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Workforce Management Agent Help

Using common settings and controls

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- Agent

Use common settings and controls to complete similar tasks in multiple views.

Related documentation:

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Changing the date

When you open the WFM Agent application, your schedule displays the current week, by default. (To change the default setting, see the **On Startup** section of My Settings.)

If you want to display a different week in your schedule, change the date, by using the date arrow buttons **Previous**  and **Next**  or the pop-up calendar button . See the figure below.



Figure: Date and Calendar buttons

Similar buttons appear in other WFM Web views. In some views, they move you by different time intervals, as discussed below.

To use the date arrows:

- Click  to move backward.
 - In the **Schedule**, **Trading**, and **Preferences** views, you reach the previous week.
 - In the **Time Off** view, you reach the previous year.
- Click  to move forward.
 - In the **Schedule**, **Trading**, and **Preferences** views, you reach the next week.
 - In the **Time Off** view, you reach the next year.

To use the pop-up calendar:

1. Click the **Calendar** button .

A calendar appears.

2. Set new dates:
 1. Click a day to select the week containing that day.
 2. Click the month drop-down list to jump to a different month.
 3. Click  or  on either side of the year to jump forward or back one year.
3. Click **OK**.
The window automatically refreshes to match your date selection.

Changing the settings in a view

You can change the settings in all of the views in the Schedule, Trading, Preferences, and Time Off modules (except the **Preferences > Availability Patterns** view).

- Click **Settings**  in the upper-right corner of the view to add additional columns or change the data that is displayed.
The settings are different for each view.

Using the page navigation controls

When any of the WFM Agent views has more than one page of data, use the navigation buttons **First**

, **Previous** , **Next** , and **Last**  to move between the pages. These

buttons are grouped with a numeric indicator of your position within the pages:   1 of 1

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Using the keyboard to sort columns

You can use the number keys on your keyboard to sort columns in any views that have tables with sortable columns.

To sort columns using the keyboard controls:

1. Place your cursor inside a table.
2. Press the number key on your keyboard that corresponds to the column number, when counting left to right.
For example, if the column is the third one from the left, press "3". The key acts as a toggle,

sorting the column in ascending or descending order.

Viewing graphics in this Help

If you are viewing this Help online, click any graphic to enlarge it. Click the "X" in the top-right corner to close the enlarged graphic window.