CommunityWFM
A RingCentral company

Application Menu Administration

Webinar handout
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About this document

This document accompanies the CommunityWFM College webinar Application Menu Administration. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

The application menus are typically configured during your onboarding training. This document is intended to guide you if you need to make adjustments to the menu configuration for different roles.

What are application menus?

Application menus determine the visibility of menu items in WFM. Each role (agent, supervisor, scheduler, administrator) can have different views and access to different menu items.

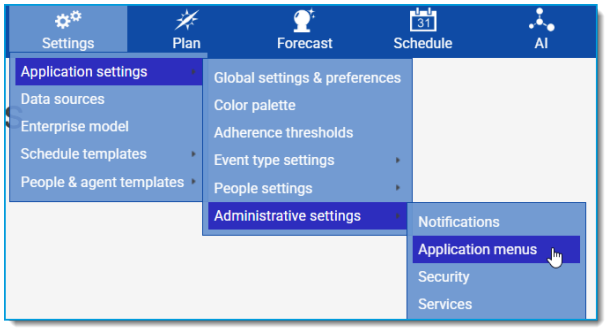
Agents see menu options for Today with a calendar option; Plan – for time off requests; Schedule – to view published schedules, ASAPs, partitions, self-service requests and more; Properties - to set up devices and change their password; Reports – but only Published Schedule and Schedule Adherence; and Help with appropriate videos.

Supervisors typically see Today – with calendar view, Send a message, and Impersonate supervisor, giving them the ability to run reports as other supervisors; Plan – to view schedule transactions and auto-approve rules; Properties, if your center will be using the mobile app for supervisors; Reports; and Help.

Schedulers and administrators see most of the menu items, allowing the ability to forecast, schedule, run reports, and customize WFM.

View current menu selections

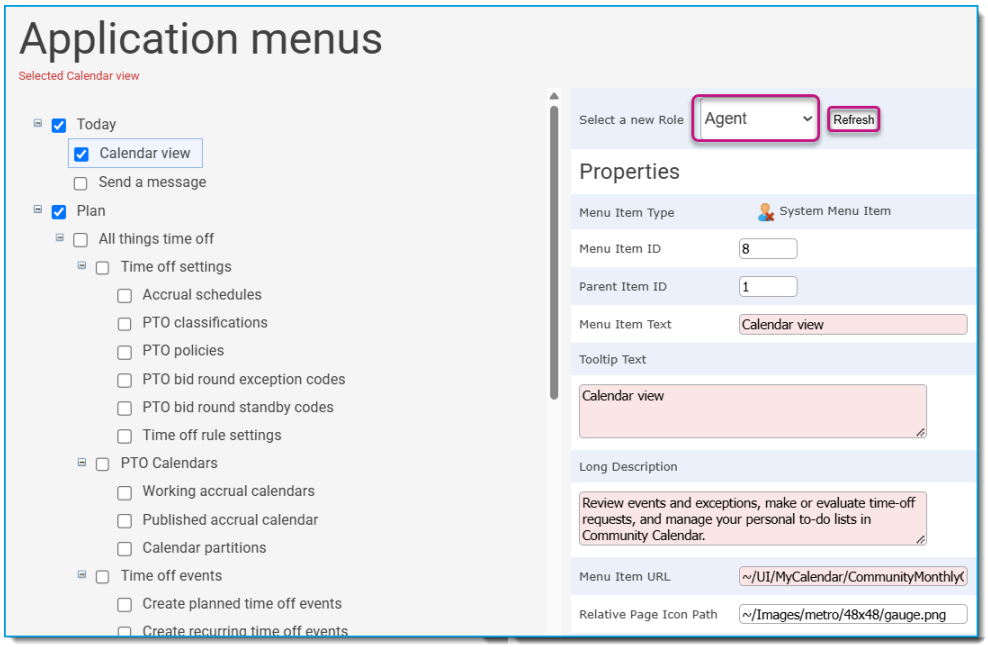
To view and customize the menus, navigate to Settings > Application settings > Administrative settings > Application menus.



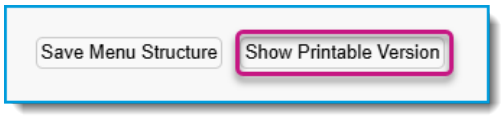
The left side shows all the available menu items with check marks for the current selections for the role identified at the top right of the screen.

The right side includes the selected role, menu text, descriptions, and other details.

