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Workforce Management Administrator's Guide

Managing WFM roles in GAX

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Although Workforce Management (WFM) has its own set of roles and privileges, there might be a need in your contact center to have finer control over agents' access to certain WFM features and functionality. Besides the WFM Web application options that are applicable for all agents, Genesys Administrator Extension (GAX) provides another level of control and flexibility, with roles and privileges that enable you to customize individual agent's access or a group of agents who might need similar access.

Assigning WFM roles and privileges in GAX

Purpose: To enable roles and privileges for WFM agents using Genesys Administrator Extension.

Start of Procedure

1. In the WFM Web Application, set the **[Functionality]** useRolesSecurity configuration option value to true.
2. In GAX, import the WFM_Web.xml file containing descriptions of the available WFM Web security rights.
See *Genesys Administrator Extension Help*
3. In GAX, go to **Configuration > Accounts > Roles**.
4. Open the WFM Role object to which you want to assign privileges.
5. In the **Assigned Privileges** section, find **CfgWFMWeb**.
WFM privileges are listed under CfgWFMWeb in the object tree.
6. Assign agents to Access Groups that have appropriate roles and privileges, or assign roles and privileges directly to individual agents.
After you assign access rights or privileges, agents can access only the functionality that is enabled for them. See the WFM roles and privileges in the *table below*.

End of Procedure

Tip

Agents who have no assigned roles or privileges, by default can access only the **Schedule** and **Configuration** modules in WFM Web for Agents. If you assign more than one role to an agent and at least one of the roles grants a specific right, then the agent has that right.

WFM privileges in GAX

You can assign the following privileges to WFM agents using Genesys Administrator Extension. Check the related Application option to see a description of the functionality.

Important

New Access Groups must be assigned SYSTEM privileges to ensure they work as expected.

Privilege	Related Application option
WFM_AGENT_TRADING_ALLOW_ACCESS	AllowScheduleTrading
WFM_AGENT_TRADING_TRADE_ONLY_INSIDE_TEAM	TradeOnlyInsideTeam
WFM_AGENT_TRADING_ALLOW_ENTER_COMMENTS	AllowNoComments
WFM_AGENT_TIMEOFF_ALLOW_ACCESS	AllowTimeOffPlanner
WFM_AGENT_TIMEOFF_ALLOW_ENTER_PAID_TIME	AllowEnterPaidTime
WFM_AGENT_TIMEOFF_ALLOW_ENTER_FULL_DAY_START_END	AllowEnterFullDayStartEnd
WFM_AGENT_SCHEDULE_ACCESS_LEVEL_TEAM	AccessLevel
WFM_AGENT_SCHEDULE_ACCESS_LEVEL_SITE	AccessLevel
WFM_AGENT_SCHEDULE_ACCESS_LEVEL_BU	AccessLevel
WFM_AGENT_SCHEDULE_ALLOW_ACCESS_TO_OTHERS_SCHEDULE	AllowAccessToOthersSchedule
WFM_AGENT_SCHEDULE_ALLOW_INSERT_EXCEPTIONS	AllowInsertExceptions
WFM_AGENT_SCHEDULE_COMMIT_AGENT_INSERTED_EXCEPTIONS	CommitAgentInsertedExceptions
WFM_AGENT_BIDDING_ALLOW_ACCESS	AllowBidding
WFM_AGENT_CONFIGURATION_ALLOW_ACCESS_TO_CARPOOLS	AllowAccessToCarpools
WFM_AGENT_PREFERENCES_ALLOW_ACCESS	AllowPreferences
WFM_SCHEDULE_INSERT_PAYBACK_EXCEPTION	InsertPaybackException
WFM_SCHEDULE_LIMIT_SCHEDULE_DETAILS	LimitScheduleDetails