MT SaaS WFM

Request Management

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Contents

About this guide

This guide discusses Workforce Management Request Management features from the perspective of a Workforce Management administrator, manager, and scheduler.

Intended audience

This guide is designed to be used by administrators of the Workforce Management portion of the Workforce Optimization Solution. Users are expected to be experienced in working with contact center equipment and software applications as well as PC workstation hardware and software.

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Document revision history

Revision	Description of changes
1.05	Updates for V15.2 HFR6 0610: • In the *Setting up time-off requests* chapter - In the *Time-off request settings* topic, added a new setting: Add to Waitlist option selected by default for Time Off Requests. - In the *Time-off validation request rules* topic, updated the name and description of the rule that validates net staffing improvement. • In the *Setting up shift requests and changes* chapter, the *Shift request & changes validation rules* topic, the name and description of the rule that validates net staffing improvement was updated. • In the *Running a shift bidding auction* chapter, updated the topic: *Update schedules in an auction* to *Update an auction schedules and employee list*.
1.04	Updates for V15.2 HFR6: • In the *Setting up time off request* chapter, added the following topic: *Delete a reference schedule for one or more employees.*
1.03	Updates for V15.2 HFR5: • Added a new chapter about Auto breaking rules. These rules specify where non-work shift events are automatically placed when a request adds or removes time from a shift is approved. • Changes to the Request Management Settings page: - Time Off Request Options: A new setting was added to default the From time and To time in the Select Date Range box to Hours of Operation instead (instead of 12 AM and 11:59 PM). - Shift Requests and Change: A new setting was added to control whether employees can change the start time of existing shifts. - Added a section for the new Auto breaking feature. The setting works with auto breaking rules for time off requests. • When importing daily time off hours, blackout days can be imported. • On the Auction Settings page, added the setting Continuous Bid. This setting used with the Include Previously Schedule Employee setting creates a continuous bid aution. These auctions are available for two auction types: Combination of Individual Shifts and Multiple Shifts per Day.
1.02	Updated the following topics with more information about the different auction shift bid types: • Submit one shift bid request at a time for an employee • Submit multiple shift bid requests for an employee • Auction shift bid types

Revision	Description of changes
1.01	Updates for V15.2 HFR4: • The *Setting up shift requests and changes* chapter was updated with content for the following feature: Employees can request to withdraw an approved shift request & change. Content includes validation rules, filing rules, and autoprocessing rules. • The *Setting up shift bidding requests* chapter was updated with content for the following feature: Administrators can create shift bid auctions for the current schedule period for two shift bid auction types: Combination of Individual Shifts option and Multiple Shifts per Day option. Content updates include changes on the Schedule Auction Settings page and the Bid Options page.
1.00	Initial publication.

Introduction to Request Management

Request Management provides many options for automating the employee request process and managing employee requests.

With Request Management, you can set up and manage the following:

- Time-off requests
- Flex time requests
- Shift swap requests
- Shift bid requests
- Shift requests and changes
- Time-off bids for vacation
- Shift bid auctions

Topics

Request Management overview

As part of the Workforce Management (WFM) solution, Request Management provides a way to manage employee requests that provides benefits to both management and employees.

- Management productivity can increase by automating many routine administrative tasks and providing employees with self-service capability for requests. Managers and supervisors can spend extra time focusing on more critical areas such as coaching and performance-related tasks.
- Employees can feel more empowered and have greater job satisfaction because they participate in the workforce management process from their desktops. For example, they can access their schedule information, view the time-off calendar, submit their requests, view request status, and conflict information if any.

Time off

Employees can view time off availability, submit, withdraw, and track requests for time-off days and partial days, and receive conflict and request status information. They can request time off down to 15-minute increments. If employee requests cannot be approved due to insufficient hours in the time-off allotment, requests can be put on a waitlist.

After a time-off event is approved, an employee can opt to withdraw this request. If approved, the hours used from the time-off allocation are replaced and made available to other employees. The system checks for requests on the time-off wait list.

Flex time

Flex time requests allow employees to request time-off with associated make-up time instead of having time deducted from their time-off accrual.

Employees can do the following:

- Submit a request for time-off before the makeup time. For example, an employee can request to make up for a late arrival by adding an extension to the end of the shift instead of being marked late.
- Submit a request for makeup time before the time-off. For example, an employee can request to work extra time in advance to avoid taking time-off for an upcoming appointment.

Shift swap

Shift swapping efficiently enhances the flexibility of schedules without sacrificing service levels or quality.

Employees can swap either a shift or nonwork time using the following options:

- Post a shift swap on the online swap board. The posting is listed for others to view and, when interested, accept the posting to negotiate the swap.
- Send a swap request to a specific employee.

After a shift swap is approved, an employee can withdraw their request if needed.

Shift requests and changes

Shift requests and changes allow employees to submit requests for new shifts, to work overtime, and to extend or shorten an existing shift.

In addition, depending on how you configure the Workforce Management system, the requests can be approved or rejected automatically based on net staffing requirements you define to ensure shift coverage.

Shift bidding

Employees can identify and submit bids for the shifts that they want during an online auction. A set of rules can be set up to process the bids. Assignment of shifts is based on seniority, performance or rank, and unique discretionary points awarded by managers to employees. These points reward employees for hard work and superior performance.

Schedulers can start the auction by naming the shift period available for bidding, setting a deadline for the bids, and defining the scoring system. You can add all employees to the bid at the same time or one at a time according to a specified order such as seniority or rank.

Employees can view the available schedules and see their bid positions. They can filter shifts available for bidding using multiple criteria, and then sort and subsort on multiple columns to narrow down their search for shifts they want to bid on. Then, they rank their shift bids. Employee can use their bonus points to give them a greater chance of getting desired shifts. They can also add comments to their bids at the same time. After they submit their bids, the application automatically sorts them by seniority, rank, bonus points, performance rankings, and shift preferences.

Supervisors can view employee comments and then approve the bids, either all at once or individually. Then, with a click, they can fill the schedule and send it to the employees' desktops.

Time-off bidding for vacation

Time-off bidding automates the vacation bidding process which is typically held for the next calendar year.

When administrators create a time-off bid, they set the period that employees can submit bids, period that employees can request time-off for vacation, minimum and maximum period that can be included in a time-off choice, and the maximum period that can be approved. The time-off approval limit can be set to one amount for all employees or to different amounts for employees.

During the bid period, employees submit time-off requests with their vacation choices for the bid request period.

Management can use a filter can be used to view only requests from a specific bid. Time-off bids can be processed individually or as a group. Multiple choices from a request can be approved with the group processing options.

Employees can be given the option to copy unapproved choices in a time-off request to a new time-off bid.

Chapter 2

Defining shared request settings

Shared request settings are optional settings that are effective for all request types. Use these settings to define Employee Workflow Option, track Minimum Hours per Pay Period, and change how auto breaking rules manage unpaid breaks for time off requests.

Topics

Define settings shared by all request types

While most Request Management settings are specific to one type of request, several optional settings are effective for all request types.

- **Employee Workflow Options settings**: Determine whether employees can escalate denied requests, view auto-processing rules, and view schedules of specific organizations.
- **Required Pay Period Hours settings**: If you want to track minimum hours per pay period for employees, these settings must be completed as part of the feature setup.
- **Auto Breaking settings**: This setting only applies to time off requests, and is selected by default. It ensures that after a time off request is approved, the employee's paid time does not exceed the paid time prior to the request.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Optional: Define the following settings:
   - Employee Workflow Options settings
   - Required Pay Period Hours settings
4. Optional: Change the following setting:
   - Auto Breaking
5. To save these settings, do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Shared request settings, page 15

Shared request settings

Shared request settings are optional settings that are effective for all request types.

Employee Workflow Options

Setting	Description
Allowed escalation of denied requests	Determines whether employees can escalate a denied request for further consideration. If selected, employees have an action button available next to the denied request. This button sends the request to a manager who has privileges to decide on the disposition of escalated requests.

Setting	Description
Show auto processing rules to employees.	If selected, employees can see the autoprocessing rules set for their organization on the **Policies** page. This page is located on My Home, under My Requests.
Limit employees' schedule viewing to the following organizations	If employees have privileges to view group schedules, determines whether schedules of these specific organizations are shown to employees.

Required Pay Period Hours

Setting	Description
Track Required Pay Period Hours by	If this check box is selected, the required minimum hours per pay period are tracked.
Pay Period	Identifies the pay period frequency. Match the frequency in your payroll system.
Start Date	Identifies the date that the pay period starts. This start date must be a date that going forward synchronizes to the pay period date range in your payroll system.

Start Date is 01/01/2017

When the Pay Period is...	Then the next pay period starts on...
weekly	01/08/2017
bi-weekly	01/15/2017
monthly	02/01/2017

Start Date is 02/17/2017

When the Pay Period is...	Then the next pay period starts on...
weekly	02/24/2017
bi-weekly	03/03/2017
monthly	03/17/2017

Additional setup requirements before Minimum Pay Period Hours can be tracked:

- The Required Pay Period Hours value must be defined for users in the organization on the **Work Rules** page. This page is located on **User Management**, under **Employees**.
- For time-off activities, one or more absence activities must be set up to apply to the Required Pay Hours balance. Activities are set up on the **Activities** page. This page is located on **Work Administration**, under **Activities**.
- The Request Complies with Required Pay Period Hours validation rule must be set. This rule is available for three types of requests: time-off requests, shift swap requests, and shift request and changes.

Auto Breaking settings

Setting	Description
Move unpaid breaks under time off for shift length optimization.	Auto breaking rules for time off requests use this setting. It ensures that after a time off request is approved, the employee's paid time does not exceed the paid time before the request.

Related topics

Recommended workflow: Set up time-off requests, page 19
Recommended workflow: Set up flex time requests, page 65
Recommended workflow: Set up shift bidding requests, page 77
Recommended workflow: Set up shift swap requests, page 89
Recommended workflow: Set up shift requests & changes, page 108
Create an auto breaking rule , page 131

Related information

Organization Activity Details (*Workforce Management Administration Guide*)

Setting up time-off requests

With time-off requests, employees can request various types of time-off such as paid time-off, voluntary or unpaid time-off, and sick time.

For submitted requests, you can do the following:

- Approve and deny time-off requests
- Approve and deny withdrawal of approved time-off requests
- Approve and deny waitlisted time-off requests
- Withdraw approved time-off requests on the behalf of employees
- Waitlist denied time-off requests on the behalf of employees

Topics

Recommended workflow: Set up time-off requests

Set up time-off requests to manage various types of time-off such as paid time-off, voluntary time-off, and sick time.

This workflow describes the procedures for setting up time-off requests and using all system features. Follow the procedures that fit the needs of your organization.

Workflow

1. Define settings shared by all request types, page 15

   While most Request Management settings are specific to one type of request, several optional settings are effective for all request types.

2. Define settings for time-off requests, page 21

   Time-off settings determine the workflow for both managers and employees, time-off request options, time-off accrual, and time-off calendar colors.

3. Create policies for time-off requests, page 24

   Time-off request policies provide guidance to employees about submitting requests. Employees can view all request policies on the Policies page (on the My Request menu.)

4. Define validation rules for time-off requests, page 25

   Validation rules verify that requests meet the conditions that you specify. Rules can be defined for both time-off requests and approved time-off withdrawal requests. The validation rules that you set for a request type are available as criteria for auto-processing rules.

5. Create filing rules.

   - Create a filing rule for time-off requests, page 29

     You can create a filing rule to specify when time-off request must be submitted. When time-off requests are submitted, a validation rule verifies that the requests comply with the filing rule for the time-off type in the request.

   - Create a filing rule for approved time-off withdrawal requests, page 32

     You can create a filing rule to specify when approved time-off withdrawal requests must be submitted. When these requests are submitted, a validation rule verifies that these requests comply with the filing rule.

6. Create autoprocessing rules.

   - Create an autoprocessing rule for time-off requests, page 34

     Instead of processing time-off requests manually, you can save time by creating an autoprocessing rule. The system uses this rule to approve, waitlist, and deny requests that violate time-off request validation rules.

   - Create an autoprocessing rule for approved time-off withdrawal requests, page 38

     While approved time-off withdrawal requests can be processed manually, you can set up a rule for the system to process them automatically. An autoprocessing rule can be used to approve and deny requests based on the validation rules that you set.

7. Create a special day, page 41

   Special days, such as holidays, can be added to an organization's time-off calendar. Employees can view the non-working holidays and working holidays when planning their time-off requests.

8. Create a time-off pool, page 45

Create a time-off pool to define how much time can be taken off for a specific time period. A time-off pool can have time-off allocations for each day, segments of each day, or both.

9 Assign employees to a time-off pool and allocate time-off hours, page 57

Assign a time-off pool and allocate time-off hours to any employee in an organization with time-off types (activities) that are set up to deduct from a time-off pool and are used in requests.

Define settings for time-off requests

Time-off settings determine the workflow for both managers and employees, time-off request options, time-off accrual, and time-off calendar colors.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Define the Time Off organization settings:
   - Time Off Management Activation
   - Time Off Request Options
   - Time Off Accrual
   - Time Off Calendar Colors
4. To save these settings, do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Time-off request settings, page 21
Recommended workflow: Set up time-off requests, page 19

Time-off request settings

Time-off settings define options and set requirements in time-off requests submitted by employees in an organization.

Location

Go to **Organization Management**. Under **Request Management**, select **Settings** page.

Time Off Management Activation

Setting	Description
Activate Manager Workflow	Determines whether *managers* in the selected organization can view and act on time off requests from their employees. It also enables managers to access the Time Off Calendar.
Activate Employee Workflow	Determines whether *employees* in the selected organization can view, create, and edit time off requests. It also enables employees to access the Time Off Calendar.

Time Off Request Options

Setting	Description
Time Off Rounding Options	Specifies a rounding option for time-off requests. When a request is saved, the time is rounded up or down, depending on what time is closest to the selected rounding option. Options: • **Round to the nearest 1-minute interval**: Rounds to the nearest minute of a submitted employee request. Example: If an employee submits a request for 9:01 AM and 55 seconds to 11:52 AM and 3 seconds, the request is rounded to 9:02 AM to 11:52 AM. • **Round to the nearest 15-minute interval** (default): Rounds to the nearest 15-minute interval of a submitted employee request. Example: If an employee submits a request for 12:53 PM to 4:27 PM, the request is rounded to 1:00 PM to 4:30 PM. • **Round to the nearest 1-hour interval**: Rounds to the nearest 1-hour interval of a submitted employee request. Example: If an employee submits a request for 5:55 PM to 9:10 PM, the request is rounded to 6:00 PM to 9:00 PM. • **Round to the nearest 1-day interval**: Rounds to the nearest 1-day interval of a submitted employee request. Example: If an employee submits a request for 9 AM, it is rounded to 12 AM of the *same* day. If an employee submits a request for 2 PM, it is rounded to 12 AM of the *next* day.
Maximum Allowed Time Off Choice(s) Per Request	Specifies the maximum number of time-off choices that can be made per time-off request.
Allow Time Off Bid request to be copied	If selected, employees can pre-populate choices in a new time-off bid request with choices that were not approved in a previous time-off bid. Comment History is not pre-populated. On My Request page, a copy icon is displayed in the Actions column for a request when it meets all of the following conditions: • Is from a closed bid. • Has the status of pending or closed. • Has choices that can be approved. This feature is not available on the Employee Request page.
Use hours of operation for Time Off Requests	If selected, the **From time** and **To time** in the **Select Date Range** box defaults to the organization's hours of operation (instead of 12:00 AM and 11:59 PM).

Setting	Description
Add to Waitlist option selected by default for Time off Requests	When selected, the Time Off request form option **Add to Waitlist if not Approvable** is selected by default.

Time Off Accrual

Setting	Description
Time Off Year	Determines the boundary of the year for time-off requests: • **Employee Anniversary date**: Boundary of the year for time-off requests is determined by the start date of the employee at the company. This anniversary date is used as the accrual schedule for all activities that accrue on a yearly schedule. • **Fixed date**: Boundary of the year for time-off requests is determined by this specific date. This date is used as the accrual schedule for all activities that accrue on a yearly schedule.
Accrual Day of Month	Day of the month used as the accrual schedule for all activities that accrue on a monthly schedule.
Accrual Day of Week	Day of the week used as the accrual schedule for all activities that accrue on a weekly schedule.

Time Off Calendar Colors

The time-off calendar uses different colors to identify types of days and whether time off hours are available. You can change any of the default colors.

Example: By default, red is the color for blackout days. You can change the color for blackout days to black.

Related topics

Define settings for time-off requests, page 21

Create policies for time-off requests

Time-off request policies provide guidance to employees about submitting requests. Employees can view all request policies on the Policies page (on the My Request menu.)

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Under the **Time Off Management Policies** section, type the information you want employees to know about submitting shift bid requests.
4. To save, do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Time-off policies, page 24

Recommended workflow: Set up time-off requests, page 19

Time-off policies

Text box to type information that you want employees to know about submitting time-off requests. Employees can view your policies on the **Policies** page. This page is located on **My Home**, under **My Requests**.

Location

Go to **Organization Management**. Under **Request Management**, select **Settings**.

Related topics

Create policies for time-off requests, page 24

Define validation rules for time-off requests

Validation rules verify that requests meet the conditions that you specify. Rules can be defined for both time-off requests and approved time-off withdrawal requests. The validation rules that you set for a request type are available as criteria for auto-processing rules.

Each validation rule has an icon. When a request violates a validation rule, the icon is displayed on the following pages:

- **Employees Request**: Employees that manage requests submitted by others use this page.
- **My Request**: Employees manage their own requests from this page.

Rules for time-off type

By default, time-off request validation rules are set for all time-off types (activities). When you define these rules, you can choose a different set of rules for each time-off type.

An (*) asterisk displays on the left of a rule check box when a rule applies to some, but not all, activities in an organization.

Example: All time-off activities have validation rule 1 set. Activity B has rule 1 and rule 2 set. An asterisk is displayed next to rule 2.

No changes are made to the time-off type activities associated with these rules when you save. If you want to make these rules apply to all activity types, modify the Time Off Validation rule settings to remove the asterisk from them.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Validation**.
2. In the left pane, select an organization.
3. Optional: To apply validation rules to an activity type, do the following:
   a. Under the **Time Off Request Validation rules** section, in the **Time-off type** list, click an activity.
   b. To add more time-off types, press Ctrl and click another activity type.
4. To define the validation rules that you want to use.
   a. Select the check box.
   b. When needed, complete the rule values (Example: number of minutes, hours, or days).
5. Under the **Approved Time Off Withdrawal Validation rules** section, select the check box.
6. To save, do one of the following:
   - Click **Save**.
   - Click **Save and Apply to Sub-Orgs**.

Related topics

Time-off request validation rules, page 26

VTO options request validation rules, page 28

Approved time-off withdrawal validation rules, page 28

Recommended workflow: Set up time-off requests, page 19

Time-off request validation rules

Use any of these validation rules to set conditions that you want validated in time-off requests. You can specify rules for a specific activity.

Time off type list

This list lets you select validation rules for all activity types or a specific activity type. The default is **All**.

The list includes all activities created for the organization with the **Used in Requests** option. This option is set on the **Activities** page. This page is located on **Work Administration**, under **Activities**.

Validation rules

- **Time Off Pool has available time off hours.** This rule is violated if the total length of scheduled time-off events for all employees during the requested day(s) is greater than the number of hours entered in either the Daily Pool or the Interval Pool or both time-off pools depending on the setup of the Time Off Activity selected for the request.

  Hours for the Daily Pool and the Interval Pool are entered on the **Time Off Pools** page. This page is located on **Organization Management**, under **Request Management**.
- **Request avoids blackout days for the Time Off Pool.** This rule is violated if the request covers a day marked as a blackout day.

  Blackout days are marked on the **Time Off Pools** page. (This page is located on **Organization Management** under **Request Management**, in the section Enter Allocated Time Off hours into calendar and mark blackout days.)
- **Employee has enough time off hours.** This rule is violated if the total length of scheduled time-off events for this employee during the schedule of accrual exceeds the allotment. (Employees can accrual on different schedules such as daily, weekly, monthly.)

  The allotment is entered on the **Time Off** page. This page is located on **User Management**, under **Employees**. Time Off year may be either the employee anniversary year or a calendar year, as configured on the page.

  This validation rule takes into account the number of hours accrued by an employee as of the request target date.
- **Request complies with filing rules.** This rule is violated if the request submittal date violates any of the filing rules applicable to the employee's organization.
- **Requested time off is not being swapped.** This rule is violated if one or more request choices overlaps a shift that will be received from a pending shift swap request (state of shift swap request is either pending, in negotiation or escalated).
- **Scheduled calendar event activities that the request avoids**: <**All** or a specific calendar event>**.** This rule is violated if the requested time off period overlaps with the selected scheduled calendar event.
- **Minimum duration of the request:** <*number*> <**Minutes, Hours,** or **Days.**> This rule is violated if the request duration (end date - start date) is not at least the specified minimum. The minimum can be expressed in units of **Minutes**, **Hours**, or **Days**.
- **Maximum duration of the request:** <*number*> <**Minutes, Hours**, or **Days.**> This rule is violated if the request duration (end date - start date) exceeds the specified maximum. The maximum can be expressed in units of **Minutes**, **Hours**, or **Days.**
- **Requested time off is for a past date.** This rule is violated any time a request is created for a start date earlier than the creation date of the request.

- **A minimum of**<*x*> **percent of changed intervals improves net staffing.** This rule is violated when the percentage of intervals that will be changed by the request is less than the specified minimum percentage for net staffing improvement.

  The minimum staffing level percentage is calculated as follows:

  Improvement Percentage = (#periods where net staffing is improved / (#periods where net staffing is improved + #periods where net staffing is worsened))*100
- **Request complies with employee's maximum VTO per day/week.** This rule is violated if approval of the request results in the employee exceeding his maximum VTO hours per day / week.
- **Request complies with Required Pay Period Hours.** This rule is violated if the request would cause the employee to not meet the minimum hours in a pay period (includes Flex Time Requests).

  Tracking for the Required Pay Period Hours entered on the **Settings** page. This page is located on **Organization Management**, under **Request Management**. When this setting is selected for an employee's organization, the Required Hours (balance) for Pay Period section is available on the following pages:

  - **Time Summary**: This page is located on **Tracking**, under **Roster**.
  - **My Schedule Summary**: This page is located on **My Home**, under **My Schedule**.

  One or more time off activities must be set up to deduct from the Required Pay Period Balance. (This is done on the Activities page. It is located on **Administration**, under **Work Administration**, **Request Management Usage** section.)
- **Time Off Bid: Enforce the maximum approvals per employee for Time Off Bids.** This rule is violated if the request exceeds the maximum time that can be approved for that employee and bid. The maximum time can be hours or days.

  The maximum time for all employees in an organization and its suborganizations that are in the bid is set on the **Settings** page. This page is located on **Request Management**, under **Time Off Bidding**. The maximum time for individual employees that are in the bid is set on the **Employees** page. This page is located on **Request Management**, under **Time Off Bidding**.
- **Time Off Bid: Requests submitted before Time Off Bid deadline.** This rule is violated if the request is submitted after the Time Off Bid deadline.
- **Time Off Bid: Request does not overlap with approved Requests.** This rule is violated if the request overlaps one or more approved time-off requests. This rule prevents automatic approval of multiple continuous requests in the Time Off Bid process.
- **Request complies with maximum** <*number*> **approved time off requests per quarter.** This rule is violated if the request for the selected time off type exceeds the specified number of approved time off request in any quarter. The four quarters are:

  - January, February, and March (Q1)
  - April, May, and June (Q2)
  - July, August, and September (Q3)
  - October, November, and December (Q4)

Related topics

Define validation rules for time-off requests, page 25

Approved time-off withdrawal validation rules

Use this validation rule to set a condition that you want validated in approved time-off withdrawal requests.

- **Request complies with filing rules.** This rule is violated if the withdrawal request submission date violates any of the filing rules applicable to the employee's organization.

Related topics

Define validation rules for time-off requests, page 25

VTO options request validation rules

A subset of the time-off request validation rules verifies VTO options requests. These rules must be turned on to be effective.

Rules validated when a VTO request is submitted

- Request avoids blackout days for the Time Off Pool.
- Request complies with filing rules.
- Requested time-off is for a past date.
- Requested time is not being swapped.

Rules validated when processing VTO options requests with a group action

- Time Off Pool has available time-off hours.
- Scheduled calendar event activities that the request avoids.
- Request complies with Required Pay Period Hours.

Related topics

Define validation rules for time-off requests, page 25

Create a filing rule for time-off requests

You can create a filing rule to specify when time-off request must be submitted. When time-off requests are submitted, a validation rule verifies that the requests comply with the filing rule for the time-off type in the request.

After a rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

> If the following time-off validation rule is not selected, the filing rule is not effective:
>
> Request complies with filing rules.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Filing Rules**.
2. In the left pane, click an organization.
3. Click **Create New Rule**.
4. Click **Time Off**.
5. In the **Filing Rules** workspace, complete the settings.
6. Click **Save**.

Related topics

Time-off request filing rule settings, page 31

Time-off request validation rules, page 26

Recommended workflow: Set up time-off requests, page 19

Filing rules list page

Filing rules set the protocols that an employee must follow to file various types of requests.

Column	Description
Apply	Indicates whether the rule applies to the currently selected organization under **Organization Name**. For sub-organizations, it depends on the **Apply to sub-orgs** options when creating a filing rule. You can apply the rule to the organization for which you are creating the rule and to its sub-organizations (the default). Alternatively, you can apply the rule to the parent organization *only*.
Request Type	Indicates the type of request for this filing rule.

Column	Description
Which Request	Indicates the criteria that is used to determine which requests are affected by the rule. When creating a request, you can select to have **all requests of this type** affected by the rule, or only requests submitted for a specific day of the week or date and time range.
When to file	Specifies when the request (of the specified type) must be filed in relation to a specific date or date range. For example, you can specify for Vacation time-off requests to be filed more than 5 days in advance before June 1, 2017.
Owner Organization	Indicates the organization for which the rule was created. To edit a rule, select the owner organization and click **Edit Rule**.

Related topics

Create a filing rule for time-off requests, page 29
Create a filing rule for flex time requests, page 71
Create a filing rule for approved shift swap withdrawal requests, page 99
Create a filing rule for shift bidding requests, page 84
Create a filing rule for shift requests & changes, page 116

Time-off request filing rule settings

Use these settings to create a filing rule for time-off requests.

Location

Go to **Organization Management**. Under **Request Management**, select **Filing Rules** page (when the selected request type is Time Off).

Settings

Field	Description
Time off requests affected by the rule you are creating	Two settings determine which requests are affected by this rule. • Time off type list: Specifies time-off requests for this time off type (activity) are affected. • Specifies which requests of the selected time off type are affected: - All requests of this type (default setting) - For (limited to requests submitted for a weekend, specific day of the week, or working holiday) - For (limited to requests submitted for a specific date and time range)
Request must be filed	Specifies when the requests must be filed. Options are: • Request must be submitted on, before, or after a specific date and time. • Request must be submitted by a specific time period relative to the date of the requested time off.
Apply to sub-orgs	Specifies whether this rule applies only to the organization or to the organization and its suborganizations.

Related topics

Create a filing rule for time-off requests, page 29

Create a filing rule for approved time-off withdrawal requests

You can create a filing rule to specify when approved time-off withdrawal requests must be submitted. When these requests are submitted, a validation rule verifies that these requests comply with the filing rule.

After a rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

> If the following time-off validation rule is not selected, the filing rule is not effective:
>
> Request complies with filing rules.

Procedure

1 Go to **Organization Management**. Under **Request Management**, select **Filing Rules**.

2 In the left pane, click an organization.

3 Click **Create New Rule**.

4 Click **Approved Time Off Withdrawal**.

5 In the **Filing Rules** workspace, complete the settings.

6 Click **Save**.

Related topics

Approved time-off withdrawal filing rule settings, page 32

Recommended workflow: Set up time-off requests, page 19

Approved time-off withdrawal filing rule settings

Use these settings to create a filing rule for approved time-off withdrawal requests.

Location

Go to **Organization Management**. Under **Request Management**, select **Filing Rules** page. These settings are available when the selected request type is Approved Time Off Withdrawal.

Settings

Field	Description
Request must be filed	Specifies the request must be submitted by a specific time period relative to the date of the scheduled time-off.
Apply to sub-orgs	Specifies whether this rule applies only to the organization or to the organization and its suborganizations.

Related topics

Create a filing rule for approved time-off withdrawal requests, page 32

Create an autoprocessing rule for time-off requests

Instead of processing time-off requests manually, you can save time by creating an autoprocessing rule. The system uses this rule to approve, waitlist, and deny requests that violate time-off request validation rules.

After an autoprocessing rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Autoprocessing**.
2. On the **Autoprocessing** list page, click **Create New Rule**.
3. On the **Create New Autoprocessing Rule** popup, click **Time Off**.

   The **Autoprocessing** rule form is displayed.
4. Optional: Under **Apply to sub-orgs**, click a sub-org option.
5. Under **Time Off Requests affect by this rule**, click one of the options.
6. Under **Autoprocessing Criteria**, do the following to set up auto-processing criteria for approval, waitlist (when available), and denial:
   a. Based on the autoprocessing action you want to define, select one of the following check boxes:
      - **Approval Criteria**
      - **Waitlist Criteria** (Available when Waitlists are set up.)
      - **Denial Criteria**

   b. Click one of the autoprocessing options.

   c. If you selected the option that requires validation rules for the auto-processing criteria, select one or more of the rules shown in **bold**. This convention indicates which validations rules are configured for this organization. If you select any other rules, they are ignored.

   d. Repeat Step 6 until you have completed the auto-processing criteria for all actions that you want to use for this request type.
7. Click **Save**.