To view or edit selections for a different role, select the role from the drop-down box on the upper right then click *Refresh*.



To view **all** roles and their current selections, click *Show printable Version* at the bottom of the screen.



Note: With this printable report version, you can check and uncheck boxes, but these settings **are not** saved.

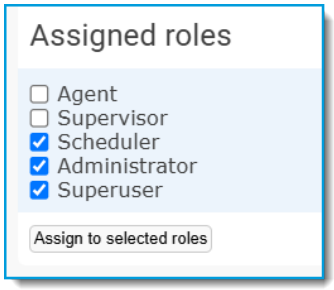
Edit menu items for a role

To change which menu items are visible to a role, select the role from the drop-down menu on the right-hand side then click *Refresh.*

Check or uncheck the menu items on the left to add or remove them. **Read the descriptions carefully!** Some menu items have similar names but different functions. And there are items with duplicate names but one is for agents and one is for administrators (e.g., ASAP calendar, Published schedule).

When finished, click *Save Menu Structure* at the bottom of the list.

Edit roles for menu items



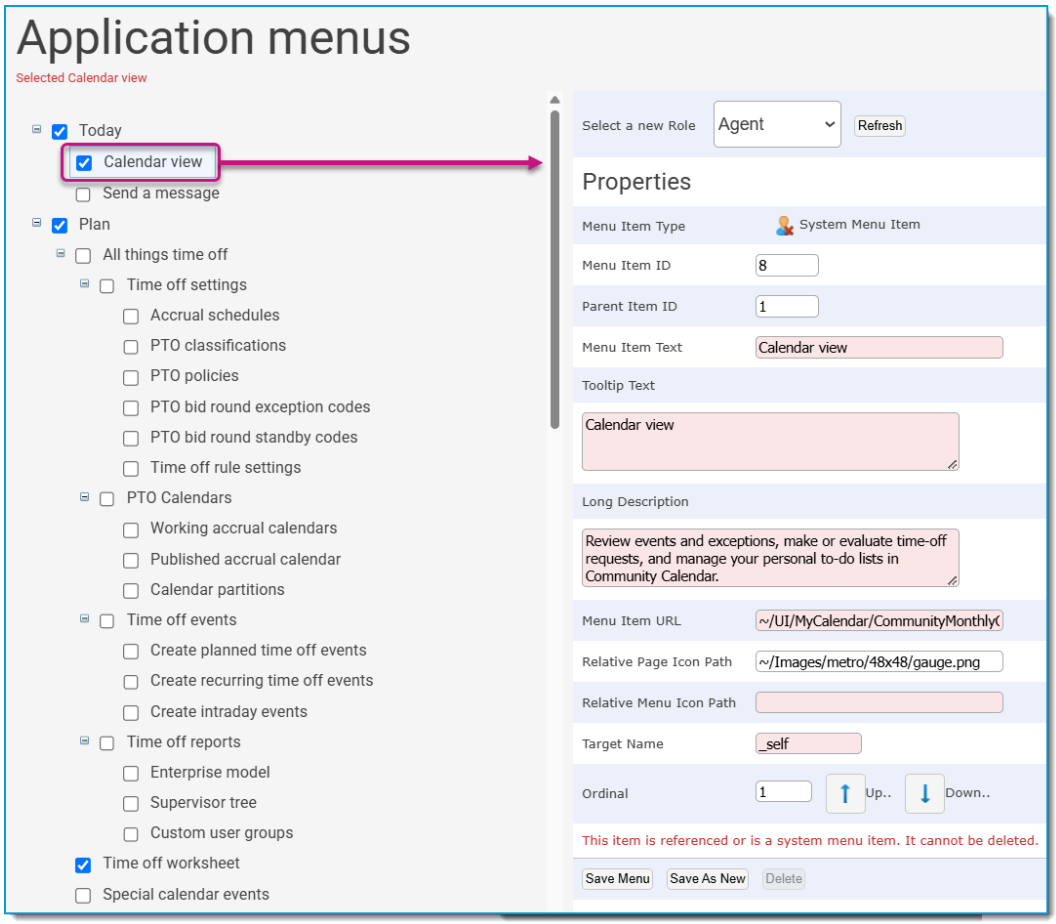
Click on the **text** of the menu item on the left to populate the Properties in the panel on the right. At the bottom of the panel, check or uncheck the *Assigned roles* to add or remove the menu item for that role. When finished, click *Assign to selected roles* to save your changes.

