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Workforce Management Web for Supervisors Help

Assigning Roles to Users

5/4/2025

Assigning Roles to Users

WFM enables you to assign and unassign security roles, and delete users from the Assigned Users list. These tasks are described in the procedures below.

To assign users to the role:

- 1. At the top of the **Role Privileges** pane, click **Users** and then, do one of the following:
 - Click Assign Users to assign a WFM user to this role.
 A new pane opens, containing a list of WFM users.
 - Click **Import Genesys User** to assign a Genesys user to this role. A new pane opens, containing a list of Genesys users.
- 2. Select the users you want to assign to this role and click Apply
- 3. In the **Users** pane, click **Save Now**

Important

New users are automatically granted access to all modules, objects, and sites. Also, only users in the **WFM Users** list can access Workforce Management functionality (with the exception of WFM Web for Agents).

You can also create a new security role using copy and paste. See Editing Security Roles.

Unassigning Users from Roles

To unassign a user from a security role:

- 1. In the **Assigned Users** list, select the user to want to unassign from this role.
- 2. Click Unassign User
- 3. When the **Confirmation** dialog appears, select **Yes** to proceed or **No** to cancel the action.
- 4. Click Save Now

Deleting Users from Assigned Users List

To delete a user from the Assigned Users list:

- 1. In the **Assigned Users** list, select the user to want to remove from this list.
- 2. Click **Delete User**
- 3. When the **Confirmation** dialog appears, select **Yes** to proceed or **No** to cancel the action.
- 4. Click Save Now

Important

Proceed with caution when clicking **Yes** in the **Confirmation** dialog. Doing so removes all of the user's role privileges and access rights to WFM.