Workforce Management Web for Supervisors (Classic) Help

Getting started

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Contents

Get an overview of the task that supervisors can perform using WFM and learn about some preliminary task that you can do to get started.

Related documentation:

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This Help provides a comprehensive guide to the features and functions of the Workforce Management (WFM) Web for Supervisors (Classic) interface. In addition, it offers some general guidance on using web browsers. If you require more assistance on using your web browser, refer to the browser's Help system.

Site supervisors can use a web browser to log in to WFM Web for Supervisors 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.

Web version and settings

To find the WFM copyright information, WFM Web server version, and **Settings...**, click **About** in the top right corner of the WFM Web UI (near **Log out**) to open the **About** window.

Click **Settings...** to change the GUI colors or font sizes, and some application settings.

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.

Supporting mobile agents

In addition to the WFM Web for Agents desktop interface, WFM Web includes the Agent Mobile Client web interface, which is optimized for mobile devices. To enable agents to access WFM Web for Agents UI on their mobile devices, provide agents with the same URL that you gave them to enable access on their desktop.

Agents can use the latest supported version of Safari on their iOS devices and the latest supported version of Google Chrome on their Android devices.

Advise agents that their browser screen's *actual* resolution must be at least 320 by 550. WFM does not support anything less than either dimension.

Printing this online Help

If you prefer to print the Help rather than use it online, complete the following steps:

1. In the **Navigation** pane on this page, at the bottom of the **Table of Contents**, click **PDF Version**.
2. When the dialog opens, select:
    *   **Open with** to select the application, with which you want to view and print the Help.
        Adobe Acrobat v9 is recommended.
    *   **Save File** to save the Help to a folder on your computer.
        When the download is complete, navigate to the folder that contains the saved .pdf file, open and view the file on your computer offline.
3. Use the Print function in your application to print the document.

Glossary terms

The acronyms and abbreviations that appear on Workforce Management screens and throughout the document appear as links that reference a glossary containing definitions for these terms. You can view definitions by clicking the link (in bold red) and it will open in a pop-up window on the page you are viewing. For example, Average_Handle_Time.