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Workforce Management Agent Help

[Getting started](#)

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Become familiar with WFM Web for Agents and some of its basic features.

Related documentation:

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Use this Help to find all of the information you will need to understand the features in the Workforce Management (WFM) Agent Application and how it functions.

You can use the Workforce Management (WFM) Agent UI to:

- View your schedule.
- Bid on schedules in bidding scenarios.
- Bid on overtime hours in overtime offers
- Indicate your schedule preferences.
- See how much time off you have of each time-off type.
- Request time off.
- View other agents' schedules (if enabled at your site).
- Trade your schedule days with other agents (if enabled at your site).
- View and change your personal settings.

Taking a tour of the WFM Agent UI


[Link to video](#)

Watch the video for a preview of the features and controls in the WFM Agent UI.

Note that some features might not be enabled in your contact center.

Opening the Agent Help



Open context-sensitive help topics, by clicking the **Help** icon  at the top right of the WFM window (similar to the one beside your name). A help topic opens in a separate window, describing the window that you currently have open.

In open dialog boxes, click the **Help** button.

Inside help topics, underlined words and phrases are links to other topics. Click any link to go directly to the related topic. To return to a previous topic, click your browser's **Back** button or press **Backspace**.

Security features

Whether you can view other agents' schedules or other agents can view yours, depends on how your system administrator has set up WFM Web. Regardless of the set up, other agents can never set preferences or make vacation requests for you, nor vice versa.

To ensure system security, WFM Web displays the timestamp information from the previous login in the GUI the next time you log in through the agent desktop or agent mobile interface, alerting you of any unauthorized use of your login credentials.

Keyboard navigation and audio

If you do not have a mouse to click commands, you can press the **Tab** key to move the "focus" to the command that you want to execute, and then press the **Enter** key or the **Space bar**.

Accessing WFM on your mobile device

You can use your mobile device to access your schedules, plan your time off, and perform many other tasks.

To access the WFM Agent UI on your mobile devices, open your browser (Safari on iOS devices or Google Chrome on Android devices) and enter the same URL that you use to access the Agent UI on your desktop. WFM Agent Mobile Client supports only the latest supported version of Safari and Google Chrome.

The browser screen's *actual* resolution on mobile devices must be at least 320 x 550 pixels. WFM supports nothing less than either dimension.

Tip

Accessing WFM on mobile devices is not supported in all contact centers, by default. Ask your supervisor about support and if there are any additional security requirements specific to your contact center.

Here's what you can do using the Agent Mobile Client on your mobile device:

- In the **My Schedule** screen and dialogs:
 - See scheduled and pending items with the same color configuration as in the desktop UI
 - Create trade proposals
 - Add or rollback Exceptions
- In the **Trading** screens and dialogs:
 - See and filter a list of trades
 - Respond and add comments to trade requests

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- In the **Preferences** screens and dialogs:
 - Add, edit, and delete Preferences (shift, availability, day off)
 - In the **Time Off** screens and dialogs:
 - Add, recall, delete, or cancel Time-Off requests
 - In the **Configuration > My Settings** screens and dialogs:
 - Change your personal settings

Printing this Help

Use this procedure if you are reading the Help online. If you are opening Help from within the WFM interface, you will not see the option **Download a PDF** mentioned in this procedure. In that case, use the **Print** function in your application to print the file.

Tip

If you are unsure of which print application is being used in your contact center, ask your supervisor.

To print the Help, complete the following steps:

1. In the top-right corner of the page, click **Download a PDF** and choose **PDF this manual** or **PDF this page**.
2. When the dialog opens, select one of two options:
 - Click **Open with** to select the application, with which you want to view and print the Help.
If you choose this option, you can save it after opening in the application you specify. Adobe Acrobat v9 is recommended.
 - Click **Save File** to save the Help to a folder on your computer.
3. If you choose to save it, when the download is complete, navigate to the folder in which you saved the .pdf file. Then use the **Print** function in your application to print the file, or open and view the file on your computer offline.