



Legacy Planned Time Off (PTO)

Webinar handout
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About this document

This document accompanies the CommunityWFM College webinar *Legacy Planned Time Off (PTO)*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

Additional resources are available in the CommunityWFM support portal: [Login or sign up](#).

[All Things Time Off \(ATTO\) – CommunityWFM \(wfmsg.com\)](#)

[Advanced vacation discovery questionnaire](#)

[CommunityWFM Feature Guide: Time Off for Agents](#)

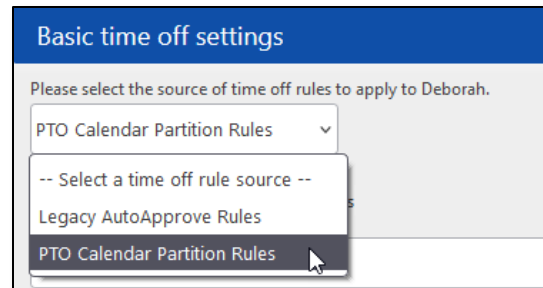
Legacy auto-approve vs. calendar partition rules (advanced)

	5.x Legacy	5.x Advanced
Partial day off		
Fractional slots for time off (2 hr = .25 of available 8 hr slot)		
Multiple days off approved together (or not)		
Recurring event		
Restricted action plan		
Time off rules	Legacy Auto-Approve	Partition Rules
Accrual tracking (and rules)		
Viewable time off rules		
Vacation bidding		
Viewable available time off calendar		
Waitlist		

Time off rules source

Each agent has a time off settings rule in their profile: Settings > People & agent templates > People > Personal Profile > Time off settings for [name] > General time off settings – Configure basic settings > Select the source of time off rules:

- Legacy AutoApprove Rules
- PTO Calendar Partition Rules.



The default setting is Legacy AutoApprove Rules. If an agent's rules source is calendar partition, they must be part of a calendar partition and the partition rules will apply to their time off requests.

Legacy AutoApprove Rules

When an agent's time off rules source is Legacy AutoApprove, the system will look to the Legacy AutoApprove Rules (the validation rules) and the AutoApprove Service when evaluating time off requests.

Validation rules: Plan > All things time off > Time off settings > Time off rule settings > Legacy AutoApprove Rules.

This is where you can enable rules to help manage time off requests.

When a rule is enabled, the validation engine will run when agents make a request and will let agents know whether their request is likely to be approved or denied.

Auto-Approve Service: Unless the Auto-Approve service is turned on (Settings > Application settings > Administrative settings > Services), all submitted requests will go to "pending," even if they fail one or more of the rules (though if a request fails a rule, the agent sees a message that the request will likely not be approved).

Validation rules setup

Click the pencil icon to configure each rule.

Plan > All things time off > Time off settings > Time off rule settings

Customize timeoff rules

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

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

For each validation rule there are two settings:

- 1. Enforce this time off rule?** If Yes, this enforces the rule in general and makes it available when validating a time off request.
- 2. Validate this rule when people are making requests?** If Yes, the rule will run when an agent makes a request and deny the request if it fails the rule. Agents can still save and submit the request and it will be listed as pending. **Note:** The validation does not run in real-time with the *Recurring time off event* request form, but the rules will still apply.

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. (Selected)

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

No, do not enforce this time off rule for the selected source.

Save Cancel

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. (Selected)

Validate this rule when people are making requests?

Yes, include this rule in people's runtime request validation. (Selected)

Yes, include this rule in people's runtime request validation.

No, do not include this rule in people's runtime request validation.

Save Cancel

The accrued hours rule is not enabled by default for legacy PTO. All the other validation rules are enabled by default.

The third option, *Enable waitlisting on failure for the rule?* is not available for legacy rules.

Note: The validation does not run in real-time with the *Recurring time off event* request form, but the rules will still apply.

Agent accrued hours rule

Ensures that the agent has sufficient accrued hours for the requested date(s).

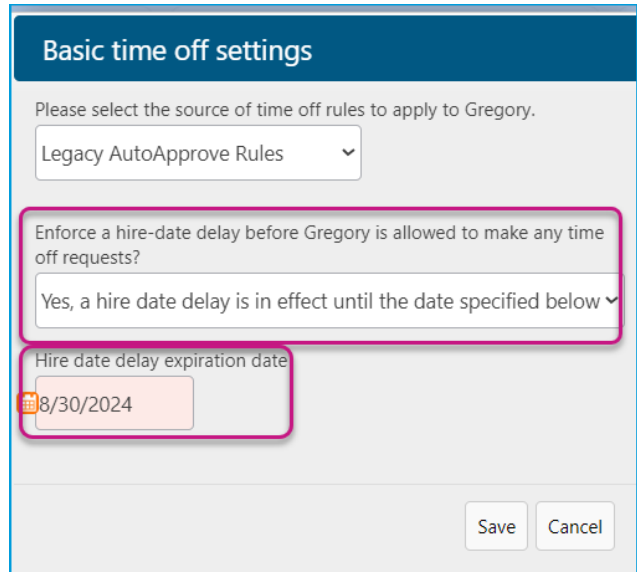
Hire date eligibility delay

Allows designating a time frame when new hires cannot request time off.

While enabled here, this rule is configured in an agent's profile > Basic time off settings.

Select *Yes, a hire date delay is in effect until the date specified below*, then select the expiration date for the hire date delay.

Agent Profile



Restricted action plan

Ensures that the agent is not on a restricted action plan that includes time off requests. The rule is configured in an agent's profile > Restricted action plans.

For more information, visit the [Restricted Action Plan \(RAP\)](#) article in our support portal.

Auto-Approve rules setup

Additional set up is required for the blackout, brownout, and minimum request interval rules to set the parameters for each rule.

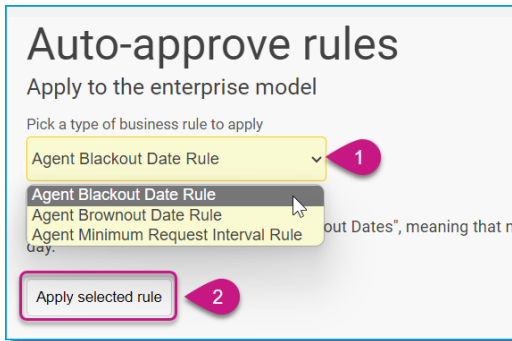
Navigate to Plan > Auto-approve service > Rules > Enterprise model | Supervisor tree.

Blackout date rule

Dates when there will be no auto-approval for requested time off.

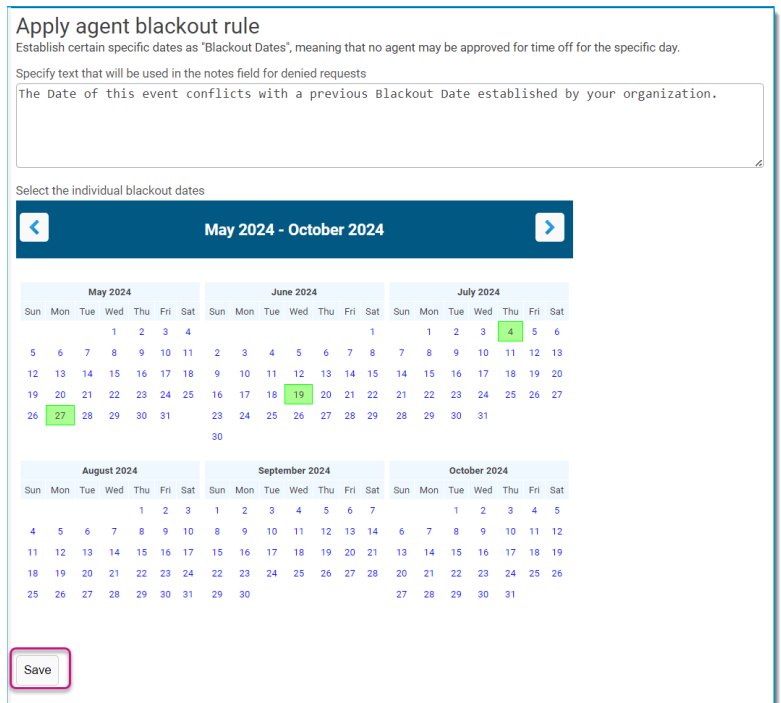
1. Select *Agent Blackout Date Rule* from the drop-down menu

2. Click *Apply selected rule*.



In the calendar, click the blackout dates.
Selected dates will be green.

After making all selections, click *Save*.



A table displays a list of blackout dates.

For the selected activity, this rule is applied here

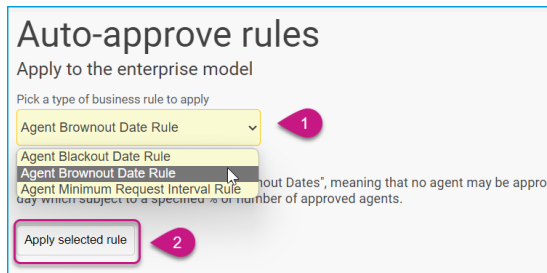
Effective from	Effective through	Memo text when denied	
Mon, 27 May 2024	Mon, 27 May 2024	The Date of this event conflicts with a previous Blackout Date established by your organization.	Delete
Wed, 19 Jun 2024	Wed, 19 Jun 2024	The Date of this event conflicts with a previous Blackout Date established by your organization.	Delete
Thu, 04 Jul 2024	Thu, 04 Jul 2024	The Date of this event conflicts with a previous Blackout Date established by your organization.	Delete

Brownout date rule

Allows designating a certain number (or percentage) of people who can be off on a given day.