Edit the menu text or location

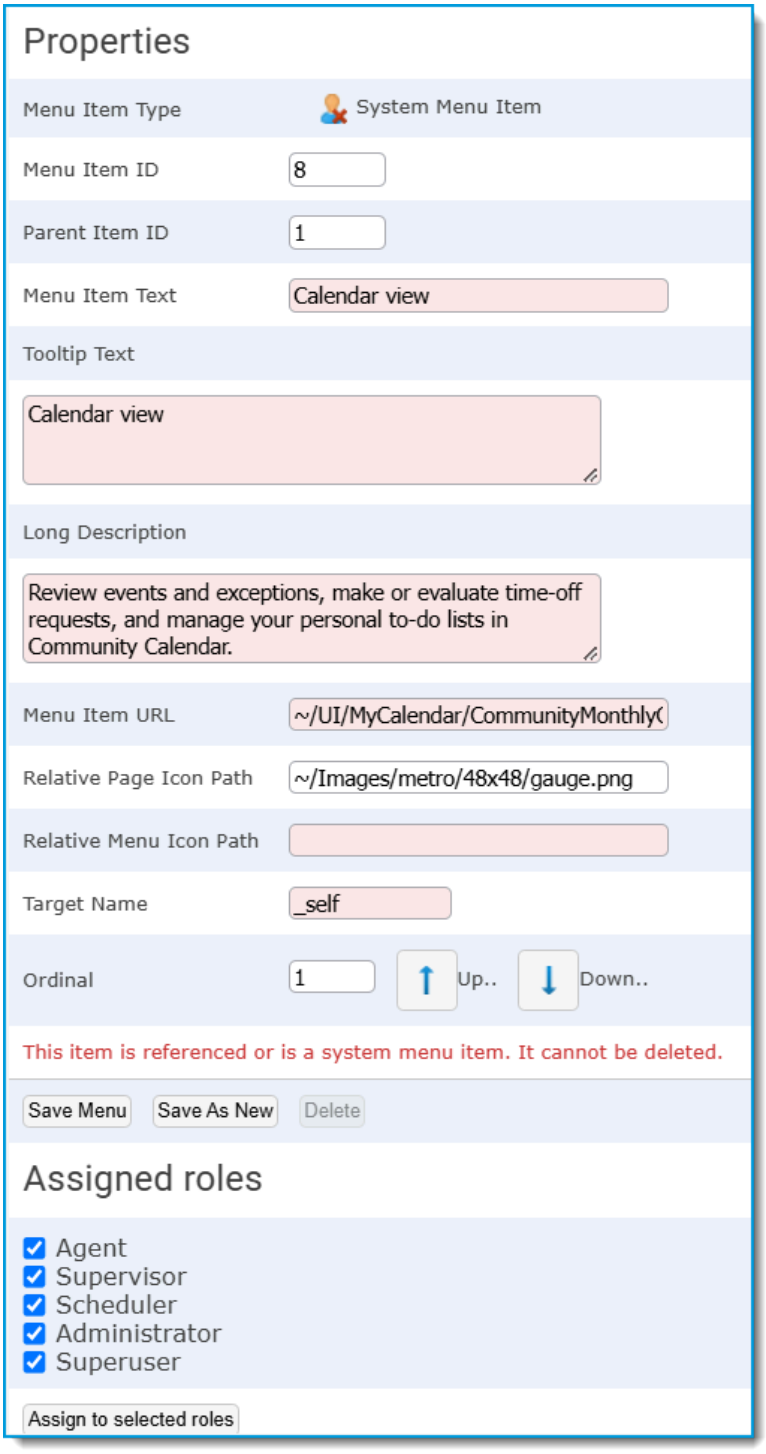
Note: Consider printing or taking a snapshot of existing text and structure prior to making any changes. Once changed, there is no "reset to default" button for the menu structure/text.

Click the text of the menu item you wish to change. The properties of the menu item will populate in the right-side panel.

Note: We do not recommend changing the Menu Item Text or location of the menu items. If changed, it may be harder to receive WFM support when the names no longer match, and the training/help videos will not be accurate if people try to follow along.



Edit the menu properties



Menu Item Type: These are system menus.

Menu Item ID: Refers to internal location. You cannot edit this field.

Parent Item ID: Refers to internal location. You cannot edit this field.

