



# Advanced Planned Time Off (PTO)

Webinar handout  
Version July 18, 2024



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## About this document

This document accompanies the CommunityWFM College webinar *Advanced 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)

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

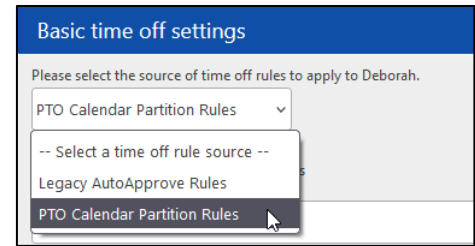


## Time off rules source

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.



To change many agents to calendar partition rules, use the agent synchronization wizard:

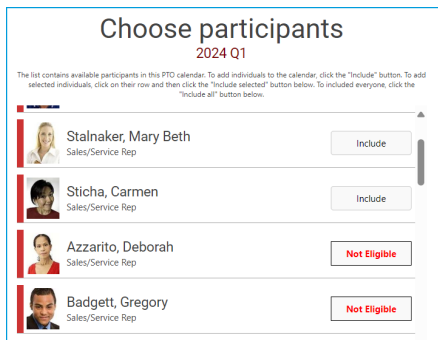
Settings > People & agent templates > Synchronize people > Synchronize people now.

To participate in a calendar partition (bidding or open selection), an agent must have *PTO Calendar Partition Rules* as the source of time off rules in their profile.

If *Legacy AutoApprove*, the agent cannot participate in a calendar partition. And if an agent is assigned to *PTO Calendar Partition Rules*, there must be a calendar in place where they can request time off.

If you will be executing vacation bids or using a calendar partition, the source of time off rules **must** be *PTO Calendar Partition Rules* and there must be a ranking profile that may be applied to agents (such as seniority).

Agents with Legacy Auto-Approve as a rules source will be listed as *Not Eligible* to participate in a calendar partition.





## PTO calendars

Plan > All things time off > PTO Calendars > Calendar partitions.

Build and maintain your calendar partitions, where agents make time off requests.

Calendars cannot be longer than one year, and the end date must be after the start date.

When naming your PTO Calendar, be as specific as possible. This name will be used in the notifications sent to agents and in reports. E.g., "Vacation 2025 Jan-Jun" instead of "Time off."

Now that we've established the accrued hours (discussed in the legacy PTO webinar), it's time to set up the mechanism by which agents can request these hours. The calendar partition establishes time off rules, bidding rules, and manages the time off bidding process and open selection after the completion of the bid.

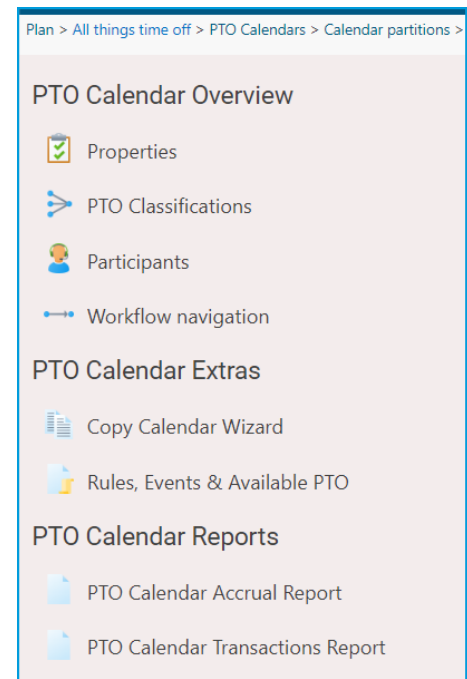
After creating the basic properties of the calendar partition, there is a helpful menu on the left side of the screen. From here you can link to, review, or edit all information about the calendar partition.

### PTO Calendar Overview

- **Properties:** Includes start and end date, whether to include prior accruals, ranking profile, whether to restrict classifications by shrinkage type.
- **PTO Classifications:** Which classifications are included and not included.

**Note:** After advancing to a bid or open selection in the workflow navigation, you can no longer edit the basic properties or classifications.

- **Participants:** Which participants are included. Add or remove people here.
- **Workflow navigation:** Move between a bid round, open selection, and finalizing/closing the calendar.





## PTO Calendar Extras

- **Copy calendar wizard:** Make a copy of the current calendar and apply it to a different date range or copy the attributes of the calendar for the same date range for a different group of people.
- **Rules, events, & available PTO:** View the available time off calendar, view or set up rules, or generate PTO accrual balances.

## PTO Calendar Reports

**PTO Calendar Accrual report** — shows the accruals in the calendar. It can be filtered by month, PTO Classification, PTO Classifications & month, and by Participant summary.

- **Monthly** report provides four ways to review your data. Click on any month and you'll see the accrual and bids for that month.
- **PTO Classification** will show you the data for all the classifications included in the calendar.
- **PTO Classifications & Month** will show you accruals by month and has additional filters to further drill into the data.
  - Balance
  - Total Accrued Hours
  - Scheduled Hours
  - Committed Hours
  - Non-committed hours
- **Participant summary** shows you an agent tile view similar to the bid response view. You can also filter the view to provide a list view.

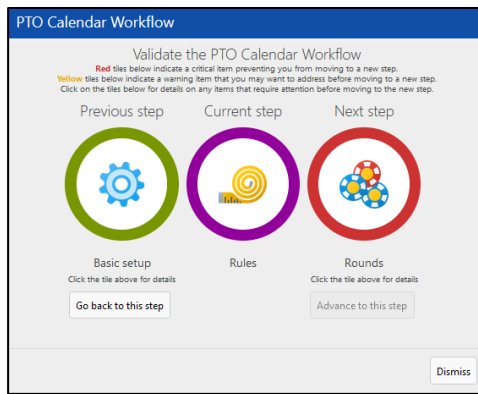
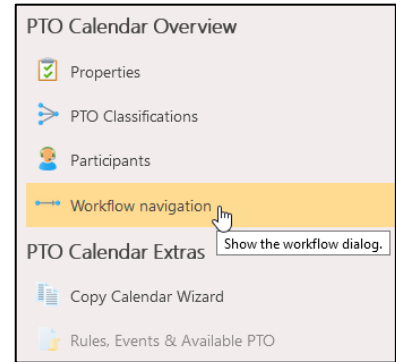
**PTO Calendar Transactions report** – Will show you at a glance Accrued, Bid, and Scheduled hours by agent.



## Workflow navigation

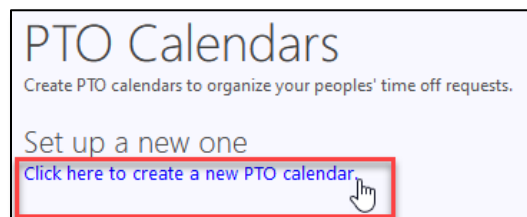
At any time during the calendar partition set up you can visit *Workflow navigation* to see where you are in the setup process.

The color-coded wheels let you know which steps are complete (green), your current step (purple), which may need more work (yellow), and which are not available (red) until you complete additional steps.



## Basic Setup PTO Calendar

Set up a new PTO calendar partition: *Click here to create a new PTO calendar.*





### PTO Calendar Properties

PTO Calendar Properties

Name	<input style="width: 90%;" type="text" value="Vacation for 2024 Bid Round 1"/>
Description	<input style="width: 90%;" type="text"/>
Calendar start date	<input type="text" value="1/1/2024"/>
Calendar end date (inclusive)	<input type="text" value="12/31/2024"/>
Include accrual transactions from days prior to start	<input style="width: 40px;" type="text" value="0"/>
Ignore accrual transactions from days prior to end	<input style="width: 40px;" type="text" value="0"/>
Participant selection type	<input type="text" value="Bid-round selection"/>
Include prior accruals when validating bid round selections	<input type="text" value="No, only use accrual transactions from the effective calendar date range."/>
Minimum role to view block selections	<input type="text" value="Agent"/>
Ranking profile selection	<input type="text" value="Hire Date + Tie Break"/>
Restrict PTO classifications by shrinkage type	<input type="text" value="Use PTO classifications associated with Discretionary Shrinkage."/>

**Name:** Required. Be sure to use a descriptive specific name such as *Vacation for 2024 Bid Round 1*. This name will appear in reports and in agent notifications.

**Description:** Optional

**Calendar start date:** Default is today’s date. Maximum duration for a calendar is one year.

**Calendar end date (inclusive):** Default is one year after start date.

**Include accrual transactions from days prior to start:** Refers to start of calendar. For example, if your calendar starts on January 3, 2022 (Monday of your work week), and your accruals begin on January 1, you would include transactions for 3 days prior to the start to make sure it includes those accruals.



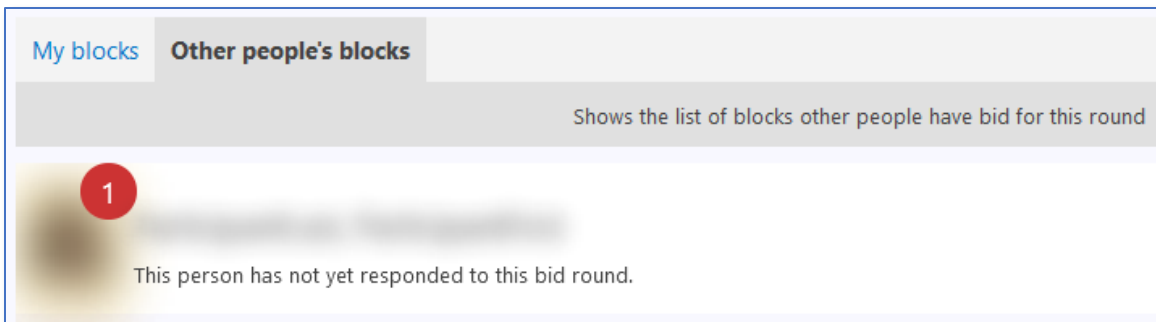
**Ignore accrual transactions from days prior to end:** If the calendar ends on a date after additional accruals happen, you can tell the calendar to ignore the days at the end when additional accruals occur.

**Participant selection type:** Bid round selection or open selection. Bid round selection = ranking profile and other bid rounds rules will apply. **Reminder:** Agents must have PTO Calendar Partition Rules as their rule source in their agent profile in order to participate in bid rounds. Open selection = ad hoc within the boundaries of the PTO calendar. If *Open selection*, you'll skip the bidding section.

