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Workforce Management Administrator's Guide

User security

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User security

The Workforce Management (WFM) Web for Supervisors' user security views **Roles** and **Users** in the **Configuration** module, enable you to fine-tune the precise access each user has to WFM modules, 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 Rules**.

Securing 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. These 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.

Importing Genesys Administrator objects into WFM

Workforce Management has its own security/access rights system, but also implements tenant security for the objects that are shared with Genesys Administrator. (See **Roles**.)

You define Switch, Person (agents and supervisors), Skills, and Time Zone objects in Genesys Administrator, which are then saved in the Configuration Database.

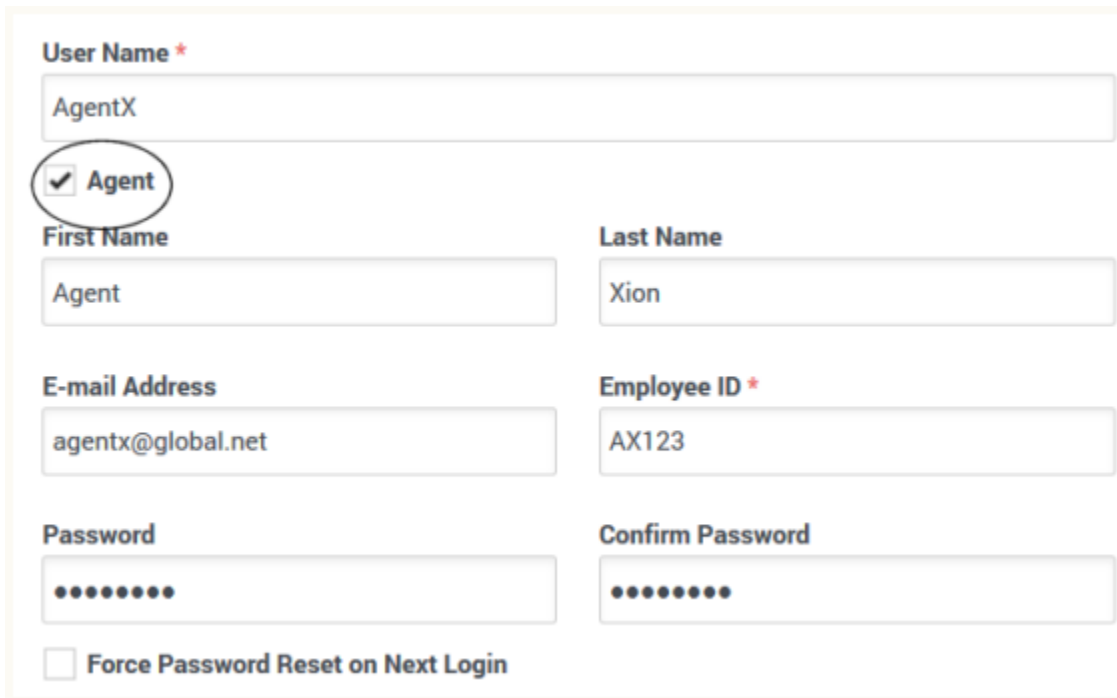
When you click a Person (agent) object in Genesys Administrator the **Properties** dialog box opens enabling you to select various parameter for this object, including the Skill set that you want to associate with the agent.

Important

WFM synchronization automatically brings Person objects and assigned Skill information in the Configuration Database into the WFM Database.

Agent field in Genesys Administrator

When importing users into WFM, users (non-agents) available for selection have the **Agent** check box cleared in the Genesys Administrator **Properties** dialog box, as shown in the example below.



The screenshot shows the 'Properties' dialog box for a user in Genesys Administrator. The 'User Name' field contains 'AgentX'. Below it, the 'Agent' checkbox is checked and circled in red. The 'First Name' field contains 'Agent' and the 'Last Name' field contains 'Xion'. The 'E-mail Address' field contains 'agentx@global.net' and the 'Employee ID' field contains 'AX123'. There are two password fields, 'Password' and 'Confirm Password', both containing masked characters. At the bottom, there is an unchecked checkbox labeled 'Force Password Reset on Next Login'.

Figure: Agent Check Box

Genesys Administrator security

The security setup in Genesys Administrator also applies to WFM. For example, a user who is logged in to Web for Supervisors, but does not have permission to view certain objects/users in the Genesys Administrator, will not be able to view those objects/users in Web for Supervisors.

A user's ability to see, interact with, and synchronize agents and skills in WFM matches that user's tenant-based access permissions in the Genesys Administrator. In other words, in order to access an agent or a skill in WFM, you must also be able to access them in Genesys Administrator.

Important

In Genesys Administrator, you can restrict access (using security permissions) to objects, including Person objects. If you do not see a particular user in WFM under the Genesys Administrator heading, check that **Person** object's Genesys Administrator security settings.

This access permission is tenant-based. If you are working in a multi-tenant environment, this behavior affects every display of agents or skills in WFM. Tenants exist only in a multi-tenant

environment.

About the WFM database

You create or update the WFM Database schema using the WFM Backup-Restore Utility. You configure the WFM Database using WFM Web for Supervisors. For more information about the WFM Backup-Restore Utility, see [Managing the WFM Database](#).