Related topics

Time-off request autoprocessing rule settings, page 35

Recommended workflow: Set up time-off requests, page 19

Auto processing list page

On this page, you can manage all actions related to autoprocessing rules for all request types.

You can do the following:

- Access the rule form to create a rule or edit an existing rule.
- Copy a rule from one organization to another.
- Change the rule from active to inactive for an organization.

- Delete a rule.

Column	Description
Apply	This check box provides the following functions: • Indicates the status of the rule for the selected organization. When the check box is selected, the rule is active (applied to the organization). When the check box is clear, the rule is inactive (not applied to the organization). • When the check box is available, it can be selected or cleared to change the status of the rule for the selected organization.
Request Type	Identifies which request type this rule autoprocesses.
Which Request	Identifies which requests this rule autoprocesses.
How to Auto-Process	Identifies the auto-processing criteria used by this rule. When the criteria is a validation rule, the rule icon is shown. You can point to an icon to view the name of the rule.
Owner Organization	Identifies the organization that either created the rule or the *copy to* organization. Only the owner organization can edit or delete the rule.

Time-off request autoprocessing rule settings

Autoprocessing rule settings define whether the rule applies to suborganizations, which time-off requests are affected, and the auto-processing criteria.

Location

Go to Organization Management. Under Request Management, select Autoprocessing. These settings are available when the Create New Autoprocessing Rule type is Time Off.

Apply to sub-orgs section

This section provides options to exclude or include suborganizations from this rule.

Field	Description
Apply to this org only	Rule applies only to the organization, and not to its suborganizations.
Apply to sub-orgs (no overrides)	Rule applies to the organization and its sub-organizations. The suborganizations cannot change the status of the rule or edit it.
Apply to sub-orgs (allow overrides)	Rule applies to the organization and its sub-organizations. The suborganizations can change the status of the rule, but cannot edit it.

Time-off requests affected by the rule you are creating section

This section provides options to limit which requests are auto-processed.

Field	Description
Time off type	Rule applies only to time-off requests with the selected time-off type (activity).
All requests of this type	All time-off requests are auto-processed for approval. No restrictions are applied.
For (specific day of the week, a weekend or working holiday)	Only requests submitted for the selected day of the week, a weekend, or a working holiday are autoprocessed for approval.
For (date range)	Only time-off requests submitted for the specified date range are autoprocessed for approval.

Autoprocessing Criteria - Approval

Use this section to select autoprocessing criteria for request approval. This section varies based on the request type.

Field	Description
Approval Criteria	When selected, autoprocessing approves requests based on the selected criteria.
The following three auto-approve options are available.	
Do not auto approve any requests	No requests are automatically approved. All requests must be approved manually.
Approve requests with no violations	Only requests that do not violate any validation rules configured for this request type are autoapproved.
Approve requests violating only:	The following requests are auto-approved: • Requests that do not violate any validation rules configured for this request type. • Requests that only violate the validation rules selected for approval criteria.

Autoprocessing Criteria - Waitlist

This section is available when the **Enable Time Off Waitlist** setting is selected on the General page. This page is located on System Management, under General Settings (Request Management section).

Field	Description
Waitlist Criteria	When selected, auto-processing is used to waitlist requests based on the selected criteria.
The following auto-waitlist options are available.	
Do not auto waitlist any requests	No requests are automatically put on the waitlist. All requests must be waitlisted manually.
Waitlist requests with at least one violation	Requests that violate one or more validation rules are waitlisted.
Waitlist requests violating only:	Requests that only violate the validation rules selected for waitlist criteria are waitlisted.

Auto-Processing Criteria - Denial

Field	Description
Denial Criteria	When selected, auto-denial is used to process requests based on the selected criteria.
The following auto-deny options are available.	
Do not auto deny any requests.	No requests are automatically denied. All requests must be denied manually.
Deny requests with at least one violation.	Requests that violate *any* validation rules configured for this request type are automatically denied.
Deny requests violating:	Requests that violate the *selected* validation rules are automatically denied.

Related topics

Create an autoprocessing rule for time-off requests, page 34

Create an autoprocessing rule for approved time-off withdrawal requests

While approved time-off withdrawal requests can be processed manually, you can set up a rule for the system to process them automatically. An autoprocessing rule can be used to approve and deny requests based on the validation rules that you set.

After an autoprocessing rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

Procedure

1 Go to **Organization Management**. Under **Request Management**, select **Auto Processing**.

2 On the **Autoprocessing** list page, click **Create New Rule**.

3 On the **Create New Autoprocessing Rule** popup, click **Approved Time Off Withdrawal**.

The **Autoprocessing** rule form is displayed.

4 Optional: Under **Apply to sub-orgs**, click a sub-org option.

5 Under **Approved Time Off Withdrawal Requests affect by this rule**, click one of the options.

6 Under **Autoprocessing Criteria**, do the following to set up auto-processing criteria for approval and denial:

a. Based on the autoprocessing action you want to define, select one of the following check boxes:
   - **Approval Criteria**
   - **Denial Criteria**

b. Click one of the autoprocessing options:
   - **Approve requests with no violations**
   - **Approve requests violating only:** (*selected validation rules*)

c. If you select the option that requires validation rules for the autoprocessing criteria, select the available rule. If the rule is **bold**, it indicates the rule is effective for your organization; otherwise, it is ignored.

d. Repeat Step 6 until you have completed the autoprocessing criteria for all actions that you want to use for this request type.

7 Click **Save**.

Related topics

Approved time-off withdrawal autoprocessing rule settings, page 39

Recommended workflow: Set up time-off requests, page 19

Approved time-off withdrawal autoprocessing rule settings

Autoprocessing rule settings define whether the rule applies to suborganizations, which flex time requests are affected, and the auto-processing criteria.

Location

Go to **Organization Management**. Under **Request Management**, select **Autoprocessing**. These settings are available when the rule type is Approved Time Off Withdrawal.

Apply to sub-orgs section

This section provides options to exclude or include suborganizations from this rule.

Field	Description
Apply to this org only	Rule applies only to the organization, and not to its suborganizations.
Apply to sub-orgs (no overrides)	Rule applies to the organization and its sub-organizations. The suborganizations cannot change the status of the rule or edit it.
Apply to sub-orgs (allow overrides)	Rule applies to the organization and its sub-organizations. The suborganizations can change the status of the rule, but cannot edit it.

Approved Time Off Withdrawal Requests affected by the rule you are creating

This section provides options to limit which requests are autoprocessed.

Field	Description
All requests of this type	All requests are auto-processed for approval. No restrictions are applied.
For (specific day of the week, a weekend or working holiday)	Only requests submitted for the selected day of the week, a weekend, or a working holiday are auto-processed for approval.
For (date range)	Only requests submitted for the specified date range are auto-processed for approval.

Autoprocessing Criteria - Approval section

Use this section to select autoprocessing criteria for request approval. This section varies based on request type.

Field	Description
Approval Criteria	When selected, autoprocessing approves requests based on the selected criteria.
The following three auto-approve options are available.	
Do not auto approve any requests	No requests are automatically approved. All requests must be approved manually.
Approve requests with no violations	Only requests that do not violate any validation rules configured for this request type are auto-approved.
Approve requests violating only:	The following requests are auto-approved: • Requests that do not violate any validation rules configured for this request type. • Requests that only violate the validation rules selected for approval criteria.

Auto-Processing Criteria - Denial

Field	Description
Denial Criteria	When selected, auto-denial is used to process requests based on the selected criteria.
The following auto-deny options are available.	
Do not auto deny any requests.	No requests are automatically denied. All requests must be denied manually.
Deny requests with at least one violation.	Requests that violate *any* validation rules configured for this request type are auto-denied.
Deny requests violating:	Requests that violate the *selected* validation rules are automatically denied.

Related topics

Create an autoprocessing rule for time-off requests, page 34

Create a special day

Special days, such as holidays, can be added to an organization's time-off calendar. Employees can view the non-working holidays and working holidays when planning their time-off requests.

After a special day has been created for an organization, you can copy it other organizations. The *copy to* organizations becomes the owner organization of the rule as if it had created it.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Special Days**.
2. Optional: In the **View Year** list, select another year.
3. In the left pane, click an organization.
4. Click **Create New Special Day**.
5. To define the special day, do the following:
   a. Type a name.
   b. Click the type of holiday.
   c. Choose a date range, and change the time if needed. For a single day, select the same day for both the From and To dates.
   d. Optional: Apply this special day to sub-orgs (no override allowed).
6. Click **Save**.

Related topics

Special Days list page , page 41
Special Days setting page, page 42
Recommended workflow: Set up time-off requests, page 19

Special Days list page

Use this page to manage special days. You can access the special day form to create or edit a special day, copy a special day, and delete a special day.

Column	Description
Special Day Name	Descriptive name of the special day.
Type	Indicates whether the special day is a paid or non-paid holiday.
Start Date	Date and time the special day starts.
End Date	Date and time the special day ends.
Owner Organization	The organization that can edit, copy, or delete a special day. The owner organization either created the day or the day was copied to it.

Related topics

[Create a special day](), page 41
[Delete a special day](), page 43

Special Days setting page

Use this page to create or edit a special day for an organization.

Field	Description
Organization Name	(*Display only*)
Special Day Name	Descriptive name of the special day.
Type	Identifies whether the special day is a paid on non-paid holiday. • Paid holidays display on the organization's time-off calendar as non-working holidays. Employees do not need to submit a time-off request for these days. • Non-paid holidays display on the organization's time-off calendar as working holiday. Employees must submit a time-off request for these days. By default, different colors are used to identify these two types of special days on the organization's time-off calendar.
Date Range	Start date and time, and end date and time.
Apply to sub-orgs	The following two options are available: • **Apply to this org only**: The special day only applies to the organization it was created in--the owner organization. • **Apply to sub-orgs (no overrides)**: This special day applies to the parent organization (owner organization) and its suborganizations. The sub-organization cannot change the special day. Only the owner organization can edit, delete, or copy it. The **Apply to sub-orgs (allow overrides)** option is not available for special days.

Related topics

[Create a special day](), page 41

Delete a special day

When you want to remove a special day from an organization's time-off calendar, you can delete it.

When you delete a special day that was created with the **Apply to sub-orgs** option, it is deleted from the sub-organizations too.

Before you begin

Create a special day, page 41

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Special Days**.
2. Optional: In the **View Year** list, select another year.
3. In the left pane, click the owner organization.
4. In the right pane, click a special day.
5. Click **Delete Special Day**.
6. To confirm this deletion, click **OK**.

   The special day is deleted from the Special Days list page and the organization's time-off calendar.

Time-off pools

Time-off pools let you allocate how much time-off a group of employees can take for a specific time period. A time-off pool can have time-off allocations for a day, segments of a day, or both.

Time-off pools are created for an organization, and an organization can have multiple time-off pools. Hours in requests for time-off activities that deduct from a time-off pool affect the hours displayed on the Time-Off calendar.

Daily allocations time-off pool

A set number of hours are allocated for each 24-hour day for employees to use for time-off. Requests for an entire day are deducted from the daily allocations time-off pool.

Example: Daily Allocations

- On Monday, May 1, 16 hours are allocated for time-off.
- Tom and Joann both submit a time-off request for May 1. Their request are approved, and 0 hours are allocated for May 1 in this time-off pool now. The next request for May 1 will be either denied or waitlisted.

Interval allocations time-off pool

A set number of hours are allocated for segments of time during a day for employees to use for time-off. The segments can be as small as 15 minutes. Requests for time-off during a specific time range during the day are deducted from this pool.

Example: Interval 1 definition

- Start and end time: 6:00 A.M. to 8:15 A.M. for a duration of 2 hours and 15 minutes
- 3 hours are allocated for time off during this interval

Example: Interval 2 definition

- Start and end time: 1:00 P.M. to 4:45 P.M for a duration of 3 hours and 45 minutes
- 2 hours are allocated for time off during this interval

Interval allocation time-off pool considerations

To determine the range of hours to target for pool availability, employees in an organization with any activity set up to deduct from an interval allocations time-off pool must have either a published schedule for the requested time-off or a reference schedule. Otherwise, an error occurs.

- If you use the interval time-off pool for *near-term activities* when the employee would have a published schedule (such as voluntary time-off), you do not need to assign a reference schedule to the employees.
- If you use the interval time-off pool for *future activities* that occur when the employee does not have a published schedule, you must assign a reference schedule to the employees. For the reference schedule, select a one-week published schedule that best represents the employee's typical work week.

Related topics

Recommended workflow: Set up time-off requests, page 19

Related information

Organization Activity Details (*Workforce Management Administration Guide*)

Create a time-off pool

Create a time-off pool to define how much time can be taken off for a specific time period. A time-off pool can have time-off allocations for each day, segments of each day, or both.

If you need to stop before you have finished, you can edit the time-off pool later.

Before you begin

- Create activities that deduct from a daily allocation time-off pool, interval allocation interval time-off pool, or both. Activities are set up on the Activities page. This page is on **Work Administration**, under **Activities**.
- Determine if you want to import the daily allocation hours (including blackout days) or interval allocation hours instead of adding them to the calendar manually. The import option is available after the time-off pool is created.) Next, decide if you want to import allocations when you create the time-off pool or later. If you want to import allocations now, pause and create the import file.

  Allocation hours import file , page 51

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Time Off Pools**.
2. Click **Create**.
3. In the **Time Off Pools Detail** section, do the following:
   a. Type a name.
   b. Optional: Type a description.
4. Optional section: In the **Time Off Waitlist** section, do the following if you want to set up one or both waitlist options:
   a. To waitlist time-off requests, select the check box.
   b. To auto scan waitlisted request, select the check box.
   c. If needed, change the waitlist sort priorities.
5. If you want to create daily allocations, do the following:
   a. In the **Allocation Type** section, no action is needed. Daily allocations is the default.
   b. Under **Enter Allocated Time Off hours into the calendar and blackout days** section, do the following:
      - Optional: Change the default month and year.
      - Do one of the following, for each day of the month.
        - When time-off is not allowed, select the check box.
        - When time-off is allowed, type the number of time-off hours that you want to allocate. Repeat until your are finished.
      - Click **Save**.

   Now the options to import allocations or set blackout days are available.

6 If you want to create interval allocations, do the following:

a. Under the **Allocation Type** section, click **Interval Allocations**.

b. For each day of the month, do one of the following:

- When time-off is not allowed, select the day as a blackout day by selecting the check box.

> If you selected blackout days on the daily calendar, they are marked on the interval calendar automatically.

- When time-off is allowed, allocate interval hours for the day using one of the two methods:
  - In the space under a date row, place your pointer at the start time and drag it to the end time. View the interval on **Create Interval** window. Click **Set**. Repeat as needed for other intervals.
  - Click **Create Interval**, and enter the interval allocation on the **Create Interval** window. Click **Set**. Repeat as needed for other intervals.
- Click **Save**.

Now the options to import allocations or set blackout days are available.

What to do next

Assign employees to a time-off pool and allocate time-off hours, page 57

Related topics

Time-off pools, page 44
Time-Off Pool list page, page 46
Time-Off Pools page, page 47
Import time-off allocations, page 50
Recommended workflow: Set up time-off requests, page 19

Related information

Organization Activity Details (*Workforce Management Administration Guide*)

Time-Off Pool list page

Use this page to manage time-off pools. You can access the time-off pool form to create a time-off pool or edit an existing pool, view a time-off pool, and delete a time-off pool.

Column	Description
Time Off Pool	Name of the time-off pool
Description	Optional: Description of time-off pool.
Owner Organization	Name of the organization that created the time-off pool.

Related topics

Create a time-off pool, page 45

Delete a time-off pool, page 56
Recommended workflow: Set up time-off requests, page 19

Time-Off Pools page

Use time-off pools to manage the amount of time that employees can take off in a specific time period.

Field	Description
Time Off Pools Details section	
Organization Name	Read only.
Name	Name of time-off pool.
Description	Optional: Description of time-off pool.
Time Off Waitlist section	
Enable waitlists	When selected, time-off requests that have been denied are put on a waitlist.
Enable auto scan of waitlisted requests	When selected, waitlisted requests scans are triggered if one of the following events that cause changes in the organization's time-off pool allocated hours or employee time-off hours occur: • A change to the time-off pool for an organization. • An employee withdraws an approved time-off event. • A change to the blackout status of a date. • A change in the approved allocation hours of the approved time-off after the schedule has been published. • Any changes such as an update, addition, deletion, enabling/disabling auto-processing or auto-filing, or validation rules for time-off. (Including similar actions for the parent organization's time-off pool or organizations sharing the time-off pool allocation hours. After a waitlist scan has been triggered, the waitlisted requests are filtered and sorted according to the date range and the organizations affected by the triggering event. Then, the auto-processing engine sequentially processing these filtered and sorted waitlisted requests for approval or denial.
Waitlist sort priorities	Available when **Enable auto scan of waitlisted requests** is selected. Identifies the sort order priority for waitlists. Up to three different columns are available for sorting the waitlist requests for processing. By default, the first priority (column) is set to sort by Seniority in Ascending order. This priority can be changed, and two other priorities can be defined.
Allocation Type section	

Field	Description
(*drop down list*)	List includes the following options: • **Daily Allocations** (default): Time-off allocation hours are for an entire day. • **Interval Allocations**: Time-off allocation hours are for periods smaller than a day. By default, each day is populated with a 24-hour interval with zero hour allocated for time-off. Interval allocations can be as short as 15 minutes or as long as 24 hours.
(*calendar*)	Based on the selected allocation type, a monthly calendar is displayed for entering the allocation hours and blackout days. • **Daily Allocations** (default): Calendar is in the traditional table format with a box for each day in the month. Within each box, there is a text box for typing the allocation hours and a check box for marking the day as a blackout day. • **Interval Allocations**: Calendar is a non-traditional table format. The first column lists each day of the month. The remaining columns show each of the 24 hours in a day. When an interval time-off period has been configured for a time-off pool, it is listed in the row for that date and under the appropriate time column for the period start and end time. Three values, separated by commas, are shown in the following sequence: - 1 Hours Allocated - 2 Hours Pending - 3 Schedule Time Off

Related topics

Create a time-off pool, page 45

Interval window

From this window, you can create, edit, and delete interval allocation hours. When these hours are defined, employees can request time off for periods less than a day.

Field	Description
Date	Date of the interval. When you edit an interval, this field is not available.
Interval	Beginning and ending time of the interval. Both times must occur in the same 24-hour day.
Hours	Number of hours allocated for time off during this interval. Valid values: • Whole numbers (0, 1, 2, 3,...) • Decimal numbers (.5, 1.75, 2.0...)

Related topics

Create a time-off pool, page 45

Edit interval allocation hours for a time-off pool, page 49

Delete interval allocation hours for a time-off pool, page 49

Edit interval allocation hours for a time-off pool

When you need to change the time range or number of allocated hours for an interval, you can edit it.

Before you begin

Create a time-off pool, page 45

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Time Off Pools**.
2. In the left panel, click an organization.
3. In the Time Off Pools list, click a time-off pool and click **Edit**.
4. Under **Allocation Type**, click Interval Allocations.
5. Optional: Using the date selector, change the default month.
6. Locate the interval, and double-click the number (allocated hours).
7. Do the following as needed:
   a. To change the interval start and end times, either type over the time or use the time range selector.
   b. Type the number of hours.
8. Click **Set**.
9. Click **Save**.

Related topics

Create a time-off pool, page 45

Interval window, page 48

Allocation hours import file , page 51

Delete interval allocation hours for a time-off pool

When you no longer want employees to be able to request time off for an interval, you can delete it. The number of interval allocation hours is reset to zero.

> If you need to delete numerous intervals, you can save time by importing the changed interval values using a text file. You can reset the interval to the default value of zero allocated hours.

Before you begin

Create a time-off pool, page 45

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Time Off Pools**.
2. In the left panel, click an organization.
3. In the Time Off Pools list, click a time-off pool and click **Delete**.
4. Under **Allocation Type**, click **Interval Allocations**.
5. Optional: Change the default month using the date selector.
6. Locate the interval, and double-click the number (allocated hours).
7. Click **Delete**.
8. Click **Save**.

Related topics

Interval window, page 48
Allocation hours import file , page 51

Import time-off allocations

To save time when you have numerous time-off allocations to enter, you can import them using a text file. When you want to create, edit, or delete individual time-off allocations, you can do it manually.

Before you begin

- Create a time-off pool, page 45
- Create an import file
  Allocation hours import file , page 51

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Time Off Pools**.
2. In the left panel, click an organization.
3. In the Time Off Pools list, click a time-off pool and click **Edit**.
4. Click **Import**.
5. Complete the **Allocated Time Off** window, and click **Save**.
6. Review the import results.
7. If there are errors, update the import file and repeat Step 4 through Step 6.
8. If needed, make other changes to the time-off pool
9. Click **Save**.

Allocation hours import file

When you have numerous daily or interval time-off hours to define, you can import them using a text file. When importing daily allocation hours, you can import blackout days.

When you want to create, edit, or delete a few interval hours, you can do it manually.

Import file format

- Use a column delimiter such as tab, comma, or semicolon.
- Start each date on a new line.
- Convert other file formats such as Microsoft Excel to text files before importing them.
- To import daily allocations, create the text (.txt) file using the following format:

  <date> <hours> <blackout days>

  Where <date> specifies the month, day, and year in your regional format.

  Where <hours> specifies the number of allocated time-off hours.

  Optional: Where <blackout days> specifies **Yes** or **1** to mark the day.
- To import interval allocations, create the text (.txt) file using the following format:

  <date> <hours> <start time> <end time>

  Where <date> specifies the month, day, and year in your regional format.

  Where <hours> specifies the allocated time-off.

  Where <start time> and <end time> have a 15-minute format (0, 15, 30, 45).

  These two times form an inclusive range.

Error handling

- If there are syntax errors, they are ignored silently (that is, no error messages are displayed).
- Interval allocations only
  - Duplicate rows are not imported.
  - Intervals not in 15-minutes increments are not imported.
  - The End Time must be larger than the Start Time.

Example: Daily allocation hours

The following two examples use the regional formats for the United States, where the date is in the format mm/dd/yyyy.

In the following example, blackout days are not imported:

Date	Hours
01/10/2003	50.5
01/11/2003	55

In the following example, blackout days are imported.

Date	Hours	Blackout Day
01/10/2003	50.5	Yes
01/11/2003	55	1

Using German regional format (dd.mm.yyyy), the lines would be:

Date	Hours
10.01.2003	50.5
11.01.2003	55

Example: Interval allocation hours

This example shows an import file for an entire day.

Date	Hours	Start Time	End Time
11/30/2017	0	0:00	0:30
11/30/2017	1	0:30	1:00
11/30/2017	2	1:00	1:30
11/30/2017	0.5	1:30	2:00
11/30/2017	1.5	2:00	2:30
11/30/2017	0	2:30	3:00
11/30/2017	2	3:00	3:30
11/30/2017	1	3:30	4:00
11/30/2017	0.5	4:00	4:30
11/30/2017	0.25	4:30	5:00
11/30/2017	1	5:00	5:30
11/30/2017	0	5:30	6:00
11/30/2017	1	6:00	6:30

Date	Hours	Start Time	End Time
11/30/2017	2	6:30	7:00
11/30/2017	0.5	7:00	7:30
11/30/2017	1.5	7:30	8:00
11/30/2017	0	8:00	8:30
11/30/2017	2	8:30	9:00
11/30/2017	1	9:00	9:30
11/30/2017	0.5	9:30	10:00
11/30/2017	0.25	10:00	10:30
11/30/2017	0	10:30	11:00
11/30/2017	2	11:00	11:30
11/30/2017	1	11:30	12:00
11/30/2017	0.5	12:00	12:30
11/30/2017	0.25	12:30	13;00
11/30/2017	1	13:00	13:30
11/30/2017	0	13:30	14:00
11/30/2017	1	14:00	14:30
11/30/2017	2	14:30	15:00
11/30/2017	0.5	15:00	15:30
11/30/2017	0.25	15:30	16:00
11/30/2017	1	16:00	16:30
11/30/2017	0	16:30	17:00
11/30/2017	1	17:00	17:30
11/30/2017	2	17:30	18:00
11/30/2017	0.5	18:00	18:30

Date	Hours	Start Time	End Time
11/30/2017	1.5	18:30	19:00
11/30/2017	0	19:00	19:30
11/30/2017	0	19:30	20:00
11/30/2017	2	20:00	20:30
11/30/2017	1	20:30	21:00
11/30/2017	0.5	21:00	21:30
11/30/2017	0.25	21:30	22:00
11/30/2017	1	22:00	22:30
11/30/2017	0	22:30	23:00
11/30/2017	1	23:00	23:30
11/30/2017	2	23:30	24:00

Related topics

Import time-off allocations, page 50

Allocated Time-Off window

When you want to use an import file to enter your time-off allocations, complete this window to define the file parameters.

Field	Description
Allocation Type	Indicates whether the time is for daily allocations or interval allocations.
File to import	Name of text file to import.
Delimiter	Type of delimiter used to separate data items.
Number of Lines to Ignore at Start of File	Lines to skip at the top of the file.
Check the fields to import and enter the column number from your file.	Identifies the fields to import and their position in the delimited text file.

Related topics

Create a time-off pool, page 45

Import time-off allocations, page 50

Set a blackout day range

Blackout days are days when time-off is not allowed. You can save time by entering a range of blackout days in the system instead of selecting individual blackout days on the time-off pool calendar. Also, you can use this method to change a range of blackout days to non-blackout days.

Options based on allocation type

- For time-off pools with daily allocations, you can enter a date range that occurs in a single month or across multiple, consecutive months.
- For time-off pools with interval allocations, you can enter a date range that occurs in one month.

Alternate method of adding blackout days

For time-off pools with daily allocations, you can import blackout days when you import the time-off allocation hours.

Before you begin

Create a time-off pool, page 45

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Time Off Pools**.
2. In the left panel, click an organization.
3. In the Time Off Pools list, click a time-off pool and click **Edit**.
4. Click **Set Blackout Day Range**.
5. Enter the start and end dates.
6. Do one of the following:
   - Click **Set Blackout Days**.
   - Click **Set Non-Blackout Days.**
7. Click **Save**.

Related topics

Set Blackout Day Range window, page 56
Import time-off allocations, page 50

Set Blackout Day Range window

Use this widow to set or unset a range of blackout days instead of entering them individual on the time-off pool calendar.

Field	Description
Date Range	First and last day of the date range.
(*blackout days options*)	Options for marking a range of days on the time-off pool calendar. • **Set Blackout Days**: Designates the days as blackout days. Time-off cannot be scheduled on these days. • **Non-Blackout Days**: Sets or clears the blackout day designation. Time-off can be scheduled on these days.

Related topics

Set a blackout day range, page 55

Delete a time-off pool

If a time-off pool is no longer needed, you can delete it. Employees who are assigned to the deleted pool need to be assigned to another pool. Otherwise, requests from these employees are not processed correctly or not processed as you intended.

Example: An employee's default time-off pool is deleted

Requests with hours for a time-off type that deducts from the default time-off pool violate the following time-off validation rule:

Time Off Pool has available time-off hours.

Example: An employee's default time-off pool is unchanged, but the time-off pool assigned to a time-off type is deleted

The pool for the time-off type reverts to the default time-off pool. Requests with hours for this time-off type are deducted from the default time-off pool.

Before you begin

Create a time-off pool, page 45

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Time Off Pools**.
2. Identify the time-off pool that you want to delete.
3. In the left pane, click the owner organization.
4. In the right pane, click the time-off pool.
5. Click **Delete**.

Assign employees to a time-off pool and allocate time-off hours

Assign a time-off pool and allocate time-off hours to any employee in an organization with time-off types (activities) that are set up to deduct from a time-off pool and are used in requests.

Hours in any requests submitted by employees affect the time-off pool hours displayed on the Time-off calendar.

- When a time-off request is pending, the hours are included in the pending count for this time-off pool.
- When a time-off request is approved, the hours are deducted from the allocation hours for the time-off pool.

Optional: Assign a separate time-off pool for a time-off type

Time Off Type (activities) that are set up to be used in requests and use a time-off pool have a Time Off Pool list. By default, the selected employee time-off pool is assigned to these time-off types. If you want requests for this time-off type to be counted against a different time-off pool, you can assign another pool.

Before you begin

Create a time-off pool, page 45

Procedure

1. Go to **User Management**. Under **Employees**, select **Time Off**.
2. In the left pane, select one or more employees.
3. Under the **Time Off Pool** section, click the pencil (Edit icon).
4. From the **Effective Dates** dialog box, do the following:
   a. Click an effective date option.
   b. Click a time-off pool.
   c. Click **Set**.

Optional: To assign a different time-off pool to a time-off type for the selected employees, complete Step 5 through Step 7.

5. Under the **Time Off Type** section, in a Time Off Pool list, click a different time-off pool.

   The **Edit** icon (a pencil) is displayed.
6. Optional: To change the effective dates, click the Edit icon (pencil). From the Effective Dates dialog box, do the following:
   a. Click an effective date option.
   b. Click **Set**.
7. Click **Save**.

   The **Edit** icon is displayed going forward.
8. To allocate time-off hours, in the text boxes, type the number of time-off hours allotted for each time-off activity or activity type.

Related topics

Time-Off page, page 58
Recommended workflow: Set up time-off requests, page 19

Related information

Organization Activity Details (*Workforce Management Administration Guide*)

Time-Off page

Use the **Time-Off** page to assign time off pools, set time-off allocation hours, and assign a reference schedule to employees.

Employee Selection pane

Lists the available employees.

Workspace Date selector

Changes the time-off information displayed. The default date is your current month, day, and year.

Time-Off Pool section

- **First box**: Lists the time-off pools available for assignment. Only time-off pools defined at the employee's organization and its parent organizations are available for selection.

