All Things Time Off
Adding New Agents

For Community Software Version 5.0+
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phone 877-668-6870
web CommunityWFM.com
3400 Waterview Parkway, Suite 101
Richardson, Texas 75080

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I have a new agent. Now what?

This document will guide you through the steps for configuring time off settings for new agents and adding accruals for use in requesting time off. This assumes that you have properly configured classifications, policies, and calendars (if using) for your center and have added the agent(s) to CommunityWFM.

Assign a PTO policy

Complete this step prior to adding time off accruals. The policy defines the accrual rules that will be used when generating accruals.

For one agent

1. Navigate to the agent's profile: Settings > People & agent templates > People > Current list > Personal profile > Time off settings (in Advance configuration section).
2. In the *PTO Policy* tile, select *Set up the PTO policy*.
3. In the pop-up window, select a policy from the drop-down menu.
4. Save.

   *If using calendar partitions, change the agents time off rules source while you are in their profile.

For multiple agents

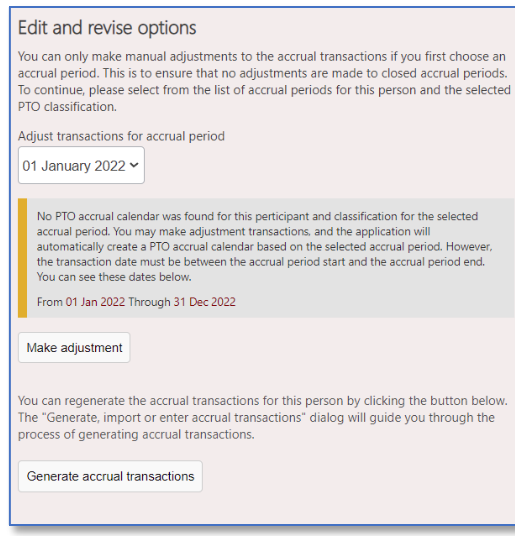
1. Navigate to Plan > All things time off > Time off settings > PTO policies.
2. Select the policy you wish to add people to.
3. Click *Set up policy participants* in the Participants tile.
4. Click *Add people*.
5. Choose the people you wish to include then click *Include selected*.
6. Close the *Choose participants* window.
7. Dismiss the *Currently assigned people* window.

Add accrued time

For one agent

This process will add time to a published accrual.

1. Navigate to the agent's profile.
2. Click *Configure time off settings*.
3. Click the PTO Classification Summary tile that you wish to add time for.
4. In the Published accrual summary report, select *Show options* (upper right) to launch the report options window.
5. Select the accrual period if different from the default (current year).



6. Click *Make adjustment* to manually add accruals for this agent of if using an accrual schedule (based on hire date/years of service) or uploading via an Excel worksheet, click *Generate accrual transactions*.

Make adjustment

a. Select an *Adjustment date*.

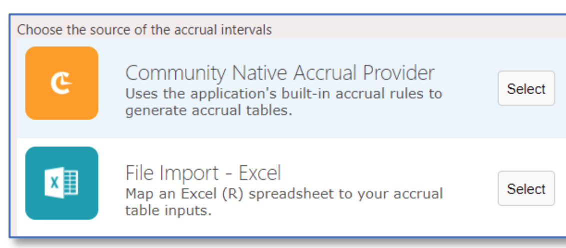
b. Enter the *Adjustment hours*.

c. Enter a *Transaction comment* (e.g., New Hire).

d. Select a *Reason or transaction type* (e.g., manual adjustment).

e. Click *Save adjustment*.

Generate accrual transactions



Select the source for accrual transactions.

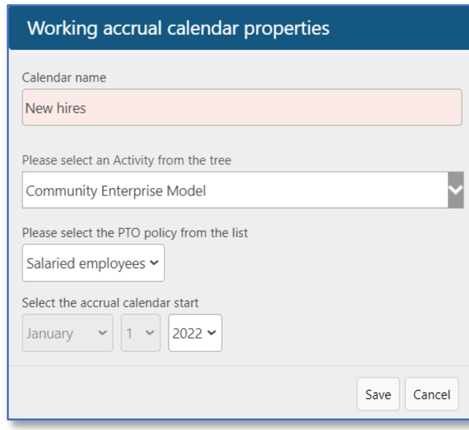
Community Native Accrual Provider: If using the Community Native Accrual Provider, it will add the hours to the agent's accrual when you click "Select." The accrual with this method is based on the **year** of hire as does not account for months/days. If the new agent is hired mid-year, you will need to make a manual adjustment to subtract hours accrued prior to the actual hire date.

Excel Import: If using Excel, follow the wizard to upload accruals via a spreadsheet.
Reminder: The format of the Excel is critical, and the employee ID and Classifications must match exactly to successfully import the data.

For multiple agents

To create accruals for multiple agents, create a new working accrual calendar for the new agents.