Note: with legacy rules, any request—even a partial day request—counts as a full ‘slot’ for the brownout rule.

1. Select *Agent Brownout Date Rule* from the drop-down menu.
2. Click *Apply selected rule*.



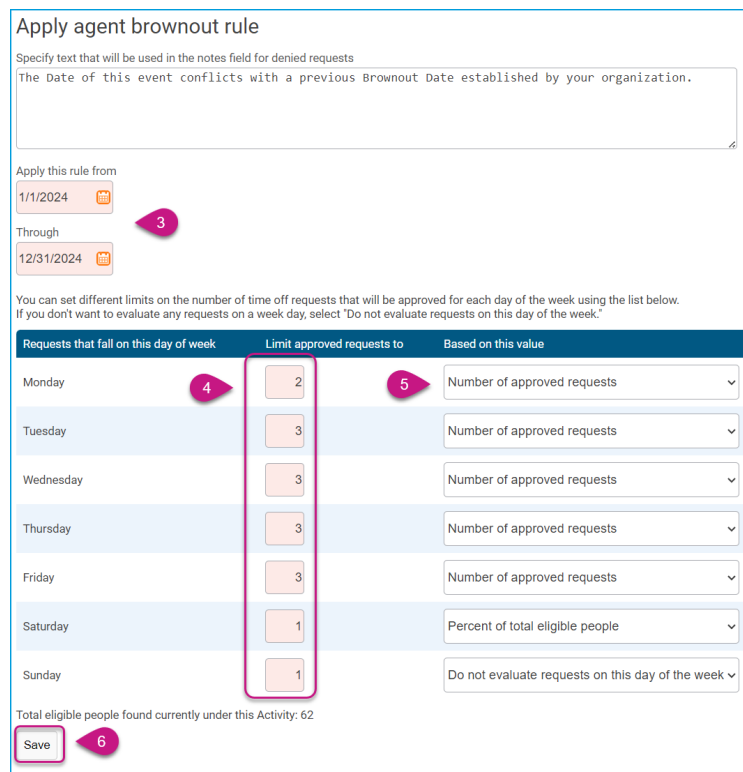
Auto-approve rules
Apply to the enterprise model

Pick a type of business rule to apply

- Agent Brownout Date Rule **1**
- Agent Blackout Date Rule
- Agent Brownout Date Rule
- Agent Minimum Request Interval Rule

Apply selected rule **2**

3. Enter a date range for the rule to run.
4. For each day, enter the total number or percentage of requests to approve.
5. Select whether the value is a number or percentage, or if the service should not evaluate requests on this day (e.g., if the center is closed).
6. After completing all fields click *Save*.



Apply agent brownout rule

Specify text that will be used in the notes field for denied requests
The Date of this event conflicts with a previous Brownout Date established by your organization.

Apply this rule from
1/1/2024 **3**
Through
12/31/2024

You can set different limits on the number of time off requests that will be approved for each day of the week using the list below.
If you don't want to evaluate any requests on a week day, select "Do not evaluate requests on this day of the week."

Requests that fall on this day of week	Limit approved requests to	Based on this value
Monday 4	2 5	Number of approved requests
Tuesday	3	Number of approved requests
Wednesday	3	Number of approved requests
Thursday	3	Number of approved requests
Friday	3	Number of approved requests
Saturday	1	Percent of total eligible people
Sunday	1	Do not evaluate requests on this day of the week

Total eligible people found currently under this Activity: 62

Save **6**

Minimum request interval

How far in advance people can request time. Can people request tomorrow off? This rule compares the date of the request with the date of the requested day.

1. Select *Agent Minimum Request Interval Rule* from the drop-down menu
2. Click *Apply selected rule*.

3. Enter the date range for the rule to run
4. Enter the number of days in advance that a request must be made.
5. Click *Save*.

To view a list of all current rules by Enterprise Model or Supervisor, navigate to Plan > AutoApprove Service > Current rules report.

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 Minimum Request Interval Rule	Site 1 - Dallas, TX	Monday, January 01 2024	Tuesday, December 31 2024	Account, Service
Agent Brownout Date Rule	Site 1 - Dallas, TX	Monday, January 01 2024	Tuesday, December 31 2024	Account, Service
Agent Blackout Date Rule	Site 1 - Dallas, TX	Monday, May 27 2024	Monday, May 27 2024	Account, Service
Agent Blackout Date Rule	Site 1 - Dallas, TX	Wednesday, June 19 2024	Wednesday, June 19 2024	Account, Service
Agent Blackout Date Rule	Site 1 - Dallas, TX	Thursday, July 04 2024	Thursday, July 04 2024	Account, Service

Finally, if you would like CommunityWFM to approve time off requests that meet the rules, you must enable the Auto-Approve Service (Settings > Application settings > Administrative settings > Services).

Accruals

We want this process to be deliberate and careful so there are lots of places along the way to validate your entries. This is because of the sensitive nature of the data we're dealing with – peoples' time off.

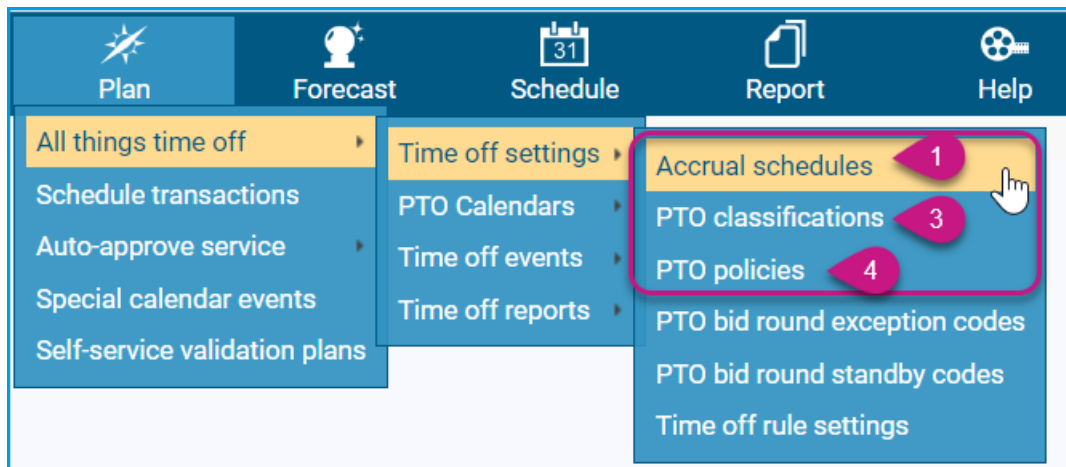
Will CommunityWFM validate accrued hours when evaluating a time off request? If so, you will need to build accrual schedules (or plan to upload hours via Excel), create classifications (buckets that include one or more event types), and create and place people into PTO policies (which establish accrual rules for the classifications).

A few notes:

- An event may be included in only one classification.
- A classification may be included in more than one policy.
- To validate accruals when evaluating a time off request, an agent must be included in a policy.
- An employee may be included in only one policy.

Preparation overview

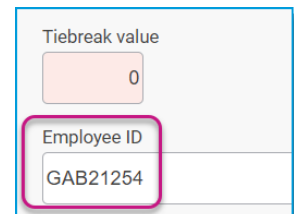
1. Set up accrual schedule(s). Plan > All things time off > Time off settings > Accrual schedules.
2. Set up events including shrinkage type (discretionary, non-discretionary, not shrinkage). Settings > Application settings > Event type settings > Event types.
3. Set up classifications and add events (an event can belong to only one classification). Plan > All things time off > Time off settings > PTO classifications.
4. Set up policies for the accrual source, whether negative balance allowed, rollover settings, new hire delay. Plan > All things time off > Time off settings > PTO policies.
5. Add people to policies (people can belong to only one policy).



6. Configure any special calendar events (when the contact center is closed). Plan > Special calendar events.
7. Configure brownout, blackout, and minimum request interval rules. Plan > Auto-approve service > Rules > Enterprise model | Supervisor tree.

Employee ID

If you plan to import time off accruals from an external source such as an Excel spreadsheet, there must be non-duplicated content in the Employee ID field, i.e., an identifier unique to each agent. This field must match **exactly** the data in the external source, including leading zeros. Settings > People & agent templates > People | Personal profile > Basic properties for [agent name].



The screenshot shows a form with two input fields:

- Tiebreak value:
- Employee ID:

	A	B	C	D
1	Employee ID	First Name	Last Name	Classification Name
2	GAB21254	Greg	Badgett	PTO
3				

Working accrual calendars

The working accrual calendar works in a similar way to working schedules: A way to test fit the PTO accruals. The working accrual calendar is not visible to agents and the hours are not applied to agents until you publish the working accrual calendar.

Set up as many working accrual calendars as you need. You can create a working accrual calendar at the Enterprise level or a site level, but not at a folder or activity level.

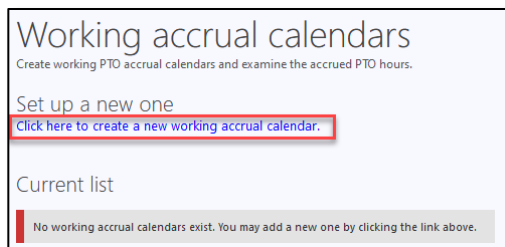
After publishing, the link between the working and published calendar is broken; you can't publish it again. After reaching a time when you won't need to review the working files, you can safely delete them.