Menu Item Text: Text that appears in the menu.

Tooltip Text: Text that appears on the screen when hovering over the link to the menu item.

Long description: For reference. This text is not visible in the application.

Menu Item URL: Refers to internal location.

Relative Page Icon Path: Icon page location.

Relative Menu Icon Path: Icon path.

Target Name: Internal reference.

Ordinal: Location of this item in the list of menu items. 1 = at the top. Click the up or down arrow to move the item. You will see the change in the menu structure on the left.

If you make changes to the menu, you can save it as a new menu or save over the existing menu. You cannot delete system menu items.

Assigned roles: Refers to who will see this menu item. If you make changes, click *Assign to selected roles.* You may need to log out and log back in to see the changes.

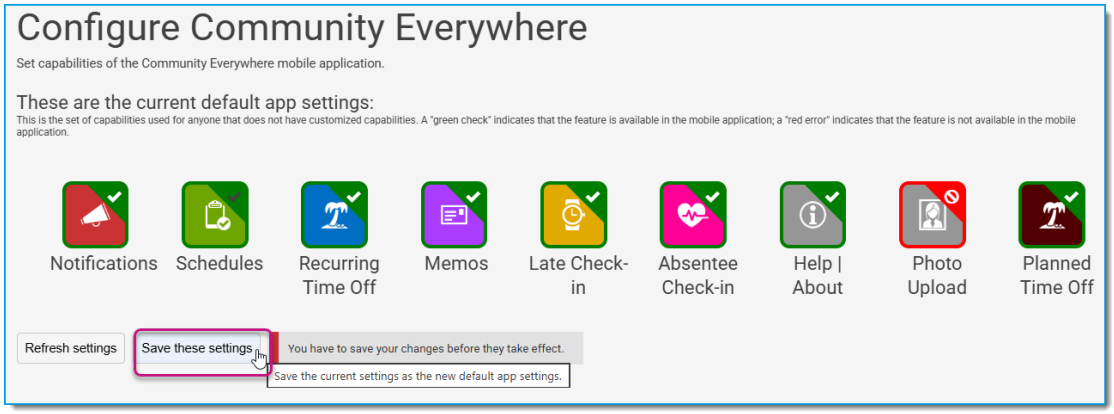
Mobile Application Menu

Administrators can set up the mobile application menu items for all or for individuals.

Settings > Application settings > Administrative settings > Mobile application setup.

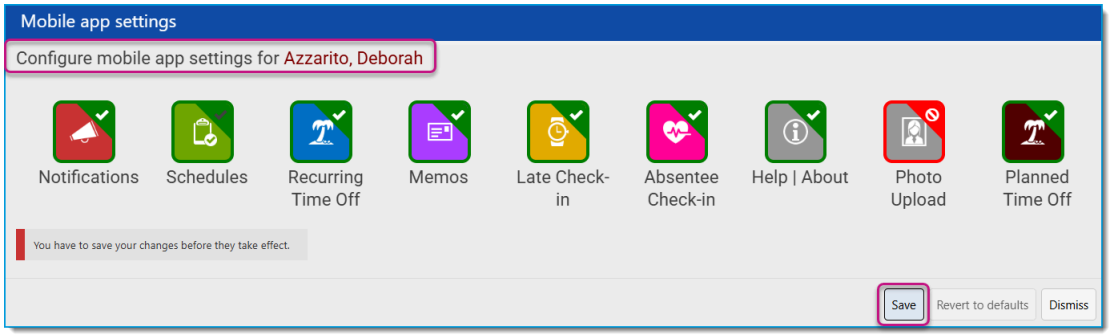
Customize settings for all

You can remove menu items for everyone by clicking on the tile, then clicking *Save these settings.*



Customize settings for an agent

1. Select the agent picture to open the Mobile app settings pop-up.
2. Check or uncheck the tiles then click *Save.*



Suggested roles for menu options

Menu title	Purpose	Recommended role(s)
Today	Provides a comprehensive view of contact center operations and functions as the universal refresh/return to homepage button.	All
Calendar view	View personal **published** schedule by day or month.	Agent
Impersonate supervisors	Allows supervisors to see each other's teams (*by default - only if the supervisor is logged out. Can be changed in global settings).	Supervisor
Send a message	Send an ad-hoc message using one or more notification channels to a customized set of recipients.	Supervisor and above
Settings	Configure and customize the parameters of the WFM application.	Scheduler and above
Application settings	Setup parameters necessary for the rest of the application to function.	Scheduler and above
Global settings and preferences	Globally applied settings that govern the permissions for application roles and behaviors of multiple automated procedures and system wide defaults.	Administrator
Color palette	Expand the built-in color palette by adding custom colors to use in event type setup, device state definition, and adherence mapping.	Scheduler and above
Adherence thresholds	Controls when an agent will "show" as out of adherence and allows stacking multiple tiers based on duration out of adherence.	Scheduler and above