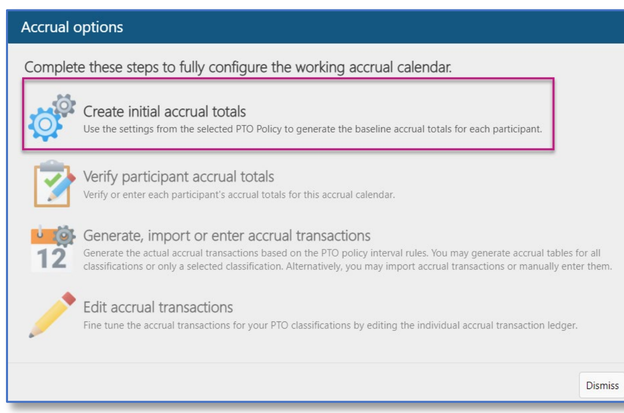
Navigate to Plan > All things time off > PTO Calendars > Working accrual calendars > *Click here to create a new working accrual calendar.*



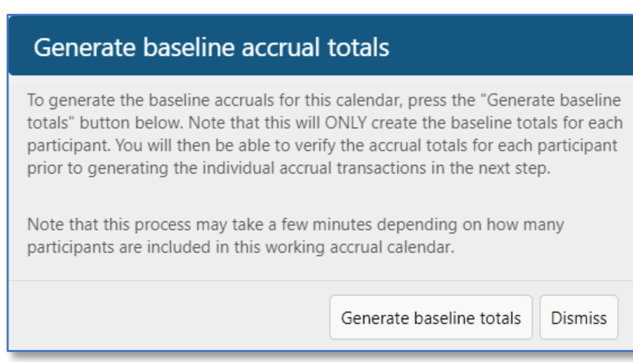
1. Enter a name and select the Activity.
2. Select the PTO policy.
3. Select the accrual calendar start if different from current year.
4. Save.

In the Accrual tables tile, click *Set up and manage accrual tables.*

1. Click *Create initial accrual totals.*



2. In the pop-up, click *Generate baseline totals*. If you plan to upload using Excel, this will create a placeholder in the table for the accruals.
3. When complete, click *Dismiss* to close the pop-up.



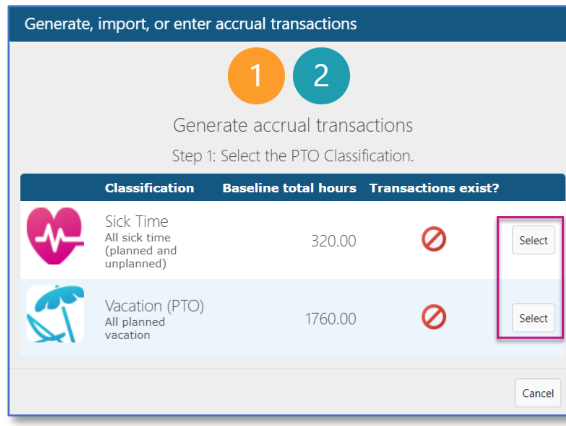
4. Click *Verify participant accrual totals.*

5. Review and verify the individual totals or select *Bulk edit* to verify all. **Note:** While this shows all people in the Activity who are included in the policy, it will generate totals only for the new people added to the policy.

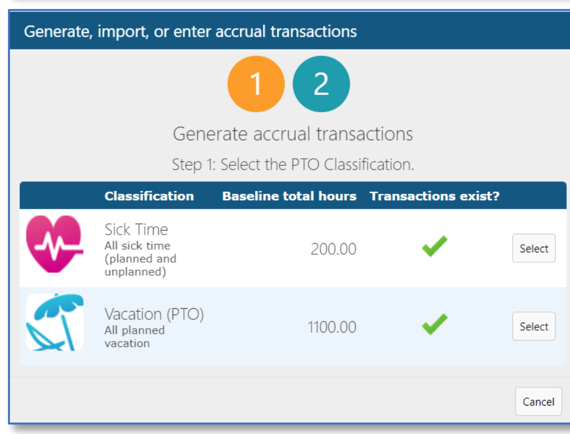
6. After verifying, close the window.

