

Aspect Cloud Workforce (the New Experience)

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Introduction

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Rev A

November 7, 2025

▼ About this guide

This guide is designed for Aspect Cloud Workforce (the New Experience) users, including both administrators and employees. It provides comprehensive instructions for getting started, managing accounts, and utilizing key features of the platform.

The guide is organized into sections based on user roles and common tasks, with expandable toggles that allow you to quickly navigate to the specific information you need. Simply click on any toggle to reveal detailed step-by-step instructions, helpful tips, and visual aids.

Whether you're registering your account for the first time, managing user invitations as an admin, or adjusting your personal settings, you'll find clear guidance throughout this documentation.

▼ Aspect Cloud Workforce (the New Experience) overview

Aspect Cloud Workforce (the New Experience) simplifies and optimizes schedule management by aligning employee preferences with business needs while addressing overstaffing and understaffing challenges. Meticulously designed to meet contemporary business needs without the burden of

unnecessary features, the New Experience offers a simplified user interface with streamlined scheduling, proactive notifications, easy shift management, and predictive insights on shift approvals.

Built with privacy in mind, The New Experience gives employees increased agency over their schedules, improving job satisfaction and streamlining operational efficiencies - all while protecting user privacy. The New Experience also seamlessly integrates with Aspect Workforce Management (WFM), offering a unified platform to manage schedules and preferences that foster better communication and collaboration across teams, ultimately boosting productivity.

If you have already signed up for the New Experience, open the email invitation from the Aspect team and [register your account](#).

The New Experience is now available in the US, EU, UK, and Canada.

▼ **Aspect Intelligence™ overview**

Aspect Cloud Workforce (the New Experience) now includes Aspect Intelligence™, a new capability that helps enterprises shift from static workforce planning to real-time operational control.

Aspect Intelligence™ is designed to help teams spot risk earlier and act faster, reducing the time and effort spent on last-minute adjustments when plans change.

Aspect Cloud Workforce (the New Experience) advances Aspect Intelligence™ with enhanced AI and purposeful automation, enabling the platform to not only forecast demand but also initiate timely operational adjustments. These capabilities reduce manual intervention, strengthen forecast reliability, and help maintain staffing alignment with real-world conditions.

Aspect Intelligence™ enables [Automated Schedule Updates](#) that allow admins to automatically add the correct schedule segment when cleared adherence alarms fire—eliminating manual schedule fixes.

Aspect Intelligence™ is now available in the U.S., U.K., Europe, and Canada.

▼ **All users: Register your account**



Registering your account by email is only needed for unfederated users. The email registration process does not apply to federated users.

1. Open the email titled, "**Accept your invitation to Aspect Workforce Experience**" and click **Accept your invite to Workforce Experience**.



The invite email includes the account name you will use to log into the New Experience. The invite email will expire after 7 days. If the email expires, contact your Workforce Administrator to resend the email.

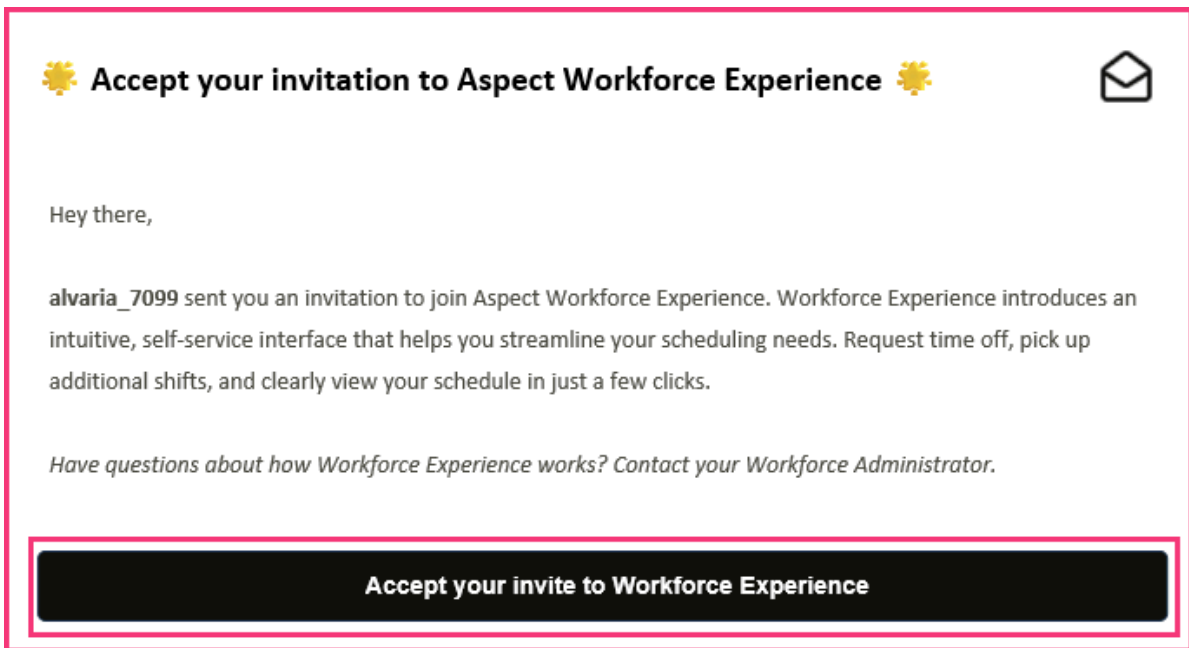


Figure 1-1

2. You will be redirected to the **Let's Get Started** page.



When **Federated Login** is enabled on your account, you will not be required to create and confirm a password. You will be redirected to your company's authentication provider to verify your identity. If you have already authenticated in your current browser session, you will be automatically logged into the New Experience.

3. Type your first and last name.
4. The account name will be preselected for you.
5. Select an answer from the drop-down menu that describes your work.
6. Create and confirm a password.
7. Select the check box to accept the terms and conditions and privacy policy.
8. When you are finished, click **Get Started**.

Figure 1-2

9. You are now logged into the New Experience. The next time you need to log in, visit the [login page](#).



See how Admins can send invites for the New Experience to other Admins or Employees.

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▼ **All users: Log in to Aspect Cloud Workforce (the New Experience)**

1. [Open the New Experience](#), select or type your **Account name** and click **Continue**.



When **Federated Login** is enabled on your account, you will be redirected to your company's authentication provider to verify your identity. If you have already authenticated in your current browser session, you will be automatically logged into the New Experience.



If you don't know your Account name, look for it in the invite email or contact your Workforce Administrator for more help.

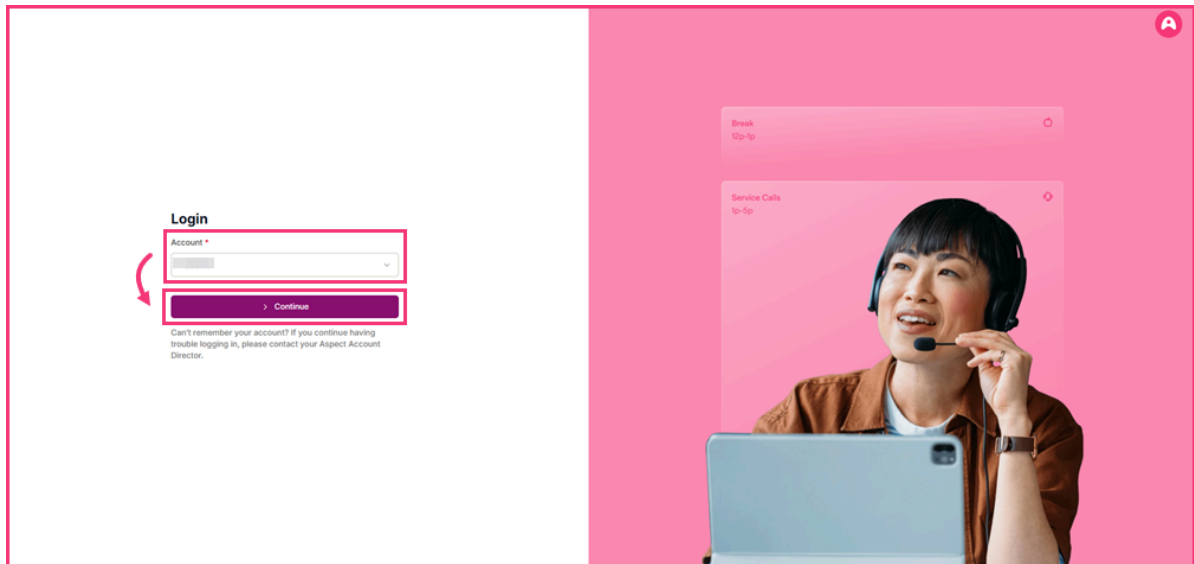


Figure 1-1

2. Type your **email** (where you received the invite email) and **password** and click **Login**. See how to [reset your password](#) if needed.

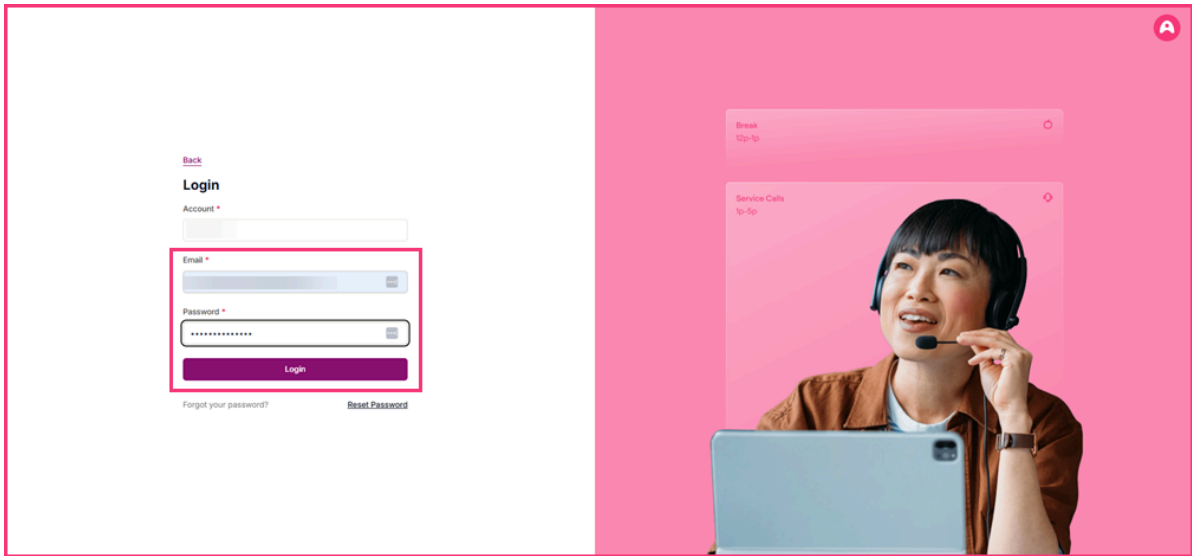


Figure 1-2

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▼ **All users: Adjust the Timezone, Time Format, or Date and Number format**

The New Experience automatically displays dates, times, numbers, and currency in formats familiar to each user by detecting and applying their regional settings.

Personal Settings include:

- Time zone selection
- 12-hour or 24-hour clock format
- Regional settings

1. [Open the New Experience and log in.](#)
2. In the upper right corner, click the **Profile** icon and click **Personal Settings**.

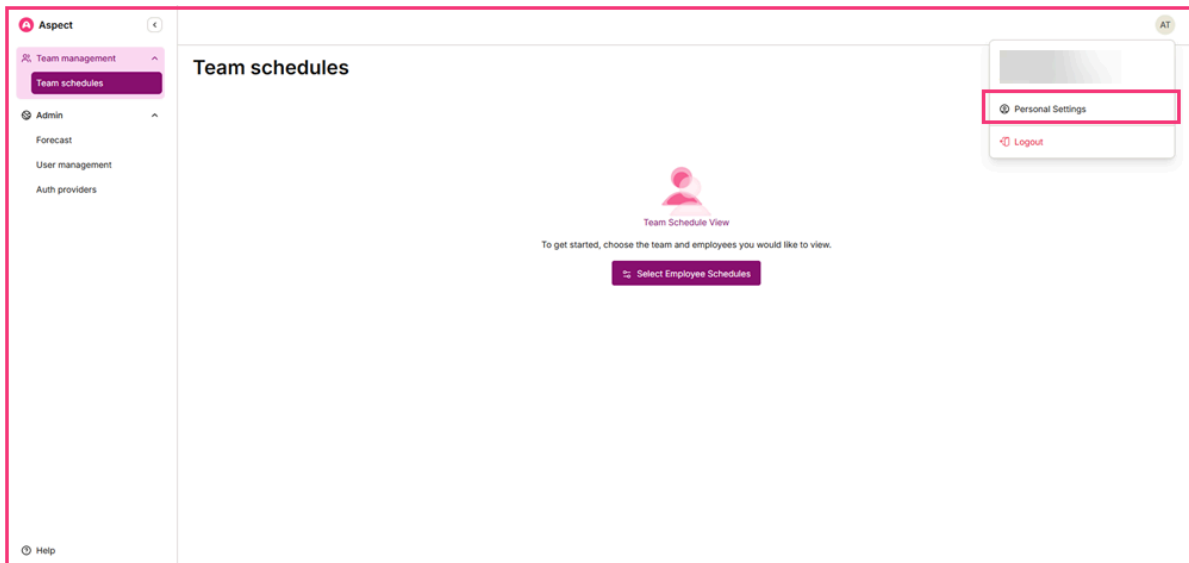


Figure 1-1



Some administrator features will reflect the selections made in their personal settings.

- Users can view forecasts in their preferred time zone, though this is not the default setting. Administrators can view schedules across different time zones. The date and time format for created and updated apps will follow the user's time zone settings.
- View My Team's Schedule: Time zones can be manually selected on this page..
- All elements will follow the user's preferred clock settings. The time zone will reflect the routing set, forecast, and staff group time zone. Administrators can view schedules in different time formats (12-hour or 24-hour).
- All elements will follow the users Region setting for date/time, digit.

3. Select an option from the **Timezone** drop-down menu and click **Save Settings**.

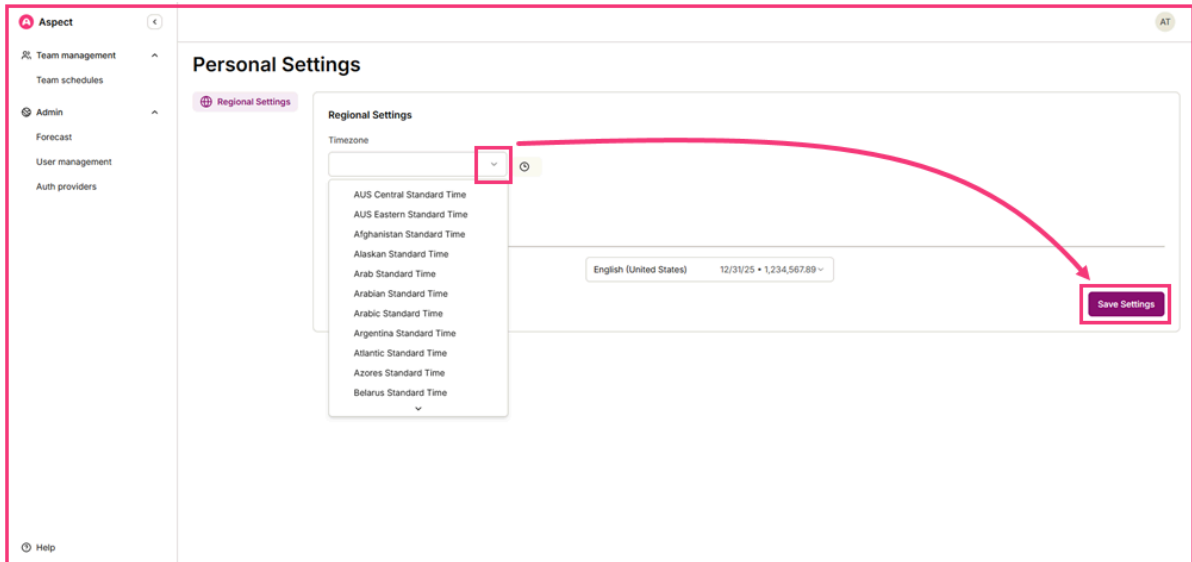


Figure 1-2

4. Select a radio button next to your preferred **time format** and click **Save Settings**.

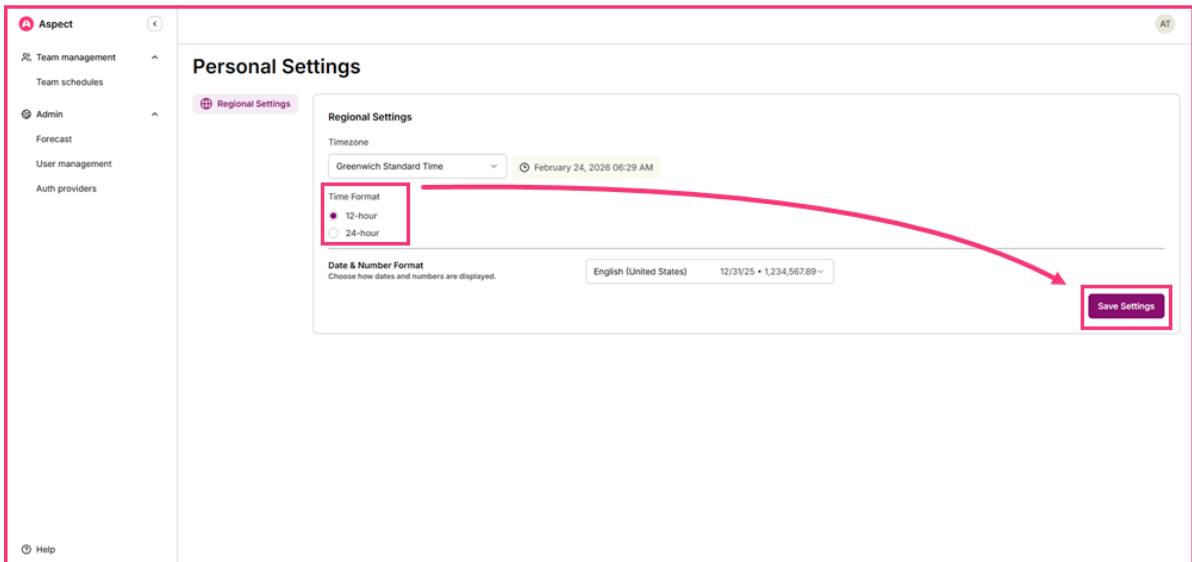


Figure 1-3

5. Select an option from the **Date & Number Format** drop-down menu and click **Save Settings**.

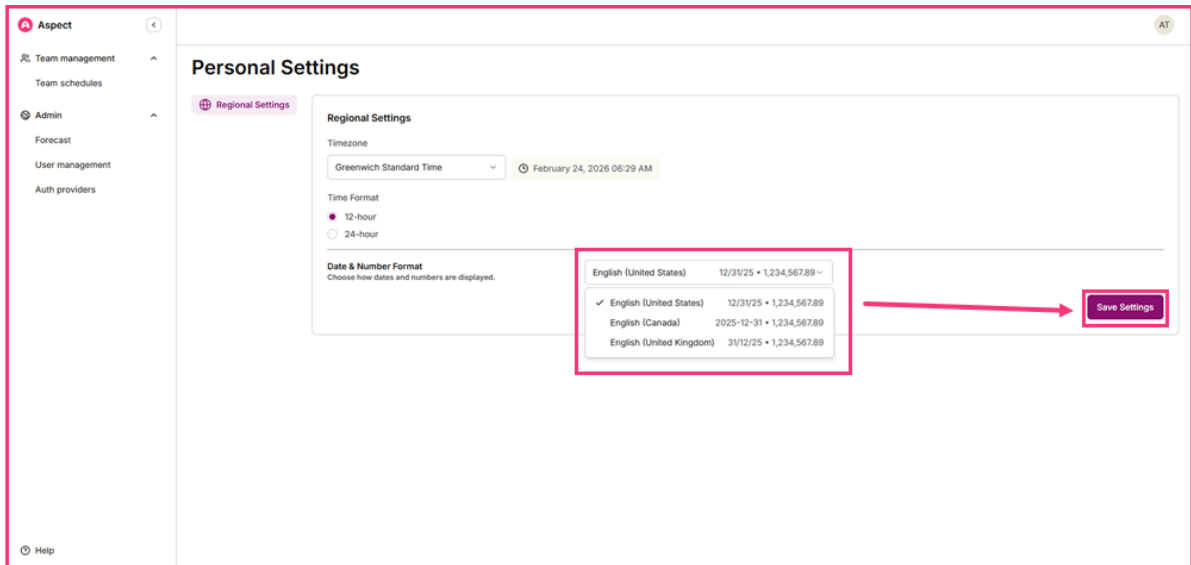


Figure 1-4

6. The changes are now updated.

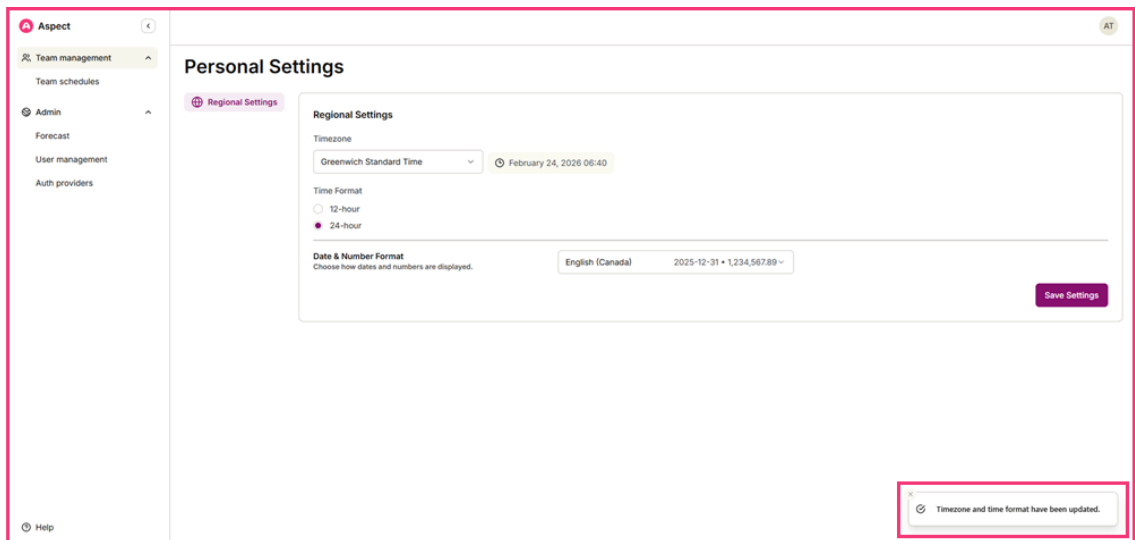


Figure 1-5

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▼ All users: Overview of roles in Aspect Cloud Workforce (the New Experience)



- Access and permissions for Employees and Regular Users in the New Experience are linked to WFM security profile settings.
- The Developer Role will be available to assign to a new user or existing user in the User Management settings.

The New Experience Role	Feature Access	Backend Integration	WFM Role
Admin	<ul style="list-style-type: none">• Access to all features except Employee features.	<ul style="list-style-type: none">• Admin Users are created, edited, deactivated and/or deleted in the New Experience.	Admin
Regular User	<ul style="list-style-type: none">• View Team schedules• Edit Team schedules (with permissions from WFM)	<ul style="list-style-type: none">• Regular Users are created, edited, deactivated, and/or deleted in WFM.	Regular User
Employee	<ul style="list-style-type: none">• Access to Employee Scheduling features and Performance Hub.	<ul style="list-style-type: none">• Employee Users are created, edited, deactivated, and/or deleted in WFM.	Employee

- Admins will have access to all functionality listed in the [Admin Management](#) section.
- Employees will have access to all functionality listed in the [Employee Schedule Management](#) section.
- Regular users can [view team or employee schedules](#), but they cannot [edit schedules](#) unless they have the appropriate WFM permissions.

Admin Management

▼ Admin: Dashboard overview

The Admin Dashboard has three main sections, accessible from the menu on the left of the screen:

- **Team Management and Team Schedules:** The [Team Schedules view](#) gives Admins full schedule visibility to manage their employees or teams effectively.
- **Forecast (Beta):** The [Forecast Dashboard](#) view provides two ways to view forecast data. The **Intelligent** view displays forecasts using AI-generated data, while the **Classic** view shows user-created WFM forecasts.
- **User Management:** The [User Management view](#) allows you to manage the activation status for all users in your account. As an Admin, this is where you can activate, invite, or remove a user from your account.
- **Workflow Catalog:** The [Workflow catalog](#) allows Admins to create, configure, and manage Agents workflows. It is divided into two sections: Workflow Catalog and Workflow Builder.

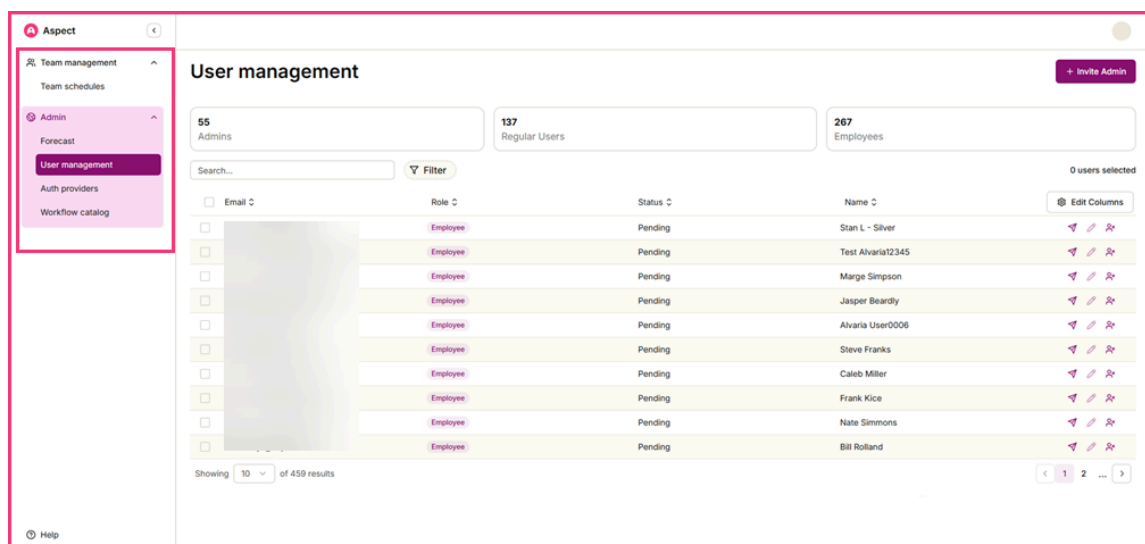


Figure 1-1

If you are using a [Federated environment](#), learn how it impacts your user management experience.

We recommend reviewing the articles in this section to familiarize yourself with the Admin features available in the New Experience.

▼ Admin: Federated environment overview

What is a Federated environment?

- A Federated environment or Federated login eliminates inconsistent authentication across Aspect products.
- Using a standards-based Single Sign On (SSO) approach, it allows Aspect Cloud Workforce (the New Experience) users to sign in through their organization's existing Identity Provider (IdP), creating a smoother and more secure experience.
- This eliminates the need for users to register for an account or create and maintain separate credentials for the New Experience.



The New Experience Enablement Information

- Federated Login for Aspect Cloud Workforce (the New Experience) is compatible with **Azure Entra ID** and **OKTA** (additional providers will be added soon)
- Configured independently in IdP (on client side) from any existing Aspect products (WEM, WFM)
- Uses SAML 2.0 standard
- Service Provider (SP) initiated login (IdP initiated is not available at this time but may be in the future)

What are the benefits of Federated Login?

Federated Login provides significant benefits to New Experience users and to your organization's administrators.

- **Single sign on (SSO)** – When a user's organization account is linked to their Aspect account, they no longer need to remember a New Experience username and password. Instead, they access the New Experience by logging in with their organization account credentials.

- **Organizational control over the login process** – Because users log in through their organization's accounts, the organization maintains full control over the login process and credentials. This allows them to set their own requirements for password length, complexity, change frequency, two-factor authentication, and other security policies.
- **Automated Onboarding** - After Workforce integration and Federation activation in the New Experience, all employee users from WFM will be automatically activated in the New Experience. This removes the requirement for employees to register for the New Experience.

How will this impact users registering an account and logging in?

Employees and Admins do not need to take any action for Federated Login setup. Their IdP SSO credentials are managed entirely through their organization's identity provider.

After Workforce Integration and Federation activation in the New Experience, all employee users from WFM will be automatically activated in the New Experience and will not need to register for a New Experience account.

How do I request enablement for Federated Login?



- If you do not currently have the New Experience but plan to implement it in the future, federation will be discussed as an option with your team during that engagement process.
- If you currently have the New Experience but do not have federation enabled, contact your Aspect account representative to request Federated Login setup.

1. Your Aspect account representative will coordinate with the appropriate Aspect resources and schedule a meeting to discuss your requirements and configuration details.
2. Our Aspect Federation Enablement team will provide these required identity provider (IdP) details (needed for Step 3):

- Identifier (Entity ID)
 - Reply URL (ACS URL)
 - Required SAML attributes
3. Your organization will configure the New Experience as a Service Provider (SP) within your identity provider (IdP).
 4. You will send Aspect the IdP metadata configuration details as a **metadata.xml** file or **URL** (Required for Step 5).
 5. The Aspect Federation Enablement team will implement the Service Provider (SP) configurations within the New Experience.
 6. The Aspect team will conduct quality assurance testing and notify you when configuration is complete.
 7. Your organization can then test and verify that Federated Login functions properly in the New Experience.

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▼ **Admin: User Management overview**



The User management view gives Admins a single place to manage all users in the account. From here, you can search and filter, invite new Admins or activate Employees, and view each person's status at a glance—Active, Available, Pending, or Deactivated.

For unfederated tenants, you can resend and deactivate or delete Admins as needed, while federated environments automatically activate WFM users after integration and federation are enabled.

Use this view to keep your team list accurate and up to date, and to quickly take the right action when someone joins, changes roles, or leaves.

1. Click **User management** to display the User management view. The total number of Admins, Regular Users, and Employees appears at the top of the screen.

