



Application Menus

For Community Software Version 5.0+
Version: 1.0
May 11, 2022



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Application Menus

About this document

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

What are application menus?

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

Agents typically see the fewest menu items. Common structure includes Today with a calendar option; a panel for time off requests (Plan); Schedule - but with just a few options to avoid confusion; Reports, but only Published Schedule and Schedule Adherence; and Help with appropriate videos.

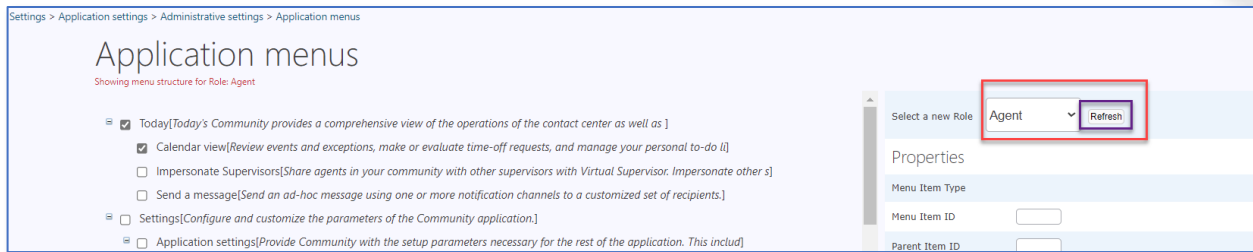
Supervisors typically see Today - with calendar view and Impersonate supervisor -giving them the ability to run reports as other supervisors; Plan - to view schedule transactions and auto-approve rules; Reports; and Help.

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

View current menu selections

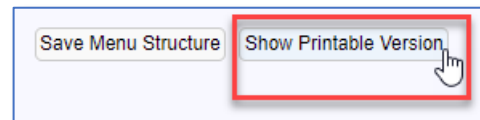
To view and customize the menus, navigate to Settings > Application settings > Administrative settings > Application menus.

The left side shows all of the available menu items, a description of the function of the menu item in brackets, with check marks for the current selections for the role identified at the top of the screen.



To view a different role, make the selection in the drop-down box on the upper right and click *Refresh*.

To view **all** roles and their current selections, click *Show printable Version* at the bottom of the screen. **Note:** With this report open 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.

Click *Save Menu Structure* at the bottom of the list.

Edit roles for menu items

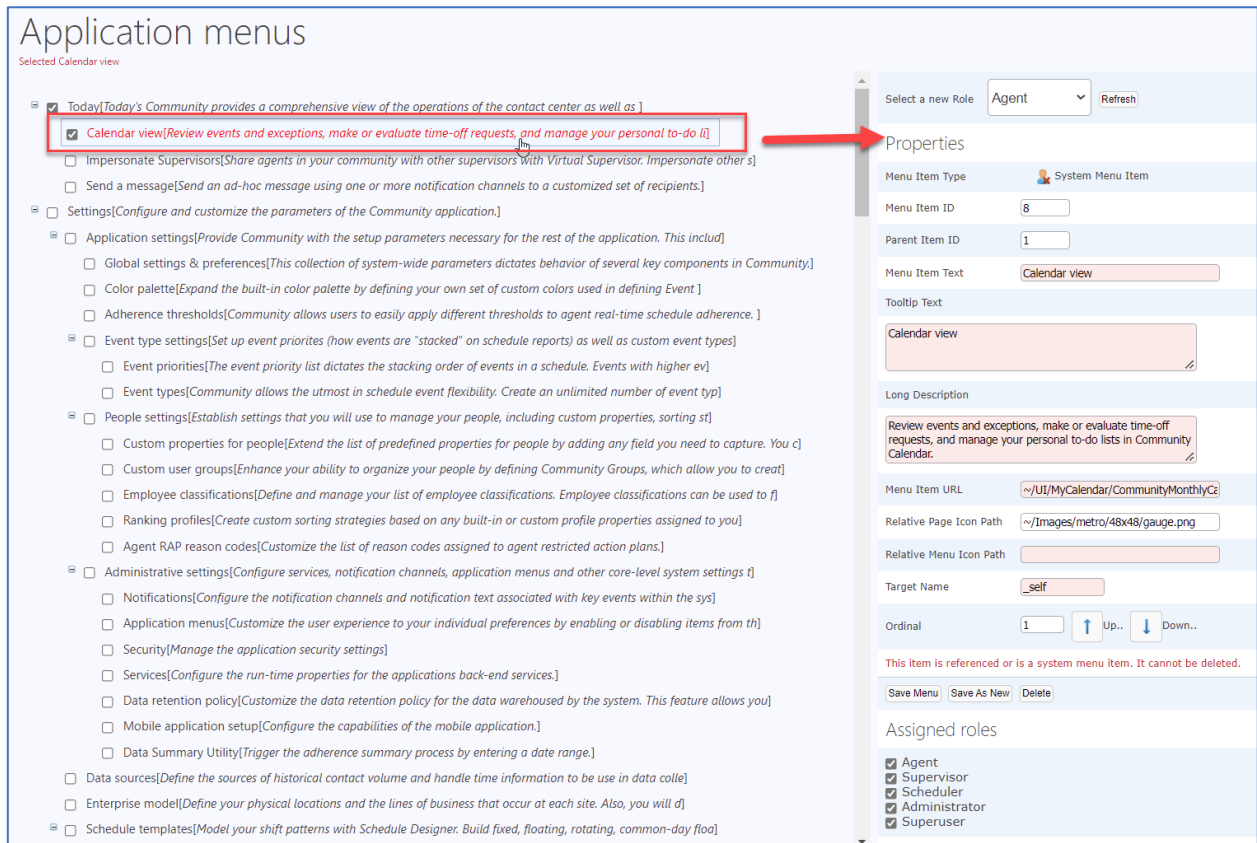
Click on the text of the menu item to populate the Properties on the right. At the bottom of the panel, check or uncheck the Assigned roles to add or remove the menu item for that role. When finished, click *Assign to selected roles* to save your changes.