7. Click *Generate, import, or enter accrual transaction* to generate the verified accrual totals to the agents.

8. For each classification, click *Select.*



9. After generating all accrual transactions, (green check marks), click *Cancel* to close the pop-up.



10. In the Report and Publish tile, click *Show the report and publish options dialog.*

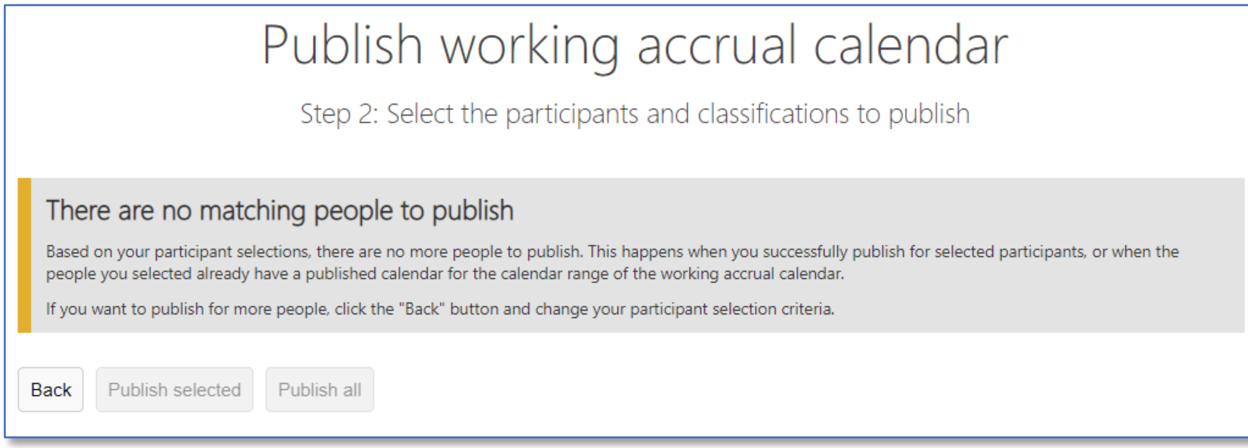
11. Click *Publish the working calendar.*

12. Check the box to indicate your understanding that the accruals cannot be "unpublished."

13. Click *Next.*

14. Publish the accruals for all or a selected group.

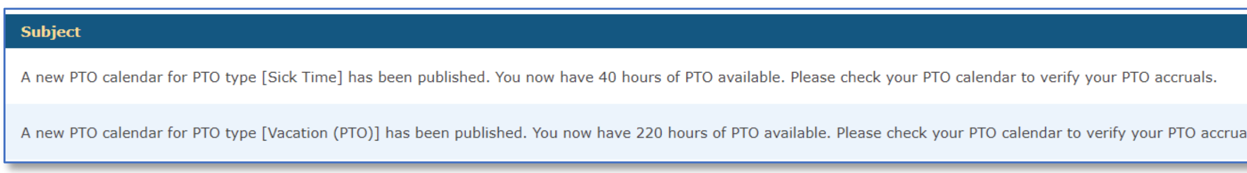
The next screen will show that there are no matching people to publish because you just published them.



15. Close the pop-up.

16. Dismiss the *Report and publish options* pop-up.

17. After publishing, agents will receive a memo with the classification and number of hours.



Change an agent's time off rules source

If you are using calendar partitions (for either bidding or open selection), change the agent's rules source to *Calendar partition rules*. (**Reminder:** You can't add new agents to an ongoing bid calendar).

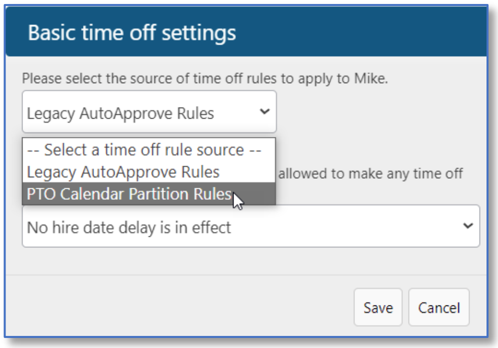
Note: To convert a large group of agents to calendar partition rules, contact your support desk.

1. Navigate to Settings > People & agent templates > People > Current list > *Personal profile* > Time off settings (in Advance configuration section).

2. Click *Configure time off settings.*

3. In *General time off settings* click *Configure basic settings.*

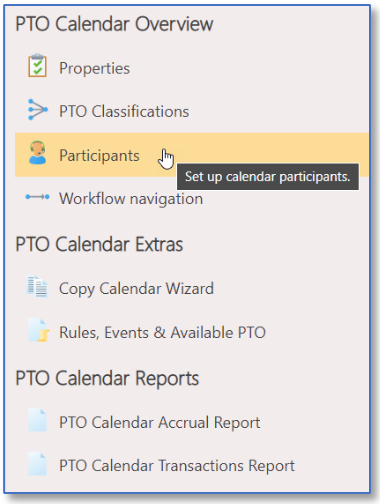
4. In the pop-up window, select *PTO Calendar Partition Rules* from the drop-down.



5. Select if there is a hire date delay for time off requests. If *Yes,* enter the expiration date for the hire date delay.

6. *Save.*

Add agents to a calendar partition



1. Navigate to Plan > All things time off > PTO Calendars > Calendar partitions.

2. In the navigation pane under PTO calendar Overview select *Participants.*

3. Click *Add people.*

4. Select how to choose participants (e.g., by Activity, Supervisor Group, Custom User Group).

5. Click *Choose people.*

6. Select the people to add to the calendar then click *Include selected.*

7. Close the window.