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Workforce Management Web for Supervisors (Classic) Help

Role Privileges

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- Supervisor

Assign role privileges to users, enabling them to perform various actions or tasks in WFM modules and views.

Related documentation:

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The **Role Privileges** pane in the **Roles** module displays an extensive list of modules and objects, to which you can control access. The same list of privileges appears when you select a user in the **Users: Role Privileges** pane in the **Users** module.

Important

New users are automatically granted access to all modules, objects, and sites as described in the Role Privileges overview and sub topics.

General role privileges

The role privileges under **General** provide the following user access:

- **Show agent wage field**—Controls user access to view the **Hourly Wage** field in WFM Web for Supervisors **Configuration > Agents > Properties** pane. It also controls whether the user will see agent wage information in the Agent Properties report.
- **Show unassigned agents**—Controls whether the selected user can view unassigned agents that appear in all lists where agents appear. The lists appear in the **Organization** module in **Sites > Teams > Add Agents** and **Sites > Agents > Add Agents**.

Important

New agents without logins (or with logins to multiple switches) are imported automatically during synchronization even if the **Show unassigned agents** option is turned off for the user who triggers synchronization; although they are not visible to this user. The only security for these new agents is **Tenant** security.

- **Allow Backup/Restore**—Controls user access to the WFM Database Utility to perform backups and

restores. If cleared, the user cannot log into the Database Utility. For more information on this utility, see the *Workforce Management Administrator's Guide*.

Configuration role privileges

Some privileges under **Configuration** are Supervisor views in the **Configuration** module (Read, Edit, Add/Delete, Access Backend Configuration, and Skills settings are not). Select the check box next to each privilege to give the selected user access to configure items related to that privilege.

The role privileges under **Configuration** provide the following user access:

- **Roles/Users**
- **Agents**
 - **Read**—Controls user access to view all panes within the **Agents** views. If unchecked, all other privileges under **Agents** are also unchecked.
 - **Allow Move**—Controls whether this user can move agents to a different team, site, or business unit.
 - **Edit Properties**—Controls whether this user can edit items in the **Properties** pane in the **Agents** view.
 - **Edit Activities**—Controls whether this user can edit items in the **Activities** pane in the **Agents** view.
 - **Edit Contracts & Rotating Patterns**—Controls whether this user can edit items in the **Contracts & Rotating Patterns** pane in the **Agents** view.
 - **Edit Time Off**—Controls whether this user can edit items in the **Time Off** pane in the **Agents** view.
 - **Edit Time-Off Bonuses**—Controls whether this user can edit items in the **Time-Off Bonuses** pane in the **Agents** view.
- **Organization**
 - **Read**—Controls user access to view all panes within the **Organization** views. If unchecked, all other privileges under **Organization** are also unchecked.
 - **Edit**—Controls whether this user can edit items in all views and panes within this module.
 - **Add/Delete**—Controls whether this user can add and delete items in all views and panes within the **Organization** view.
 - **Access Backend Configuration**—Controls configuration access to certain panes in this module. If this right is not assigned to the user these panes and fields are not visible:
 - The **Configuration** pane in **Organization > Business Units** and **Organization > Sites** views.
 - The **Statistics** pane in **Activities** and **Multi-Site Activities** views.
 - The **WFM Builder** field in **Users > Properties** pane.
 - **Skills**—Controls user access to skills configuration in the **Organization > Business Units** views.
 - **Time Zones**—Controls user access to time zones configuration in the **Organization** view.
- **Schedule State Groups**—Controls whether this user has access to the **Schedule State Groups** view

in this module. Users with this permission can modify the configuration of these groups.

