Workforce Management Web for Supervisors (Classic) Help
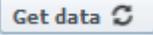
The Supervisor's window

6/9/2026

Contents

Learn how to use the Web for Supervisors controls, icons, modules, and views to customize the GUI display.

Related documentation:

-

The panes in WFM Web for Supervisors display some combination of the controls described below, depending upon selections that you make in the Object pane. For more information, see the description of the Get Data button in the table below.

Generic buttons	The following buttons appear at the top right of every WFM Web window:
🏠	**Home** displays the Home view, which is a list of all View menu options that is organized by tab.
🔄	**Refresh** applies to the current view.
About button	**About** displays information about copyright and the current version information.
Logout button	**Logout** closes WFM Web, without confirming your choice if there are no changes to save.
⬇	**New Page** displays a new web page of WFM Web. Default view is Home.
Help button	**General Help** displays WFM Web help at the Overview topic.
❓	**Contextual Help** displays WFM help at the current topic.
🔍	**Search** enables you to enter search criteria to quickly find the object you are looking for. The criteria you enter will depend on which pane you have open.
⚏	**Sort** enables you to sort lists to easily find the items you are looking for. The sorting criteria will vary, depending on which pane you have open.
‹‹ ‹ › ››	**Paging controls** enable you to browse the previous and next pages or navigate to the first and last items in the data set (start and end of the list), by clicking the appropriate arrow button in the view. To navigate between pages, you can use the **Up**, **Down**, **Page Up**, and **Page Down** keys on the keyboard.
Modules	Click to open each WFM module: **Configuration**, **Policies**, **Calendar**, **Forecast**, **Schedule**, **Trading**, **Performance**, **Adherence**, and **Reports**.
Breadcrumb navigation	WFM for Supervisors uses the same type of

	"breadcrumb navigation" as you see in Windows 7 directories and across the top of some web browser windows. Click any link in this display to choose from a drop-down menu and make a selection within that branch of the currently selected module. For example, the following breadcrumb navigation path will display a specific schedule scenario for the currently selected date: 🏠 **Home** > 🧩 **Schedule** > **Scenarios** > **Q4-2010** > **Q4-2010 Intra-day**
Edit menu (**Copy**, **Cut**, **Paste**, **Find**)	Each of these commands becomes enabled when it can be performed on the currently selected object.
Actions menu	Select from a list of view-specific commands. This menu's contents change as you move among modules and views, and they match the command icons that appear on the toolbar.)
Actions toolbar	These buttons correspond to the commands on the **Actions** menu. Hover your mouse pointer over a toolbar button to see a tool tip that displays the button's name.
Action buttons	View-level action buttons within the working pane provide controls that are specific to particular views (for example, apply or cancel). The **Get data** button `Get data ⟳`, when present at the lower left below the Objects tree, refreshes the display with current data from the database. **Tip** Not all modules use the **Get data** button. If there is no **Get data** button, the view is automatically updated with the new data every time that you change your date or object selection.
Objects pane	This pane offers several different display schemes, depending on the current selection of tab and menu item: **Tabs:** module-specific item trees under separate tabs One tree: **Business Units (BUs) > Sites** One tree: **BUs > Sites> Activities** Upper tree: **BUs > Sites> Teams > Agents** Lower tree: **BUs > Multi-site Activities > Activity Groups > Sites > Activities** When there are two selecting items in either of these two trees, it triggers an automatic selection of corresponding items in the other tree. At the site level, you may see a team in the tree labeled None>. This node lists any agents that are assigned to the site, but not assigned to a team. If all agents in that site are assigned to a team, then the None> team is empty. The only exceptions to this hierarchy are when **Scenarios** is selected or when you use

	the **Configuration** or **Reports** modules. Clicking an object in a tree (or clicking its expand/collapse controls) displays the object's contents below it, indented slightly. When you have displayed the desired object, double-click it (or click it once, and then click **Get data**) to open the selected view for that object. Where the Objects tree displays check boxes, you can usually select/deselect multiple objects by selecting (☑) / clearing (☐) their check boxes, respectively. Certain views do not display check boxes; in this case, you can select multiple objects by clicking the group of objects while pressing the **SHIFT** or **CTRL-key**. Some views and windows allow you to select only a single object.
Expand/collapse controls	Wherever you see the ▷ icon in a tree or other control, you can click it to see an expanded view of the adjacent item's contents or details. The ◢ icon indicates an expanded item. Click it once to collapse the item's contents and see more parallel items.
Working pane (or **Data pane**)	The right pane of the window displays data and controls that correspond to your selected module and view. Some views display graphs with an explanatory legend below them.
Status bar	The status bar, at the very bottom of the window, displays messages about WFM Web's current state. (In some views, it displays the most recently generated warning or error message.)

Retrieving a list of items in segments

The list of items or objects (such as **Agents**, **Shifts**, **Profiles**, **Activities**, **Schedule States**, **Contracts**, and **Rotating Patterns**) in a pane is displayed in segments or sequential pages. When large amounts of data are being retrieved, the list of items in the pane is displayed in smaller segments sequentially, with 50 items per page. This limits the number of items that are retrieved from WFM at any given time, maintaining optimal performance during retrieval. See Paging controls.

Customizing tables in WFM views

Many WFM Web views include on-screen tables. You can typically customize the display of these tables in one or both of the following ways:

Resize Columns	In the table's header row, place your mouse pointer over the separator between two column headers. When you see a two-headed arrow, click and drag the column separator to adjust the column widths.
Sort by Column	In some tables, you can sort the data according to one of the displayed columns. Specify the column

	by clicking its header.
	You can change the sort order by clicking the header again. An upward-pointing arrowhead in the header indicates ascending order. A downward-pointing arrowhead indicates descending order.

If the **Agent** column is specified as the sort key, in ascending order, it will read **Agent ^**

Finding agents in tables

In a number of Web for Supervisors views, you can search for particular agents by using the **Find Agent** dialog box. To open it, select the table you want to search and then either:

- Select **Find** from the **Edit** menu.
- Press **[Ctrl] + F**.

You can search for agents in these views:

- The **Calendar** view.
- The table in the **Schedule Scenario Weekly View** and **Master Schedule Weekly View**. Select a cell in the **Agent Name** column to activate the **Find** command.
- The table in these views:
  - Schedule Scenario Agent Extended
  - Schedule Scenario Intra-Day
  - Master Schedule Agent Extended
  - Master Schedule Intra-Day

To search for one or more agents:

1. In the **Find Agents** dialog box, type either the full name for which you are searching or its first few letters.
2. Select the **Last Name** or **First Name** radio button.
3. Click **Find**.
   The table that you are searching now shows the first agent listed whose name matches the search string that you entered. A message box informs you if there are no agent names that match your search criteria.
4. Click **Find** again to find the next agent whose names matches the string you entered. You can search as many times as you want.
5. When you have finished searching, click **Close**.

Displaying terminated agents in tables

You can enable WFM to display terminated agents wherever agents are displayed in lists or tables in

the **Schedule**, **Calendar**, **Trading**, **Adherence**, **Policies**, **Configuration**, **Reports** views. By default, WFM does not display terminated agents.

Change the default value of the CFG_SHOW_TERMINATED_AGENTS setting in **About** > **Settings...**. For more information, see More WFM Web application settings.