  A time-off pool must be assigned to any employee in an organization with time-off activities set up to deduct from a time-off pool.

  The employee's current time-off pool is available for selection regardless of which organization the time-off pool was created in. The current time-off pool is available even if it was not created in the employee's current organization or its parent organizations.
- **Second and third boxes**: Display the time-off pool effective dates.

Time-Off Type section

Each row in the table represents a “time off” type of activity and related information. If multiple employees are selected, only the fields in common are displayed. Where information varies, asterisks are displayed in the field.

Column	Description
Time-Off Type	Lists time-off types defined for the organization.

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Time-Off Pool</td><td>If a list is available, a different time-off pool can be selected for the time-off type (activity). Time-off requests for this time-off type are deducted from this time-off pool. By default, the employee's time-off pool is selected for each activity.
A list is available when the activity was created with the following settings selected:
• Used in Requests
• Deduct from Daily Pool or Deduct from Interval Pool
The other time-off pools have the same effective date options as the employee’s time-off pool.
If the employee's time-off pool is changed for the activity, the activity time-off pool has its own effective dates regardless of which time-off pool is selected. The effective dates for the activity time-off pool are independent of the employee main time-off pool going forward. The effective dates remain independent even when the following occurs:
• The time-off pool for the activity is changed back to the original employee time-off pool.
• The employee's time-off pool changes.</td></tr>
<tr><td>Default Per Day</td><td>When the request is for a single day, this value is the number of hours that are debited for a calendar day.</td></tr>
<tr><td>Default Per Week</td><td>When the request spans multiple days, this value is the maximum number of hours that can be debited during a seven-day period.</td></tr>
<tr><td>Accrual Schedule</td><td>If the time-off type (activity) was created with Time Off With Accrual selected, the accrual schedule is listed.
The remaining columns have text boxes for typing the values.</td></tr>
<tr><td>Balance</td><td>Current balance of hours.</td></tr>
<tr><td>Date Last Updated</td><td>Date that the time-off balance was last updated.</td></tr>
<tr><td>Maximum Balance</td><td>Maximum number of hours an employee can accrue.</td></tr>
<tr><td>Maximum Carryover</td><td>Maximum number of hours that can be carried over based on the accrual schedule. (Time-off balances are carried over automatically.)</td></tr>
<tr><td>Accrual Rate</td><td>Text box for typing the accrual rate for the accrual schedule.
Example: If the Accrual Schedule for this activity is a year, four years are available for entering the accrual rate.</td></tr>
</table>

Reference Schedule section

Field	Description
(*first box*)	Provides a list of reference schedules that can be assigned. A reference schedule must be assigned to any employee that belongs to an organization with any time-off activities set up to deduct from an Interval Time Off Pool. The reference schedule is used when an employee submits a time-off request for a period outside a published schedule. The reference schedule determines which intervals are affected by the request. A reference schedule is available for selection when it is a past or present, published single week schedule assigned to the employee.
(*second box*)	Displays the start date that the reference schedule is effective.
(*third box*)	Displays the end date that the reference schedule is effective (when applicable)

Related topics

Effective Dates window: Time-Off Pool, page 60

Effective Dates window: Reference Schedule, page 62

Effective Dates window: Time-Off Pool

Use this window to change the effective dates of a time-off pool or to change the time-off pool.

The top section of the page shows the history for the selected employee.

The bottom section of the page has the following fields:

Field	Description
Effective Dates	The starting and ending dates that assignment is effective. Choices include: • **Update value for current period** *date*: This value is the default option. Use this option to set the effective dates to the current period. • **Insert value for period from***date***to***date*: Use this option to set the effective date from the beginning of the period being viewed to a specified end date. • **Insert value from***date***forward**: Use this option to set the effective date from the beginning of the period being viewed with no specified end date.
Time Off Pool	List of available time-off pools.

Related topics

Assign employees to a time-off pool and allocate time-off hours, page 57

Add a reference schedule for one or more employees

A reference schedule must be selected for any employee that belongs to an organization with one or more time off activities set up to deduct from the Interval Time Off Pool.

The reference schedule is used when an employee submits a time off request for a period outside a published schedule. The reference schedule determines which intervals are affected by the request.

Procedure

1. Go to **User Management**. Under **Employees**, select **Time Off**.
2. In the selection and filter panel on the left, select one or more employees.
3. In the workspace, under the **Reference Schedule** section, select the **pencil** icon.
4. On the **Effective Dates** window, select the effective dates, and select the **Reference Schedule** icon.
5. On the **Scheduling Period Selector** window, select a campaign and a schedule period.
6. Select **Set**.

   The Time Off page is displayed with the selected reference schedule. When multiple employees were selected and have the same schedule period, the value is displayed. When the schedule period is not the same for all selected employees, a series of asterisks are displayed in the **Start Date** box.
7. Select **Save**.

Related topics

Delete a reference schedule for one or more employees, page 63

Scheduling Period Selector window

Use this window to select the schedule period used as the reference schedule.

Field	Description
Campaign	List of campaigns the selected employee or employees are in.
Schedule Period	List of past or present, published one week schedules for the selected campaign.

Related topics

Time-Off page, page 58

Related topics

Schedule Auctions: Settings page, page 138

Effective Dates window: Reference Schedule

Use this window to assign a reference schedule to one or more employees.

The top section of the page shows the history of effective dates for the selected reference schedule.

The bottom section of the page has the following fields:

- **Effective Dates**: The starting and ending dates that the reference schedule is effective. Choices include:
    - **Update value for current period** *date*: This value is the default option. Use this option to set the effective dates to the current period.
    - **Insert value for period from** *date* **to** *date*: Use this option to set the effective date from the beginning of the period being viewed to a specified end date.
    - **Insert value from** *date* **forward**: Use this option to set the effective date from the beginning of the period being viewed with no specified end date.
- **Reference Schedule**: To access the Scheduling Period Selector dialog box, click the schedule icon.

Related topics

Time-Off page, page 58

Delete a reference schedule for one or more employees

When you have assigned a reference schedule to an employee and no longer want it to be used, you can delete it. Afterward, the daily and weekly time off defaults are used to calculate time-off hours.

Resolving errors

Reference schedules are not deleted when any selected employee has pending or approved requests for an unpublished period that use an interval allocations time off pool. For example, if five employees are selected and two employees have references schedules that cannot be deleted, the reference schedule is not deleted for all five employees. For each of the two employees, an error messages provides the employee's name, and one request choice or calendar event that uses the references schedule.

To delete the reference schedule for the selected employees, use one of the following options:

- Deny or withdraw the pending or approved requests
- Publish the period the requests occurs in

Before you begin

Add a reference schedule for one or more employees, page 61

Procedure

1. Go to **User Management**. Under **Employees**, select **Time Off**.
2. In the selection and filter panel on the left, select one or more employees.
3. In the workspace, under the **Reference Schedule** section, select the **trash can** icon.
4. Select **Save**.
5. If errors are returned, use one of the resolution options and select **Save**.

Related topics

Time-Off page, page 58

Setting up flex time requests

A flex time request allows an employee to ask for time-off and*make up* the time instead of having the time deducted from their time-off accrual.

Topics

Recommended workflow: Set up flex time requests

A flex time request allows an employee to ask for time-off and *make up* the time, instead of having the time deducted from their time-off accrual.

This workflow shows the process for setting up flex time requests and using all system features. Follow the procedures that fit the need of your organization.

Workflow

1. Define settings shared by all request types, page 15

   While most Request Management settings are specific to one type of request, several optional settings are effective for all request types.

2. Define settings for flex time requests, page 66

   Flex time settings determine when employees can make up their time, whether flex time-off is limited to the beginning of a shift block, and whether employees can submit consecutive flex time requests.

3. Create policies for flex time requests, page 68

   Flex time request policies provide guidance to employees about submitting requests. Employees can view all request policies on the Policies page (on the My Requests menu).

4. Define validation rules for flex time requests, page 69

   Flex time validation rules verify that these requests meet the conditions that you specify. The validation rules that you set for a request type are available as criteria for auto-processing rules.

5. Create a filing rule for flex time requests, page 71

   You can create a filing rule to specify when flex time requests must be submitted. When flex time requests are submitted, a validation rule verifies that the requests comply with the filing rule.

6. Create an autoprocessing rule for flex time requests, page 73

   While flex time requests can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule can be used to approve and deny requests that violate flex time request validation rules.

Define settings for flex time requests

Flex time settings determine when employees can make up their time, whether flex time-off is limited to the beginning of a shift block, and whether employees can submit consecutive flex time requests.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Under the **Flex Time** section, complete the settings that you want to use.
4. To save these settings, do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Flex time settings, page 66

Recommended workflow: Set up flex time requests, page 65

Flex time settings

Flex time settings define options and set requirements in flex time requests submitted by employees in an organization.

Location

Go to **Organization Management**. Under **Request Management**, select **Settings**. The settings are available when flex time is selected.

Settings

Setting	Description
Allow makeup extensions before shift	Employees can make up flex time off *before* a scheduled shift.
Allow makeup extensions after shift	Employees can make up flex time off *after* a scheduled shift.
Allow makeup extensions in shift gaps	Employees can make up flex time off during available gaps that occur during the scheduled shift.
Limit time off request to beginning of shift blocks	An employee can only request flex time off at the beginning of each shift block.
Allow consecutive flex time off requests	Employees can make consecutive flex time off requests during a scheduled shift.

Related topics

Define settings for flex time requests, page 66

Create policies for flex time requests

Flex time request policies provide guidance to employees about submitting requests. Employees can view all request policies on the **Policies** page (on the **My Requests** menu).

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Under the **Flex Time Policies** section, type the information you want employees to know about submitting shift bid requests.
4. To save, do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Flex time policies, page 68

Recommended workflow: Set up flex time requests, page 65

Flex time policies

Text box to type information that you want employees to know about submitting flex time requests. Employees can view your policies on the **Policies** page. This page is located on **My Home**, under **My Requests**.

Location

On the **Settings** page located on **Organization Management** under **Request Management**

Related topics

Create policies for flex time requests, page 68

Define validation rules for flex time requests

Flex time validation rules verify that these requests meet the conditions that you specify. The validation rules that you set for a request type are available as criteria for auto-processing rules.

Each validation rule has an icon. When a request violates a validation rule, the icon is displayed on the following pages:

- **Employees Request**: Employees that manage requests submitted by others use this page.
- **My Request**: Employees manage their own requests from this page.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Validation**.
2. In the left pane, select an organization.
3. Under the **Flex Time Requests Validation rules** section, define the validation rules that you want to use..
   a. Select the check box.
   b. When needed, complete the rule values (Example: number of minutes, hours, or days).
4. Do one of the following:
   - Click **Save**.
   - Click **Save and Apply to Sub-Orgs**.

Related topics

Flex time request validation rules, page 69
Recommended workflow: Set up flex time requests, page 65

Flex time request validation rules

Use any of these validation rules to check flex time requests.

- **Maximum duration of Flex Time Request:** <*number*> <**Minutes** or **Hours**>**.** This rule is violated if the total flex time duration is greater than the specified maximum.
- **Minimum duration of Flex Time Request:** <*number*> <**Minutes** or **Hours**>**.** This rule is violated if the total flex time duration is less than the specified minimum.
- **Maximum number of makeup blocks per request:** <*number*>**.** This rule is violated if the total number of flex time makeup blocks is greater than the specified maximum
- **Maximum number of Flex Time Requests:** <*number*> <**Month** or **Quarter**>**.** This rule is violated if the total flex time requests are greater than the specified maximum. When this rule is selected for an employee's organization, the Flex Time Summary section is available on the following pages:
  - **Time Summary**: This page is located on **Tracking**, under **Time Summary**.
  - **My Schedule Summary**: This page is located on **My Home**, under **My Schedule**.
- **Makeup must occur as soon as possible and no later than** <*number*> **days.** This rule is violated if earlier suitable flex makeup times occur before the proposed flex makeup time.

- **Scheduled calendar event activities that time off must avoid** <**All** or specific calendar event>**.** This rule is violated if the flex time request falls within a calendar event activity which must be avoided.
- **Request complies with filing rules.** This rule is violated if the request submittal date violates at least one of the filing rules applicable to the employee's organization
- **Makeup time complies with the organization hours of operation.** This rule is violated if the flex makeup time specified in the flex time request does not fall within the hours of operation for the organization.
- **Minimum required time gap between consecutive shifts as per organization settings.** This rule is violated if consecutive shifts including the makeup shift are scheduled closer than the minimum time required between consecutive shifts.
- **Maximum shift duration** <*number*> **minutes per** <**Organization Day** or **24 Hour Period**>**.** This rule is violated if the total shift duration as a result of the flex time makeup is greater than the specified maximum.

Related topics

Define validation rules for flex time requests, page 69

Create a filing rule for flex time requests

You can create a filing rule to specify when flex time requests must be submitted. When flex time requests are submitted, a validation rule verifies that the requests comply with the filing rule.

After a rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

> If the following flex time request validation rule is not selected, the filing rule is not effective:
>
> Request complies with filing rules.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Filing Rules**.
2. In the left pane, click an organization.
3. Click **Create New Rule**.
4. Click **Flex Time**.
5. In the **Filing Rules** workspace, complete the settings.
6. Click **Save**.

Related topics

Flex time request filing rule settings, page 72

Recommended workflow: Set up flex time requests, page 65

Flex time request filing rule settings

Use these settings to create a filing rule for flex time requests.

Location:

On the **Filing Rules** page when the selected request type is Flex Time. This page is located on **Organization Management**, under **Request Management**.

Settings

Field	Description
Flex time requests affected by the rule you are creating	Three settings determine which requests are affected by this rule. • Time off type list: Specifies time-off requests for this time off type (activity) are affected. • Specifies whether the rule affects requests for flex time before or after the makeup time. • Specifies which requests of the selected time off type are affected: - All requests of this type (default setting) - For (limited to requests submitted for a weekend, specific day of the week, or working holiday) - For (limited to requests submitted for a specific date and time range)
Request must be filed	Specifies requests must be submitted by a selected time period relative to the date of the requested flex time.
Apply to sub-orgs	Specifies whether this rule applies only to the organization or to the organization and its suborganizations.

Related topics

Create a filing rule for flex time requests, page 71

Create an autoprocessing rule for flex time requests

While flex time requests can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule can be used to approve and deny requests that violate flex time request validation rules.

After an autoprocessing rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Autoprocessing**.
2. In the left pane, click an organization.
3. On the **Autoprocessing** list page, click **Create New Rule**.
4. On the **Create New Autoprocessing Rule** popup, click **Flex Time**.

   The **Autoprocessing** rule form is displayed.
5. Optional: Under **Apply to sub-orgs**, click another option.
6. Under **Flex Time Requests affected by this rule**, click one of the options.
7. Under **Autoprocessing Criteria**, do the following to set up auto-processing criteria for approval and denial:
   a. Based on the autoprocessing action you want to define, select one of the following check boxes:
      - **Approval Criteria**
      - **Denial Criteria**

   b. Click one of the auto-processing options.
   c. If you selected the option that requires validation rules for the auto-processing criteria, select one or more of the rules shown in **bold**. This convention indicates which validations rules are configured for this organization. If you select any other rules, they are ignored.
   d. Repeat Step 7 until you have completed the autoprocessing criteria for all actions that you want to use for this request type.
8. Click **Save**.

Related topics

Flex time request autoprocessing settings, page 73

Recommended workflow: Set up flex time requests, page 65

Flex time request autoprocessing settings

Autoprocessing rule settings define whether the rule applies to suborganizations, which flex time requests are affected, and the auto-processing criteria.

Location

On the **Autoprocessing** page when the Create New Autoprocessing Rule type is Flex Time. This page is located on **Organization Management**, under **Request Management**.

Apply to sub-orgs section

This section provides options to exclude or include suborganizations from this rule.

Field	Description
Apply to this org only	Rule applies only to the organization, and not to its suborganizations.
Apply to sub-orgs (no overrides)	Rule applies to the organization and its sub-organizations. The suborganizations cannot change the status of the rule or edit it.
Apply to sub-orgs (allow overrides)	Rule applies to the organization and its sub-organizations. The suborganizations can change the status of the rule, but cannot edit it.

Flex Time Requests affected by this rule

This section provides options to limit which requests are auto-processed.

Field	Description
Time off type	Rule applies only to requests with the selected time-off type (activity).
All requests of this type	All flex time requests are auto-processed for approval. No restrictions are applied.
For (specific day of the week, a weekend or working holiday)	Only requests submitted for the selected day of the week, a weekend, or a working holiday are auto-processed for approval.
For (date range)	Only flex time requests submitted for the specified date range are autoprocessed for approval.

Autoprocessing Criteria - Approval section

Use this section to select autoprocessing criteria for request approval. This section varies based on request type.

Field	Description
Approval Criteria	When selected, autoprocessing approves requests based on the selected criteria.
The following three auto-approve options are available.	
Do not auto approve any requests	No requests are automatically approved. All requests must be approved manually.
Approve requests with no violations	Only requests that do not violate any validation rules configured for this request type are auto-approved.
Approve requests violating only:	The following requests are auto-approved: • Requests that do not violate any validation rules configured for this request type. • Requests that only violate the validation rules selected for approval criteria.

Autoprocessing Criteria - Denial

Field	Description
Denial Criteria	When selected, auto-denial is used to process requests based on the selected criteria.
The following auto-deny options are available.	
Do not auto deny any requests.	No requests are automatically denied. All requests must be denied manually.
Deny requests with at least one violation.	Requests that violate *any* validation rules configured for this request type are automatically denied.
Deny requests violating:	Requests that violate the *selected* validation rules are automatically denied.

Related topics

Create an autoprocessing rule for flex time requests, page 73

Setting up shift bidding requests

Using an auction for shift bidding lets employees submit bids for the shifts they prefer.

Workforce Management not only automates Shift Bidding, but also introduces a higher degree of fairness in awarding shifts. The automated rules engine factors in seniority, rank, and unique tie-breaking bonus points, and assigns shifts accordingly.

Topics

Recommended workflow: Set up shift bidding requests

With shift bidding, employees can bid on the shifts that they prefer to work. You can factor in seniority, rank, and bonus points so certain employees are more likely to get their preferred shifts.

This workflow shows the process for setting up shift bidding requests and using all system features. Follow the procedures that fit the need of your organization.

Workflow

1 Define settings shared by all request types, page 15

While most Request Management settings are specific to one type of request, several optional settings are effective for all request types.

2 Define settings for shift bidding requests, page 78

Shift bidding request settings define options and requirements in the shift bidding requests submitted for all auctions in an organization. There are settings for shift preferences, maximum bids per employee, scoring factors, and bid options.

3 Create policies for shift bidding requests, page 81

Shift bidding request policies provide guidance to employees about submitting requests. Employees can view all request policies on the Policies page (on the My Request menu).

4 Define validation rules for shift bidding requests, page 82

Validation rules verify that shift bidding requests meet the conditions that you specify. The validation rules that you set for a request type are available as criteria for autoprocessing rules.

5 Create a filing rule for shift bidding requests, page 84

A filing rule specifies when shift bidding requests must be submitted for auctions in an organization (and optionally the sub-organizations).

6 Create an autoprocessing rule for shift bidding requests, page 85

While shift bidding requests can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule approves and denies requests that violate the shift bidding validation rules.

Define settings for shift bidding requests

Shift bidding request settings define options and requirements in the shift bidding requests submitted for all auctions in an organization. There are settings for shift preferences, maximum bids per employee, scoring factors, and bid options.

Settings specific to a single auction are defined when the auction is created.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select**Settings**.
2. From the **Organization Name** pane, click an organization.
3. Under the **Shift Bidding** section, complete the settings you want to use for this organization.
4. To save these settings, do one of the following:
    - Click **Save and apply to sub-orgs**.
    - Click **Save**.

Related topics

Shift bidding request settings, page 78

Recommended workflow: Set up shift bidding requests, page 77

Shift bidding request settings

Shift bidding request settings affect all shift bidding auctions created for an organization.

Location

On the **Settings** page under the Shift Bidding section. This page is located on **Organization Management**, under **Request Management**.

Settings

Setting	Description
Max Preference Value (1-Highest, Max-Lowest)	Specifies the maximum value that an employee can enter to indicate a shift bid preference. Example: If this setting is 25, employees can enter 25 for their least preferred shift. Preference numbers entered by employees help sort out multiple requests. When deciding on this value, consider the following: • How many bids you expect employees to submit. • Whether you plan to use the **Enforce unique preferences option**.

Setting	Description
Enforce unique preferences	If this check box is selected, duplicate preferences cannot be submitted. Requests with the status of Pending or Escalated are included in the duplicate check. Requests with the status of Withdrawn, Invalid, or Denied are excluded from the duplicate check. Example of the workflow: After entering and saving duplicate preference numbers, the user submits the request. An error message indicates that duplicate preference numbers exist and the preferences must be corrected before the request can be submitted.
Max Bids Per Employee	Determines the maximum number of bids an employee can submit in one scheduled auction (usually a week).
If enabled, the following scoring factors can be used in an auction: If you create a scheduled auction for a specific week, you can specify that the scoring factors are taking in to account when prioritizing shift bidding requests. If scoring is used in an auction, the score is calculated as follows: <Seniority Factor> * <number of months in the company> + <Rank factor> * <Max Rank - Employee Rank> + <Bonus factor> * <total accumulated and assigned bonus> If you do *not* want to use a particular factor in your scoring, set it to zero (0).	
Seniority scoring factor	Number of months the employee has been employed at the company. The value is a specific numeric value X the number of months in the company.
Rank scoring factor	Employee's rank in the company. The value is a specific numeric value X (maximum rank - employee rank).
Bonus points scoring factor	Employee's bonus points in the company. The value is a specific numeric value X the current number of bonus points.

Setting	Description
Bid Options	**Filter options by employee type**. If this check box is selected, the available bid option templates are based on the employee's employee type. (Example: When the employee type is full-time, only templates for full-time employees are listed.) Employee type is assigned in User Management when the employee's profile is created. • If you submit a bid for an employee, the **Bid Options** page lists only the templates available to the selected employee based on their employee type. This page is located on **Request Management**, under **Schedule Options**. • For employees: **My Bid Options** page lists only the templates available to them based on their employee type. This page is listed on **My Home**, under **My Requests**. **Display template description column**. When this check box is selected, a Description column is available. • The column is available on the **Schedules** page. This page is located on **Request Management**, under **Schedule Auctions**. For individual auctions, a maximum of 50 characters can be entered to provide additional information about a schedule template. • For employees: The column is available for view on the **My Bid Options** page. This page is located on **My Home**, under **My Requests**.

Related topics

Define settings for shift bidding requests, page 78

Create policies for shift bidding requests

Shift bidding request policies provide guidance to employees about submitting requests. Employees can view all request policies on the **Policies** page (on the My Request menu).

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Under the **Shift Bidding Policies** section, type the information you want employees to know about submitting shift bid requests.
4. To save, do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Shift bidding policies, page 81

Recommended workflow: Set up shift bidding requests, page 77

Shift bidding policies

Text box to type information that you want employees to know about submitting shift bidding requests. Employees can view your policies on the **Policies** page. This page is located on **My Home**, under **My Requests**.

Location

On the **Settings** page. This page is located on **Organization Management**, under **Request Management**.

Related topics

Create policies for shift bidding requests, page 81

Define validation rules for shift bidding requests

Validation rules verify that shift bidding requests meet the conditions that you specify. The validation rules that you set for a request type are available as criteria for autoprocessing rules.

Each validation rule has an icon. When a request violates a validation rule, the icon is displayed on the following pages:

- **Employees Request**: Employees that manage requests submitted by others use this page.
- **My Request**: Employees manage their own requests from this page.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Validation**.
2. In the left pane, select an organization.
3. In the rule pane, under the **Shift Bidding Request Validation rules** section, do the following for each rule that you want to define:
   a. Select the check box.
   b. When needed, complete the rule values (Example: number of minutes, hours, or days).
4. Do one of the following:
   - Click **Save**.
   - Click **Save and Apply to Sub-Orgs**.

Related topics

Shift bidding request validation rules, page 82

Recommended workflow: Set up shift bidding requests, page 77

Shift bidding request validation rules

Use the shift validation rules to set conditions that you want validated in shift bidding requests.

- **Request complies with filing rules.** This rule is violated if the request submittal date violates any of the filing rules applicable to the employee's organization.
- **Employee's schedule complies with min/max hours, including overtime maximums.** This rule is violated if the requested schedule does not comply with the employee's min/max hours for the week of the auction including the maximum overtime allowed per day or week.
- **Employee has the same skills as required for the selected schedule.** This rule is violated if the employee does not have the same skills as the phantom employee the schedule was generated for. If an employee has more skills than required, this rule is violated.
- **Employee has sufficient skills for the selected schedule.** This rule is violated if the employee does not have some skills in common with the phantom employee the schedule was generated for.
- **Employee's schedule complies with organization hours of operation.** This rule is violated if any of the requested shifts in the shift bid fall outside the employee organization's hours of operation.

Related topics

Define validation rules for shift bidding requests, page 82

Create a filing rule for shift bidding requests

A filing rule specifies when shift bidding requests must be submitted for auctions in an organization (and optionally the sub-organizations).

After a rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

> If the following Shift Bidding Request validation rule is not selected, the filing rule is not effective:
>
> Request complies with filing rules.

Procedure

1 Go to **Organization Management**. Under **Request Management**, select **Filing Rules**.

2 In the left pane, click an organization.

3 Click **Create New Rule**.

4 Click **Shift Bidding**.

5 In the **Filing Rules** workspace, complete the settings.

6 Click **Save**.

Related topics

Shift bidding request filing rule settings, page 84

Recommended workflow: Set up shift bidding requests, page 77

Shift bidding request filing rule settings

Use these settings to specify when shift bidding requests must be submitted.

Location

On the **Filing Rules** page when the selected request type is Shift Bidding. This page is on **Organization Management**, under **Request Management**.

Settings

Field	Description
Request must be filed	Specifies the bid request must be submitted by a selected time period before the auction deadline.
Apply to sub-orgs	Specifies whether this rule applies only to the organization or to the organization and its suborganizations.

Related topics

Create a filing rule for shift bidding requests, page 84

Create an autoprocessing rule for shift bidding requests

While shift bidding requests can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule approves and denies requests that violate the shift bidding validation rules.

If you plan to allow users to submit multiple shift bids, do not use auto-processing for bid approval.

After an autoprocessing rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

Procedure

1 Go to **Organization Management**. Under **Request Management**, select **Autoprocessing**.

2 On the **Autoprocessing** list page, click **Create New Rule**.

3 On the **Create New Autoprocessing Rule** popup, click **Shift Bidding**.

The **Autoprocessing** rule form is displayed.

4 Optional: Under **Apply to sub-orgs**, click a sub-org option.

5 Under **Shift Bidding Requests affected by this rule**, click one of the options.

6 Under **Autoprocessing Criteria**, do the following to set up autoprocessing criteria for approval and denial:

a. Based on the autoprocessing action you want to define, select one of the following check boxes:
   - **Approval Criteria**
   - **Denial Criteria**

b. Click one of the autoprocessing options:
   - **Approve requests with no violations**
   - **Approve requests violating only:** (*selected validation rules*)

c. If you select the option that requires validation rules for the auto-processing criteria, select one or more of the rules shown in **bold**. This convention indicates which validations rules are configured for this organization. If you select any other rules, they are ignored.

d. Repeat Step 6 until you have completed the auto-processing criteria for all actions that you want to use for this request type.

7 Click **Save**.

Related topics

Shift Bidding Autoprocessing Rule settings, page 86

Recommended workflow: Set up shift bidding requests, page 77

Shift Bidding Autoprocessing Rule settings

Use a shift bidding rule to define autoprocessing criteria for shift bidding requests.

Apply to Sub-Org section

This section provides options to exclude or include suborganizations from this rule.

Field	Description
Apply to this org only	Rule is applied only to the organization, and not to its suborganizations.
Apply to sub-orgs (no overrides)	Rule is applied to the organization and its sub-organizations. The suborganizations cannot change the status of the rule or edit it.
Apply to sub-orgs (allow overrides)	Rule is applied to the organization and its sub-organizations. The suborganizations can change the status of the rule, but cannot edit it.

Shift Bidding Requests affected by this rule section

This section provides options to limit which requests are auto-processed.

Field	Description
All requests of this type	All shift bidding requests are auto-processed for approval. No restrictions are applied.
For (date range)	Only shift bidding requests submitted for the specified date range are auto-processed for approval.

Autoprocessing Criteria - Approval section

Use this section to select autoprocessing criteria for request approval. This section varies based on request type.

Field	Description
Approval Criteria	When selected, auto-processing is used to approve requests based on the selected criteria.
The following three auto-approve options are available.	
Do not auto approve any requests	No requests are automatically approved. All requests must be approved manually.
Approve requests with no violations	Only requests that do not violate any validation rules configured for this request type are auto-approved.

Field	Description
Approve requests violating only:	The following requests are auto-approved: • Requests that do not violate any validation rules configured for this request type. • Requests that only violate the validation rules selected for approval criteria.

Autoprocessing Criteria - Denial

Field	Description
Denial Criteria	When selected, auto-denial is used to process requests based on the selected criteria.
The following auto-deny options are available.	
Do not auto deny any requests.	No requests are automatically denied. All requests must be denied manually.
Deny requests with at least one violation.	Requests that violate *any* validation rules configured for this request type are automatically denied.
Deny requests violating:	Requests that violate the *selected* validation rules are automatically denied.

Related topics

Create an autoprocessing rule for shift bidding requests, page 85

Setting up shift swap requests

With shift swap requests, employees can swap either shifts or days off instead of taking time-off.

The following options are available for swapping:

- Employees can create a post on the swap board, so any employee can accept the offer to swap.
- Employees can send a swap request to a specific employee.

