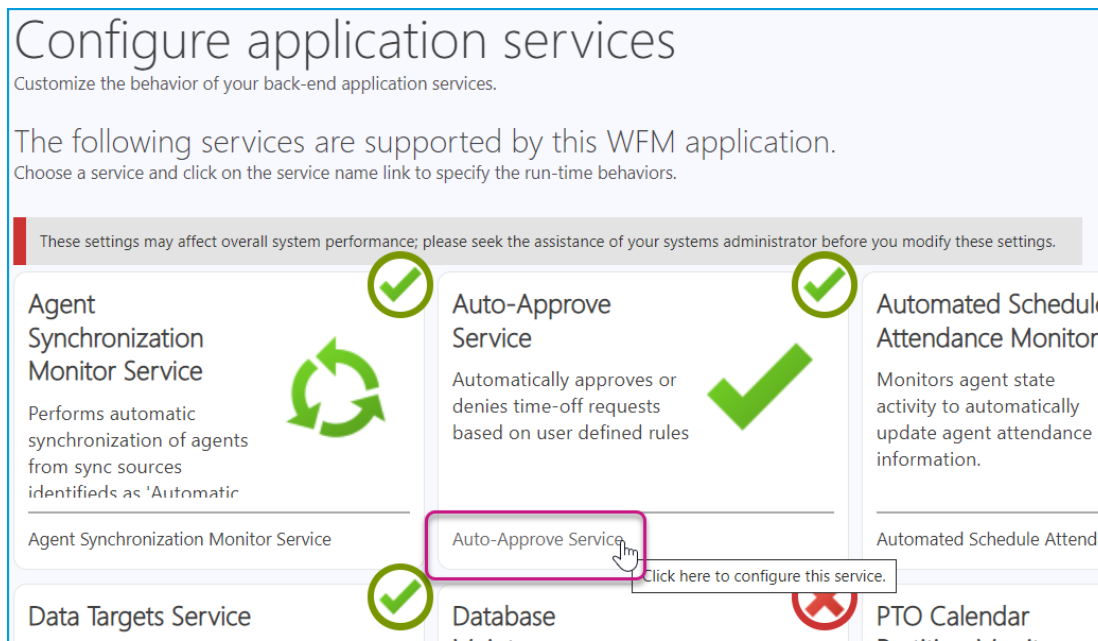
Some may ease into the auto-approve system and have CommunityWFM auto-deny requests to start. As you become more comfortable, you may choose to start using the full auto-approve system.

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.

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 "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 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*.



Configure service parameters

Run-time settings for **Auto-Approve Service**

Basic options

Advanced options

Configure the generic or basic properties of the service

Service enabled?

Impersonated user id

Process delay

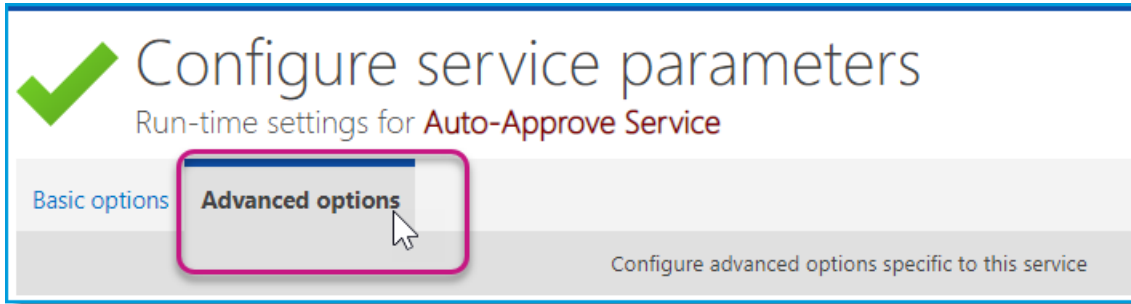
Number of days in advance to consider event requests

Default approval text (appears in notes field on agent event assignment)



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

- Click on the **Advanced options** tab.



- 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? Typically, yes.

- 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.