Reminder: Once published, the working accrual calendar cannot be unpublished.

Setup

Plan > All things time off > PTO Calendars > Working accrual calendars

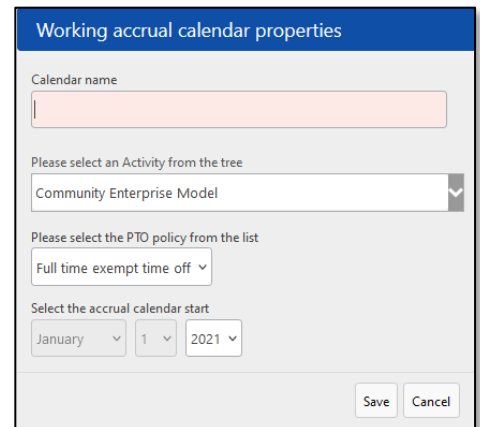
Click here to create a new working accrual calendar.



Configure the basic properties, security, and custom notifications for this working accrual calendar.

Basic calendar settings

1. **Calendar name:** required.
2. **Please select an Activity from the tree:** Enterprise level or site level.
3. **Please select the PTO policy from the list:** Select from the list of previously created policies.
4. **Select the accrual calendar start:** Select a year. This date determines when accruals begin and when they are applied.



The *PTO accrual calendar start date* (month and day) is set at the Enterprise Model level (Settings > Enterprise model > Enterprise basic properties > PTO accrual calendar start month and day), but you can select a different year at the calendar level. Default is January 1.

Click *Save* to complete the basic set up.

Accrual tables

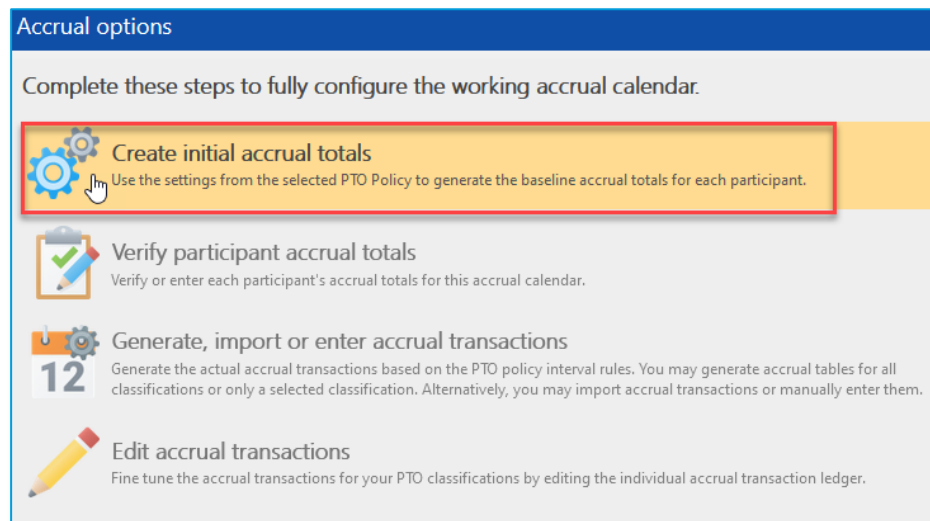
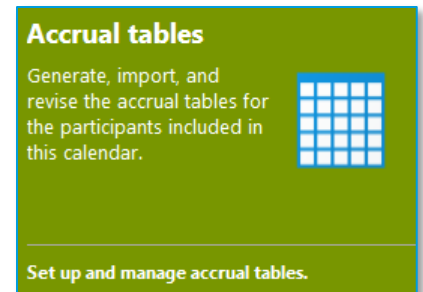
This is where you generate, import, or revise the accrual tables for the participants included in this accrual calendar.

a. Create initial accrual totals

The purpose of this step is to create the baseline number of hours for each person in the calendar. The settings from the selected PTO policy generate the baseline accrual totals for each participant attached to the policy.

If using Excel import or other external source for accruals: You will still create initial accrual totals and verify participant accrual totals of 0 hours. This will create the placeholder in the system to populate with your imported hours.





Click *Create initial accrual totals*.



In the pop-up window, click *Generate baseline totals*. After generating, click *Dismiss*.

Accrual options

Complete these steps to fully configure the working accrual calendar.

- 
Create initial accrual totals
 Use the settings from the selected PTO Policy to generate the baseline accrual totals for each participant.
- 
Verify participant accrual totals
 Verify or enter each participant's accrual totals for this accrual calendar.
- 
Generate, import or enter accrual transactions
 Generate the actual accrual transactions based on the PTO policy interval rules. You may generate accrual tables for all classifications or only a selected classification. Alternatively, you may import accrual transactions or manually enter them.
- 
Edit accrual transactions
 Fine tune the accrual transactions for your PTO classifications by editing the individual accrual transaction ledger.

Generate baseline accrual totals

To generate the baseline accruals for this calendar, press the "Generate baseline totals" button below. Note that this will ONLY create the baseline totals for each participant. You will then be able to verify the accrual totals for each participant prior to generating the individual accrual transactions in the next step.

Note that this process may take a few minutes depending on how many participants are included in this working accrual calendar.


Generate baseline totals
Dismiss

b. Verify participant accrual totals


Verify or enter each participant's accrual totals for this accrual calendar.

To change a person's accrual, click the edit button (pencil), add the new total accrued hours for the calendar period, select whether to automatically verify the total, add a comment (required), and *Save*.

Edit accrual totals



96.00
Accrued hours
Specify a fixed number of PTO hours



This accrual type supports edits to the accrual totals, but be aware that changes to the fixed total hours of accrued PTO represent an override and are audited as such. Also note that only the system parameter 'Maximum allowed total accrued PTO hours' is enforced for the fixed override accrued hours.

New total accrued hours for this calendar period

96.00

Automatically verify this new total for the selected PTO classification?

Yes, automatically verify this total





Revision comments

Enter comments for this revision

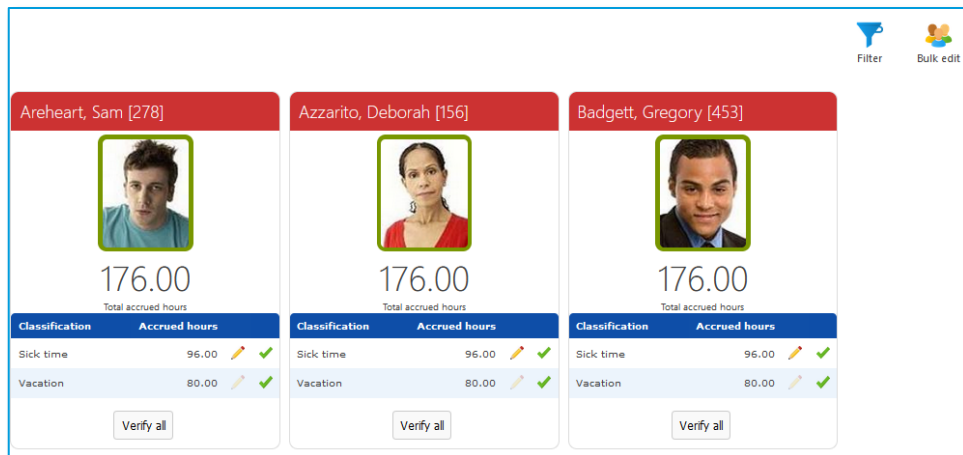
Save
Dismiss

Note: If you are using system generated accruals, the edit button will not be available, but you can add/remove hours for an individual agent by doing a manual adjustment.

You must verify **each** classification if there is more than one for the agent. If one is verified

Classification	Accrued hours		
Sick time	96.00		
Vacation	80.00		

System generated - edit not available

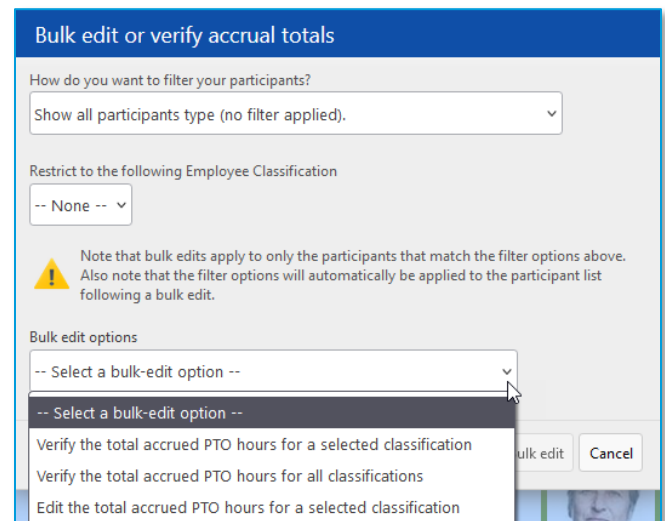


and one not verified, the banner will be yellow. If none are verified, the banner is red. When all are verified, the banner is green.

To verify all classifications for all agents using the *Bulk edit* tool:

- Verify the total accrued PTO hours for a selected classification (then pick the classification),
- Verify the total accrued PTO accrual hours for all classifications, or
- Edit the total accrued PTO hours for a selected classification.