Menu title	Purpose	Recommended role(s)
Event type settings	Configure events and behaviors	Scheduler and above
Event priorities	Dictates the stacking order of events in a schedule. Higher priority Items are more visible on a schedule and will override “lesser” events.	Scheduler and above
Event types	Items added to schedules for clarity and shrinkage tracking (e.g., Breaks, Lunch, Meetings/Trainings)	Scheduler and above
People settings	Governs custom settings for user profiles and grouping.	Scheduler and above
Custom properties for people	Create custom fields on user profiles to house additional information. Can also use for sorting when pulling schedules/adherence.	Scheduler and above
Custom user groups	Allows creating groups for use in reporting or for sorting users into categories not already defined by supervisor or enterprise model. Can also use for security setup.	Scheduler and above
Employee classifications	Can use to filter reports. Can assign only one classification per user.	Scheduler and above
Ranking profiles	Create stacked rankings to use in time off, shift bidding, preference-based scheduling, and ASAPS	Scheduler and above
Agent RAP reason codes	Customize the list of reason codes assigned to agents in restricted action plans (RAPs).	Scheduler and above
Administrative settings	Configure services, notification channels, application menus, and other core-level system settings.	Administrator

Menu title	Purpose	Recommended role(s)
Notifications	Modify the notification channels and text associated with key events within the system.	Administrator
Application menus	Modifies the default menu setup to match client preferences.	Administrator
Security	Manage security settings when using securities to limit access. Allows for all securities to be wiped out if a user locks themselves out of needed resources.	Administrator
Services	Allows for confirmation and/or customization of running/existing back-end processes.	Administrator
Data retention policy	Allows customizing the data retention policies for the data warehoused by the system.	Administrator
Mobile application setup	Allows modifying the mobile application at the end user level to enable or disable access to features.	Administrator
Data summary utility	Trigger the adherence summary process by entering a date range.	Administrator
Data sources	Configure the system by importing/defining collection points, device states, and historical contact volume and handle time. Can also modify system connection information and historical data.	Administrator
Enterprise model	Create the backbone of the system. Used to determine how the company sees their business for forecasting, scheduling, and reporting.	Scheduler and above
Schedule templates	Contains the system options to build, maintain, and assign user schedules.	Scheduler and above

Menu title	Purpose	Recommended role(s)
Break sets	Allows creation of rules that govern what events appear on a schedule based on schedule length and event grouping.	Scheduler and above
Schedule templates	Build/modify user schedules.	Scheduler and above
Assignments	Assign agents to schedule template.	Scheduler and above
Assignment profiles	Create a box that houses specific schedule templates that can be bulk assigned based on users, or used in scheduling and “what-if” models.	Scheduler and above
People & agent templates	Houses controls for managing or modifying user profiles.	Scheduler and above
People	Allows manually creating new users, importing from the ACD, or importing via Excel. Also allows for sorting user profiles via multiple channels (Enterprise model, org chart, custom user group, or classifications).	Scheduler and above
New person	Manually create a new user profile.	Scheduler and above
Current list	All active users defined (can also be filtered to show deactivated agents by choosing advanced list options). Can also create or import additional users.	Scheduler and above
Agent templates	Create simulated agent profiles.	Scheduler and above
Synchronize people	Tools for synchronizing agent profile properties.	Scheduler and above
Synchronize people now	Bulk edit tool that allows apples to apples changes to user profiles (work type, time zone,	Scheduler and above