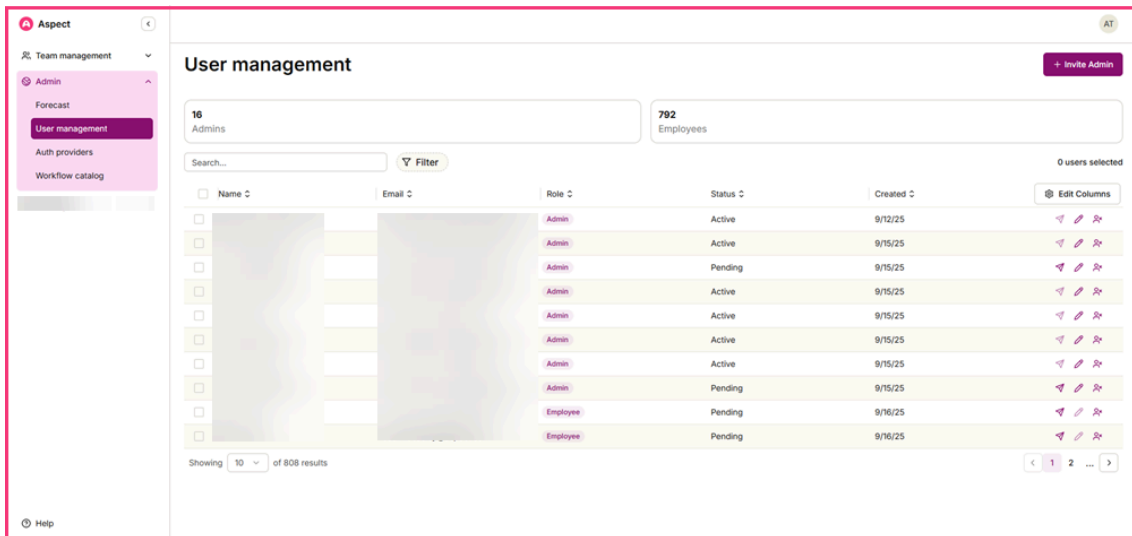


Figure 1-1

2. Click **Edit Columns** to add, remove, or reorder the columns. Click **Apply** when you are done editing.

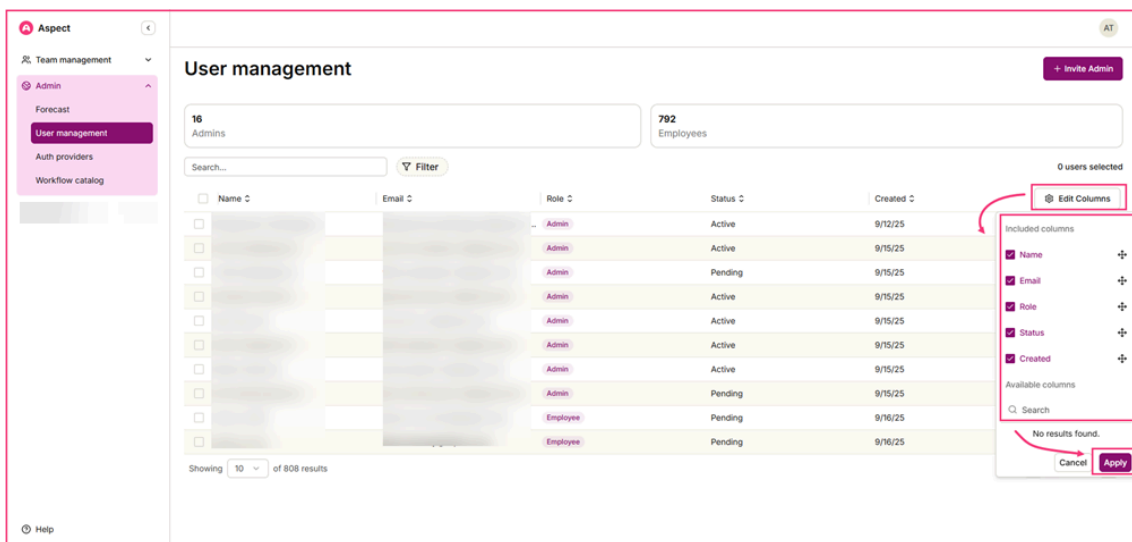


Figure 1-2

3. Click one of the links below for more information on user management tasks you can perform as an Admin.
 - Learn how to [search or filter](#) the list of users.
 - Learn how to activate an [Admin](#) or [Employee](#) account.
 - Learn how to [edit an employee role or update user info](#).

- Learn how to check the status of a user.
- Learn how to resend an email invitation or delete/deactivate a user.

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▼ **Admin: Activate an account for an Admin**



To activate another Admin user, follow the steps below. Invitation emails will only be sent to unfederated accounts.

1. Open the New Experience and log in.
2. Expand **Admin**, click **User management** and in the upper-right corner, click **Invite Admin**.

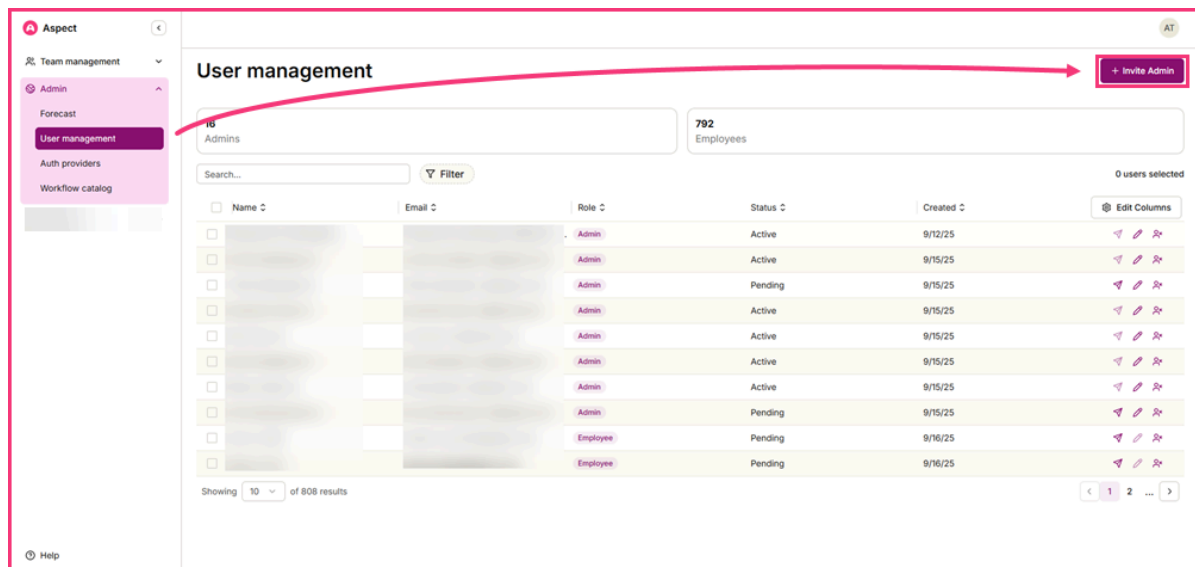


Figure 1-1

3. Type the Admin email address and click **Invite**.
 - Federated tenant: Admin will appear with **Available** status and change to **Active** when they log in.
 - Unfederated tenant: Admin will receive an invitation email with login instructions.



For Unfederated tenants, invites expire after 7 days. If the invite expires, resend the invite. See how to check the status of an invite. Sending admin invites in bulk is not available yet but will be added soon.

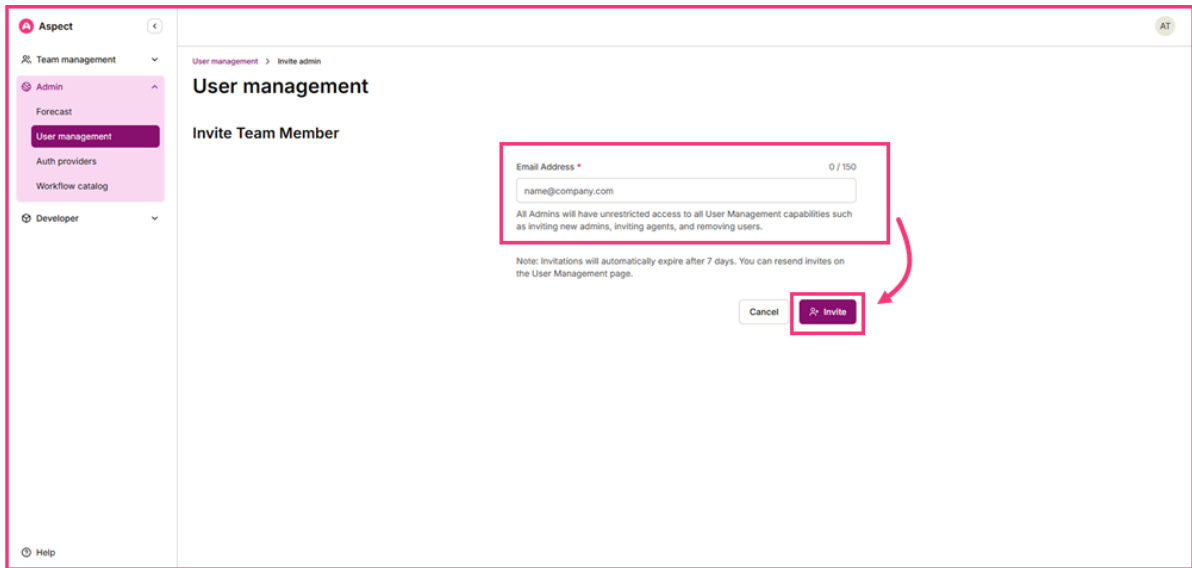


Figure 1-2

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▼ Admin: Activate an account for an Employee or Regular user



Employee or Regular user email addresses must be registered and activated in Aspect WorkforceOS, before they can be activated in the New Experience. You can not add Employee or Regular user emails directly from the New Experience.



For Federated tenants, all WFM Employee or Regular users will automatically be activated once Workforce integration and Federation activation are complete in the New Experience—no separate registration is required. Follow the steps below to activate an employee. The employee or regular user must be in **Available** status to be activated.

1. Open the New Experience and log in.
2. Click **User management** and use the search or filtering options to locate the employee(s) in **Available** status you want to activate.

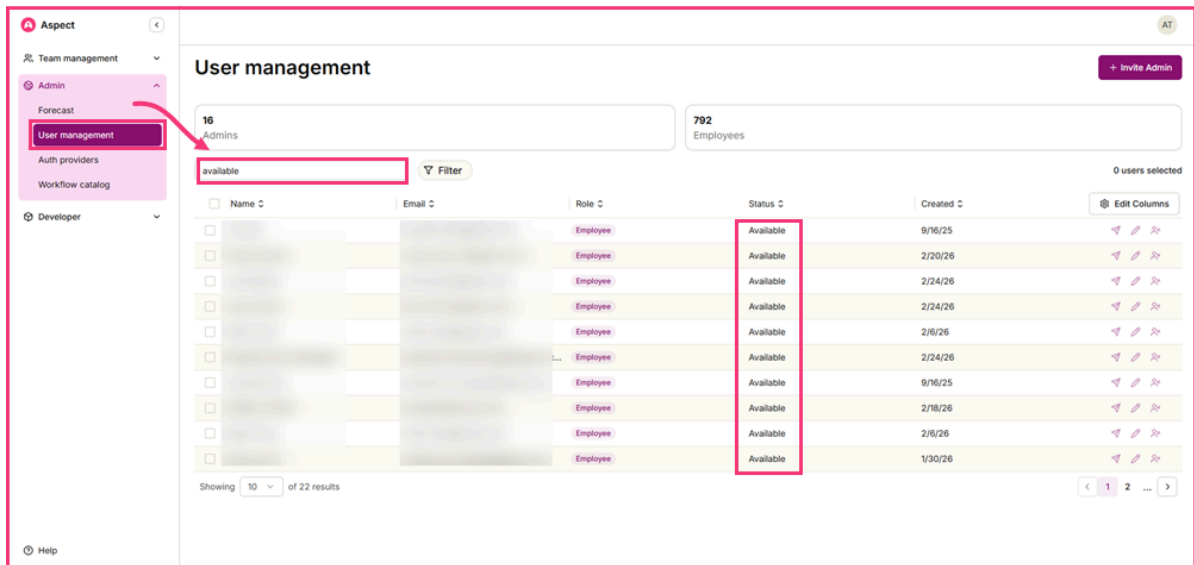


Figure 1-1

3. Select the check boxes next to the **employee names**, click **Actions** and select **Invite Users**.

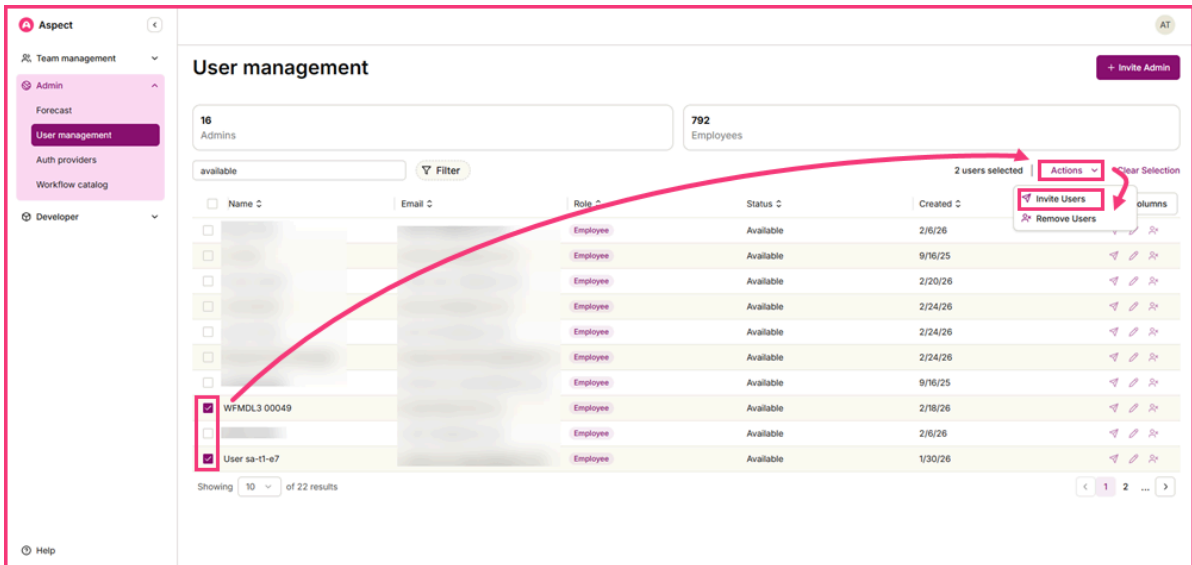


Figure 1-2

4. Review the selected email addresses and click **Invite**.

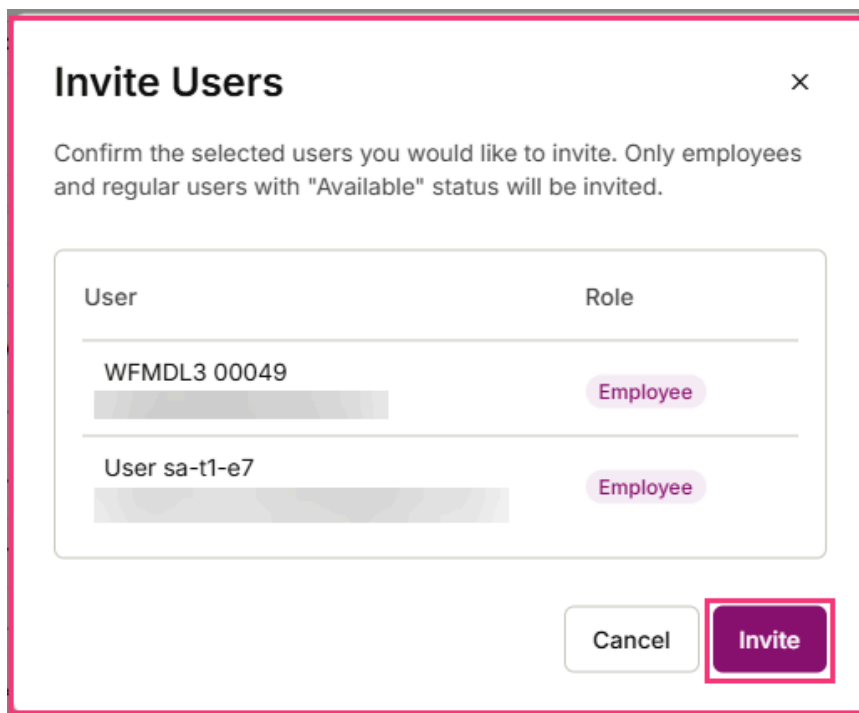


Figure 1-3



- If your account is Unfederated, the employees or regular users will receive invitation emails with log in instructions. Invites expire after 7 days. If the invite expires, resend the invite. See how to check the status of an invite.
- If your account is Federated, employees will NOT receive invitation emails with login instructions. You need to share the login page link directly with them.

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▼ Admin: Search or filter the list of users

Use the Search Bar

1. Open the New Experience.
2. Expand **Admin** and click **User management**.
3. Type your search criteria in the search bar and press **Enter**. In this example we entered Stan because we are searching for the name of the user. You can search by name, email, role, or status.



When using the Search bar, you can enter the partial or full entry of your search criteria. The search will compile results for all the filtering options (Name, Email, Role, Status).

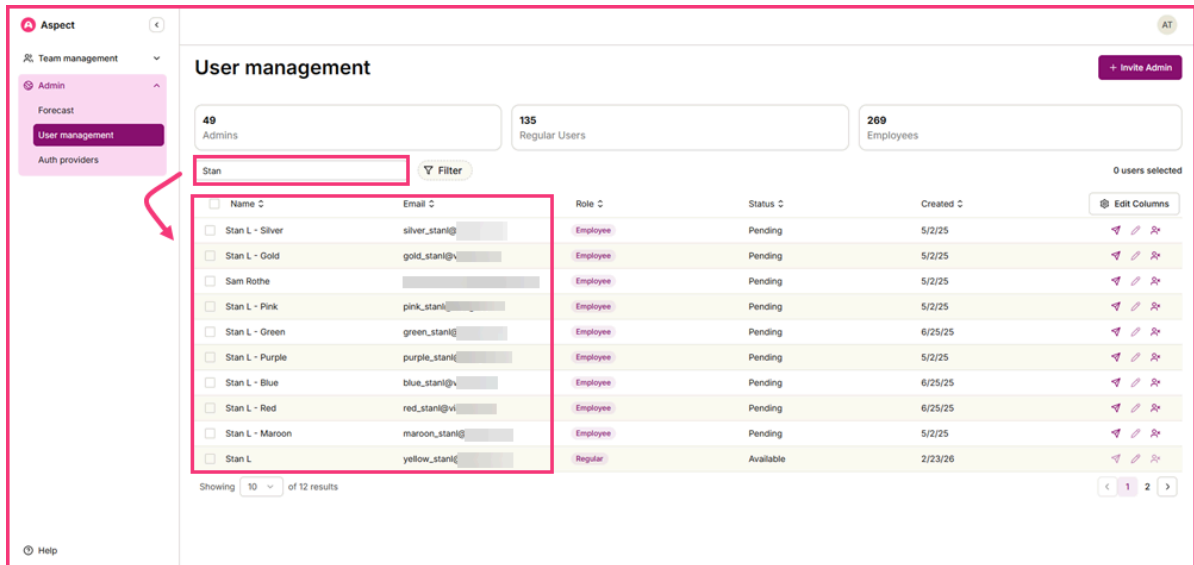


Figure 1-1

Use the Filtering Options

1. Open the New Experience.
2. Expand **Admin** and click **User Management**.
3. Click **Filter** and select a filtering option. You can filter by Name, Email, Role, Status, or Created date. In this example, we selected **Role**.

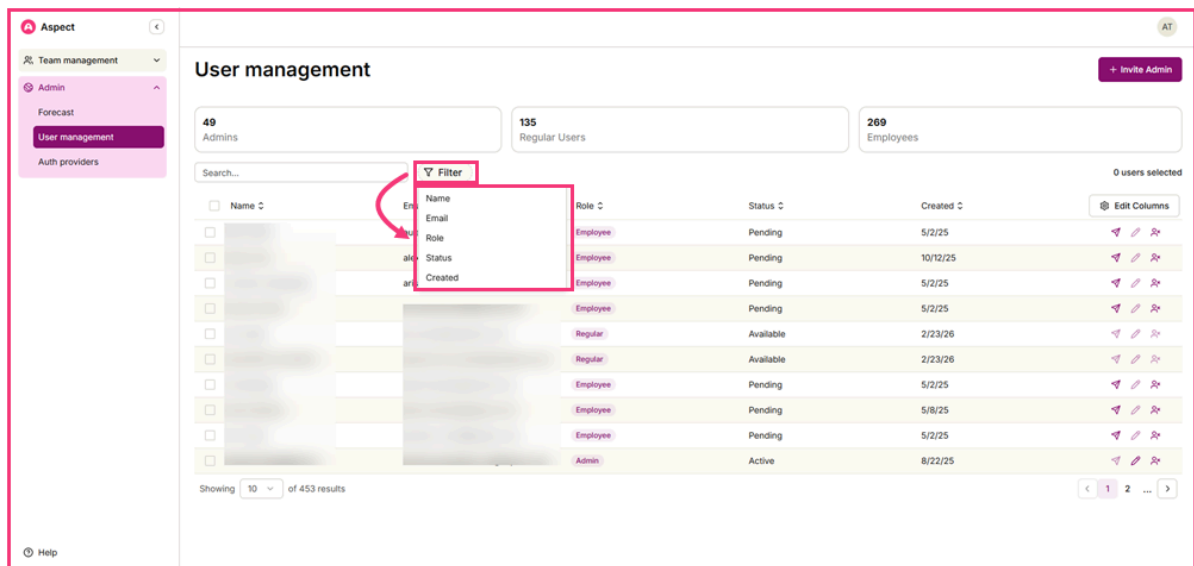


Figure 2-1

3. In the first drop-down menu, select a filtering option. Then enter your search criteria and click **Apply**. In this example, we selected **contains** and entered **Admin**.



The filtering menu options will change depending on the filter type you select. Name and Email filter types will only display the **equal to (=)** option. Role and Status types will display the options below. Created type will display options that relate to specific date ranges.

- When **contains** is selected, you can search for the criteria by entering one or more letters.
- When **equal to (=)** is selected, the search criteria must be an exact match.
- When **excludes (! =)** is selected, the criteria entered will be excluded from the search results.

The screenshot shows the 'User management' interface in Aspect. At the top, there are three summary boxes: '49 Admins', '135 Regular Users', and '269 Employees'. Below these is a search bar and a 'Filter' dropdown menu. The 'Filter' menu is open, showing a dropdown with 'contains' selected. Below the dropdown is a text input field containing 'Admin' and two buttons: 'Cancel' and 'Apply'. The main table below the filter shows a list of users with columns for Name, Email, Role, Status, and Created. The table is currently displaying 10 results out of 453. The 'Role' column shows various roles like Employee, Regular, and Admin. The 'Status' column shows Pending and Available. The 'Created' column shows dates like 5/2/25, 10/12/25, 2/23/26, and 8/22/25.

Figure 2-2

4. All users with Admin roles are now displayed. You can edit or remove the filtering options at any time.

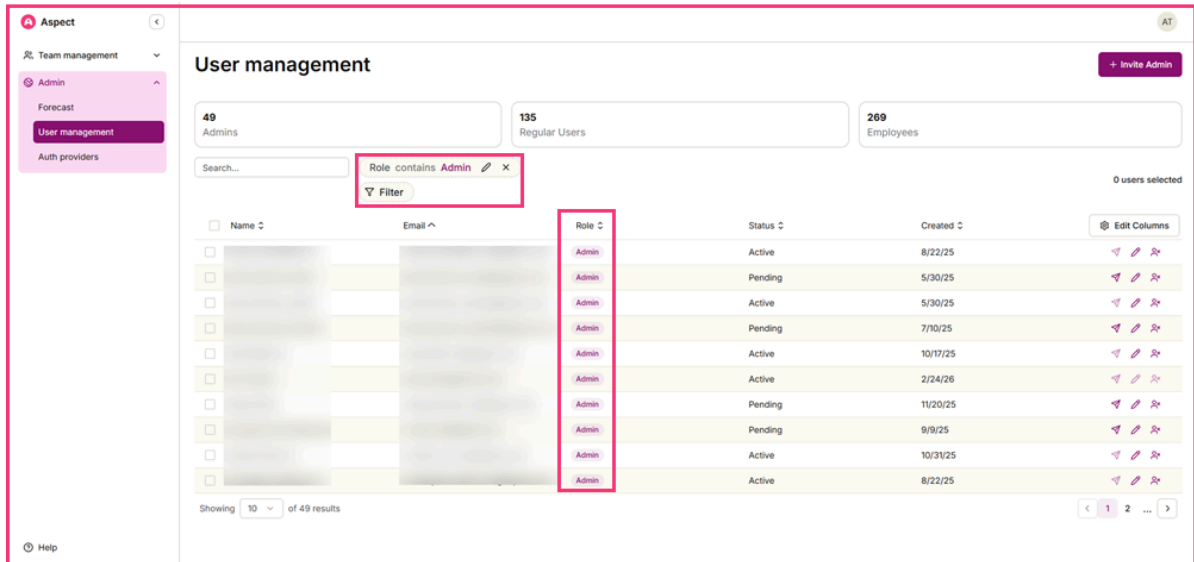


Figure 2-3

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▼ Admin: Edit user info



You can only edit user information for Admins. You must edit employee information in WFM.

1. Open the New Experience and log in.
2. Click **User management** and use the search or filtering options to locate the admin whose info you want to edit. You can also use the navigation buttons at the bottom of the page to browse through users.

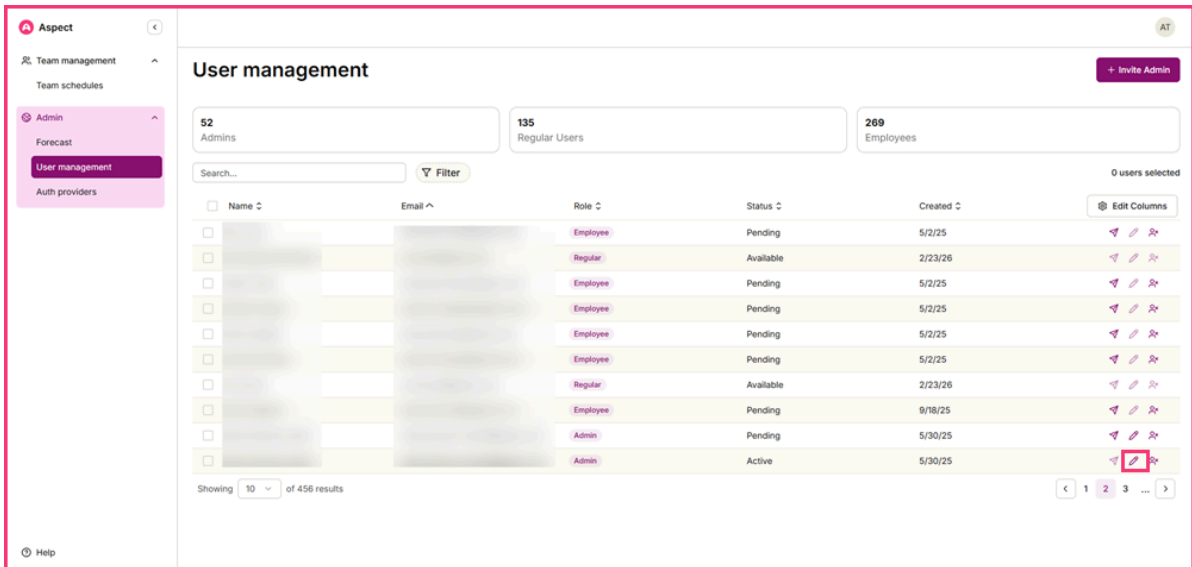


Figure 1-1

3. Make your edits to the user info and click **Update**. The changes will be automatically updated.

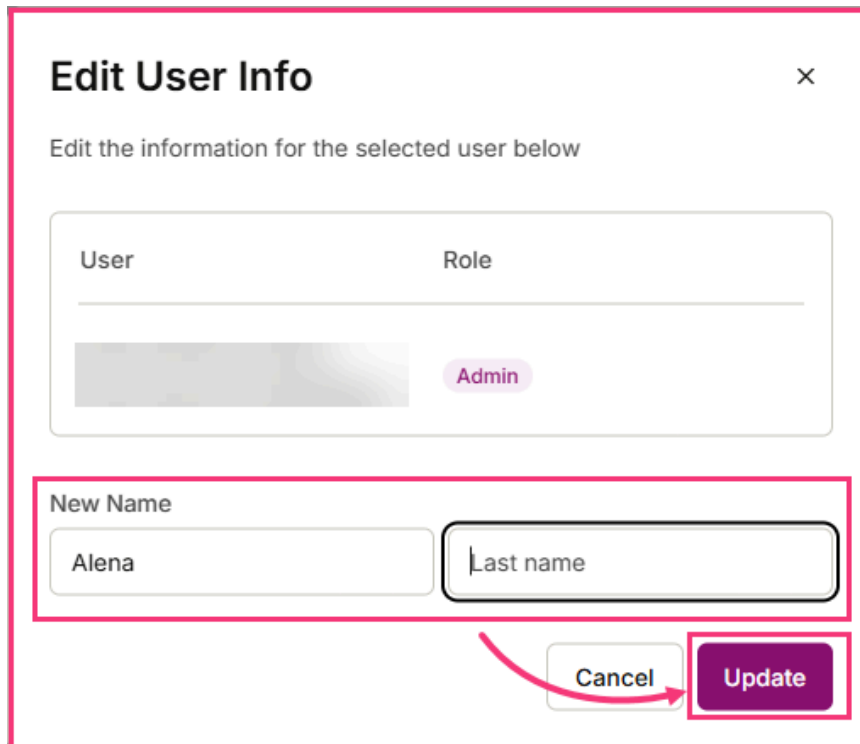


Figure 1-2

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▼ Admin: Check the status of a user

1. Open the New Experience and log in.
2. Expand **Admin**, click **User management** and use the search or filtering options to locate the user whose status you want to check. You can also use the navigation buttons at the bottom of the page to browse through users.
3. In the **Status** column, you can view the status of all users in your account. There are four possible statuses:
 - **Active:** The user has accepted the invite email and has an active account.
 - **Available:** The user has a WFM account but has not been invited to activate their New Experience account.
 - **Pending:** The user has been sent an invite email, but has not accepted the invite email and does not have an active account.
 - **Deactivated:** The user was activated but has been deactivated. They can be reactivated by resending an email invitation.

