Workforce Management Supervisor Help

Logging in and out

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Contents

Logging in and out

> **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.

Before you can log in to WFM, you must have the WFM Web URL (address). In some contact centers, the Log in page might be set up and ready for you to enter your username and password. If this is not the case, ask your administrator for the WFM Web URL. After typing it into your browser, WFM displays the splash screen for the Log in user interface (UI).

> **Tip**
>
> WFM has a new Supervisor interface that you can access after logging in to Web for Supervisors (if you have the appropriate access rights). To use the new interface, see Opening the new Supervisor UI.

Logging in to WFM
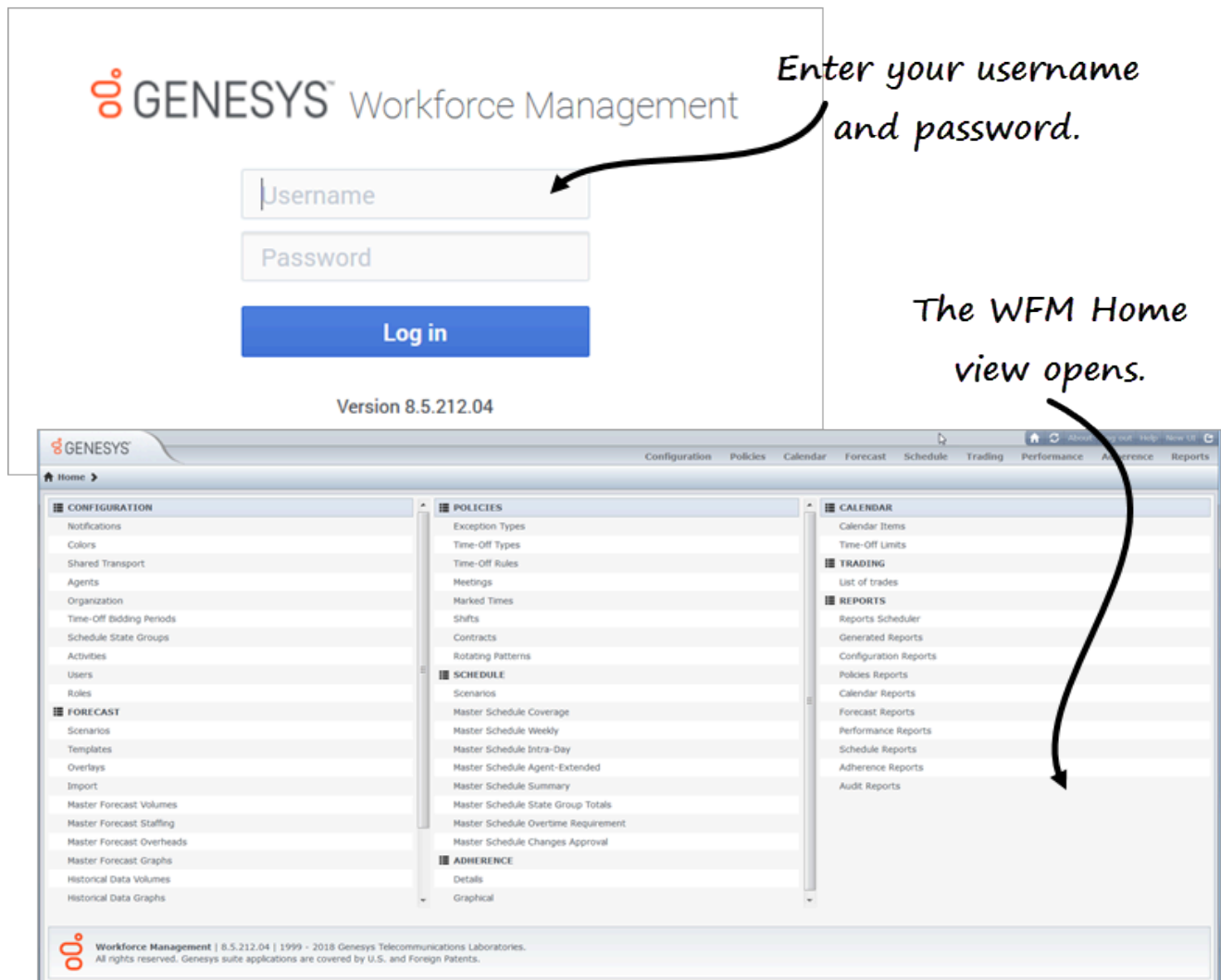
To start using WFM:

1. Obtain the URL (address) for the WFM application from your administrator.

2. Open a web browser.

3. Copy and paste or type the URL into your browser's address bar and press **Enter**.
   The Log in window appears.

4. Enter your user name and password.

5. Click **OK**.

If WFM Web validates your user name and password, the Supervisors (Classic) **Home** view opens. If WFM cannot log you in, it displays an error message indicating the problem. Either click **Login** to try again (for example, if you think that you typed an incorrect user name or password), or click **Show**

error details.

