Workforce Management Administrator's Guide

User Security

5/8/2025

User Security

The Workforce Management (WFM) Configuration Utility User Security module enables you to fine-tune the precise access each user has to WFM objects and functions. For example, you can:

- Limit certain users so that they can view only certain sites or teams.
- Limit certain users so that they can read the schedule but not change it.
- Limit access to reports.
- Limit access to WFM configuration settings modules, such as Contracts and Time Off Types.

Pending Schedule Changes

User Security enables you to control who can make changes to schedule scenarios and to the Master Schedule. Users might be able to enter changes to the Master Schedule, but unable to commit or approve changes. Such changes are in pending status. An authorized user can then review the changes, and either commit/approve them or roll back/delete the changes.

This enables contact center managers to provide Master Schedule access to certain users who might not ordinarily have access. For example, supervisors who manage teams of agents, but who don't normally have any scheduling responsibility, can enter team meetings or other exceptions into the schedule. Workforce-scheduling professionals can then review these to ensure that coverage is not adversely affected.