Topics

Recommended workflow: Set up shift swap requests

With shift swap requests, employees can swap either shifts or days off. They can either create a post on the swap board or send a swap request to a specific employee.

This workflow describes the procedures for setting up time-off requests and using all system features. Follow the procedures that fit the needs of your organization.

Workflow

1 Define settings shared by all request types, page 15

While most Request Management settings are specific to one type of request, several optional settings are effective for all request types.

2 Define settings for shift swap requests, page 90

Shift swap settings turn on shift swap for an organization, define which organizations can be swapped with, types of swaps allowed, and number of negotiation comments.

3 Create policies for shift swap requests, page 92

Shift swap request policies provide guidance to employees about submitting requests. Employees can view this information on the Policies page (on the My Requests menu).

4 Shift swap request validation rules, page 93

Validation rules can be defined for both shift swap requests and approved shift swap requests to verify that these requests meet the conditions that you specify. The validation rules that you set for a request type are available as criteria for auto-processing rules.

5 Create filing rules

- Create a filing rule for shift swap requests, page 97

  You can create a filing rule to specify when shift swap requests must be submitted. When shift swap requests are submitted, a validation rule verifies that the requests comply with the filing rule.

- Create a filing rule for approved shift swap withdrawal requests, page 99

  You can create a filing rule to specify when approved shift swap withdrawal requests must be submitted. When these requests are submitted, a validation rule verifies that the requests comply with the filing rule.

6 Create autoprocessing rules.

- Create an autoprocessing rule for shift swap requests, page 101

  While shift swap requests can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule can be used to approve and deny requests based on the shift bidding validation rules that you defined.

- Create an autoprocessing rule for approved shift swap withdrawal requests, page 104

  While approved shift swap withdrawal requests can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule can be used to approve and deny requests based on the validation rules that you set.

Define settings for shift swap requests

Shift swap settings turn on shift swap for an organization, define which organizations can be swapped with, types of swaps allowed, and number of negotiation comments.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Define the Shift Swap organization settings:
4. To save these settings, do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Shift swap settings, page 90

Recommended workflow: Set up shift swap requests, page 89

Shift swap settings

Shift swap settings define options and set requirements in shift swap requests submitted by employees in an organization.

Location

On the **Settings** page. This page is on **Organization Management**, under **Request Management**.

Settings

Setting	Description
Enable shift swap	Enables shift swap functionality for the whole organization or branch.
Limit employees' shift swapping to the following organizations	Employees can swap shifts with employees in these organizations.
Disable one-way shift swap	If selected, employees *cannot* do a swap where one employee acquires a shift without giving back another shift.
Allow partial day shift swap requests	If selected, employees can accept a portion of a proposed shift swap instead of an entire shift, and can accept portions of a shift from more than one employee.

Setting	Description
Allow pickup of a portion of a posting	If selected, employees can accept a portion of a proposed shift swap instead of an entire shift, and can accept portions of a shift from more than one employee.
Maximum number of swap negotiation comments per employee	Specifies the number of swap negotiation comments that can be used in negotiating a shift swap. The goal is to reduce comments being used for purposes other than shift swap negotiations.

Related topics

Define settings for shift swap requests, page 90

Create policies for shift swap requests

Shift swap request policies provide guidance to employees about submitting requests. Employees can view this information on the **Policies** page (on the My Requests menu).

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Under the **Shift Swap Policies** section, type the information you want employees to know about submitting shift swap requests.
4. Do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Shift swap policies, page 92

Recommended workflow: Set up shift swap requests, page 89

Shift swap policies

Text box to type information that you want employees to know about submitting shift swap requests. Employees can view your policies on the **Policies** page. This page is located on **My Home**, under **My Requests**.

Related topics

Create policies for shift swap requests, page 92

Define validation rules for shift swap requests

Validation rules can be defined for both shift swap requests and approved shift swap requests to verify that these requests meet the conditions that you specify. The validation rules that you set for a request type are available as criteria for auto-processing rules.

Each validation rule has an icon. When a request violates a validation rule, the icon is displayed on the following pages:

- **Employees Request**: Employees that manage requests submitted by others use this page.
- **My Request**: Employees manage their own requests from this page.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Validation**.
2. In the left pane, select an organization.
3. Under the **Shift Swap Request Validation rules** section, define the validation rules that you want to use.
   a. Select the check box.
   b. When needed, complete the rule values when needed (Example: number of minutes, hours, or days).
4. Under the **Approved Shift Swap Withdrawal Validation rules** section, select the check box.
5. Do one of the following:
   - Click **Save**.
   - Click **Save and Apply to Sub-Orgs**.

Related topics

Shift swap request validation rules, page 93

Approved shift swap request withdrawal validation rules, page 96

Recommended workflow: Set up shift swap requests, page 89

Shift swap request validation rules

Use any of these rules to set conditions that you want validated in shift swap requests.

- **Both employees are from the same organization.** This rule is violated if employees are assigned to different organizations.
- **Both employees are from the same campaign.** This rule is violated if both shifts in a swap do not belong to the same campaign. They can be in different campaign weeks.
- **Both employees have the same skills for the active campaign queue.** This rule is violated if the receiving employee does not have the same skills as the employee currently scheduled to work the shift.
- **Both employees have at least same skills for the active campaign queue.** This rule is violated if the receiving employee does not have at least the same skills as the employee currently scheduled to work the shift. Receiving employees with additional skills will not cause a violation.

- **Both employees have the same proficiencies for the active campaign queue.** This rule is violated if the receiving employee does not have the same skills and proficiencies as the employee currently scheduled to work the shift.
- **Request complies with filing rules.** This rule is violated if the request submittal date violates any of the filing rules applicable to the employee's organization.
- **Both employees comply with min/max hours.** This rule is violated if, after the swap, at least one of the employees will not comply with the min/max hours during the corresponding week(s) of the shift they get and the shift they give away in the swap.
- **Swapped shifts start on the same organization week.** This rule is violated if the swapped shifts do not fall in the same organization week.
- **Swapped shifts have the same paid hours.** This rule is violated if the total duration of paid time in the two shifts is different.
- **Swapped shifts must overlap the exact same portion with scheduled calendar events and time offs, and not overlap unavailabilities.** This rule is violated if the following events occur:
  - Calendar events, which may or may not be inside a shift, do not overlap the same portion of the swapped-in shift.
  - Time off events, which may or may not be inside a shift, do not overlap the same portion of the swapped-in shift.
  - Any unavailability type event will overlap with the swapped shifts as the result of the swap.
- **Swapped shifts will overlap scheduled calendar events that must occur during a shift.** This rule is violated if calendar events, which have to be inside a shift, fall outside shifts as the result of the swap.
- **Partial Shift Swap: Minimum duration of the shift that can be swapped:** <*number*>**Percent** or **Minutes.** This rule is violated if the duration of the swapped shift is less than the specified duration.
- **Partial Shift Swap: Minimum duration of the shift to leave after pickup:** <*number*>**Percent** or **Minutes.** This rule is violated if the remaining shift duration after the swap is less than the specified duration.
- **Maximum shift duration allowed:** <*number*> **minutes per Organization Day** or **24 Hour Period.** This rule is violated if the duration of the swapped shift exceeds the specified duration for the selected time period.
- **Partial Shift Swap: Activities that cannot be included in the swap:** <activity name(s) from drop-down>. This rule is violated if the swap includes any of the specified activities.
- **Gap should be between** <*number*> **and** <*number*> **minutes, or at least** <*number*> **minutes.** This rule is violated if the gap created as a result of the swap is outside the specified range, or if the gap is less than the specified duration. If both the range and the minimum are specified, the rule will be violated only if both the conditions are violated.
- **Maximum overlap with an existing shift:**<*number*> **minutes.** This rule is violated if the overlap with an existing shift caused due to the swap is greater than the specified duration.
- **Maximum consecutive working days allowed as per organization Settings.** This rule is violated if the maximum consecutive working days limit is exceeded.

  This rule only checks the start of shifts (not the end dates).

  The **Maximum consecutive working days to schedule** set on the **Organization Settings** page. under the **Scheduler Options** section. This page is located on **Organization Management**, under

Hierarchies. For example, if the maximum consecutive working days count is set to three, and Employee A is requesting a one-way shift swap from 4/1 to 14/1 then the rule would validate if this shift swap would violate the maximum consecutive working day count for shifts from 1/1 to 1/17, and for the period 1/11 to 1/17.

- **Minimum required time gap between consecutive shifts as per organization Settings.**

  This rule is violated if the minimum time between the end of a first shift and the start of the next shift for all types of shift swap requests is not met.

  The **Minimum time between shift assignments is** set on the **Organization Settings** page. under the **Scheduler Options** section. This page is located on **Organization Management**, under **Hierarchies**.

- **Maximum number of** <*number*> **one-way shift swap requests per**<**Month** or **Quarter**>**.** This rule is violated if the number of one-way shift swaps requested exceeds the maximum number of one-way shift swap requests allowed per month or quarter.

  When this rule is selected for an employee's organization, the One Way Shift Swap section is available on the following pages:

  - **Time Summary**: This page is located on **Tracking**, under **Roster**.
  - **My Schedule Summary**: This page is located on **My Home**, under **My Schedule**.)

  This rule does not count a swap against the one-way swap limit if the employee picks up another shift on the day that was previouly given away.

- **Maximum number of approved swaps for a shift** <*number*>**.** This rule is violated if the shift swap requested exceeds the maximum number of shift swaps allowed per shift.
- **Partial Shift Swap: Limit number of employees involved to** <*number*>**.** This rule is violated if the number of employees who can receive swaps from the same shift is exceeded. This rule is limited to partial swaps.
- **Maximum hours per day** <*number*> **with an alternate maximum hours of** <*number*> **the day after the swap when the maximum hours were reached the day before.** This rule is violated if either condition one or condition two is met.

  - **Condition one**: **Maximum hours per day** <*number*>

    This rule condition is violated if the maximum hours per day limit is exceeded due to a shift swap (that is, an employee works a standard shift and picks up a shift from another employee).

  - **Condition two**: **with an alternate maximum hours of** <*number*> **the day after the swap when the maximum hours were reached the day before.**

    This rule condition is violated if the maximum hours in the day after a shift swap limit is exceeded after the maximum hours per day limit was reached on the previous day.

    Example of completed rule:

    Maximum hours per day 12 with an alternate maximum hours of 10 the day after the swap when the maximum hours were reached the day before.

    Example of results:

    - **Condition one**: If Employee A's standard shift is 8 hours AND Employee A submits a request to pickup a 4-hour shift from Employee B on Monday, then the first condition of this rule is not violated. The maximum hours per day limit is *reached*, but not *exceeded*.
    - **Condition one**: If Employee C's standard shift is 8 hours AND Employee C submits a request to pickup a 6-hour shift from Employee D on Monday, then the first condition of this rule is *violated*. The maximum hours per day limit is *exceeded*.

- **Condition two**: If Employee A's shift swap request for Monday is approved (total of 12 hours), AND Employee A submits a request to swap their 8-hour shift with Employee E's 12-hour shift on the next day (Tuesday), then the rule is violated. The 12-hour work day on Tuesday exceeds the 10-hour limit for the day after a swap that reached the maximum hours limit per day.

- **Request complies with Required Pay Period Hours.** This rule is violated if the employee's shift swap request would cause the employee not to meet the minimum hours in a pay period.

  Tracking for the Required Pay Period Hours is set up on the **Settings** page. This page is located on **Organization Management**, under **Request Management**. When this setting is selected for an employee's organization, the Required Hours (balance) for Pay Period section is available on the following pages:

  - **Time Summary**: This page is located on **Tracking**, under **Roster**.
  - **My Schedule Summary**: This page is located on **My Home**, under **My Schedule**.

  One or more time-off activities must be set up to deduct from the Required Pay Period Balance. (This setting is on the **Activities** page, under the **Request Management Usage** section. This page is located on **Work Administration**, under **Activities**.

Related topics

Define validation rules for shift swap requests, page 93

Approved shift swap request withdrawal validation rules

Use this validation rule to set a condition that you want validated in approved shift swap withdrawal requests.

- **Request complies with filing rules.** This rule is violated if the withdrawal request submittal date violates any of the filing rules applicable to the requester's organization.

Related topics

Define validation rules for shift swap requests, page 93

Create a filing rule for shift swap requests

You can create a filing rule to specify when shift swap requests must be submitted. When shift swap requests are submitted, a validation rule verifies that the requests comply with the filing rule.

> If the following shift swap request validation rule is not selected, the filing rule is not effective:
>
> Request complies with filing rules.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Filing Rules**.
2. In the left pane, click an organization.
3. Click **Create New Rule**.
4. Click **Shift Swap**.
5. In the **Filing Rules** workspace, complete the settings.
6. Click **Save**.

Related topics

Approved shift swap withdrawal request filing rule settings, page 99
Recommended workflow: Set up shift swap requests, page 89

Shift swap request filing rule settings

Use these settings to create a filing rule for shift swap requests.

Location:

These settings are located on the **Filing Rules** page when the selected request type is Shift Swap. This page is on **Organization Management**, under **Request Management**.

Settings

Field	Description
Shift Swap Requests affected by this rule	Specifies which requests are affected: • All requests of this type (default setting) • For (specific date and time range)
Request must be filed	Specifies when the request must be filed. Options are: • Request must be submitted on, before, or after a specific date and time • Request must be submitted by a specific time period relative to the date of the requested shift swap.

Field	Description
Apply to sub-orgs	Specifies whether this rule applies only to the organization or to the organization and its suborganizations.

Related topics

Create a filing rule for shift swap requests, page 97

Create a filing rule for approved shift swap withdrawal requests

You can create a filing rule to specify when approved shift swap withdrawal requests must be submitted. When these requests are submitted, a validation rule verifies that the requests comply with the filing rule.

After a rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

> If the following Approved Shift Swap Withdrawal validation rule is not selected, the filing rule is not effective:
>
> Request complies with filing rules.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Filing Rules**.
2. In the left pane, click an organization.
3. Click **Create New Rule**.
4. Click **Approved Shift Swap Withdrawal**.
5. In the **Filing Rules** workspace, complete the settings.
6. Click **Save**.

Related topics

Approved shift swap withdrawal request filing rule settings, page 99

Recommended workflow: Set up shift swap requests, page 89

Approved shift swap withdrawal request filing rule settings

Use these settings to create a filing rule for approved time-off withdrawal requests.

Location

These settings are on the **Filing Rules** page when the selected request type is Approved Shift Swap Withdrawal. This page is located on **Organization Management**, under **Request Management**.

Settings

Field	Description
Request must be filed	Specifies the request must be submitted by a specific time period relative to the date of the scheduled shift swap.
Apply to sub-orgs	Specifies whether this rule applies only to the organization or to the organization and its suborganizations.

Related topics

Create a filing rule for approved shift swap withdrawal requests, page 99

Create an autoprocessing rule for shift swap requests

While shift swap requests can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule can be used to approve and deny requests based on the shift bidding validation rules that you defined.

After an autoprocessing rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Autoprocessing**.
2. On the **Autoprocessing** list page, click **Create New Rule**.
3. On the **Create New Autoprocessing Rule** popup, click **Shift Swap**.

   The **Autoprocessing** rule form is displayed.
4. Optional: Under **Apply to sub-orgs**, click a sub-org option.
5. Under **Shift Swap Requests affected by this rule**, click one of the options.
6. Under **Autoprocessing Criteria**, do the following to set up autoprocessing criteria for approval and denial:
   a. Based on the autoprocessing action you want to define, select one of the following check boxes:
      - **Approval Criteria**
      - **Denial Criteria**

   b. Click one of the autoprocessing options.

   c. If you selected the option that requires validation rules for the auto-processing criteria, select one or more of the rules shown in **bold**. This convention indicates which validations rules are configured for this organization. If you select any other rules, they are ignored.

   d. Repeat Step 6 until you have completed the auto-processing criteria for all actions that you want to use for this request type.
7. Click **Save**.

Related topics

Shift swap autoprocessing rule settings, page 101

Recommended workflow: Set up shift swap requests, page 89

Shift swap autoprocessing rule settings

Autoprocessing rule settings define whether the rule applies to suborganizations, which flex time requests are affected, and the auto-processing criteria.

Location

These settings are on the **Autoprocessing** page when the Create New Autoprocessing Rule type is Shift Swap. This page is on **Organization Management**, under **Request Management**.

Apply to sub-orgs section

This section provides options to exclude or include suborganizations from this rule.

Field	Description
Apply to this org only	Rule applies only to the organization, and not to its suborganizations.
Apply to sub-orgs (no overrides)	Rule applies to the organization and its sub-organizations. The suborganizations cannot change the status of the rule or edit it.
Apply to sub-orgs (allow overrides)	Rule applies to the organization and its sub-organizations. The suborganizations can change the status of the rule, but cannot edit it.

Shift Swap Requests affected by this rule

This section provides options to limit which requests are auto-processed.

Field	Description
All requests of this type	All shift swap requests are autoprocessed for approval. No restrictions are applied.
For (date range)	Only shift swap requests submitted for the specified date range are autoprocessed for approval.

Autoprocessing Criteria - Approval section

Use this section to select auto-processing criteria for request approval. This section varies based on request type.

Field	Description
Approval Criteria	When selected, autoprocessing approves requests based on the selected criteria.
The following three auto-approve options are available.	
Do not auto approve any requests	No requests are automatically approved. All requests must be approved manually.
Approve requests with no violations	Only requests that do not violate any validation rules configured for this request type are auto-approved.
Approve requests violating only:	The following requests are auto-approved: • Requests that do not violate any validation rules configured for this request type. • Requests that only violate the validation rules selected for approval criteria.

Autoprocessing Criteria - Denial

Field	Description
Denial Criteria	When selected, auto-denial is used to process requests based on the selected criteria.
The following auto-deny options are available.	
Do not auto deny any requests.	No requests are automatically denied. All requests must be denied manually.
Deny requests with at least one violation.	Requests that violate *any* validation rules configured for this request type are automatically denied.
Deny requests violating:	Requests that violate the *selected* validation rules are automatically denied.

Related topics

Create an autoprocessing rule for shift swap requests, page 101

Create an autoprocessing rule for approved shift swap withdrawal requests

While approved shift swap withdrawal requests can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule can be used to approve and deny requests based on the validation rules that you set.

After an autoprocessing rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

Procedure

1 Go to **Organization Management**. Under **Request Management**, select **Autoprocessing**.

2 On the **Autoprocessing** list page, click **Create New Rule**.

3 On the **Create New Autoprocessing Rule** popup, click **Approved Shift Swap Withdrawal**.

4 In the left pane of the **Auto Processing** rule form, click an organization.

5 Optional: Under **Apply to sub-orgs**, click a sub-org option.

6 Under **Approved Shift Swap Withdrawal Requests affected by the rule your are creating**, click one of the options.

7 Under **Autoprocessing Criteria**, do the following to set up autoprocessing criteria for approval and denial:

   a. Based on the autoprocessing action you want to define, select one of the following check boxes:

      - **Approval Criteria**
      - **Denial Criteria**

   b. Click one of the auto-processing options.

   c. If you selected the option that requires validation rules for the auto-processing criteria, select one or more of the available rules.

   d. Repeat Step 7 until you have completed the auto-processing criteria for all actions that you want to use for this request type.

8 Click **Save**.

Related topics

Approved shift swap withdrawal autoprocessing rule settings, page 105

Recommended workflow: Set up shift swap requests, page 89

Approved shift swap withdrawal autoprocessing rule settings

Autoprocessing rule settings define whether the rule applies to suborganizations, which shift swap requests are affected, and the auto-processing criteria.

Location

These settings are on the **Autoprocessing** page when the Create New Autoprocessing Rule type is Approved Shift Swap Withdrawal. This page is on **Organization Management**, under **Request Management**.

Apply to sub-orgs section

This section provides options to exclude or include suborganizations from this rule.

Field	Description
Apply to this org only	Rule applies only to the organization, and not to its suborganizations.
Apply to sub-orgs (no overrides)	Rule applies to the organization and its sub-organizations. The suborganizations cannot change the status of the rule or edit it.
Apply to sub-orgs (allow overrides)	Rule applies to the organization and its sub-organizations. The suborganizations can change the status of the rule, but cannot edit it.

Approved Shift Swap Withdrawal Requests affected by the rule you are creating

This section provides options to limit which requests are auto-processed.

Field	Description
All requests of this type	All requests are auto-processed for approval. No restrictions are applied.
For (date range)	Only requests submitted for the specified date range are autoprocessed for approval.

Autoprocessing Criteria - Approval section

Use this section to select autoprocessing criteria for request approval.

Field	Description
Approval Criteria	When selected, auto-processing approves requests based on the selected criteria.
The following three auto-approve options are available.	

Field	Description
Do not auto approve any requests	No requests are automatically approved. All requests must be approved manually.
Approve requests with no violations	Only requests that do not violate any validation rules configured for this request type are auto-approved.
Approve requests violating only:	The following requests are auto-approved: • Requests that do not violate any validation rules configured for this request type. • Requests that only violate the validation rules selected for approval criteria.

Autoprocessing Criteria - Denial

Field	Description
Denial Criteria	When selected, auto-denial is used to process requests based on the selected criteria.
The following auto-deny options are available.	
Do not auto deny any requests.	No requests are automatically denied. All requests must be denied manually.
Deny requests with at least one violation.	Requests that violate *any* validation rules configured for this request type are automatically denied.
Deny requests violating:	Requests that violate the *selected* validation rules are automatically denied.

Related topics

Create an autoprocessing rule for shift swap requests, page 101

Setting up shift requests & changes

With the shift request & change feature, employees can request shifts on unscheduled days and request changes to their existing shifts.

Employees can do the following:

- Create shift requests for days when they are not scheduled to work.
- Change shift start time.
- Choose different shifts.
- Create overtime requests.
- Create requests to add overtime extensions or regular time extensions at the start of or end of existing shifts.
- Create requests to withdraw approved requests.

Topics

Recommended workflow: Set up shift requests & changes

With the shift request & change feature, employees can request shifts on unscheduled days and request changes to their existing shifts. When needed, employees can submit a request to withdraw an approved request.

This workflow describes the procedures for setting up shift requests & changes using all system features. Follow the procedures that fit the needs of your organization.

Workflow

1. Define settings shared by all request types, page 15

   Shared request settings are optional settings that are effective for all request types.

2. Define settings for shift requests & changes, page 109

   Shift requests & change settings control who can submit these requests and what types of requests can be made.

3. Create policies for shift requests & changes, page 112

   Shift request & changes policies provide guidance to employees about submitting requests. Employees can view this information on the Policies page. This page is on My Home, under My Requests.

4. Define validation rules for shift requests & changes , page 113

   Validation rules verify that requests meet the conditions that you specify. Rules can be defined for both shift requests & changes and approved shift request & changes withdrawal requests.

5. Create filing rules.

   - Create a filing rule for shift requests & changes, page 116

     You can create a filing rule to specify when shift requests & changes must be submitted. When these requests are submitted, a validation rule verifies that they comply with the filing rule.

   - Create a filing rule for approved shift request & change withdrawal requests, page 118

     You can create a filing rule to specify when approved shift request & change withdrawal requests must be submitted. When these requests are submitted, a validation rule verifies that these requests comply with the filing rule.

6. Create autoprocessing rules.

   - Create an autoprocessing rule for shift requests & changes, page 120

     While shift requests & changes can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule can be used to approve and deny requests based on violation of validation rules.

   - Create an autoprocessing rule for approved shift request & change withdrawal requests, page 123

     While approved shift request & change withdrawal requests can be processed manually, you can set up a rule for the system to process them automatically. An autoprocessing rule can be used to approve and deny requests based on the validation rules that you set.

Define settings for shift requests & changes

Shift requests & change settings control who can submit these requests and what types of requests can be made.

Procedure

1 Go to **Organization Management**. Under **Request Management**, select **Settings**.

2 From the **Organization Name** pane, click an organization.

3 Define the Shift Requests & Changes organization settings.

4 To save these settings, do one of the following:

- Click **Save and apply to sub-orgs**.
- Click **Save**.

Related topics

Shift requests & changes settings, page 109

Recommended workflow: Set up shift requests & changes, page 108

Shift requests & changes settings

The shift requests & changes settings make the shift request & shift change features available and define which types of these requests can be submitted.

Location

These settings are on the **Settings** page. This page is on **Organization Management**, under **Request Management**.

Settings	Description
Enable Shift Requests & Changes	If one of the following options is selected, the shift request & changes settings become available: • **Allow requests for new shifts**: *Employees* and *supervisors* can submit requests for new shifts. • **Allow requests for changes to existing shifts**: *Employees* and *supervisors* can submit requests for changes to shifts that have already been scheduled.
Allow requests for regular (non-overtime) shifts	Requests can be made for new shifts.
Allow requests for overtime shifts	Requests can be created for overtime shifts.

Settings	Description
Allow requests for regular (non-overtime) extensions before a shift	Can create a request for extra regular time before the *beginning* of an existing shift.
Allow requests for regular (non-overtime) extensions after a shift	Can create a request for regular time after the *end* of an existing shift.
Allow requests for regular (non-overtime) extensions during a gap	Can create a request for regular time before the *start* of an existing shift.
Allow requests for overtime extensions before a shift	Can create requests for an overtime extension before the start of an existing shift.
Allow requests for overtime extensions after a shift	Can create requests for an overtime extension after the end of an existing shift.
Enforce the duration for overtime extension requests	• If this check box is clear, the value set for the **Duration** (Length) of the overtime extension in the work rules is not enforced. Users can change the value to anything from 1 minute to 24 hours when submitting a Shift Change request. Employees (agent role) can edit this value on their My Requests page and the Schedule page. Some non-agent roles, such as Supervisor, can edit this value for an employee on the Schedule page and the Employee Requests page. • If this check box is selected, the value for the **Duration** (Length) is enforced in Shift Change requests. Users cannot edit the Duration. The value of the **Duration** (Length) of the overtime extension is defined on the **OT Extension** page. (This page is on **Work Administration**, under **Work Rules**.)

<table>
<tr><th>Settings</th><th>Description</th></tr>
<tr><td>Enforce the gap for overtime extension requests</td><td>If this check box is clear, the value for the Min Gap and Max Gap of the overtime extension is not enforced. Users can change the value to anything from 1 minute to 12 hours. Employees (agent role) can edit this value on their My Requests page and the Schedule page. Some non-agent roles, such as Supervisor, can edit this value for an employee on the Schedule page and the Employee Requests page.
If this check box is selected, the values set for the Min Gap and Max Gap of the overtime extension are enforced. When requesting an overtime extension, users can change these gap values to any value between the Min Gap and the Max Gap. Employees (agent role) can edit this value on their My Requests page and the Schedule page. Some non-agent roles, such as Supervisor, can edit this value for an employee on the Schedule page and the Employee Requests page.
Example - Create a new request form: If the work rule has a Min Gap of 15 minutes and a Max Gap of 1 hour, the user cannot select a Min Gap value lower than 15 or a Max Gap value higher than one hour.
Net Staffing Ribbon behavior: If users draw the gap on the net staffing ribbon, the value populated on the request form varies based on whether the gap drawn is inside the Min Gap and Max Gap values.
If the user draws a gap that is inside the Min Gap and Max Gap values, the request form is populated with the gap.
If the user draws a gap lower than the Min Gap value, the request form is populated with the Min Gap value.
If the user draws a gap that is higher the Max Gap value, the request form is populated with the Max Gap value.
The value of the Min Gap and Max Gap of the overtime extension is defined on the OT Extension page. (This page is on Work Administration, under Work Rules.)</td></tr>
<tr><td>Allow start time modifications for existing shifts</td><td>If this check box is clear, employees cannot change the start time of an existing shift. Employees can still submit requests for new shifts and shift extensions.</td></tr>
</table>

Related topics

Define settings for shift requests & changes, page 109

Create policies for shift requests & changes

Shift request & changes policies provide guidance to employees about submitting requests. Employees can view this information on the **Policies** page. This page is on **My Home**, under **My Requests**.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Settings**.
2. From the **Organization Name** pane, click an organization.
3. Under the **Shift Requests & Changes Policies** section, type the information you want employees to know about submitting requests.
4. To save, do one of the following:
   - Click **Save and apply to sub-orgs**.
   - Click **Save**.

Related topics

Shift request & change policies, page 112

Recommended workflow: Set up shift requests & changes, page 108

Shift request & change policies

Text box to type information that you want employees to know about submitting shift requests & changes. Employees can view your policies on the **Policies** page. This page is on **My Home**, under **My Requests** page.

Location

Policies are entered on the **Settings** page. This page is on **Organization Management**, under **Request Management**.

Related topics

Create policies for shift requests & changes, page 112

Define validation rules for shift requests & changes

Validation rules verify that requests meet the conditions that you specify. Rules can be defined for both shift requests & changes and approved shift request & changes withdrawal requests.

Each validation rule has an icon. When a request violates a validation rule, the icon is displayed on the following pages:

- **Employees Request**: Employees that manage requests submitted by others use this page.
- **My Request**: Employees manage their own requests from this page.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Validation**.
2. In the left pane, select an organization.
3. Under the **Shift Requests & Changes Validation rules** section, define the validation rule that you want to use.
    a. Select the check box.
    b. When needed, complete the rule values. (Example: number of minutes, hours, or days)
4. Under the **Approved Shift Requests & Changes Withdrawal Validation rules** section, select the check box.
5. Do one of the following:
    - Click **Save**.
    - Click **Save and Apply to Sub-Orgs**.

Related topics

Shift requests & changes validation rules, page 113

Approved shift request & change withdrawal request validation rules, page 115

Recommended workflow: Set up shift requests & changes, page 108

Shift requests & changes validation rules

Use any of these validation rules to set conditions that you want validated in shift requests and changes.

