



# All Things Time Off Adding New Agents

For Community Software Version 5.0+  
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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 or if using an accrual schedule (based on hire date/years of service) or uploading via an Excel worksheet, click *Generate accrual transactions*.

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 2022

No PTO accrual calendar was found for this participant and classification for the selected accrual period. You may make adjustment transactions, and the application will automatically create a PTO accrual calendar based on the selected accrual period. However, the transaction date must be between the accrual period start and the accrual period end. You can see these dates below.

From 01 Jan 2022 Through 31 Dec 2022

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

### 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.

Choose the source of the accrual intervals

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



**Excel Import:** If using Excel, follow the wizard to upload accruals via a spreadsheet.

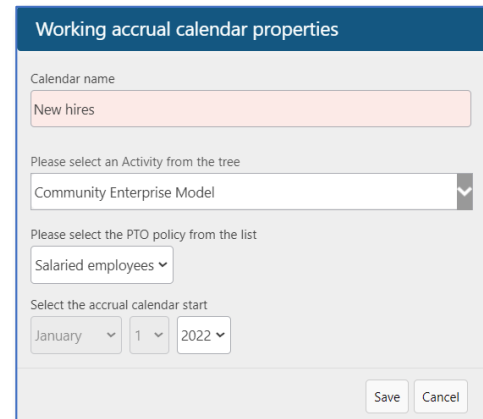
**Reminder:** The format of the Excel is critical, and the employee ID and Classifications must match exactly to successfully import the data.

## 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.



**Working accrual calendar properties**

Calendar name  
New hires

Please select an Activity from the tree  
Community Enterprise Model

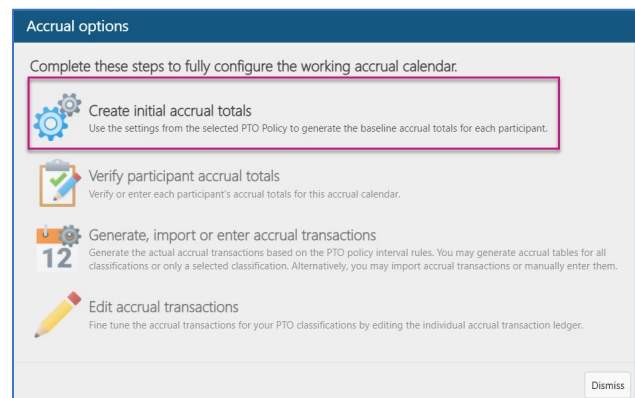
Please select the PTO policy from the list  
Salaried employees

Select the accrual calendar start  
January 1 2022

Save Cancel

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

1. Click *Create initial accrual totals.*



**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.

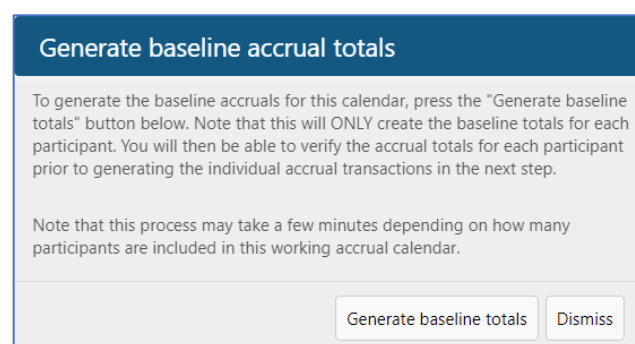
**Verify participant accrual totals**  
Verify or enter each participant's accrual totals for this accrual calendar.

**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

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.



**Generate baseline accrual totals**

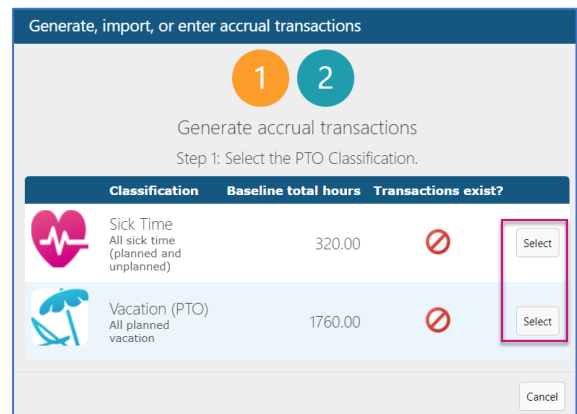
To generate the baseline accruals for this calendar, press the "Generate baseline totals" button below. Note that this will ONLY create the baseline totals for each participant. You will then be able to verify the accrual totals for each participant prior to generating the individual accrual transactions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