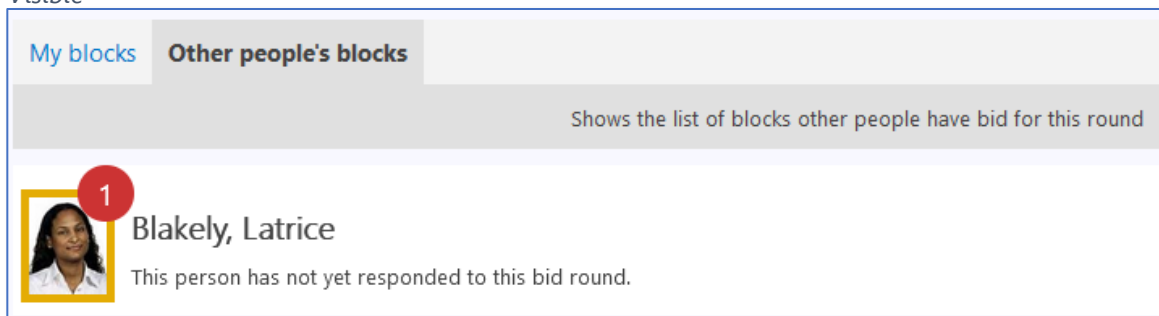
**Include prior accruals when validating bid round selections:** This will allow the calendar to include rollover hours (if allowed).

**Minimum role to view block selections:** Should agents be able to view other agent's requests by name/picture when making their bids? If not, select Supervisor or above. Agents will still be able to see which blocks have been selected, but the names and pictures are obscured.

*Obscured*



*Visible*





**Ranking profile selection:** Employee rankings based on your specified criteria. Seniority is a common example (ranking based on hire date).

**Restrict PTO classifications by shrinkage type:** Select discretionary, non-discretionary, or both.

After making all of your selections, click *Save*.

### PTO Classifications

Click *Set up PTO Classifications*.

**Configure PTO Classifications for this PTO Calendar:** Select which classifications to include in the calendar partition. This determines the accrued hours eligible for allocation to the calendar. For example, if you have separate accruals for sick and vacation, and have classifications for each, you would include only vacation time classification in this PTO calendar partition.

Click *Include* for each classification to include in the partition.

Classification	Default hours	Is a member?	Is Eligible
Vacation all vacation time	40.00		



## Participants

**Reminder:** You cannot add participants to a bid round calendar that is open for bidding. If you are planning to use bid rounds, ensure that you have added all desired participants prior to opening the bidding.

Click *Set up calendar participants*.

**Currently assigned people:** Click *Add people* to select who will participate in this PTO calendar. You can select from the Enterprise Model, Supervisor Group, Custom Group, etc. If a person is listed as *Not Eligible*, you will not be able to include them. People previously assigned may be removed here.

**Currently assigned people**







The following people are already assigned to this calendar. To add another, click the "Add people" button. To remove people, click the "Remove people" button. Note that a red border indicates that the person is inactive at this time.

No People are currently assigned to this PTO Calendar. Click the "Add people" button below to add people.

Agents with a green bar are included.

**Choose participants**  
Vacation Fall 2021 Bid Round 1

The list contains available participants in this PTO calendar. To add individuals to the calendar, click the "Include" button. To add selected individuals, click on their row and then click the "Include selected" button below. To include everyone, click the "Include all" button below.

	Areheart, Sam Sales/Service Rep	^
	Azzarito, Deborah Sales/Service Rep	
	Badgett, Gregory Sales/Service Rep	<input type="button" value="Include"/>
	Barton, Jean Sales/Service Rep	<input type="button" value="Include"/>
	Bickley, Sharon Sales/Service Rep	<input type="button" value="Include"/>
	Blakely, Latrice Sales/Service Rep	<input type="button" value="Not Eligible"/>

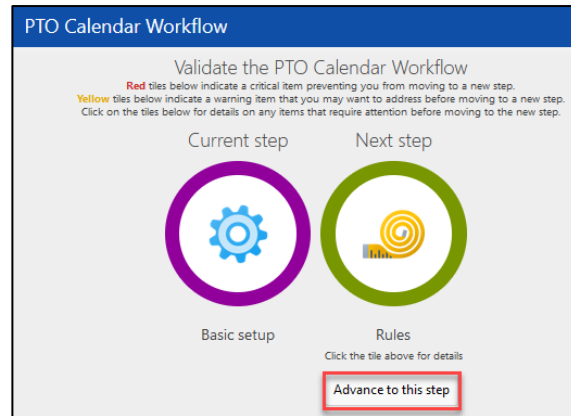
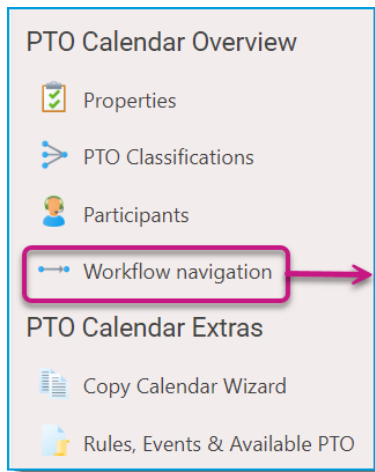


**Reasons why an agent may not be eligible:**

- The agent’s source of time off rules is set to Legacy AutoApprove Rules.
- The agent is participating in/assigned to another PTO Calendar.



After selecting the calendar participants, click *Workflow navigation* to proceed to the next step: setting up the rules for the calendar partition. Click *Advance to this step*.



**Rules**

You can import existing rules or set up new ones that apply only to this calendar. You may import the same rule into multiple calendars. **Note:** You can’t **export** rules created within a calendar.

**Set up rules within a calendar partition**


The PTO calendar worksheet displays a calendar where you can add special events such as holidays, add, remove, or edit time off rules (blackout, brownout days or minimum request interval rule), and confirm your final selections.



Scroll to the area below the calendar for menu options to configure the rules.

**Special Calendar Events**


Import Special Calendar Events into this PTO Calendar. This is useful for identifying holidays or other volume outliers.



Set up special calendar events.

**Time Off Rules**


Establish the time off rules that are applied to bid selections and time off requests during open selection.



Set up time off rules.

**Review and Confirm**


Review your special days and time off rules to make sure you have everything set up properly.



Confirm your rule setup.

**Workflow navigation**

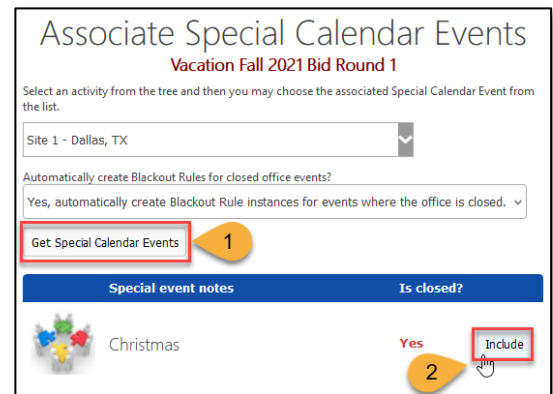
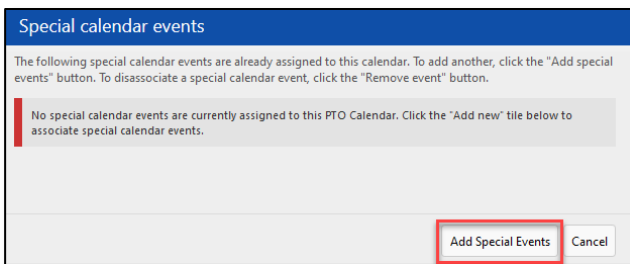
Advance to the next step to set up bidding rounds for your people to make their selections.



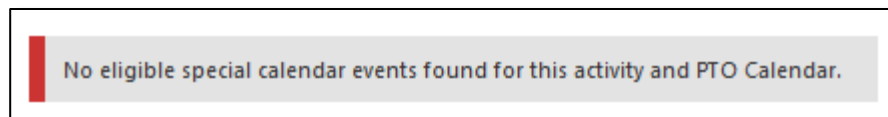
Show the workflow dialog.

## Special calendar events

Import special calendar events. **Note:** You cannot add new special calendar days directly to the time off rules calendar; create them in Plan > Special Calendar Events then import them into the calendar partition here.



If there are no eligible special calendar events, or if you have already added all eligible special calendar events, you will see:





## Time off rules

You can add specific rules that will apply only to this calendar. You may import existing rules or create new rules.

Rules created within a calendar cannot be exported.

**Manage your time off rules**

Select from the following options to manage the time off rules applied to this calendar:

- ↓
**Import from rules applied using legacy Auto-Approve**  
Select legacy auto-approve rules applied to Activities or supervisors, and import them into this calendar.
- +
**Apply new time off rules to this calendar**  
Select the type of time off rule and an Activity or supervisor to add new time off rules.
- ✏️
**Edit or delete existing calendar time off rules**  
Modify the properties of existing rules, or remove them permanently from the calendar.

[Dismiss](#)

### Import existing rules

Click each rule you wish to include and it will be immediately imported. Rules already imported are not available. You cannot "un-import" them here.

## Import legacy time-off rules

2024 Q1

What time off rules do you want to import?

-- Choose rule type --

-- Choose rule type --

I want to import rules applied to an Activity in the Enterprise Model.

I want to import rules applied to a Supervisor from the Organizational Tree.

No eligible legacy auto-approve rules found for the current PTO calendar. Note to be eligible, a rule must fall within the PTO calendar date range and cannot have been imported already.

## Import legacy time-off rules

2024 Q1

What time off rules do you want to import?

I want to import rules applied to an Activity in the Enterprise Model. ▾

[Show eligible rules](#)

Rule type	Applied to	Start date	End date	Rule specifics	
Agent Brownout Date Rule	Community Enterprise Model Enterprise Model	01 Jan 2024	31 Dec 2024	Monday 2 (Approved Requests); Tuesday 2 (Approved Requests); Wednesday 2 (Approved Requests); Thursday 2 (Approved Requests); Friday 2 (Approved Requests); Saturday 1 (Approved Requests); Sunday 1 (Approved Requests);	<a href="#">Import this rule</a>
Agent Minimum Request Interval Rule	Community Enterprise Model Enterprise Model	01 Jan 2024	31 Dec 2024	14	<a href="#">Import this rule</a>
Agent Blackout Date Rule	Community Enterprise Model Enterprise Model	04 Jul 2024	04 Jul 2024		<a href="#">Import this rule</a>
Agent Blackout Date Rule	Community Enterprise Model Enterprise Model	02 Sep 2024	02 Sep 2024		<a href="#">Import this rule</a>



To remove rules, go to the edit section. When finished, close this window.

**Note:** when importing rules, the dates must match. E.g., if the minimum request interval rule is for the whole year, but the calendar partition is only for one quarter, the rule will not be available to import.




*Apply new time off rules to this calendar*

Rules added here will apply only to this calendar. Options include blackout dates, brownout dates, and minimum request interval rules.

For each rule type, you can change who the rule applies to by including or excluding user groups, or restrict enforcement by PTO Classification or shrinkage type. You can apply these settings to blackout days, brownout days, or minimum request interval.

**Apply new time off rules**

Select from the list of supported time off rules to add new rules to the calendar.