- **A minimum of**<*x*> **percent of changed intervals improves net staffing.** This rule is violated when the percentage of intervals that will be changed by the request is less than the specified minimum percentage for net staffing improvement. Gaps between shifts and extensions are not included.

  The minimum staffing level percentage is calculated as follows:

  Improvement Percentage = (#periods where net staffing is improved / (#periods where net staffing is improved + #periods where net staffing is worsened))*100

- **Maximum shift duration allowed:** <*number*> **minutes per** <**Organization Day** or **24 Hour Period**>**.** This rule is violated if the request causes the shift to exceed the user-defined shift duration allowed for the specified period. Only paid hours are considered (normal shifts, overtime, overtime extensions and non-overtime extensions). Shift length is not considered.

- **Minimum shift duration allowed:** <*number*> **minutes per** <**Organization Day** or **24 Hour Period**>**.** This rule is violated if the request causes the employee to fall under the user-defined shift duration allowed for the selected period. Only paid hours are considered (normal shifts, overtime, overtime extensions and non-overtime extensions). Shift length is not considered.
- **Maximum consecutive working days allowed as per organization Settings.** This rule is violated if the request causes the user to exceed the maximum number of consecutive working days that has been defined for the organization.
- **Minimum required time gap between consecutive shifts as per organization Settings.** This rule is violated if approving the shift change request results in the minimum time gap between shifts being violated. The time gap is determined by comparing the start time of the requested shift with the end time of the preceding shift; in addition the end time of the requested shift is checked against the start time of the succeeding shift.
- **Request complies with filing rules.** This rule is violated if the request submittal date violates any of the filing rules applicable to the employee's organization.
- **Employee's schedule complies with min/max hours, including OT maximums.** This rule is violated if approving the request causes the employee not to meet or to exceed the minimum or maximum hours allowed respectively, including the maximum overtime allowed per day/week.
- **Employee's schedule complies with organization hours of operation.** This rule will generate an alert if approving the request causes the employee's working hours to fall outside the defined hours of operation for the organization.
- **Request does not overlap with a time off event.** This rule is violated if the request overlaps with a time-off event.
- **Request does not overlap with an unavailability.** This rule is violated if the shift change request overlaps with an unavailability.
- **Request period is published.** This rule is violated if the request date and time range falls outside a published period. If any part of the shift is outside a published period, the validation fails.
- **Request complies with Required Pay Period Hours.** This rule is violated if the request would cause the employee to not meet the minimum hours in a pay period.

  Tracking for the Required Pay Period Hours is set up on the **Setting**s page. This page is on **Organization Management**, under **Request Management**. When this setting is selected for an employee's organization, the Required Hours (balance) for Pay Period section is available on the following pages:

  - **Time Summary**: This page is located on **Tracking**, under **Roster**.
  - **My Schedule Summary**: This page is located on **My Home**, under **My Schedule**.

Related topics

Define validation rules for shift requests & changes , page 113

Approved shift request & change withdrawal request validation rules

Use this validation rule to set a condition that you want validated in withdrawal requests.

- **Request complies with filing rules.** This rule is violated if the withdrawal request submittal date violates any of the filing rules applicable to the requester's organization.

Related topics

Define validation rules for shift requests & changes , page 113

Create a filing rule for shift requests & changes

You can create a filing rule to specify when shift requests & changes must be submitted. When these requests are submitted, a validation rule verifies that they comply with the filing rule.

After a rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

> If the following shift request & changes validation rule is not selected, the filing rule is not effective:
>
> Request complies with filing rules.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Filing Rules**.
2. In the left pane, click an organization.
3. Click **Create New Rule**.
4. Click **Shift Request & Change**.
5. In the **Filing Rules** workspace, complete the settings.
6. Click **Save**.

Related topics

Shift request & changes filing rule settings, page 116

Recommended workflow: Set up shift requests & changes, page 108

Shift request & changes filing rule settings

Use these settings to create a filing rule for shift requests & changes.

Location

These settings are on the **Filing Rules** page when the selected request type is Shift Request & Change. This page is on **Organization Management**, under **Request Management**.

Settings

Field	Description
Shift Requests and Changes affected by this rule	Specifies which types of regular and overtime requests are affected.

Field	Description
Requested Dates	Specifies which requests are affected based on the request date: • All requests of this type (default setting) • For (limited to requests that start between a specific date and time range)
Request must be filed	Specifies when the request must be filed. Options are: • Request must be submitted on, before, or after a selected date and time • Request must be submitted by a specific time period relative to the date of the requested time-off.
Apply to sub-orgs	Specifies whether this rule applies only to the organization or to the organization and its suborganizations.

Related topics

Create a filing rule for shift requests & changes, page 116

Create a filing rule for approved shift request & change withdrawal requests

You can create a filing rule to specify when approved shift request & change withdrawal requests must be submitted. When these requests are submitted, a validation rule verifies that these requests comply with the filing rule.

After a rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

> If the following approved shift requests & changes validation rule is not selected, the filing rule is not effective:
>
> Request complies with filing rules.

Procedure

1 Go to **Organization Management**. Under **Request Management**, select **Filing Rules**.

2 In the left pane, click an organization.

3 Click **Create New Rule**.

4 Click **Approved Shift Request & Change Withdrawal**.

5 In the **Filing Rules** workspace, complete the settings.

6 Click **Save**.

Related topics

Approved shift request & change request withdrawal filing rule settings, page 118

Recommended workflow: Set up shift requests & changes, page 108

Approved shift request & change request withdrawal filing rule settings

Use these settings to create a filing rule for approved shift request & change withdrawal requests.

Location

These settings are on the **Filing Rules** page when the selected request type is Approved Shift Request & Change Withdrawal. This page is on **Organization Management**, under **Request Management**.

Settings

Field	Description
Approved Shift Request & Change Withdrawal Requests affected by the rule you are creating	Specifies which types of regular and overtime requests are affected.
Request must be filed	Specifies the request must be filed by a specific time period relative to the date of the requested shift request.
Apply to sub-orgs	Specifies whether this rule applies only to the organization or to the organization and its suborganizations.

Related topics

Create a filing rule for approved shift request & change withdrawal requests, page 118

Create an autoprocessing rule for shift requests & changes

While shift requests & changes can be processed manually, you can set up a rule for the system to process them automatically. An auto-processing rule can be used to approve and deny requests based on violation of validation rules.

If the autoprocessing criteria results in a request that can be both approved and denied, the request is processed with a Pending Approval status.

After an autoprocessing rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Autoprocessing**.
2. On the **Autoprocessing** list page, click **Create New Rule**.
3. On the **Create New Autoprocessing Rule** popup, click **Shift Request & Change**.
4. In the left pane, click an organization.
5. Optional: Under **Apply to sub-orgs**, click a sub-org option.
6. Under **Shift Requests & Changes affected by this rule**, click one of the options.
7. Under **Autoprocessing Criteria**, do the following to set up autoprocessing criteria for approval and denial:
    a. Based on the autoprocessing action you want to define, select one of the following check boxes:
        - **Approval Criteria**
        - **Denial Criteria**

    b. Click one of the autoprocessing options:
    c. If you selected the option that requires validation rules for the autoprocessing criteria, select one or more of the rules shown in **bold**. This convention indicates which validations rules are configured for this organization. If you select any other rules, they are ignored.
    d. Repeat Step 7 until you have completed the autoprocessing criteria for all actions that you want to use for this request type.
8. Click **Save**.

Related topics

Shift request & change autoprocessing settings, page 121

Recommended workflow: Set up shift requests & changes, page 108

Shift request & change autoprocessing settings

Autoprocessing rule settings define whether the rule applies to suborganizations, which requests are affected, and the autoprocessing criteria.

Location

These settings are on the **Autoprocessing** page when the Create New AutoProcessing Rule type is Shift Request & Change. This page is on **Organization Management**, under **Request Management**.

Apply to sub-orgs section

This section provides options to exclude or include suborganizations from this rule.

Field	Description
Apply to this org only	Rule applies only to the organization, and not to its suborganizations.
Apply to sub-orgs (no overrides)	Rule applies to the organization and its suborganizations. The suborganizations cannot change the status of the rule or edit it.
Apply to sub-orgs (allow overrides)	Rule applies to the organization and its suborganizations. The suborganizations can change the status of the rule, but cannot edit it.

Shift Requests & Changes affected by this rule

This section provides options to limit which requests are autoprocessed.

Field	Description
(type of regular or overtime requests)	Only the selected regular time and overtime requests types are auto-processed for approval. Any or all the following types can be selected: • Regular time: New Shift and Shift Change • Overtime: New Shift and Shift Change
All requests of this type	All requests are autoprocessed. No restrictions are applied.
For (date range)	Only requests submitted for the specified date range are autoprocessed.

Auto-Processing Criteria - Approval section

Use this section to select auto-processing criteria for request approval. This section varies based on request type.

Field	Description
Approval Criteria	When selected, autoprocessing approves requests based on the selected criteria.
The following three auto-approve options are available.	
Do not auto approve any requests	No requests are automatically approved. All requests must be approved manually.
Approve requests with no violations	Only requests that do not violate any validation rules configured for this request type are autoapproved.
Approve requests violating only:	The following requests are auto-approved: • Requests that do not violate any validation rules configured for this request type. • Requests that only violate the validation rules selected for approval criteria.

Auto-Processing Criteria - Denial

Field	Description
Denial Criteria	When selected, auto-denial is used to process requests based on the selected criteria.
The following auto-deny options are available.	
Do not auto deny any requests.	No requests are automatically denied. All requests must be denied manually.
Deny requests with at least one violation.	Requests that violate *any* validation rules configured for this request type are automatically denied.
Deny requests violating:	Requests that violate the *selected* validation rules are automatically denied.

Related topics

Create an autoprocessing rule for shift requests & changes, page 120

Create an autoprocessing rule for approved shift request & change withdrawal requests

While approved shift request & change withdrawal requests can be processed manually, you can set up a rule for the system to process them automatically. An autoprocessing rule can be used to approve and deny requests based on the validation rules that you set.

After an autoprocessing rule has been created for an organization, you can copy it to another organization to save time. The **copy to** organization becomes an owner organization of the rule too (as if the rule was created by the organization).

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Auto Processing**.
2. In the left pane, click an organization.
3. On the **Autoprocessing** list page, click **Create New Rule**.
4. On the **Create New Autoprocessing Rule** popup, click **Approved Shift Request & Change Withdrawal**.

   The **Autoprocessing** rule form is displayed.
5. Optional: Under **Apply to sub-orgs**, click another sub-org option.
6. Under **Approved Shift Request & Change Withdrawal Requests affected by this rule**, click any or all of the options.
7. Optional: Under **Requested Dates**, select the other option.
8. Under **Autoprocessing Criteria**, do the following to set up auto-processing criteria for approval and denial:
   a. Based on the autoprocessing action you want to define, select one of the following check boxes:
      - **Approval Criteria**
      - **Denial Criteria**

   b. Click one of the autoprocessing options:
   c. If you select the option that requires validation rules for the autoprocessing criteria, select one or more rules shown in **bold**. This convention indicates which validation rules are configured for this organization. If you select any other rules, they are ignored.
   d. Repeat Step 8 until you have completed the autoprocessing criteria for all actions that you want to use for this request type.
9. Click **Save**.

Related topics

Approved shift request & change withdrawal autoprocessing rule settings, page 124

Recommended workflow: Set up shift requests & changes, page 108

Approved shift request & change withdrawal autoprocessing rule settings

Autoprocessing rule settings define whether the rule applies to suborganizations, which requests are affected, and the auto-processing criteria.

Location

These settings are on the **Autoprocessing** page when the Create New AutoProcessing Rule type is Approved Shift Request & Change. This page is on **Organization Management**, under **Request Management**.

Apply to sub-orgs section

This section provides options to exclude or include suborganizations from this rule.

Field	Description
Apply to this org only	Rule applies only to the organization, and not to its suborganizations.
Apply to sub-orgs (no overrides)	Rule applies to the organization and its sub-organizations. The suborganizations cannot change the status of the rule or edit it.
Apply to sub-orgs (allow overrides)	Rule applies to the organization and its sub-organizations. The suborganizations can change the status of the rule, but cannot edit it.

Approved Shift Request & Change Withdrawal Requests affected by this rule

This section provides options to limit which requests are auto-processed.

Field	Description
(type of regular or overtime requests)	Only the selected regular time and overtime requests types are autoprocessed. Any or all the following types can be selected: • Regular time: New Shift and Shift Change • Overtime: New Shift and Shift Change
All requests of this type	All requests are autoprocessed. No restrictions are applied.
For (date range)	Only requests submitted for the specified date range are autoprocessed.

Auto-Processing Criteria - Approval section

Use this section to select auto-processing criteria for request approval. This section varies based on request type.

Field	Description
Approval Criteria	When selected, auto-processing approves requests based on the selected criteria.
The following three auto-approve options are available.	
Do not auto approve any requests	No requests are automatically approved. All requests must be approved manually.
Approve requests with no violations	Only requests that do not violate any validation rules configured for this request type are auto-approved.
Approve requests violating only:	The following requests are auto-approved: • Requests that do not violate any validation rules configured for this request type. • Requests that only violate the validation rules selected for approval criteria.

Auto-Processing Criteria - Denial

Field	Description
Denial Criteria	When selected, auto-denial is used to process requests based on the selected criteria.
The following auto-deny options are available.	
Do not auto deny any requests.	No requests are automatically denied. All requests must be denied manually.
Deny requests with at least one violation.	Requests that violate *any* validation rules configured for this request type are automatically denied.
Deny requests violating:	Requests that violate the *selected* validation rules are automatically denied.

Related topics

Create an autoprocessing rule for approved shift request & change withdrawal requests, page 123

Recommended workflow: Set up shift requests & changes, page 108

Chapter 8

Creating auto breaking rules

Auto breaking rules automatically change where non-work shift events are placed in an approved request that adds or removes time from a shift.

Topics

Auto breaking rules overview

Auto breaking rules specify where non-work shift events are automatically placed when a request that adds or removes time from a shift is approved. Any or all request types can be included in an auto breaking rule. These rules are effective regardless of how the request is approved (whether by auto processing approval, manual approval, or waitlist scan).

Except for Shift Request & Change, all request types can include withdrawals in the rule. When a Shift Request and Change withdrawal is approved, the original shift is restored.

Different auto breaking rules can apply to each side of a shift swap request due to different shift lengths or organization assignments for the employees.

Auto breaking rules do not apply to schedule changes using other tools and system features such as Time off Calendar, Mass Schedule Editor, or Schedule Import.

Parts of an auto breaking rule

In addition to a rule name, an auto breaking rule has three parts that must be completed:

1. One or more request types (including time off types for time off requests and flex time requests).
2. A continuous shift length between <hh:mm> and <hh:mm>.

   Continuous shift length is the length of a shift not covered by time off or a shift/overtime gap.
3. The shift used as a template for the automatic placement of non-work shift events.

The combination of these three parts creates an auto processing rule that can be expressed in the following way:

> If <one or more of the selected request types> creates a continuous shift length between <hh:mm> and <hh:mm>, then use the selected shift as a template and apply the associated non-working shift events.

Requests eligible for auto breaking

Requests types included in an auto breaking rule in the requesting employee's organization scope are eligible for auto breaking.

Shifts eligible for auto breaking

Shifts that use non-working shift events that can occur either *any time* or *relative to the start of the shift* are eligible for auto breaking. Shifts that use *absolute* non-working shift events are not eligible for auto breaking.

Conflict checking when a rule is created

When an auto breaking rule is created for an organization, the system checks to see if the new rule conflicts with an existing rule in the organization. A conflict occurs when the request type matches and the continuous shift length overlaps. If the status of the existing rule is changed to inactive, another rule can be created in the same organization with a matching request type (or types) and an overlapping continuous shift length. If the status of the existing rule is changed back to active, the system identifies a conflict and prevents the status change.

Rule selection during the approval process

Both a parent organization and a suborganization can create a rule with matching request types and overlapping continuous shift lengths. When a request is being processed for approval, the auto breaking rule created in the nearest organization to the employee's organization is selected. The selected rule could have been created in either the employee's organization or another organization higher in the organization scope tree.

Basic process overview

The following table provides a high-level description of the process for an auto breaking rule. This overview is a simple example, and is based on default roles and privileges.

Stage	Description
1	The administrator creates an auto breaking rule for the Alpha organization that includes any or all request types.
2	An employee in the Alpha organization submits a request that adds or removes time from a shift.
3	During the approval process: The system checks the request to determine if it is eligible for approval. • If the request is NOT eligible for approval, then the auto breaking rule is not triggered. • If the request is eligible for approval and the shift is eligible for auto breaking, then the auto breaking rule is triggered. When the auto breaking rule is triggered, the system checks the request to see if it meets the continuous shift length condition specified in the rule. • If the request does NOT meet the continuous shift length, then placement of non-work shift events is not changed. • If the request meets the continuous shift length, then the shift specified in the rule is used as a template and the associated non-working shift events are applied.
4	• The system updates the calendar. Shifts changed by any auto breaking rule are updated and locked. • The system adds a comment that describes the auto breaking action in the employee request.

Example 1: Time off request updated by an auto breaking rule

The employee's shift is four hours (1 PM - 5 PM) with a paid, 15-minute break.

Action by	Description
Employee	Employee requests two hours (3 PM - 5 PM) of vacation during this shift.
System	Removes the paid, 15-minute break. The employee must work four consecutive hours to receive a paid break.

Example 2: Shift Request & Change updated by an auto breaking rule

The employee's shift is four hours (8 AM - noon) with a scheduled paid, 15-minute break.

Action by	Description
Employee	Requests two more hours at the end of their shift. Total shift is six hours (8 AM - 2 PM).
System	Adds an unpaid, 30-minute lunch along with the already scheduled paid, 15-minute break.

Example 3: Shift Request & Change updated by an auto breaking rule

The employee's shift is four hours (8 AM - noon) with a scheduled paid, 15-minute break.

Action by	Description
Employee	Requests an additional hour (7 AM - 8 AM) before their shift. The shift totals five hours (7 AM - noon).
System	The system makes no change to the breaks in the shift. The shift met the continuous shift length condition in the auto breaking rule; however, the shift template provides one paid, 15-minute break for a shift of five consecutive hours.
Then, employee requests another shift change.	
Employee	Requests two additional hours (noon - 2 PM) after the shift. The shift totals six hours (7 AM - 2 PM).
System	Adds an unpaid, 30-minute lunch in addition to the scheduled paid, 15-minute break.

Example 4: Shift request & change updated by an auto breaking rule

The employee's shift is four hours (5 PM - 9 PM) with a scheduled paid, 15-minute break.

Action by	Description
Employee	Requests an additional two hours (9 PM - 11 PM) at the end of the shift. The shift totals six hours (5 PM - 11 PM).
System	Adds an unpaid, 30-minute lunch along with the already scheduled paid, 15-minute break.

Action by	Description
Next, the employee submits a withdrawal request.	
Employee	Requests to withdraw the two hours (9 PM - 11 PM) from the shift. Now the shift totals four hours (5 PM to 9 PM).
System	Removes the unpaid, 30-minute lunch. Leaves the scheduled paid, 15-minute break.
Next, the employee creates a gap in the schedule.	
Employee	Requests four hours earlier on the same day (8 AM - noon) and keeps the four hours in the evening (5 PM - 9 PM).
System	Adds a paid, 15-minute break to the mornings shift (8 AM - noon). No changes are made to the shift from 5:00 PM and 9 PM.
Next, the employee fills the gap.	
Employee	Requests two additional hours (noon - 2 PM) at the end of their morning shift and keeps the four hours in the evening. The first shift is now a total of six hours (8 AM - 2 PM).
System	Adds an unpaid, 30-minute lunch in addition to a paid, 15-minute break between 8 AM and 2 PM. No changes are made to the morning shift. It still has one paid, 15-minute break.

Related topics

Create an auto breaking rule , page 131

Auto breaking list page, page 131

Auto breaking page, page 132

Create an auto breaking rule

Auto breaking rules specify where non-work shift events are automatically placed when a request that adds or removes time from a shift is approved. Depending on the rule definition, non-work shift events, can be automatically moved, added to, or removed from a shift.

After creating a rule, you can change the rule status to inactive by clearing the **Apply** check box on the **Auto Breaking list** page.

Before you begin

Understand how auto breaking rules work.

Auto breaking rules overview, page 127

Procedure

1 Go to **Organization Management**. Under **Request Management**, select **Auto breaking**.

2 From the left pane, select an organization.

3 Define the rule.

   a. Enter a name.

   b. Select one or more request types, and optionally select **Include Withdrawal** when available.

   c. If you selected **Time Off/Flex Time**, select one or more time off types.

   d. Define the continuous shift length, and select the shift template.

   e. Optional: Change the default **Apply to sub-org** option.

   f. Select **Save**.

   The rule is effective until you either change the status or delete it.

Related topics

Auto breaking rules overview, page 127

Create an auto breaking rule , page 131

Auto breaking list page, page 131

Auto breaking page, page 132

Auto breaking list page

On this page, you can manage actions related to auto breaking rules. Auto breaking rules can be created for all request types.

You can do the following:

- Access the rule form to create a rule or edit an existing rule.
- Change the rule from active to inactive for an organization.
- Delete a rule.

Column	Description
Apply	Indicates whether the auto breaking rule applies to an organization. When the check box is clear, the rule is inactive.
Name	Name of the auto breaking rule.
Request Type	Identifies which request type this rule auto breaks.
From	Lowest number of hours in the continuous shift length range.
To	Highest number of hours in the continuous shift length range.
Shift	Shift used as the template for the placement of non-working shift events such as breaks and lunches.
Owner Organization	Organization that created the rule. Only this organization can edit the rule.
Apply to sub-orgs	Indicates whether the rule applies to suborganizations and whether they can override the rule.

Related topics

Auto breaking rules overview, page 127

Create an auto breaking rule , page 131

Auto breaking page, page 132

Auto breaking page

Use this page to create an auto breaking rule or edit an existing auto breaking rule.

Auto breaking rule settings

Setting	Description
Rule name	Descriptive name of the rule.
Request types	Request type options. Any or all request types can be included in a rule.
(*Time off types list boxes*)	Identifies the time off types affected by rules created for time off requests or flex time requests. Time off types in the list are activities that were created with the Used in Request check box selected.

Setting	Description
For a duration of ___ - - ___ hours, use shift ___	Specifies the number of hours and minutes in the continuous shift length segment that triggers changes to the non-work shift events. **First box**: Specifies the lowest number of hours and minutes in the continuous shift length range. **Second box**: Specifies the highest number of hours and minutes in the continuous shift length range. **Third box**: Specifies the shift used as a template for the placement of non-work shift events. Shifts with absolute breaks are not included in the list.
Apply to sub-org	The following options are available: • **Apply to this org only**: Rule applies only to this organization, and not to its suborganizations. • **Apply to sub orgs (no overrides)**: Rule applies to the organization and its suborganizations. The suborganizations cannot change the rule. • **Apply to sub orgs (allow overrides)**: Rule applies to the organization and its suborganizations. The suborganizations can change whether the rule applies to their organization, but cannot edit it.

Related topics

Auto breaking rules overview, page 127

Create an auto breaking rule , page 131

Auto breaking list page, page 131

Chapter 9

Running a shift bidding auction

Using an auction for shift bidding lets employees submit bids for the shifts they prefer. Employee bids can be prioritized based on various criteria including a scoring system of accrued points.

Topics

Recommended workflow: Run a shift bidding auction

With shift bidding, employees can bid on the shifts that they prefer to work. You can factor in seniority, rank, and bonus points so certain employees are more likely to get their preferred shifts.

This workflow shows the process for running a shift bidding auction.

Workflow

1 Create a shift bidding auction, page 137

Using an auction for shift bidding lets employees submit bids for the shifts they prefer. Employee bids can be prioritized based on various criteria including a scoring system of accrued points.

2 View and modify bonus points for schedules , page 144

To encourage employees to bid on unpopular schedules, you can specify bonus points associated with them. These points give the employees a bidding advantage in future auctions.

3 Add employees to an auction using one of the following methods:

- Add employees to an auction one after another, page 146

  To give some employees an advantage in shift bidding, you can automatically add employees to the auction one after another based on a specified order. The employees at the top of the sort order have the opportunity to submit their shift bid before employees lower in the sort order.

- Add employees to an auction at the same time, page 148

  Use this method to add waiting employees to an auction when you want all employees to have equal opportunity to bid on schedules. The employee whose bid is approved first, gets the schedule. Any other bids for the same schedule become an invalid request.

4 Close a shift bidding auction, page 153

When the auction deadline has passed, you can close an auction. Employees cannot submit bids to a closed auction.

5 Approve all shift bid requests without violations, page 196

You can automatically process and approve all shift bid requests. During processing, the first request without a violation is approved. Only one shift bid can be approved for an employee.

6 Delete a shift bidding auction, page 154

When the auction deadline has passed, you can delete a closed auction. You can use this feature to delete an auction that was not configured correctly.

Shift bidding auction options

For the same scheduling period, you have the option of creating a single auction, repeating auctions, continuous bid auctions, or concurrent auctions.

Single auction

- Description: After the bid deadline passes, employees can no longer bid unless the deadline is extended.
- Available to: All auctions (auctions for full period schedules, combination of individual shifts, and multiple shifts per day)
- Required setup: Basic auction setup

Repeating auctions in the same scheduling period

- Description: If the previous auction for the scheduling period is closed with no pending requests, you can create another auction for the scheduling period previously used. After being scheduled, employees can bid again for more hours.
- Available to: Multiple shifts per day auctions
- Required setup: Auction must include the **Previously Scheduled Employees** option.

Continuous bid auction

- Description: Employees can continue to bid on available shifts and have multiple bids approved until their deadline passes. One bid per employee may be approved per group approval action to ensure that shift selections are evenly awarded.
- Available to: Combination of individual shifts auctions and multiple shifts per day auctions
- Required setup: Auction must include the **Previously Scheduled Employees** and **Continuous Bid** options.

Concurrent auctions in the same scheduling period

- Description: You can create auctions in the same schedule period that are open at the same time. Concurrent auctions have the following benefits:
  - Employees who are bidding only view the schedules in the auction they are in.
  - Employees who are processing requests can create a Shift Bidding filter for the Employee Requests page that only shows the selected auctions.
- Available to: Auctions for full period schedules
- Required setup: Concurrent auctions must have either a unique selection for Organization(s) or Employee Type. If you create a subsequent auction for a scheduling period and either the selected organizations or employee types overlap with an existing auction, you cannot save the new auction.

Related topics

Create a shift bidding auction, page 137

Schedule Auctions: Settings page, page 138

Create a shift bidding auction

Using an auction for shift bidding lets employees submit bids for the shifts they prefer. Employee bids can be prioritized based on various criteria including a scoring system of accrued points.

You can create a basic auction by completing a few fields. Multiple options are available for adding features to your auction. Some options are available based on the type of bids allowed in the auction.

Before you begin

- Your scheduler must create a campaign with future unassigned scheduling periods. The campaign must include the organization with the employees that you want to include in the auction.
- Complete the set-up for shift bidding auctions.

  Recommended workflow: Set up shift bidding requests, page 77
- Review the shift bidding auction options

  Shift bidding auction options, page 136

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Settings**.
2. Complete the **General Settings**:
   a. **Auction Name**: Type a descriptive name for your auction.
   b. **Schedule Period**: Click a choice.
   c. **Bidding For**: Click to choose another option.
   d. **Deadline**: Select the auction ending date and time.
   e. Optional: Complete other auction settings to add features to the auction such as **Use Scoring**.
3. Complete the **Employee Display Settings**.
   a. Optional: **Bid Approval Order**: Select to specify the sort order of bids for employees.
4. Click **Save**.

What to do next

View and modify bonus points for schedules , page 144

Related topics

Add a template description, page 142

Schedule Auctions: Settings page, page 138

Recommended workflow: Set up shift bidding requests, page 77

Schedule Auctions: Settings page

Use this page to create, view, or modify Shift Bidding Auction settings.

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td colspan="2">General Setting</td></tr>
<tr><td>Auction Name</td><td>Name of the auction.</td></tr>
<tr><td>Status</td><td>Indicates whether the auction is open or closed. If the status is Closed, employees cannot submit bids for the auction.</td></tr>
<tr><td>Schedule Period</td><td>Campaign and schedule period for the auction.</td></tr>
<tr><td>Bidding For</td><td>Indicates the type of bids accepted in the auction.
Some of the fields on this page change based on which Bidding for option is selected.
Options:
• Full Period Schedules(Default): Schedule templates are fixed for working and non-working days for the entire period. Employees cannot create a custom schedule for the scheduling period.
For the following auction types, additional setup options are available. The auction can be set up for the current scheduling period, and for continuous bidding.
• Combination of Individual Shifts: Schedule templates are for single days. The user can create a custom schedule.
• Multiple Shifts per Day: Schedule templates are for single shifts on a day where a day can include more than one shift. The user can create a custom schedule by selecting multiple shifts for a day and selecting different working times for each day of the schedule period.</td></tr>
<tr><td colspan="2">The Organizations and Employee Type options are available if the Bid For selection is Full Period Schedules. Either the organization, employee type, or both must be specified when setting up concurrent auctions in the same schedule period. The All setting cannot be used for both fields.</td></tr>
</table>

Setting	Description
Organizations	Organizations included in the auction. Can be used to limit which organizations are in the auction. Options: • All (organizations) • Specific organizations from the list Initially, only organizations in the selected Schedule Period are in the list. After an organization is selected, any of its suborganizations that are in the selected Schedule Period are added to the list and included in the auction. If suborganizations are in your list but are not indented under their parent organization, you can update your preferences to show organizations in a hierarchical order. (Go to **My Preferences**. Under **General**, select **User Interface Settings**.)
Employee Type	Employee types included in the auction. Can be used to limit which employee types are in the auction.
Deadline	Date and time when the auction is over.
None Approved Bonus	Bonus points assigned to employees who have placed bids on this auction but did not get any of their requests approved.
Scoring System	**Use Scoring** check box Specifies whether employees can use accumulated points for this auction. When selected, employees can use their points when placing a bid to improve their Bid Rank.
By Organization	**Employees can bid only on their organization schedules** check box. If selected, employees can bid only on their organization schedule.
Paid Hours Per Day	This check box is available if the **Bidding For** selection is **Multiple Shifts per Day.** If this check box is selected and minimum and maximum hours are specified, employees can bid on shift blocks that fall within the paid hours range. Example: If the minimum is set to 4 and the maximum is set to 8, employees can bid on shift blocks that fall within this range. They are not allowed to bid on shift blocks that total 10 paid hours in a day.

