



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

# Workforce Management Web for Supervisors Help

Getting Started

---

## Contents

- [1 Getting Started](#)
  - [1.1 Screen Resolution and Multiple Browser Windows](#)
  - [1.2 Security Features](#)
  - [1.3 Accessibility](#)
  - [1.4 Setting the Clock](#)
  - [1.5 Links to Further Information](#)

# Getting Started

## Tip

WFM has a new interface for the Forecast module. If you are using the new Supervisors interface and have landed on this page by accident, see the "Getting started" page in the *Workforce Management Supervisor Help*, which describes the new **Forecast module**.

Site supervisors can use a web browser to log in to Workforce Management Web for Supervisors (WFM Web) and perform the following tasks:

- View, add, edit, and delete agent preferences and exceptions.
- Set time-off limits.
- Forecast staffing requirements, based on service objectives and historical data.
- Schedule agents and teams for multiple activities, and make real-time schedule changes.
- Create a bidding scenario with profile agents, which real agents can use to bid on their favorite schedules.
- View, and approve or decline, agents' proposed schedule trades.
- Configure **Schedule State Groups** and **Organization** objects, such as **Business Units** and **Sites**.
- Configure **Activities** properties.
- Configure policies for **Exception Types**, **Time-Off Types**, **Time-Off Rules**, **Meetings**, **Marked Time**, **Shifts**, **Contracts**, and **Rotating Patterns**.
- Monitor real-time site performance.
- Review agents' real-time adherence to their scheduled status.
- Generate reports that show schedule and performance information.
- Configure email notifications.

## Screen Resolution and Multiple Browser Windows

- WFM Web is optimized for a screen resolution of at least 1024 x 768. At lower resolutions, some elements (such as table headers) might not display correctly.
- If you are using Mozilla Firefox, Genesys recommends that you not run WFM Web in more than one browser window on the same workstation, because doing so can cause the application to behave in unexpected ways.
- If you are using Internet Explorer, Genesys recommends (for the same reason) that you not open a second browser window on the same WFM Web session by selecting **File > New** or pressing **Ctrl+N**.

However, starting a separate WFM Web session by launching a separate Internet Explorer browser thread does not appear to cause this problem.

## Security Features

WFM Web includes security features that prevent unauthorized access to information:

- You can view and make changes only to those modules (such as **Calendar** or **Schedule**) and objects (such as sites) for which you have security access. You cannot access other modules or objects.
- Configuration and security options enable you to restrict access to agents' personal information, such as wages.
- Agents use a separate application (WFM Web for Agents), which enables them to view and change their own information. They have limited access to other agents' schedule information, but only if schedule trading is enabled at your site. Agents can also access this application on their Android, smartphone, or other mobile device if the supervisor provides the URL.

## Accessibility

To run Web for Supervisors with accessibility tools like JAWS, set the **ACCESSIBILITY\_COMPATIBLE** Web Application setting to true in the **About > Settings..** dialog. Otherwise, WFM Web for Supervisors could freeze, or display adverse or unexpected behavior while screen readers like JAWS are being used.

## Setting the Clock

WFM Web for Supervisors picks up the regional settings from the local computer. You may wish to change this if, for example, WFM Web appears in a 12-hour format and you want to view a 24-hour format.

### Tip

WFM Web for Agents picks up the regional setting from the server where the WFM Web application is running—not from the agent's computer.

## Links to Further Information

<a href="#">Log In</a>	Explains how to start your WFM Web session.
<a href="#">The Supervisors Window</a>	Explains the layout and functions of the WFM Web controls.

Policies	Explains how to configure the following policies: <a href="#">Exception Types</a> , <a href="#">Meetings</a> , <a href="#">Time-Off Types</a> , <a href="#">Time-Off Rules</a> , <a href="#">Marked Time</a> , <a href="#">Shifts</a> , <a href="#">Contracts</a> , and <a href="#">Rotating Patterns</a> .
Configuration	Explains how to configure <a href="#">Shared Transport</a> , <a href="#">Agents</a> , <a href="#">Organization</a> objects, such as Business Units, Sites, and <a href="#">Time Zones</a> , <a href="#">Schedule State Groups</a> and <a href="#">Activities</a> . <a href="#">Notifications</a> explains how to configure email notifications. <a href="#">Colors</a> explains how to configure the colors that WFM uses in the Supervisor schedule views.
Calendar	Explains how to view, add, edit, and delete preplanned items, such as exceptions and preferences; how to grant or decline these items; and how to set time-off limits.
Forecast	Explains how to forecast staffing requirements based on projected interaction volumes and service objectives.
Schedule	Explains how to build, view, share, edit, and delete published and unpublished schedule scenarios.
Schedule Bidding	Explains the schedule bidding process, including: creating a scenario, bidding, bid resolution and publishing to the Master Schedule.
Trading	Explains how to view, and approve or decline, agents' desired schedule trades.
Performance	Explains how to view actual contact center performance compared with planned performance based on key indicators such as Service Level, Average Speed of Answer (ASA), and Abandonment.
Adherence	Explains how to view agents' real-time adherence to their schedules in both tabular and graph formats.
Reports	Explains how to generate, view, print, and export predefined WFM reports.
Log Off	Explains how to end your WFM Web session.