- 
**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.
- 
**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.
- 
**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.

### Apply blackout date time off rule

**Part-time exempt - Fall**

How do you want to apply the time off rule?

Apply the rule by selecting from an activity on the Enterprise Model. v

Choose participants from this Activity

Community Enterprise Model v

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

-- Do not restrict to members of a custom user group -- v

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

-- Do not exclude members of a custom user group -- v

Do you want to further restrict enforcement of this rule?

No, do not further restrict enforcement of this rule. v

No, do not further restrict enforcement of this rule.

Restrict enforcement to events assigned to a selected PTO classification.

Restrict enforcement to events assigned to a specific shrinkage type.

Choose dates



Edit or delete existing calendar time off rules.

This is the area to delete or edit any existing rules.

**Manage your time off rules**

Select from the following options to manage the time off rules applied to this calendar.

- ↓
**Import from rules applied using legacy Auto-Approve**  
Select legacy auto-approve rules applied to Activities or supervisors, and import them into this calendar.
- +
**Apply new time off rules to this calendar**  
Select the type of time off rule and an Activity or supervisor to add new time off rules.
- ✎
**Edit or delete existing calendar time off rules** ☞  
Modify the properties of existing rules, or remove them permanently from the calendar.

**Currently applied time off rules**

The following list shows all of time off rules you currently have applied to this PTO calendar.

Rule type	Applied to	Starts on	Ends on	Included group	Excluded group	Created by	
<b>Agent Brownout Date Rule</b>	Site 1 - Dallas, TX	Enterprise Model	01 Jan 2021	31 Dec 2021	N/A	N/A	Account, Service <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">Remove</span>
<b>Agent Minimum Request Interval Rule</b>	Site 1 - Dallas, TX	Enterprise Model	01 Jan 2021	31 Dec 2021	N/A	N/A	Account, Service <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">Remove</span>
<b>Agent Blackout Date Rule</b>	Site 1 - Dallas, TX	Enterprise Model	20 Nov 2021	20 Nov 2021	N/A	N/A	Account, Service <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">Remove</span>
<b>Agent Blackout Date Rule</b>	Site 1 - Dallas, TX	Enterprise Model	21 Nov 2021	21 Nov 2021	N/A	N/A	Account, Service <span style="float: right; border: 1px solid #ccc; padding: 2px 5px;">Remove</span>

Click here to edit the application of this rule.

Refresh
Delete all
Dismiss

If you don't see recently added rules, click *Refresh*.

Click on the rule name to edit, or the *Remove* button to delete.

Return to the Rules page to view the color-coded calendar with your rules applied.

Use the menu at the top to filter the view to display or hide the different types of rules. You can filter for types of rules and display all or none.

**November 2021**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	01	02	03	04	05	06
07	08	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

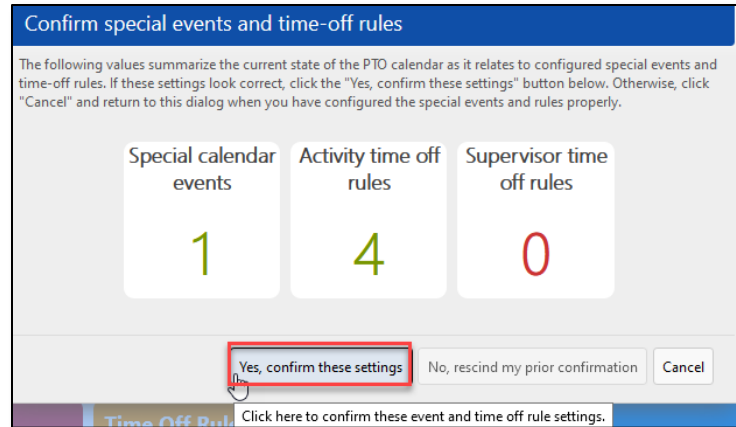
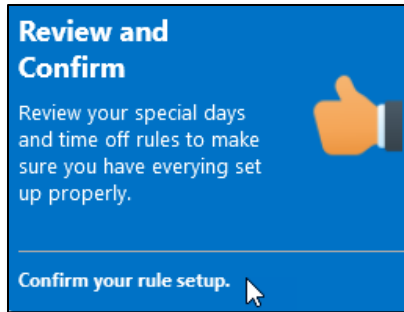
Select visible layers

- Included special days
- Blackout rule dates
- Brownout rule dates
- Request interval rule dates

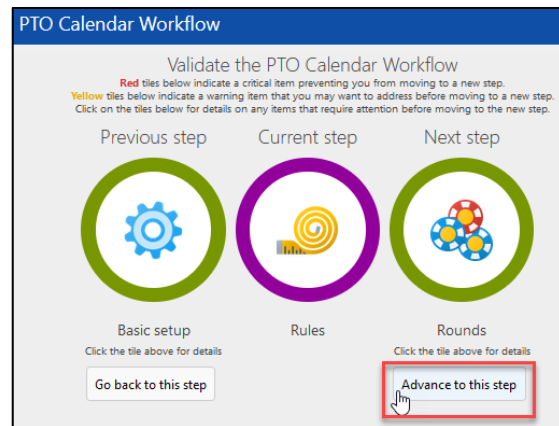


## Review and confirm

You must confirm your rules before moving to the next step.



**Workflow navigation:** Move on to the next step to setup the bidding rounds or advance to open selection.



## New Bid Round

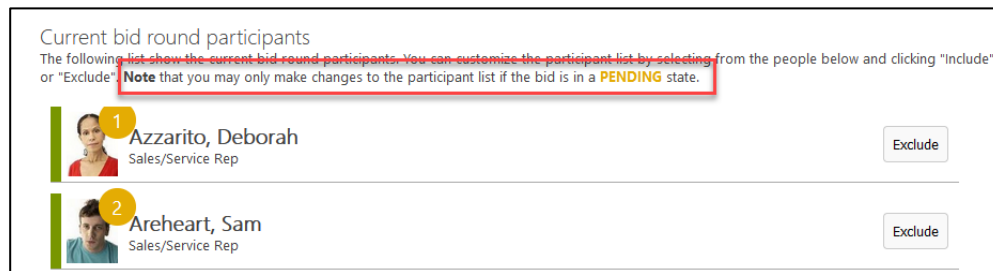
### Bid round properties

Bidding is optional; calendar partitions may use open selection only.

During a bid round, the rules of the bid round apply and govern the validity of a given block and selection. A **block** is a request, and a **selection** is the sum of all the blocks (requests) within a bid round response. During open selection people can make selections that are not part of a block (e.g., a single day if the block rules require a request of at least 5 days), but the other calendar rules for auto-approve are still in effect (e.g., blackout days, minimum request interval).


**Reminders:**

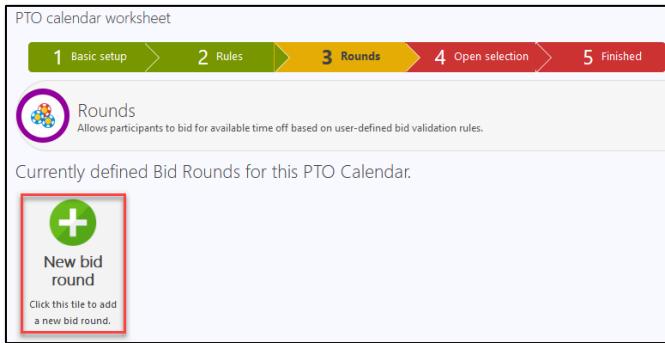
- If there is an open bid round in progress, CommunityWFM will not auto-approve time off requests for agents attached to the PTO Calendar if the requested dates fall within the active bid round calendar.
- **Note:** You cannot add agents to a bid round after the bidding has opened, even though you can add them to a calendar. **Be sure to include all agents prior to opening the bid round.**



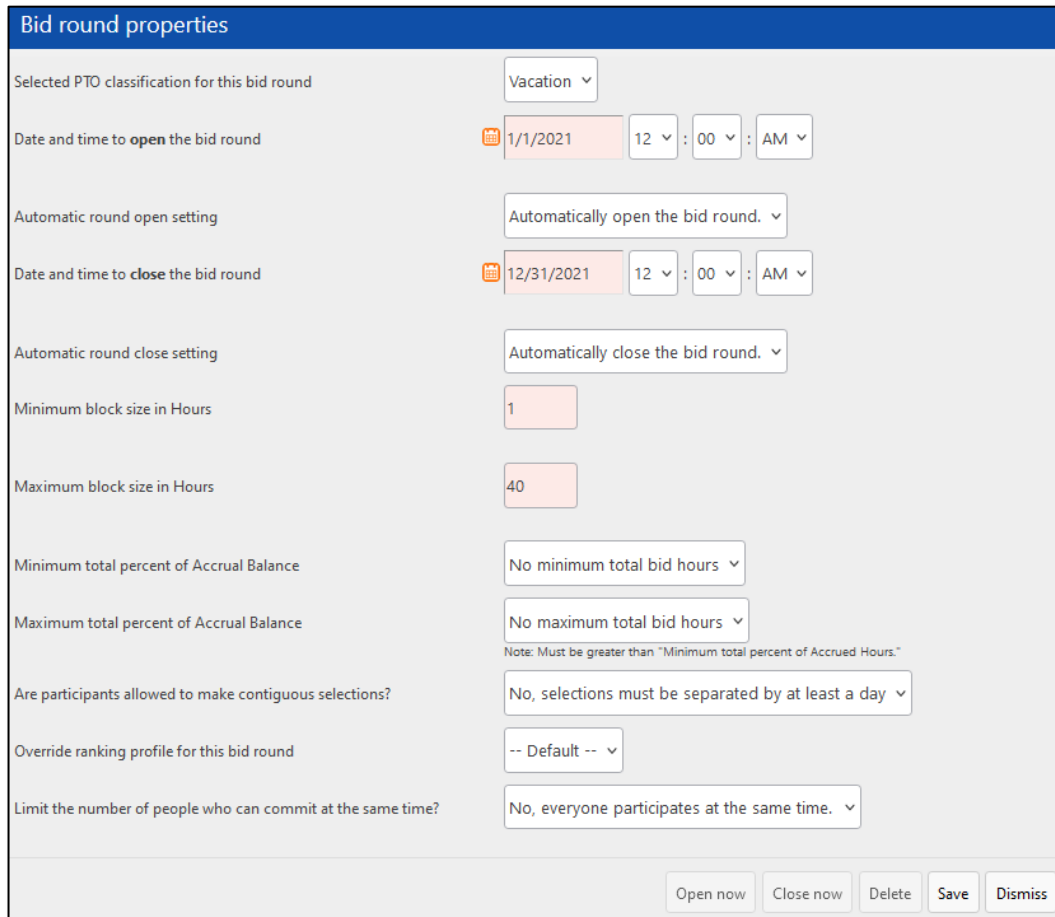
- If an agent has a RAP that specifies time off requests or is on a new hire restriction, they will not be able to participate in the bid. If bidding for future dates (e.g., bidding in the fall for next year's vacation time), consider removing the restrictions during the time of the bid. If removing for all agents, turn off the *Agent Restricted Activity Plan Enforcement Rule* in the rule settings (Plan > All things time off > Time off settings > Time off rule settings).
- You can only have one bid round open for any given time period for a group; the dates cannot overlap.
- If using the automatic open and close feature, the open and close dates must be within the calendar dates. If you want to open the bidding prior to the calendar start, you can manually open the bid.
- Once a bid is opened and then closed, it cannot be re-opened.