Setting	Description
Shift Blocks Per Bid	This check box is available if the **Bidding For** selection is **Multiple Shifts per Day**. If this check box is selected and a maximum number of shift blocks is specified, employees can bid on shift blocks in a bid until they reach the maximum number specified.
Multi-bid Submission	**Requires a minimum number of schedules available** check box plus **Bid Approval Order by Rank** list box. If this check box and a value are selected, the bids by this employee (or for this employee) cannot be submitted until the minimum number of schedules have been selected. This minimum number of schedules is based on either their Bid Approval Order by Rank alone (value=0) or their Bid Approval Order by Rank plus a number (value =1–9). If multi-bid submission is used, employees create their bids on the My Bid Options page instead of the Shift Bid Request form. If a minimum number of schedules is required, employees cannot use bonus points in their bids.
Consecutive Working Days	This check box is available if the **Bidding For** selection is either **Combination of Individual Shifts** or **Multiple Shifts per Day.** If this check box is selected and a maximum number of consecutive working days is specified, employees can bid until they reach the maximum number of consecutive work days specified. The maximum consecutive workdays are exceeded if: • The bid includes a shift on the first day of the org week, and the approved shifts in the week before the bid together with the added days from the bid exceeds the maximum days limit. • The bid includes a shift on the last day of the schedule period, and the number of consecutive days in the week following the bid together with the added days from the bid exceed the maximum days limit. If the maximum number of consecutive work days is exceeded, the bid cannot be saved.
Include Previously Scheduled Employees	This check box is available if the **Bidding For** selection is either **Combination of Individual Shifts** or **Multiple Shifts per Day**. When this check box is selected, employees who already have scheduled shifts can bid in the auction.

Setting	Description
Continuous Bid	This check box is available if the **Include Previously Scheduled Employees** option is selected. When this check box is selected, employees in the auction can continue to bid on available shifts and have multiple bids approved until their bidding deadline has passed. One bid per employee may be approved per group approval action to ensure shift selections are evenly awarded.
Employee Display Settings	
Bid Approval Order	**Display based on** check box and bid approval order list box If this check box and a bid order value are selected, employees can view their ranking in the bid approval order on their **My Bid Options** page. Example: Bid Approval Order: You are 2 of 20 The **Score** option is included when **Use Scoring** is selected. If the **Require a Minimum Number of Schedules Available** check box is selected the bid approval order option is set to Rank and cannot be changed. This check box is on the **Setting** page, under the **General Settings** section. This page is on **Request Management**, under **Schedule Auctions**.

Related topics

Create a shift bidding auction, page 137

Shift bidding auction options, page 136

Scheduling Period Selector window

Use this window to select the schedule period used as the reference schedule.

Field	Description
Campaign	List of campaigns the selected employee or employees are in.
Schedule Period	List of past or present, published one week schedules for the selected campaign.

Related topics

Schedule Auctions: Settings page, page 138

Add a template description

A template description provides information that can help employees identify a shift or schedule they want to bid on. These descriptions are available to anyone creating a bid (employees creating their own bids or by anyone creating a bid for an employee).

When needed, a template description can be changed.

Before you begin

Before you can add a description for a template, the **Description** column must be displayed and the text box for the template must be available.

The template **Description** column is displayed on the **Schedules** page when the optional Bid Options setting **Display template description column** is selected for one or more organizations in the auction. The text box for entering the description is available for a template when this setting has been turned on for the associated organization. This setting is on the **Settings** page, in the Shift Bidding section. This page is located on **Organization Management**, under **Request Management**.

Procedure

1. Go to **Request Management**. Under **Schedule Auction**, select **Schedules**.
2. From the list of auctions on the left, click the name of an auction.

   In the workspace, the bid options for this auction are displayed. Under the **Description** column, a text box is displayed for each template.
3. Type the description for the template.
4. Repeat Step 3 until you are finished.
5. Click **Save**.

   Template descriptions are displayed on the following pages:
   - **My Bid Options**: This page is located on **My Home**, under **My Requests**.
   - **Bid Options**: This page is located on **Request Management** under **Schedule Auctions**.

Related topics

Add a template description, page 142

Troubleshooting: Schedules page - Descriptive column text boxes are unavailable, page 142

Troubleshooting: Schedules page - Descriptive column text boxes are unavailable

The text boxes in the Description column provide a place to enter a description for a shift or schedule. If the **Description** column is displayed and some text boxes are unavailable, it can mean that there are organizations that need to have this option selected.

Procedure

First, if needed, identify the organizations in your auction.

1. Go to **Forecasting and Scheduling**. Under **Campaign**, select **Settings**.
2. In the left pane, click the campaign and scheduling period.
3. In the **Organization** list, scroll until you can view all organizations.

Next, turn on the **Display template description column** for each organization in the auction.

1 Go to **Organization Management**. Under **Request Management**, select **Settings**.
2 In the left pane, click an organization that is in your auction.
3 In the right pane, scroll down to the **Shift Bidding** section.
4 In **Bid Options**, select **Display template description column** if needed.
5 Click **Save**.
   On the **Schedules** page, the **Description** column text box is available for the templates associated with this organization.
6 Repeat Step 2 through Step 5 until all organizations have been checked and updated if needed.

Related topics

Add a template description, page 142

Edit a shift bid auction settings

After an auction is created, you can change most settings. The **Schedule period** and the **Scoring System** settings cannot be changed.

Before you begin

Create a shift bidding auction, page 137

Procedure

1 Go to **Request Management**. Under **Schedule Auctions**, select **Settings**.
2 From the Selection Pane, click an auction.
3 Change the information as needed.
4 Click **Save**.

Related topics

Schedule Auctions: Settings page, page 138

View and modify bonus points for schedules

To encourage employees to bid on unpopular schedules, you can specify bonus points associated with them. These points give the employees a bidding advantage in future auctions.

Before you begin

Create a shift bidding auction, page 137

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Schedules**.
2. Locate a schedule that you want to assign bonus points to.
3. In the **Bonus** box, type the number of points.
4. Repeat Step 2 and Step 3 until you are finished.
5. Click **Save**.

What to do next

Add employees to the auction using one of the options.

Add employees to an auction at the same time, page 148
Add employees to an auction one after another, page 146

Related topics

Recommended workflow: Set up shift bidding requests, page 77

Schedules list page

On the Schedules list page, you can view the schedules associated with a shift bidding auction, assign bonus points to a schedule, update schedules, and view information about the skills needed for a schedule.

Schedules are only displayed if they contain phantom shift assignments.

Column	Description
Template Name	Name of the template. The link provides information about the required skills.
Description	Optional column: Provides additional information about the template. This column is enabled on the Request Management Settings page, under the Shift Bidding section. The system displays this column and any template descriptions that were entered on the **Schedules** page. This page is located on **Request Management**, under **Schedule Auctions**.
Available	Number of available shifts.

Column	Description
Bonus	Bonus points awarded for working this shift/schedule. This box is available even in auctions where Use Scoring is not available. This way, employees can accumulate points for future use.
Hours	Total number of hours in the template.
(*remaining columns*)	Starting with the current day, shows the shift start and end time for each day. What is displayed in each column depends on which of the following auction shift types is used: • A schedule for the full schedule period • A combination of individual, different shifts for the schedule period • Multiple shifts (blocks) per day

Related topics

Add a template description, page 142

Troubleshooting: Schedules page - Descriptive column text boxes are unavailable, page 142

View and modify bonus points for schedules , page 144

Add employees to an auction one after another

To give some employees an advantage in shift bidding, you can automatically add employees to the auction one after another based on a specified order. The employees at the top of the sort order have the opportunity to submit their shift bid before employees lower in the sort order.

Processing overview

1. The employee at the top of the sort order is sent an alert message. It notifies them that they are in the auction and provides their bid deadline.
2. After this employee's shift bid is either approved or the maximum time period to place a bid has expired, the next employee is added to the auction. This employee is sent a message with the same information as the first employee.
3. Unless you stop the serial add, the process continues until all designated employees have been added. The designated employees are based on which **Add** option was selected: **Only Selected and Waiting** or **All Waiting**.

Alternate method to add employees

If you prefer, you can add employees to an auction at the same time.

Before you begin

- Create a shift bidding auction, page 137
- Create an autoprocessing rule for shift bidding requests, page 85

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Employees**.
2. In the left pane, select an auction.
3. Optional: In the lower-left corner of this pane, change the number of employees displayed on a page.
4. Decide how many waiting employees you want to add, and do one of the following:
   - To add individual employees, select one or more employees. If needed, click the right arrow to move to other pages and locate the employees.
   - To add all employees, no action is needed.
5. Click **Add Serially**.
6. Complete the **Add Serially** window.
   a. From the **Add** list, do one of the following:
      - If you are adding individual employees, click **Only Selected and Waiting**.
      - If you are adding all employees, click **All Waiting**.
   b. From the **Order** list, click a sort order.
   c. Type the number of **Time Interval** minutes.

7. Click **Save**.
   - The **Employees page** is displayed and the **Add Serial** button has changed to **Stop Serialized Add**.
   - The serial add begins.
     - When you chose **All Waiting**, the serial add begins for all waiting employees on all pages.
     - When you chose **Only Selected and Waiting,** the serial add begins for employees that meet this criteria on the current page.
8. Optional: To stop adding these employees, click **Stop Serial Add** and click **Yes** to the confirm this action.

   To restart the process, click **Add Serially** again.

Related topics

Employees page, page 149

Add employees to an auction at the same time, page 148

Recommended workflow: Set up shift bidding requests, page 77

Add employees to an auction at the same time

Use this method to add waiting employees to an auction when you want all employees to have equal opportunity to bid on schedules. The employee whose bid is approved first, gets the schedule. Any other bids for the same schedule become an invalid request.

Alternate method to add employees

You can add employees to an auction one after another.

Before you begin

- Create a shift bidding auction, page 137
- Create an auto-processing rule to define criteria for automatic approval of shift bids. Otherwise, bids must be approved manually which is time consuming.

  Create an autoprocessing rule for shift bidding requests, page 85

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Employees**.
2. In the left pane, select an auction.
3. Optional: In the lower-left corner of this pane, change the number of employees displayed on a page.
4. Decide how many waiting employees you want to add, and do one of the following:
   - To add individual employees, select one or more employees. If needed, click the right arrow to move to other pages and locate employees.
   - To add all employees, no action is needed.
5. Click **Add to Auction**.
6. Complete the **Add to Auction** window.
   a. From the **Add** list, do one of the following:
      - If you are adding individual employees, click **Only Selected and Waiting**.
      - If you are adding all employees, click **All Waiting**.

   b. Enter the **Deadline**.
7. Click **Save**.
   - When you chose **All Waiting**, all waiting employees on all pages are added.
   - When you chose **Only Selected and Waiting**, all employees that meet this criteria on the current page are added.

Related topics

Employees page, page 149

Add employees to an auction one after another, page 146

Recommended workflow: Set up shift bidding requests, page 77

Employees page

Use this page to add or remove employees from an auction, submit a shift bid request for an employee, and withdraw an approved shift bid request.

Left pane

This pane lists open auctions.

Right pane

This pane lists all employees in the scheduling period.

Column	Description
Name	Name of the employee.
Status	Indicates one of the following: • **0 Bids**: Employee has been added to the auction, but has not submitted any bids. • **<number> Bids**: Employee is in the auction and has submitted <number> of bids. • **Waiting**: Employee is not in the auction. Either the employee was not added to the auction or the employee was removed from the auction. • **Scheduled**: Employee has an approved shift bid request.
Seniority	Date the employee was hired.
Rank	Employee's rank for this shift bid auction. When employees are added to an auction one after another (Serial Add method), rank is a sort order option. When rank is the sort order, employees with the lowest number have the highest rank and the best chance of getting the shift they bid. In auctions that use scoring, you can see a bid rank in the format of x(x). The first value is the employee's bid rank if the employee does not apply points to the bid. The second value in parentheses is the employee's bid rank if the employee does apply point to the bid. Example: 3(1)
Points	Points accumulated by the employee.
Bonus	The bonus, if any, assigned to the employee for the auction.
Deadline	Date and time the bid must be submitted.

In the lower-left corner, you can see how many employees are on the current page out of the total number of employees in the list. With the up and down arrows, you can change the number of employees displayed on a page. With the left and right arrows, you can page forward and backward.

Related topics

Add employees to an auction at the same time, page 148

Add employees to an auction one after another, page 146

Withdraw an approved shift bid, page 197

Add to Auction window

Use this window to specify which waiting employees are added to a bid auction and the bid deadline. This window varies based on whether you are adding employees at one time or adding employees one after another.

Add to Auction window

Use this window to add employees to an auction at one time.

Field	Description
Add	Specifies whether you want to add only the selected waiting employees or all waiting employees.
Deadline	Bidding deadline. The auction deadline is the default. This date can be changed to an earlier date. The bid expiration timer runs only during the campaign hours of operation.

Add Serially window

Use this window to add employees to an auction one after another.

Field	Description
Add	Specifies whether you want to add only the selected waiting employees or all waiting employees.
Order	Employee sort order for sending shift bid auction alerts or notifications.
Time Interval	Maximum number of minutes the employee has to submit their shift bid before the next employee is added to the auction.

Related topics

Add employees to an auction at the same time, page 148

Add employees to an auction one after another, page 146

Remove an employee from an auction

When you no longer want an employee to submit bid requests in an auction, you can remove them from it. The employee's status changes back to Waiting. If an employee has submitted bid requests, the requests are not affected.

If needed, the employee can be added to the auction again. If the employee had submitted bid requests before being removed, the number is displayed in the Status column again.

Before you begin

Use one of the following methods to add employees to the auction:

- Add employees to an auction one after another, page 146
- Add employees to an auction at the same time, page 148

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Employees**.
2. Select one or more employees.
3. Click **Remove from Auction**.

Related topics

Employees page, page 149

Recommended workflow: Set up shift bidding requests, page 77

Update an auction schedules and employee list

When changes to schedules or employees in the scheduling period occur after an auction is created, you can update the auction.

> For the schedules that were changed, shift bidding requests become invalid and saved preferences are deleted.

Before completing this update, a message provides the number of bids and preferences that will be affected. You can decide whether to continue with the update.

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Schedules**.
2. In the left pane, click an auction.
3. Click **Update Schedules**.
4. Do one of the following:
   - To update, click **OK**.
   - To stop the update, click **Cancel**.

Close a shift bidding auction

When the auction deadline has passed, you can close an auction. Employees cannot submit bids to a closed auction.

When you close an auction, you can assign bonus point to employees who submitted bid requests but none were approved. In a future auction, employees with bonus points have an advantage to get their preference.

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Settings**.
2. From the left pane, click an auction.
3. Click **Close Auction**.
4. Click one of the following buttons:
   - **Close and Assign None Approved Bonus**
   - **Close and without Assigning Approved Bonus**

Related topics

Delete a shift bidding auction, page 154

Recommended workflow: Set up shift bidding requests, page 77

Delete a shift bidding auction

When the auction deadline has passed, you can delete a closed auction. You can use this feature to delete an auction that was not configured correctly.

When a scheduling period begins, the auction is excluded from the list of auctions.

Before you begin

Close a shift bidding auction, page 153

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Settings**.
2. In the left pane, select an auction.
3. Click **Delete**.

Related topics

Recommended workflow: Set up shift bidding requests, page 77

Running a time-off bid

Time-off bidding automates the vacation bidding process. Employees can bid on their time off for a bid period such as annual, semi-annual vacations bids.

Topics

Recommended workflow: Run a time-off bid

You can set up and manage a vacation bid and the bidding by employees.

This workflow describes the procedures for setting up and managing a time-off bid.

Workflow

1. Create a time-off bid, page 157

   You can set up and manage a vacation bid and the bidding by employees.

2. Manage which employees are in a time-off bid, page 160

   Employees must be added to a bid for their time-off request to be processed as a bid request instead of a regular time-off request.

3. Approve all time-off choices without violations, page 192

   You can process all time-off choices in a filter instead of processing them one page at a time. With this method, multiple choices in a request can be approved, and choices in a request can be approved when other choices have violations.

4. Close a time-off bid, page 164

   When you are finished processing the requests for a time-off bid, close the bid to release the employees in it. Employees can be in multiple open bids as long as the bid periods do not overlap.

5. Delete a time-off bid, page 166

   To manage the number of bids listed on the Time Off Bid Summary page, delete bids with a status of Closed. When a bid is deleted, all data associated with the bid is deleted.

Create a time-off bid

In an open time-off bid, employees in an organization and its suborganizations can bid for their vacation preferences.

Before you begin

Set up time-off requests

Recommended workflow: Set up time-off requests, page 19

Procedure

1. Go to **Request Management**. Under **Time Off Bidding**, select **Settings**.
2. Complete the fields in the **General Settings** section.
3. Optional: Complete the fields in the **Validation Setting** section.
4. Click **Save**.

What to do next

Manage which employees are in a time-off bid, page 160

Related topics

Settings page, page 157
Recommended workflow: Run a time-off bid, page 156

Settings page

By default, the Settings page has two panes. The left pane lists the name of existing bids. The right pane is the workspace for creating a bid.

To expand the workspace and hide the other pane, click the handle on the inside of each pane. To return to the default view with two panes, click the handle again.

Example:

When viewing the default Settings page with two panes (left selection pane, right workspace pane), click the handle on the side of the left pane to show the Time Off Bid Summary information and hide the Settings workspace. In the Time Off Bid Summary view, you can see the Name column and six other columns.

To return to the default view with two panes, on the right side, click this handle again.

Settings workspace

Field	Description
General Settings	
Name	Name of the bid.

Field	Description
Status	Status of the bid. When a new bid is created, the status is preset to Open. New requests cannot be submitted to a bid with a closed status.
Organization	Organization and its sub-organizations that can participate in the bid.
Bid Period	Start and end dates that employees can submit requests. After the end date, the system changes the status to Closed. The Bid Period cannot overlap the Request Period.
Request Period	Start and end date of the period in the bid. The Request Period cannot overlap the Bid Period.
Activities Allowed	List of activities that employees can submit requests for in this bid. More than one activity can be in the bid. For an activity to be in this list, it must be set up to be used in requests. Setup is done on the Activity Details page, under Request Management Usage. The Used in Requests check box must be selected.
Validation Settings	
Minimum of <numeric value> <days or weeks> per Choice	Defines the minimum period of a valid time-off request choice.
Maximum of <numeric value> <days or weeks> per Choice	Defines the minimum period of a valid time-off request choice.
Maximum of <numeric value> <days or weeks> to be approved	Maximum period that can be approved for employees in this organization and its suborganizations.
Varies by Employee	When selected, the maximum period that can be approved for each employee in a bid can vary and be imported using a .txt file.

Time Off Bid Summary

Column	Description
Name	Name of the bid.
Status	Status of the bid.
Organization	Organization, including its sub-organizations, that can participate in the bid.
Bid Period	Start and end dates that employees can submit time off requests for this bid.
Request Period	Start and end date of the period in the bid.
Activities Allowed	List of activities that employees can submit requests for in this bid. More than one activity can be in the bid. For an activity to be in this list, it must be set up to be used by requests. Setup is done on the Activity Details page, under Request Management Usage. The Used in Requests check box must be selected.
Employees Bidding	Number of employees who have submitted time off requests for this bid.

Related topics

Create a time-off bid, page 157

Manage which employees are in a time-off bid

Employees must be added to a bid for their time-off request to be processed as a bid request instead of a regular time-off request.

If a bid has a status of open and the bid period is not in the past, you can add or remove employees.

Before you begin

Create a time-off bid, page 157

Procedure

1. Go to **Request Management**. Under **Time Off Bidding**, select **Employees**.
2. Optional: In the upper, right area of the workspace, use the **Employee Filter** to narrow your list of employees.
3. Do one of the following:
   - To add employees, select one or more employees and click **Add to Bid**.
   - To remove employees, select one or more employees and click **Remove from Bid**.

Related topics

Employee Selection page, page 160
Recommended workflow: Run a time-off bid, page 156

Employee Selection page

From this page, import the maximum period that can be approved for each employee, add employees to a bid, and remove employees from a bid.

Column	Description
Name	Name of the employee.
Status	Bid status of the employee. Values: • **Waiting**: Employee has not been added to the bid. • **0 Bids**: Employee has been added to the bid, but has not submitted any requests. • **<1, 2, 3....> Bids**: Employee has been added to the bid and has submitted this number of requests.
Seniority	Employee's start date.
Rank	Employee's rank.
Maximum Period to Approve	Maximum period that can be approved.

Related topics

Manage which employees are in a time-off bid, page 160

Import maximum period to approve for employees

When you do not want all employees to have the same *maximum period to approve* value, import a text file with the specific value you want for each employee (maximum weeks or days). This process can be used to import initial values or update existing values.

This feature is available if the **Varies by Employee** check box is selected on the Settings page (under Validation Settings).

Before you begin

Manage which employees are in a time-off bid, page 160

Create the import file

1 Open a text editor such as Notepad.
2 Enter the following column headers: Last Name, First Name, Maximum Period to Approve
3 Enter the import data using one of the three following delimiters: tab, comma, semicolon.
4 Save the .txt file.

Import the import file

1 Go to **Request Management**. Under **Time Off Bidding**, select **Employees**.
2 In the left pane, select a bid.
3 In the workspace, click **Import Maximum Period Per Employee**.
4 Complete the import parameters:
   a. Change the **Import Units to Days** if needed.
   b. Browse to select the import file.
   c. If needed, change the delimiter to match the delimiter used in the import file.
   d. Type the number of lines to ignore at the beginning of the import file.
   e. For each column in the import file, enter a number to identify its position.
5 Click **Save**.

Related topics

Employee Time Off Maximum Period to Approve dialog box, page 163
Settings page, page 157
Employee Selection page, page 160
Recommended workflow: Run a time-off bid, page 156

Employee Time Off Maximum Period to Approve dialog box

Use this dialog box to specify the parameters for the import file with the maximum time-off period for each employee in the bid.

Column	Description
Import Units	Indicates whether the numbers imported are for weeks or days.
Files to Import	Path of import file.
Delimiter	Character used to specify field boundaries in the import file.
Number of lines to Ignore at Start of File	Lines at the top of the file that are not imported.
Check the fields to import, and enter the column number from your file.	
Last name	Indicates the column position in the import file.
First name	Indicates the column position in the import file.
Maximum Period to Approve	Indicates the column position in the import file.

Related topics

Import maximum period to approve for employees, page 162

Close a time-off bid

When you are finished processing the requests for a time-off bid, close the bid to release the employees in it. Employees can be in multiple open bids as long as the bid periods do not overlap.

Procedure

1 Go to **Request Management**. Under **Time Off Bidding**, select **Settings**.

2 In the selection panel on the left, click a bid name.

> To view more information about the bids before making a selection, click the right arrow to view the full **Time Off Bid Summary** page.

3 From the **Settings** page, click **Close Bid**.

Related topics

Recommended workflow: Run a time-off bid, page 156

Delete a time-off bid, page 166

Reopen a time-off bid

When a bid is closed, you can reopen it for any reason (for example, when a bid was closed by mistake).

Before you begin

Close a time-off bid, page 164

Procedure

1. Go to **Request Management**. Under **Time Off Bidding**, select **Settings**.
2. In the left pane, select a bid name.

> To view more information about the bids before making a selection, click the right arrow to view the full **Time Off Bid Summary** page.

3. From the bid **Settings** page, click **Open Bid**.

Delete a time-off bid

To manage the number of bids listed on the Time Off Bid Summary page, delete bids with a status of Closed. When a bid is deleted, all data associated with the bid is deleted.

Before you begin

Close a time-off bid, page 164

Procedure

1. Go to **Request Management**. Under **Time Off Bidding**, select **Settings**.
2. On the left panel, click a bid name.
3. From the bid **Settings** page, click **Delete**.

Related topics

Recommended workflow: Run a time-off bid, page 156

C h a p t e r 1 1

Managing employee requests

Request Management allows you to manage all types of requests for employees. Requests include time-off, flex time, shift swaps, shift bidding, and shift requests and change. In addition, you can view time-off activity for specific time-off pools or organizations in different calendar formats.

Topics

Manage employee requests

After employees submit requests, you can view and manage the requests. In addition, you can view time-off activity for a specific time-off pool or for a specific organization.

View employee requests

After employees submit requests, you can view them.

To customize the list of requests displayed on the page, you can create one or more filters, and customize the columns on the page. You can drill down into a specific request to view more details.

Manage requests

You can approve, tentatively approve, deny, or withdraw requests.

You can manage requests for specific, individual requests submitted by employees. Alternatively, you can manage requests for a *group* of requests submitted by employees. Instead of managing each request individually, you can work in batch mode for requests.

For example, you can *approve* all requests that do *not* have any violations, or *deny* all requests that *do have* violations.

View time-off activity for time-off pools or organizations

You can view allocated, pending, and scheduled time-off activity on a daily level in a calendar format.

For time-off pools, you can view the number of *hours allocated* to the time-off pool, number of *pending* time-off hours, and number of *scheduled* time-off hours.

For organizations, you can only view the number of pending and scheduled time-off hours. Because multiple time-off pools can belong to the same organization, the values for an organization show the *total* number of pending and scheduled time-off hours for *all time-off pools* in that organization.

You can also view time-off activity within each day in an hourly journal format, in multiples of 15-minute time intervals. For each time interval for a specific time-off pool, you can view the allocated hours, pending, and scheduled time-off hours.

View employee requests

You can view employee requests using various options. Depending on your goal when viewing requests, some options are better than others.

For example, both the All Active view and the No Filter view show only the columns that are common to all request types. If you want to view more information, you can create and use a filter for a single request type. Then columns specific to that request type are displayed in addition to the columns that are common to all request types.

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.

   Until you create your own filters, the default filter, **All Active**, is selected. This filter excludes expired, withdrawn, and invalid requests.

2. To display the employee requests in the best way for your purposes, use one or more of the following viewing options:

   - To view all requests (including expired, withdrawn, and invalid requests), from the View list, click **No Filter**.
   - To view one type of requests, create a filter that only includes that request type and other any criteria as needed.
   - To view only requests submitted by an employee, in the **Find** box, type the last name of the employee, and click **Go**.

     The employee name criteria is applied *on top of* the selected filter.
   - To view requests in a different sort order, click the relevant column to switch between ascending and descending order of that column.

     For example, to view the oldest requests at the top of the list, click the **Submitted** column. The system displays the requests submitted in descending order. To switch back to viewing the newest requests first, click the column again.
   - To view requests submitted during a specific date range, from the **Date Range** field, select the date range.

Related topics

Employee Requests page: All Active view and No Filter view, page 170

Create a filter for viewing requests, page 172

Create a custom view of employee requests, page 171

Process all VTO options requests, page 193

Approve all time-off choices without violations, page 192

Approve all shift bid requests without violations, page 196

Process individual requests, page 188

Employee Requests page: All Active view and No Filter view

Use the Employee Request page to view requests, process requests, and create a request for an employee.

Both the All Active view and the No Filter views show only the columns common to multiple requests type. The All Active view excludes expired, withdrawn, and invalid requests. The All Active view is the default view until you create your own filters.

Column	Description
Name	Name of the employee
Status	Icon showing the status of the request. The name of the status is displayed when you point to the icon. Statuses include: approved, pending approval, tentatively approved, withdrawn, waitlisted, denied, escalated, expired, in negotiation, and invalid.
Type	Column is available to display the type of request when the View is **No Filter** or a filter is used to view either Time Off requests or Shift requests.
Submitted	Date the request was submitted.
Last Modified	Date the request was last changed.
Seniority	Start date of the employee at the organization.
Rank	Rank of the employee in the company.
Expired	Indicates whether the request is expired (**Yes**) or not (**No**).
Comments	Text of any comments added by the manager or employee.
Alerts	Icons showing which request validation rules are violated, as a result of this request. The rule name is displayed when you point to the icon.
Actions	Clickable icons allowing you to change, deny, withdraw, view further details about the request, tentatively approve, or approve the request.

Related topics

Create a filter for viewing requests, page 172

Create a custom view of employee requests

You can create a custom view of the Employee Requests page by adding, removing, and rearranging the columns.

After you are satisfied with your custom setting, you can save and name it for selection later. When needed, you can edit the setting or create another custom setting.

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. On the upper-right area of the page, from the **Customize:** list, click **Edit**.
3. From **Select Configuration to Edit:**
   - To select an existing custom column display setting, click the name of that setting.
   - To create a new custom setting, select **All**.
4. To *remove* specific columns from your display:
   a. From **Selected Properties**, click a column name.
   b. To move the column to **Available Properties**, click the **Assign left** arrows (**<<**).
5. To *add* specific columns back to your display:
   a. From **Available Properties**, click a column name.
   b. To move the column to **Selected Properties**, use the **Assign right** arrows (**>>**).
6. To *rearrange* the column order:
   a. From **Selected Properties**, select a column name.
   b. Click the **Assign up** or **Assign down** arrows until you move the column to the location that you want.
7. Save your column setting:
   - If you are creating a column setting, click **Save As...** and type the name.
   - If you are editing a previously created column setting:
     - To save the edited column setting with its *current* name, click **Save**.
     - To save the edited column setting with a *different* name, click **Save As...** and type the new name.

