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Workforce Management Web for Supervisors (Classic) Help

[Roles](#)

Contents

- 1 Creating roles
 - 1.1 Using copy to create roles
- 2 Editing roles
- 3 Deleting roles
- 4 Assigning and removing role assignments
 - 4.1 Assigning roles to users
 - 4.2 Removing role assignments
- 5 Deleting users from the Assigned Users list



- Supervisor

Create and assign user security roles to control general access privileges and permissions.

Related documentation:

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Security *Roles* control general permissions (or privileges), as well as access permissions to various modules in WFM Web for Supervisors. Roles do not control access to business units, sites, or teams. To add or restrict access to these specific objects, see Access rights.

In the **Roles** module, you can:

- Import users
- Define a default security role
- Assign security roles to users. Users automatically take on the privileges or permissions configured for the security role to which they are assigned.

Tip

Security roles enable you to set permissions for access to modules but not to business units, sites, or teams. To enable the rights to add or restrict access to these specific objects, you must check the Access Backend Configuration check box in the Role Privileges pane.

In the **Roles** view there are two lists:

- The WFM Users list contains these columns: User Name, User First Name, User Last Name, User E-mail, and Role.
- The Genesys Users list contains these columns: User Name, User First Name, User Last Name, and User E-mail.

Creating roles

To create a security role:

1. Go to **Configuration > Roles**.

2. In the **Role** pane, click **New** .
A new security role appears in the Role pane with a default name.
3. In the **Role Privileges** pane, change the **Name** of the role (if desired).
4. Assign privileges by expanding items in the list and selecting/clearing the check boxes.
For a complete description of all privileges, see Role privileges.

5. Click **Save Now** .

Next Step: Assign the security role to a user.

Using copy to create roles

To create a security role using copy:

1. In the **Roles** pane, select an existing role.
If there are many roles in the list, enter the role name in the Search field to find it quickly.
2. Click **Copy** .
A copy of the selected role appears in the Roles list.
3. Select the copy and click **Role Privileges**.
4. Rename and assign privileges to the role by selecting or clearing the check boxes, as required.

5. Click **Save Now** .

Editing roles

To edit a security role:

1. In the **Role** pane, select the role you want to edit.
If there are many roles in the list, enter the role name in the Search field to find it quickly.
2. Click **Role Privileges**.
3. Rename the role and/or select/clear the check boxes next to the privileges you want to change.

4. Click **Save Now** .

Deleting roles

To delete a security role:

1. In the **Role** pane, select the role you want to delete.

2. Click **Delete** .

3. When the **Confirmation** dialog appears, click **Yes** to proceed or **No** to cancel the action.

Important

Proceed with caution. If you select Yes, the action cannot be undone.

Assigning and removing role assignments

WFM enables you to assign and unassign security roles, and delete users from the **Assigned Users** list. These tasks are described in the procedures below.

Assigning roles to users

To assign users to the role:

1. At the top of the **Role Privileges** pane, click **Users** and then, do one of the following:

- Click **Assign Users**  to assign a WFM user to this role.
A new pane opens, containing a list of WFM users.
- Click **Import Genesys User**  to assign a Genesys user to this role.
A new pane opens, containing a list of Genesys users.

2. Select the users you want to assign to this role and click **Apply** .

3. In the **Users** pane, click **Save Now** .

Important

New users are automatically granted access to all modules, objects, and sites. Also, only users in the WFM Users list can access Workforce Management functionality (with the exception of WFM Web for Agents).

You can also create a new security role using copy and paste. See Using copy to create roles.

Removing role assignments

To remove a user's security role assignment:

1. In the **Assigned Users** list, select the user to want to unassign from this role.

2. Click **Unassign User** .
3. When the **Confirmation** dialog appears, select **Yes** to proceed or **No** to cancel the action.
4. Click **Save Now** .

Deleting users from the Assigned Users list

To delete a user from the Assigned Users list:

1. In the **Assigned Users** list, select the user to want to remove from this list.
2. Click **Delete User** .
3. When the **Confirmation** dialog appears, select **Yes** to proceed or **No** to cancel the action.
4. Click **Save Now** .

Important

Proceed with caution when clicking **Yes** in the Confirmation dialog. Doing so removes all of the user's role privileges and access rights to WFM.