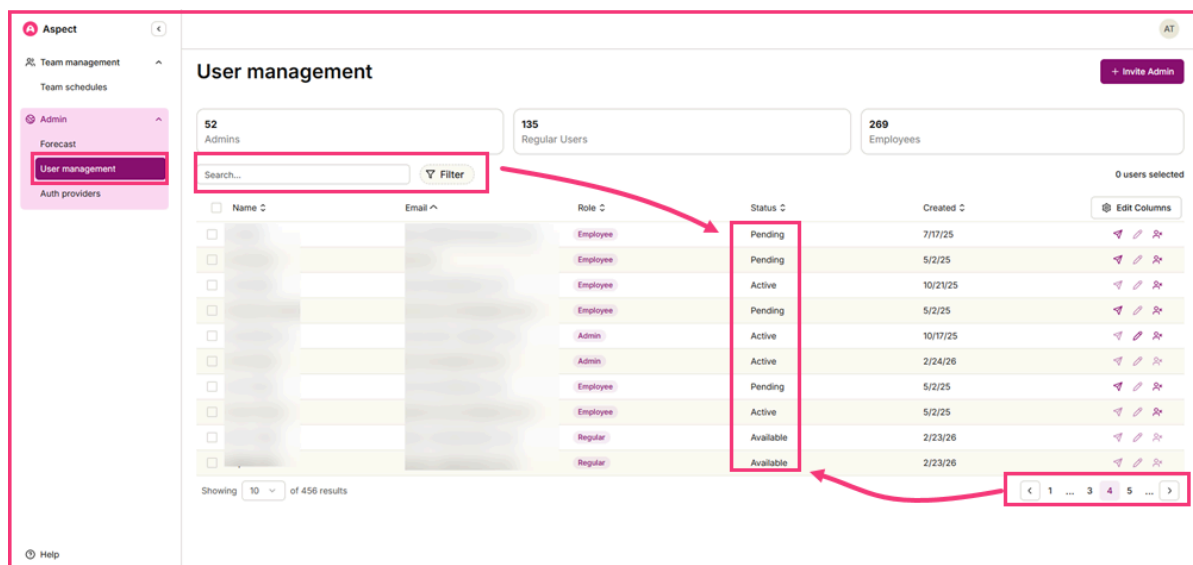


Figure 1-1

▼ Admin: Resend an email invitation



You can only resend email invites to users in **Pending** or **Deactivated** status.

Federated tenants do not have the option to resend email invitations.

1. Open the New Experience and log in.
2. Expand **Admin** and click **User management**, then use the search or filtering options to locate the user you want to resend the invitation to. You can also use the navigation buttons at the bottom of the page to browse through users.
3. In the row of the user, click the **arrow** icon to resend the email invitation.

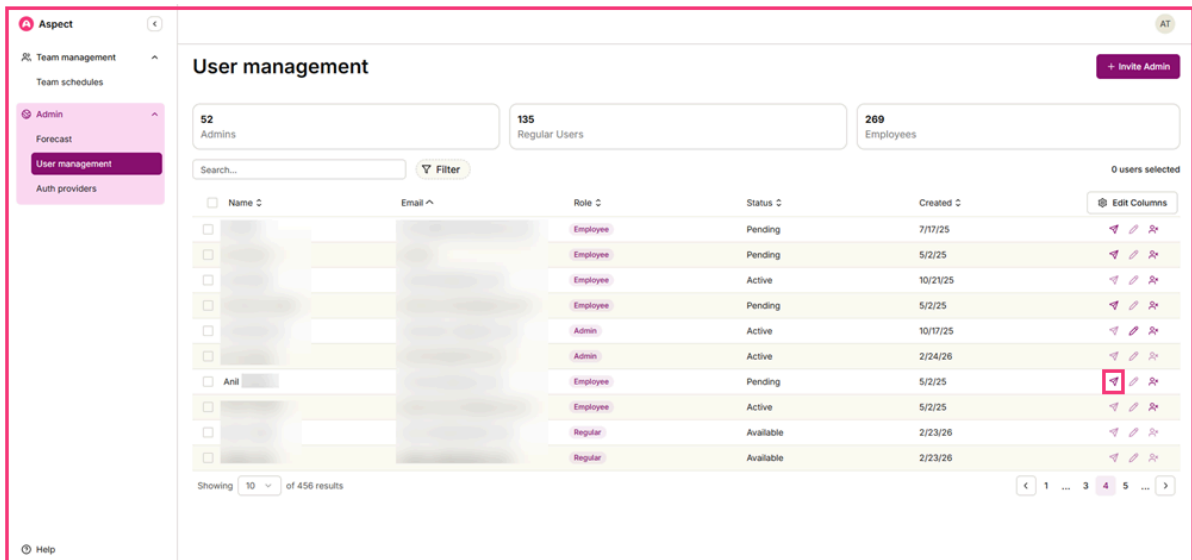


Figure 1-1

4. Click **Resend**.

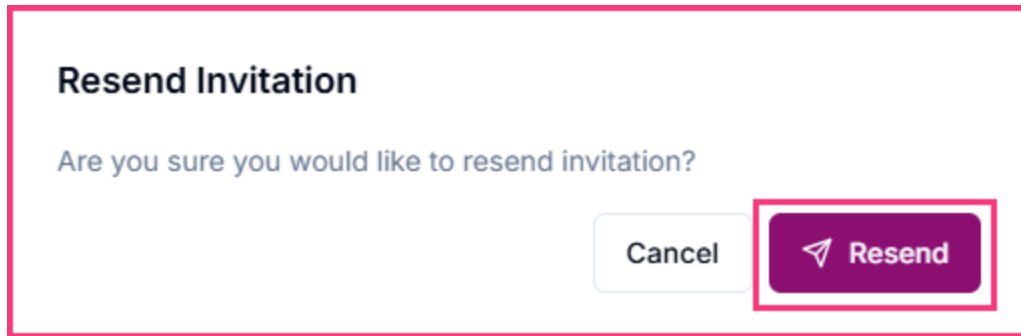


Figure 1-2

[Back to top](#)

▼ Admin: Delete or deactivate a user from your account



Deleting or deactivating Employees must be done in WFM to comply with GDPR requirements. You can not delete an Employee from the New Experience.

Follow the steps below to delete or deactivate an Admin. You can reactivate a deactivated user at any time, but deletion is permanent.

1. Open the New Experience and log in.
2. Expand **Admin**, click **User Management** and use the search or filtering options to locate the Admin you want to delete or deactivate from the account . You can also use the navigation buttons at the bottom of the page to browse through users.
3. Click the **Remove user** icon.

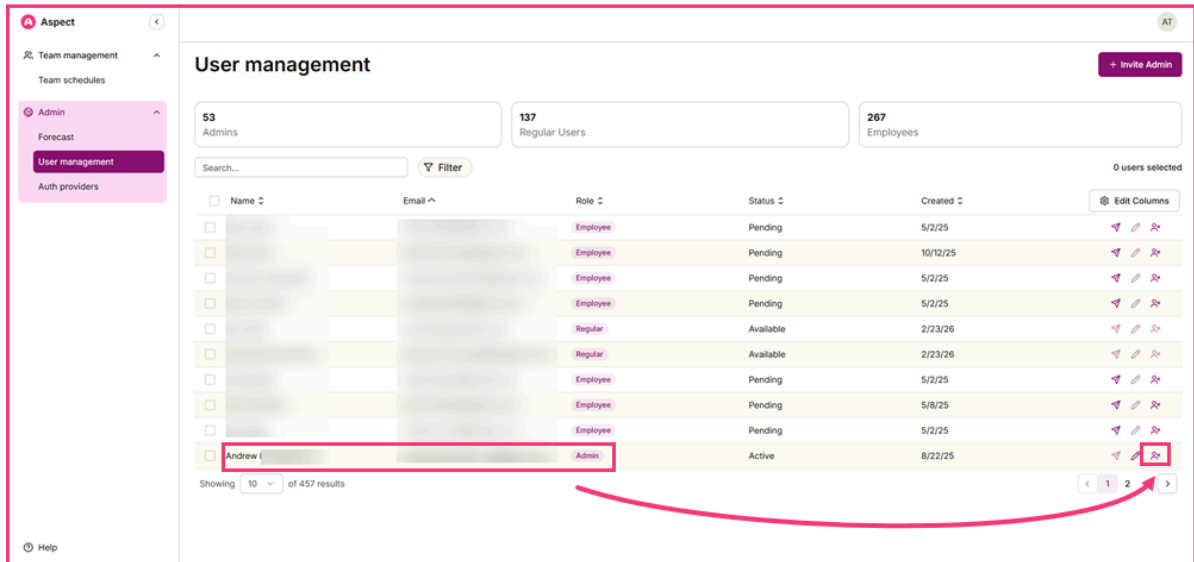


Figure 1-1

4. Click **Delete** or **Deactivate**.



Deleting a user is permanent.

You can reactivate a deactivated user at anytime by resending an email invitation.

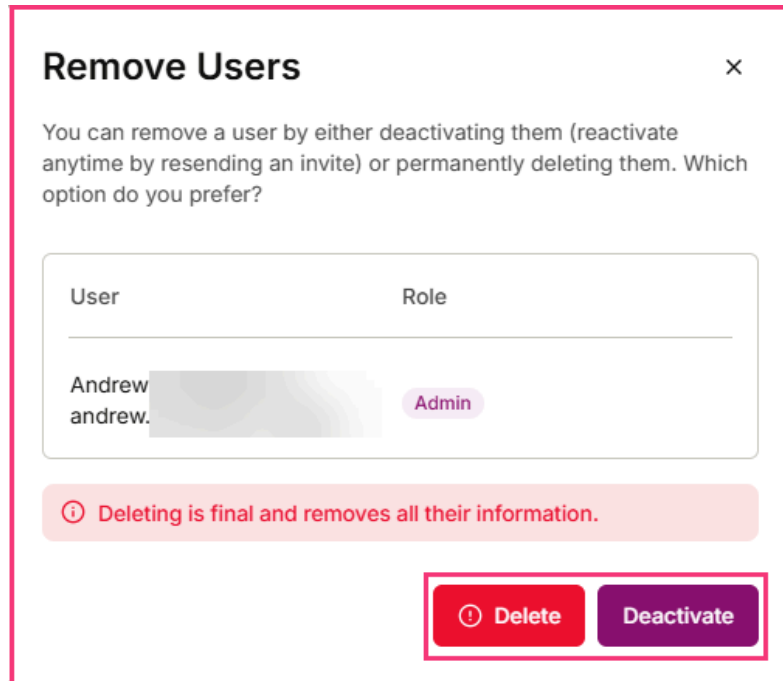


Figure 1-2

[Back to top](#)

▼ Admin: How to use the Forecast Dashboard (Beta)



The Forecast Dashboard is currently in beta.

Overview

The latest version of the Forecast Dashboard adds comparison capabilities that let managers and supervisors overlay and compare AI (Intelligent) forecasts, classic WFM forecasts, and actual volume outcomes in a single visualization.

This gives New Experience users better validation (closing the gap with WEM's export functionality) and delivers the long-requested in-platform actuals comparison. It eliminates the need to export data or switch tools to validate forecast accuracy.

The forecast horizon has been extended from 4 weeks to 10 weeks, so planners can rely on Aspect Intelligence earlier in their planning cycle, not just as a final validation step.

The Forecast Dashboard provides three ways to view and compare forecast data:

- The **Intelligent** model displays forecasts using AI-generated data
- The **Classic** model shows user-created WFM forecasts
- The **Actual** data retrieves and displays actual historical volume data for the selected forecast group and time range to serve as the ground truth for comparison.

Click a link below to see more information on the Forecast Dashboard:

- [Requirements](#)
- [Intelligent Forecasts](#)
- [Classic Forecasts](#)
- [How to use the Forecast Dashboard](#)

Requirements to Perform Call Volume Forecasting

- You must be onboarded to the New Experience and AI platforms.
- You must create an inbound or outbound **Voice** Forecast group in WFM and configure it with a name and time zone.
- The forecast group must have associated Call Volume ACD data.
 - Optionally, the forecast group can be configured with open hours and past or future holiday factors.
- Each forecast group requires a minimum of 280 days of historical data.

Intelligent Forecasts



Intelligent model forecasts provide an auto-generated forecast solution for each WFM forecast group and update daily. They save time for workforce analysts and planners by generating updated forecasts using Aspect's predictive AI model.

Currently, the Intelligent model displays only the **Volume** Type Forecast. These forecasts are created automatically and update daily at midnight UTC, covering a ten-week period.

You can select one or more Intelligent forecasts to compare with Classic forecasts, or with Actual Data. The latest Intelligent forecast will be shown at the top of the table.

1. Expand **Admin**, click **Forecast**.

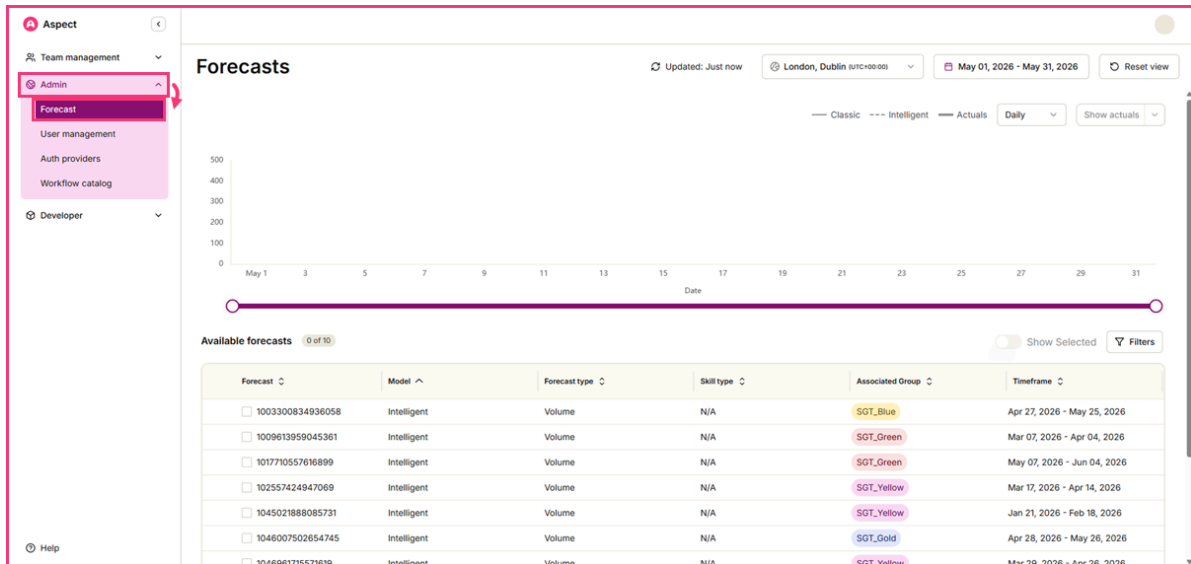


Figure 1-1

2. To view Intelligent forecasts, click **Filters**, expand **Model** and select the checkbox next to **Intelligent**. You can also click the top of the **Model** column to sort forecasts by model type.

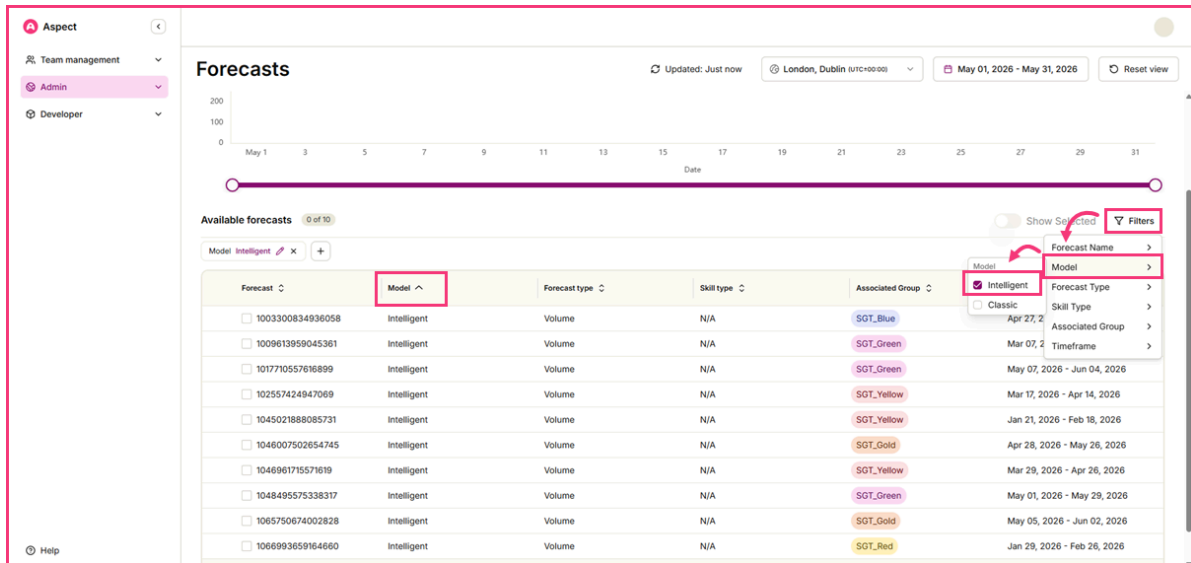


Figure 1-2

3. Select the checkbox next to the Intelligent forecast you want to view. The graph displays AI-generated data.
5. See more information on [how to manage the visual display settings for your forecasts.](#)

Classic Forecasts



Classic forecasts displayed in the dashboard have been previously generated in Workforce Management (WFM). Users must generate forecasts in WFM prior to viewing them in the Forecast Dashboard. Classic forecasts are generated based on actual load history from Workforce Management (WFM) for each part of the day, calculating the required load to handle work during these periods.

There are three types of Classic forecasts available: **Call Volume**, **Workload**, and **Staffing**.

You can select one or more Classic forecasts to compare with Intelligent forecasts, or with Actual Data. The latest Classic forecast will be shown at the top of the table.

1. Expand **Admin**, click **Forecast**.

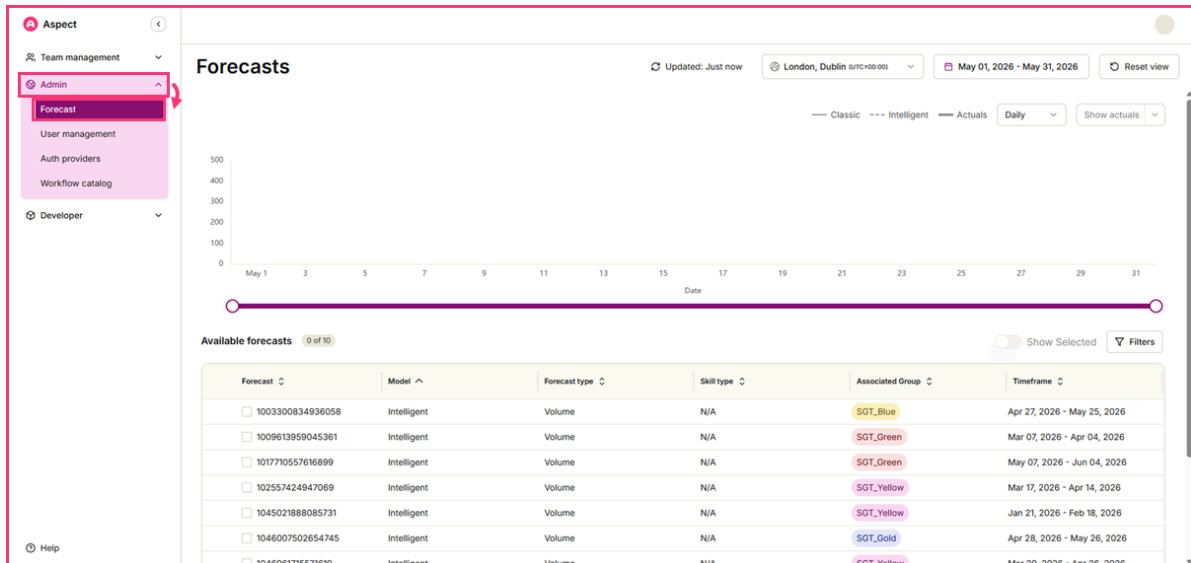


Figure 2-1

- To view Classic forecasts, click **Filters**, expand **Model** and select the checkbox next to **Classic**. You can also click the top of the **Model** column to sort forecasts by model type.

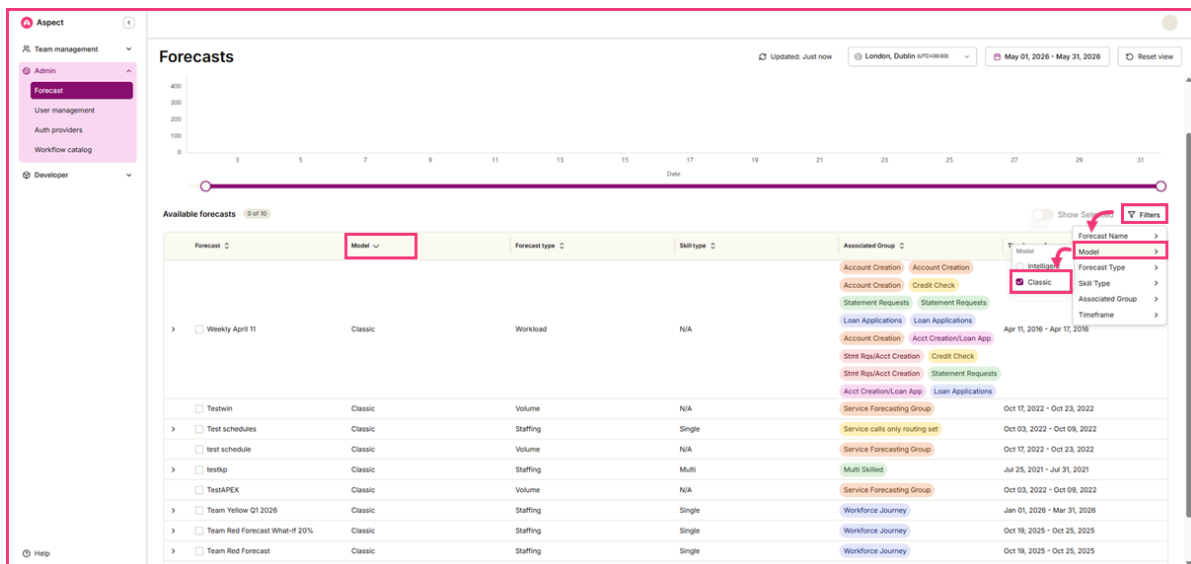


Figure 2-2

- Select the checkbox next to the Classic forecast you want to view. The graph displays AI-generated data.

4. See more information on [how to manage the visual display settings for your forecasts](#).

Use the Forecast Dashboard



The Forecast Dashboard provides three ways to view and compare forecast data:

- The **Intelligent** model displays forecasts using AI-generated data
- The **Classic** model shows user-created WFM forecasts
- The **Actual** data retrieves and displays actual historical volume data for the selected forecast group and time range to serve as the ground truth for comparison.

1. Expand **Admin** and click **Forecast**.

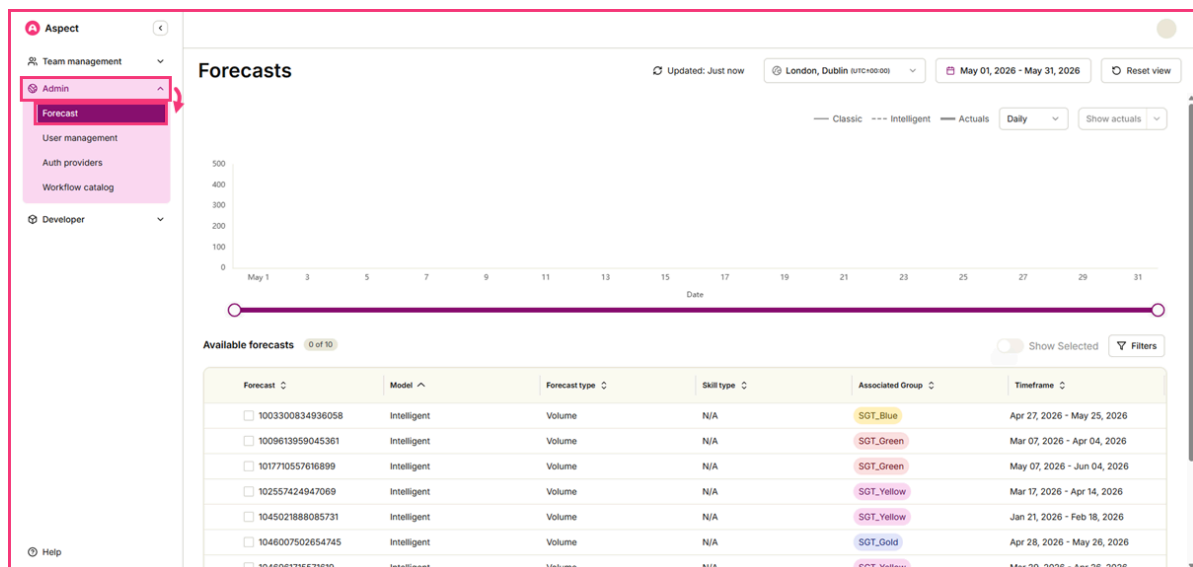


Figure 3-1

2. In the **Available Forecasts** table, select one or more Intelligent or Classic forecasts to view or compare.

- Click **Filters** and select one of the menu options to filter for a specific forecast, or click the top of each column to sort the forecasts.

- Each column in the Forecast table displays the following details about the forecast: **Forecast Name**; **Model**; **Forecast Type**; **Skill Type**; **Associated Group**; **Timeframe**.

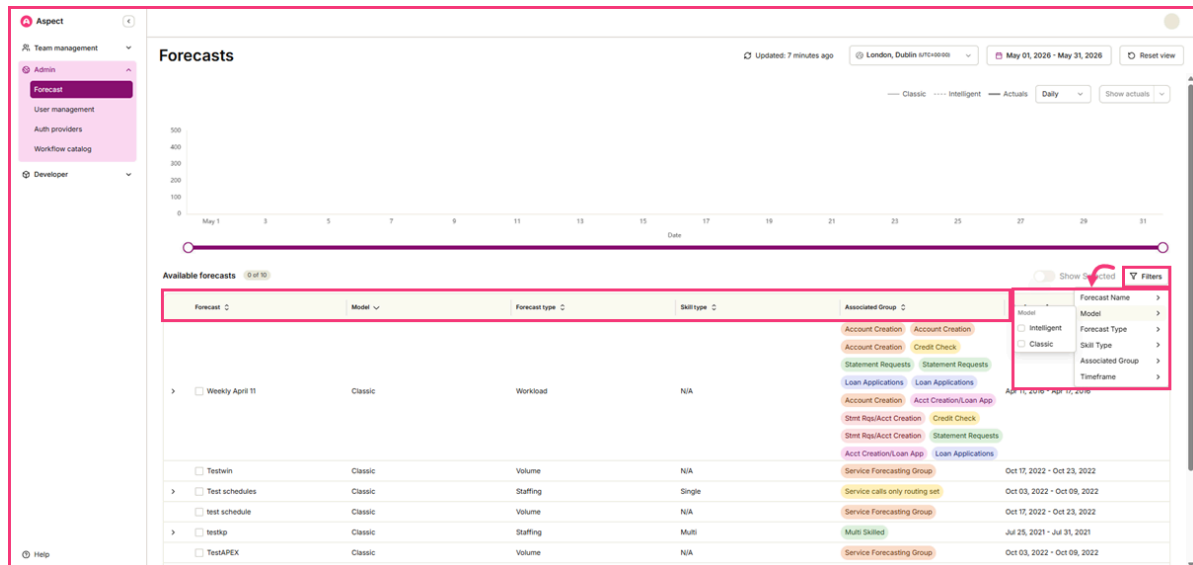


Figure 3-2

3. The graph(s) for the selected Forecasts will display the following:
 - a. The forecast **name** and its associated **type**.
 - b. **Regional Timezone menu** - allows you to select the regional timezone.
 - c. **Date Picker** - lets you select your desired start and end dates. Days within your selected timeframe will be highlighted.
 - d. **Forecast Graph** - a visual representation of the forecast data for the selected date range.
 - e. **Zoom slider** - lets you zoom in and out of the date range on the forecast graph.

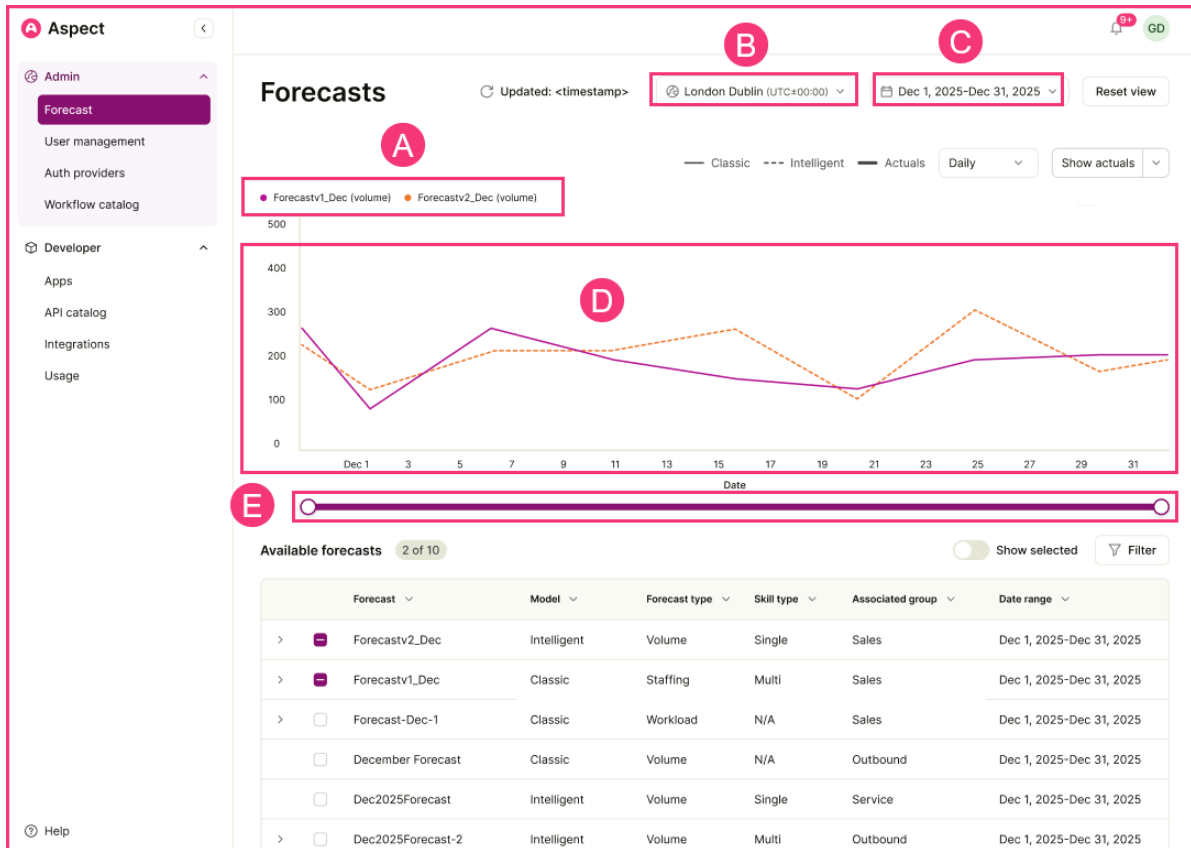


Figure 3-3

4. Click **Show actuals** and select the checkbox next to a Forecast to view and compare the actual data from the date range.