If you have verified hours for an individual agent, that agent will not be included in the bulk edit (as they are already verified).



After verifying the hours, close the browser tab.

Reminders:


- All agents must have their hours verified before you can go to the next step of generating accrual transactions.
- After verifying the accruals, you can't return to the verification section.

c. Generate, import, or enter accrual transactions

This determines how often and when participants receive their allocation of hours (annually, monthly, or weekly), based on the PTO policy interval rules. You may generate accrual transactions for all classifications or only a selected classification. If there is a rounding issue, the over or under will be allocated in the first accrual transaction of the year.


Accrual options

Complete these steps to fully configure the working accrual calendar.




Create initial accrual totals

Use the settings from the selected PTO Policy to generate the baseline accrual totals for each participant.




Verify participant accrual totals

Verify or enter each participant's accrual totals for this accrual calendar.



Generate, import or enter accrual transactions

Generate the actual accrual transactions based on the PTO policy interval rules. You may generate accrual tables for all classifications or only a selected classification. Alternatively, you may import accrual transactions or manually enter them.



Edit accrual transactions

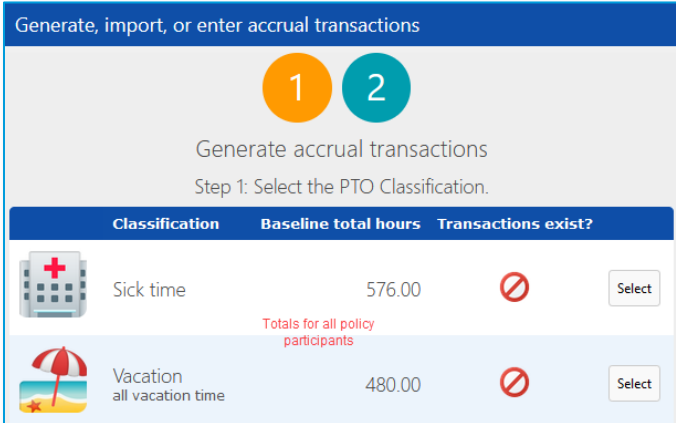
Fine tune the accrual transactions for your PTO classifications by editing the individual accrual transaction ledger.

Dismiss

For each person in the participant list who is part of the policy, this is the actual transaction to give the person their allotted hours.

For each classification click *Select*. You can only do one classification at a time. You may import accrual transactions from Excel or use the accrual rate from the policy in CommunityWFM.

If you have previously generated or imported accrual transactions for a classification, repeating this step will remove all existing transactions.







Generate, import, or enter accrual transactions

1 2

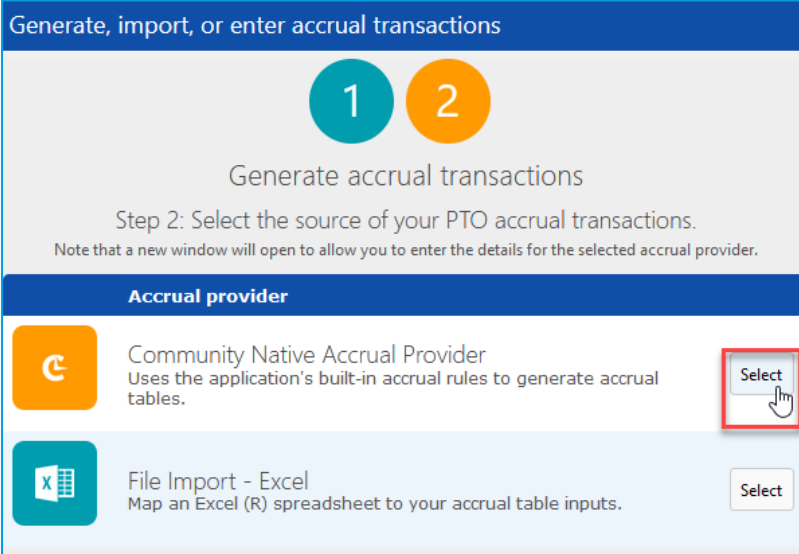
Generate accrual transactions

Step 1: Select the PTO Classification.

Classification	Baseline total hours	Transactions exist?	
 Sick time	576.00		<input type="button" value="Select"/>
<i>Totals for all policy participants</i>			
 Vacation all vacation time	480.00		<input type="button" value="Select"/>

Community native accrual provider

Click *Select* to use the native accrual provider.





Generate, import, or enter accrual transactions

1 2

Generate accrual transactions

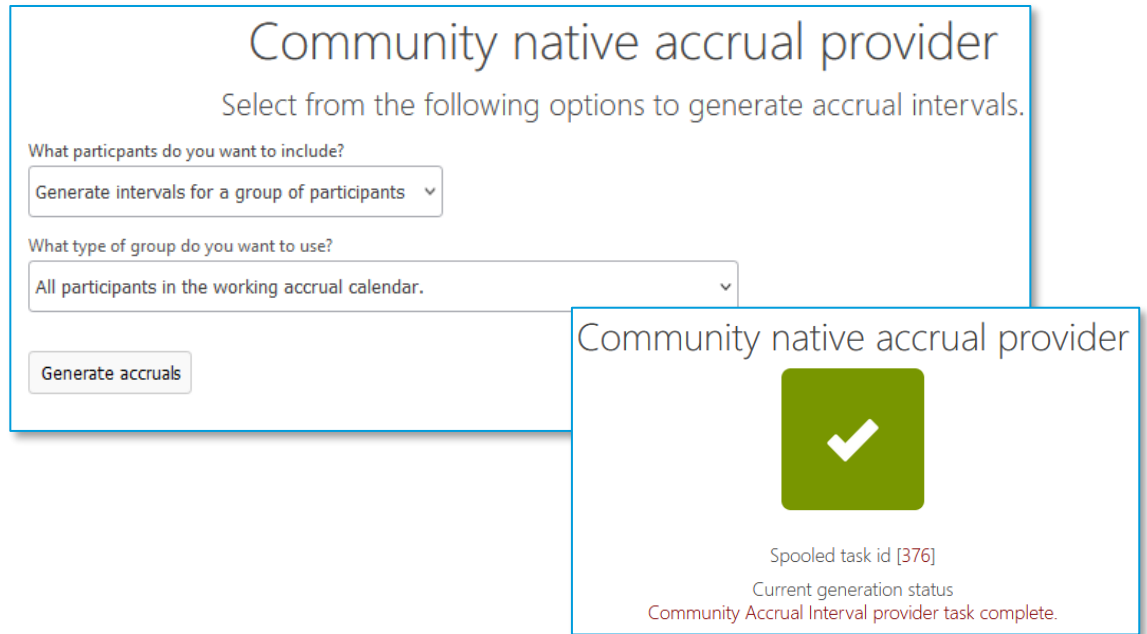
Step 2: Select the source of your PTO accrual transactions.

Note that a new window will open to allow you to enter the details for the selected accrual provider.

Accrual provider		
	Community Native Accrual Provider Uses the application's built-in accrual rules to generate accrual tables.	<input type="button" value="Select"/>
	File Import - Excel Map an Excel (R) spreadsheet to your accrual table inputs.	<input type="button" value="Select"/>

What participants do you want to include? Select a group or select individuals. *Generate intervals for an individual participant* then select the participant(s), or *Generate intervals for a group of participants* (all participants in the working accrual calendar, by Activity or Enterprise Model, by supervisor, or custom user group).

1. Click *Generate accruals*. A green check indicates success.



Community native accrual provider

Select from the following options to generate accrual intervals.

What participants do you want to include?


Generate intervals for a group of participants

What type of group do you want to use?

All participants in the working accrual calendar.

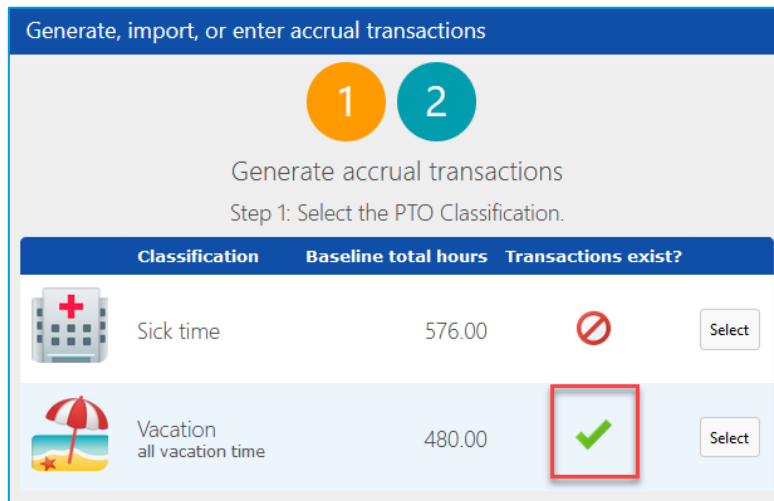
Generate accruals

Community native accrual provider



Spooled task id [376]
Current generation status
Community Accrual Interval provider task complete.

2. When finished, close the pop-up window. A green check mark in the *Transactions exist?* column confirms the transactions.







Generate, import, or enter accrual transactions

1 2

Generate accrual transactions

Step 1: Select the PTO Classification.