- Do you want to localize the request times?** Gives the option of using the time zone of the requestor. If you choose the time zone to use, select whether to use the corporate time zone or requestor’s time zone.

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



✓ 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 **10**

Select the days you want to automatically approve agent requests

- Monday
- Tuesday
- Wednesday
- 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 **11**

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

Save

The auto-approve service in CommunityWFM 5.0 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 advanced vacation, the request must be set to Yes.

Agent Request

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



Request 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 or specific days, agents will not see the likelihood of having their request approved. They will not see if it fails any auto-approve rules or accrued time off rules prior to submitting the request.

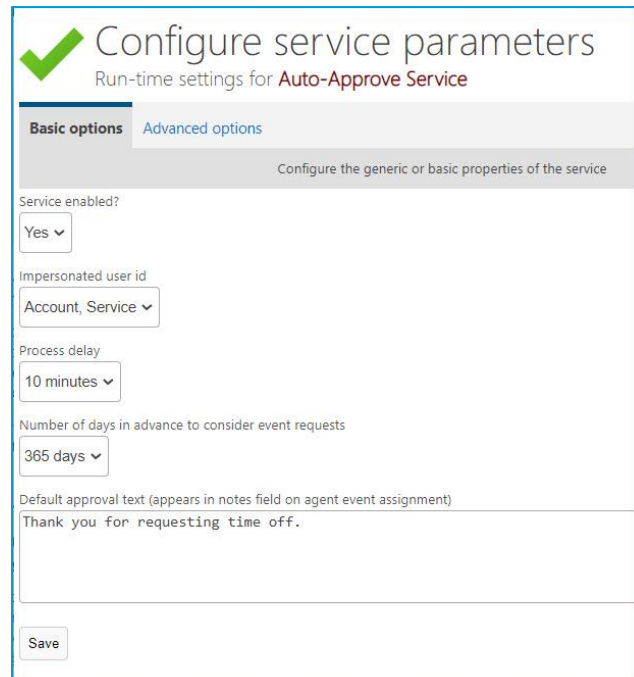
Troubleshooting

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?



✓

Configure service parameters

Run-time settings for **Auto-Approve Service**

Basic options

Advanced options

Configure the generic or basic properties of the service

Service enabled?

Yes ▾

Impersonated user id

Account, Service ▾

Process delay

10 minutes ▾

Number of days in advance to consider event requests

365 days ▾

Default approval text (appears in notes field on agent event assignment)

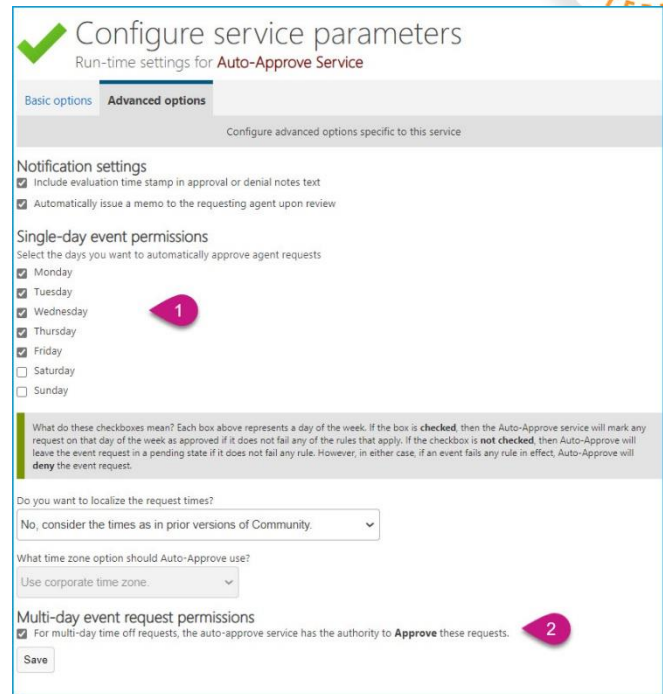
Thank you for requesting time off.

Save



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.



Why does the event start at midnight on the schedule?

If the event type does not have designated hours, 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.

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 edit the type of PTO, and you can delete the event.

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