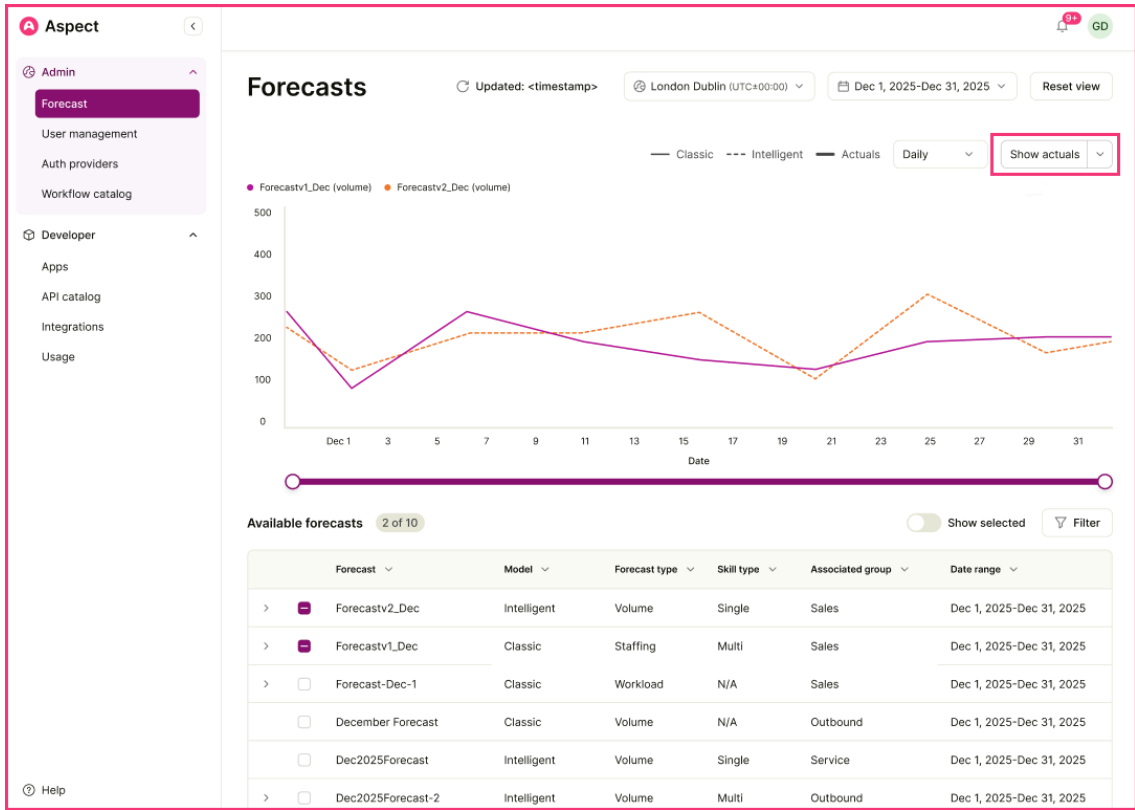


Figure 3-4

- The Actuals data will be displayed. Click **Hide Actuals** to remove the Actuals data display.

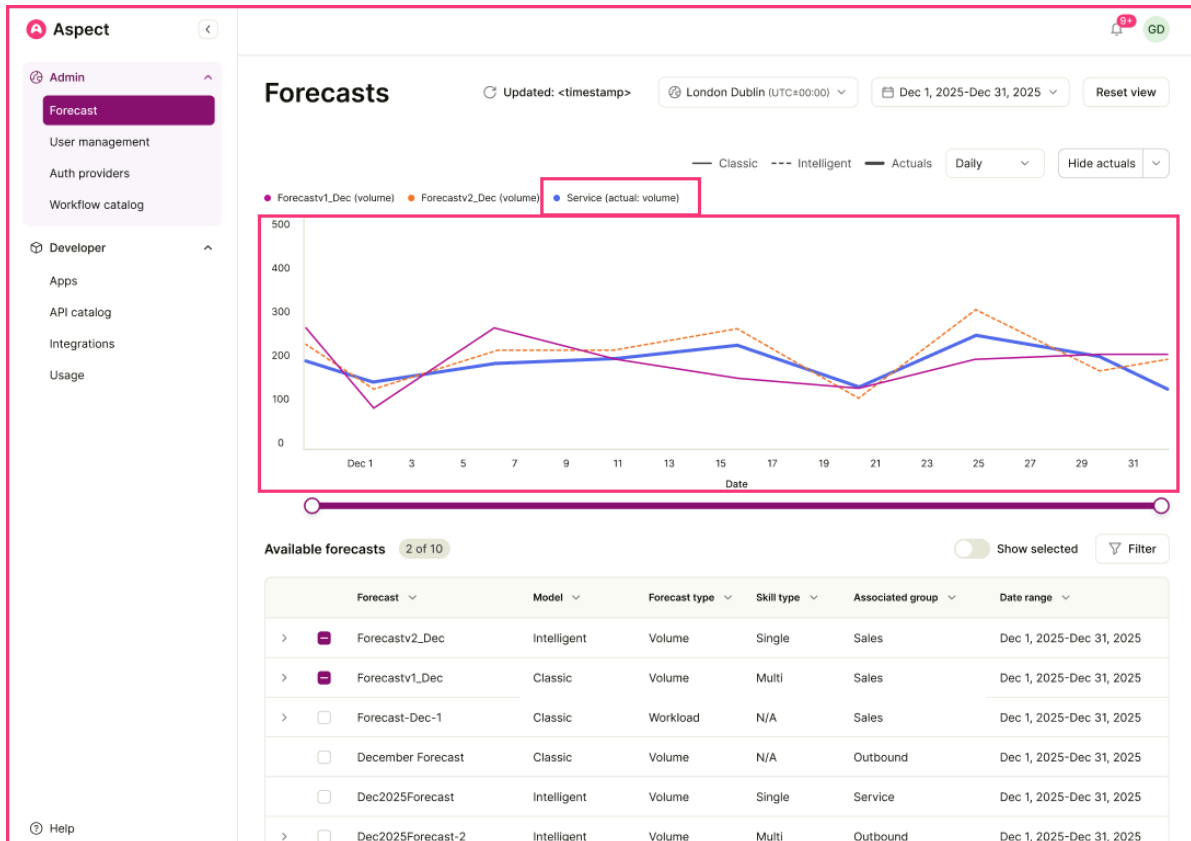


Figure 3-5

- To change the interval view, select **Intraday** or **Daily** to display data by time interval or as a full-day view. Hover your mouse over any point on a forecast graph to see more details.

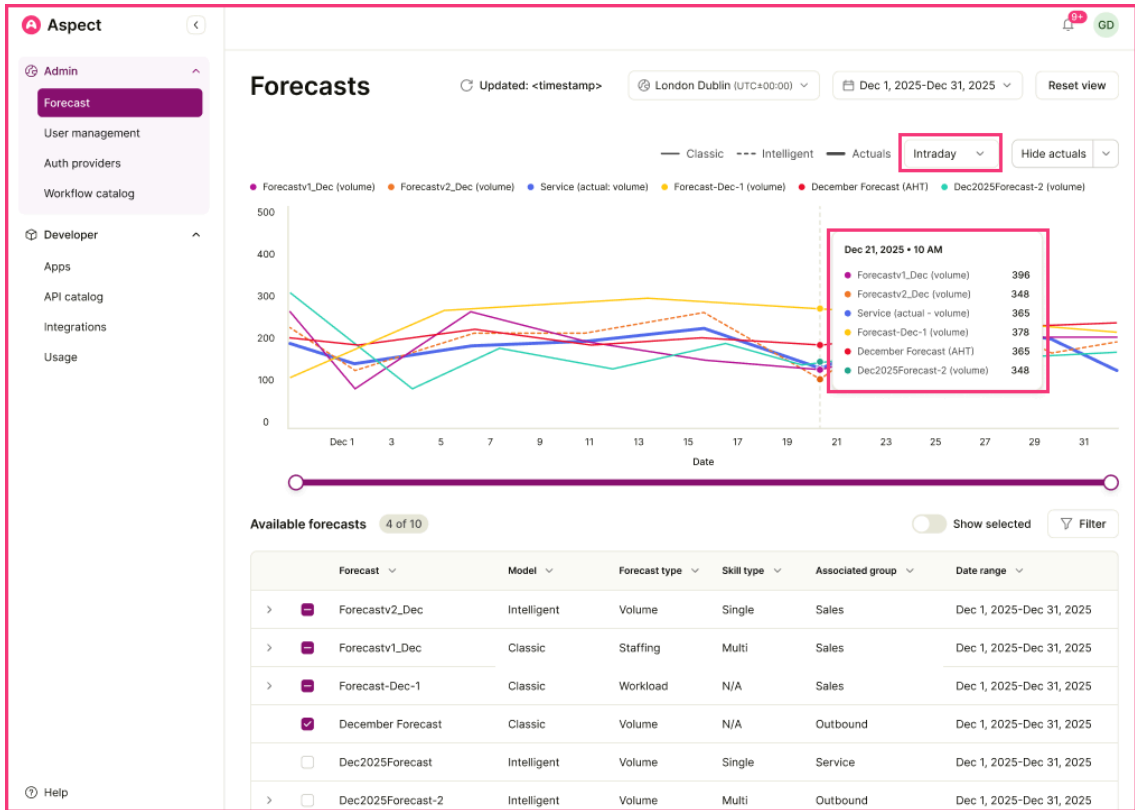


Figure 3-6

- For Classic forecasts with multiple data series, expand the dropdown menu next to the forecast and select the checkbox for an option to show or hide specific elements in the graph.

Each element in the Classic forecast display is color-coded to match its representation in the forecast line graph for easy identification.

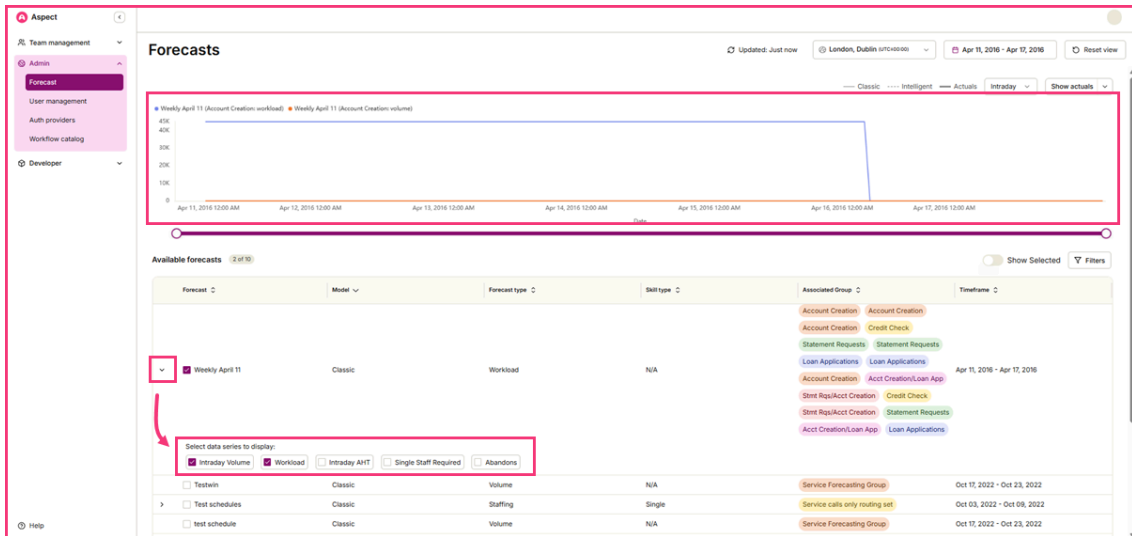


Figure 3-7

[Back to top](#)

▼ Admin: View a team or employee schedule

- [Select team or employee schedule to view](#)
- [Date Navigation and Time selection](#)
- [Schedule View Selection](#)

Overview

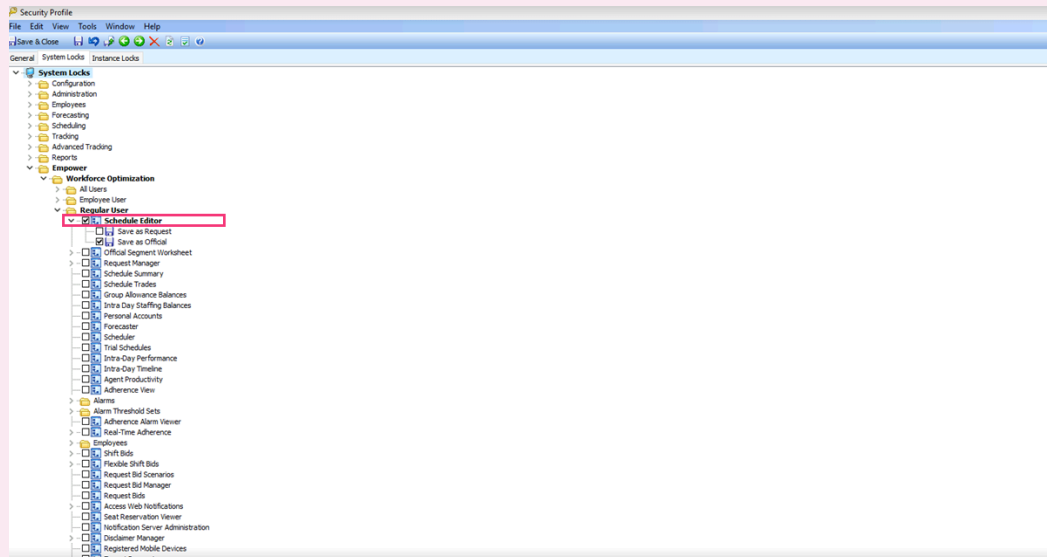
The Team Schedule View view provides comprehensive schedule visibility for Admins and Regular users to effectively manage their teams.

As an Admin or Regular user, you can view your team's schedules to confirm who is working and when. You can see detailed information about each employee's schedule, including their assigned work.

You can view multiple employee schedules simultaneously to compare and review your team's work at a high level. Each row represents an employee, and each column represents a time period.



To enable schedule viewing for Regular users, update the user's Security Profile in WFM to enable the "Schedule Editor" security lock. Supervisor access for this feature will be enabled at a later date.



Select Team or Employees Schedule to view

1. Open the New Experience and log in.
2. Expand **Team management**, click **Team schedules** and click **Select Employee Schedules.**

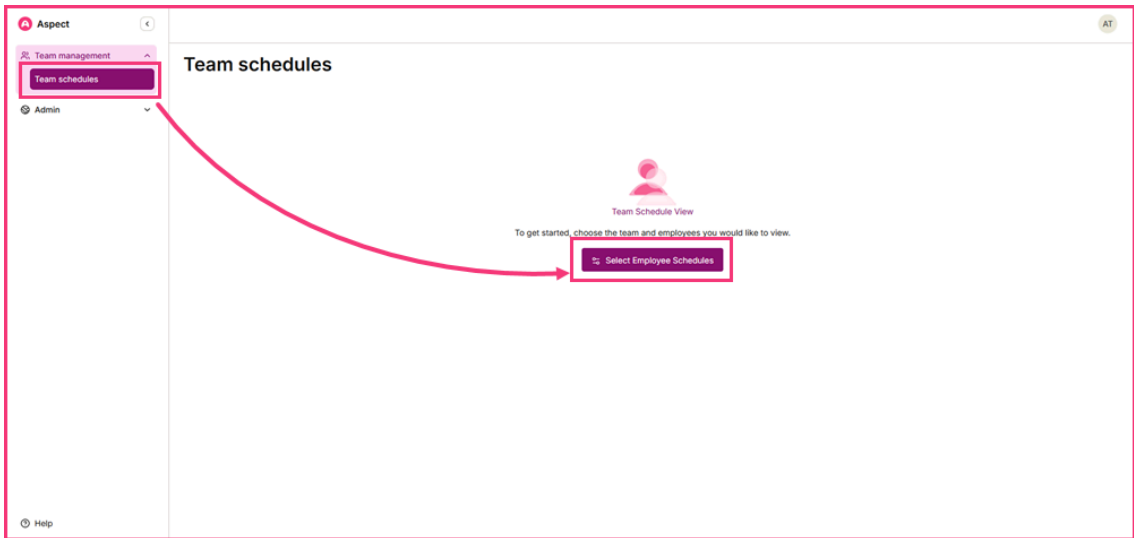


Figure 1-1

2. Click **Groups** to select the groups whose schedules you want to view, then click **Next**.

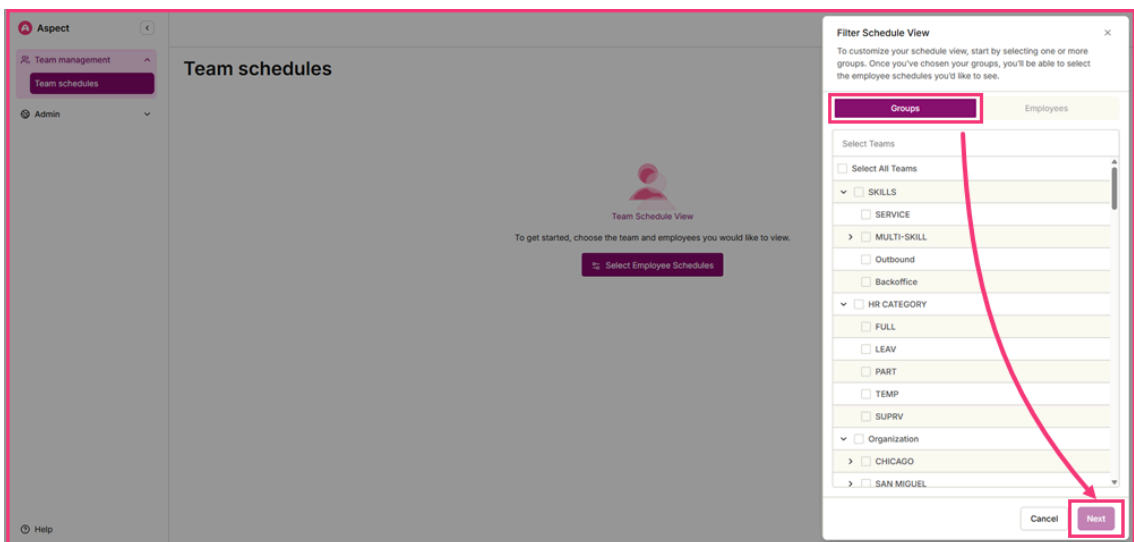


Figure 1-2

3. Click **Employees** to select the employees whose schedules you want to view, then click **Update View**.

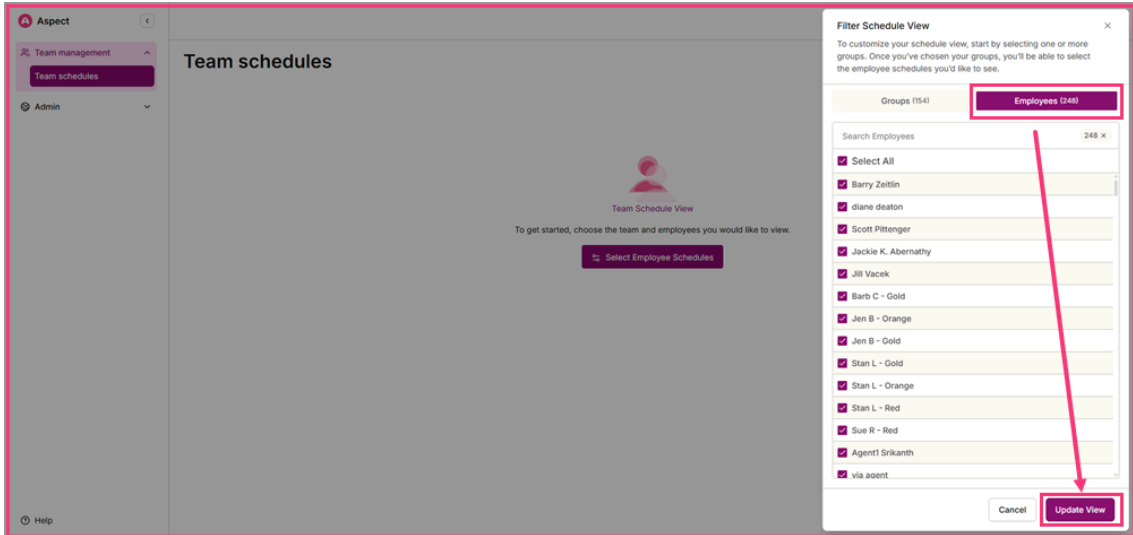


Figure 1-3

4. The team schedules for the selected employees are displayed.

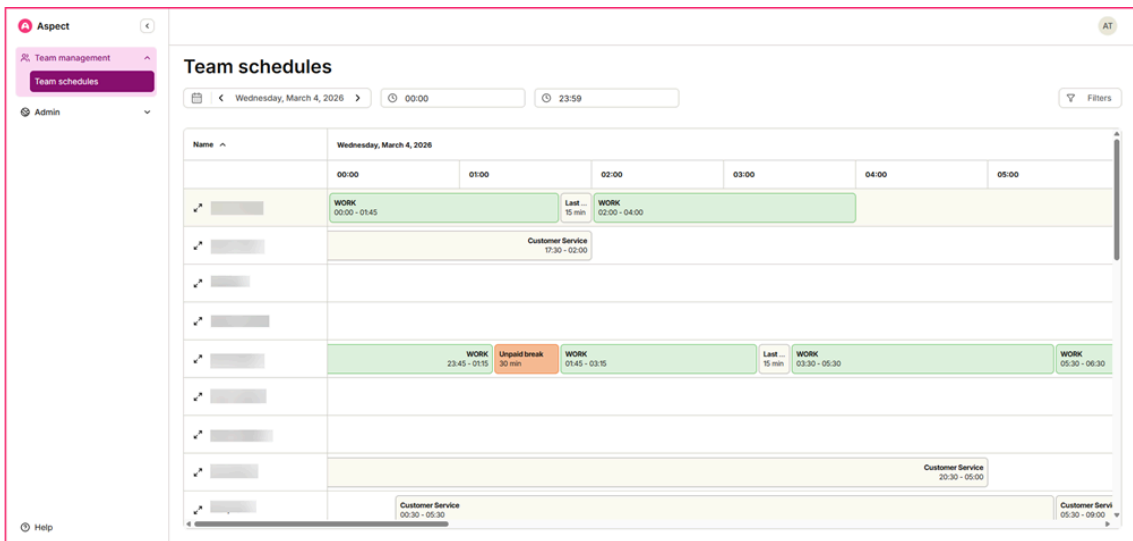


Figure 1-4

5. To view specific employees instead of all team members, click **Filter** in the top right and select the employees whose schedules you want to display.



The New Experience receives the latest employee group details from the WFM system.

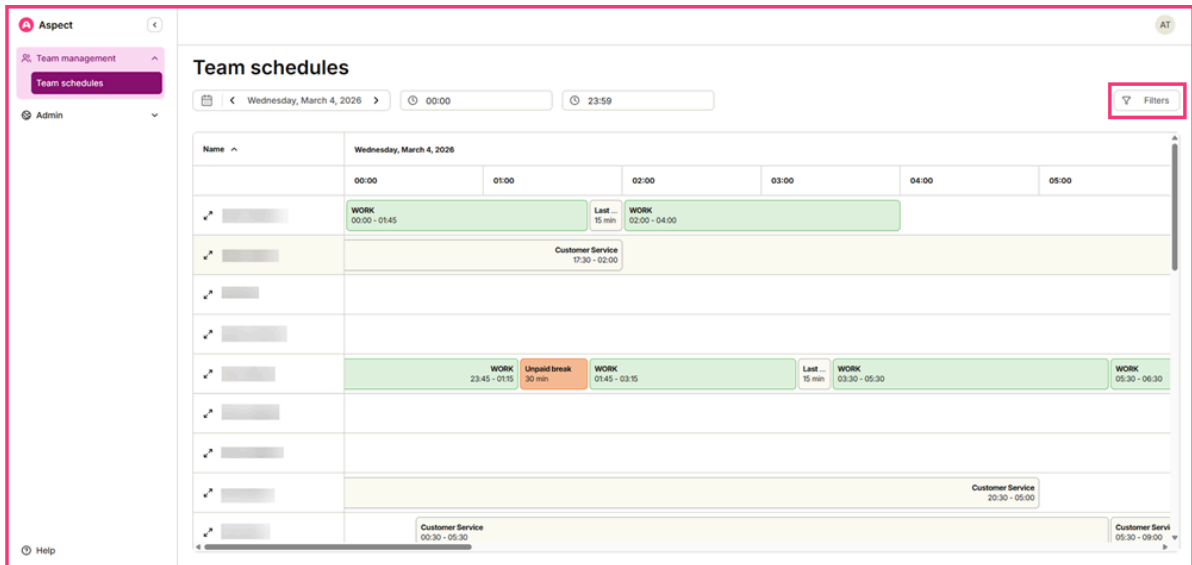


Figure 1-5

Date Navigation and Time selection

Admins can use the date picker to navigate to different dates and view historical and future schedules for their team.

1. Click the calendar icon to select a date and view the team schedule for that day. Use the time selector to display schedules within a specific time period.

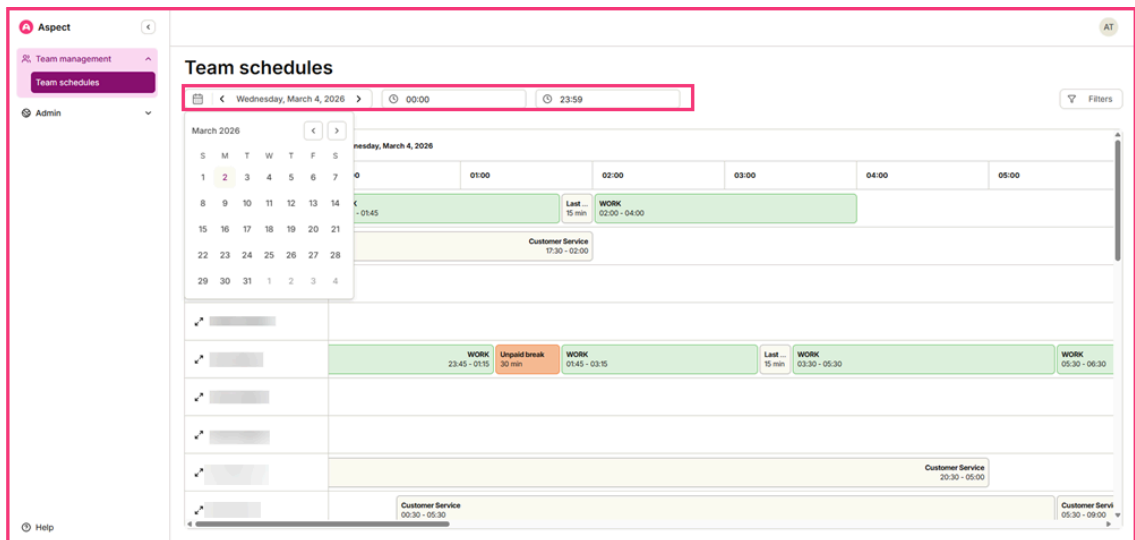


Figure 2-1



Time Range across Multiple Dates

Schedules span multiple days based on the selected time range. For example, selecting 7pm to 7am displays rollover shifts across two days.

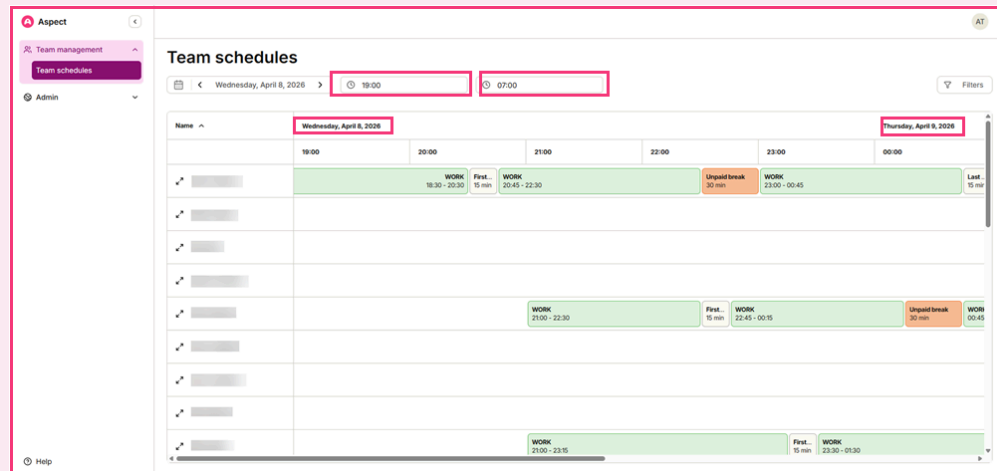


Figure 2-2

Schedule View Selection

Admins can expand an employee's schedule row to view detailed information about individual activities, including activity types, durations, containers, and segments.

