



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Workforce Management Agent Help

Using common settings and controls

12/15/2025

Contents

- 1 Using common settings and controls
 - 1.1 Changing the date
 - 1.2 Changing the settings in a view
 - 1.3 Using the page navigation controls
 - 1.4 Using the keyboard to sort columns
 - 1.5 Viewing graphics in this Help

Using common settings and controls

Every view in the Workforce Management (WFM) Agent application has a **Menu** bar across the top that lists the names of the modules within the application: **Schedule**, **Trading**, **Preferences**, **Time Off**, **Bidding**, or **Configuration**. Click these names to move from module to module or to see a drop-down list of the views in each module. In the drop-down list, click the views to open them.




Tip

You might see all of these items on your **Menu** bar or only a few, depending on the options that your supervisor has configured for you.

Your username and the **Help** icon  appear in the top-right corner of every window.

Changing the date

When you open the WFM Agent application, your schedule displays the current week, by default. (To change the default setting, see the **On Startup** section of **My Settings**.)



If you want to display a different week in your schedule, change the date, by using the date arrow buttons **Previous**  and **Next**  or the pop-up calendar button . See the figure below.

October 16, 2016 - October 22, 2016   

Figure: Date and Calendar buttons

Similar buttons appear in other WFM Web views. In some views, they move you by different time intervals, as discussed below.

To use the date arrows:

- Click  to move backward.
 - In the **Schedule**, **Trading**, and **Preferences** views, you reach the previous week.
 - In the **Time Off** view, you reach the previous year.
- Click  to move forward.



- In the **Schedule**, **Trading**, and **Preferences** views, you reach the next week.
- In the **Time Off** view, you reach the next year.

To use the pop-up calendar:

1. Click the **Calendar** button .
A calendar appears.

2. Set new dates:


1. Click a day to select the week containing that day.
2. Click the month drop-down list to jump to a different month.

3. Click  or  on either side of the year to jump forward or back one year.

3. Click **OK**.
The window automatically refreshes to match your date selection.

Changing the settings in a view


You can change the settings in all of the views in the **Schedule**, **Trading**, **Preferences**, and **Time Off** modules (except the **Preferences > Availability Patterns** view).

- Click **Settings**  in the upper-right corner of the view to add additional columns or change the data that is displayed.
The settings are different for each view.

Using the page navigation controls

When any of the WFM Agent views has more than one page of data, use the navigation buttons **First**

, **Previous** , **Next** , and **Last**  to move between the pages. These

buttons are grouped with a numeric indicator of your position within the pages:  1 of 1

.

Using the keyboard to sort columns

You can use the number keys on your keyboard to sort columns in any views that have tables with sortable columns.

To sort columns using the keyboard controls:

1. Place your cursor inside a table.
2. Press the number key on your keyboard that corresponds to the column number, when counting left to right.
For example, if the column is the third one from the left, press "3". The key acts as a toggle, sorting the column in ascending or descending order.

Viewing graphics in this Help

If you are viewing this Help online, click any graphic to enlarge it. Click the "X" in the top-right corner to close the enlarged graphic window.