Menu title	Purpose	Recommended role(s)
	assigned supervisor, skills, schedule templates).	
Synchronization templates	Set up a follow-the-leader list that allows defining a source that if changes are made to that profile or agent template, will apply to all users set up to follow the source.	Scheduler and above
Data source logins	Shows defined agents and sorts by data source login status (none, no default defined, and default defined); will also show employee ID (if defined), hire date, and title.	Scheduler and above
Cross training analysis	Shows a breakdown of Activities and assigned users along with cluster information (clusters = unique groupings of agents).	Scheduler and above
Device setup report	A full list of all external devices set up for each person in the application.	Scheduler and above
Photo queue	Allows for approval or denial of uploaded agent photos.	Scheduler and above
Plan	Houses tools used for time off/event creation and reporting.	All users
All things time off	Configure time off settings, calendars, add time off requests and run reports.	Scheduler and above
Time off settings	Configure all of the setup options related to time off, accruals, and calendar partitions.	Scheduler and above
Accrual schedules	Set up accrual schedules based on years of service.	Scheduler and above
PTO Classifications	Group event types into PTO classifications to better manage time off accruals.	Scheduler and above

Menu title	Purpose	Recommended role(s)
PTO policies	Establish accrual rules and assign participants to PTO policies.	Scheduler and above
PTO bid round exception codes	Create custom reason codes used to grant PTO bid round participants exceptions to various PTO rules.	Scheduler and above
PTO bid round standby codes	Create custom reason codes for bid round participants in standby mode.	Scheduler and above
Time off rule settings	Customize the list of time-off rules used to evaluate time off requests.	Scheduler and above
PTO calendars	Build and maintain your working accrual calendar, published accrual calendar, and calendar partitions.	Scheduler and above
Working accrual calendars	Set up as many working accrual calendars as you need to prepare accrual schedules.	Scheduler and above
Published accrual calendar	Review and edit the published accrual calendar showing accrual transactions, withdrawals, rollovers, and PTO balances.	Scheduler and above
Calendar partitions	Establish time off rules, bidding rules, and manage the time off bidding process.	Scheduler and above
Time off events	Create new planned time off requests, long-term requests, and intraday time away events.	Scheduler and above
Create planned time off events	Create new time off requests on behalf of your people.	Scheduler and above

Menu title	Purpose	Recommended role(s)
Create recurring time off events	Create recurring events on behalf of your people.	Scheduler and above
Create intraday events	Add time away events for your people for a single date.	Scheduler and above
Time off reports	Review events from the published schedule, and update the review status for qualified events.	Scheduler and above
Time off worksheet	Review time off settings, upcoming PTO, and PTO calendar settings	Agent
Schedule transactions	Review, approve, deny, and execute agent schedule transactions, including shift swaps, giveaways, and additional hours transactions.	Supervisor and above
Auto-approve service	Houses the configuration tools for setting up the Auto Approve functionality.	Scheduler and above
Rules	Specify the AutoApprove rules to apply to agents in your organization.	Scheduler and above
Current rules report	Displays a report containing all AutoApprove rules currently established for all activities or supervisor teams.	Scheduler and above
Special calendar events	Manage the list of special calendar events in your organization.	Scheduler and above
Self-service Validation Plans	Show the list of existing self-service kiosk validation plans.	Scheduler and above
Time off requests	Create new time off requests, long-term requests, and run time off reports.	Agent

Menu title	Purpose	Recommended role(s)
Request planned time off events	Create new planned time off requests.	Agent
Request recurring time off events	Create long-term recurring events for family leave, military leave, etc.	Agent
Forecast	Houses the tools to create/modify a forecast.	Scheduler and above
Forecast profiles	Provide the source for forecast data. Defines where data is housed that you want to use in forecasting.	Scheduler and above
Working forecasts	Forecasts that are in the "working" stage. These forecasts are not published and will not be used as the default source of data in scheduling or reporting.	Scheduler and above
Published forecast	The official forecast for the organization used as the default source of predicted data in reporting and schedule generation.	Scheduler and above
Staffing worksheet	Erlang Calculator. Run staffing scenarios based on simulated volume, handle time, and service targets.	Scheduler and above
Schedule	Houses the options to create, maintain, and consume schedules	All users
Working schedules	Used to create and modify user schedules before publishing; can also be used for 'what-if' schedules based on any defined forecast and/or agent schedule assignments.	Scheduler and above
Published schedule	View your schedule for this week or for a user-defined date range.	Agent