> **Important**
>
> When using the Firefox web browser, ensure multiple supervisors are not logged in to the same host at the same time.

Opening the latest Forecast UI

Depending on how WFM Web is set up in your contact center, you might or might not see the option to open the New UI. If you do not see this option and require access permission, contact your administrator.

Click "New UI".

Click "Forecast to select and open views in the Forecast module.
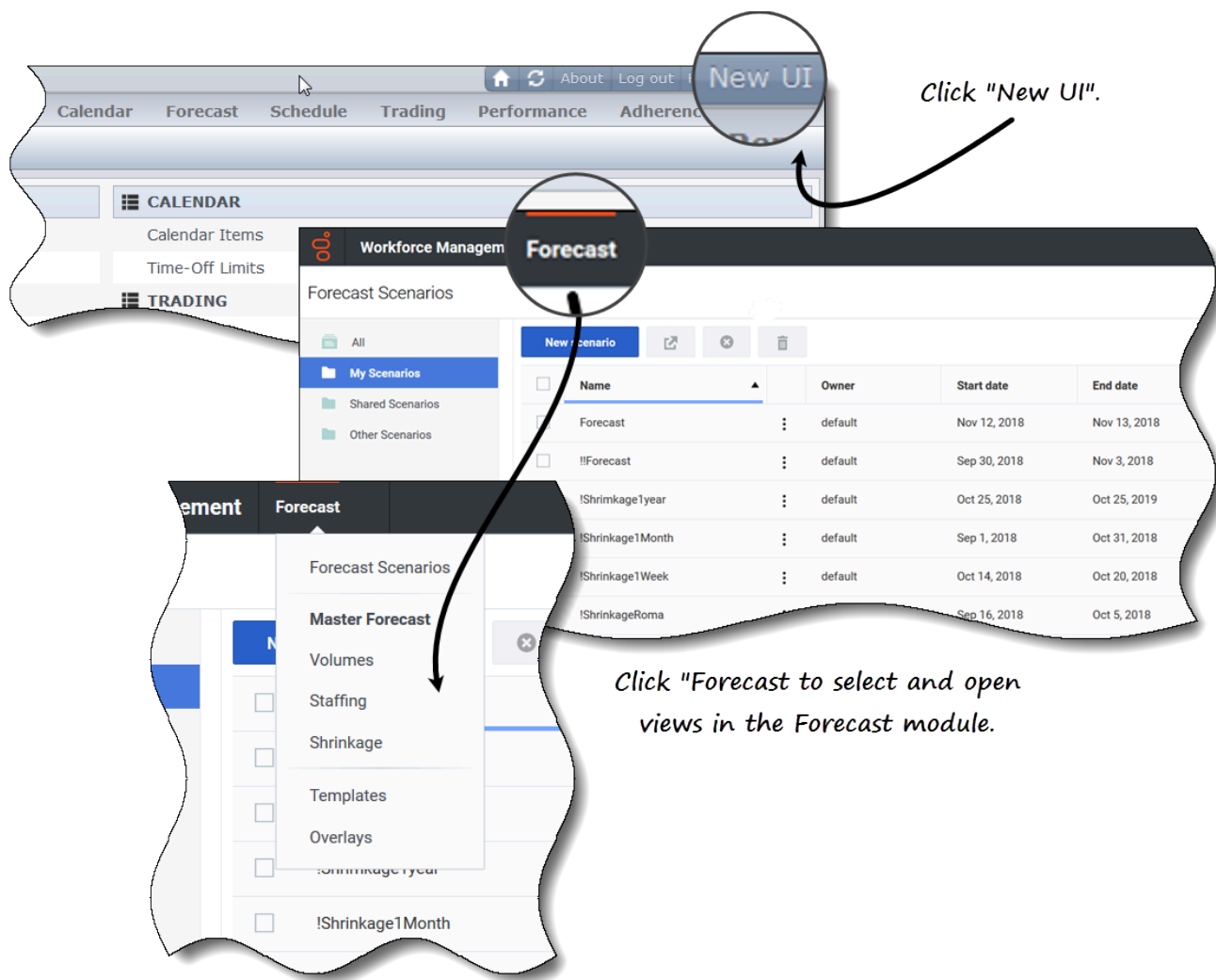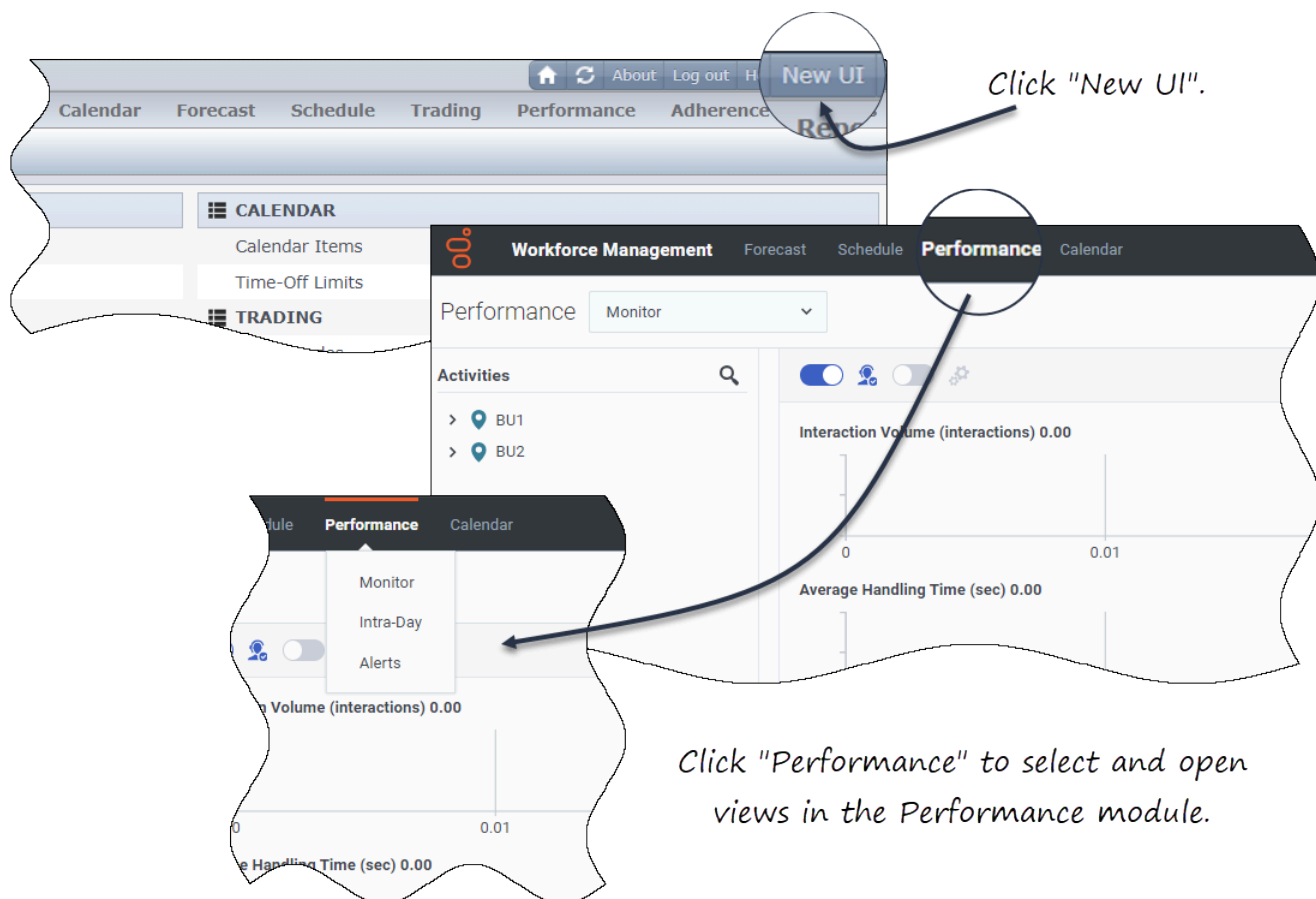
To open the new Forecast UI:

1. First, log in to the Supervisors (Classic) interface. See the procedure above.

2. In the top-right corner of the classic **Home** view (or any view), click **New UI**.
   The new UI for all available modules are displayed.