   From the **Employee Requests** page, the **Customize:** list, you can view all saved column settings.

Related topics

View employee requests, page 169

Employee Requests page: All Active view and No Filter view, page 170

Create a filter for viewing requests

You can create one or more filters to limit the requests listed on the Employee Requests page. For most request types, all filter criteria is optional. Use as few or as many criteria in your filter to meet your needs.

Use a filter when you want to process view a specific type of requests or process a group of requests.

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. From the **View** list, click **Create Filter**.

   The Create Filter window is displayed. By default, the Request Type is **All**.
3. Optional: Under **Organization Name**, select one or more organizations.

   When an organization is selected, its suborganizations are automatically selected.
4. Optional: Select a specific request type.

   On the right, some of the criteria varies based on the selected request type.
5. Optional: For each item you want to filter by, type a value or make a selection from the drop-down menus.
6. Click **Save As**.
7. Type a unique, descriptive name.
8. Click **Save**.

   This filter is available in the View list on the Employee Requests page.

Related topics

Create Filter window, page 172

Create Filter window

Use the Create Filter window to create a filter for employee requests listed on the Employee Requests page.

By default, the Request Type is set to *All*. The filter criteria varies based on the selected request type.

"All" request type filter criteria

The following criteria are available for the *All* request type. In addition, these criteria are part of the criteria available for the other request types.

Criterion	Description
Supervisor	List of available supervisors.

Criterion	Description
Status	List of available statuses for the selected request type. The list is a subset of the following statuses: **Approved**, **Denied**, **Escalated**, **Expired**, **Invalid**, **Pending**, **Tentative**, **Waitlist**, **Withdrawn**, **Withdrawal Requested**, and **Withdrawal Rejected**. **Example**: When the Request Type is Time-Off, the list includes Waitlist but does not include Expired.
Submitted	Date the request was submitted.
Seniority	Start date for employees associated with the request.

Time-off request filter criteria

In addition to the criteria common to all request types, the following criteria is available for time-off requests.

Criterion	Description
Start-End Dates	Time-off period.
Time-Off Bid	When used, requests in other open time-off bids are excluded by the filter.
Number of Choices	Values are either **All** or **First Only**. These values are used to specify whether the selected **Start-End Dates** apply to all or just the first time-off choice.
Time-Off Pool	A drop-down list allowing you to select a time-off pool to filter by.
Time-Off Type	Excludes requests with other time-off types.

Flex Time request filter criteria

In addition to the criteria common to all request types, the following criteria is available for Flex Time requests.

Criterion	Description
Time Off Start-End Dates	Time-off period.
Makeup Start-End Date	Makeup work period.
Makeup Activity	Activity for makeup work period.

Shift swap request filter criteria

In addition to the criteria common to all request types, the following criteria is available for shift swap requests.

Criterion	Description
Start-End Dates	Shift dates.
Type	Shift swap type: One-way or two-way swap.
Skills	Employee skills. (Allows multiple skills to be selected from a list. Use the **Ctrl** key to select more skills, and click the list arrow when your selection is complete.

Shift bidding request filter criteria

In addition to the criteria common to all request types, the following criteria is available for shift bidding requests.

Criterion	Description
Auction Name	Limits the requests in the list to ones in a specific auction. Use this criterion if you have concurrent auctions in the same schedule period and want to view only the shift bid requests in a specific auction.
Start-End Dates	Shift dates.
Preference	Shift preference level.
Day	Day of the week that the shift falls on.
Deadline	Bid deadline (personal or auction deadline).
Rank	Rank of the employee submitting the request.
Points	Points accumulated by the employee.
Bonus	Bonus (if any) assigned to the employee for a particular auction.
Score	Total score of the employee.

Shift Request and Change requests filter criteria

In addition to the criteria common to all request types, the following criteria is available for shift request and change requests.

Criterion	Description
Type	Type of custom shift request to display, for example, New Shift or Shift Change.
Campaign	Name of the campaigns to include in the list.
Shift	Name of the shifts to include in the list. You cannot filter by both Shift and Extension.
Activity	Name of the activities to include in the list.
Extension	Names of the extensions to include in the list. You cannot filter by both Shift and Extension.
Overtime	Include or exclude overtime requests from the list.

Related topics

Create a filter for viewing requests, page 172

Employee Requests page: Time-off request filter view

The Employee Request page has the following columns when a time-off request filter is used.

Column	Description
Name	Name of the employee.
Status	Icon showing the status of the request. The name of the status is displayed when you point to the icon. Statuses include: approved, pending approval, tentatively approved, withdrawn, waitlisted, denied, escalated, expired, in negotiation, and invalid.
Type	Column is available to display the type of request when the View is **No Filter** or a filter is used to view either Time Off requests or Shift requests.
Submitted	Date the request was submitted.
Last Modified	Date the request was last changed.
Start Date	Time stamp of the beginning of the requested time-off.
End Date	Time stamp of the end of the requested time-off.
Length	Duration of the requested time-off.
Hours Accounted	Number of the employee time-off hours involved in the request.
Choice Alerts	Each possible choice for a time-off request is validated independently. For each failed validation, this area shows the icon and description of the validation, similar to that described in the previous section on the alerts information.
Seniority	Start date of the employee.
Rank	Rank of the employee.
Time Off Pool	Time-off pool that employee belongs to.
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the manager or employee.
Alerts	Icons showing which request validation rules are violated as a result of this request. When you point to the icon, the rule name is displayed.

Column	Description
Actions	Icons that you can click to apply an action to the request. To display the icon name, point to it.

Time-off request filter with a status of Waitlist

When time-off requests are filtered with a status of Waitlist, specifc columns display on the **Employee Request** page.

Column	Description
Expiry Date	Waitlist expiration date.
Priority	Priority of waitlist request.
Organization Name	Employee's organization.
Added to Waitlist	Date the request was added to Waitlist.
Days on Waitlist	Number of days the request has been on the Waitlist.
Time on Waitlist	Exact time the request has been on the Waitlist.

Related topics

Create a filter for viewing requests, page 172

Employee Requests page: Flex time request filter view

The Employee Request page has the following columns when a flex time request filter is used.

Column	Description
Name	Name of the employee.
Status	Icon showing the status of the request. The name of the status is displayed when you point to the icon. Statuses include: approved, pending approval, tentatively approved, withdrawn, waitlisted, denied, escalated, expired, in negotiation, and invalid.
Submitted	Date the request was submitted.
Last Modified	Date the request was last changed.
Seniority	Start date of the employee.

Column	Description
Rank	Rank of the employee
Type	Column is available to display the type of request when the View is **No Filter** or a filter is used to view either Time Off requests or Shift requests.
Last Modified	Date the request was last changed.
Time Off Start Date	Time stamp of the beginning of the requested time-off.
Time Off End Date	Time stamp of the end of the requested time-off.
Time Off Length	Duration of the requested time-off.
Hours Accounted	Number of the employee time-off hours in the request. For example: • A flex time request is for three hours • One of the three hours is over lunch Therefore, the time listed in this column is 2.
Time Off Pool	Time-Off Pool to which the employees belong.
Makeup Start Date	Time stamp of the beginning of the makeup time.
Makeup End Date	Time stamp of the end of the makeup time.
Makeup Activity	Activity to be completed during the makeup time.
Expired	Indicates whether the request is expired (**Yes**) or not (**No**).
Comments	Text of any comments added by the manager or employee.
Alerts	Icons showing which request validation rules are violated, as a result of this request. The rule name is displayed when you point to the icon.
Actions	Icons allowing you to change, deny, withdraw, view further details about the request, tentatively approve, or approve the request.

Related topics

Create a filter for viewing requests, page 172

Employee Requests page: Shift swap request filter view

The Employee Request page has the following columns when a shift swap request filter is used.

Column	Description
Name	Name of the employee who submitted the request.
Status	Icon that indicates the status of the request. When you point to the icon, the name of the icon is displayed.
Submitted	Date the request was submitted.
Last Modified	Date the request was last changed.
Seniority	Start date of the employee.
Rank	Rank of the employee.
Shift Date	Date on which the shift offered for swap takes place.
Start	Time (in the viewing time zone) when the shift starts.
End	Time (in the viewing time zone) when the shift ends.
Post Expires	Time by which employees expect the swap to be finalized.
Swap Type	Indicates whether the swap is one-way or two-way. In a one-way swap, one employee takes over the shift of another employee without giving one in return.
Partial Shift	Indicates whether the shift swap being proposed is partial. Shifts can be swapped either entirely or partially. In a *partial* shift swap, the employee: • Can propose swapping only a portion of the shift or • Can propose dividing the shift into multiple portions, each of which can be swapped.
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the manager or employee.
Alerts	Icons showing which request validation rules are violated as a result of this request. When you point to the icon, the rule name is displayed.
Actions	Icons that you can click to apply an action to the request. To display the icon name, point to it.

Related topics

Create a filter for viewing requests, page 172

Employee Requests page: Shift bid request filter view

The Employee Request page has the following columns when a shift bid request filter is used.

Column	Description
Name	Name of the employee who submitted the request.
Bid Name	Name given by the employee to the request.
Status	Icon that indicates the status of the request. When you point to the icon, the name of the icon is displayed.
Submitted	Date the request was submitted.
Last Modified	Date the request was last changed.
Use Points	Indicates whether the employee has chosen to use accumulated bonus points in this bid.
Seniority	Start date of the employee.
Rank	Rank of the employee.
Points	Number of bonus points available to the employee. Bonus points are provided to encourage employees to bid on unpopular schedules
Bonus	Number of bonus points awarded for this shift.
Score	Calculated score of the shift bidding request. The score weights the request against other requests for the same shift.
Preference	Preference level selected by the employee for the specific schedule that is being requested.
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the manager or employee.
Alerts	Icons showing which request validation rules are violated as a result of this request. When you point to the icon, the rule name is displayed.

Column	Description
Actions	Icons that you can click to apply an action to the request. To display the icon name, point to it.

Related topics

Create a filter for viewing requests, page 172

Employees Requests page: Shift request and change filter view

The Employee Request page has the following columns when a shift request & change filter is used.

The values displayed for shift requests and changes only reflect the *difference* from what was originally scheduled.

For example, if only the shift start time changes, *none* of the other columns display a value. You see the change request only, and *not* the original shift settings.

Column	Description
Name	Name of the employee who submitted the request.
Status	Icon that indicates the status of the request. When you point to the icon, the name of the icon is displayed.
Type	Time-off type (activity).
Campaign	Name of the campaign to which the user is assigned during the start of the request.
Submitted	Date the request was submitted.
Last Modified	Date the request was last changed.
Seniority	Start date of the employee.
Rank	Rank of the employee.
Start Date	Start date and time of the request. The date and time includes any overtime before or after the shift. For requests to change an existing shift, only the changes are reflected. For example, a request to extend a shift would only include the extension date and time, not the already scheduled shift.
End Date	End date and time of the request.
Shift	Name of the main shift, if any, being requested.
Activity	Name of the activity of the main shift, if any, being requested.
Overtime	Indicates whether the main shift being requested is overtime (**Yes** or **No**).
Ext Before	Name of the extension before shift, if any, being requested.
Ext Before Activity	Name of the activity for the extension before the shift, if any, being requested.

Column	Description
Ext Before OT	Indicates whether the extension before the shift being requested is overtime.
Ext in Gaps	Indicates whether the extension occurs during a shift gap.
Ext in Gap Activity	Name of the activity for the extension during the shift gap.
Ext After	Name of the extension after shift, if any, being requested.
Ext After Activity	Name of the activity for the extension after the shift, if any, being requested.
Ext After OT	Indicates whether the extension after the shift being requested is overtime (**Yes** or **No**).
Expired	Indicates whether the request is expired.
Comments	Text of any comments added by the manager or employee.
Alerts	Icons showing which request validation rules are violated as a result of this request. When you point to the icon, the rule name is displayed.
Actions	Icons that you can click to apply an action to the request. To display the icon name, point to it.

Related topics

Create a filter for viewing requests, page 172

View details of a request

You can view the details of a request at any time. This information can help you resolve any questions or determine if you want to take some action such as approving or denying the request.

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. Locate the request.
3. Under the **Actions** column, click the **View Detail** icon.
4. When finished, click **Done**.

Related topics

Time-off request details, page 184
Flex time request details, page 185
Shift swap request details, page 185
Shift bid request form, page 186
Shift requests & changes details, page 186

Time-off request details

Use this window to view details of a selected time-off request.

Description

- **Request Summary** section: Displays information such as the Employee Name, Time Off Type, and Time Off Hours.
- **Alerts** section: Displays the icons and a description for any failed validations.
- **Time Off Choice(s)** section: Displays Time Off Choice(s) information associated with the Time Off Request, such as choice ranking, dates, total duration, number of hours debited against time off, and choice alerts.

> Each possible choice for a time off request is validated independently. For each failed validation, this area shows the icon and description of the validation, similar to that described in the previous section on the alerts information.

- **History and status information**: Contains the modification history (audit trail) and status of the request.

Related topics

View details of a request, page 184

Flex time request details

Use this page to view the details for a selected flex time request.

Description

- **Request Summary** section: Displays employee name, time-off type, and any comments added by the employee or manager.
- **Time Off Choices**: Displays Time Off Choice(s) information associated with the request such as start and end dates, length of the request time-off, and the number of time-off hours in the request. .
- **Flex Makeup** section: Displays shift information for the makeup time.
- **Alerts** section: Displays the icons and a description for any failed validations.
- **History and status information**: Contains the modification history (audit trail) and status of the request.

Related topics

View details of a request, page 184

Shift swap request details

Use this window to view details of a selected shift swap request.

Description

- **Request Summary** section: Lists the employees' shifts to be swapped. Shift information includes shift type and date. It also contains information regarding the expiration of the request.
- **Alerts** section: Displays the icons and a description for any failed validations.
- **History and status information**: Contains the modification history (audit trail) and status of the requests.

Related topics

View details of a request, page 184

Shift bid request form

Use this form to view the details of a selected shift bid request or to edit a request.

Section	Description
Shift bid request section	Displays shift bid request information, and can be edited when you are updating a request. The information includes the bid Name, Preference Level (if applicable) and comments associated with the requests.
Auction section	Displays associated shift bid Auction information and is not editable. The information in this container includes Scheduling Period and deadlines.
Biddable schedule information	Displays shift assignment information for one or more selected Biddable Schedules and is not editable.
Alerts section	Displays the icons and a description for any failed validations.
History and status information	Contains the modification history (audit trail) and status of the request.

When an Auction is configured to use Bonus Points, a check box allowing you to specify Use Points is displayed. Keep in mind that using points might affect the rank on the Shift Bid Requests. This information is displayed in the Shift Bid auction section of this form.

Related topics

Bid Options page, page 1

Submit one shift bid at a time, page 1

Submit multiple shift bids at a time, page 1

Shift requests & changes details

Use this window to view details about a selected shift request & change.

Only the parts of the request that are different than the employee's scheduled shift (if any) are displayed.

Description

- **Request Summary** section: Displays the employee's name, type of request, and the request's start and end dates.
- **Shift Information** section: Displays shift's start and end dates, duration, name of the shift, activity, and whether the shift is overtime.

- **Extension Before Shift**: For requests for extension before a shift, shows the type, activity, duration, gap, and whether the extension is overtime.
- **Extension During Gap**: For requests for extension in to a gap, shows the type, activity, duration, and gap.
- **Extension After Shift**: For requests for extension after a shift, shows the type, activity, duration, gap, and whether the extension is overtime.
- **Alerts** section: Displays the icons and a description for any failed validations.
- **History and status information**: Contains the modification history (audit trail) and status of the request.

Process individual requests

When you just need to process a few requests, you can process them individually.

> When you deny a request or reject a withdrawal, you can still view the request on the Employee Request page. You can no longer edit the request or change the status.

Other processing options

- If you want to process a group of requests displayed on the Employee Requests page, you can.
- If you want to process or approve all requests in a filter, the following options are available:
  - Process all VTO options requests
  - Approve all shift bid requests without violations
  - Process all time-off choices without violations

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. For a specific request, click the relevant icon from the **Actions** column:
   - **Approve**: Approves the specific request. The schedule information is updated for forecasting and scheduling purposes. If alerts are configured, they are sent accordingly.
   - **Tentatively Approve**: Displays the status **Pending** to the employees who submitted them. The status is **Tentative** to you until you either confirm the request or publish the schedule.

> Time-off requests that are tentatively approved *do change* the schedule.
>
> If a schedule is published with tentative approvals, the approvals change from *tentative* to *approved*. Shift swap requests stay marked invalid.

   - **Withdraw**: Removes the request from consideration.
   - **Deny**: Removes the request from consideration.

   When you select **Withdraw** or **Deny** for a request, you can add a comment, click **Continue**, and the request status changes accordingly. You can still view the request on the **Employee Requests** page (and view request details). However, you can no longer change the status or details of the request (including selecting **Approve**, **Tentatively Approve**, or **Edit**).

> The denied request is put on a waitlist under the following circumstances:
>
> - **Enable waitlists** is selected
> - You deny a time-off request and another employee withdraws an approved time-off request

   - **Edit**: Allows you to change the details of the request. Once edited, you can add comments about your updates in the **Add Comment** box and click **Save**.

   The schedule information is updated:

   - In the **Employee Roster** (for a manager)
   - On the **Calendar** page

- On the **My Schedule** page (for employees)

3 To view details about a specific request, click the **View Detail** icon.

Related topics

Process a group of requests, page 190
Process all VTO options requests, page 193
Approve all time-off choices without violations, page 192
Approve all shift bid requests without violations, page 196
View details of a request, page 184

Process a group of requests

Instead of processing requests individually, you can save time by processing them as a group (up to 30 requests). Multiple processing options are available.

Only requests displayed on the current Employee Request page are processed. These requests are processed in the order that they are displayed on the page. Processing starts with the request at the top of the page and continues to the next request until all requests on that page are processed.

Other group options

If you want to process or approve *all* requests in a filter, the following options are available:

- Process all VTO options requests
- Approve all shift bid requests without violations
- Process all time-off choices without violations

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. To view only the request type that you want to process, use a filter created for that request type.
3. To increase the number of requests displayed, in the lower-left area of the page, increase the number. (The default is 10 requests per page, and the maximum is 30 requests per page.)
4. To set the processing order, sort by the **Seniority** or **Rank** column.
5. Click **Group Actions**.
6. From **Group Actions**, click one of the following options:
   - **Approve all without Violations**: If there are multiple choices in a request, only one choice per request is approved. If any of the choices has a violation, no choices are approved.
   - **Tentatively Approve all without Violations**
   - **Approve Time Off Choices without Violations**: This choice is available when a time-off filter is used with a time-off bid selected. Multiple choices can be approved in a request (for example, Thanksgiving and Christmas). Choices in a request can be approved when other choices in the request have violations.
   - **Process VTO Options Requests**: This choice is available when using a time-off filter with time-off types (activities) that are set to Display Multiple VTO options are selected. Requests are either approved or denied.
   - **Deny any with Violations**
   - **Confirm all Tentative Approvals**
   - **Remove all Tentative Approvals**
7. To confirm that you want to proceed with processing, click **OK**.

   Requests on the current page start processing. The page is locked until processing completes.
8. If you want to process another page of requests, do the following:
   a. To display the next group of requests. Use the controls in the lower left section of the page.
   b. Repeat Step 5 through Step 7.

Related topics

Process all VTO options requests, page 193
Approve all time-off choices without violations, page 192
Approve all shift bid requests without violations, page 196
Process individual requests, page 188

Approve all time-off choices without violations

You can process *all* time-off choices in a filter instead of processing them one page at a time. With this method, multiple choices in a request can be approved, and choices in a request can be approved when other choices have violations.

Requests on all the Employee Request pages are processed based on the sort order. Processing starts with the request at the top of the first page and continues to the next request until all requests on all pages are processed. The requests are approved or denied based on whether the time-off pool has available hours and the request does not violate the validation rules for this request type.

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. Create a time-off filter with a status of Pending.
3. From the **View** list, select your filter.
4. Sort requests in your preferred order (for example, Seniority or Rank).
5. Click **Approve All Time Off Choices without Violations**.
6. To confirm that you want to process all requests in the filter, click **OK**.

   During processing, the status is displayed above the Employee Request list and on the **Approve All Time Off Choices without Violations** button.

Related topics

Create a filter for viewing requests, page 172

Process all VTO options requests

You can process *all* VTO options in a filter instead of processing one page at a time. When VTO options requests are processed, they are approved or denied based on whether the time-off pool has available hours and the request does not violate the validation rules for this request type.

With this method, requests on all the Employee Request pages are processed. Requests are processed based on the sort order. Processing starts with the request at the top of the first page and continues to the next request until all requests on all pages are processed.

VTO requests cannot be manually approved or denied.

Procedure

1 Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.

2 Create a time-off filter that includes time-off types (activities) that have the Display Multiple VTO Options set.

> If you select any time-off types that do not have the Display Multiple VTO Options setting turned on, the Group Action button, Process VTO Options Requests, will not be available later in this procedure.

3 From the **View** list, select your filter.

4 Sort requests in your preferred order.

5 Click **Process All VTO Options Requests**.

6 To confirm that you want to process all requests in the filter, click **OK**.

During processing, the status is displayed above the Employee Request list and on the Process All VTO Options Request button.

When processing is complete, you either receive a message stating how many requests were approved or a message stating there are no requests available to approve.

Related topics

Create a filter for viewing requests, page 172

VTO multi-option requests processing overview

When processing a request with multiple options selected, the options are processed in the same order as they are listed on the Create New Request form. If the first selection fails validation, then the next selection is validated. This process continues until either one selection is approved or all selections are denied.

Any request that fails validation on submission will not be processed.

Full Day option

The entire shift must pass validation rules to be approved.

Partial Day option

From the request start time and for the entire duration, this request must pass the validation rules to be approved.

Late Start option

Validation starts with the beginning of the shift and continues forward to the end of the shift. Time-off will be approved for a duration until the validation fails for the entire shift.

For all the following examples, the shift is from 8 A.M. to 5 P.M.

- Example 1: The time-off pool does not have hours available at 10 A.M. The request is approved for 8 A.M. to 10 A.M.
- Example 2: There are no validation failures for the entire shift. The request is approved for 8 A.M. to 5 P.M.
- Example 3: There are no calendar events to avoid in the shift, and there are hours in the time-off pool. However, the employee has a balance of only two hours above the required minimum hours in a pay period. The request is approved for 8 A.M. to 10 A.M., the first two hours of the shift.

Early Leave option

Validation starts with the end of the shift and continues backward to the beginning of the shift. Time-off will be approved for a duration until the validation fails for the entire shift.

For all the following examples, the shift is from 8 A.M. to 5 P.M.

- Example 1: A calendar event, such as a meeting, occurs from 2 P.M. to 3 P.M. Meeting is selected in the validation rule Schedule calendar events activities to avoid. The request is approved for 3 P.M. to 5 P.M.
- Example 2: There are no validation failures for the entire shift. The request is approved for the full shift, 8 A.M. to 5 P.M.
- Example 3: There are no calendar events to avoid in the shift, and there are hours in the time-off pool. However, the employee has a balance of only two hours above the required minimum hours in a pay period. The request is approved for 3 P.M. to 5 P.M., the last two hours of the shift.

Anytime option

Validation is for any time during the shift that can be approved. This option could result in the entire shift being approved or multiple periods during the shift being approved.

For all the following examples, the shift is from 8 A.M. to 5 P.M.

- Example 1: There are no validation failures for the entire shift. The request is approved for 8 A.M. to 5 P.M.
- Example 2: There are no hours in the time-off pool from 8 A.M. to 12 P.M., and there is a calendar event to avoid. The request is approved for 12 P.M. to 2 P.M.
- Example 3: There are no hours available in the time-off pool from 9 A.M. to 12 P.M, and there is a scheduled calendar event to avoid from 2 P.M. to 5 P.M. The request is approved for 8 A.M. to 9 A.M. and 12 P.M. to 2 P.M.
- Example 4: There are no calendar events to avoid in the shift, and there are hours in the time-off pool. However, the employee has a balance of only two hours above the required minimum hours in a pay period. The request is approved for 8 A.M. to 10 A.M., the first two hours of the shift.

Related topics

Process all VTO options requests, page 193

Approve all shift bid requests without violations

You can automatically process and approve all shift bid requests. During processing, the first request without a violation is approved. Only one shift bid can be approved for an employee.

Requests on all Employee Request pages are processed. Requests are processed based on the sort order. Processing starts with the request at the top of the first page and continues to the next request until all requests on all pages are processed.

If needed, shift bid requests can be manually approved or denied.

Before you begin

Create a shift bidding auction, page 137

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. Use a filter for shift bidding with a status of pending.
3. To set the processing order, sort by one of the following columns:
   - **Rank**
   - **Seniority**
4. Click **Approve All Shift Bid Requests without Violations**.
5. To confirm that you want to process all requests in the filter, click **OK**.

   During processing, the status is displayed above the Employee Request list and on the Approve All Shift Bid Requests without Violations button.

   After processing is complete, you will either receive a message stating how many requests were approved or a message stating there are no requests available to approve.

Related topics

Create a filter for viewing requests, page 172

Withdraw an approved shift bid

When needed to resolve a problem, you can withdraw an approved shift bid for an employee. Then, the employee can submit more shift bid requests.

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Employees**.
2. Select an employee with an approved shift bid request.
3. Click **Withdraw Approved**.

   The Status is changed to **0 bids**.

View the time-off calendar

View the time-off calendar to view time-off activity for either an organization or a time-off pool. Separate calendar views are available for daily allocation hours and interval allocation hours.

Daily Allocations view (default)

Use this view to display the calendar for daily time-off activities (such as vacation or personal days). A set number of hours are available for the 24-hour day for employee time-off.

Interval Allocations view

Use this view to display the calendar for interval time-off activities (such as voluntary time-off). A set number of hours are available for segments of time during the 24-hour day. The available hours vary by the time of day. The segments can be for as little as 15 minutes.

Before you begin

Decide if you want to view the time-off calendar for an organization or a time-off pool.

- When you view the time-off calendar for an organization, you can view the hours pending and hours scheduled. Multiple time-off pools can belong to the same organization. The values for an organization show the *total* number of pending and scheduled time-off hours for *all time-off pools* in that organization.
- When you view the time-off calendar for a time-off pool, you can view the hours allocated, hours pending, and hours scheduled.

Procedure

1. Go to **Request Management**. Under **Time Off Calendar**, select **Time Off Calendar**.
2. If you want to view the time-off calendar for an organization, do the following:
   a. From the left pane, click an organization.
   b. Click **View Organization**.
3. If you want to view the time-off calendar for a time-off pool, do the following:
   a. From the left pane, click an organization.
   b. From the **Time-Off Pools** list, click a time-off pool.
   c. Click **View**.

   The daily allocations view of the time-off calendar is displayed. By default, the system displays the time-off activity for the current and next month.
4. Optional: To view time-off activity for period, change the Time-Off Calendar month and year box as needed.

Interval Allocations view

You can switch to the time-off calendar for interval time-off activity.

5. To view the interval allocations time-off calendar, in the **View** box, click **Interval Allocations.**

   The interval allocations view of the calendar is displayed. If **na,0,0** is listed for each day, it means that an interval allocations time-off pool has not been created.

6 When needed to view full interval information, do one of the following:
- To view information in a tooltip, move the pointer over the interval.
- To view the information in a larger pop-up window, click in the interval box.

7 Optional: To view pending requests for time-off hours on the Employee Requests page, click the Pending Hours value (a link).

8 Optional: To view a list of employees with scheduled time-off, click the Scheduled Time Off value (a link).

Related topics

Time-Off Pool list page, page 199

Time-Off Calendar page, page 199

Time-Off Pool list page

Use this page to select a time-off pool for viewing the associated time-off calendar. The time-off calendar shows time-off activity in a graphical format.

Column	Description
Time Off Pool	Name of the time-off pool
Description	Optional: Description of time-off pool.
Owner Organization	Name of the organization that created the time-off pool.

Related topics

View the time-off calendar, page 198

Time-Off Calendar page

The Time Off Calendar page displays time-off activity for an organization or a time-off pool.

Field	Description
Above the Time-Off calendar workspace:	
(*month and year list*)	When changed, the calendar refreshes the information.

Field	Description
View	List includes the following options: • **Daily Allocations** (default): Time-off allocation hours are for an entire day. • **Interval Allocations**: Time-off allocation hours are for periods smaller than a day. By default, each day is populated with a 24-hour interval with zero hour allocated for time-off. Interval allocations can be as short as 15 minutes.
Calendar workspace	
(*calendar*)	Based on the selected View allocation type, a monthly calendar is displayed showing time-off activity for either the selected organization or time-off pool. • **Daily Allocations** (default): Calendar is in the traditional table format with a box for each day in the month. • **Interval Allocations**: Calendar is a non-traditional table format. The first column lists each day of the month. The remaining columns show each of the 24 hours in a day. When an interval time-off period has been configured for a time-off pool, it is listed in the row for that date and under the appropriate time column for the period start and end time. Three values, separated by commas, are shown in the following sequence: 1 Hours Allocated (available for a time-off pool) 2 Hours Pending 3 Schedule Time Off

Related topics

View the time-off calendar, page 198

View time-off summary information

You can view a year of time-off summary information for one or more employees. Information is available for each time-off type.

Some options vary depending on whether you selected one employee or multiple employees.