Menu title	Purpose	Recommended role(s)
Schedule bids	Allow the agent community to bid on selected schedules imported from the scheduling engine or manually created by bid administrators.	Scheduler and above
Schedule partitions	Set up schedule partitions, and review the progress of partition selections	Scheduler and above
Schedule partitions	Claim your own shifts from the active schedule partitions.	Agent
Published schedule	Manage and report on published agent schedules.	Scheduler and above
ASAP calendar	Quickly make changes to the published schedule with the handy ASAP tools.	Scheduler and above
Schedule availability	View your current availability or submit a new availability request for review. *Often removed if users aren't allowed to make these requests*	Agent (if being used)
Schedule preferences	Identify your preferred start time and day of week work pattern preferences. *Often removed if users aren't allowed to make these requests or are using fixed schedules.*	Agent (if being used)
Start time preferences	View your current start time preferences or submit new start times for consideration.	Agent (if being used)
Schedule day preferences	Provide schedulers your preferred days of week to work and values for other scheduling rules.	Agent (if being used)
Schedule template assignments	View your current schedule assignments or submit new assignment requests for consideration.	Agent (if being used)

Menu title	Purpose	Recommended role(s)
Schedule transactions	Request and review outstanding shift swaps, shift giveaways and shift take-aways.	Agent (if being used)
Schedules for your supervisor group	See all schedules for members of your supervisor team.	Agent
Self check-in	Alert your supervisors that you are present for your shift.	Agent
ASAP calendar	Show eligible ASAP items that user could participate in voluntarily and plan status.	Agent
Schedule bids	Show the list of current schedule bids.	Agent
Self-service request	Make a self-service request for off-device time.	Agent
AI	AI and Machine Learning tools	Scheduler and above
Automated forecasting	Create and maintain automated forecasts using machine learning and historical contact volume & handle time.	Scheduler and above
Anomaly detection	Configure the AI anomaly detection service, and view detected anomalies.	Scheduler and above
Activity anomaly detection hub	Configure and view AI anomaly detection by activity.	Scheduler and above
Anomaly detection profiles	Configure and view AI anomaly detection profiles.	Scheduler and above
Anomaly detection run now	Run and view AI anomaly detection.	Scheduler and above

Menu title	Purpose	Recommended role(s)
Properties	Review your agent profile properties as entered by the system administrators.	Agent & supervisor, or all users if using mobile app
Devices	Define notification channels including email and text.	Agent & supervisor, or all users if using mobile app
Profile pictures	Pick your profile picture.	Agent & supervisor
Report	Generate reports from WFM data.	All users
Contact volume	Review the historical contact volume reports using data retrieved directly from your ACD or other device.	Supervisor and above
Enterprise model	Review your contact volume history by selecting from the enterprise model tree.	Supervisor and above
Data source	Review your contact volume using your data source and collection points as criteria.	Supervisor and above
Published forecast	Reports from the Published Forecast.	Supervisor and above
Contact volume & handle time	Review your published contact volume and handle time forecast using the enterprise model.	Supervisor and above
Service targets	Review your published service objective forecast using the enterprise model. *Often removed completely if not doing variable service forecasting*	Supervisor and above
Shrinkage percentages	Review your published shrinkage percentage using the enterprise model.	Supervisor and above

Menu title	Purpose	Recommended role(s)
Staffing requirements	Review your published staffing requirements using the enterprise model.	Supervisor and above
Published schedule	Reports schedule, summary, and analysis data from the published schedule.	All users
Schedule details	Review published agent schedules, selecting from the enterprise model, organizational tree, or user groups.	Supervisor and above
Enterprise model	Review agent schedules for a user-defined date range by selecting from the Enterprise Model.	Scheduler and above
Supervisor tree	Review agent schedules for a user-defined date range using the organizational chart	Supervisor and above
Custom user group	Review agent schedules for a user-defined date range by selecting a custom user group.	Supervisor and above
Published event summary	Report event summaries for your scheduled hours using a variety of report criteria.	Agent
Schedule analysis	Analyze your current contact volume and staffing situation.	Scheduler and above
Schedule analysis details	Show the detailed published schedule analysis report.	Scheduler and above
Schedule analysis weekly view	Show the interval analysis for each day of the reported week.	Scheduler and above
Full service metric summary	Show the full published service metric summary report.	Scheduler and above