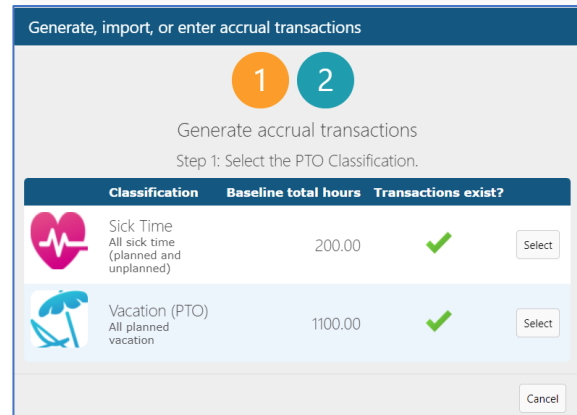
4. Click *Verify participant accrual totals*.
5. Review and verify the individual totals or select *Bulk edit* to verify all. **Note:** While this shows all people in the Activity who are included in the policy, it will generate totals only for the new people added to the policy.
6. After verifying,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



| Classification                                                                                                                       | Baseline total hours | Transactions exist?                                                                 |                                       |
|--------------------------------------------------------------------------------------------------------------------------------------|----------------------|-------------------------------------------------------------------------------------|---------------------------------------|
|  Sick Time<br>All sick time (planned and unplanned) | 320.00               |  | <input type="button" value="Select"/> |
|  Vacation (PTO)<br>All planned vacation             | 1760.00              |  | <input type="button" value="Select"/> |

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



| Classification                                                                                                                         | Baseline total hours | Transactions exist?                                                                   |                                       |
|----------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------------------------------------|---------------------------------------|
|  Sick Time<br>All sick time (planned and unplanned) | 200.00               |  | <input type="button" value="Select"/> |
|  Vacation (PTO)<br>All planned vacation             | 1100.00              |  | <input type="button" value="Select"/> |

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.

## Publish working accrual calendar

Step 2: Select the participants and classifications to publish

**There are no matching people to publish**

Based on your participant selections, there are no more people to publish. This happens when you successfully publish for selected participants, or when the people you selected already have a published calendar for the calendar range of the working accrual calendar.

If you want to publish for more people, click the "Back" button and change your participant selection criteria.

Back
Publish selected
Publish all

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.

| Subject                                                                                                                                                                   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A new PTO calendar for PTO type [Sick Time] has been published. You now have 40 hours of PTO available. Please check your PTO calendar to verify your PTO accruals.       |
| A new PTO calendar for PTO type [Vacation (PTO)] has been published. You now have 220 hours of PTO available. Please check your PTO calendar to verify your PTO accruals. |

## Change an agent's time off rules source

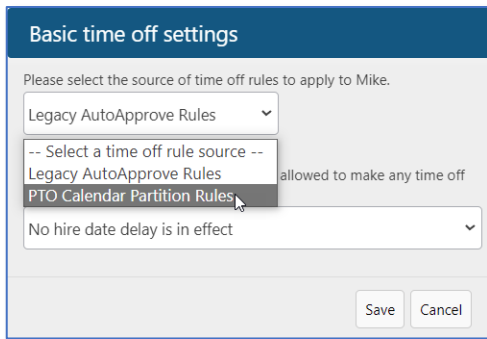
If you are using calendar partitions (for either bidding or open selection), change the agent's rules source to *Calendar partition rules*. (**Reminder:** You can't add new agents to an ongoing bid calendar).

**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*.



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



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

## Add agents to a calendar partition

- Navigate to Plan > All things time off > PTO Calendars > Calendar partitions.
- In the navigation pane under PTO calendar Overview select *Participants*.
- Click *Add people*.
- Select how to choose participants (e.g., by Activity, Supervisor Group, Custom User Group).
- Click *Choose people*.
- Select the people to add to the calendar then click *Include selected*.
- Close the window.