1. Click the arrow next to the employee's name to expand or collapse the row and view detailed activity information.

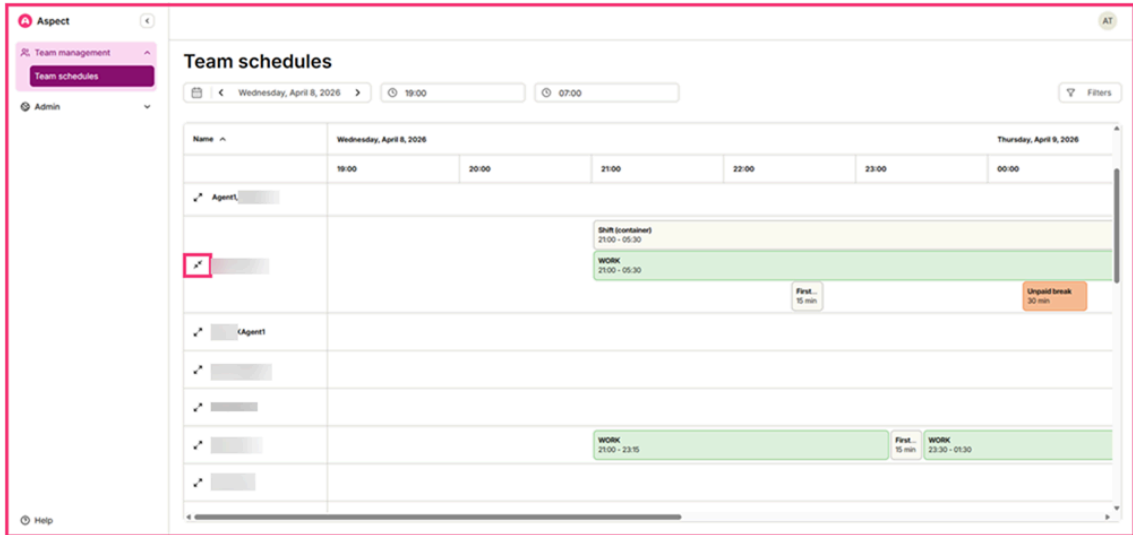


Figure 3-1

2. Hover over a schedule to see more details.

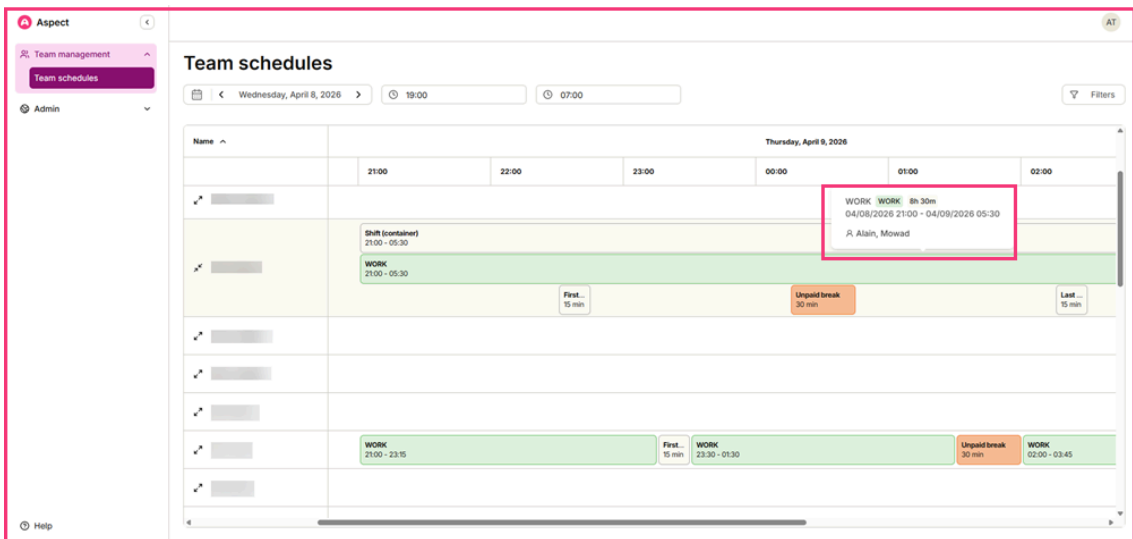


Figure 3-2

[Back to top](#)

▼ **Admin: Edit a team or employee schedule**



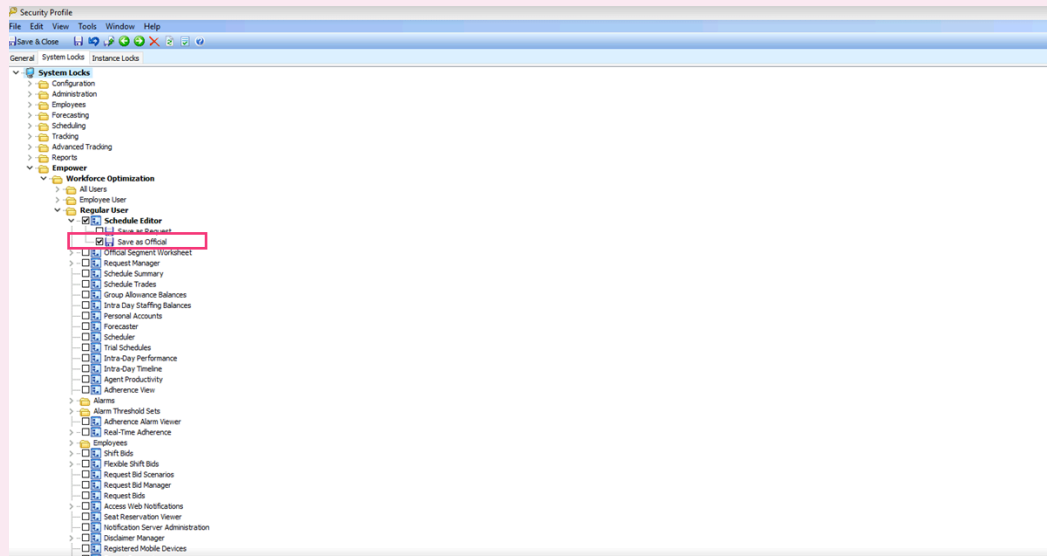
The Team Schedules view presents a modern, streamlined interface that lets administrators view, create and edit employee schedules quickly and confidently.

It features drag-and-drop scheduling, advanced filtering with reusable presets, and customizable workspaces designed to reduce clicks, eliminate repetitive steps, and improve clarity.



Schedule editing is available to Admins and Regular users with the appropriate permissions in WFM.

To enable schedule editing for Regular users, update the user's Security Profile in WFM to enable the "Save as Official" security lock. Supervisor access for this feature will be enabled at a later date.



1. Open the New Experience and log in.
2. Expand **Team management**, click **Team schedules** and click **Filter** on the right side of the screen.

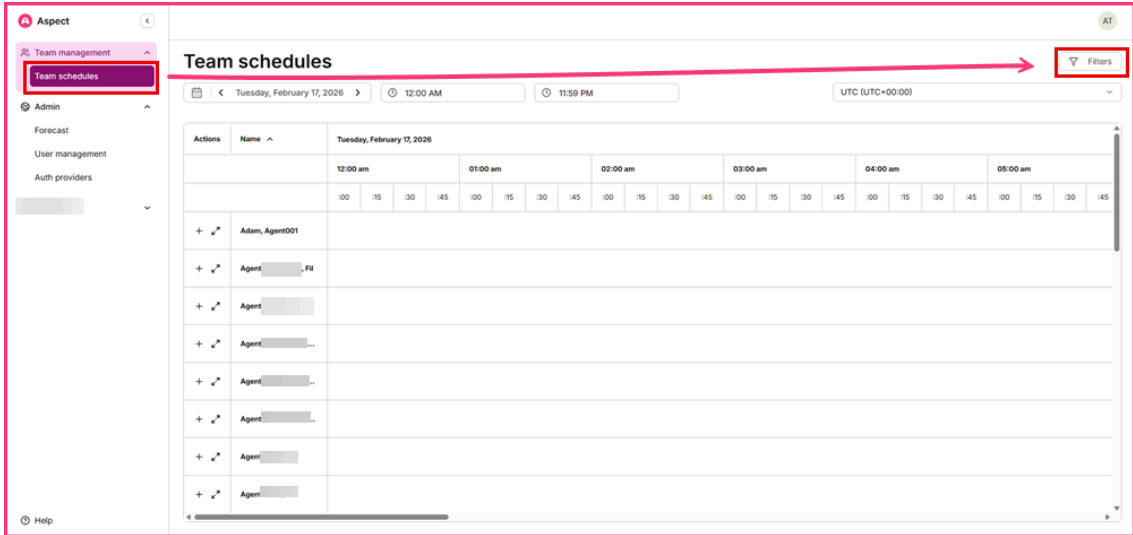


Figure 1-1

3. Select specific **Groups** and **Employees**.

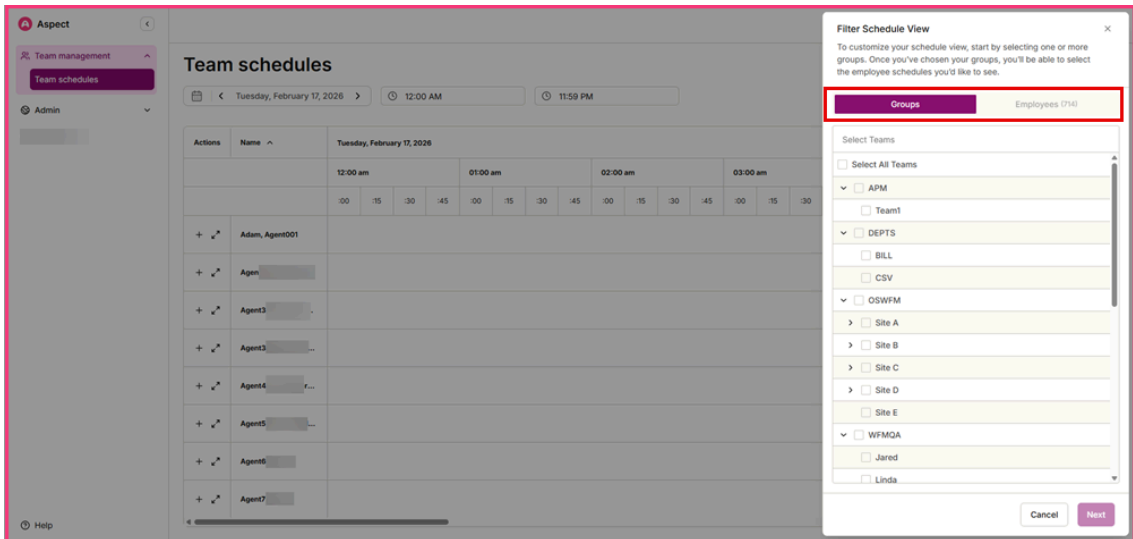


Figure 1-2

3. Select the date and time to view the schedule timeline. Click the arrows to expand individual employee rows for detailed activity information.

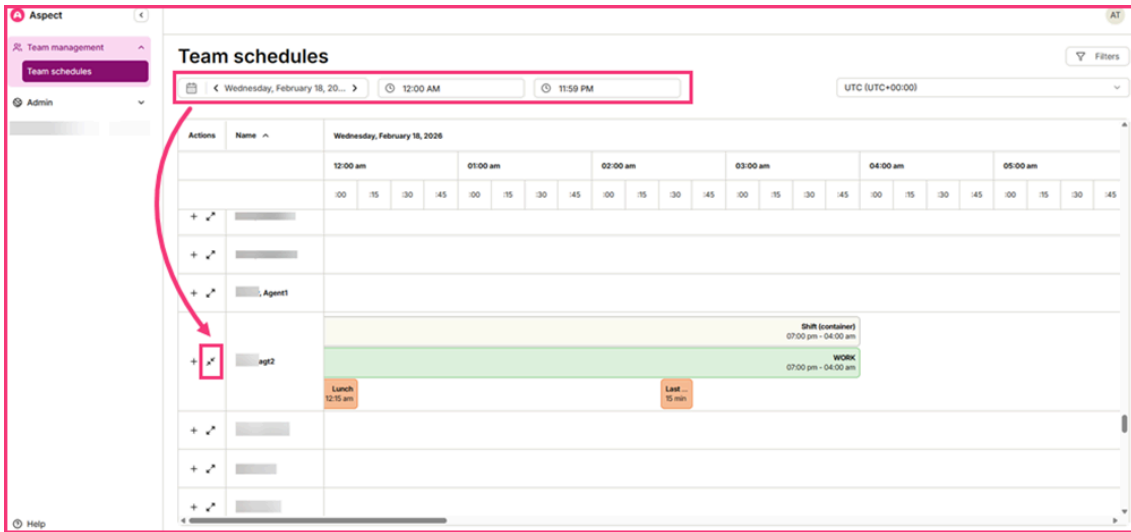


Figure 1-3

4. Drag and drop the schedule component to the desired time slot.

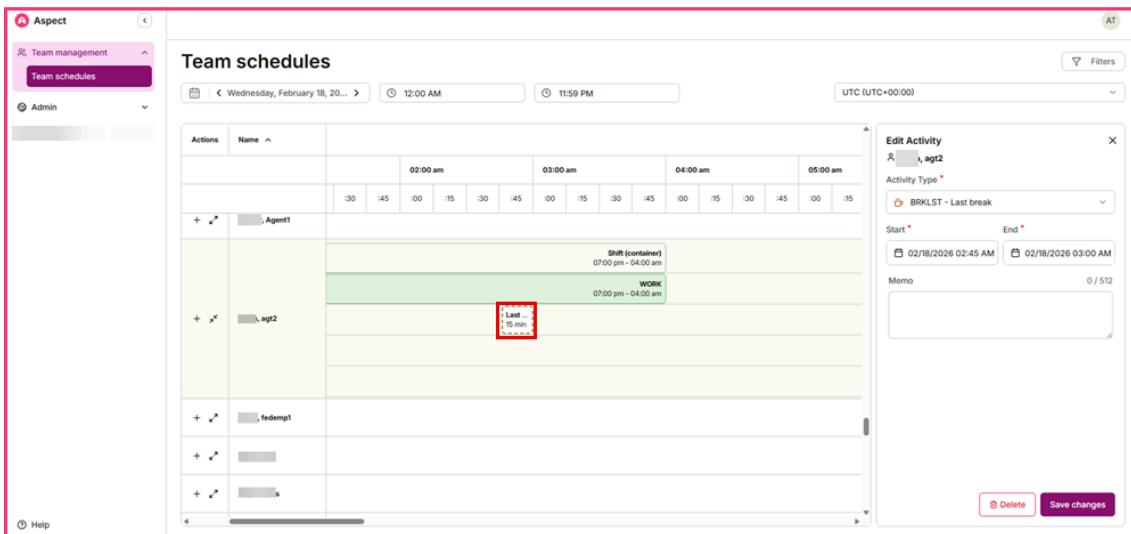


Figure 1-4

5. The side panel displays with the updated time and date. You can also change the time directly in the **Edit Activity** panel. Fill **Memo** if needed. Click **Save changes** to apply your changes.

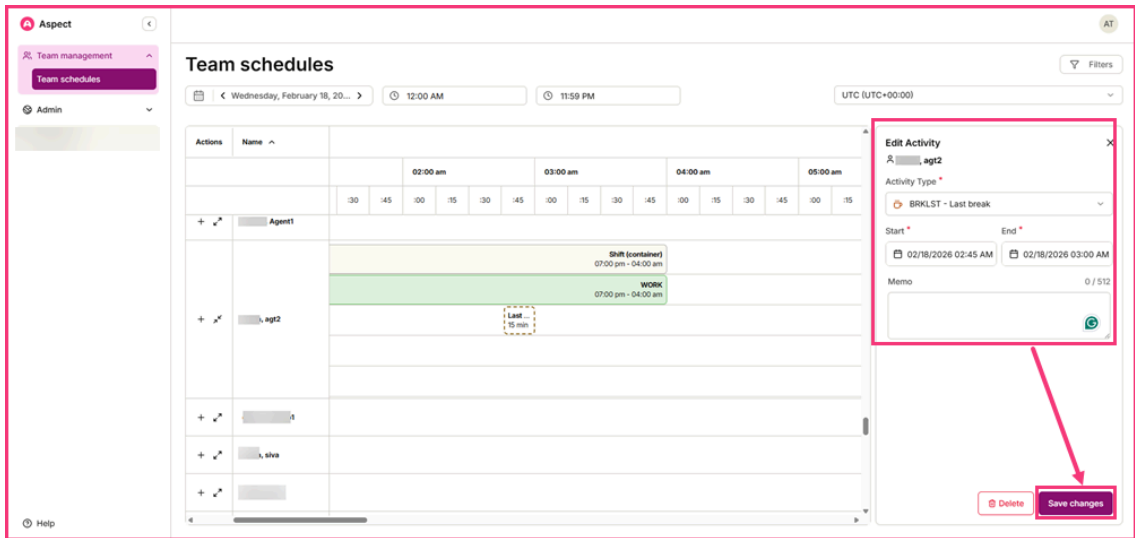


Figure 1-5

5. If needed, you can **Delete** the schedule edit.

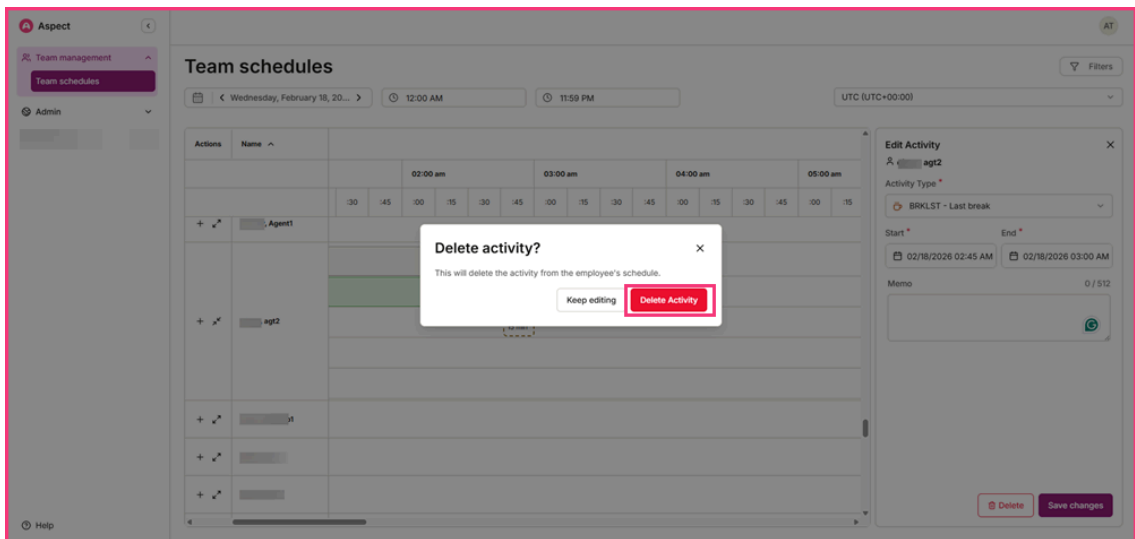


Figure 1-6

6. Click **Review changes**.

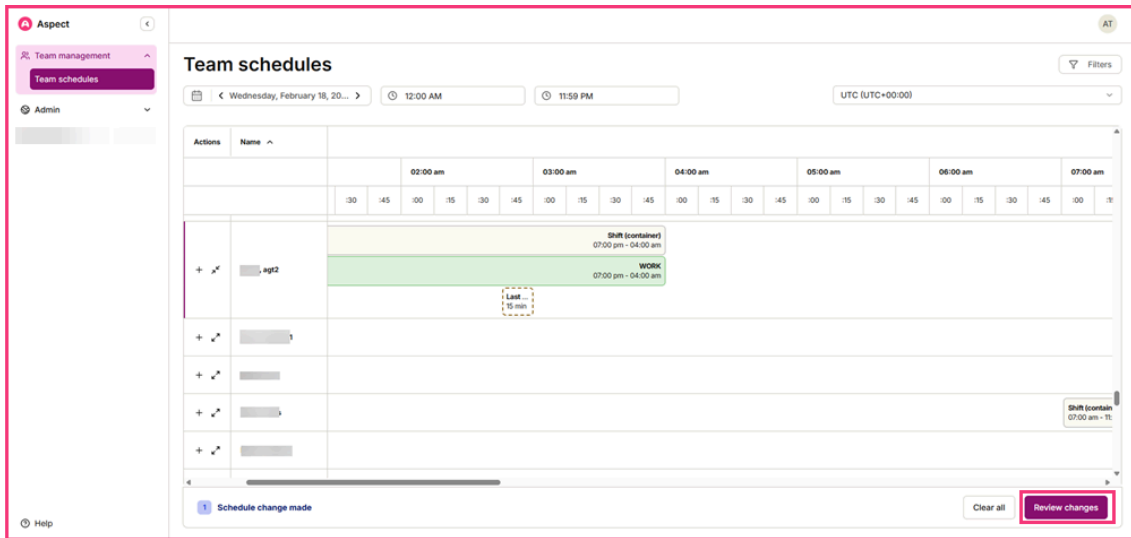


Figure 1-7

- Any violations will be listed, allowing you to edit the schedule to correct them.



Click **common scheduling rules** to view them if needed.

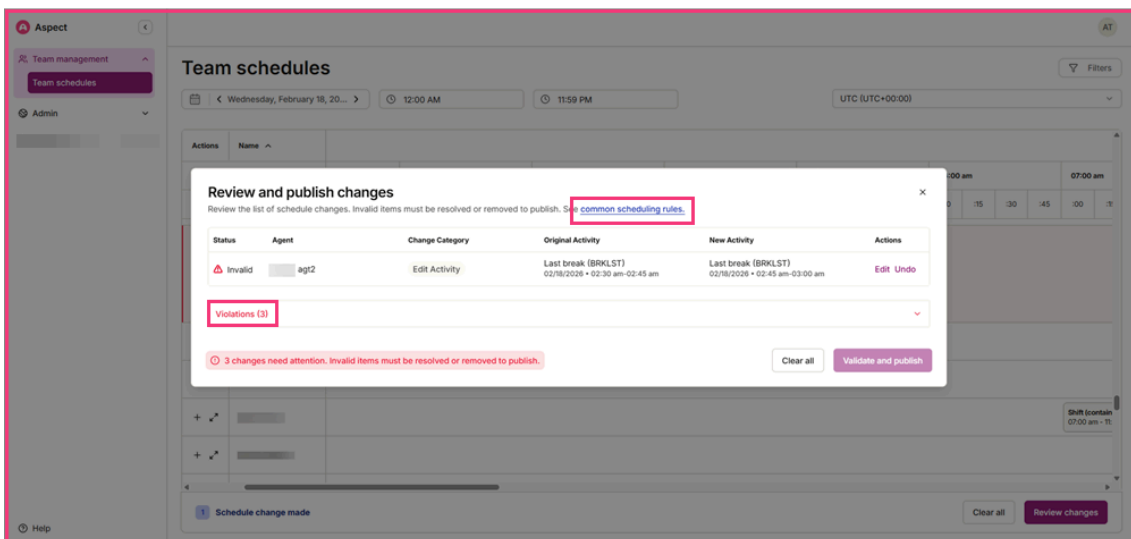


Figure 1-8

- Select **Edit** to make changes to the schedule and correct the violations.

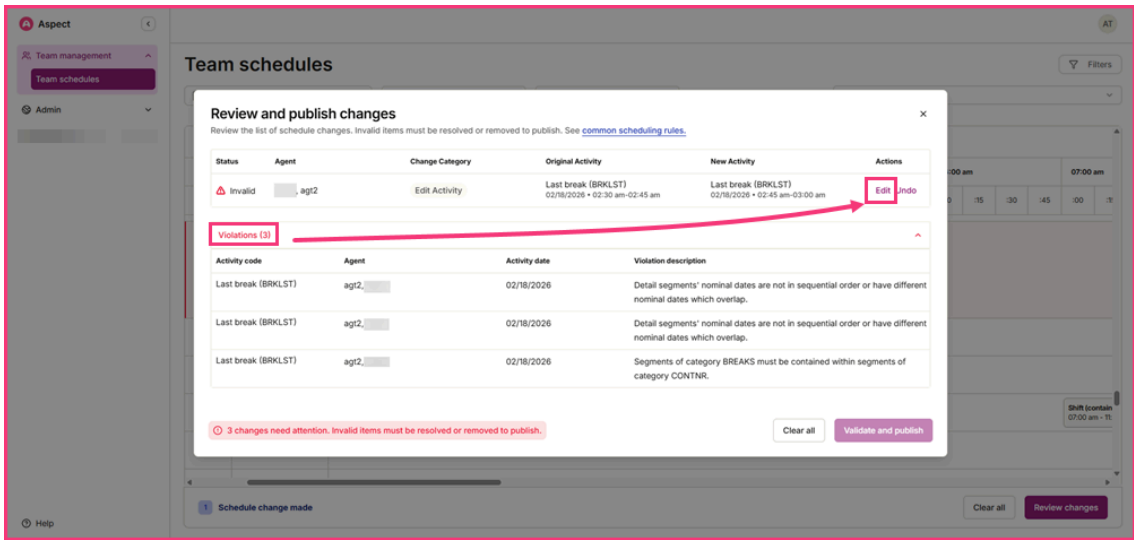


Figure 1-9

10. Click **Validate and Publish** to apply the changes.

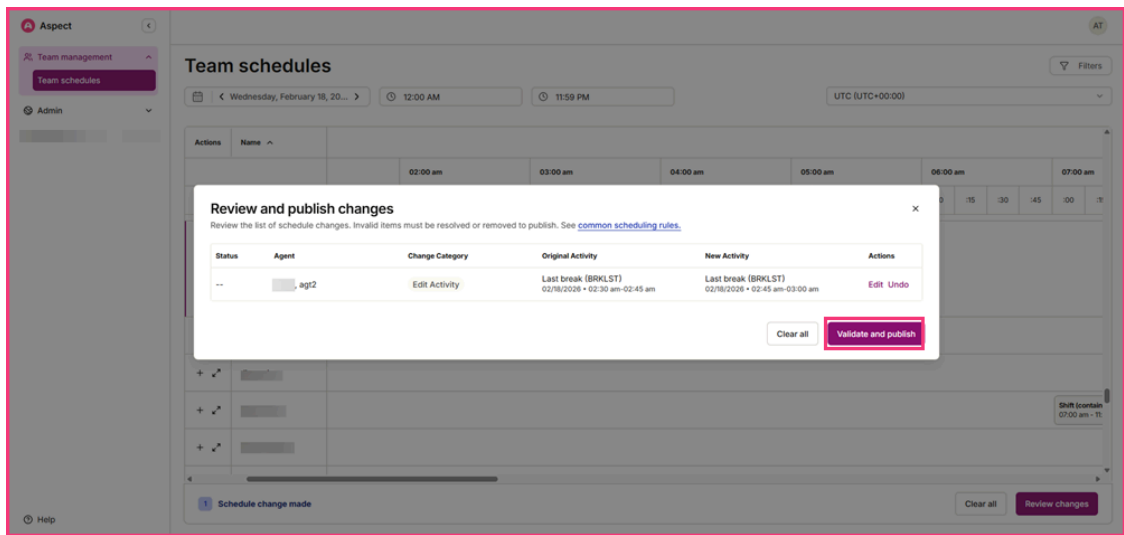


Figure 1-10

10. The schedule edits are now applied.

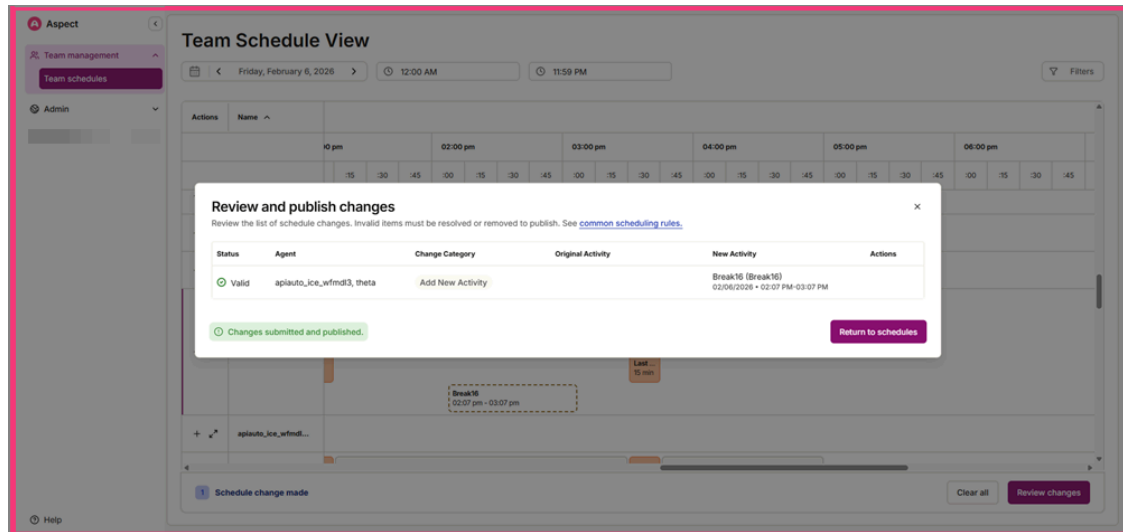


Figure 1-11

[Back to top](#)

▼ Admin: Create a New Activity for an employee



An admin can select an employee and add a new segment to their schedule.

1. [Open the New Experience and log in.](#)
2. Expand **Team management** and click **Team schedules**.
3. Click the **+** icon next to the row of the employee's schedule.

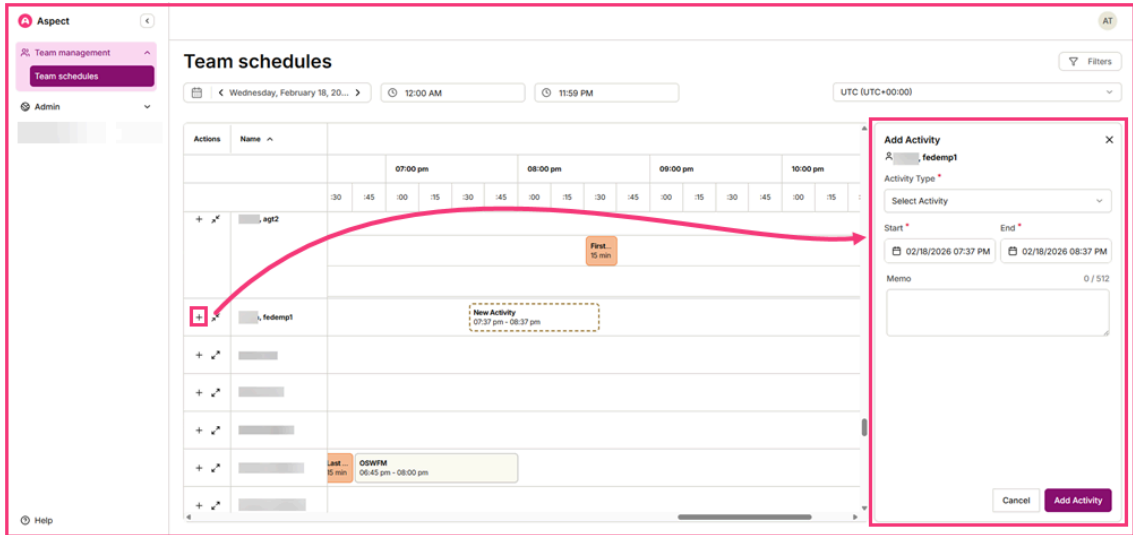


Figure 1-1

2. Select the activity you want to add, and enter the start and end times. Click **Add Activity**. Add a **Memo** if needed.