- **Read**—Controls user access to view all panes within the **Schedule State Groups** views. If unchecked, all other privileges under **Schedule State Groups** are also unchecked.
- **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Schedule State Groups** view.
- **Notifications**—Controls whether this user has access to the **Notifications** view in this module. Users with this permission can modify the configuration of email notifications in WFM.
- **Colors in Schedule**—Controls user access to custom colors configuration for elements in the schedule.
- **Shared Transport**—Controls user access to shared transport functionality (enabled by default). Clear this check box to disable.
- **Time-off Bidding Periods**—Controls user access to the **Time-Off Bidding Periods** view.
 - **Read**—Controls user access to view all panes within the **Time-Off Bidding Periods** view. If unchecked, all other privileges under **Time-Off Bidding Periods** are also unchecked.
 - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Time-Off Bidding Periods** view.
- **Activities**—Controls access to the **Activities** and **Multi-Site Activities** views.
 - **Read**—Controls user access to view all panes within the **Activities** view. If unchecked, all other privileges under **Activities** are also unchecked.
 - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Activities** view.

Policies role privileges

Most of the items under **Policies** are all WFM Supervisor views in the **Policies** module (**Read** and **Add/Edit/Delete** are not). Select the check box next to each privilege to give selected users access to configure items related to that privilege.

The role privileges under **Policies** provide the following user access:

- **Read**—Controls user access to view all panes within the **Policies** module. If unchecked, all other privileges under **Policies** are also unchecked.
- **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Policies** module.
 - Time-Off Rules
 - Contracts
 - Shifts
 - Exception Types
 - Meetings
 - **Read**—Controls user access to view all panes within the **Meetings** views. If unchecked, all other privileges under **Meetings** are also unchecked.
 - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and

panes within the **Meetings** view.

- Rotating Patterns
- Marked Times
- Time-Off Types

To have this user receive email notifications when there are time-off requests that require manual review, select **Get Notified About Time-Off Request Status Changes**, which appears under Notifications.

Calendar role privileges

The role privileges under **Calendar** provide the following user access:

- **Read**—Controls user access to view all panes in the **Calendar** module. If unchecked, all other privileges under the **Calendar** are also unchecked.
- **Add/Edit/Delete**—Controls user access to view, add, and edit agent preferences and exceptions in the **Calendar** module.
- **Prefer/Grant/Decline**—Controls user access to grant or decline agent preferences in the **Calendar** module.
- **Edit Time-Off Limits**—Controls user access to edit time-off limits in the **Calendar** module.

Forecast role privileges

The role privileges under **Forecast** provide the following user access:

- **Read**—Controls user access to:
 - Creating Forecast Scenarios.
 - Viewing and edit shared Forecast Scenarios.
 - Viewing the Master Forecast.
 - Extracting the Master Forecast to their own or shared Scenarios.
 - Viewing Historical Data.

Important

If **Read** is unchecked, all other privileges under **Forecast** are also unchecked.

- **Publish**—Controls user access to all **Read** permissions plus permission to publish to the Master their own Forecast Scenarios or shared scenarios.

Three security options are available under this **Forecast Publish** right:

- **Publish IV to Master Forecast**
- **Publish AHT to Master Forecast**
- **Publish Staffing to Master Forecast**

If only one or two of these permissions are granted, the user will not have full security access to the Publish.

Important

Only those users who have access to **Publish** before migration will have access to the new options after migration.

- **View All Scenarios**—Controls user access to all **Read** permissions plus permission to:
 - View, edit and share all Forecast Scenarios.
 - Extract from the Master Forecast to all Scenarios.
- **Edit Historical Data**—Controls user access to all Read permissions plus permission to:
 - Edit historical data to be used when creating a Forecast Scenario.
 - Copy/paste historical data to/from Excel.
- **Overlays**—Controls user access to all Read permissions plus access to all Overlays functionality in the **Forecast** module.

Schedule role privileges

Select the check box next to each item to give permission to perform that action:

- **Read Master**—Controls user access to view and extract data from the Master Schedule, but not publish to the Master Schedule (see About Read Master). If unchecked, all other privileges under Schedule are also unchecked.
- **Edit Master**—Controls user access to edit the Master Schedule.
- **Publish**—Controls user access to publish scenarios to the Master Schedule.
- **Clean Up Master**—Controls user access to clean up the Master Schedule.
- **Create Scenario**—Controls user access to create scenarios.
- **Access Shared Scenario**—Controls user access to all schedule scenarios that are marked as **Shared**.
- **View All Schedule Scenarios**—Controls user access to view all schedule scenarios that are marked as **Shared**.
- **Build**—Controls user access to build schedules.
- **Approve Changes**—Controls user access to the **Changes Approval** module, to approve or decline pending changes in schedules that you or others have made.

