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# Workforce Management Supervisor Help

Common controls in the UI

12/14/2025

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## Contents




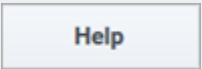




- 1 Common controls in the UI
  - 1.1 Date selectors

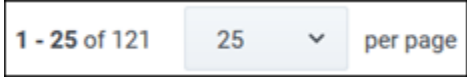
# Common controls in the UI





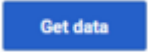
## Tip

This page is an overview of the latest UI for the Workforce Management (WFM) Forecast, Performance, and Calendar modules (introduced in 8.5.2). If you are using the classic Supervisor interface and have landed on this page by accident, see the [Overview](#) page in the *Workforce Management Web for Supervisors Help (Classic)*, which describes all modules, including the [classic Forecast module](#), [classic Performance module](#) and [classic Calendar module](#).

The views and panes in the WFM Supervisor interface display some combination of the controls described below, depending upon selections that you make in the Objects pane.

Buttons and icons	The following buttons and icons appear at the WFM interface:
	<b>Log Out</b> closes WFM Web, without confirming your choice if there are no changes to save.
	<b>Option</b> menu enables you to select from a list of view-specific commands. This menu's contents change as you move among modules and views, and often match the command icons that appear on the toolbar.
	<b>Help</b> icon opens WFM Web Help at the view-level topic. For example, if you open <b>Forecast &gt; Scenarios</b> and click this icon, the Help topic opens, describing the <b>Scenarios</b> view.
	<b>Contextual Help</b> button opens WFM Web Help at the wizard or dialog topic. For example, if you click this button in a wizard or dialog, the Help topic opens, describing the wizard or dialog.
	<b>Search</b> icon enables you to enter search criteria to quickly find the object you are looking for. The criteria you enter will depend on which pane you have open. Result that are found to match the search criteria are highlighted.
	<b>Sort</b> button enables you to sort lists to easily find the items you are looking for. The sorting criteria will vary, depending on which pane you have open.
	<b>Date selectors</b> enable you to change the date or date range in a view. See more <a href="#">below</a> .
	<b>Paging controls</b> enable you to browse the previous and next pages or navigate to the first and last items in the data set (start and end of the

	list), by clicking the appropriate arrow button in the view. To navigate between pages, you can use the <b>Up</b> , <b>Down</b> , <b>Page Up</b> , and <b>Page Down</b> keys on the keyboard.
	<b>Rows per page selector</b> enables you to choose the number of table rows you want to see on a page. Use the drop-down menu to select 5, 25, 50, and 100 rows per page.
<b>Modules and Views</b>	<p>Click to open a drop-down list of views in the WFM module: <b>Forecast</b>. The views include:</p> <ul style="list-style-type: none"> <li>• <b>Forecast Scenarios</b></li> <li>• <b>Master Forecast &gt; Volumes</b></li> <li>• <b>Master Forecast &gt; Staffing</b></li> <li>• <b>Master Forecast &gt; Shrinkage</b></li> <li>• <b>Templates</b></li> <li>• <b>Overlays</b></li> </ul> <p>Click to open a drop-down list of views in the WFM module: <b>Performance</b>. The views include:</p> <ul style="list-style-type: none"> <li>• <b>Monitor</b></li> <li>• <b>Intra-Day</b></li> <li>• <b>Alerts</b></li> </ul> <p>Click to open a drop-down list of views in the WFM module: <b>Calendar</b>. The views include:</p> <ul style="list-style-type: none"> <li>• <b>Calendar Items</b></li> <li>• <b>Time-Off Limits</b></li> </ul>
<b>Actions Toolbar</b>	The buttons on the toolbar (often, not always) correspond to the commands on the <b>Option</b> menu. Hover your mouse pointer over a toolbar button to see a tool tip that displays the button's name. <a href="#">See an example.</a>
<b>Objects Pane</b>	<p>This pane offers several different display schemes, depending on the current selection of tab and menu item:</p> <p><b>Tabs:</b> module-specific item trees under separate tabs  One tree: <b>Business Units (BUs) &gt; Sites</b>  One tree: <b>BUs &gt; Sites &gt; Activities</b>  Upper tree: <b>BUs &gt; Sites &gt; Teams &gt; Agents</b>  Lower tree: <b>BUs &gt; Multi-site Activities &gt; Activity Groups &gt; Sites &gt; Activities</b></p> <p>When there are two selecting items in either of these two trees, it triggers an automatic selection of corresponding items in the other tree.</p> <p>At the site level, you may see a team in the tree labeled &lt;None&gt;. This node lists any agents that are assigned to the site,</p>