Menu title	Purpose	Recommended role(s)
Compact service metric summary	Show the compact published service metric summary.	Scheduler and above
Schedule summary (printer)	Printer-friendly (text) schedule summary, including start and stop times for each day of the selected week.	All users
Schedule details (printer)	Printer-friendly (text) schedule detail, including individual events, from the published schedule.	All users
Shrinkage report	Show the published schedule shrinkage report.	Scheduler and above
Published event summary	Houses reports for hours by event type and interval using a variety of summary options.	Supervisor and above
Enterprise model	Report event summaries by picking an activity from the Enterprise Model.	Scheduler and above
Supervisor tree	Report event summaries by picking a supervisor from the organizational chart.	Supervisor and above
Custom user group	Report event summaries by picking a custom user group.	Supervisor and above
Intraday analysis	Generate intra-day performance reports.	Scheduler and above
Intraday performance monitor	How are we doing today?	Scheduler and above
Schedule analytics	Review key performance metrics from the published schedule	Scheduler and above
Schedule adherence	Generate real-time or historical reports based on agent schedule adherence	Scheduler and above

Menu title	Purpose	Recommended role(s)
Daily schedule adherence	Houses reports for reviewing daily adherence	Supervisor and above
Enterprise model	Review daily schedule adherence information by selecting from the enterprise model.	Scheduler and above
Supervisor tree	Review daily schedule adherence information by selecting from the organizational chart.	Supervisor and above
Custom user group	Review daily schedule adherence information by selecting a custom user group.	Supervisor and above
Adherence alerts	Display current, real-time agent adherence information.	Supervisor and above
Enterprise model	Display current, real-time agent adherence information by selecting from the Enterprise Model tree.	Scheduler and above
Supervisor tree	Display current, real-time agent adherence information by selecting from the Organizational Chart.	Supervisor and above
Custom user group	Display current, real-time agent adherence information by selecting a custom user group.	Supervisor and above
Schedule adherence history	Review agent adherence summary information for a user-defined date range.	Supervisor and above
Enterprise model	Review agent adherence summary information for a user-defined date range by selecting from the enterprise model.	Scheduler and above
Supervisor tree	Review agent adherence summary information for a user-defined date range by organizational chart.	Supervisor and above

Menu title	Purpose	Recommended role(s)
Custom user group	Review adherence summary information for a user-defined date range for members of a custom user group.	Supervisor and above
Schedule adherence summary	Show a summary of Adherence Intervals over time.	All users
Enterprise model	Report and review Adherence Interval Data by picking an activity from the Enterprise Model.	Scheduler and above
Supervisor tree	Report and review Adherence Interval Data by picking a supervisor from the organizational chart.	Supervisor and above
Custom user group	Report and review Adherence Interval Data by picking a custom user group.	Supervisor and above
Agent	Report and review Agent specific Adherence Summary Data.	Agent
Device state detail report	Review the detailed transactions collected from the data source that comprise the adherence statistics.	Supervisor and above
Enterprise model	Review the detailed list of transactions collected from the data source by enterprise model.	Scheduler and above
Supervisor tree	Review the detailed transactions collected from the data source by organizational chart.	Supervisor and above
Custom user group	Review the detailed transactions collected from the data source that comprise the adherence statistic.	Supervisor and above

Menu title	Purpose	Recommended role(s)
Daily paid time	Report actual paid hours based on agent state information and paid events on your agents' schedules	Supervisor and above
Enterprise model	Report actual paid hours based on agent state information and paid events on your agents' schedules by enterprise model.	Scheduler and above
Supervisor tree	Report actual paid hours based on agent state information and paid events on your agents' schedule by organizational chart.	Supervisor and above
Custom user group	Report actual paid hours based on agent state information and paid events on your agents' schedules by custom user group.	Supervisor and above
Schedule adherence comparison	Show a comparison report for schedule adherence.	Supervisor and above
Daily schedule adherence	Report on your daily adherence statistics, including detail transactions, for a user-defined date range.	Agent
Device state detail report	Review the detail agent state transactions as captured from the data source.	Agent
Administrative & utility	Show reports useful for system administration and troubleshooting.	Administrator
Application exceptions	Review application error logs to help troubleshoot any system errors that users report.	Administrator
Data source logins	Review the current logins for your people for each data source you have defined in the system.	Administrator

Menu title		Purpose	Recommended role(s)
	Database health and statistics	Review database sizes, row counts and status of scheduled jobs.	Administrator
	Event Review Status Change	Review the latest status change to events in the system using a variety of filter options.	Administrator
	Change audit log	Review the list of system changes to key application components.	Administrator
	Data targets	Define data to be exported	Administrator
	User Logon Report	Show the report of user logon times and durations (current logons only)	Administrator
Help		Show the inventory of help videos to guide you through various parts of the application. Video topics vary depending on role.	All users