Classification	Baseline total hours	Transactions exist?	
 Sick time	576.00		Select
 Vacation all vacation time	480.00		Select

3. Click *Cancel* to return to the Accrual options window.
4. Repeat if needed for any additional classifications.

Excel import of accruals

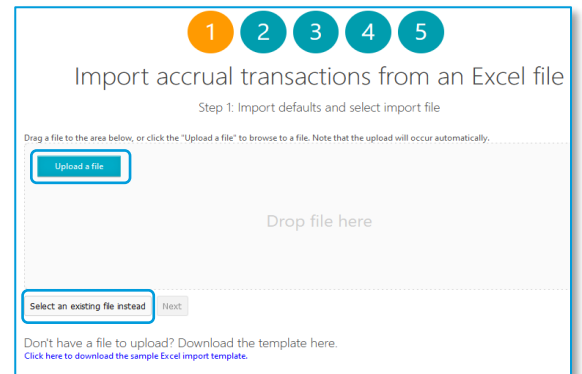
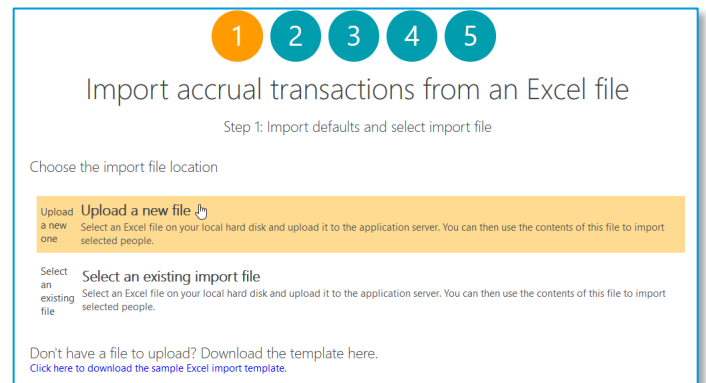
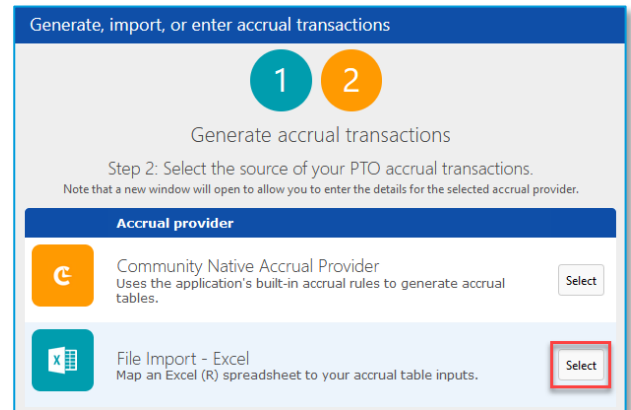
If using Excel import: Click *Select* next to File Import – Excel. **Note:** File must be .xls or .xlsx.

Step 1: Click *Upload a new file*. You may also select from previously uploaded files.

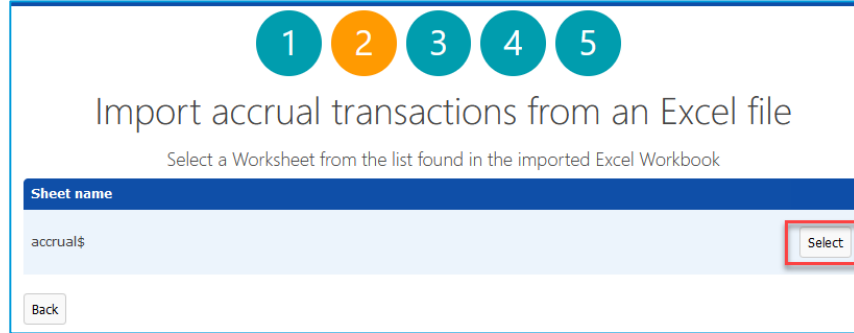
Select *Upload a file* or click and drag the file into the window. **Note:** The file must not be open on your computer during the upload.

If you have already uploaded a file, click *Select an existing file instead* then select your file from the drop-down menu on the next screen.

Click *Next*.



Step 2: Select the *Sheet name* from the list. If you did not rename the worksheet, it will have a name of Sheet1\$. There will be a \$ at the end of the sheet name. CommunityWFM will analyze the columns and data and create the fields.



1 2 3 4 5

Import accrual transactions from an Excel file

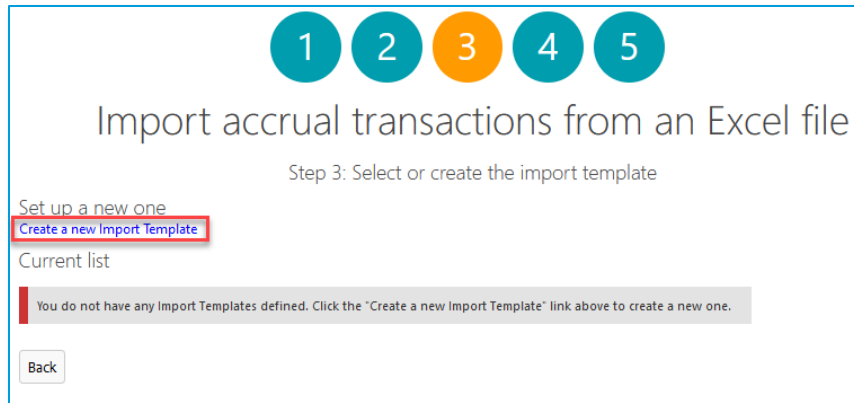
Select a Worksheet from the list found in the imported Excel Workbook

Sheet name
accrual\$

Select

Back

Step 3: Select or *Create a new Import Template*



1 2 3 4 5

Import accrual transactions from an Excel file

Step 3: Select or create the import template

Set up a new one

[Create a new Import Template](#)

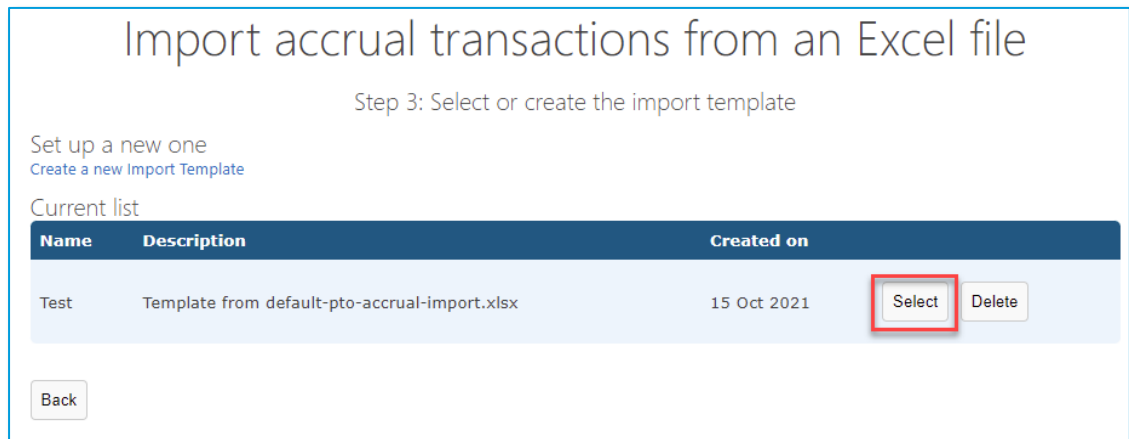
Current list

You do not have any import Templates defined. Click the "Create a new Import Template" link above to create a new one.

Back

Add a template name and verify that the column names match the field names then click OK.

Select the Template.



Step 4: Verify and import. Review the imported data. Green checkmarks indicate agents who will have hours imported. Red Xs indicate agents who will not be imported. Yellow X warnings are agents who have an issue but can still be imported.

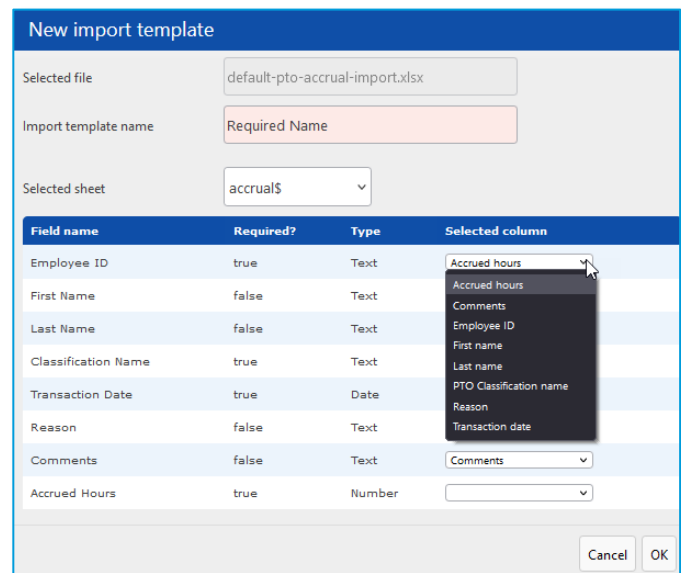
Common reasons for a red X include:

- the agent is not included in the calendar partition
- there was no employee ID
- the employee ID did not match a name
- employee ID field is formatted as number or missing leading zeros
- classification does not match a classification in the policy

Reasons for the yellow warning include (you can still import these):

- Misspelling of the agent's name, or nickname used instead of given name.

Click *Import all Valid* or *Import all Including Warnings*. You cannot import agents with the red X (and the *Import* button is greyed out).



