



Impersonating Supervisors

For CommunityWFM Software Version 5.x
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About this document

This document reviews *Impersonate supervisors* and describes how to set up and use the feature.

Why impersonate a supervisor?

Impersonating a supervisor allows one supervisor (or scheduler or administrator) to see and manage agents assigned to another supervisor including adjusting schedules, monitoring adherence, reviewing/approving/denying time off requests. You can view and manage any report that includes a supervisor view.

How do I impersonate a supervisor?

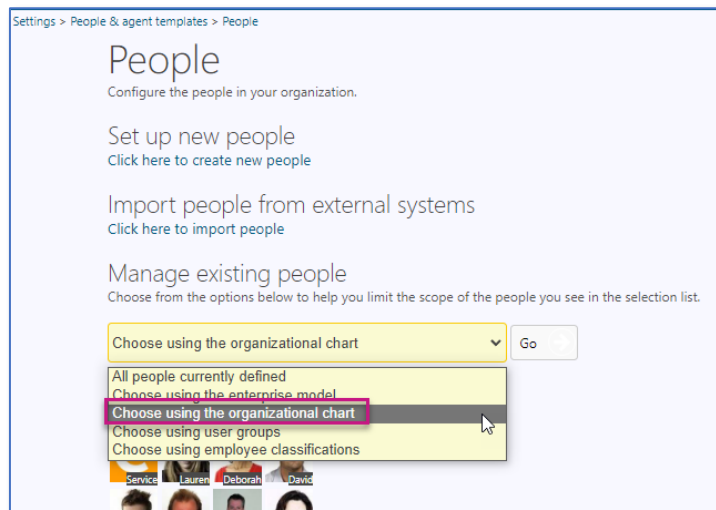
Notes:

- Each person selects their own impersonations – who they are impersonating.
- A person cannot change another person's impersonations, or stop someone from impersonating them (if they are in the list of eligible people).
- Impersonation is not reciprocal, e.g., if Joe impersonates Jim, Jim cannot impersonate Joe until Jim adds Joe to his list.
- The impersonate function is not available at the Agent level (i.e., agents cannot impersonate people in other roles, even if the option is added to their menu).
- You can impersonate those supervisors/schedulers/administrators who are on the same reporting tree in the organizational model.
- You cannot add a person to impersonate if that person is logged in to Community. This setting can be changed in the Global settings & preferences to *Enable virtual supervisor impersonation for supervisors currently logged into Community*.
- When you impersonate someone, you will be able to see all of the people that person sees.

Viewing the organizational chart

First, review your organizational model to determine each person's role and who reports to whom. To view this list, your role must have access to the application menu for People & Agent templates (typically Scheduler and above).

To view the list of who reports to whom in your center, navigate to Settings > People & agent templates > People.



In the *Manage existing people* drop-down menu select *Choose using the organizational chart*.

The list shows the hierarchy of your center. You can collapse sections of the list using the down arrows next to the names.

Select a supervisor name to open the list of people for that group. The color bar to the left of the picture indicates the person's role in Community.





Green = agent

Yellow = supervisor

Brown = scheduler

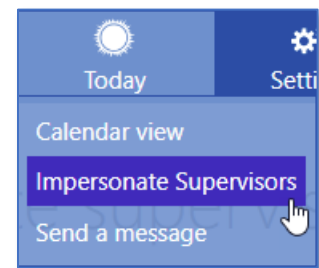
Purple = administrator

Name	Employee id	Hire date	Title	Tiebreak	
 Bixler, Lyon	lbixler	15 May 2017	Sales/Service Rep	0	Delete
 Blair, Travis	tblair	01 Feb 2016	Supervisor	0	
 Brown, Chanell	cab17889	21 Aug 2015	Sales/Service Rep	0	Delete
 Brown, Matt		01 Jul 2020		0	Delete
 Heinly, Gesela	gah21056	18 Jan 2010	Sales/Service Rep	0	Delete
 Hooper, Lisa	LFH17324	03 Oct 2016	Supervisor	0	
 Houck, Matthew	MDH21220	25 Apr 2016	Sales/Service Rep	0	Delete

Adding a new person to your impersonation list

To select the person or persons you wish to impersonate:

1. Navigate to Today > Impersonate Supervisors.
2. Click *Add Supervisors*.
3. In the pop-up window you will see a list of all people eligible for you to impersonate.
4. Click *Add* for each person you wish to impersonate. Once added that person disappears from this list.
5. Close the pop-up window and view all selected people. If needed, click *Remove* to remove a supervisor from the list.



Note: If the person you wish to impersonate is logged in, you cannot add them to your list of people. Once selected, their login status will not affect your ability to impersonate them.

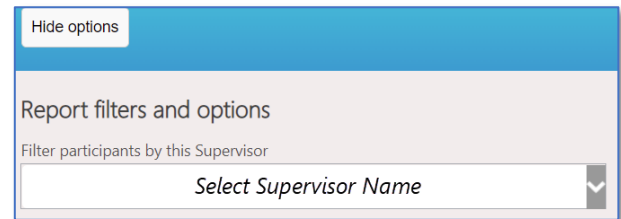
Impersonate other supervisors			
The following list contains the supervisors that are eligible for impersonation. Click the "Add" button to impersonate the selected supervisor.			
Supervisor name	Reports to	Status	
Gonos, Daryl	Account, Service	Logged In	☐
Nixon, Jacqui	Gonos, Daryl	Logged Out	Add
Mitchell, Lauren	Cotharin, Todd	Logged Out	Add

6. After adding, the person will receive a memo that you are impersonating them.



Filtering by supervisor

Once added, you will see the other supervisor(s) and their direct reports in your options panel when running a report that includes a supervisor filter. In the *Filter participants by this Supervisor* drop-down menu, select the name of the supervisor to impersonate. When you click *Apply options*, the report will return the list of that supervisor's team.



How do I stop impersonating

Your ability to view the other persons team will continue until you return to the list of impersonated supervisors and select *Remove* then click *OK* to confirm. The other person will receive a notification that you are no longer impersonating them.