	<p>but not assigned to a team. If all agents in that site are assigned to a team, then the &lt;None&gt; team is empty. The only exceptions to this hierarchy are when <b>Scenarios</b> is selected or when you use the <b>Configuration</b> or <b>Reports</b> modules.</p> <p>Clicking an object in a tree (or clicking its <b>expand/collapse control</b>) displays the object's contents below it, indented slightly. When you have displayed the desired object, double-click it (or click it once, and then click <b>Get data</b>) to open the selected view for that object.</p> <p>Where the Objects tree displays check boxes, you can usually select / deselect multiple objects by selecting (  ) / clearing (  ) their check boxes, respectively. Certain views do not display check boxes; in this case, you can select multiple objects by clicking the group of objects while pressing the <b>SHIFT</b> or <b>CTRL</b> key. Some views and windows allow you to select only a single object.</p>
<b>Expand/Collapse Controls</b>	<p>Wherever you see the  icon in a tree or other control, you can click it to see an expanded view of the adjacent item's contents or details. The  icon indicates an expanded item. Click it once to collapse the item's contents and see more parallel items.</p>
<b>Action Buttons</b>	<p>View-level action buttons within the working pane provide controls that are specific to particular views (for example, apply or cancel).</p> <p>The <b>Get data</b> button  , when present at the lower left below the Objects tree, refreshes the display with current data from the database.</p> <div> <p><b>Tip</b></p> <p>Not all modules use the <b>Get data</b> button. If there is no <b>Get data</b> button, the view is automatically updated with the new data every time that you change your date or object selection.</p> </div>

## Date selectors

Many WFM Web modules and views have common date-selection controls to modify the date or date range displayed in them. Use these controls to:

- Select a **start date**.
- Jump to other dates by opening the **monthly calendar**.

Also, learn how WFM Web automatically selects the **first workday in weekly views**.

## Selecting the start date

Where available, the date-selection controls appear at the right-most end of the toolbar.

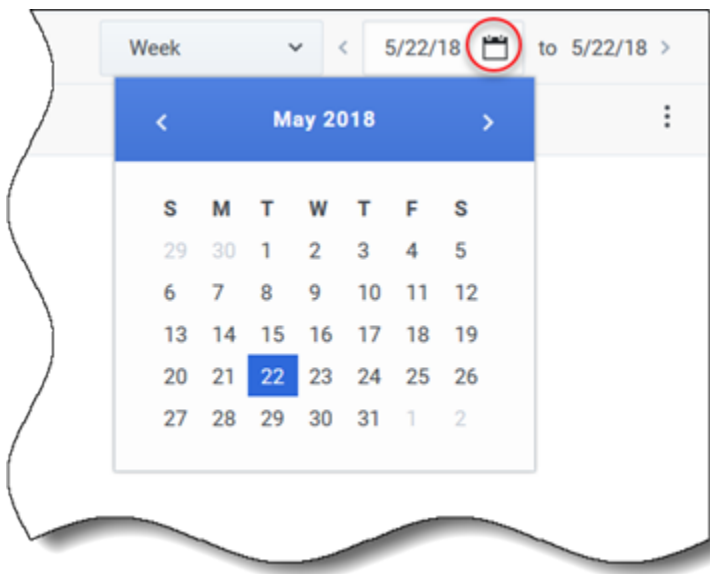


Use these controls as follows:

- Click the left angle bracket to move the start date back one interval (day, week, or schedule planning period—depending on the context), and the right angle bracket to move the start date forward one interval.
- Type a date into the date box or use the up and down arrows to edit the start date. (The sequence of month, day, and year digits depends on your operating system's regional settings.) See also, [weekly views](#).
- Click the Calendar icon to open the [monthly calendar](#).

Date selection controls include the end date in views that display information for more than one day, but you cannot modify it.

## Selecting the month



Clicking the Calendar icon opens the one-month calendar. You can use the calendar's controls to:

- Find the current start date—The currently-selected start date is indicated by a dark blue square.
- Select a new start date—Click a date to adjust the start date in the current module or view.
- Move forward or backward one month—Click the left or right arrows in the calendar header.

## Weekly views: automatic start day selection

In weekly views, if you enter a date other than the first weekday, the view automatically adjusts to start with the first weekday.

The first weekday is the one specified in **Week start day** in the **Business Units Properties** tab.