3. Click the **Forecast** drop-down menu to select and open any view in the **Forecast** module.

Tip

You can switch to the classic Supervisor UI at anytime by clicking the **Log in**/**Log out** drop-down menu and selecting **Switch to classic UI**.

Opening the latest Performance UI

Depending on how WFM Web is set up in your contact center, you might or might not see the option to open the New UI. If you do not see this option and require access permission, contact your administrator.

Click "New UI".

Click "Performance" to select and open views in the Performance module.

To open the new Performance UI:

1. First, log in to the Supervisors (Classic) interface. See the procedure above.
2. In the top-right corner of the classic **Home** view (or any view), click **New UI**.
   The new UI for all available modules are displayed.
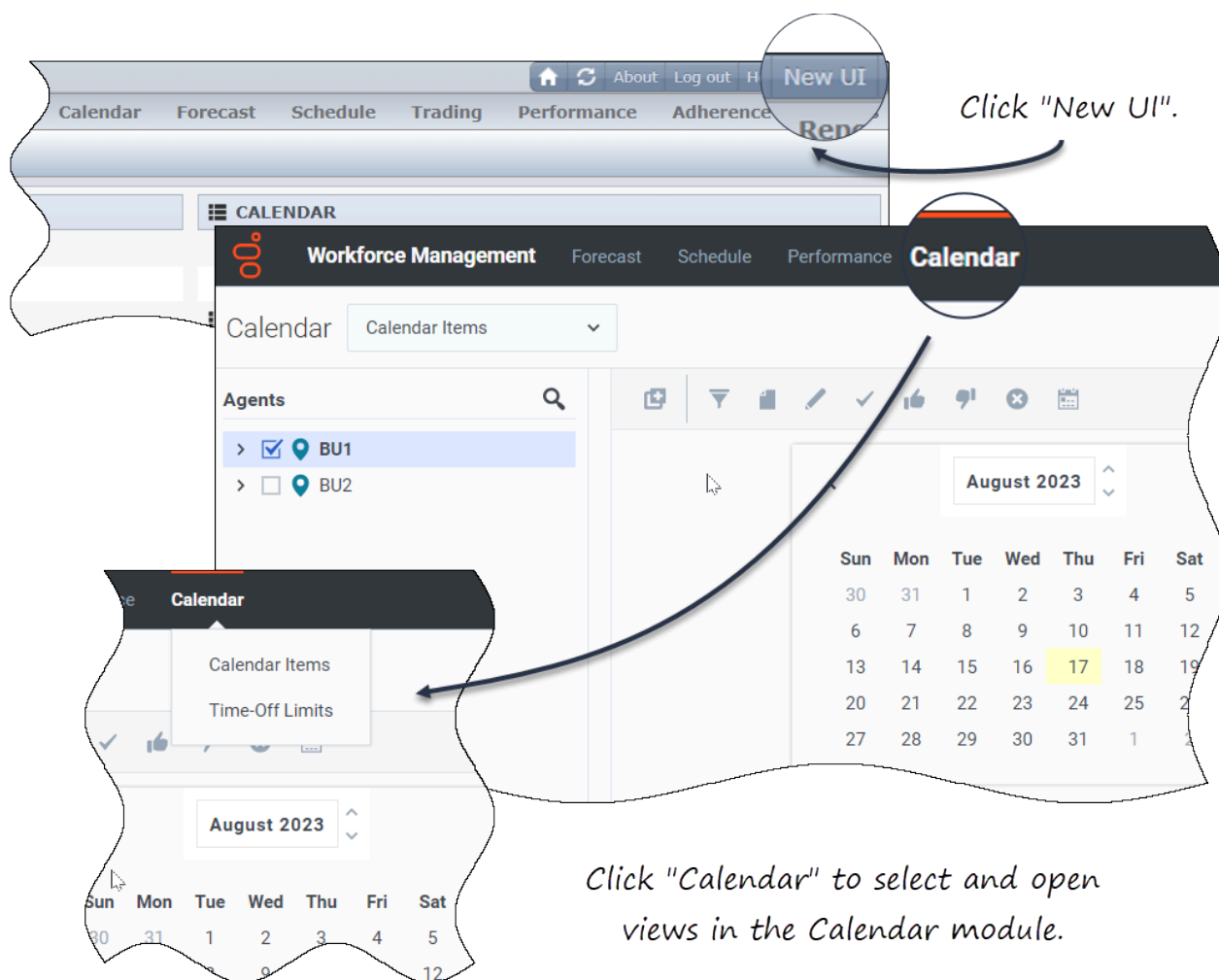3. Click the **Performance** drop-down menu to select and open any view in the **Performance** module.