Click *Next*.

1
2
3
4
5

Import accrual transactions from an Excel file

Step 4: Verify and import

Status	Employee ID	First name	Last name	PTO Classification name	Transaction date	Reason	Comments	Accrued hours	
✓	tcislip	Traci	Crislip	Cathi Test	01 Jan 2021	ACCRUAL IMPORT	2021 Accrual	10.00	<input type="button" value="Import"/>
✓	tcislip	Traci	Crislip	Cathi Test	01 Feb 2021	ACCRUAL IMPORT	2021 Accrual	10.00	<input type="button" value="Import"/>
✘	wdunbar	William	Dunbar	Cathi Test	01 Jan 2021	ACCRUAL IMPORT	2021 Accrual	10.00	<input type="button" value="Import"/>
Could not find a participant with the provided first and last name, or the first and last name did not match the provided Employee Id.									
✘	wdunbar	William	Dunbar	Cathi Test	01 Feb 2021	ACCRUAL IMPORT	2021 Accrual	10.00	<input type="button" value="Import"/>
Could not find a participant with the provided first and last name, or the first and last name did not match the provided Employee Id.									
✘	ABD21223	Amanda	Dyer	Vacation	01 Jan 2021	ACCRUAL IMPORT	2021 Accrual	10.00	<input type="button" value="Import"/>
Could not find a PTO classification as part of the selected PTO Policy with the imported name. The imported transaction date does not conform to the boundaries of the PTO policy rules for the selected classification.									
✘	ABD21223	Amanda	Dyer	Vacation	01 Feb 2021	ACCRUAL IMPORT	2021 Accrual	10.00	<input type="button" value="Import"/>
Could not find a PTO classification as part of the selected PTO Policy with the imported name. The imported transaction date does not conform to the boundaries of the PTO policy rules for the selected classification.									

Back
Import all Valid
Import all Including Warnings
Next

Review to confirm the imported data is correct then click *Finish*.






For more details about uploading accruals with Excel, visit our support portal article: [Excel Accrual Import – CommunityWFM \(wfmsg.com\)](https://wfmsg.com/Excel-Accrual-Import).

d. Edit accrual transactions

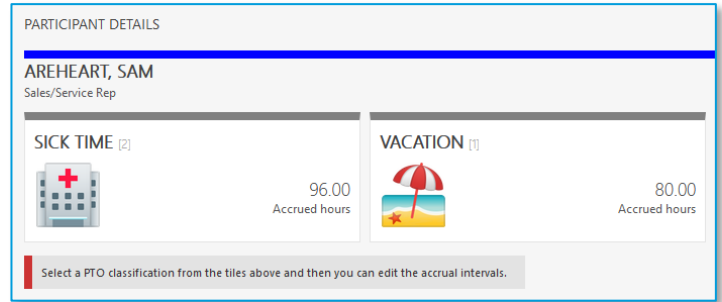
If needed, fine tune the accrual transactions for your PTO classifications by editing the individual transaction ledger. You can't remove a transaction, but you can make an adjustment to make corrections.

Accrual options

Complete these steps to fully configure the working accrual calendar.



- 
Create initial accrual totals
Use the settings from the selected PTO Policy to generate the baseline accrual totals for each participant.
- 
Verify participant accrual totals
Verify or enter each participant's accrual totals for this accrual calendar.
- 
Generate, import or enter accrual transactions
Generate the actual accrual transactions based on the PTO policy interval rules. You may generate accrual tables for all classifications or only a selected classification. Alternatively, you may import accrual transactions or manually enter them.
- 
Edit accrual transactions 
Fine tune the accrual transactions for your PTO classifications by editing the individual accrual transaction ledger.

1. Click the agent's name.
2. Click the Classification tile.
3. Click *Make adjustment*.



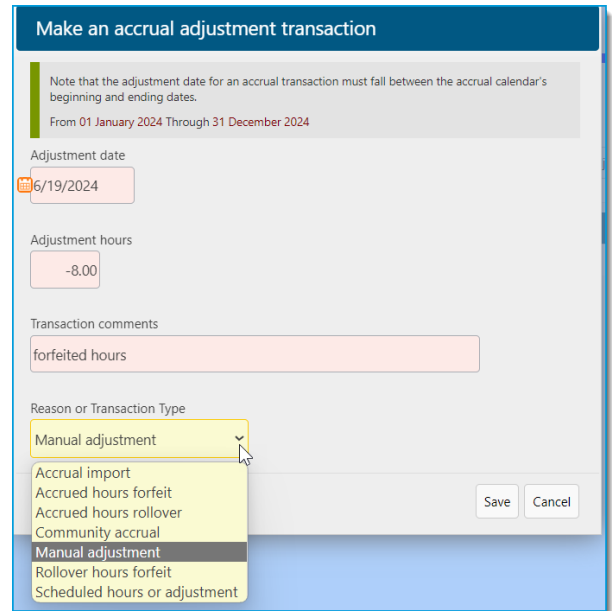
PARTICIPANT DETAILS

AREHEART, SAM
Sales/Service Rep

SICK TIME [2]  96.00 Accrued hours	VACATION [1]  80.00 Accrued hours
---	--

Select a PTO classification from the tiles above and then you can edit the accrual intervals.

4. In the pop-up window, select a date for the manual adjustment transaction. This date must be within the accrual calendar's dates.
5. Enter the number of hours to add or remove. No partial hours allowed. To remove hours, include a minus sign.
6. Enter a comment (reason why hours were added or removed). Comment is required.
7. Select the *Reason or Transaction Type*: Options are Accrual import, Accrued hours forfeit, Accrued hours rollover, Community accrual, Manual adjustment, Rollover hours forfeit.
8. Click *Save*.



Make an accrual adjustment transaction

Note that the adjustment date for an accrual transaction must fall between the accrual calendar's beginning and ending dates.
From 01 January 2024 Through 31 December 2024

Adjustment date
6/19/2024

Adjustment hours
-8.00

Transaction comments
forfeited hours

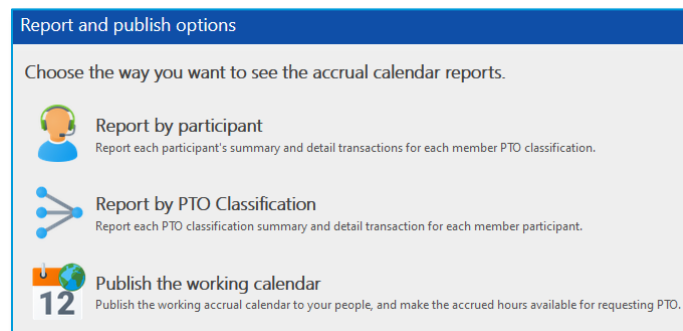
Reason or Transaction Type

- Manual adjustment
- Accrual import
- Accrued hours forfeit
- Accrued hours rollover
- Community accrual
- Manual adjustment
- Rollover hours forfeit
- Scheduled hours or adjustment

Save Cancel




Report and Publish

You may run a variety of reports associated with this working accrual calendar and when ready, publish the calendar.



Report and publish options

Choose the way you want to see the accrual calendar reports.

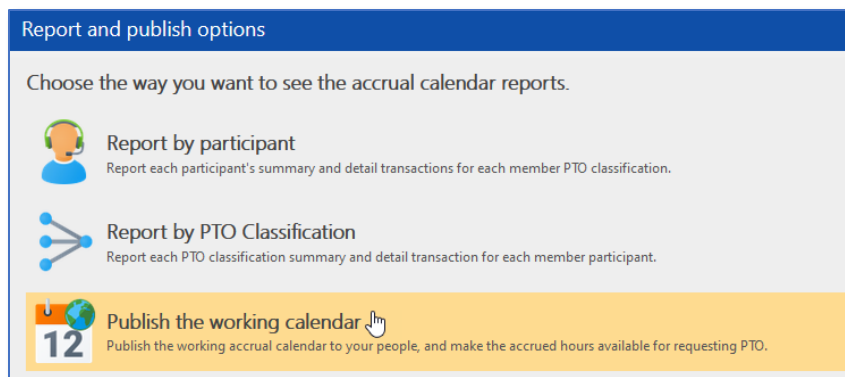
- 
Report by participant
 Report each participant's summary and detail transactions for each member PTO classification.
- 
Report by PTO Classification
 Report each PTO classification summary and detail transaction for each member participant.
- 
Publish the working calendar
 Publish the working accrual calendar to your people, and make the accrued hours available for requesting PTO.

Publish the working accrual calendar

When you're ready, publish the calendar to make the accrued hours available for time off requests. Upon publishing, agents will receive a notification that includes their total number of accrued hours (if notifications enabled).

Reminder: Once published, you cannot unpublish an accrual calendar. Be sure to confirm all accruals prior to publishing.

1. Click *Publish the working calendar*.



2. Check the box to confirm that you are ready to publish the calendar and understand that you cannot "unpublish" the accruals.

Publish working accrual calendar

Step 1: Select the participants and classifications to publish

Are you sure you want to publish this working accrual calendar?

By publishing the working accrual calendar, you are exposing the accrual transactions to the selected calendar participants. You cannot "un-publish" an accrual calendar, so any future changes must be performed in the published accrual calendar.

I understand that I cannot rescind the publish accrual calendar function.

