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Genesys Engage cloud Workforce Management 8.5.1 Guide

The Supervisor's Window

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Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to [Workforce Management in Genesys Engage cloud](#).

The panes in WFM Web for Supervisors display some combination of the controls described below, depending upon selections that you make in Object pane. For more information, see the [table](#) below.

Generic buttons	The following buttons appear at the top right of every WFM Web window:
	Home displays the Home view, which is a list of all View menu options that is organized by tab.
	Refresh applies to the current view.
About button	About displays information about copyright and the current version information.
Logout button	Logout closes WFM Web, without confirming your choice if there are no changes to save.
	New Page displays a new web page of WFM Web. Default view is Home.
Help button	General Help displays WFM Web help at the Overview topic.
	Contextual Help displays WFM help at the current topic.
	Search field enables you to enter search criteria to quickly find the object you are looking for. For example, depending on which pane you have open, you can enter the name of a Rotating Pattern , Contract , Shift , Skill , or Agent .
	Paging controls enable you to browse the previous and next pages or navigate to the first and last items in the data set (start and end of the list), by clicking the appropriate arrow button in the view. To navigate between pages, you can use the Up , Down , Page Up , and Page Down keys on the keyboard.
Modules	Click to open each WFM module: Configuration , Policies , Calendar , Forecast , Schedule , Trading , Performance , Adherence , and

	Reports.
Breadcrumb navigation	WFM for Supervisors uses the same type of "breadcrumb navigation" as you see in Windows 7 directories and across the top of some web browser windows. Click on any link in this display to choose from a drop-down menu and make a selection within that branch of the currently selected module. For example, the following breadcrumb navigation path will display a specific schedule scenario for the currently selected date:  Home >  Schedule > Scenarios > Q4-2010 > Q4-2010 Intra-day
Edit Menu (Copy, Cut, Paste, Find)	Each of these commands becomes enabled when it can be performed on the currently selected object.
Actions Menu	Select from a list of view-specific commands. This menu's contents change as you move among modules and views, and they match the command icons that appear on the toolbar.)
Actions Toolbar	These buttons correspond to the commands on the Actions menu. Hover your mouse pointer over a toolbar button to see a tool tip that displays the button's name.
Objects Pane	This pane offers several different display schemes, depending on the current selection of tab and menu item: Tabs: module-specific item trees under separate tabs One tree: Business Units (BUs) > Sites One tree: BUs > Sites> Activities Upper tree: BUs > Sites> Teams > Agents Lower tree: BUs > Multi-site Activities > Activity Groups > Sites > Activities Important When there are two selecting items in either of these two trees, it triggers an automatic selection of corresponding items in the other tree. At the site level, you may see a team in the tree labeled <None>. This node lists any agents that are assigned to the site, but not assigned to a team. If all agents in that site are assigned to a team, then the <None> team is empty. The only exceptions to this hierarchy are when Scenarios is selected or when you use the Configuration or Reports modules. Clicking an object in a tree (or clicking its expand/collapse control) displays the object's contents below it, indented slightly. When you have displayed the desired object, double-click it (or click it once, and then click Get data) to open the selected view for that object. Where the Objects tree displays check boxes, you can usually select / deselect multiple objects by selecting ☒ / clearing (☐) their check boxes, respectively. Certain views do not display check boxes; in this case, you can select multiple objects by clicking the group of objects while pressing the SHIFT or CTRL key. Some views and windows allow you to select only a single

	object.
Expand/Collapse Controls	Wherever you see the ▸ icon in a tree or other control, you can click it to see an expanded view of the adjacent item's contents or details. The ▴ icon indicates an expanded item. Click it once to collapse the item's contents and see more parallel items.
Working Pane (or Data Pane)	The right pane of the window displays data and controls that correspond to your selected module and view. Some views display graphs with an explanatory legend below them.
Action Buttons	View-level action buttons within the working pane provide controls that are specific to particular views (for example, apply or cancel). The Get data button, when present at the lower left below the Objects tree, refreshes the display with current data from the database. Tip Not all modules use the Get data button. If there is no Get data button, the view is automatically updated with the new data every time that you change your date or object selection.
Status Bar	The status bar, at the very bottom of the window, displays messages about WFM Web's current state. (In some views, it displays the most recently generated warning or error message.)

Retrieving Lists of Items in Segments

The list of items or objects (such as **Agents**, **Shifts**, **Profiles**, **Activities**, **Schedule States**, **Contracts**, and **Rotating Patterns**) in a pane is displayed in segments or sequential pages. When large amounts of data are being retrieved, the list of items in the pane is displayed in smaller segments sequentially, with 50 items per page. This limits the number of items that are retrieved from WFM at any given time, maintaining optimal performance during retrieval. See [Paging controls](#).

Changing the Font Size in the Browser

There are two ways to change the font size in the browser:

1. On the keyboard, hold the down the **Ctrl** button and scroll up to make the font larger or down to make it smaller.
Use this method to change the font size of the breadcrumbs and modules in WFM Web for Supervisors, such as **Rotating Patterns**, **Contracts**, **Organization**, **Schedule State Groups**, **Shifts**, and **Activities**.

2. Select **About > Settings** and use the **Text Size** slide bar to adjust the text.
Use this method to change the font size of the all modules, except the new modules (see the list above).

Customizing Table Views

Many WFM Web views include on-screen tables. You can typically customize the display of these tables in one or both of the following ways:

Resize Columns	In the table's header row, place your mouse pointer over the separator between two column headers. When you see a two-headed arrow, click and drag the column separator to adjust the column widths.
Sort by Column	In some tables, you can sort the data according to one of the displayed columns. Specify the column by clicking its header. You can change the sort order by clicking the header again. An upward-pointing arrowhead in the header indicates ascending order. A downward-pointing arrowhead indicates descending order.

If the **Agent** column is specified as the sort key, in ascending order, it will read: **Agent ^**