Click the tile to create a new bid round.



**Selected PTO classification for this bid round:** You can include only one classification in your bid round.



**Date and time to open the bid round:** Select the date and time to open the bidding. Because bid rounds cannot overlap, this date and time will determine when this bid round will be open. If there is another bid round opening at the same time, you will get an error



message. **Reminder:** the date must be within the bid round calendar, but you can manually open the bid.

**Automatic round open setting:** If you select *Do not automatically open the bid round for participant selection*, you will need to manually open the bid round.

**Date and time to close the bid round:** Select the end date and time to stop the bidding.

**Automatic round close setting:** Select whether to automatically or manually close the bidding.

**Minimum block size in hours:** A block is single time off request. If you want each person to request no fewer than five consecutive days in their bid, and your *Default hours for FTE* setting in general settings and preferences is 8-hour shifts – the block is 40 hours. If a person may make a request for 1 day, the block is 8 hours.

**For example:** Companies may wish to have everyone select their full week of vacation during the first bid round, then allow people to select individual days later during open selection.

**Maximum block size in hours:** Is there a maximum number of days an agent can request? For example, if you want to limit agents to requesting no more than one week during the first bid round, and your *Default hours for FTE* setting in general settings and preferences is 8-hour shifts, enter 40 hours.

**Minimum total percent of accrual balance:** Do agents need to use a percentage of their accrued time? For example, if agents earn 80 hours a year, you can require that they use at least 20 hours (25%) in the bid. Several blocks can add up to the minimum total percent.

**Maximum total percent of accrual balance:** You can also set a maximum percent of hours. This can help throttle the total hours used by any agent. For example, if you want to prevent agents from requesting 4 separate weeks of 40-hour blocks in one bid, set a maximum total percent.

**Are participants allowed to make contiguous selections?** Refers to selecting consecutive work days in a time off request. If *No*, there has to be at least one work day between each day of the request. If *Yes*, an agent is able to request multiple days off together. Work days are determined in the Enterprise Model Work Habits & Hours.



## Examples

Select *No*, not contiguous, if agents have comp days or floating holidays and you want them to request them as individual days, not all together.

Select *Yes*, contiguous if you want them to request a full 40-hour block (one week) such as during an initial vacation bid round. In the next round you might select *No*, and agents can request individual days.

**Override ranking profile for this bid round:** *Default* will use the ranking profile in the PTO calendar, but you can change it for this bid round.

The difference between this and shift bidding is that there is no fixed inventory of time off requests. Each agent will bid in sequence order from the remaining PTO.

**Limit the number of people who can commit at the same time?** This enables limiting the number of agents eligible to commit bids at a given time. How many people can enter bids at the same time? If there are a large number of bid round participants, and staffing allows multiple people to be off at the same time, the bid will progress faster if you allow multiple people to bid at the same time. Reminder: All participants who are eligible to commit their bids are bidding for time first come / first served, i.e., their ranking no longer applies.

**No, everyone participants at the same time:** = first come, first served. There's no limit on the number of people who can make requests at the same time. Bid commitment occurs on a first committed > first confirmed basis.

**Yes, but only a fixed number of participants:** You can designate that only a certain number of agents are allowed into the bid at the same time. As one person commits their bid, the next person can join the queue and commit a bid.

**Yes, but only a percentage of participants:** You can set a certain **percentage** of people who are allowed into the bid at one time. As the percentage of people who have committed bids changes, additional people are able to join the queue and commit a bid.

The number or percentage you choose should be sensitive to the size of your agent pool and the availability of your time off resources.



After building the properties, the calendar is in a pending state waiting for the date/time to automatically open or you can manually open the bidding.

Open calendars are green.

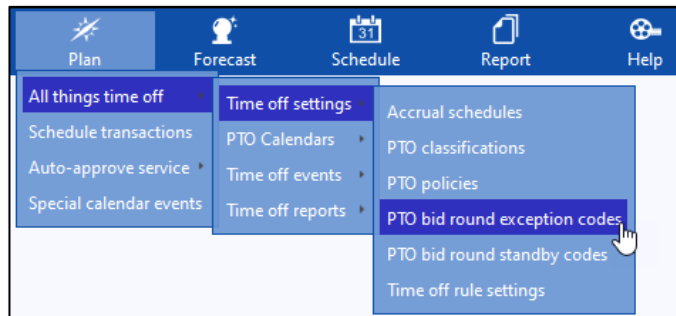


After the calendar is opened, eligible participants will receive a notification and can view available time, and even enter and validate their bids prior to their turn in the queue, but they will not be able to **commit** their bid until it's their turn.

### PTO bid round exception codes

Plan > All things time off > Time off settings > PTO bid round exception codes.

Create custom reason codes used to grant PTO bid round participants exceptions to various PTO rules.



There are two existing standard codes:

*Insufficient available accrued hours to meet bid rules, and Insufficient available PTO to meet time off rules.*



Select *Click here to create a new reason code*.

PTO bid round exception reason codes

Customize the list of reason codes used to explain a bid round rule exception.

Set up a new one  
[Click here to create a new reason code](#)

Current list

Name	Editable	User defin
Insufficient available accrued hours to meet bid rules.	No	No
Insufficient available PTO to meet time off rules.	No	No

Enter the text for your code and select whether it can be edited later then Save.

PTO bid round exception reason code properties

Reason code text

Is this reason code editable in the future?

No, this reason code is not editable. (selected)

No, this reason code is not editable.

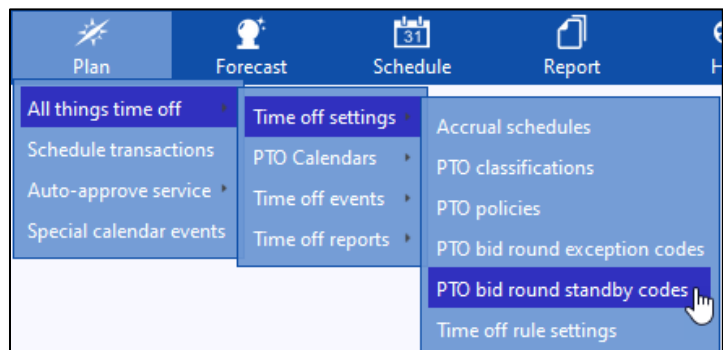
Yes, other users can edit this reason code later.

Save Cancel

### PTO bid round standby codes

Create custom reason codes for bid round participants in standby mode. Use these codes when a bid round participant is unwilling or unable to respond when it is their turn to make a request for time off.

There are two existing standard codes: *Participant is not responding to administrator requests to commit*, and *Participant is on PTO during bid round selection*.





Select [Click here to create a new standby reason code.](#)

**PTO bid round standby reason codes**  
 Customize the list of reason codes used to explain a bid round participant's standby mode.

Set up a new one  
[Click here to create a new standby reason code](#)

Current list

Text	Editable	User defined	Is default?	Commits allowed?	
Participant is not responding to administrator requests to commit.	No	No	No	Yes	Delete
Participant is on PTO during bid round selection.	Yes	No	Yes	No	Delete

Enter the text for your code and select whether it can be edited later. Select whether this should be the default code, and whether bid participants can still commit bids while in standby mode.

**PTO bid round standby reason code properties**

Reason code text

Is this reason code editable in the future?  
 ▾

Should this reason code be used as the default for automatic standby events?  
 ▾

**Note:** Only a single reason code can be marked as the default for automatic standby events.

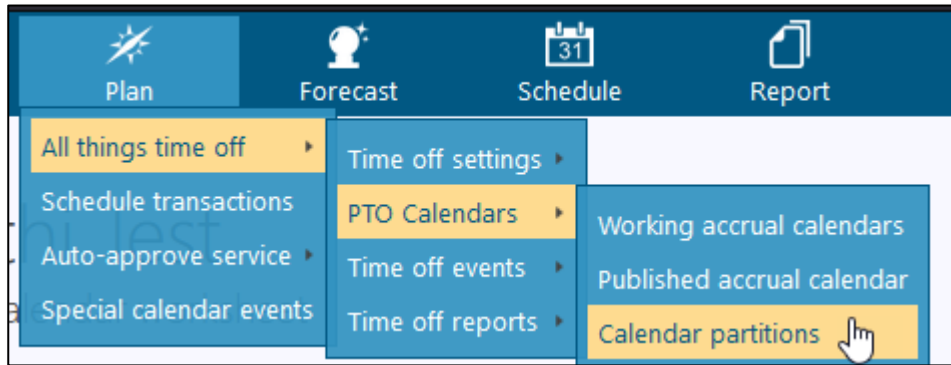
By **default**, are participants allowed to commit bids while in standby when using this reason code?  
 ▾

**Note:** You may override this setting when putting a bid participant in standby mode.



## Managing bids rounds

Go to the Bid Round: Plan > All things time off > PTO Calendars > Calendar partitions



Select the Calendar partition name from the Current list.

PTO Calendars  
Create PTO calendars to organize your peoples' time off requests.

Set up a new one  
[Click here to create a new PTO calendar.](#)

Current list

Status	Name	Description	From date	Through date	Open date	Preview date	Block visibility	
Rounds	Fall 2021 vacation		01 January 2021	31 Dec 2021	29 Jul 2021	29 Jul 2021	Agent	Delete

Select *Show the details* to open the Bid Round Worksheet.

Currently defined Bid Rounds for this PTO Calendar.

**1** Test

*Open*

The open date of this round is **21 Jul 2021**, and the close date is **31 Dec 2021**.

Edit the properties: [Show the details](#)

**+**

New bid round

Click this tile to add a new bid round.