Publisher's comments

Publish working accrual calendar '2021 Vacation' on Thursday, 15 Jul 2021 01:24 pm

Select the PTO Classification to publish (or "All PTO Classifications")

-- All PTO Classifications --

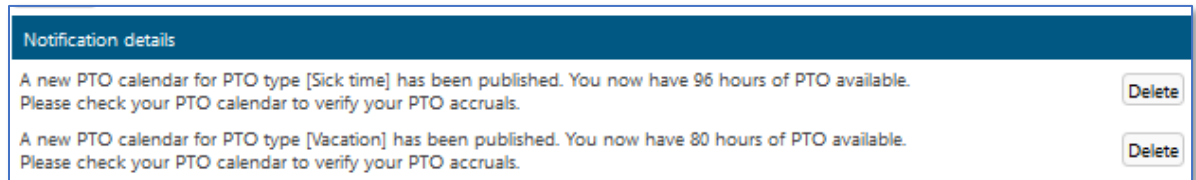
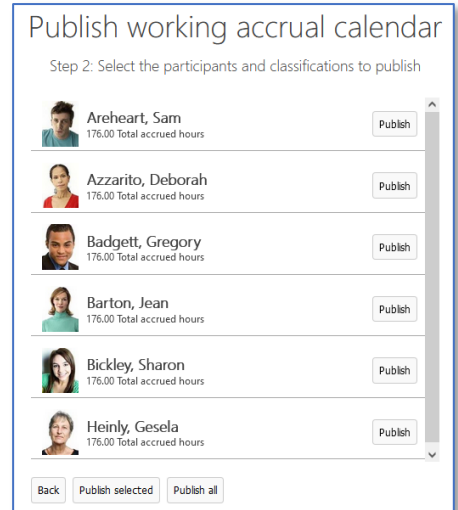
Select the participants to publish from the options below

Publish for all participants type (no filter applied).

Next

3. Add any additional comments, then select the PTO Classifications to publish. Default is *All PTO Classifications*.

4. Select the participants. Default is *Publish for all participant types (no filter applied)*. This will select the participants in the calendar, not all agents in your organization.
5. Click Next.
6. Refine the selection of participants or select *Publish all*.
7. When complete (the people disappear from the list), close the window.
8. Agents will receive a notification with their total accrued hours.



Any edits to an agent’s accrued hours must be made in the published accrual calendar.

Published accrual calendar

Plan > All things time off > PTO Calendars > Published accrual calendar.

Review and edit the published accrual calendar showing accrual transactions, withdrawals, and rollovers.

Calendar statistics at a glance shows the calendar start and end date, total of accrued hours, currently scheduled hours, accrual balance, and number of unassigned participants.




Published PTO accrual calendar							
Calendar statistics at a glance							
ACTIVITY	CALENDAR START	CALENDAR END		TOTAL ACCRUED HOURS	SCHEDULED HOURS	ACCRUAL BALANCE	UNASSIGNED PARTICIPANTS
COMMUNITY ENTE...	01 JAN 2024	31 DEC 2024	FULL YEAR	1240.00	-120.00	1120.00	88 (WHO?)
			YEAR TO DATE	1096.00	-120.00	976.00	

To add someone to a published calendar, click the *(Who?)* link under unassigned participants. From the pop-up list, choose a PTO policy for each person who you wish to add, then *Save assignments*.

Published PTO accrual calendar						UNASSIGNED PARTICIPANTS	
Calendar statistics at a glance							
ACTIVITY	CALENDAR START	CALENDAR END		TOTAL ACCRUED HOURS	SCHEDULED HOURS		
COMMUNITY ENTE...	01 JAN 2024	31 DEC 2024	FULL YEAR	1240.00	-120.00	88 (WHO?)	
			YEAR TO DATE	1096.00	-120.00		

Unassigned participants
 Hide list

The list below shows people assigned to the selected activity who do not currently have a PTO policy assignment. If you want to assign them to a PTO policy, select the PTO policy for each person and click the "Save assignments" button below.

	Bixler, Lyon Sales/Service Rep	-- Choose a PTO policy --
	Blakely, Latrice Sales/Service Rep	-- Choose a PTO policy -- Full time exempt time off
	Brown, Chanell Sales/Service Rep	-- Choose a PTO policy --



PTO Policy Summary

This summary shows how each PTO policy contributes to the total for the published accrual calendar. Within each section, a green top border indicates that there are policy transactions present; a red top border indicates no policy transactions.

PTO Policy summary			
This summary shows how each PTO Policy contributes to the total for the published accrual calendar.			
2024 EXCEL IMPORT ONLY		2024 Q1 FULL TIME	
0.00	0.00	768.00	624.00
Total accrued hours	Year to date hours	Total accrued hours	Year to date hours

PTO Classification Summary

This summary shows how each PTO Classification contributes to the total for the published accrual calendar, both total and year to date.

PTO Classification Summary			
This summary shows how each PTO Classification contributes to the total for the published accrual calendar. Note all values represent full accrual year totals.			
PTO			
	952.00	-120.00	832.00
	Total accrued hours	Total scheduled hours	Total balance
	952.00	-120.00	832.00
	YTD accrued hours	YTD scheduled hours	YTD balance
SICK			
	288.00	0.00	288.00
	Total accrued hours	Total scheduled hours	Total balance
	144.00	0.00	144.00
	YTD accrued hours	YTD scheduled hours	YTD balance

Accrual Type Summary

This summary shows how each accrual transaction type contributes to the total for the published accrual calendar.

Accrual type summary			
This summary shows how each accrual transaction type contributes to the total for the published accrual calendar.			
ACCRUED			
Represents accrued hours of PTO.			
1180.00	704.95		
Total hours	Year to date hours		
BID			
Represents hours committed in a PTO bid round.			
0.00	0.00		
Total hours	Year to date hours		
ROLLOVER			
Represents hours rolled over from one accrual period to another			
0.00	0.00		
Total hours	Year to date hours		
SCHEDULED			
Represents hours scheduled from the accrued PTO balance			
0.00	0.00		
Total hours	Year to date hours		

Participant Summary

This summary shows information related to the participants included in the published accrual calendar.

Participant Summary					
This summary shows information related to the participants included in the published accrual calendar.					
MINIMUM	MAXIMUM	AVERAGE	MINIMUM	MAXIMUM	AVERAGE
156.00	176.00	164.00	91.00	102.65	95.66
Accrued hours	Accrued hours	Accrued hours	Through Today	Through today	Through today

Manual adjustments

Adding hours for new hires, adding hours for someone who has a mid-year hire date anniversary, removing hours if someone took time off without using CommunityWFM, giving bonus vacation time to a high-performing employee, are a few of the reasons you might need to add or remove hours from an employee's accrued time.

There are three places where you can add or remove time from an agent's schedule:

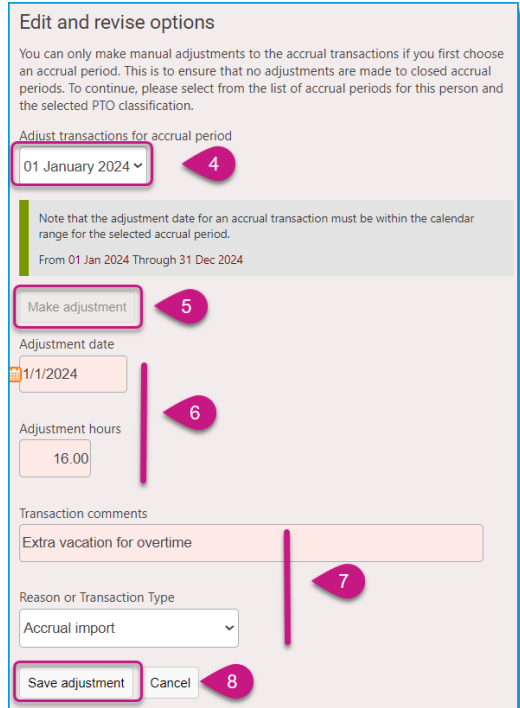
1. An agent's time off settings in their profile,
2. In a working accrual calendar (if it has not been published yet), and
3. In a published accrual calendar.

Agents must be part of a PTO policy to apply accrued hours.

Manually adjust hours in personal profile PTO settings

1. Navigate to the employee's PTO settings: Settings > People & agent templates > People > Personal profile > PTO settings for [agent name].
2. Select the PTO Classification to which you want to add or remove time. The adjustment must be made for an active (not closed) calendar period and the employee must be included in the calendar partition.
3. Select *Show options*.
4. In the *Edit and revise options* section, select the accrual period for the adjustment, noting the eligible date range.
5. Click *Make adjustment*.
6. In the expanded section, enter the date, number of hours to add or remove (include a – to subtract hours),
7. Add a comment and select the *Reason or Transaction Type*.
8. Click *Save adjustment*.

Your transaction will appear on the employee's ledger of accrued time.



Edit and revise options

You can only make manual adjustments to the accrual transactions if you first choose an accrual period. This is to ensure that no adjustments are made to closed accrual periods. To continue, please select from the list of accrual periods for this person and the selected PTO classification.