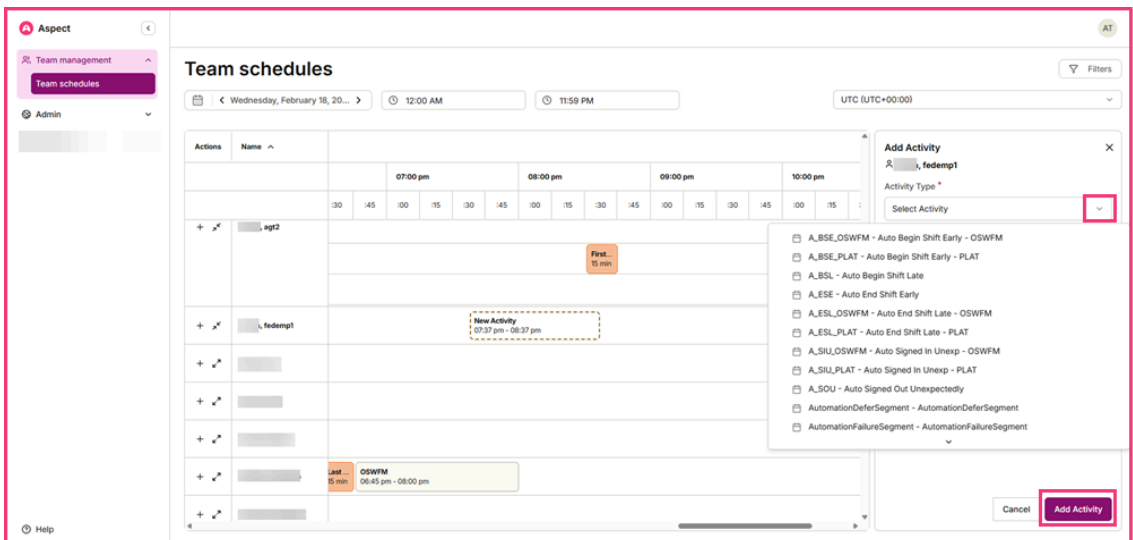


Figure 1-2

3. The activity now appears in the row of the employee's schedule. Click **Review Changes**.

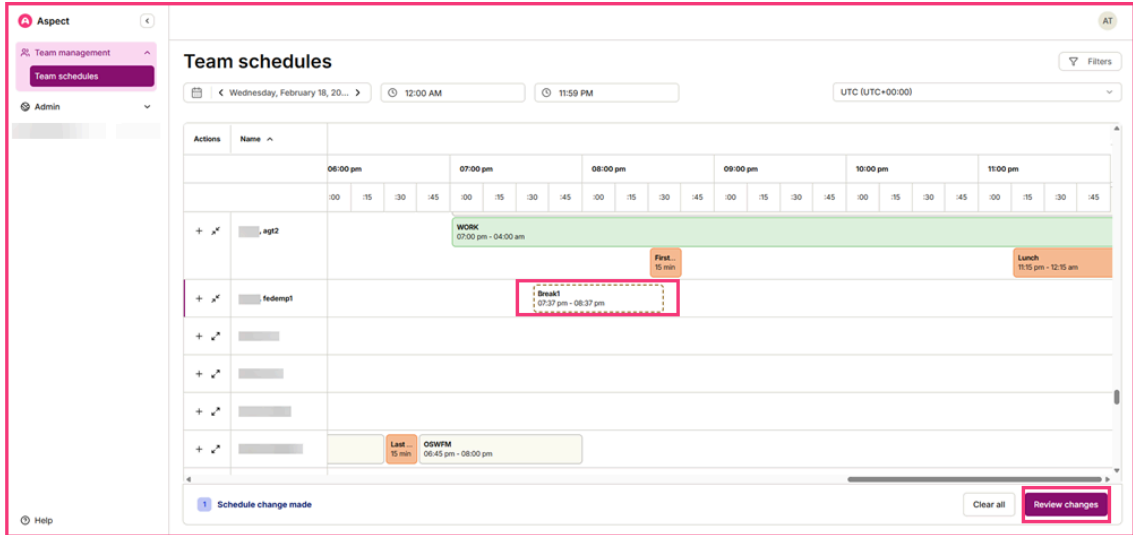


Figure 1-3

- Any violations will be listed, allowing you to edit the schedule to correct them.



Click **common scheduling rules** to view them if needed.

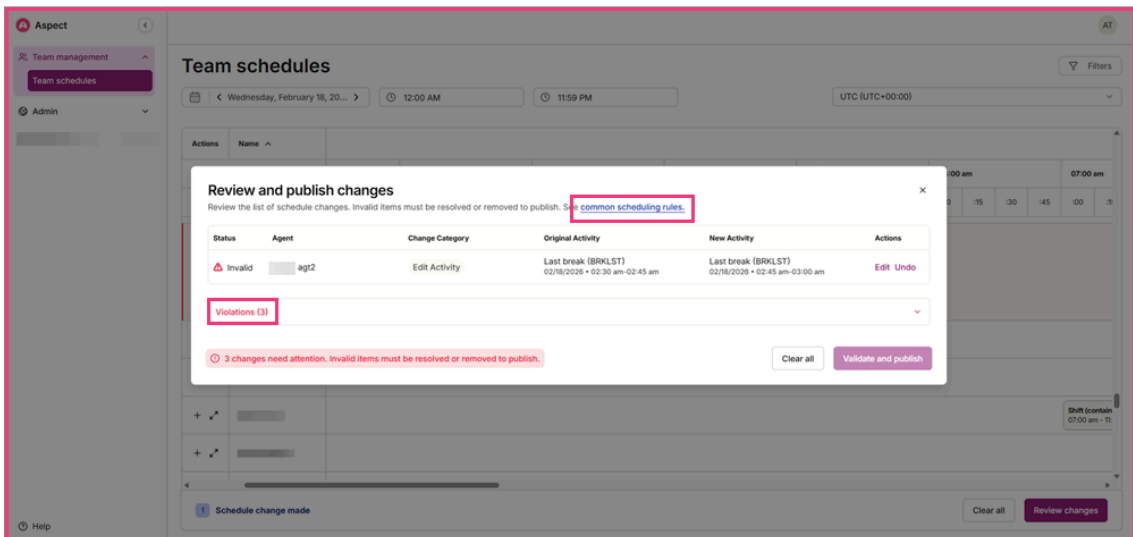


Figure 1-4

- Select **Edit** to make changes to the schedule and correct the violations.

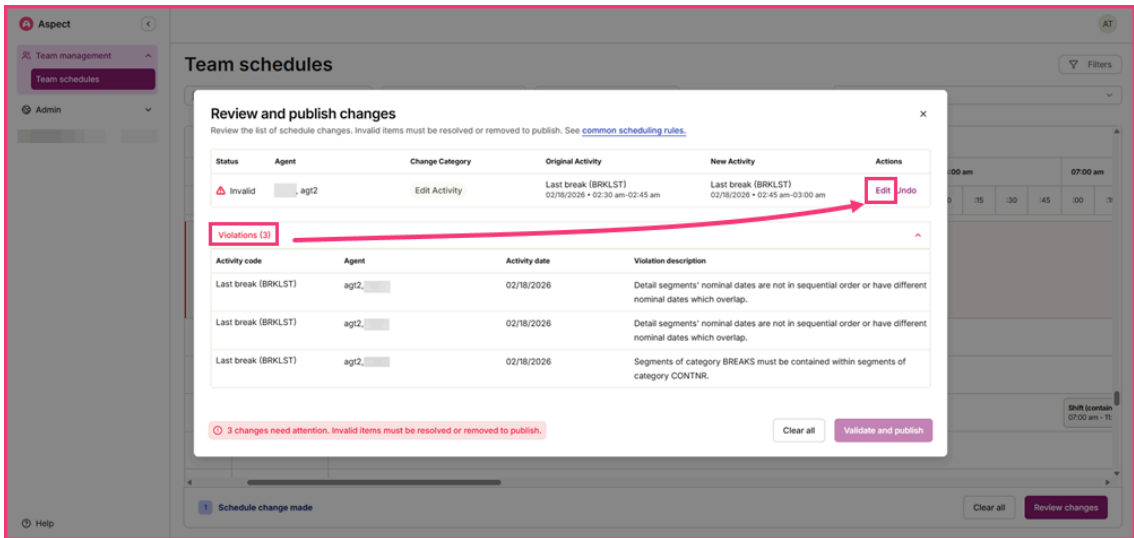


Figure 1-5

4. Click **Validate and Publish** to apply the changes.

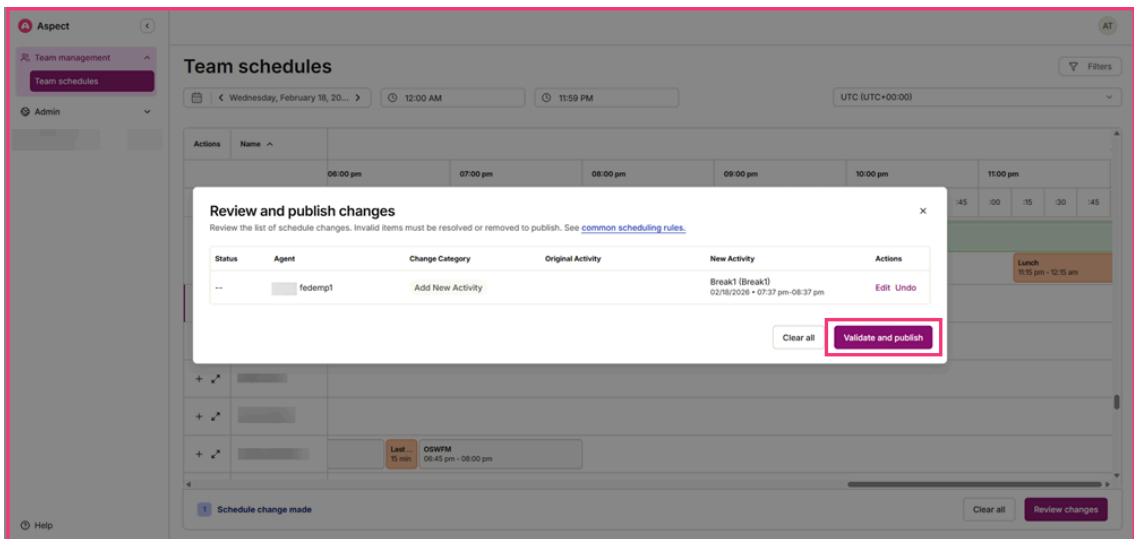


Figure 1-6

5. The new activity is now added.

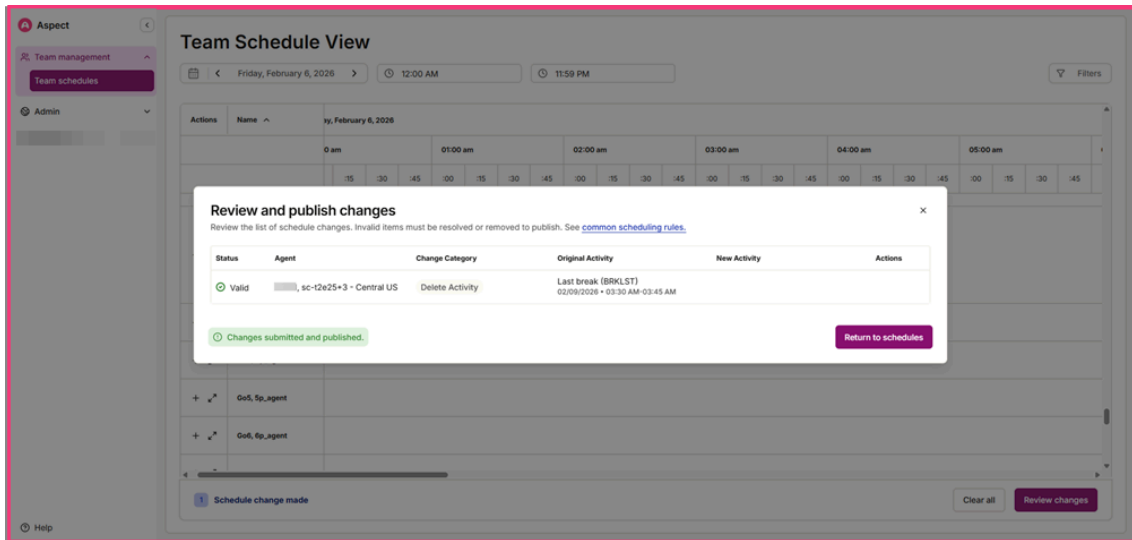


Figure 1-7

[Back to top](#)

▼ Admin: Configure automatic schedule updates based on adherence



Automatic schedule updates is a new Aspect Cloud Workforce feature that uses Aspect Intelligence to automatically add a schedule segment to an employee's schedule when a schedule alarm occurs and then clears.

1. [Open the New Experience and log in.](#)
2. Using the Left Navigation Menu, expand **Admin** and select **Workflow Catalog**. The Workflow Catalog page displays.



The Workflow Catalog allows admins to add a segment to an employee's schedule when a triggered adherence alarm is created. Admins can select a category—such as Begin Shift Early, Begin Shift Late, End Shift Early, or End Shift Late—and add segments that determine whether the agent receives pay for those time periods.

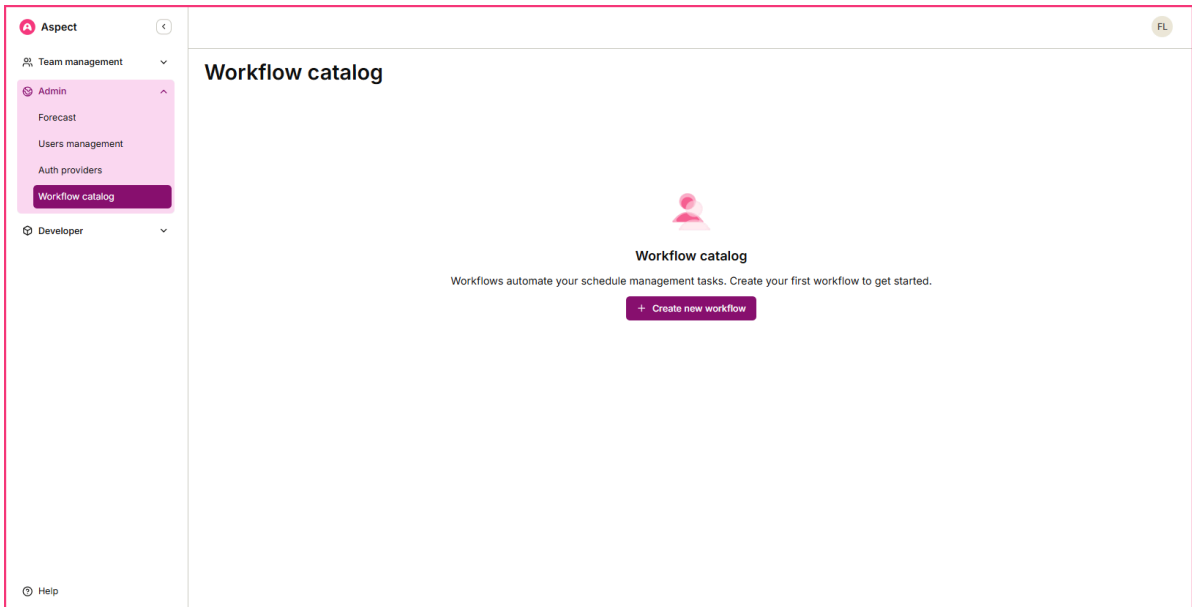


Figure 1-1

3. Click **+ Create new workflow** to create a new workflow. The button appears in the center of the screen when no workflows exist, or in the upper right corner if a catalog already exists.

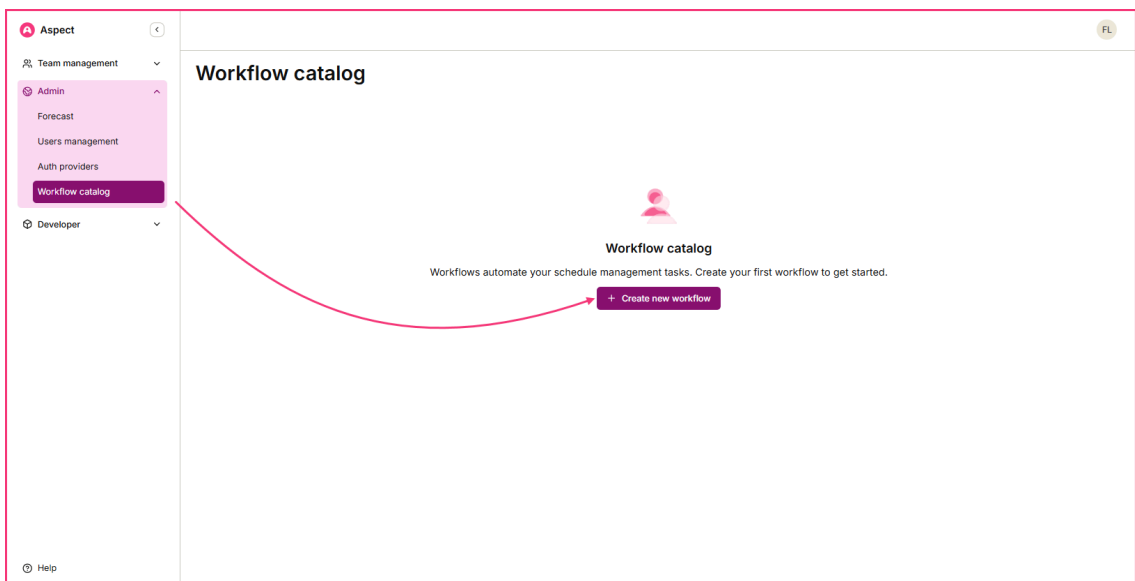


Figure 1-2

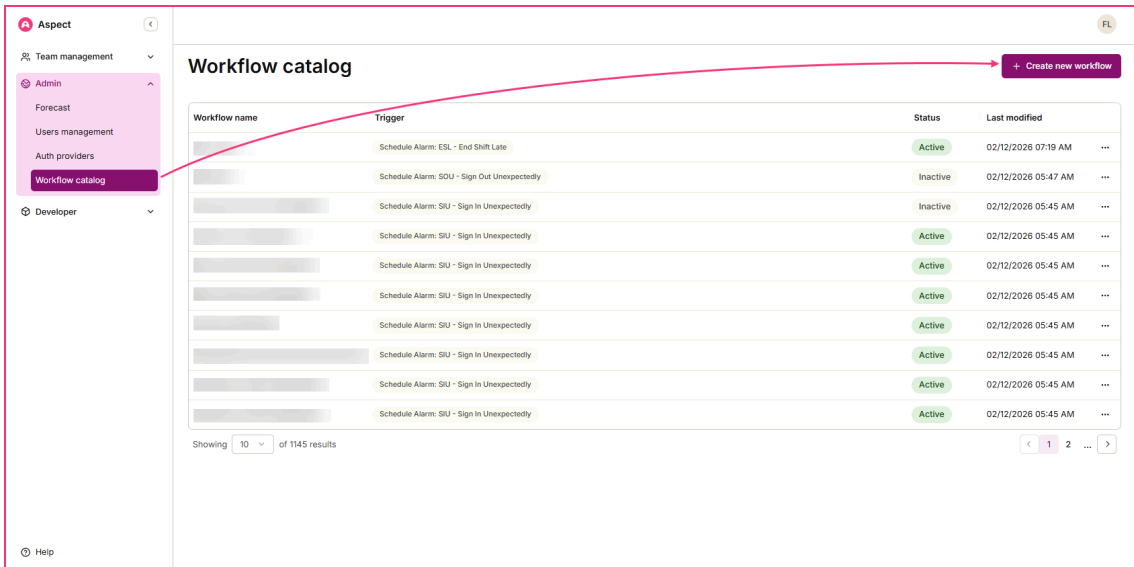


Figure 1-3

4. The Workflow Builder page displays. Type a name for the workflow in the field provided.

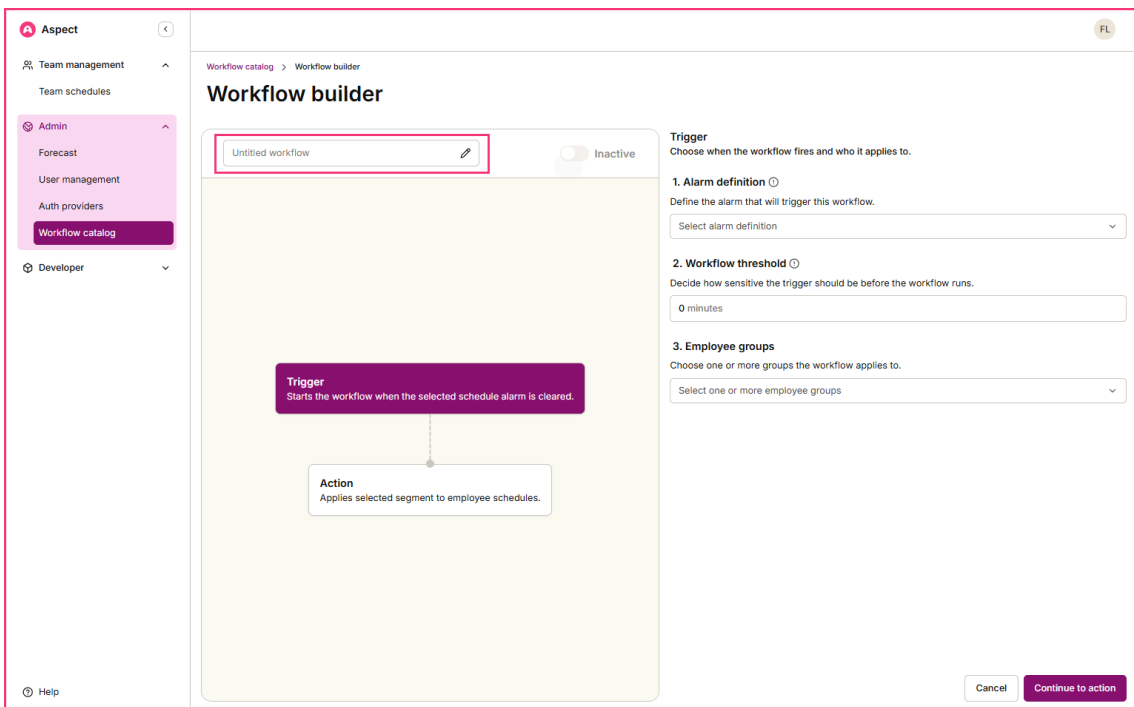


Figure 1-4

5. Select an **Alarm Definition** from the drop-down list to start building your workflow. *Alarm Definitions* can be configured in the WEM Thick Client /

Aspect Workforce. For more information see Alarm Definition in Aspect Cloud Workforce Perform.

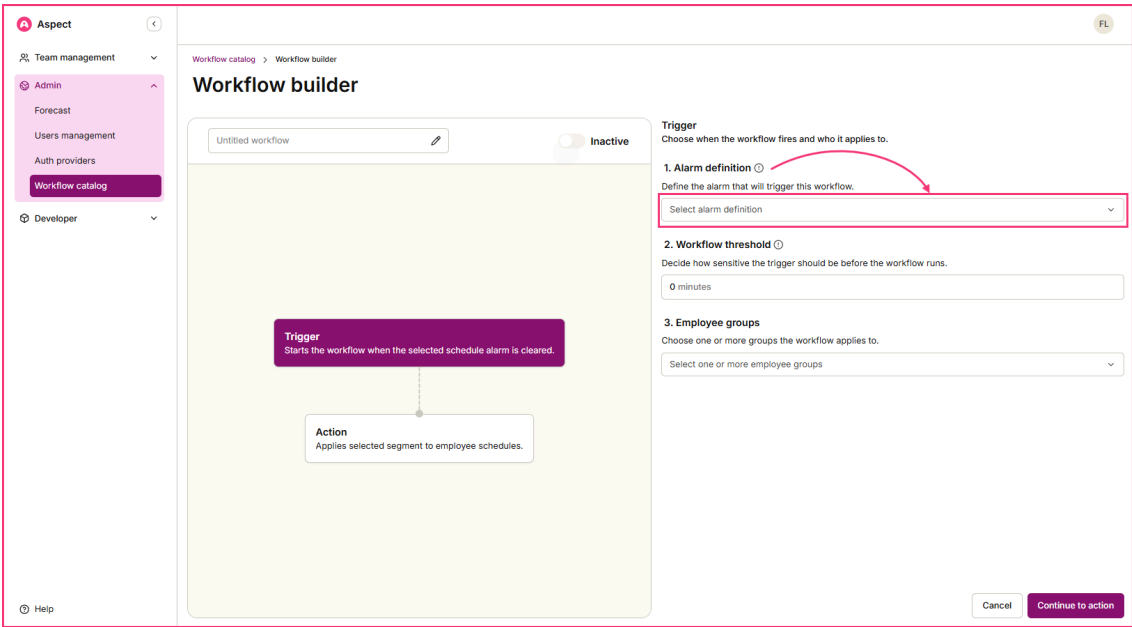


Figure 1 -5



This predefined threshold shows the minimum time required for the alarm. Using the default threshold is optional.

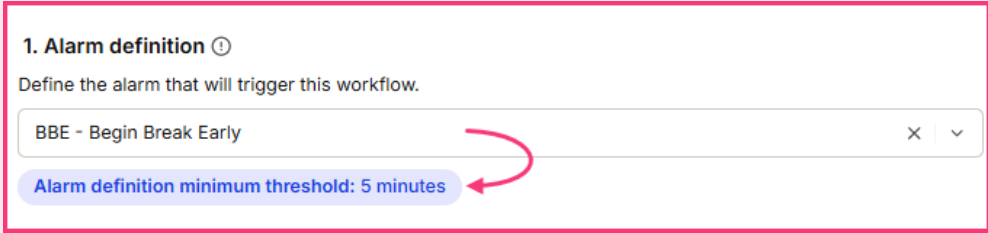


Figure 1 -6

- 6. Enter the **Workflow Threshold** in the space provided. This section allows you to set an additional threshold beyond the default threshold preset in Alarm Definition.



The *Alarm Definition* default threshold determines whether the alarm is recorded. The workflow threshold determines how long after the alarm starts before the workflow runs. Since the workflow can only trigger if an alarm is recorded, there are scenarios where a workflow may not trigger as expected. For example, an alarm may be recorded because the agent exceeded the Alarm Definition Default Threshold, but no segment is added because they didn't exceed the Workflow Threshold.

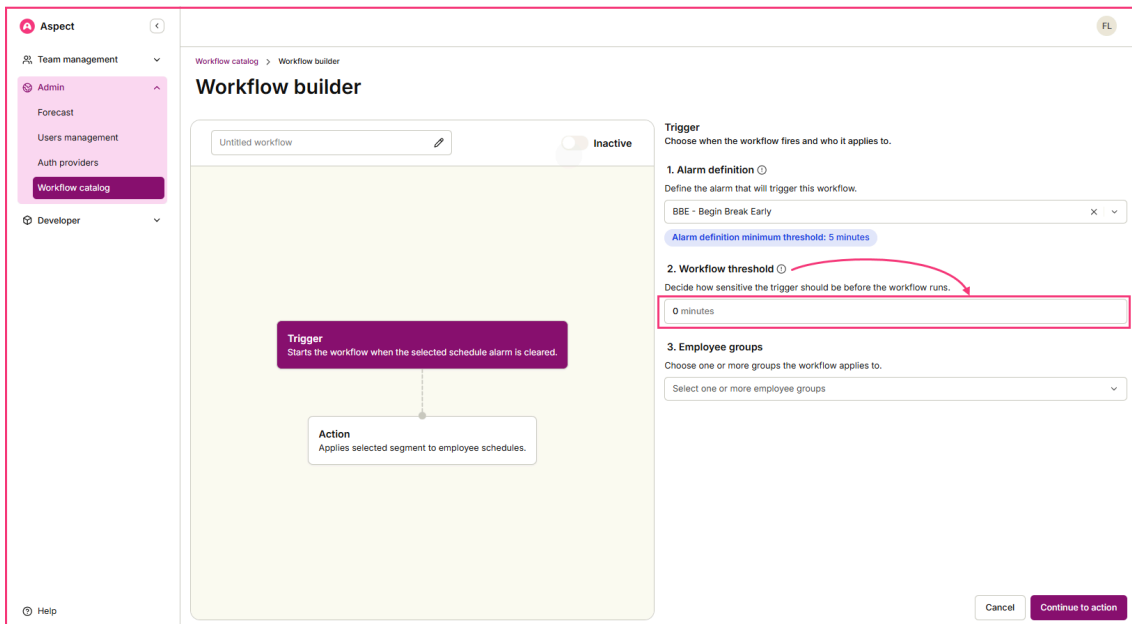


Figure 1-7



The workflow threshold provides optional sensitivity on top of the alarm's default threshold. If the workflow threshold is less than the alarm definition threshold, the workflow may not trigger. The default threshold preset number represents minutes. Note the following thresholds.

- Numbers only
- 0 (zero) is the default
- Does not allow negatives
- Does not allow decimals
- Maximum of 1439 minutes

7. Select the employee group for this workflow using the **Employee group** drop-down list. You can select multiple employee groups from the list.



This section lets admins filter alarms to trigger only for specific employees. Employees excluded from the selection will not trigger the workflow. An **All Employees** option is available.

