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Workforce Management Web for Supervisors Help

Creating, Editing, and Deleting Sites

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Creating, Editing, and Deleting Sites

Use the following **Site** pane controls to **create**, **edit**, and **delete** sites:

 Search <i>field</i>	Enter the search criteria. For example, the name of a site.
 New	Click to add a new site.
 Delete	Click to delete an existing site.
 Copy	Click to copy the selected site.
 Help	Click to open a Help topic for the Sites pane.

Creating New Sites

1. In the **Configuration** module, select **Organization > Sites**.
2. In the **Sites** pane, click **New** .
3. On the **Properties** pane, in the **Name** field, enter a name for the site.
The name must be unique in the WFM environment.
4. In the **Maximum Number of Seats** field, enter the maximum number of seats in this site.
5. From the **Time Zone** drop-down list, select a time zone for the site.
6. From the **Business Units** drop-down list, select the business unit, with which you want to associate this site.
7. In the **Alarm Threshold** field, enter a value for the alarm.
See **Alarm Threshold**, for information about this parameter.
8. Check the **Allow auto-approval of schedule trades** if you want the agents in this site to have automatic approval for any schedule trade requests. If not, leave the check box empty.
9. Check the **Allow Agents to Create Shared Transport** if you want the agents in this site to be able to make shared transport requests. If not, leave the check box empty.
10. Check the **Generate default Schedule State Groups and Exception Types** if you want WFM to create default schedule state groups and exception types. If not, leave the check box empty.
11. Check the **Associate existing exceptions with site** if you want WFM to verify that none of the newly created exception types for the site's BU have the same name as an existing exception type. If not, leave the check box empty.
12. Click **Save Now** .

For help with configuration of your new site, see [Site Properties](#).

Creating Sites Using Copy

To create a new site by copying an existing one:

1. In the **Sites** pane, select a site and click **Copy**  .
2. In the **Properties** pane, rename the new site and configure the properties, if required.

Although some of the configuration settings transfer from the original to the copy, you must do the rest of the configuration as described in [Site Properties](#) and [Associating Agents with a Site](#).

Editing Sites

To configure a site or edit its configuration:

1. In the **Sites** pane, select it.
2. Enter the appropriate settings as described in [Site Properties](#).
Settings on the **Agents** pane are described in [Associating Agents with a Site](#).

Deleting Sites

To delete an existing site:

1. In the **Sites** pane, select the site you want to delete.
2. Select **Delete**  .
3. When the **Confirmation** dialog opens, click **Yes** to continue or **No** to retain the selected site and its properties.