Adjust transactions for accrual period
 01 January 2024

Note that the adjustment date for an accrual transaction must be within the calendar range for the selected accrual period.
 From 01 Jan 2024 Through 31 Dec 2024

Make adjustment

Adjustment date
 1/1/2024

Adjustment hours
 16.00

Transaction comments
 Extra vacation for overtime

Reason or Transaction Type
 Accrual import

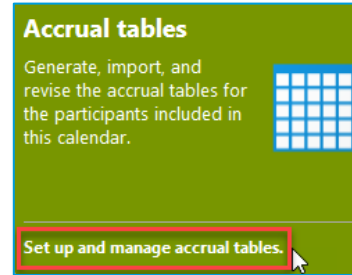
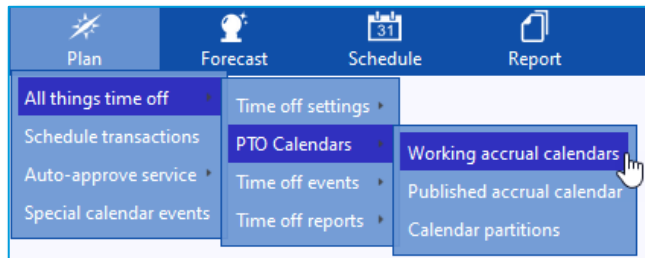
Save adjustment Cancel

Manually adjust hours in a working accrual calendar

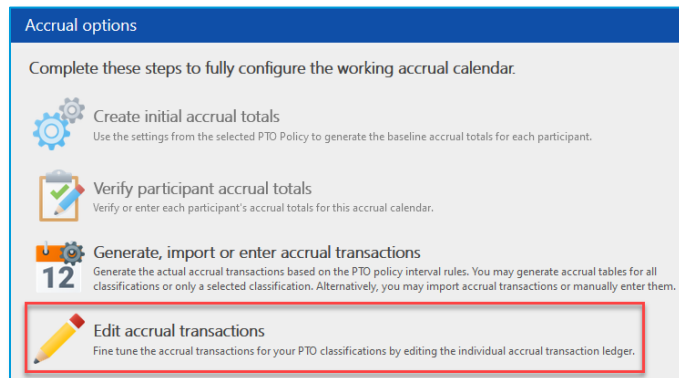
Use this method only if the accrual calendar has not been published yet.

Go to the Working accrual calendar.

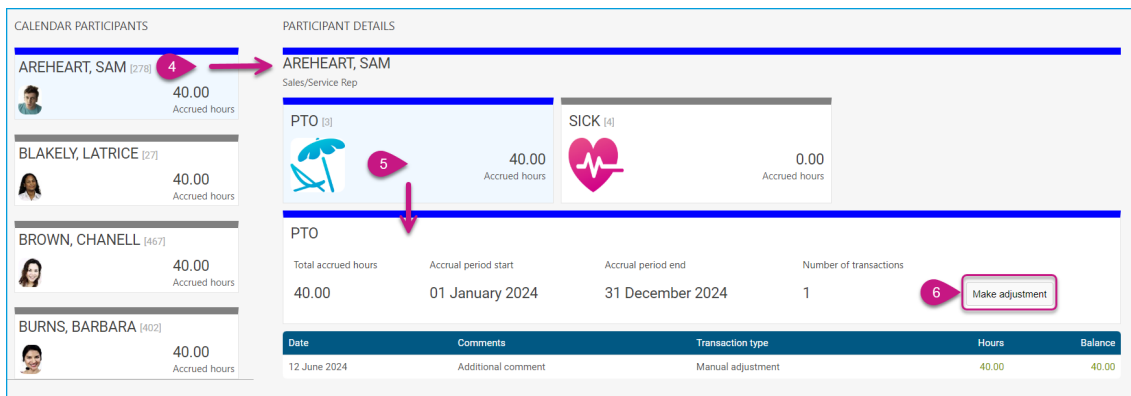
1. Open your selected calendar.
2. Go to *Set up and manage accrual tables*.



3. Select *Edit accrual transactions*.



4. Click on the agent's name.
5. Click on the selected PTO Classification to expand the transaction list.
6. Click *Make adjustment* (on the right above the table of transactions).



7. In the pop-up window, enter a date for the adjustment. The date must be within the bounds of the calendar.
8. Enter the number of hours to add or remove (include a minus sign (–) to subtract hours).
9. Enter a comment regarding the transaction (required).
10. Select a reason for the transaction.
11. *Save.*

Make an accrual adjustment transaction

Note that the adjustment date for an accrual transaction must fall between the accrual calendar's beginning and ending dates.
From 01 January 2024 Through 31 December 2024

Adjustment date
 7

Adjustment hours
 8

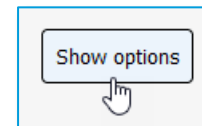
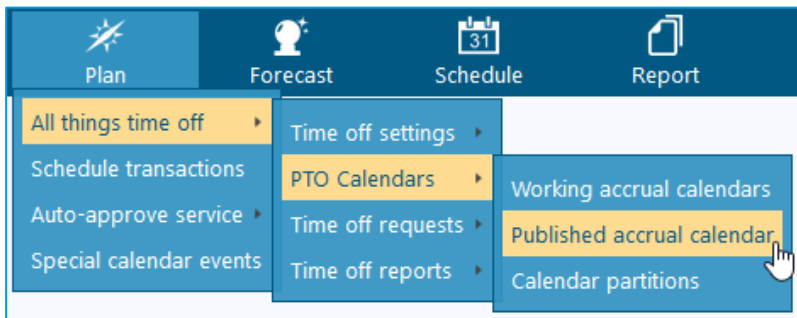
Transaction comments
 9

Reason or Transaction Type
 10

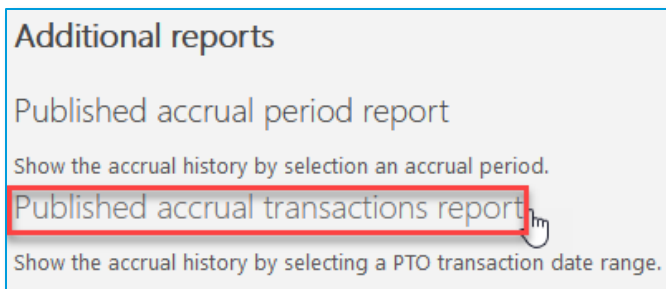
11

Manually adjust hours in a published calendar

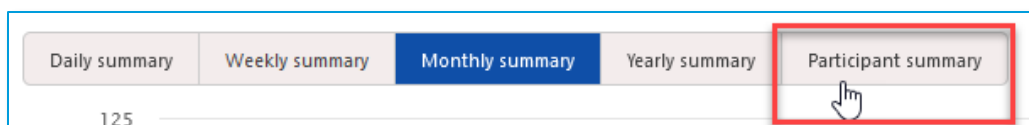
1. Go to the Published accrual calendar.



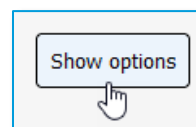
2. On the right side select *Show options* to expand the menu options.
3. At the bottom of the options panel, select *Published accrual transactions report*. Filter as needed then click *Apply options*.



4. Click *Apply options* to run the report.
5. Select *Participant summary* tab to display the people in this calendar.



6. Click on the tile for the person to whom you wish to add (or remove) accrual hours.
7. On the right side select *Show options*.



8. Select the date range and classification, then click *Apply options*. The *Make adjustment* option is available only after selecting the classification.
9. Click *Make adjustment*.
10. Select the date for the hours adjustment.
11. Enter the number of hours (include a minus sign (-) to subtract hours)
12. Add a comment (required)
13. Select the *Reason or Transaction Type*.
14. When finished, click *Save adjustment*. The hours will be added on the selected adjustment day and the agent will receive a notification.

Report filters and options

Transactions from date
1/1/2024

Transactions through date
12/31/2024

Restrict report to hours accrued in the selected PTO classification
PTO

Apply options

Edit and revise options

You can only make manual adjustments to the accrual transactions if you first choose an accrual period. This is to ensure that no adjustments are made to closed accrual periods. To continue, please select from the list of accrual periods for this person and the selected PTO classification.

Adjust transactions for accrual period
01 January 2024

Note that the adjustment date for an accrual transaction must be within the calendar range for the selected accrual period.
From 01 Jan 2024 Through 31 Dec 2024

Make adjustment

Make adjustment

Adjustment date
6/20/2024

Adjustment hours
8.00

Transaction comments
Extra vacation for working overtime

Reason or Transaction Type
Manual adjustment

Save adjustment

By clicking the button below, you will guide you through the

To upload an adjustment from an external source, select *Generate accrual transactions*. Click *Select* to run the Community native accrual provider or upload from Excel.

Report filters and options

Transactions from date
1/1/2024

Transactions through date
12/31/2024

Restrict report to hours accrued in the selected PTO classification
PTO

Apply options

Edit and revise options

You can only make manual adjustments to the accrual transactions if you first choose an accrual period. This is to ensure that no adjustments are made to closed accrual periods. To continue, please select from the list of accrual periods for this person and the selected PTO classification.

Adjust transactions for accrual period
01 January 2024

Note that the adjustment date for an accrual transaction must be within the calendar range for the selected accrual period.
From 01 Jan 2024 Through 31 Dec 2024

Make adjustment

You can regenerate the accrual transactions for this person by clicking the button below. The "Generate, import or enter accrual transactions" dialog will guide you through the process of generating accrual transactions.

Generate accrual transactions

Generate accrual transactions

Choose the source of the accrual intervals

- Community Native Accrual Provider**
Uses the application's built-in accrual rules to generate accrual tables. Select
- File Import - Excel**
Map an Excel (R) spreadsheet to your accrual table inputs. Select