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# Workforce Management Web for Supervisors Help

[Overview](#)

# Overview

This Help provides a comprehensive guide to the features and functions of the Workforce Management (WFM) Web for Supervisors (Classic) interface. In addition, it offers some general guidance on using web browsers. If you require more assistance on using your web browser, refer to the browser's help system.

## Tip

WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see [Workforce Management Supervisor Help](#), which describes the new [Forecast module](#).

## Supervisors Help Options

The red underlined links below will take you directly to a topic. Links are available throughout Supervisors Help to give you easy access to information.

<a href="#">Getting Started</a>	Explains how to perform WFM Web basics such as logging in and out, choosing dates, and navigating through WFM Web.
<a href="#">Policies Module</a>	Explains how to configure the following Policy objects (rules that WFM considers when making forecasts and setting up schedules): <b>Exception Types, Time-Off Types, Time-Off Rules, Meetings, Marked Time, Shifts, Contracts, and Rotating Patterns</b> .
<a href="#">Configuration Module</a>	<p>Explains how to:</p> <ul style="list-style-type: none"><li>• Configure WFM to send email notifications when the following types of events occur: Schedule modifications (agent notifications), changes in the status of schedule trade requests (user and agent notifications), and changes in the status of time-off requests (user and agent notifications).</li><li>• Use the <b>Colors</b> module to configure the colors that WFM uses in the Supervisor schedule views. You can configure default values for these schedule items: <b>Work, Days Off, Meals, Breaks, Activity Sets, Exceptions, Time Off, and Marked Time</b>. You can also configure specific colors, by site, for different types of: <b>Activity Sets, Exceptions, Time Off, and</b></li></ul>

	<p><b>Marked Time.</b></p> <ul style="list-style-type: none"><li>• View, create, update, delete, and manage <b>Shared Transport Groups</b>.</li><li>• Configure Agent properties <b>Activities</b>, <b>Time Off</b>, <b>Time-Off Bonuses</b>, and assign <b>Time-Off Rules</b>, <b>Time-Off Types</b>, <b>Contracts</b> or <b>Rotating Patterns</b> to them.</li><li>• Configure <b>Business Units</b> and <b>Sites</b>.</li><li>• Configure <b>Time-Off Bidding Periods</b>.</li><li>• Configure <b>Schedule State Groups</b> and <b>Adherence Rules</b></li><li>• Configure <b>Activities</b></li><li>• Configure <b>Users</b> (supervisors and other persons who are not agents)</li><li>• Configure <b>Roles</b> (security roles and privileges)</li></ul>
Calendar Module	Explains how to view, add, edit, and delete preplanned items, such as exceptions and preferences; how to grant or decline these items; and how to set time-off limits.
Forecast Module	Explains how to make workload and staffing predictions for one or more sites.
Schedule Module	<p>Explains the schedule views and how to make real-time adjustments to the schedule. Includes these bidding views:</p> <ul style="list-style-type: none"><li>• <b>Overtime Bidding View</b>—Explains the overtime bidding process, including: creating an overtime offer, bidding by agents, bid resolution and publishing to the <b>Master Schedule</b>.</li><li>• <b>Schedule Bidding View</b>—Explains the schedule bidding process, including: creating a scenario, bidding by agents, bid resolution and publishing to the <b>Master Schedule</b>.</li></ul>
Trading Module	Explains how to review, and approve or decline, agents' proposed schedule trades.
Performance Module	Explains how to view actual site performance compared with planned performance, using such key indicators as Service Level and Average Speed of Answer (ASA).
Adherence Module	Explains the real-time agent adherence views, which include both table and graph options.
Reports Module	Lists all of the reports available in WFM Web for Supervisors, and details the information included in each report.
About Window	Displays the release number and copyright

information for this release of WFM Web.

## Printing This Online Help

If you prefer to print the Help rather than use it online, complete the following steps:

1. In the **Navigation** pane on this page, at the bottom of the **Table of Contents**, click **PDF Version**.
2. When the dialog opens, select:
  - **Open with** to select the application, with which you want to view and print the Help.  
**Adobe Acrobat v9 is recommended.**
  - **Save File** to save the Help to a folder on your computer.  
**When the download is complete, navigate to the folder that contains the saved .pdf file, open and view the file on your computer offline.**
3. Use the Print function in your application to print the document.