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- **Access Overtime Requirements**—Controls user access to all scheduled overtime requirements that are marked as **Shared**.
 - **Overtime Bidding**—Controls user access to the **Overtime Bidding** view and the ability to create, modify, and initiate processing of overtime bidding offers.
 - **Read**—Controls user access to view all panes within the **Overtime Bidding** views. If unchecked, all other privileges under **Overtime Bidding** are also unchecked.
 - **Add/Edit/Delete**—Controls whether this user can add, edit, and delete items in all views and panes within the **Overtime Bidding** view.

About Read Master

Check **Read Master** privilege to give user access to view and extract data from the Master Schedule, but not publish to the Master Schedule. Use the remaining check boxes under Schedule to give additional permissions.

When **Read Master** is selected, the user can:

- Extract data from the Master Schedule to an owned or shared Schedule Scenario.
- View their own Schedule Scenarios and/or other Schedule Scenarios designated as *shared* by the creator.

About schedule scenarios

When working in Web for Supervisors, you can build multiple Schedule Scenarios that may contain different agents, different types of shifts or rotating patterns, etc. You will eventually decide to publish all or part of one of these scenarios to the Master Schedule.

Trading role privileges

The role privilege under **Trade** provides the following user access:

- **Trading**—Controls user access to trading information in WFM Web for Supervisors.
 - **Read**—Controls user access to view all panes within the **Trading** module. If unchecked, all other privileges under **Trading** are also unchecked.
 - **Approve Trades**—Controls whether users can accept or decline agents' schedule trade proposals and add comments in all views and panes within the **Trading** module.

To ensure users receive email notifications when there are agent trade requests that require manual review, select **Get Notified About Schedule Trading Status Changes**, which appears under Notifications.

For more information, see Trading.

Performance role privileges

The role privileges under **Performance** provide the following user access:

- **Read**—Controls user access to view Performance information in WFM Web for Supervisors. All users who have the **Read** privilege for the **Performance** module can see alerts when the configured thresholds have been exceeded.
- **Update Alerts**—Controls user access to modify alert thresholds and save changes in the **Alerts** view in the **Performance** module where users configure thresholds for each metric.

Important

The Alerts function in WFM Web for Supervisors uses Master Forecast and Schedule data as a baseline for acceptable performance results. If user-defined performance limits are violated (for example, if too many interactions are being abandoned, or if service levels fall too low), an **Alert** warning in the **Monitor** view notifies that action may be necessary.

For more information, see Performance overview.

Adherence role privileges

The role privilege under **Adherence** provides the following user access:

- **Adherence**—Controls user access to the **Adherence** module in WFM Web for Supervisors, which monitors real-time agent adherence to the schedule.

For more information, see Adherence.

Reports role privileges

The role privileges under **Reports** provide the following user access:

- **Read**—Controls the user's read access to all views and panes within the **Reports** module. If unchecked, all other privileges under **Reports** are also unchecked.
- **Reports Scheduler**
 - **Allow Use of Reports Scheduler**—Control user access to the Reports Scheduler, enabling them to schedule reports generation.
 - **View All Scheduled Reports**—Control user access to view all scheduled reports.

Selecting the check box next to a report enables the selected user to create that report.

For information on how to generate and read Reports, see Reports.

Notification role privileges

The role privileges under **Notifications** provide the following user access:

Selecting the check box for each item enables that notification (the default state). Clearing the check box disables that option:

- **Get Notified About Schedule Trading Status Changes**
- **Get Notified About Time-Off Request Status Changes**
- **Get Notified About Time-Off Balance-Affecting Changes**
- **Get Notified About Time-Off Bidding Status Changes**

Tip

You can set fewer objects (than those in **Configuration > Notification > Targets**) for each user that will be notified by the settings in **Users > Role Privileges > Notifications**.