Procedure

1. Go to **Tracking**. Under **Roster**, select **Time Summary**.
2. To select employees, do one of the following:
   - To view information for one employee, in the left pane, click the employees name.
   - To view information for multiple employees, in the left pane, select the employees and click **View**.

Viewing options for one employee

- To view information for a different year, in the **Time-off Summary (Hours) for Year** list, choose another year from the list of years for this employee.

Viewing options for multiple employees

- To view information for a different year, use the date selector (upper-right area of page) to choose the starting date for another year.
- To change which of the selected employees are shown, on the lower-left area of the page, use the Viewing **Person** options.
  - To move through the information for each of the selected employees, use the next and previous arrows.
  - To change the number of selected employees that you view, use the up and down arrows.
- To hide the information for an employee, click the arrow on the left of their name. To show the information again, click the arrow again.

Related topics

Time Summary page, page 201

Time Summary page

This page shows the time summary data for each of the selected employees.

- If only a single employee is selected, a year selector appears in the page title area. This selector lists the years for the selected employee. When the yearly selection changes, the page is updated with the time summary information for that year.
- If multiple employees are selected, a date selector is shown at the upper right of the page. After you have selected a date, the page is updated so that, for each employee, the calendar year that includes the selected day is shown in the work pane.
- If Time Off Accrual is enabled for any of the selected employees' organizations, the summary table also includes the time-off accrual-related columns. Also, in the employee container title area, there is a link to Time Off Accrual Calculator, to display the number of accrued hours at a specified date.

Time Off Summary (Hours) for year <*selected year*> as of <date> section

For each employee selected, the workspace displays the information for a year.

If Time Off Accrual is enabled for any of the selected employees' organizations, the summary table also includes the time-off accrual-related columns. Also, in the employee container title area, there is a link to Time Off Accrual Calculator, to display the number of accrued hours at a specified date.

Column	Description
Time Off Type	Either the Time Off type or Activity type depending on the settings. If Time Off Accrual is configured at the Activity Type level, the activity type is shown with all the underlying activities indented below it.
Total	Total available hours at the end of the year. These hours are calculated based on the carry over from the previous year plus the accrued hours of the current year.
Starting Balance	Accrued hours at the start of the current year. This value is based on the last available balance from the previous year.
Used	Total hours used by the current date.
Scheduled	Hours scheduled by the *as of* date.
Pending	Hours pending by the *as of* date.
Estimated Remaining	Total scheduled hours from now until the end of the selected year.

Required Hours (balance) for Pay Period section

For each selected employee and the selected pay period, this section shows the following information when appropriate:

Column	Description
Current Hours	Number of hours worked in the current pay period.
Minimum Required Hours	Number of minimum required hours in a pay period.
Balance	Number of hours needed to meet the Minimum Required Hours for the Pay Period. (The Minimum Required Hours minus the Current Hours.)

It is available when the track required pay period hours feature is used by the selected employees organization.

This setting is on the **Settings** page, under the **Required Pay Period Hours** section. This page is located on **Organization Management**, under **Request Management**

Flex Time Summary section

For each of the selected employees, this section shows the following information when appropriate:

Column	Description
Request Approved	Number of approved flex time requests.
Limit	Maximum number of flex time requests.
Remaining this <quarter or month>	Number of flex time requests that can be submitted in the specified time period.

It is available when the following flex time validation rule is selected for the employee's organization:

Maximum number of <*number*> Flex Time Request per <Month or Quarter>.

This rule is set on the **Validation** page, under the **Flex Time Request** section. This page is located on **Organization Management**, under **Request Management**.

One Way Shift Swaps section

For each of the selected employees, this section shows the following information when appropriate:

Column	Description
Request Approved	Number of approved one-way shift swap requests.
Limit	Maximum number of one-way shift swap requests that can be approved.
Balance	Number of one-way shift swap requests that can be approved in the specified time period.

It is available when the following Shift Swap Request Validation rule is selected for the employee's organization:

Maximum number of <*number*> one-way shift swap requests per <Month or Quarter>.

This rule is set on the **Validation** page under the **Shift Swap Request Validation rules** section. This page is located on **Organization Management**, under **Request Management**.

Time Bank section

Column	Description
Time Bank Name	Name of the time bank.

Column	Description
Target Hours	Total number of hours that are required to work for the entire Time Bank period.
Target Hours (up to <date>)	The pro-rated number of hours that your are required to work in the period from the beginning of the Time Bank to the *up to* date which is the end of the last fully-published period that intersect the time-bank period. If the schedule period ends after the time bank, the time bank end date is used as the *up to* date. The *up to* date is shown in parentheses after the column heading.
Scheduled Hours (up to <date>)	Number of hours scheduled in the period from the beginning of the time bank to the *up to* date.
Adjustments	Any schedule adjustments made between the time bank's start date and the *up to* date.
Balance	Number of Scheduled hours at the *up to* date plus any Adjustments minus the Target Hours at the *up to* date.

Bottom of workspace

- When information spans more than one page, there is a pagination control to move between pages.
- A **Refresh** button is available to refresh the information displayed.

Related topics

View time-off summary information, page 201

Purge requests

For database cleanup and maintenance, purge requests regularly. The system does not automatically purge requests.

Procedure

1. Go to **Organization Management**. Under **Request Management**, select **Purging**.
2. In the left pane, click an organization.
3. In the right pane, do the following:
   a. Click the request type and organization.
   b. Click a purge option.
   c. Click **Delete Requests**.

Related topics

Purging page, page 205

Purging page

Use this page to delete requests from the database.

Field	Description
Requests of __ type	Type of requests to purge. Choices include: • *All* requests types (default) • A specific request type
created from __ (*organization*)	Identifies the organization that requests are purged from. Options include: • Current Organization (default) • Organization Branch (the organization and all suborganizations
purge options	One of the four purge options to determine whether requests are purged based on a date. Options include: • All requests of this type (These requests are deleted regardless of the create date or start date.) • Request created more than __ days in the past • Requests created during <selected date range> • Requests starting during <selected date range>

Related topics

Purge requests, page 205

Submitting requests for employees

When employees cannot submit a request, you can submit one for them.

Shift swaps requests are the only exception. Only employees can submit these requests or post on the swap board.

Topics

Create a time-off request for an employee

When employees cannot submit their own time-off requests, you can create the requests for them.

Multiple time-off choices can be entered, but only one choice can be approved. Choices are processed from top to bottom, so they need to be ranked by preference.

Voluntary Time Off options

Some time-off types (activities) for VTO provide five Advanced VTO options on the request form. If the employee is flexible and you select multiple VTO options, the request is more likely to be approved.

When multiple VTO options are selected, the options are processed in the same order as they are listed on the request form. Each selected option is processed until one option is approved or all selected options are denied.

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. Click **Create New Request**.
3. From the pop-up window, click **Create New Request**.
4. From the **Create New Request** pop up, select **Time-Off**.
5. Under the **Request Summary** section, do the following:
   a. Select an employee.
   b. Select the time-off type.
   c. If the time-off type has multiple VTO options, select any or all the options.
   d. Select how you want the time-off to affect the regularly scheduled hours.
   e. Optional: Add a comment.
6. Under the **Time-Off Choices** section, do the following:
   a. To specify a date and time range for your time-off choice, use the date selector.
   b. Optional: To add another time-off choice, click **Add**.
   c. To ensure that multiple choices are sorted in order of preference, click a choice and use the **Move Up** or **Move Down** button (top-most preferred choice, bottom-least preferred).
7. Optional: To help you make your time-off choices you can view the time-off calendar for two, consecutive months. The following options are available.
   - To change the months, use the month and year lists.
   - To view the time-off calendar legend, click **Legend**.
8. Click **Save**.

   The request appears on the **Employee Requests** page. You can manage it like any other request (such as selecting to approve or deny it).

Related topics

[Time Off request form](), page 209
[Process individual requests](), page 188
[Process a group of requests](), page 190
[Process all VTO options requests](), page 193

Approve all time-off choices without violations, page 192
Approve all shift bid requests without violations, page 196

Time Off request form

Use the time off request form to create a request for a time off activity.

Field	Description
Request Summary	
Employee Name	Indicates the name of the employee.
Time Off Type	Specifies the type of time off request. Values include activities that the administrator has configured as time that can be requested off. Examples include: • Floating Holiday • Personal Day • Sick • Unavailable • Vacation • Voluntary Time Off
Advanced VTO Options	When the selected time off type has multiple Voluntary Time Off choices, the following options are available. • **Full Day**: Requests VTO for your entire shift. • **Partial Day**: Requests VTO for a specific start time and length of time. • **Late Start**: Requests VTO by starting your shift as late as possible. • **Early Off**: Requests VTO by ending your shift as early as possible. • **Anytime Off**: Requests VTO at anytime during your shift.
Time Off Hours	Specifies how you want the time off request to affect the regularly scheduled hours. For all the Time Off types except **Unavailable**, the possible choices are: • **Use my time off hours to schedule my absence**: Indicates to use the allocated time off hours and work fewer hours than the full schedule for that week. • **Schedule around my time off request if possible**: Indicates to schedule the employee as needed, except for the time requested off. This option is *only* useful: - When the employee has flexibility in their work rules - Time off is being requested *before* the schedule is run For **Unavailable**, the choice is: • **Mark as unavailable and schedule around this time**: Indicates to schedule the employee for the full number of work hours, working around the time marked as unavailable.

Field	Description
Add Comment	Allows you to add comments about the time off request.
Add to Waitlist if not Approvable	If time off waitlists are used, this check box is available. (Your organization can choose to make this option selected by default.) If your request is not approved, this option indicates whether to waitlist the request.
Expiry Date	If time off waitlists are used, this check box is available. Optional: Specifies until what date the request is valid. You can type any date (after the current date) here. If you do *not* type a date, the system updates the expiry date to the request start date. Requests are marked invalid once they are past the request start date.
Time Off Choices	
(*start date and end date of time off*)	Calendar icon for selecting the date range of the time off request. By default, the current day is selected.
Length	Displays the length of the time off request in days or hours as appropriate.
Hours Accounted	Displays the number of the time off hours in the request based on the scheduled shift.
Time Off Calendar	
Time Off Calendar	Time off information for four, consecutive months is available. This information is intended to help you make the correct choices for time off dates. (You *cannot* select a time off period by clicking dates in the Time Off Calendar container.) The months shown can be changed through the month and year list box menus in the header of the container. The Time Off Calendar color legend can be toggled by clicking **Legend** in the header of the container.

Example: Schedule around my time off request if possible

- You work an 8-hour schedule but the start time is flexible.
- You submit a time off request from 4:00-6:00 PM for an appointment.
- Due to the flexible start time, the scheduling engine comes up with schedule for you to work from 7:00-4:00. This schedule allows you to have your full eight hours without using up any of the times off.

In other words, the time off hours appear on the calendar. However, the hours do not get used from your allocation because there is no scheduled shift under it.

Example: Use my time off hours to schedule my absence

- You work an 8-hour schedule but the start time is flexible.
- You submit a time off request from 4:00-6:00 PM for an appointment.
- The scheduling engine attempts to schedule your shift from 9:00-6:00 (or something else that overlaps the time off). Your regular work hours are reduced and the time off is used out of your allocation.

Related topics

Create a time off request, page 1

Create a flex time request for an employee

When an employee cannot create their own request, you can create a flex time request to take off during an approved shift and specify a corresponding shift extension to make up the time taken.

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. Click **Create New Request**.
3. From the **Create New Request** pop-up window, select **Flex Time**.
4. In the **Request Summary** section, select the **Employee Name** of the employee for whom you are requesting flex time.
5. Select the **Time Off Type** (activity) from the drop-down list.
6. In the **Time Off Choice** section, click the calendar icon to specify the date range for the flex time.
7. In the **Flex Makeup** section, click the **Select Date** icon and select the month, day and time for the makeup time.

   If the employee has a shift scheduled, by default, the **Duration** field contains 0.15 and the **Hours Accounted** contains 00:15 at the end of the current shift.
8. Determine how the employee is going to make up flex time:
   - If the employee is going to make up Flex Time *before* a shift, proceed to Step 9.
   - If the employee is going to make up Flex Time *after* a shift, proceed to Step 10.
   - If the employee is going to make up Flex Time in a gap, proceed to Step 11.
9. If the employee is going to make up Flex Time *before* a shift:
   a. From the **Extension** list, select **Extension Before Shift**.
   b. From the **Activity** list under the **Extension Before Shift** section, make a selection.
   c. Select the **Duration** of the time that will be spent making up the time taken off before the scheduled shift.
   d. In the **Makeup Gap** field, select the desired gap (space) between the makeup and the shift start time.
10. If the employee is going to make up Flex Time *after* a shift:
   a. From the **Extension** list, select **Extension After Shift**.
   b. From the **Activity** list under the **Extension After Shift** section, make a seelction.
   c. Select the **Duration** of the time that will be made up after the scheduled shift.
   d. In the **Makeup Gap** field, select the desired gap (space) between the shift end time and the start of the makeup time.
11. If the employee is going to make up Flex Time in a gap:
   a. From the **Extension** list, select **In Gap <start time> <end time>**.

      All available gaps that occur during the selected shift appear. You can only select one gap for each Flex Time Request.
   b. From the **Activity** list, select the activity.
   c. Select the **Duration** of the time that will be made up.

d. In the **Makeup Gap** field, select the desired gap (space) between the start of the shift gap and the start of the makeup time.

   For example, the scheduled shift has a Gap from 2:00 to 4:00 with a Makeup Gap of 1 hour. The employee is making up 30 minutes. Therefore, the Makeup Shift starts at 3:00.

12 Select **Add** to define another Flex Makeup event if some of the time to be made up takes place on multiple days, in a different extension, or in different gaps on the same day. For each Flex Makeup event, you must specify a date and enter the applicable **Extension Before Shift**, **Extension After Shift**, or **In Gap** information.

13 If you need to check the accrual of **Time Off**, select **Calculate Estimate** before saving the request.

14 Select **Save**.

Any alerts that indicate messages relating to the request display in the lower, left area of the page.

> Before saving the request, ensure that the **Hours Accounted** in the **Time Off Choice** section equals that **Hours Accounted** in the **Flex Makeup** section. Otherwise, you will receive an error when you try to save the request, as the **Hours Accounted** must be equal in both sections of the request.

15 When all changes have been completed, click **Done**.

Related topics

Flex time request form, page 213

Flex time request form

Use the flex time request form to create a request to take time off during an approved shift, and specify a corresponding shift extension to make up the time taken.

Field	Description
Request Summary	
Employee Name	Name of the employee. *This field is available when someone is creating the request for an employee.*
Time Off Type	Indicates the time off type (activity) for this request.
Add Comment	Text of any comments added by the manager or employee.
Time Off Choice	
(*start date*)	Calendar icon is available for selecting the start date and time of the time off.

Field	Description
(*end date*)	Calendar icon is available for selecting the end date and time of the time off.
Length	Displays the duration of the requested time off.
Hours Accounted	Displays the number of the employee time off hours in the request. For example: • A flex time request is for three hours • One of the three hours is over lunch Therefore, the time listed in this column is 02:00.
Time off Calendar	
(*month and year selectors*)	Changes the starting month of the time off calendar. By default, the current month and year are selected.
Legend button	Shows the legend for the time off calendar.
(*calendar*)	Shows the calendar for the selected starting month and year.
Flex Makeup	
(*date selector*)	Date of the makeup time.
Shift information	
Name	Shift name.
Start	Time the shift starts.
Activity	Activity for the shift.
Duration	Total length of the shift.
Flex Makeup information	
Extension	Indicates when the makeup time will occur.
Activity	Indicates the activity during the makeup time.
Duration	Indicates the duration of the makeup time.
Makeup Gap	Indicates the desired gap between the start of the shift gap and the start of the makeup time.

Field	Description
Hours Accounted:	The hours in this section must match the Hours Accounted in the Time Off Choice section.
Alerts	
Alerts	When applicable, alerts are displayed.
Description	Description of the alert.

Related topics

Create a flex time request, page 1

Create a shift request or a change request for an employee

When an employee cannot create their own request, you can create either a new shift request or a change request for an existing shift.

You can create and submit the following types of shift requests:

- New shift request
- Overtime (OT) request (regular shift marked as OT).
- New shift request with an extension at the end or start of a shift.
- Updated shift request for an existing shift - shorten or extend the length of the shift by:
  - Selecting a different shift
  - Adding extensions before or after the shift
  - Changing the shift type or shift start time

Procedure

1. Go to **Request Management**. Under **Employee Requests**, select **Employee Requests**.
2. Click **Create New Request**, and **Shift Request & Change**.
3. Click **Create New Request**.
4. From the **Create New Request** dialog box, select **Shift Request & Change**.
5. Complete the fields on the **Create New Request** form.
6. Click **Save**.

   The request appears on the **Employee Requests** page. You can manage it like any other request (such as selecting to approve or deny it).

Related topics

Shift Request & Change form, page 217

Process individual requests, page 188

Process a group of requests, page 190

Shift Request & Change form

Use this form to create a request a new shift or to change an existing shift.

Shift section

Setting	Description
Employee Name	Only available when someone is creating a request for an employee.
Start Date	Indicates the start day of the shift. After a day is selected, the system can determine whether the request type is: • **New Shift** (if there is not already a shift on that day) • **Shift Change** (if there is already a shift on that day) Whenever you change the day, the rest of the page is reloaded with the details for that day.
Start Time	Indicates the start time of the shift. By default, this option can be used to either set or change the start time of the shift. Shift changes only: If the **Start Time** box is unavailable, it means that your system administrator has chosen to prevent changes to the start time on existing shifts.
Shift	Lists the available shifts for selection using your available work patterns, and the shift already assigned to you on that day (if any).
Duration	Numeric read-only box. This option is pre-populated with the duration from the work pattern of the selected shift.
End Date	Read-only date/time display calculated dynamically using the start date, start time, and duration.

Setting	Description
Activity	List of activities available to be requested. For a New Shift request: • When the dialog is opened from the Net Staffing ribbon on the schedule page, it only lists activities that have a Net Staffing shortage. • The default selection is the activity linked to the queue with the greatest shortage. However, when coming from the Requests page, there is no Net Staffing context, so you can request any activities at any time. In addition to listing the available activities, the list also includes the activity that the employee is already scheduled for on that day (if any). You cannot change the activity for a Shift Change request.
Mark Entire Shift as Overtime	Marks the entire shift as overtime (OT). When checked, the **Extension Before Shift** and **Extension After Shift** sections are *not* available, and you are not able to request an extension to the shift.
Add Comment	Allows you to add comments about the shift request.

Extension Before Shift section

Field	Description
Type	Specifies the type of shift request.
Activity	Specifies the activity for the extension.
Duration	Numeric read-only box. This option is pre-populated with the duration from the work pattern of the selected shift.
Gap	Specifies the length of time between the shift and the extension.
Overtime	Indicates whether this request is overtime.

Extension After Shift section

Field	Description
Type	Specifies the type of shift request.

Field	Description
Activity	Specifies the activity for the extension.
Duration	Duration of the extension.
Gap	Desired gap (space) between the requested shift extension and shift start time.
Overtime	Indicates whether this request is overtime.

Extension During Gap section

Field	Description
Gap	Available gaps which are based on gaps in the shift scheduled for the day.
Type	Overtime extensions which are based on your available work patterns.
Activity	Available activities which are based on the activities in the shift and activities for the OT template selected in the Type field.
Duration	Duration of the extension.
Extension Gap	Desired gap (space) between the start of the original shift gap selected for the extension and the start of the extension.

Alerts section

Field	Description
Alerts	Alerts configured for this request.
Description	Details of the alerts.

Related topics

Request additional shifts and shift changes, page 1

Submit one shift bid request at a time for an employee

When employees cannot submit their own shift bid requests, you can create the requests for them. Otherwise, these employees are not scheduled for the auction scheduling period.

Before you begin

You should understand the different types of shift bids.

Auction shift bid types, page 224

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Bid Options**.
2. In the left pane, click a shift bid auction.
3. Select an employee.
    a. To display the list of auction employees, on the right of the Employee box, click the arrows. (This box in located above the bid options area and on the right.)
    b. Click an employee.

    By default, the bid options for all employee types are displayed.

    If an optional setting was enabled on the **Settings** page (located on **Request Management**, under **Schedule Auctions**), only the bid options for the selected employee's type are displayed.
4. Optional: Change your view.
    - Use a filter to limit the bid options in the list.
    - Point to a column heading to change the sort order. Options include:
        - A non-date column heading sorts the list in ascending or descending order.
        - A date column heading displays a menu that provides multiple options for sorting.
5. Make your selection by clicking a template row in a non-link area. (Links are underlined.) Based on the type of auction, do one of the following:
    - If the auction is for full schedule bids for the schedule period, select *one schedule*.
    - If the auction is for a combination of individual shifts for the schedule period, select only *one shift for each day*. To select multiple shifts for the schedule period, select a shift and hold the CTRL key to select additional shifts.
    - If the auction is for multiple shifts per day, select *one or more shifts for each day*. To select multiple shifts, select a shift and hold the CTRL key to select additional shifts. Shift start and end times cannot overlap.
6. Click **Create**.

    The Shift Bid Request: Create New Request form is displayed.
7. Complete the form.
    a. Type a bid name.
    b. Change the preference number if needed.
    c. Optional: Type comments.
    d. Optional: Other fields, such as **Use Points**, may be available based on how the auction is set up.

8. When finished, click **Save**.
9. Review your bid and make changes if needed.
   a. Optional: Change the name.
   b. Optional: Change the comments.
10. When there are no changes, click **Done**.
    - The **Bid Options** page and the **My Bid Options** page are updated with the preferences saved for the submitted bid.

      After a bid is submitted, the preference number can be changed, saved, and resubmitted when the bid status is Pending or Escalated. (The status can be viewed on the Employee Requests page).
    - On the employee's **My Requests** page: Each shift bid submitted from the Create New Request form page is listed in your preference order and with the name that you entered.
    - On the employees's **My Notifications** page: A notification for each submitted shift bid is listed on this page when the bid submission alert is set up.

Related topics

Auction shift bid types, page 224

Bid Options page , page 224

Submit multiple shift bid requests for an employee

When employees cannot submit their own shift bid requests, you can create the requests for them. Otherwise, these employees are not scheduled for the auction scheduling period.

When an auction is set up to require a minimum number of available schedules in a bid request, you must bid on enough schedules to meet or exceed this requirement.

> When you set a preference for a template, a message above the bid options list indicates the total number of available schedules in your current submission.

Before you begin

Be familiar with the different types of shift bids.

Auction shift bid types, page 224

Procedure

1. Go to **Request Management**. Under **Schedule Auctions**, select **Bid Options**.
2. In the left pane, click a shift bid auction.
3. Select an employee.
   a. To display the list of auction employees, on the right of the Employee box, click the arrows. (This box in located above the bid options area and on the right.)
   b. Click an employee.

      By default, the bid options for all employee types are displayed.

      If an optional setting was enabled on the **Settings** page (located on **Request Management**, under **Schedule Auctions**), only the bid options for the selected employee's type are displayed.
4. Optional: Change your view.
   - Use a filter to limit the bid options in the list.
   - Point to a column heading to change the sort order. Options include:
     - A non-date column heading sorts the list in ascending or descending order.
     - A date column heading displays a menu that provides multiple options for sorting.
5. To see if a message is displayed that indicates your bid submission must contain a minimum number of available schedules, check the top of the workspace.

   Example: Kim Smith's bid submissions must contain at least 40 available schedules.
6. Do one of the following based on whether your auction requires a minimum number of available schedules in your bid submission and your preference for making bid submissions:
   - If you are required to have a minimum number of schedules in your bid submission, create your bids on the Bid Options page. Continue to Step 7.
   - If you are not required to have a minimum number of available schedules in your bid submission, you have two options:
     - Create one or more bids on the **Bid Options** page. Continue to Step 7.
     - Create one bid at a time using the **Shift Bid Request** form if you prefer that method.

7 Make your selection by clicking a template row in a non-link area. (Links are underlined.) Based on the type of auction, do one of the following:
   - If the auction is for full schedule bids for the schedule period, select *one schedule*.
   - If the auction is for a combination of individual shifts for the schedule period, select only *one shift for each day*. To select multiple shifts for the schedule period, select a shift and hold the CTRL key to select additional shifts.
   - If the auction is for multiple shifts per day, select *one or more shifts for each day*. To select multiple shifts, select a shift and hold the CTRL key to select additional shifts. Shift start and end times cannot overlap.

8 In the **Preference** box, select a bid by entering a number to indicate your preference for that schedule or shift (1 = first choice, 2 = second choice).

> If you need to finish your bid submission later and want to save the preferences that you have entered, click **Save Preference**.

9 Repeat Step 7 and Step 8 until you have selected all your bids with the correct preference number.
   You have the following options:
   - Select only the bids needed to meet your minimum number of available schedules.
   - Select enough bids to exceed your minimum number of available schedules.
   - Select any number of bids when no minimum number of available schedules is required.

10 Click **Submit Multiple Bids**.

11 When prompted to confirm the number of bids, click **OK**.
   Results after the bids are processed:
   - The **Bid Options** page and the **My Bid Options** page are updated with the preferences saved for the submitted bid.
     After a bid is submitted, the preference number can be changed, saved, and resubmitted when the bid status is Pending or Escalated. (The status can be viewed on the Employee Requests page).
   - On the employee's **My Requests** page: Each shift bid submitted from the Create New Request form page is listed in your preference order and with the name that you entered.
   - On the employees's **My Notifications** page: A notification for each submitted shift bid is listed on this page when the bid submission alert is set up.
   - If you were required to submit bids to meet a minimum number of available schedules for this employee:
     - For future bids in this auction, you can create a single bid at a time using the **Shift Bid Request** form.
     - If you withdraw a shift bid request and fall below the employee's required minimum number of available schedules, you need to meet the employee's minimum number of available schedules.

Related topics

Auction shift bid types, page 224

Bid Options page , page 224

Submit one shift bid request at a time for an employee, page 220

Auction shift bid types

A shift bid auction lets you submit bids for the shifts that you prefer to work. In an auction, you bid on one shift type.

- A full schedule period auction

  Schedule templates are fixed for working and non-working days for the entire period. You cannot create a custom schedule for the scheduling period.
- A combination of individual shifts auction.

  Schedule templates are for single days. You can create a custom schedule for the period by selecting working days. Only one shift per day can be requested.
- A multiple shifts per day auction

  Schedule templates are for singles shifts on a day where a day can contain more than one shift. You can create a custom schedule by selecting multiple shifts for a day and different working times for each day of the period. You can also add extra work time to an existing shift.

  - If there are changes that have not been published in your schedule for the scheduling period, bids cannot be saved, approved, or denied. Schedule changes must be published or reverted to a previously published schedule before bids can be processed.
  - Only one activity is allowed per shift on a specified day. You can only bid on the shift blocks that match the activity of an existing shift if your bid adds one or more blocks to an existing shift, or you can select multiple blocks of the same activity to create a new shift for the day. Bidding on a shift blocks with different shift activities results in an error. There is no limitation on the activities that belong to shift events that make up a shift.
  - If you have overtime for a specific day, you cannot add shift blocks to that day's schedule.

Bid Options page

Use this page to view shifts or schedules available in a shift bidding auction or to create shift bid requests for employees.

On the left, the Auction Name pane lists the auctions that you can select. The Bid Options list changes to show what is available for the selected auction.

Features below the menu and above the bid options

Feature	Description
(*minimum number of bids message*)	If an auction is set up with Multi-bid Submission, the system displays a message about the minimum number of available schedules that must be in bids submitted for the selected employee. Message text: <employee first and last name>'s bid submissions must contain at least <number> available schedules. When this message is displayed, you cannot submit a bid request for an employee until you have met the required number of minimum available shifts.
(*current submission message*)	If an auction is set up with Multi-bid Submission, the system displays a message that indicates the number of available schedules in the current submission. Message text: Current submissions contain <number> available schedules. This number is the total from the Available column for all templates that have a preference set. It increases and decreases when a preference is added or removed.
filter and sort setting list box	Lists the available filter and sort settings.
Filter button	Displays the Edit Filter: Shift Bids window.
Employee	List of employees in the auction.

Bid Options list column descriptions

Column	Description
Template Name	Name of the template.
Description	The system can display this column and any template descriptions that were entered on the Schedules page. This page is located on Request Management, under Schedule Auctions. Provides additional information about the template.
Preference	Use to create a shift bid request. When a preference is entered, the schedule is selected for a bid. One indicates the highest ranked schedule, two indicates the second highest ranked schedule, and so on. When more than one bid has the same preference number, the bids have equal preference. After a bid is submitted and the status is Pending or Escalated, the preference number can be changed, saved, and resubmitted. (The status can be viewed on the Employee Requests page and the My Requests page.)

Column	Description
Status	Indicates the status of the preference for that shift bid. • **Pending**: Bid preference has been submitted. • **Saved**: Bid preference has been saved, but not submitted. • **Edited, Saved**: Bid preference was previously submitted, but has been changed and saved. The new bid preference has not yet been submitted. • **Denied**: The bid preference was submitted and denied. The preference cannot be changed. (The status can be viewed on the Employee Requests page and the My Requests page.) • (**No status shown**): A status in not available when the bid preference has been entered, but has not been saved. The preference can be changed.
Available	Number of instances of the template that have not yet been bid on. When an auction is set up with Multi-bid Submission, this number is added to the current submissions total message displayed above the bid options list.
Submitted	Number of bids submitted.
Bonus	Bonus points awarded for working this shift/schedule.
Hours	Total number of hours in the template.
(*remaining columns*)	Starting with the current day, shows the shift start and ending times for each day.

Related topics

Submit one shift bid request at a time for an employee, page 220

Submit multiple shift bid requests for an employee, page 222

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