Select *Bid responses* from the Bid Round Worksheet options navigation pane




Bid Round Worksheet options

- Overview & Summary
- Bid participant list
- Bid round exceptions
- Bid responses Show the response report
- Bid standby events
- Bid round accrual report

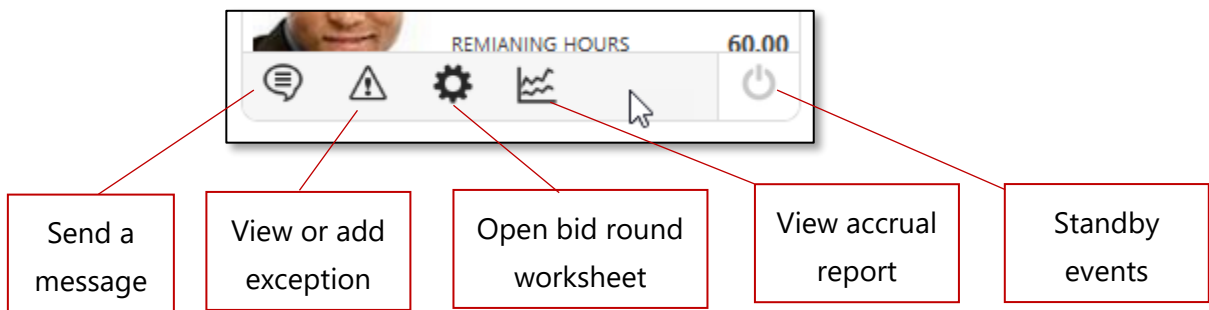


In this example, Deborah has committed a valid bid (green), Sam has made a valid bid but has not yet committed his selection (yellow), and Jean has not yet made a selection.

Current bid round responses  
Current bid round participants and their responses.

Azzarito, Deborah 1			Areheart, Sam 2			Barton, Jean 3		
	BALANCE HOURS	76.00		BALANCE HOURS	80.00		BALANCE HOURS	40.00
	REQUIRED HOURS	0.00		REQUIRED HOURS	0.00		REQUIRED HOURS	0.00
	BID HOURS	4.00		BID HOURS	40.00		BID HOURS	0.00
	REMIANING HOURS	76.00		REMIANING HOURS	40.00		REMIANING HOURS	40.00
	BID VALIDATION STATE	VALID		BID VALIDATION STATE	VALID		BID VALIDATION STATE	PENDING

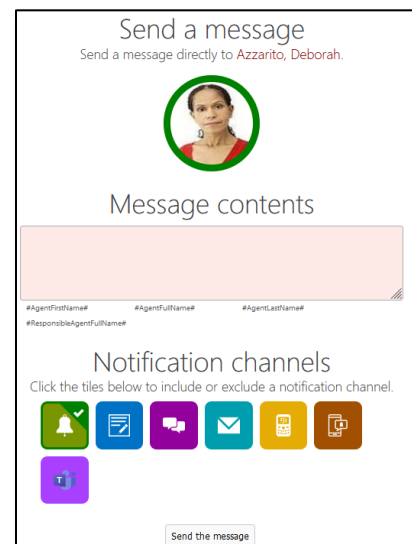
Hover over the bottom of an agent tile to view additional options:



### Send a message

Opens a new window to send a message to the agent using one or more notification channels.

Copy and paste the # codes below the message field to customize your message.



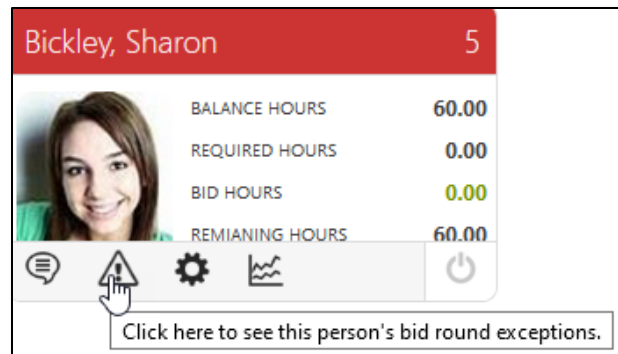


## View or add bid round exceptions

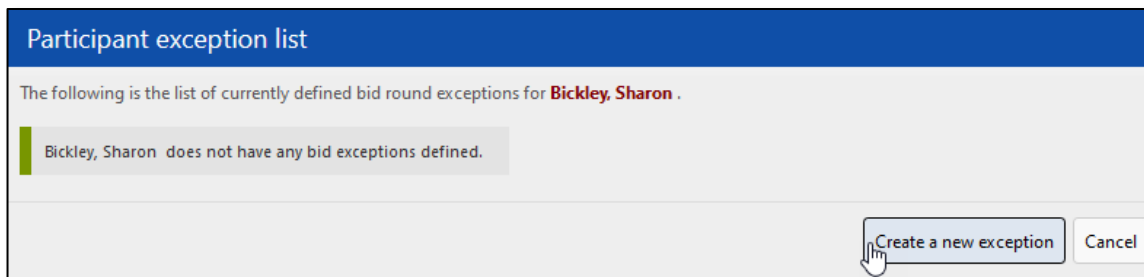
Agents may request a bid exception if their request does not meet one or more of the validation rules. You may also enter an exception for an agent. At this time there isn't a notification when an agent requests an exception, and agents should be encouraged to send a memo or email to their supervisor when making a bid exception request.

### Create an exception for an agent

Select *Click here to see this person's bid round exceptions*.



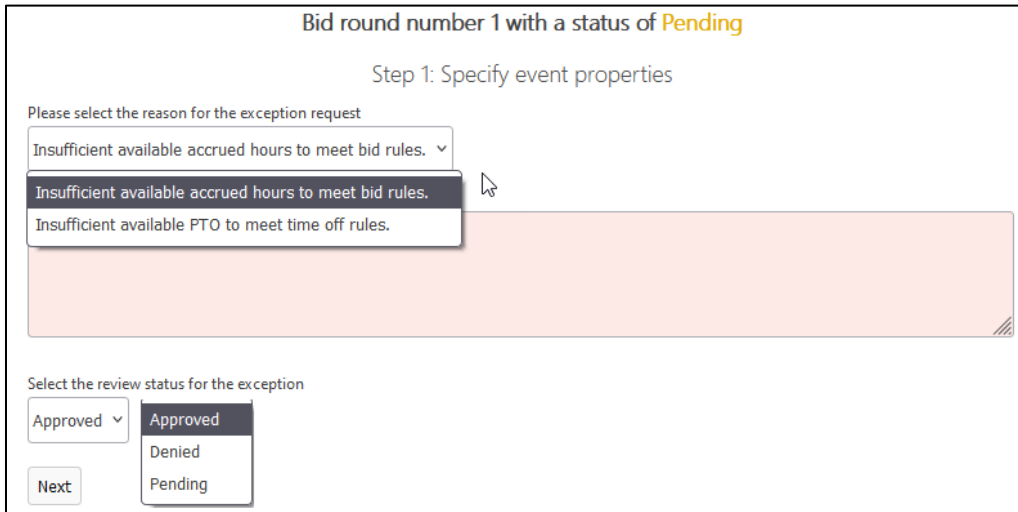
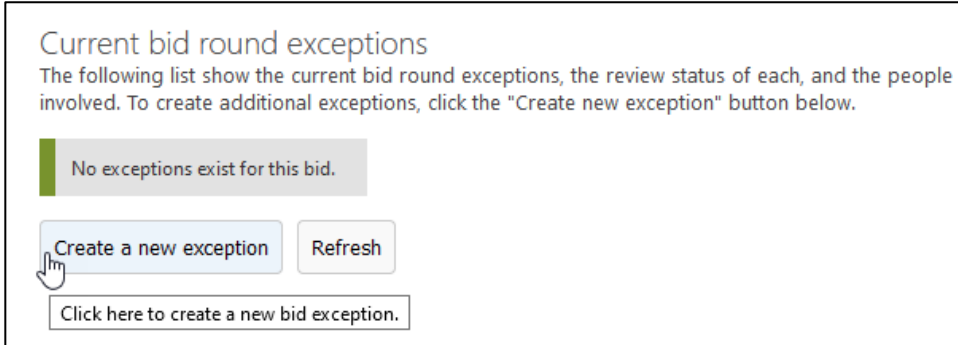
Select *Create a new exception*. You will be able to include any calendar participants in a later step.



1. Click *Create a new exception*.
2. Select the reason for the exception request and provide an explanation (required). If during a bid round, select the first option (*Insufficient available accrued hours to meet bid rules*). If making a time off request outside of a bid, use the second option (*Insufficient available PTO to meet time off rules*).
3. Select the preferred status – approved, denied, or pending.

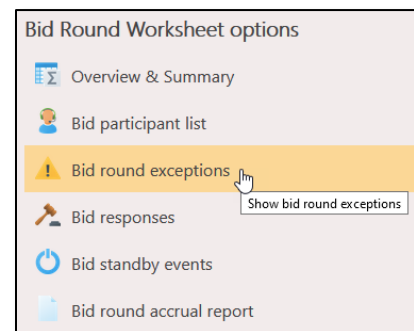


- On the next screen, select the bid round rule(s), Bid block rule(s), Activity time off rule(s) and/or Supervisor time off rule(s) for which you are creating the exception.
- Click *Next*.



- Select the participant(s) for this exception from the list of calendar participants.
- Click *Save exception*.

To view all current exception requests (not just for one agent), go to the Calendar partition and select *Show the details* for the calendar to open the Bid Round Worksheet. Select *Bid round exceptions* from the *Bid Round Worksheet options*. Current bid round exceptions may be deleted, denied, approved, or returned to pending status on this screen. Exceptions will remain on this page. Once approved or denied, the agent will not be able to edit or delete the exception request.





Current bid round exceptions

The following list show the current bid round exceptions, the review status of each, and the people involved. To create additional exceptions, click the "Create new exception" button below.

Create date	Reason code	Comments	Review status	Participants	Activity rules	Supervisor rules	Block rules	Round rules
29 Jul 2021	Insufficient available accrued hours to meet bid rules.	OK to take vacation if HR approves.	Pending	Azzarito, Deborah	0	0	0	1

Buttons: Create a new exception, Refresh

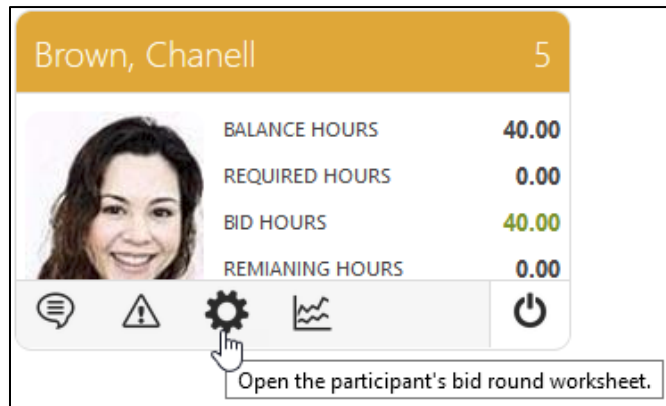
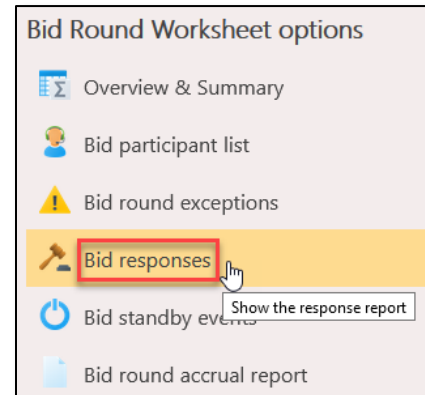
After an administrator has approved an exception, the agent will need to revalidate the block request (not just the round).