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.

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 text or location of the menu items. If changed, it may be harder to receive support when the names no longer match, and the training videos will not be accurate if people try to follow along.



Application menus
Selected: Calendar view

- ☒ Today[Today's Community provides a comprehensive view of the operations of the contact center as well as]
 - ☒ **Calendar view[Review events and exceptions, make or evaluate time-off requests, and manage your personal to-do list]**
 - ☐ Impersonate Supervisors[Share agents in your community with other supervisors with Virtual Supervisor. Impersonate other s]
 - ☐ Send a message[Send an ad-hoc message using one or more notification channels to a customized set of recipients.]
- ☐ Settings[Configure and customize the parameters of the Community application.]
 - ☐ Application settings[Provide Community with the setup parameters necessary for the rest of the application. This includ]
 - ☐ Global settings & preferences[This collection of system-wide parameters dictates behavior of several key components in Community.]
 - ☐ Color palette[Expand the built-in color palette by defining your own set of custom colors used in defining Event]
 - ☐ Adherence thresholds[Community allows users to easily apply different thresholds to agent real-time schedule adherence.]
 - ☐ Event type settings[Set up event priorities (how events are "stacked" on schedule reports) as well as custom event types]
 - ☐ Event priorities[The event priority list dictates the stacking order of events in a schedule. Events with higher ev]
 - ☐ Event types[Community allows the utmost in schedule event flexibility. Create an unlimited number of event typ]
 - ☐ People settings[Establish settings that you will use to manage your people, including custom properties, sorting st]
 - ☐ Custom properties for people[Extend the list of predefined properties for people by adding any field you need to capture. You c]
 - ☐ Custom user groups[Enhance your ability to organize your people by defining Community Groups, which allow you to creat]
 - ☐ Employee classifications[Define and manage your list of employee classifications. Employee classifications can be used to f]
 - ☐ Ranking profiles[Create custom sorting strategies based on any built-in or custom profile properties assigned to you]
 - ☐ Agent RAP reason codes[Customize the list of reason codes assigned to agent restricted action plans.]
 - ☐ Administrative settings[Configure services, notification channels, application menus and other core-level system settings t]
 - ☐ Notifications[Configure the notification channels and notification text associated with key events within the sys]
 - ☐ Application menus[Customize the user experience to your individual preferences by enabling or disabling items from th]
 - ☐ Security[Manage the application security settings]
 - ☐ Services[Configure the run-time properties for the applications back-end services.]
 - ☐ Data retention policy[Customize the data retention policy for the data warehoused by the system. This feature allows you]
 - ☐ Mobile application setup[Configure the capabilities of the mobile application.]
 - ☐ Data Summary Utility[Trigger the adherence summary process by entering a date range.]
 - ☐ Data sources[Define the sources of historical contact volume and handle time information to be use in data colle]
 - ☐ Enterprise model[Define your physical locations and the lines of business that occur at each site. Also, you will d]
 - ☐ Schedule templates[Model your shift patterns with Schedule Designer. Build fixed, floating, rotating, common-day floa]

Properties

Select a new Role: Agent Refresh

Menu Item Type: System Menu Item

Menu Item ID: 8

Parent Item ID: 1

Menu Item Text: Calendar view

Tooltip Text: Calendar view

Long Description: Review events and exceptions, make or evaluate time-off requests, and manage your personal to-do lists in Community Calendar.

Menu Item URL: ~/UI/MyCalendar/CommunityMonthlyCa

Relative Page Icon Path: ~/Images/metro/48x48/gauge.png

Relative Menu Icon Path:

Target Name: self

Ordinal: 1 Up.. Down..

This item is referenced or is a system menu item. It cannot be deleted.

Save Menu Save As New Delete

Assigned roles

- ☒ Agent
- ☒ Supervisor
- ☒ Scheduler
- ☒ Administrator
- ☒ Superuser

Edit the menu properties

Properties

Menu Item Type

System Menu Item

Menu Item ID

8

Parent Item ID

1

Menu Item Text

Calendar view

Tooltip Text

Calendar view

Long Description

Review events and exceptions, make or evaluate time-off requests, and manage your personal to-do lists in Community Calendar.

Menu Item URL

~/UI/MyCalendar/CommunityMonthlyCe

Relative Page Icon Path

~/Images/metro/48x48/gauge.png

Relative Menu Icon Path

Target Name

_self

Ordinal

1

Up..

Down..

This item is referenced or is a system menu item. It cannot be deleted.

Save Menu

Save As New

Delete

Assigned roles

☒ Agent
 ☒ Supervisor
 ☒ Scheduler
 ☒ Administrator
 ☒ Superuser

Assign to selected roles

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. 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: Who will see this menu item. If you make changes, click *Apply to selected roles*. You may need to logout and log back in to see the changes.