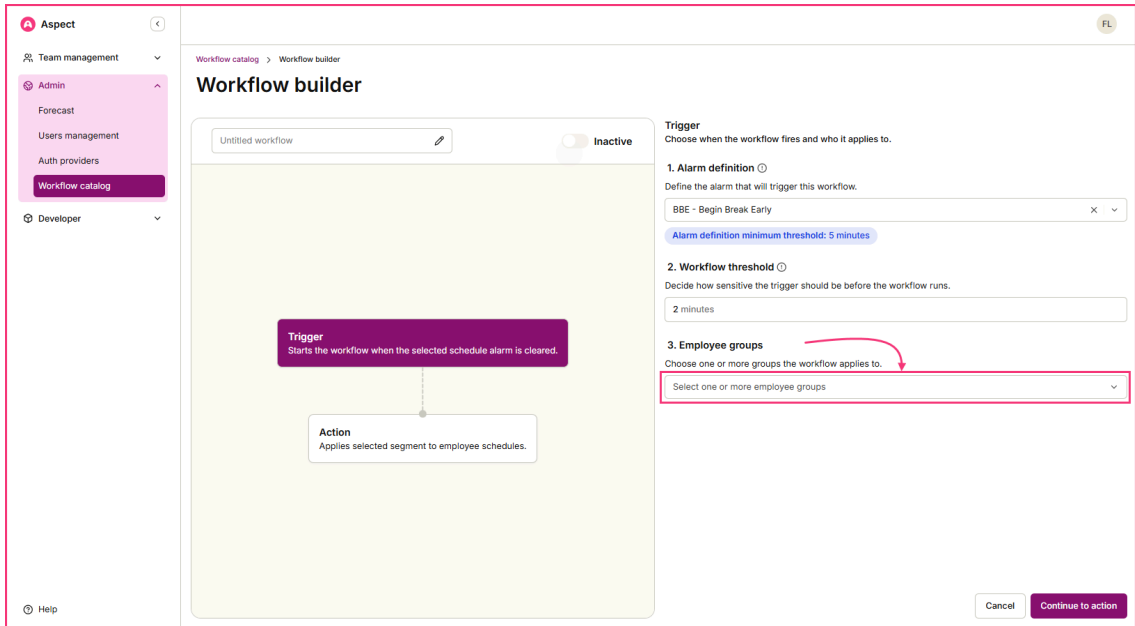


Figure 1-8

8. When you are done, click **Continue to action**.

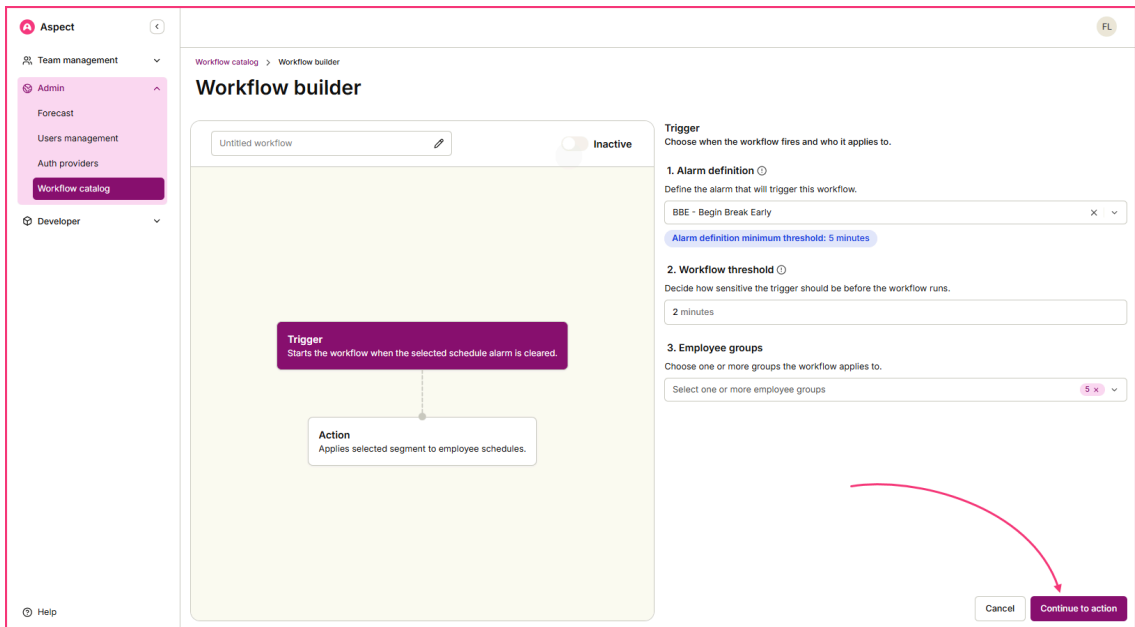


Figure 1-9

9. On the **Action** section, select the segment from the **Select Segment** drop-down list.



The admin doesn't need to select which employee receives the segment—the workflow automatically determines this based on who triggered the alarm. A dropdown will appear for the admin to select which segment to add to the schedule. If the selected segment requires a container per the Segment Entry Rules, a container option will be provided.

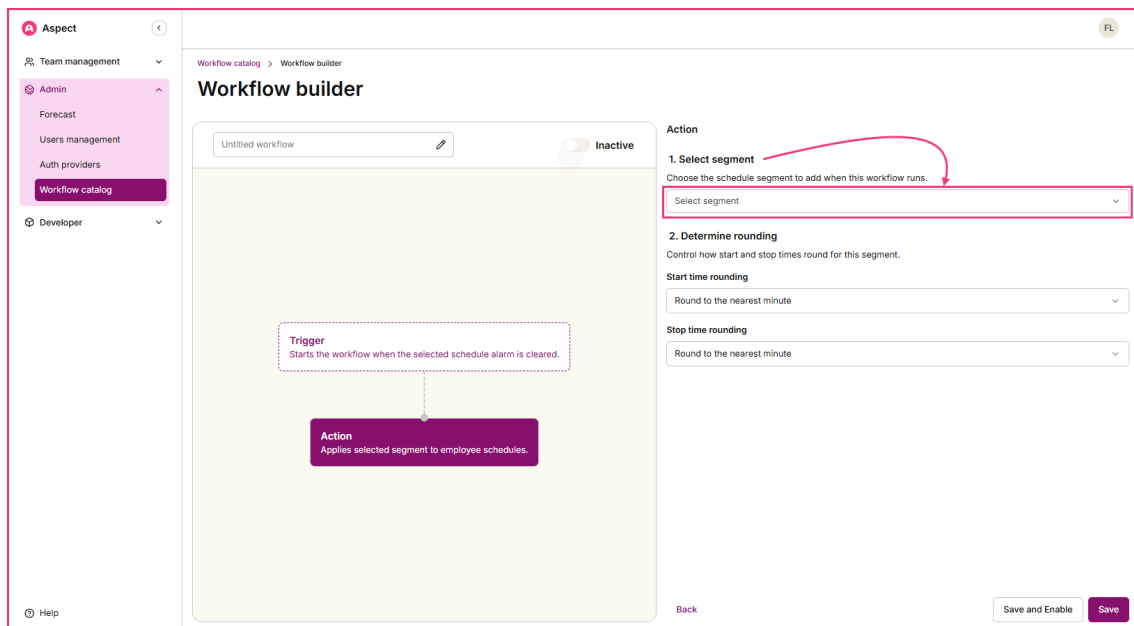


Figure 1-10

10. Under **Determine rounding**, select an option for the **Start time rounding** and **Stop time rounding** using the provided fields.



Schedule Alarms track time down to the second, but Segments must be added by the minute. You can round the alarm's start and stop times when adding them as segments. Choose from these options:

- Round to the nearest minute (default)
- Round down
- Round up

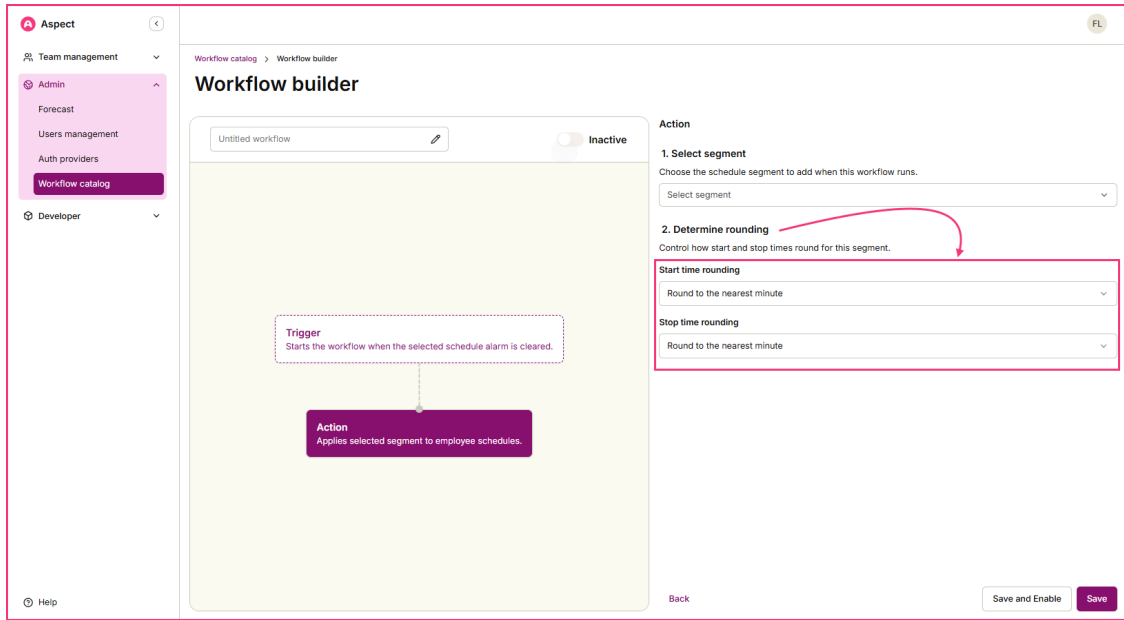


Figure 1-11

11. Click **Save** to save the workflow with an **Inactive** status, or click **Save and Enable** to set it to **Active**.

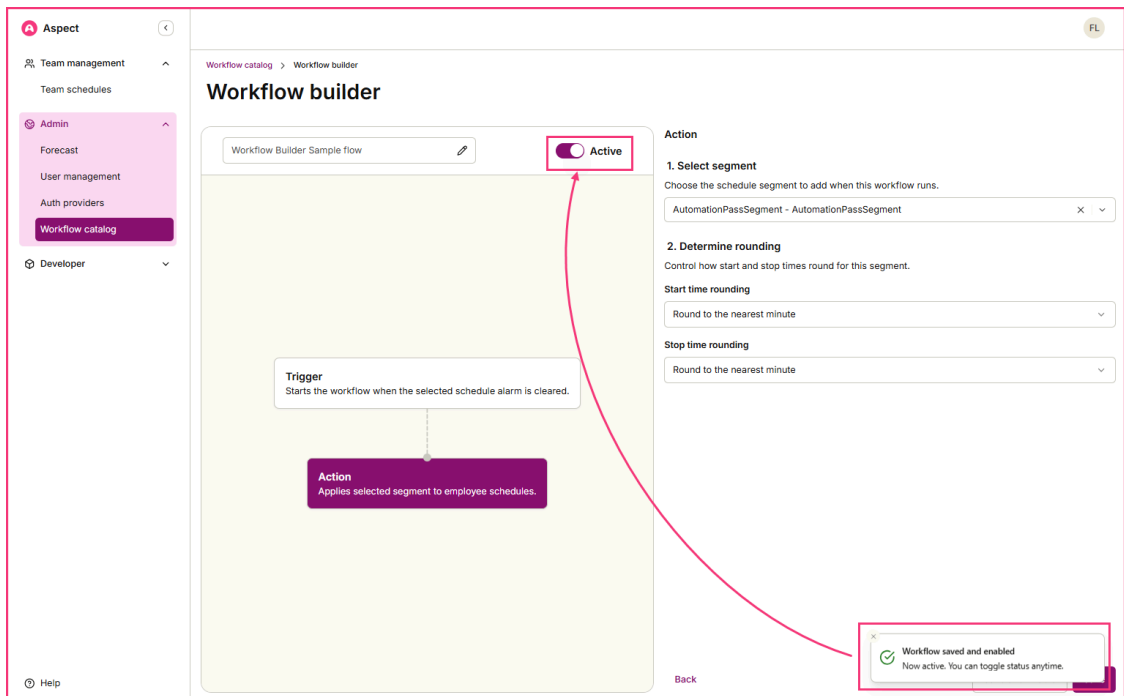


Figure 1-12

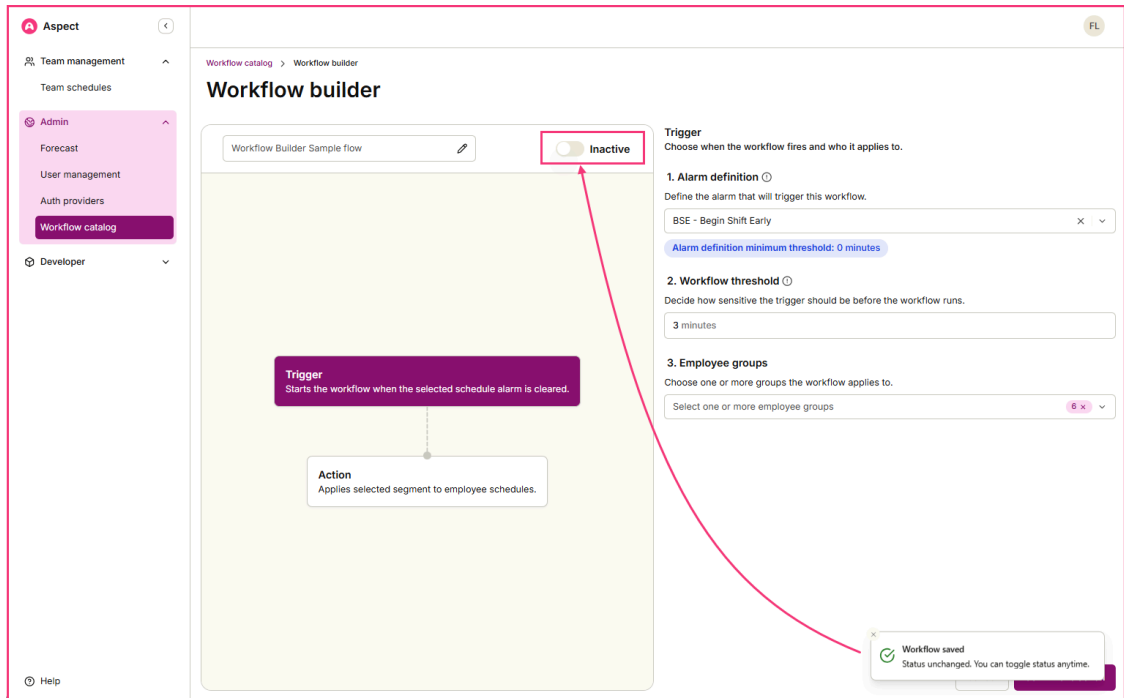


Figure 1-13



To modify a workflow in the Workflow Catalog screen, click the **three-dotted menu (...)** of the workflow you want to change. Select **Edit workflow** to open the Workflow Builder, **Enable** or **Disable** to update the workflow's status, or **Delete** to remove it from the list.

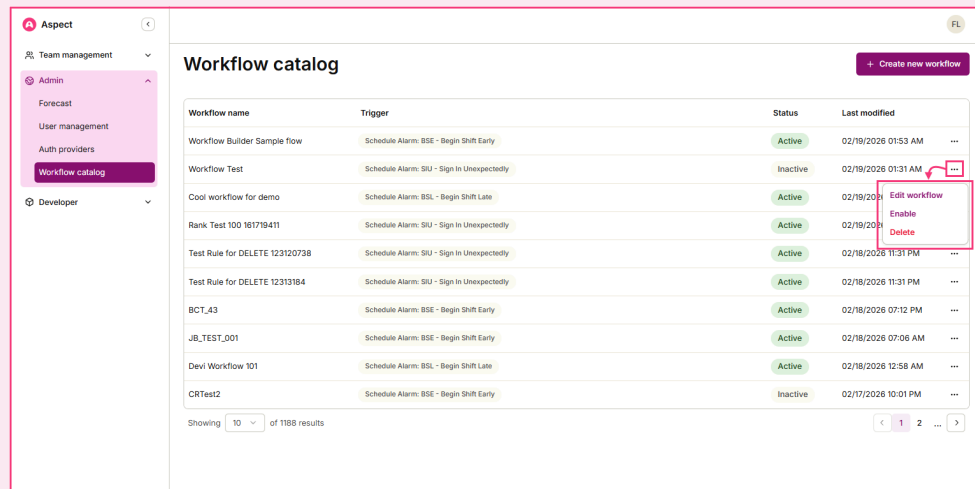


Figure 1-14

12. When a workflow triggers and adds a segment to an employee's schedule, the segment's memo will include information indicating it was automatically added and the name of the workflow that created it.



Additional Information:

- A new user will be automatically added to the Admin's WEM account to process the workflow in the background.
- If a customer experiences issues with triggered workflows, disable the workflow and contact the Aspect Support Team.
- Only one alarm definition can be selected per workflow, but you can create multiple workflows for different alarms.
- Avoid creating workflows that use the same alarm definition and can trigger for the same employee. The system uses an internal ranking system that prioritizes the oldest active workflow first.
- Workflows trigger on cleared alarms. Once the alarm clears, the segment is added immediately. The workflow will not trigger the instant an agent is out of adherence—that means the alarm has started but not yet cleared.

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▼ Admin: GDPR Compliance

Overview

This article explains how to secure user and employee data to comply with GDPR requirements.



To delete or remove an employee user in the New Experience, you must use the WFM procedures because Employee users are sourced from WFM.

Admin users are not sourced from WFM, so you can delete or deactivate them directly in the New Experience.

Right to Erasure

Workforce Management satisfies the right to erasure by providing the tools and procedures documented in this article.

Delete an Employee

You can easily delete an employee you've just added—for example, if you created an employee record by mistake. However, if the employee has been associated with other Aspect Workforce Management information (particularly official schedules), it's usually better not to delete them. Instead, terminate and inactivate the employee to maintain the integrity of your tracking history, especially intra-day performance information.

To delete an employee:

1. Open the Workforce Management client.
2. Navigate to **Employees > Employee Records**.
3. Select the employee to delete and select **Special > Change Employee Status**.
4. Terminate the employee, using the **Change Employee Status** option.
5. On the Change Employee Status dialog box:
 - a. Under **Employee Status**, select the **Change To** option.
 - b. Select the **Terminated** option and specify the **termination date**. The termination date must be the current system date or a previous date.
6. Delete all data records that refer to the employee explicitly and that block employee deletion. To view these cross-references, select the employee and select **Tools > Show Cross-References**, which opens the **Cross Reference Summary** dialog box.
7. If the employee is an employee user, use the **Users Administration** module to change that user to an inactive, regular user.

8. In the **Employee Records** grid, select the employee.
9. Select **Edit > Delete** and confirm your choice when prompted.



Deleting the employee removes any remaining cross references, such as trial schedule assignments. The Cross Reference Summary dialog box (mentioned in step 6) displays the dependent data types and the number of records of each type that exist in the database. The content below lists these data types and indicates which types block deletion of an employee record.

Delete a User

As with most types of data, you can delete a selected user by selecting **Edit > Delete**. However, if there is data associated with the user, you must either delete it first or associate it with another user. The Delete option itself enables you to easily perform the latter alternative.

After you select **Yes** at the confirmation prompt, the **Delete Users** dialog box opens. Here you can associate a different user with the data associated with the user, or users, you are deleting.

The data associated with a user consists of various types records that the user created or updated and that have an **Updated By** column in the associated grid. If there is no such data, you can select the second option (Delete the selected users if there is no data associated with them).

If there is associated data with a user, select the first option (Associate all data with another user and delete the selected users) and specify a different user to be associated with the data. For best results, select a “dummy” user that you

have created only for this purpose, as opposed to an actual user. For example, you might choose the user name `deleted_user`.

After you click **OK** and the deletion is finished, this user name appears in the Updated By column of all grids containing associated records.

Delete Contact Definition

A **Contact Definition** is a person whom users can communicate with by the way of email, instant messaging, or telephone.

To delete a Contact Definition:

1. Navigate to **Administration > Contact Definitions**, and select the contact to be deleted.
 2. Right-click on the contact and choose **Delete**.
-

Delete Autorun

Reports can be sent to email addresses, either using contact definitions or literal email. Literal

emails will need to be found using a SQL command: `select * from AUTORUN_PROC`

where `PROC_PAR LIKE '%John.Doe@aspect.com%'` The autorun jobs found by the above query will need to be deleted or changed to remove the email.

Delete Logs

In addition, some log files may need to be addressed by your system administrator:

- Windows Event Viewer - This will expire automatically.
- WFM Event Viewer - this will expire automatically (based on system clean-up).
- AMR log - This isn't always enabled, but if it is, it will need to be manually deleted by your system administrator.

- RTA log - This will need to be deleted by your system administrator.
- IIS log - This isn't always enabled, but if it is, this will expire automatically.
- WFO log - this will expire automatically.
- WFMDData log - this will expire automatically.

Right to Data-Portability

Workforce Management satisfies the right to data-portability by providing the tools and procedures documented in this article.

View Employee Information

You can view employee information using the **Employee Records** module in Workforce Management.

The following modules are used to add, view, and change the information for individual and multiple employees, including their IDs and status information, extra field information, employee group assignments, and schedule preferences.

The primary modules for viewing employee information are:

- **Employee Records**, which lets you add, view, and operate on individual or multiple employees in a master list. You enter and view each employee's information using the Employee Information form.
- **Employee Information form**, which provides a quick way to edit a single employee record.
- **Employee Reports**, which allows you to view user-selected information on each of your employees.

The Employee Information Form

Use the Employee Information form to enter and view information about a specific employee. This form is accessible from several modules.

Enter the information on the following pages, as needed:

- **General**—Enter the essential identification and status information about this employee, such as name, ID, email address, and hire date.
- **Extra Information**—Enter extra information about the employee on one or more extra information pages set up by an administrator.
- **Group Assignments**—Assign the employee to one or more employee groups.
- **Skills**—Enter the employee's skill associations.
- **ACD Login ID**—Enter the employee's ACD login IDs (optional).

Employee Information Reports

Aspect Workforce Management provides several employee information reports you can preview, print, and export. The following Employee Information reports are available:

- **Employee Information - E-mail Address** - This report shows each employee's ID, name seniority, hire date, termination date, and e-mail address. Report details are grouped by employee group.
- **Employee Information - Extra Fields** - This report shows each employee's name and seniority, plus as many as four employee extra fields. Report details are grouped by employee group.
- **Employee Information - General** - This report shows each employee's ID, name, seniority, hire date, termination date, and time zone. Report details are grouped by employee group.

- Employee Information - **Instant Message Address** - This report shows the employee ID, name, seniority, hire date, termination date and instant message address. Report details are grouped by employee group.

To create employee information reports, open the **Reports** module, select **Employee Reports**, then select **Employee Information reports**, and choose the desired report, and select **File > Print**.

Previewing a report lets you see exactly how it will look when you print it. And, while previewing, you can print or export the report at any time.

View User Information

You can view user information by accessing the Users Module in Workforce Management.

To access the Users Module, navigate to **Administration > Access Control > Users**. Complete the user name field to find a specific user, or select the All check box and click the **Retrieve** button to display all users. You can then view user information by double-clicking a user record.

Right to Rectification

You can rectify erroneous information by editing employee and user data in Workforce

Management. This section describes the tools and processes that Workforce Management provides in order to rectify data.

Edit an Employee

You can rectify employee information by using the Employee Information Form as described in

The Employee Information Form.

Edit a User

You can rectify user information using the Users module ad described below.

To edit a user:

1. Open the **Users module (File > Open)** or select **Administration > Access Control > Users** in the navigation tree.
2. Complete the user name field to find a specific user, or select the **All** check box and click the **Retrieve** button to display all users.
3. Double-Click the user to be edited, displaying the **User** form.
4. On the **General** Page, you can type over the **User Name** and **Alternate User Name**.
5. On the **Access** Page, you can type over the **Login ID, First name, and Last name**.
6. Click **Save** and **Close** when you are finished editing the user.

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Employee Schedule Management

▼ Employee: Dashboard overview



The New Experience employee dashboard serves as a central hub for employees after login. It consolidates essential workforce metrics for easy viewing and access while empowering employees to engage more effectively with tasks and responsibilities.

1. The New Experience is organized into four main sections that that are viewable from the left-hand navigation menu.
 - **Dashboard:** Click **Dashboard** to return to the Dashboard at anytime.
 - **Scheduling:** Expand **Scheduling** and click **My schedule** to open the Schedule view. Optionally, you can select **My requests, My balances,**

Trade board, or Shift Bids.

- **My Performance:** Click **My Performance** to open the Performance Hub.
- **Notifications:** Click the **Notifications** icon > **View all** to open the Notifications view.
- Click your **profile** icon to configure personal settings, adjust your timezone, enable web browser push notifications, or log out.

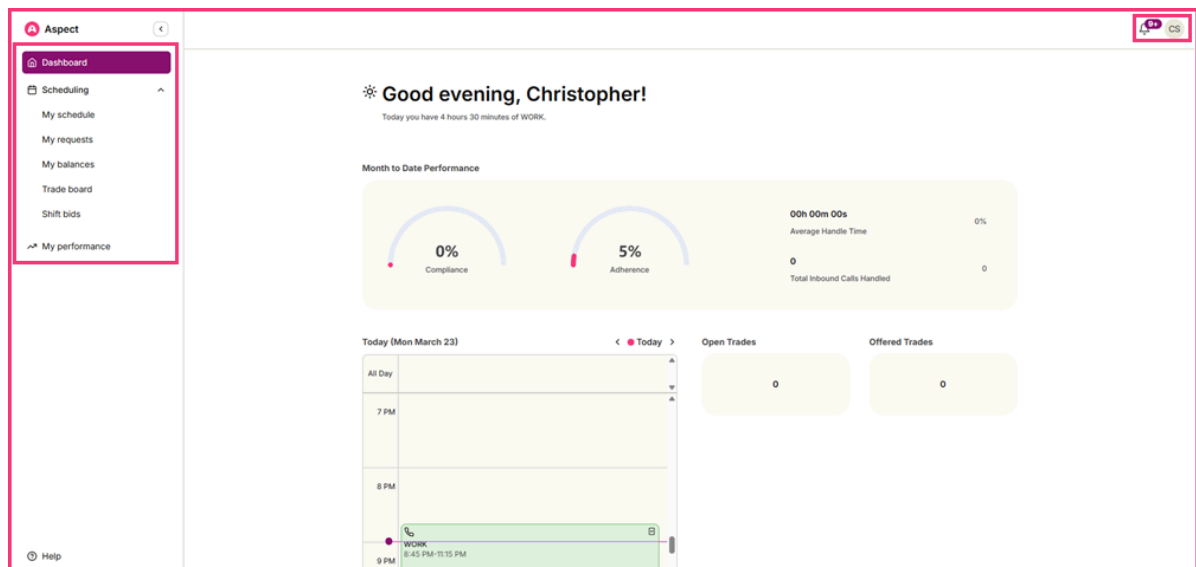


Figure 1-1

2. The dashboard contains the following widgets:

- **Performance widget:** The Performance widget displays key performance indicators including Compliance Time, Adherence Time, Average Handle Time, and Total Inbound Calls Handled. It shows month-to-date data with trends comparing performance to the same date range in the previous month. Click any displayed KPI or Month to Date Performance to see the metric displayed from the Performance Hub page.

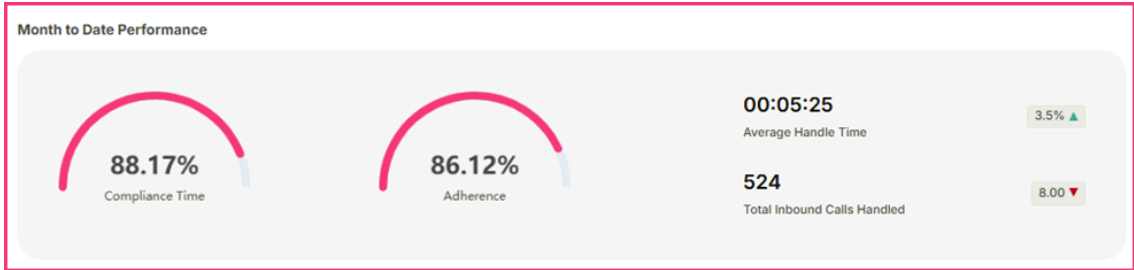


Figure 1-2

- Schedule widget:** The Schedule widget provides a streamlined view of your current day's schedule upon login, displaying shift times and work types with clear time intervals and durations. Use the arrows in the top right to navigate to previous and upcoming days' schedules. Click **Today** to return to the current day's schedule. The highlighted area indicates the current activity.

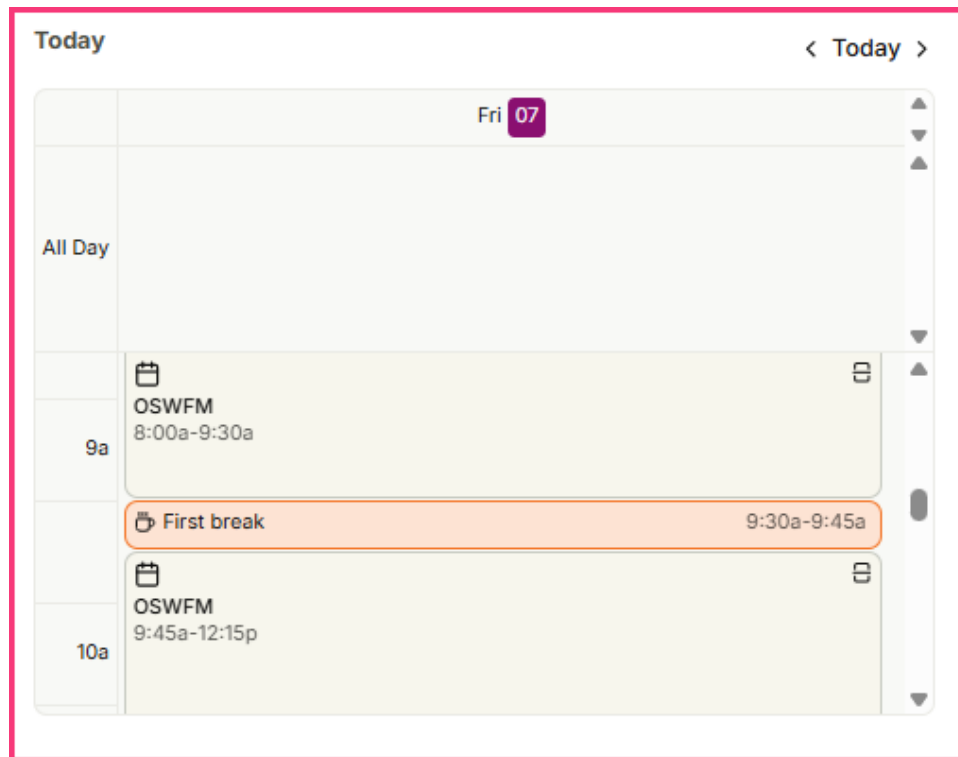


Figure 1-3

- Status Updates widget:** The Status Updates widget displays near real-time status updates for shift trade and exchange requests.

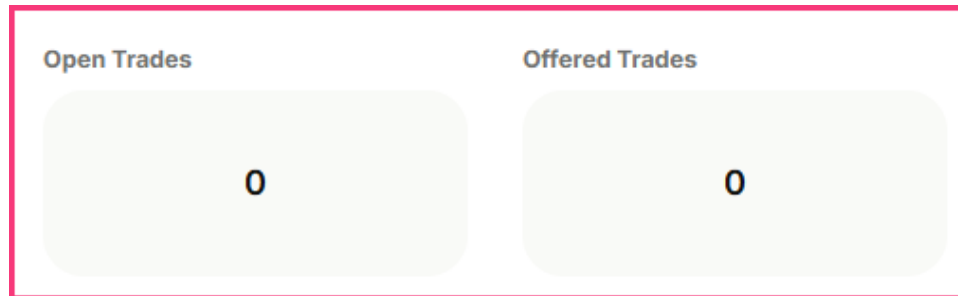


Figure 1-4

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▼ **Employee: Navigate the Schedule view**

1. Open the New Experience and log in.
3. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**. You can return to the Schedule view at any time by clicking **My schedule** under **Scheduling**.