> ### Tip
> You can switch to the classic Supervisor UI at anytime by clicking the **Log in**/**Log out**

drop-down menu and selecting **Switch to classic UI**.

Opening the latest Calendar UI

Depending on how WFM Web is set up in your contact center, you might or might not see the option to open the New UI. If you do not see this option and require access permission, contact your administrator.

Click "New UI".

Click "Calendar" to select and open views in the Calendar module.

To open the new Calendar UI:

1. First, log in to the Supervisors (Classic) interface. See the procedure .

2. In the top-right corner of the classic **Home** view (or any view), click **New UI**.
   The new UI for all available modules are displayed.

3. Click the **Calendar** drop-down menu to select and open any view in the **Calendar** module.

Tip

You can switch to the classic Supervisor UI at anytime by clicking the **Log in**/**Log out** drop-down menu and selecting **Switch to classic UI**.

Changing the local timezone

WFM enables you to view your user settings and change your timezone in the **User Settings** dialog by clicking the **Log in**/**Log out** drop down menu.
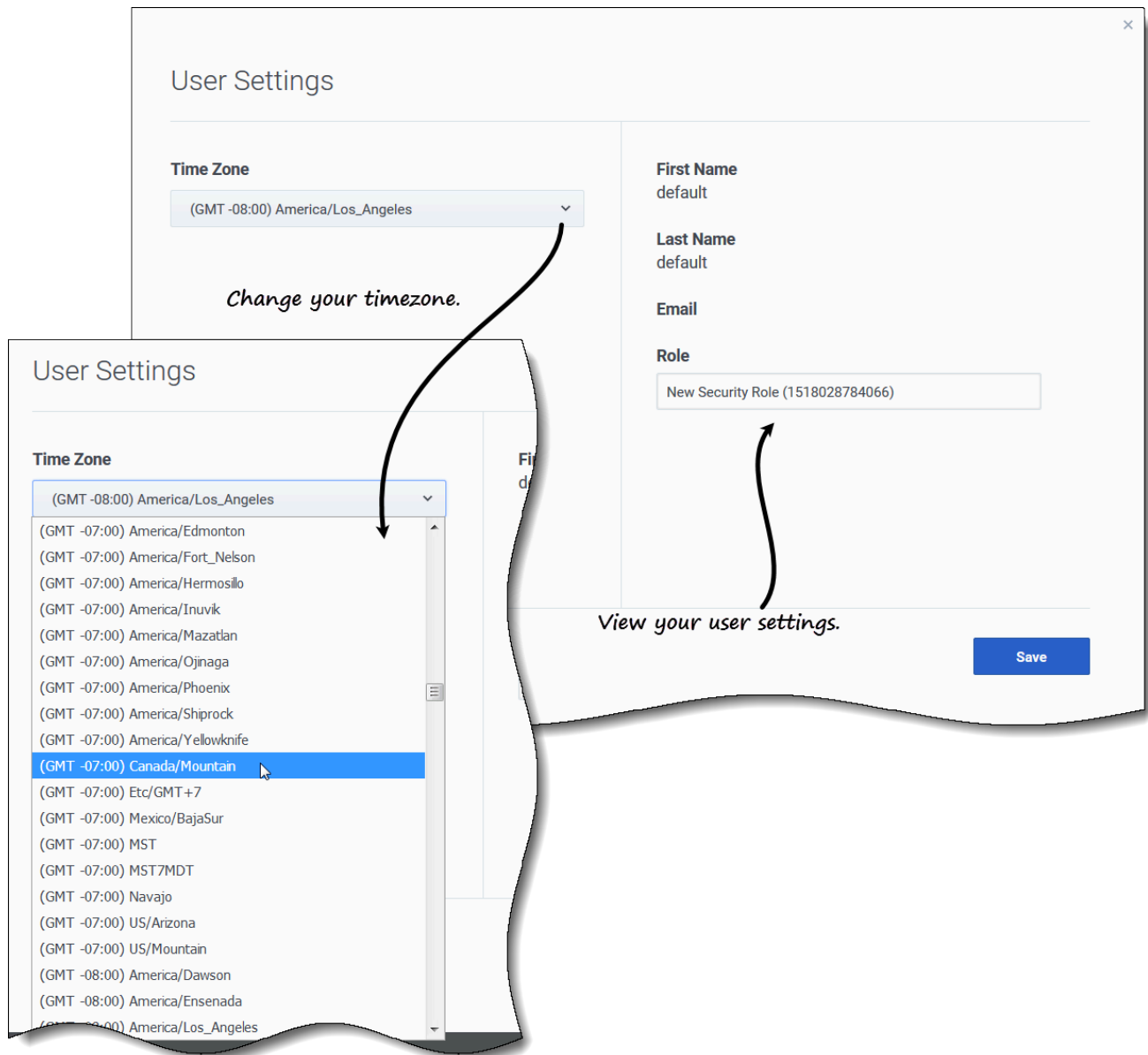
To change your timezone:

1. In the upper-right corner of any view, click the down arrow beside your username.

2. Select **User settings...**
   The User Settings dialog opens.

3. Click the **Time Zone** drop-down menu and select your timezone.

4. Click **Save**.

You can also view your first name, last name, email address, and WFM security role in this dialog,

although you cannot change these settings.

Logging out

Always log out when you have finished using WFM. If you do not log out, other users of your workstation might be able to view your account information.
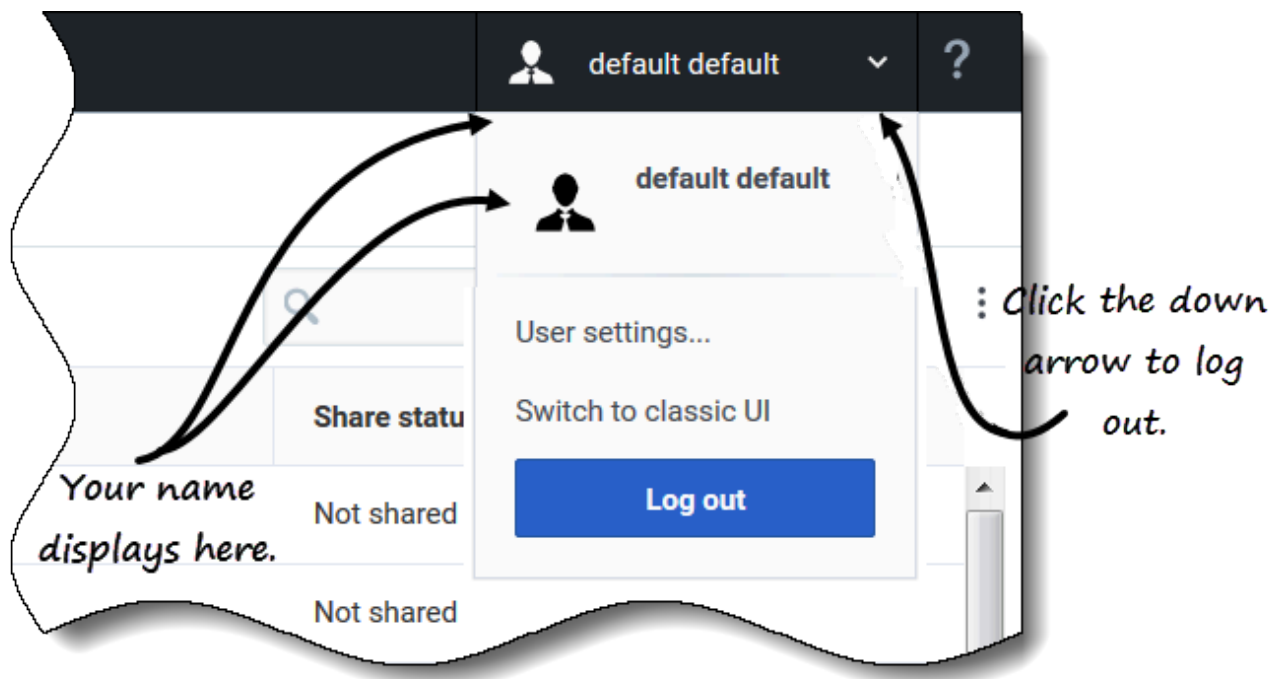
To log out of WFM:

1. Click the down arrow beside your name to open the drop-down menu.
2. Select **Log out**.
   WFM Web logs you out and the Login screen appears.

Another user can now log in or you can close the browser.