### Viewing an agent's Bid Round Worksheet

You can view an agent's Bid Round Worksheet and submit bids on their behalf, validate or commit their bids, or override a validation rule.

In the Bid Round Worksheet, go to *Bid responses*.

Hover over the bottom of the tile with the person's name until the icons pop up. Select the gear icon.



You can review an agent's Bid Round Worksheet, validate and / or commit their rounds, or even *Add a block* (make selections) for an agent (e.g., if an agent is not in the office and emails their bid selections to you).

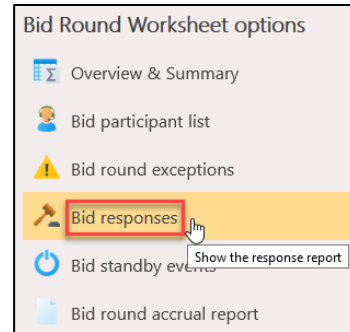
Agents will receive an automatic notification "from" the person who made the changes.



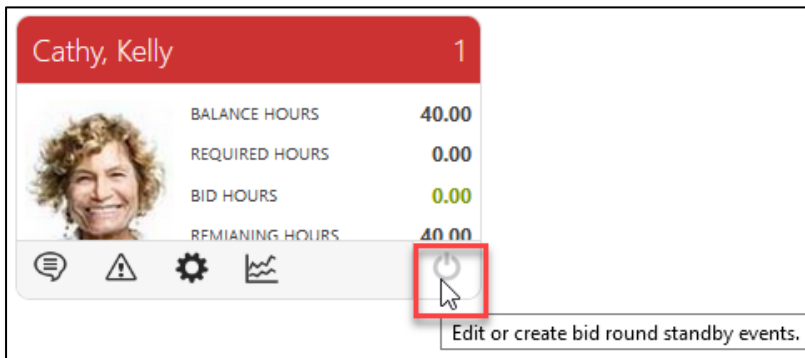
## Placing agents on standby

If an agent is not responding to requests to commit their bid, or if they are out of the office during the bid round, you can place them in standby mode. They will not lose their place in line, but someone else can make a bid and the process continue until you remove them from standby.

In the Bid Round Worksheet, go to *Bid responses*.



Hover over the bottom of the tile with the person's name until the icons pop up. Select the icon on the right – *Edit or create bid round standby events*.



**Standby event reason code:** Select the reason why you are placing the person in standby (not responding or out of office on PTO) and add a comment.

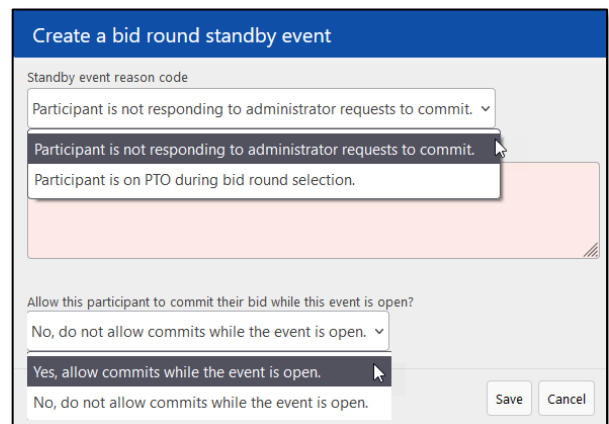
**Allow this participant to commit their bid while this event is open?** Select whether the person will be able commit their bid while in standby mode.

The color bar for the agent's tile will be maroon, indicating they are in standby mode.

## Taking agents out of standby

Return to *Edit or create bid round standby events*.

Select *Close this event*. The window will close and the agent will return to their place in line.



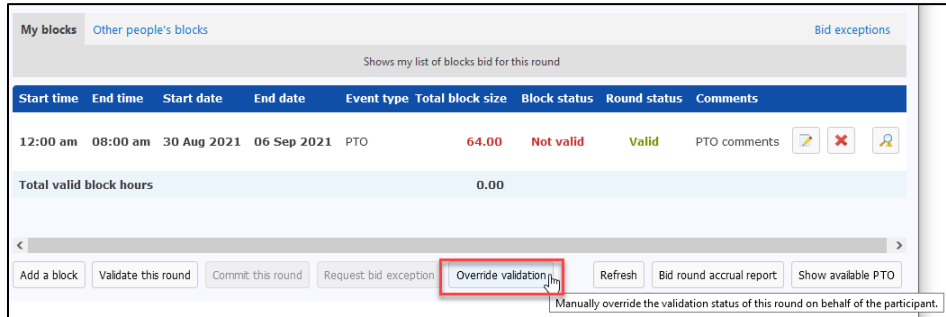


## Validation override

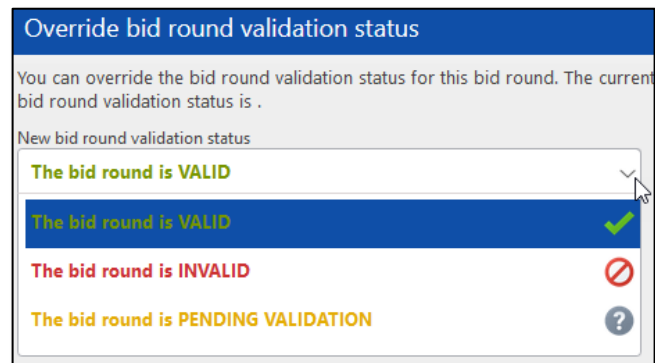
Use validation override to approve a time off request that fails validation or does not meet the auto-approve rules during a bid round.

Go to the agents Time off worksheet and review their bid request.

Select *Override validation*.



Select the new validation status. If *Pending validation*, the bid round will be automatically validated by the System Monitor service (if the service is enabled).



## Close the bid round

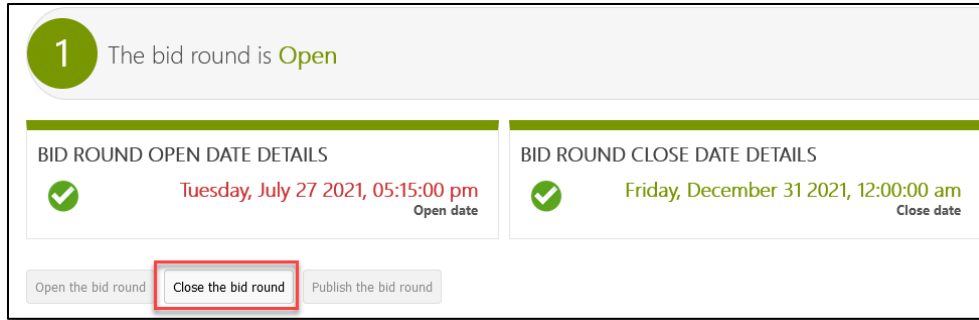
Review participant status and responses.

Send reminders if there are agents who have not committed their bids.

Go to the bid round and select *Show the details*.

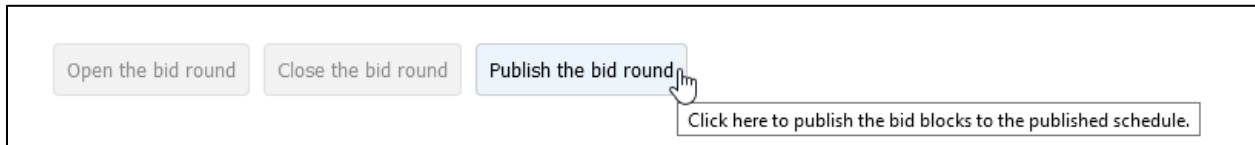


Click *Close the bid round*.

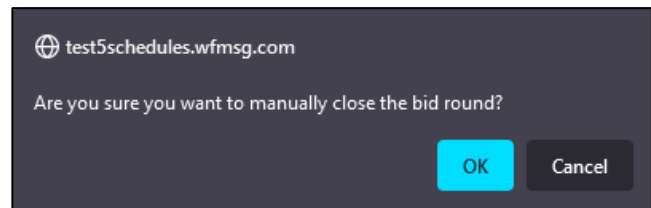


Confirm that you want to close the bid round and click *OK*.

Click *Publish the bid round* to publish the round.



A pop-up window will display all of the participants, their ranking, and their bids. At this window you can choose to commit any uncommitted bids.



**Note:** Any bids not committed by the agent during the bid round, or by you prior to publishing the bid, will no longer be available after publishing the bid round.



Check the box to confirm that you understand you cannot make additional edits, add a comment, then click *Publish this bid*.

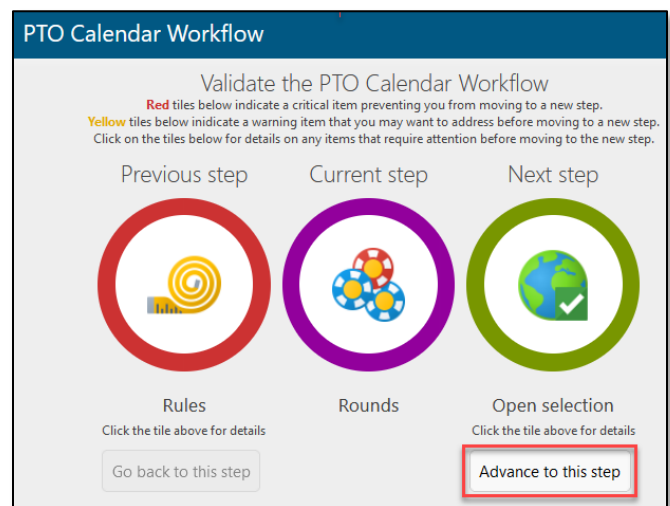
Publishing the bid round will send a memo to the participants and place the time off events on their schedule.

## Open Selection

After completing (publishing) a bid round, you can move the calendar to open selection where agents can request time off without waiting in line to bid. The rules for the calendar will still apply.

You may also skip the bid round and go directly to open selection.

To advance to open selection, go to the *PTO Calendar overview*, select *Workflow navigation*, and click *Advance to this step*. This changes the round to open selection.



