GENESYS

Workforce Management Web for Supervisors (Classic) Help

Users

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  - Supervisor

Configure user properties, security roles, privileges, and access rights. *Users* are supervisors and other persons who are not agents.

Related documentation:
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Users are divided into two groups:

1. Users who have been imported into WFM (WFM users).

2. Users who are configured in Genesys but not selected as WFM users (Genesys Users).

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

- View a list of existing WFM users.

- View user properties.

- Configure a specific time zone, WFM Builder instance, and security role for a user (in the user properties optional settings).

- View and edit security role privileges.

- Grant or remove a user's access rights to business units, sites, and teams.

- Grant or remove a user's access rights to notifications.

Tip
If the user's role privileges are changed in this module and they no longer match the privileges set in the Roles module, the following dialog appears:

Figure: Confirmation Dialog

Click **Yes** to unassign the current security role or click **No** to cancel the action and retain the user's current security role.

Users pane

This pane contains a list of users that have been imported into Workforce Management. It has the following columns: **Username**, **First Name**, **Last Name**, and **E-mail**. You can add users to this list (see Users), or delete them.

In this pane, you can:

- Import Genesys users into WFM by clicking **Import Genesys User** .

- Delete users by selecting them in the list and clicking **Delete** .

- Search users by entering their usernames in the **Search** field.

- Sort the list by clicking the **Username**, **First Name**, or **Last Name** column headers.

Importing Genesys users

When you import Genesys users, a pane opens that includes a drop-down list of the existing security roles. By default, the user you select is assigned the first role in this list. If no security roles exist, the list displays . All imported users are assigned to the role selected from the list.

After the import is finished, the **Users** pane displays the new users in its list. You can then select a user and change or configure their settings in the **Properties**, **Role Privileges**, or **Access Rights** pane.

User properties

The **Users Properties** pane contains information about the selected WFM user.

Read-only user information

The **User Information** pane contains the following read-only fields, previously entered in Genesys Administrator:

- First Name of the user as entered in Genesys Administrator.

- Last Name of the user as entered in Genesys Administrator.

- Email. This is the user's email address entered in Genesys Administrator. WFM uses this email address for notification of:

  - Changes in the status of schedule trade requests.

  - Changes in the status of time-off requests.

For more about email notifications, see the *Workforce Management Administrator's Guide*.

Configuring optional settings

To configure the optional settings in the **User Information** pane:

1. Select a time zone for the user or leave blank. The time zone can be used in some **Performance** views and reports as an alternative to the site or business unit time zone. If you configured a default time zone before importing the user, that time zone will be the one that is displayed. If you did not configure a default time zone, appears here.

> ### Important
> If you subsequently changed the default time zone, the time zone set as default when the user was imported appears here.

    To set a different time zone for this user:

    • Select the time zone from the drop-down list box. All time zones that have been imported into Workforce Management from the Configuration Database are included.

    If you need additional time zones, use the **Organization > Time Zones** view to change the time zones that appear in the list. See Time Zones List for details.

2. Select a **WFM Builder** server for the user or leave blank. This is the server that builds schedules. To use a specific WFM Builder to create WFM schedules for a dedicated group of users:

    • Select the **WFM Builder** server from the drop-down list.

    You do not need to specify a WFM Builder server if you want all users to share the same one. The default value is **None**.

3. Select the security role for the user or leave blank. If you select a security role, the user adopts the role privileges that you configured for that security role. If the user is not assigned to a security role:

    • Clear the check boxes next to the names of the role privileges the user should not have permission to access. By default, all options are selected.

4. Click **Save Now** 🖫 .

User role privileges

The **Users > Role Privileges** pane contains a list of security role privileges that are assigned to the selected user. They are described in detail in Role privileges.

To change a user's role privileges:

1. Select a user and then, click the check box beside the privileges you want to change.
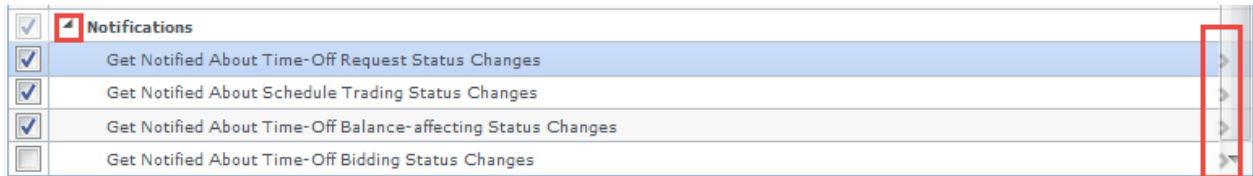
2. Click **Save Now** 🖫 .

Click **Help** to view a Help topic about this pane.

Granting access rights to notifications

To grant access to notifications:

1. In the **Role Privileges** list, click the arrow to expand **Notifications**, as shown in the figure below.

Figure: Role Privileges—Notifications

2. Click the arrow in the appropriate row to grant the selected user access to receive notifications about one of the following status changes:

   - Time-off request status changes

   - Schedule trading status changes

   - Time-off balance-affecting status changes

   - Time-off bidding status changes

3. A new pane opens, enabling you to grant access rights to the specific notification privilege you selected. For example, if you clicked the arrow in the first row, the **Grant Access** rights for **Get Notified About Time Off Request Status Changes** pane opens.

4. In the new pane, do one of the following for the selected privilege:

   - Add access rights

   - Remove access rights

   - Close this pane and cancel any changes you made

   - Open a Help topic related to this pane

5. When you have completed all tasks, in the **Role Privileges** pane, click **Save Now** .

User access rights

The **Access Rights** pane displays the business units, sites, and teams, to which the user has been given access. Use the controls in the top-right corner of these panes to complete all of the tasks described in this topic.

Access Rights controls

- **Remove security rights to selected BU leaving sites unchanged**—Click to remove the user's access rights to the selected business unit, but retain the user's access rights to the sites within this BU.

- **Add Access Rights**—Click to open and select items to grant user access (below) to selected business units, sites, or teams within the enterprise. Objects to which the user already has access rights are not displayed in this pane.

- **Remove Access Rights to selected items**—Click to remove the user's access rights to selected objects.

- **Help**—Click to view a Help topic about the **Access Rights** pane.

- **Save Now**—Click to save any changes you made to the user's access rights.

Grant Access to Users controls

- **Apply**—Click to assign the user access to the selected items.

- **Close**—Click to close this pane without applying any changes.

- **Help**—Click to view a Help topic about this pane.