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Genesys Engage cloud Workforce Management 8.5.1 Guide

Getting Started

5/8/2025

Getting Started

Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to [Workforce Management in Genesys Engage cloud](#).

With Workforce Management for Cloud (WFM Web), site supervisors can use a web browser to:

- 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.
- Configure e-mail notifications.

Site Freedom

- WFM Web is optimized for a screen resolution of at least 1024 x 768. At lower resolutions, some elements (such as table headers) might not display correctly.
- If you are using Mozilla Firefox, Genesys recommends that you not run WFM Web in more than one browser window on the same workstation, because doing so can cause the application to behave in unexpected ways.
- If you are using Internet Explorer, Genesys recommends (for the same reason) that you not open a second browser window on the same WFM Web session by selecting **File > New** or pressing **Ctrl+N**. However, starting a separate WFM Web session by launching a separate Internet Explorer browser

thread does not appear to cause this problem.

Security Features

WFM Web includes security features that prevent unauthorized access to information:

- You can view and make changes only to those modules (such as **Calendar** or **Schedule**) and objects (such as sites) for which you have security access. You cannot access other modules or objects.
- Configuration and security options enable you to restrict access to agents' personal information, such as wages.
- Agents use a separate application (WFM Web for Agents), which enables them to view and change their own information. They have limited access to other agents' schedule information, but only if schedule trading is enabled at your site. Agents can also access this application on their Android, smartphone, or other mobile device if the supervisor provides the URL.

Setting the Clock

WFM Web 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.

System Login Timestamp

The timestamp information from the previous login is displayed in the WFM Web GUI the next time you log in through the Supervisor interface, alerting you to any unauthorized use of your login credentials.

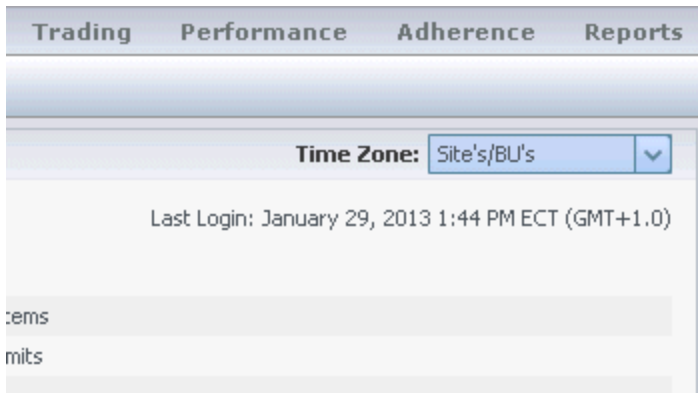


Figure: Web for Supervisors Login Timestamp

If you do not set the timestamp to the browser time zone, the time zone for the location at which you log in is used in the timestamp. The timestamp is displayed in the top-right corner of the **Home** page, below the list of modules and breadcrumbs bar.

Links to Further Information

The Supervisors Window	Explains the layout and functions of the WFM Web controls.
Policies	Explains how to configure the following policies: Exception Types , Meetings , Time-Off Types , Time-Off Rules , Marked Time , Shifts , Contracts , and Rotating Patterns .
Configuration	Explains how to configure Shared Transport , Agents , Organization objects, such as Business Units , Sites , and Time Zones , Schedule State Groups and Activities . Notifications explains how to configure e-mail notifications. Colors explains how to configure the colors that WFM uses in the Supervisor schedule views.
Calendar	Explains how to view, add, edit, and delete preplanned items, such as exceptions and preferences; how to grant or decline these items; and how to set time-off limits.
Forecast	Explains how to forecast staffing requirements based on projected interaction volumes and service objectives.
Schedule	Explains how to build, view, share, edit, and delete published and unpublished schedule scenarios.
Schedule Bidding	Explains the schedule bidding process, including: creating a scenario, bidding, bid resolution and publishing to the Master Schedule .
Trading	Explains how to view, and approve or decline, agents' desired schedule trades.

Performance	Explains how to view actual contact center performance compared with planned performance based on key indicators such as Service Level, Average Speed of Answer (ASA), and Abandonment.
Adherence	Explains how to view agents' real-time adherence to their schedules in both tabular and graph formats.
Log Off	Explains how to end your WFM Web session.