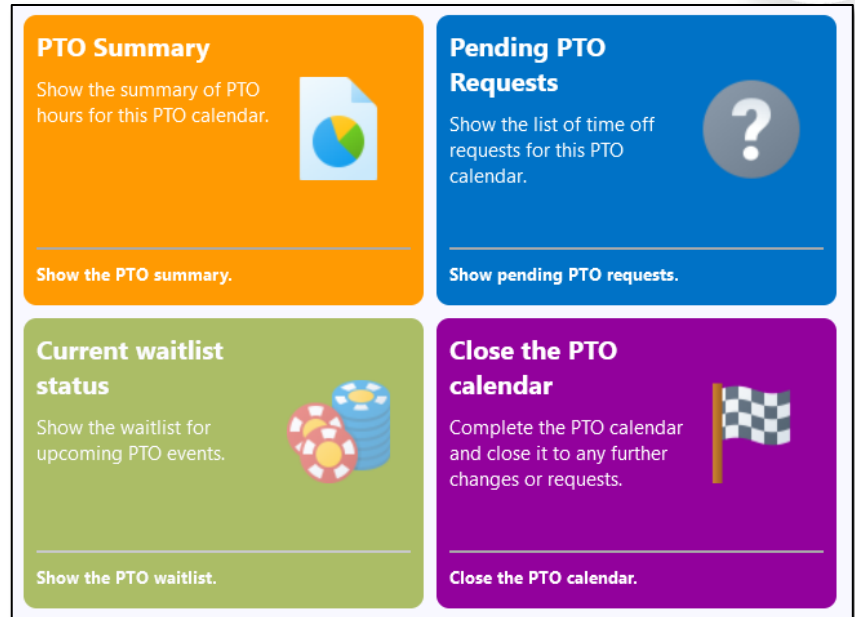


**PTO summary:** Click to refresh the graph at the top of this page and review the accrued hours, scheduled hours, and accrual balance for this calendar.

**Pending PTO requests:** Click to open the requests at the top of this page. Review any pending requests. You can validate the request if there are rules, and approve, deny, or delete the request.

**Current waitlist status.** View any existing waitlist items.

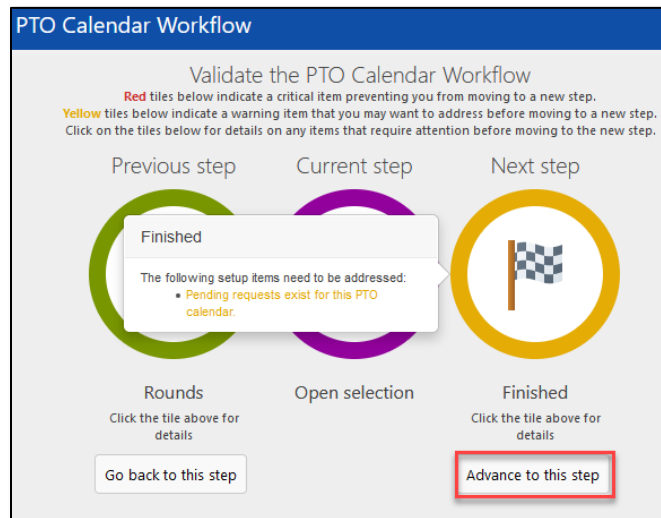
**Close the PTO calendar.** Open selection will continue until the calendar close date or until you manually close the calendar. Until the close date (or manual close), agents may continue to submit time off requests.



### Closing the calendar


When you are ready to close the calendar to any further changes, go to the *PTO Calendar overview*, select *Workflow navigation*, and review any remaining requests.

Click *Advance to this step*.





The calendar will close, and you cannot return to the Workflow navigation menu.







**Finished**  
The PTO calendar is closed to any further modifications, including time off rules and time off requests.



## Viewable time off calendar

To view the available time off calendar as an administrator, navigate to the calendar partition then select *Rules, Events & Available PTO* from the navigation pane.



**PTO Calendar Overview**

-  Properties
-  PTO Classifications
-  Participants
-  Workflow navigation


**PTO Calendar Extras**

-  Copy Calendar Wizard
-  **Rules, Events & Available PTO**

**PTO Calendar Reports**





-  PTO Calendar Accrual Report
-  PTO Calendar Transactions Report

Agents can view the calendar by navigating to a calendar partition then selecting *Available time off*.






**Areheart, Sam**  
Sales/Service Rep

**PTO Calendar overview options**

-  Overview
-  Time off rules
-  Time off bid rounds
-  **Available time off**

**PTO Calendar Reports**


-  PTO Calendar Accrual Report
-  PTO Calendar Transactions Report



**2024 Q1**  
2024 Q1


CALENDAR STARTS  
**Monday, 01 Jan 2024**

CALENDAR END  
**Tuesday, 31 Dec 2024**



**Open selection**  
The PTO calendar is open for participants to request time off, subject to the time off rule

**PTO Classification Summary**

PTO	Accrued hours	Scheduled hours	Balance
	136	16	120

Show details
Available time off

The color-coded calendar shows the likelihood of a request being approved.

Phone 877-668-6870

Web CommunityWFM.com,

3400 Waterview Parkway, Suite 325

Richardson, Texas 75080

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Clicking on a day opens details for that day.

CALENDAR STARTS  
Monday, 01 Jan 2024
CALENDAR END  
Tuesday, 31 Dec 2024
PTO CL  
1

### PTO Calendar Dates

January 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	01	02	03	04	05	06
07	08	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

**Available PTO daily detail**

The following details apply to the schedule date **Tuesday, 20 February 2024**

MAXIMUM AVAILABLE PTO HOURS:	8.00
TOTAL SCHEDULED HOURS:	8.00
LIKELY REMAINING HOURS OF PTO:	0.00
REMAINING FTES OF PTO TIME:	0.00
<b>PERCENTAGE OF ALLOCATED HOURS REMAINING:</b>	<b>0.00%</b>
BASED ON THIS DATA, YOU ARE <b>EXTREMELY UNLIKELY</b> TO HAVE TIME OFF APPROVED ON THIS DATE.	

## Waitlist

If an agent requests time off on a day with brownout rules, and there are already requests for the maximum amount of time for that day, the agent has the option to add themselves to a waitlist. If the time becomes available, the agent has the option to accept the time off and if necessary, can forfeit existing time off requests.

**Turn on the waitlist in the time off rules:** 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

- 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

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	Yes	Yes
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	Yes	Yes
7	Agent Hire Date Eligibility Delay Enforcement Rule		No	No	Yes	Yes	Yes	No	No
3	Agent Minimum Request Interval Rule		No	No	Yes	Yes	Yes	No	No
6	Agent Restricted Access Rule		No	No	Yes	Yes	Yes	No	No
8	Time Off Request in Calendar Partition Rule		No	No	Yes	Yes	Yes	No	No

**Customize a time off rule for a time off source**  
**Agent Brownout Date 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?  
Yes, allow users to enter a waitlist queue if this rule fails.

- 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 will 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.
- Requests on the waitlist have a Review status of *Denied* but 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 of time off	Review status	Waitlist status	Comments
N/A	N/A	28 Oct 2024	30 Oct 2024	PTO	PTO	24.00	Denied	Waitlisted	Yes. 2nd request for these days

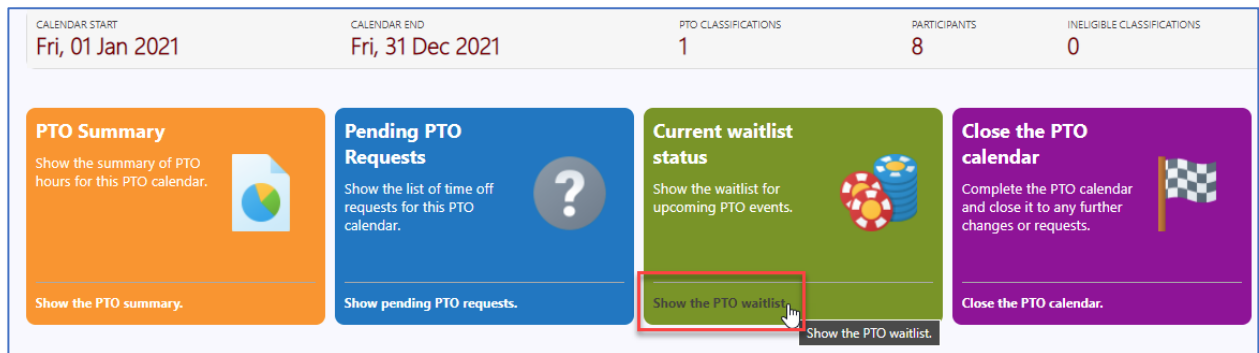
- When waitlist hours become available, the agent will receive a memo that waitlist hours are available and will need to go to their time off worksheet to accept or decline the hours.
  - The agent will need to have available accrued hours or be willing to give up future requests to accept the waitlist offer.



## View the waitlist | deny requests

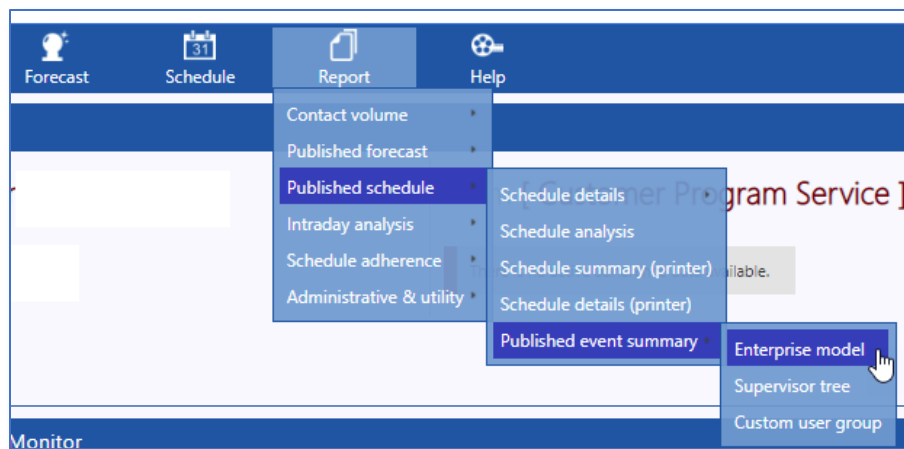
Plan > All things time off > PTO Calendars > Calendar partitions > [Calendar Partition Name]

In the *Current waitlist status* tile select *Show the PTO waitlist*. Any current waitlist items will appear at the top of the page. You can delete an agent’s request here. **Note:** If an administrator deletes a waitlist item, the agent will receive a notification that their request is denied and the status changes to *not waitlisted* on their *Upcoming time off* list.



## To approve, deny, or return to pending waitlist requests

Report > Published schedule > Published event summary > Enterprise model.





Select the date range and use the *Event type filters* to narrow the report to time off requests.

Published schedule event summary report by Activity **Community Enterprise Model**  
 Report from **01 Aug 2021** through **15 Oct 2021**  
 Report run time: 20 Aug 2021 06:14 am

Executive summary | Review status summary | Summary by date | Summary by event type | Summary by PTO classification | Summary by participant | **Show event details**

From the report options tabs, select *Show event details*. The far-right column has the buttons to manage the waitlist requests.

Report from date: 8/1/2021  
 Report through date: 10/15/2021

Reported summary data  
 Report type selection: Show event data summarized by a date value  
 What type of date value do you want to summarize?: Summarize by date

Event type filters  
 Restrict to a specific event type: PTO

An agent can remove themselves from the waitlist by going to their time off worksheet and selecting *Delete* in the *Pending & Upcoming requested time off* section. The agent can also revise previously selected hours to forfeit or remove themselves from the waitlist queue by opening the waitlist queue.

### Waitlist rules

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

To turn off the waitlist option, edit the rule setting and change *Configured for waitlist?* To *No*.

Choose a time-off rule source

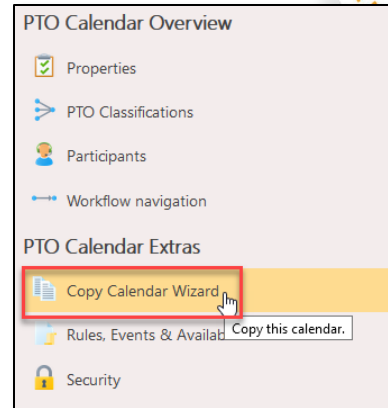
Time off rule ID	Name	Description	Editable?	Implied enforced?	Default Validate at runtime?	User enabled?	User Validate at runtime?	Eligible for waitlist?	Configured for waitlist?
5	Agent Accrued Hours Rule	Ensure the person has sufficient time off hours accrued prior to approving the time off request	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	Yes	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	Yes	Yes



## Copy calendar wizard

### Step 1: Choose what type of copy you want to make

You have two options when making a copy of a calendar: Make a **copy** with the same participants for a different date range, or **replicate** to keep the same date range but for a different group of people.



### Step 1: Choose what type of copy you want to make

#### Copy to another date range

Copy the calendar attributes to another date range. The copied calendar will have the same duration as the original. The end date will be based on the new start date and cannot be changed.

#### Replicate this PTO calendar

Copy the calendar attributes to the same date range, but with different participants. The copied calendar will have the same start and end date as the original.

### Copy to another date range

You can make other edits when customizing the calendar properties. Edits here do not affect the original calendar.

### Step 2: Customize the calendar properties

#### Preferred calendar status option:

- Same status as the source PTO calendar—
- Default to the basic properties status—

### Step 2: Customize the calendar properties

These are the basic properties of the current PTO calendar. You may elect to edit any of these values, but note that **only** the new copy or copies will have these values. The **original** PTO calendar will not change.

Preferred calendar status option

The new PTO calendar should have the same status as the source PTO calendar. ▾

The new PTO calendar should have the same status as the source PTO calendar.

The new PTO calendar should default to the Basic properties status.

**Name:** Default is "Copy of..."

**Calendar start date:** When you change the start date, the end date automatically adjusts so the number of days matches the original calendar. **You cannot change the duration of a calendar with a copy.**

**Include accrual transactions from days prior to start:** Refers to start of calendar. For example, if your calendar starts on January 3, 2022 (Monday of your work week), and your accruals begin on January 1, you would include transactions for 3 days prior to the start to make sure it includes those accruals.

**Ignore accrual transactions from days prior to end:** If the calendar ends on a date after additional accruals happen, you can tell the calendar to ignore the days at the end when additional accruals occur.

**Include prior accruals when validating bid round selections:** This will allow the calendar to include rollover hours (if allowed).

**Minimum role to view block selections:** Should agents be able to view other agent's requests by name/picture when making their bids? If not, select Supervisor or above. Agents will still be able to see which blocks have been selected, but the names and pictures are obscured.

**Ranking profile selection:** Employee rankings based your specified criteria. Seniority is a common example (ranking based on hire date). Agents must have a ranking profile included in the custom properties of their profile.

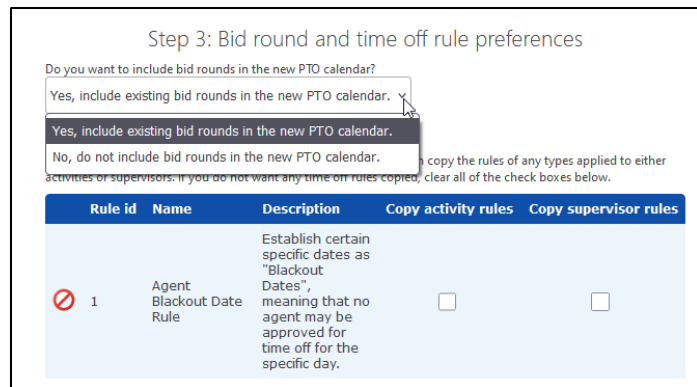
**Participant selection type:** Select bid round or open selection.

**Restrict PTO Classifications by shrinkage type:** Discretionary, non-discretionary, or both.

### Step 3: Bid round and time off rule preference

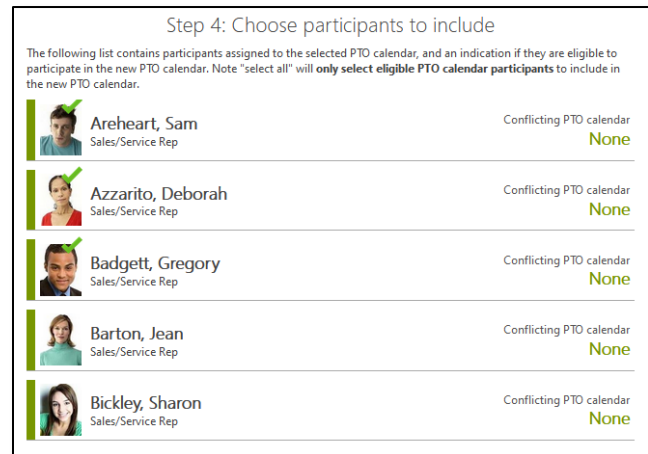
**Do you want to include bid rounds in the new PTO calendar?** Selecting Yes will include existing bid rounds in this calendar. If *No*, when you open the new calendar and go the Workflow navigation, you can change to open selection.

**Rules:** Review each rule and check the boxes for those you wish to copy to the new calendar. You may also *Select none* or *Select all*.



### Step 4: Choose participants to include

The list contains participants assigned to the selected PTO calendar, and indicates if they are eligible to participate in the new PTO calendar. Click on the participant's name to include them, or use the *Select all* or *Select none* buttons. **Note:** To include different participants, use the replicate calendar wizard.



### Step 5: Confirm the settings

Review all of the settings for your new calendar. If correct, click *Copy PTO calendar*. A copy is made in the background.

To view the new calendar, go to Plan > All things time off > PTO Calendars > Calendar partitions and select your new calendar.

## Replicate this PTO calendar

You can make other edits when customizing the calendar properties. Edits here do not affect the original calendar.

### Step 2: Customize the calendar properties

#### Preferred calendar status option:

- Same status as the source PTO calendar—
- Default to the basic properties status—

**Name:** Default is “Copy of...”.

If creating multiple copies, the name will include a copy number.

**Calendar start date:** Because this is a replication, you cannot edit the dates. To make a copy of the calendar with different dates, use the option to copy to another date range.

Step 2: Customize the calendar properties

These are the basic properties of the current PTO calendar. You may elect to edit any of these values, but note that **only** the new copy or copies will have these values. The **original** PTO calendar will not change.

Preferred calendar status option

Name

Description

Calendar start date

Calendar end date (inclusive)

**Include accrual transactions from days prior to start:** Refers to start of calendar. For example, if your calendar starts on January 3, 2022 (Monday of your work week), and your accruals begin on January 1, you would include transactions for 3 days prior to the start to make sure it includes those accruals.

**Ignore accrual transactions from days prior to end:** If the calendar ends on a date after additional accruals happen, you can tell the calendar to ignore the days at the end when additional accruals occur.

**Include prior accruals when validating bid round selections:**

This will allow the calendar to include rollover hours (if allowed).

**Minimum role to view block selections:**

Should agents be able to view other agent's requests by name/picture when making their bids? If not, select Supervisor or above.

Agents will still be able to see which blocks have been selected, but the names and pictures are obscured.

**Ranking profile selection:** Employee rankings based your specified criteria. Seniority is a common example (ranking based on hire date). Agents must have a ranking profile included in the custom properties of their profile.

**Participant selection type:** Select bid round or open selection. If the original calendar is in a bid round and you did not include bid rounds in your copy: after you finish creating the calendar, return to Plan > All things time off > PTO Calendars > Calendar partitions and open your new calendar. You will have the option to confirm that you wish to mark the calendar as open, select a date to close the calendar, and notify participants.

**Restrict PTO Classifications by shrinkage type:** Discretionary, non-discretionary, or both.

The screenshot shows a configuration form with the following fields:

- Include accrual transactions from days prior to start: 0
- Ignore accrual transactions from days prior to end: 0
- Participant selection type: Bid-round selection
- Include prior accruals when validating bid round selections: Yes, include accrual transactions from the effective calendar date range and any eligible beginning balance hours.
- Minimum role to view block selections: Agent
- Ranking profile selection: Seniority
- Restrict PTO classifications by shrinkage type: Use PTO classifications associated with Discretionary Shrinkage.

Buttons: Back, Next

**Step 3: Bid round and time off rule preference**

**Do you want to include bid rounds in the new PTO calendar?** Selecting Yes will include existing bid rounds in this calendar. If No, when you open the new calendar and go the Workflow navigation, you can change to open selection.

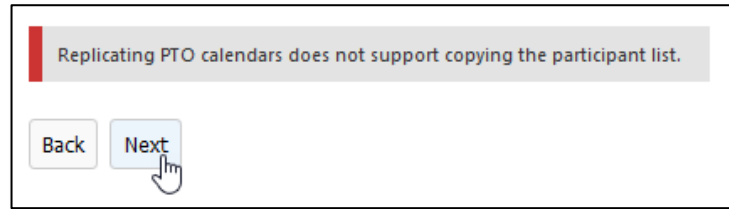
The screenshot shows a form titled "Step 3: Bid round and time off rule preferences". It contains two radio buttons for "Yes, include existing bid rounds in the new PTO calendar." and "No, do not include bid rounds in the new PTO calendar.". Below this is a table of rules with checkboxes for "Copy activity rules" and "Copy supervisor rules".

Rule id	Name	Description	Copy activity rules	Copy supervisor rules
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.	<input type="checkbox"/>	<input type="checkbox"/>

**Rules:** Review each rule and check the boxes for those you wish to copy to the new calendar. You may also *Select none* or *Select all*.

#### Step 4: Participants

You cannot copy the participants when replicating a calendar.



#### Step 5: Confirm the settings

Review all of the settings for your new calendar. If correct, click *Copy PTO calendar*. A copy is made in the background. To view the new calendar, go to Plan > All things time off > PTO Calendars > Calendar partitions and select your new calendar.