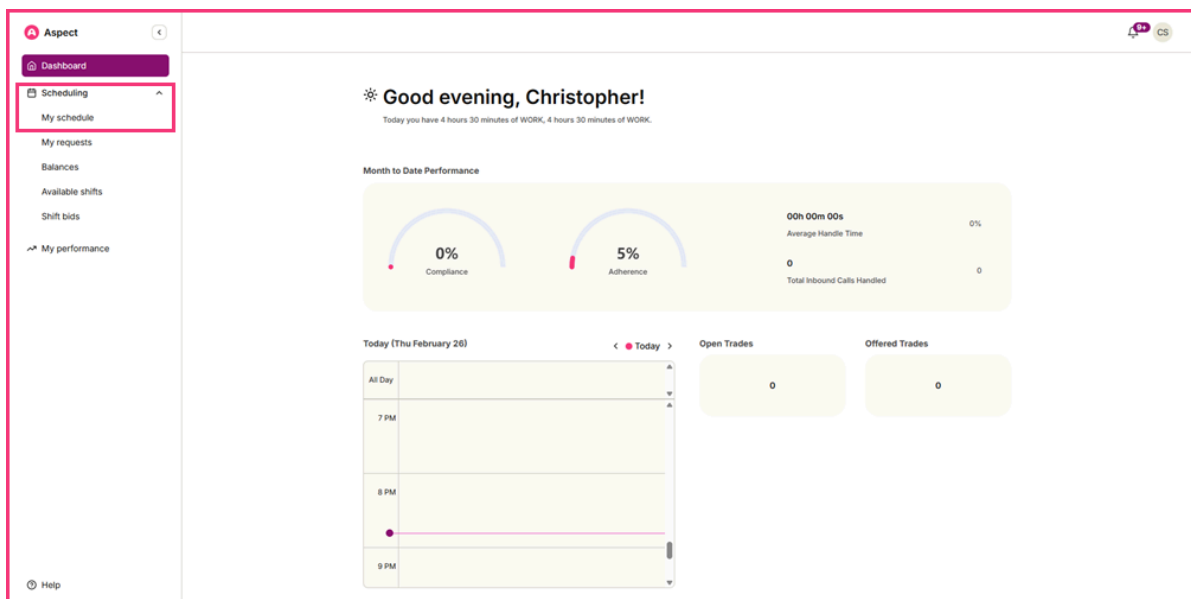


Figure 1-1

3. On the right side of the screen, click the **Calendar** icon to select a specific date.

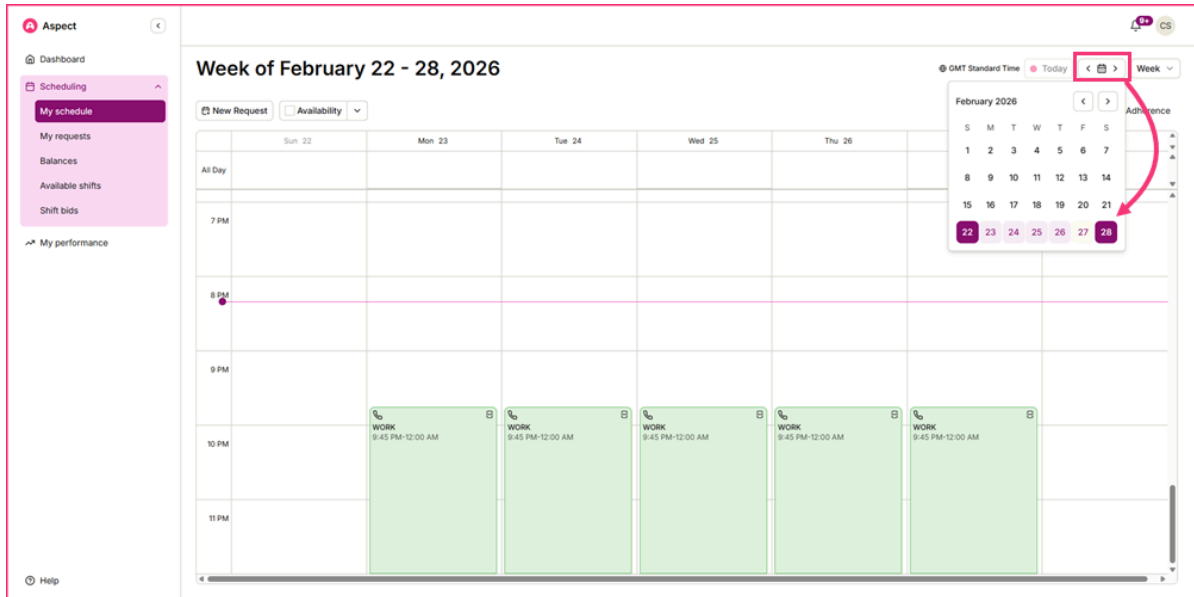


Figure 1-2

4. Click the **toggle arrows** next to the **calendar** icon to change the schedule view by **day**, **week**, or **month**. This will reflect in the **Week of...** date shown on the left side of the screen.



The **purple timeline** shown in the day and week views indicates the current time. See how to adjust the **timezone** or **time format**.

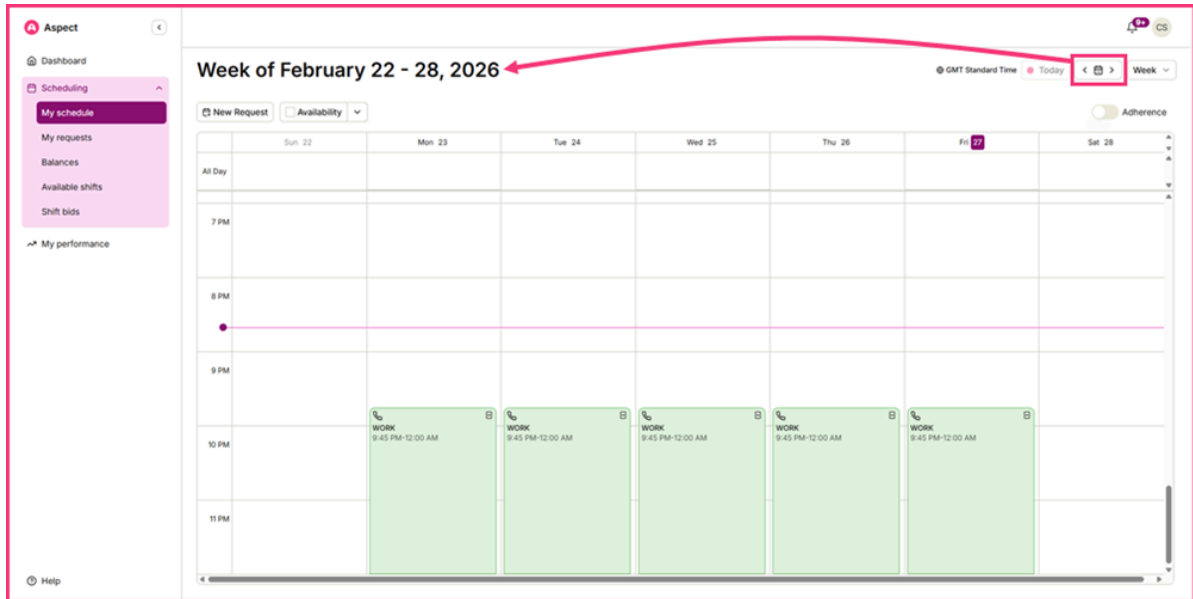


Figure 1-3

5. To change the calendar display of the Schedule view, click the drop-down menu next to the **calendar** icon and select **day**, **week** or **month**. The toggle options for the calendar icon menu will reflect the current selection. Click **Today** to return to the current day's view.

- **Figure 1-4** shows the **Day** view.

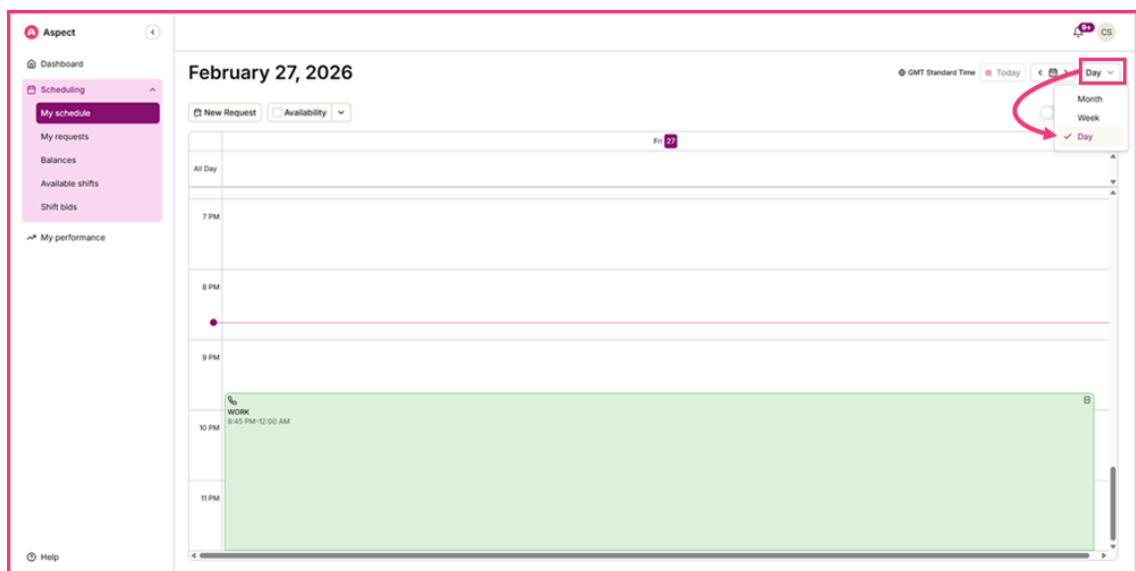


Figure 1-4

- **Figure 1-5** shows the **Month** view. To view the Activity details for a specific day from the month view, click the + icon to expand the activity menu. The purple timeline will not be visible in the month view.

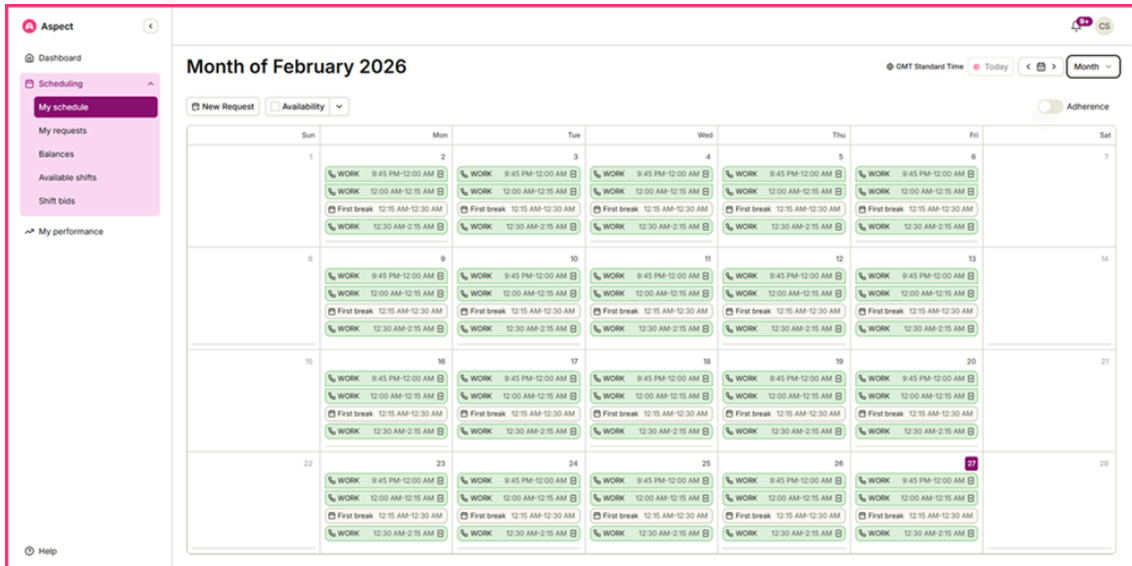


Figure 1-5

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▼ **Employee: Select an Activity and view the details**

1. Open the New Experience and log in.
3. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**.

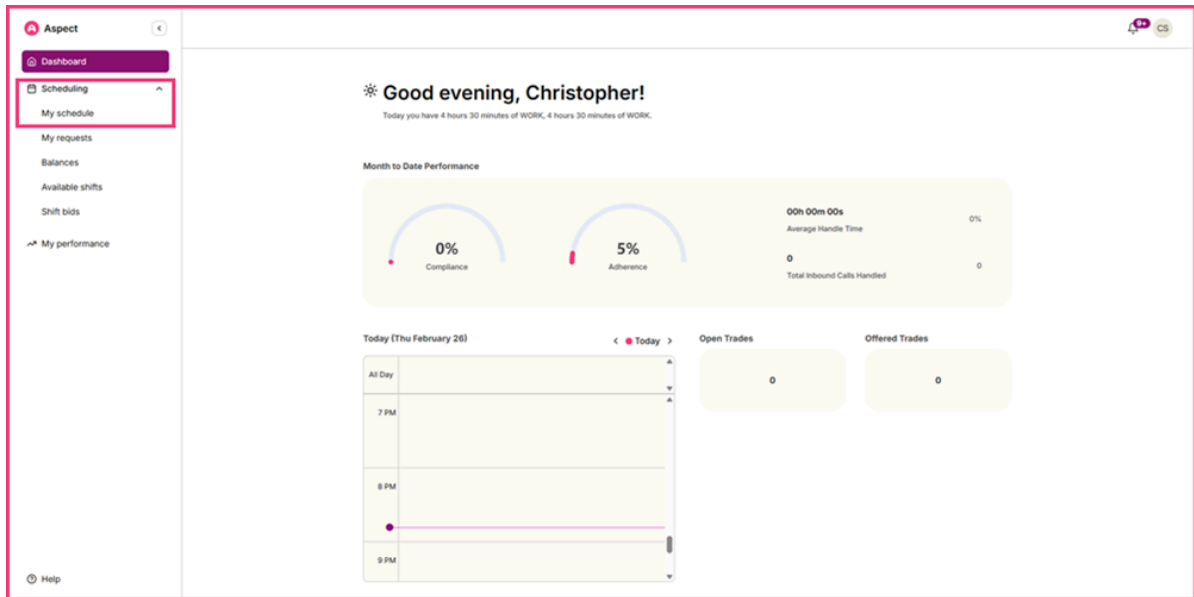


Figure 1-1

3. Click an **Activity** to view the details.

- The **Activity type**, the **time** and **date**, and the **duration** of the Activity will appear in the **View** panel on the right side.

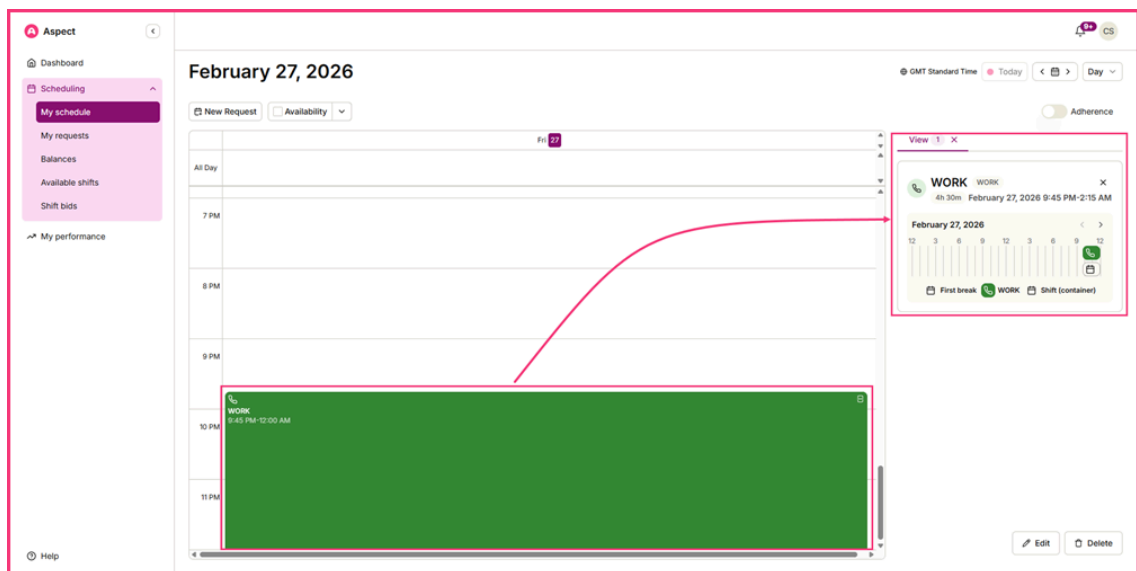


Figure 1-2

4. In the **View** panel, click an individual **Activity** to see a visual representation of how the Activity fits within your entire work day. The **Edit**

and **Delete** buttons are available at the bottom of the **View** panel. See how to submit a change request to an existing activity.

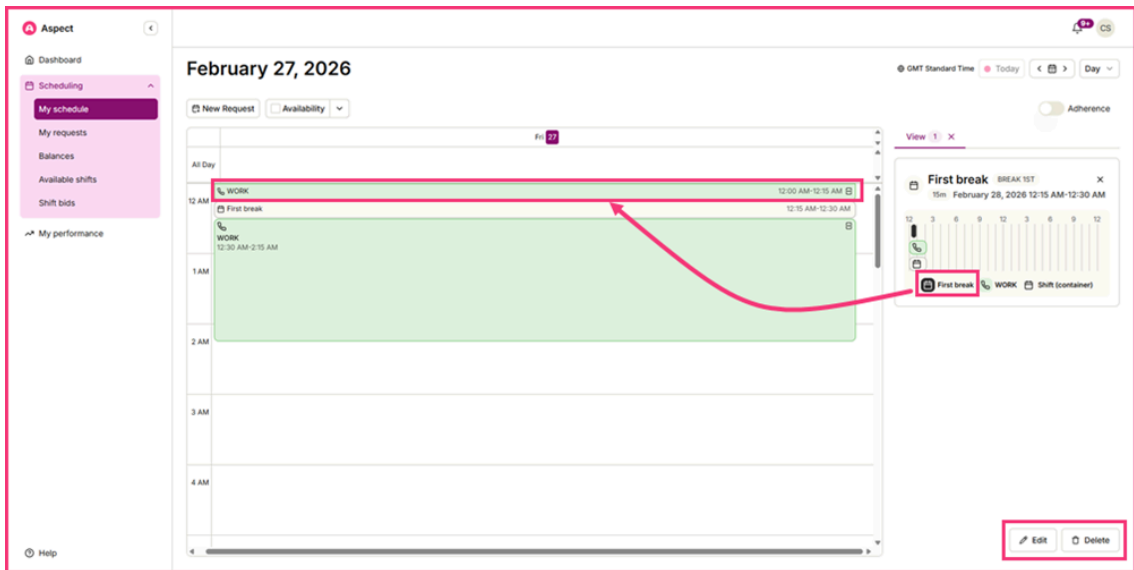


Figure 1-3

5. To view details for multiple activities, click an **Activity**, then press **CTRL** and click the other desired **Activities**. The details for all selected **Activities** will appear in the **View** panel.

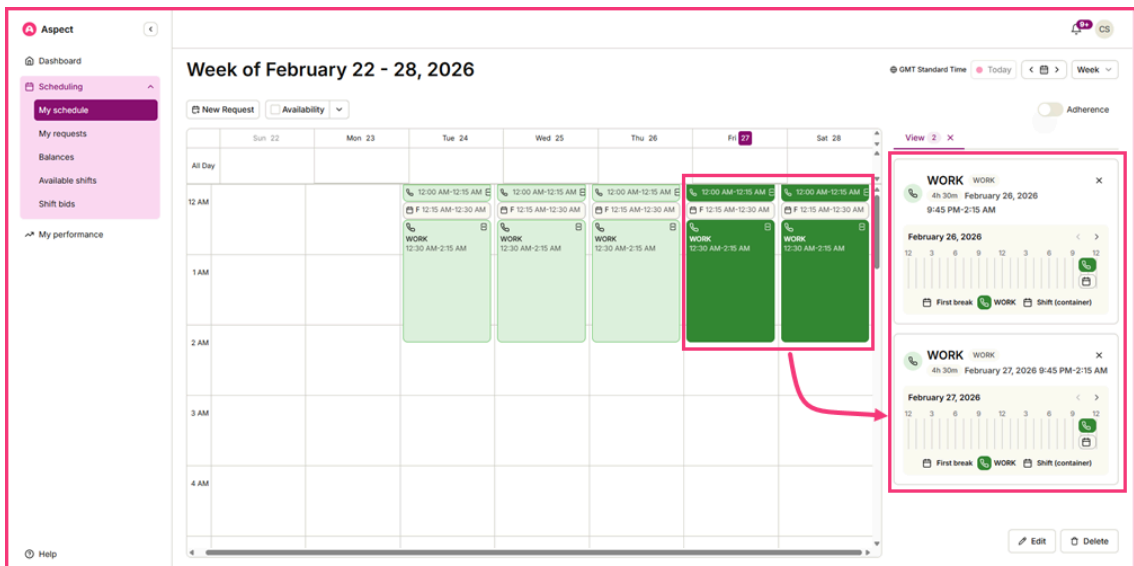


Figure 1-4

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▼ Employee: Configure and apply an Activity Template



An Activity Template lets you create automated requests to rearrange your schedule or set up recurring activities based on your preferences and current schedule.

1. Open the New Experience and log in.
3. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**.

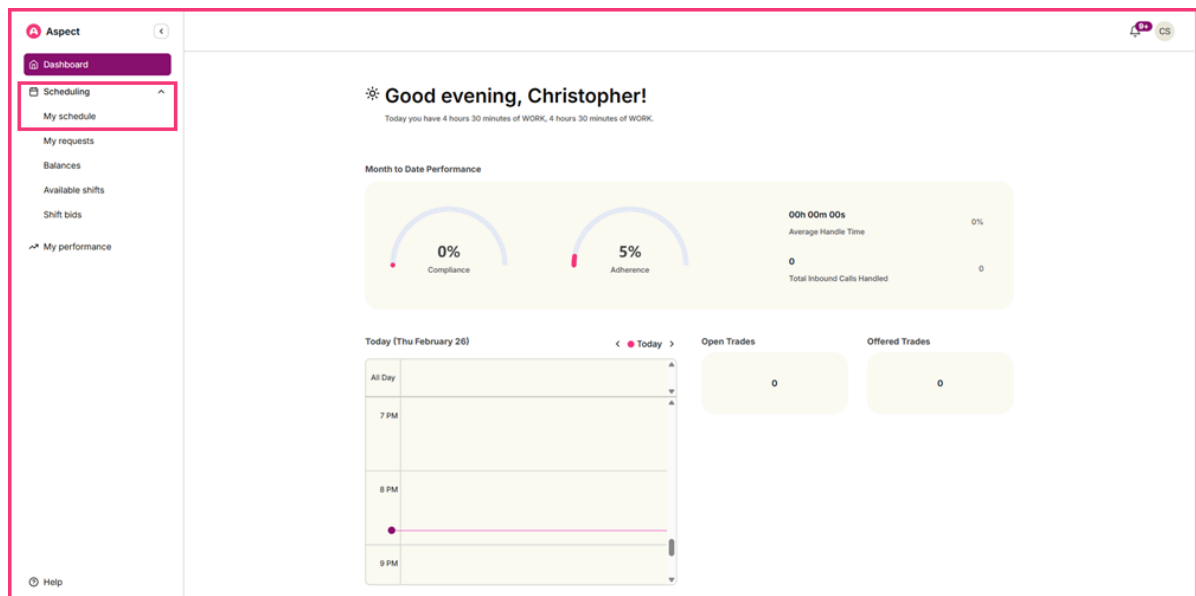


Figure 1-1

3. On the **My schedule** page, click **New Request**.

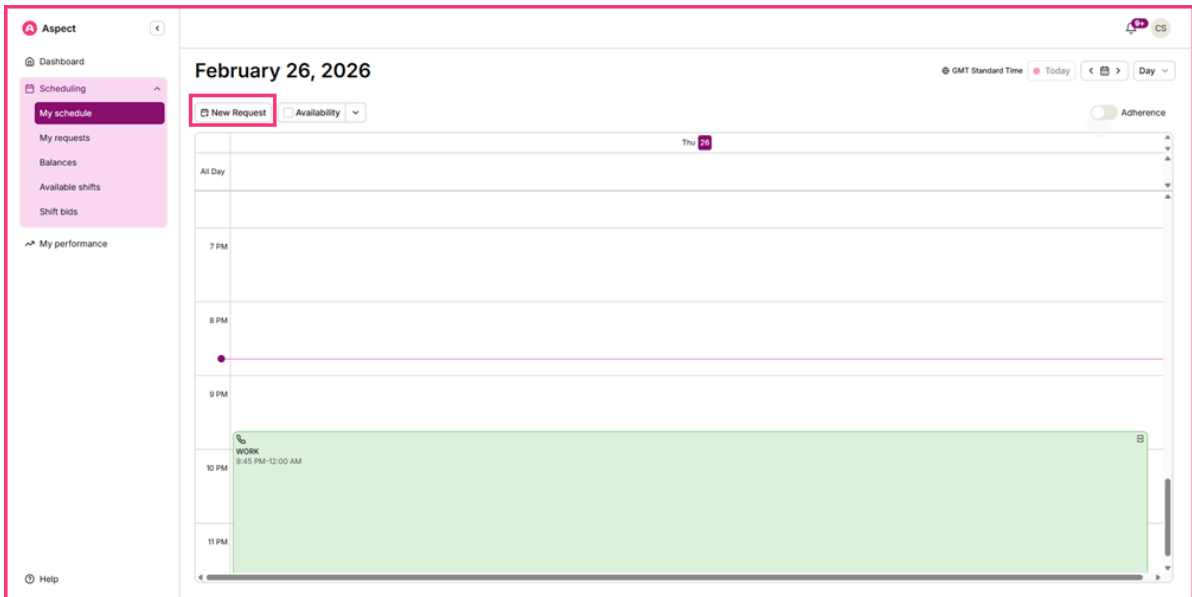


Figure 1-2

4. Click **Configure Activity Templates**.

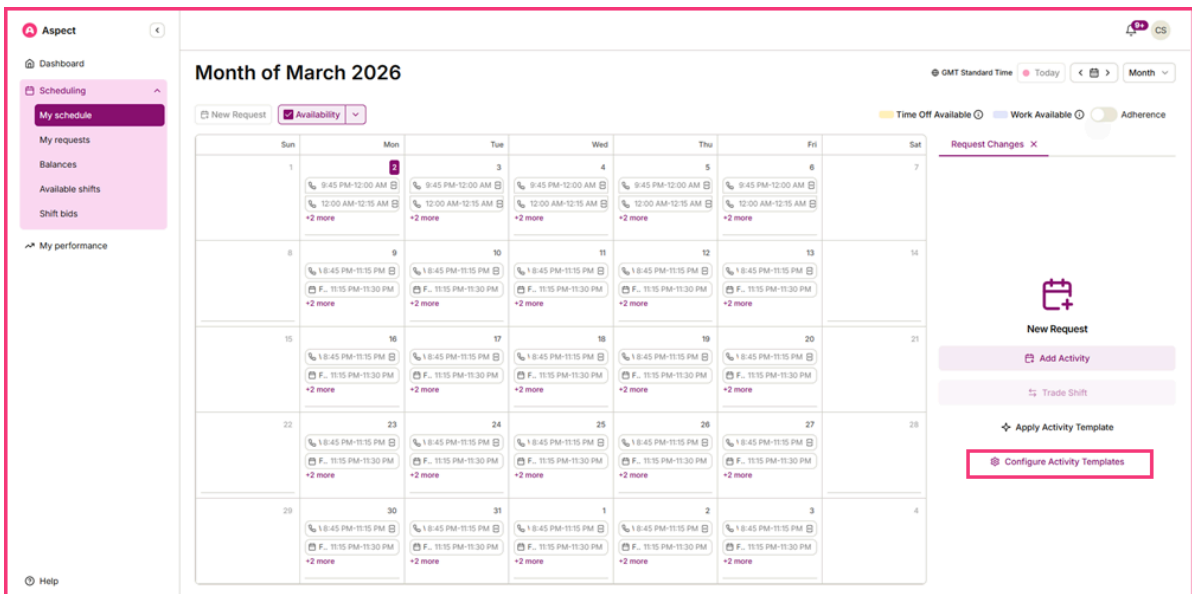


Figure 1-3

5. Complete the following fields in the **Activity Templates** window, then click **Save Template** and close the window when you are done:

- **Template Name:** Type a **Name** for the desired template.

- **Shift:** Select the **Work Days** for the preference and add the **Earliest** and **Latest** times you want to start and end the shift.
- **Activities:** Select an **Activity** for the template from the drop-down menu and add the **Earliest** and **Latest** times to start and end the Activity.
 - The available **Activity Types** will depend on your businesses configuration and your uniquely defined user permissions.
 - Click the **Trash** icon to delete the Activity Preference or click the **Duplicate** icon to clone the Activity Preference.
- **Repeating Activities:** Select a **Repeating Activity** for the template from the drop-down menu and add the **Earliest** and **Latest** times to start and end the Repeating Activity. Then add how often you want to **repeat** the activity and if you want to repeat it by **day, week, month, or year**. Then add a **Starts on** date and an **Ends on** date. Click the **Trash** icon to delete the Repeating Activity or click the **Duplicate** icon to clone the Repeating Activity.

Activity Templates

Configure your activity templates to automatically reorganize your schedule. ✕

LunchAndBreakfastTe...
✕

Preference 1

+ Add Template

Shift

Work Days: S S

Earliest: 08:00 AM Latest: 05:00 PM

Activities + Add Activity

Activity Type	Earliest	Latest
🕒 LUNCH - Unpaid break	🕒 12:00 PM	🕒 01:00 PM

Repeating Activities + Add Repeating Activity

Activity Type	Start	End
🕒 BREAK 1ST - First break	🕒 10:15 AM	🕒 10:30 AM

Repeat every: - 1 + Day Starts on: Mar 02, 2026 Ends on: Mar 06, 2026

Save Template

Figure 1-4

6. To edit an existing Activity Template, click **New Request > Configure Activity Templates**, select the Template you want to edit, make the desired edits, click **Save Template** and close the window when you are done.

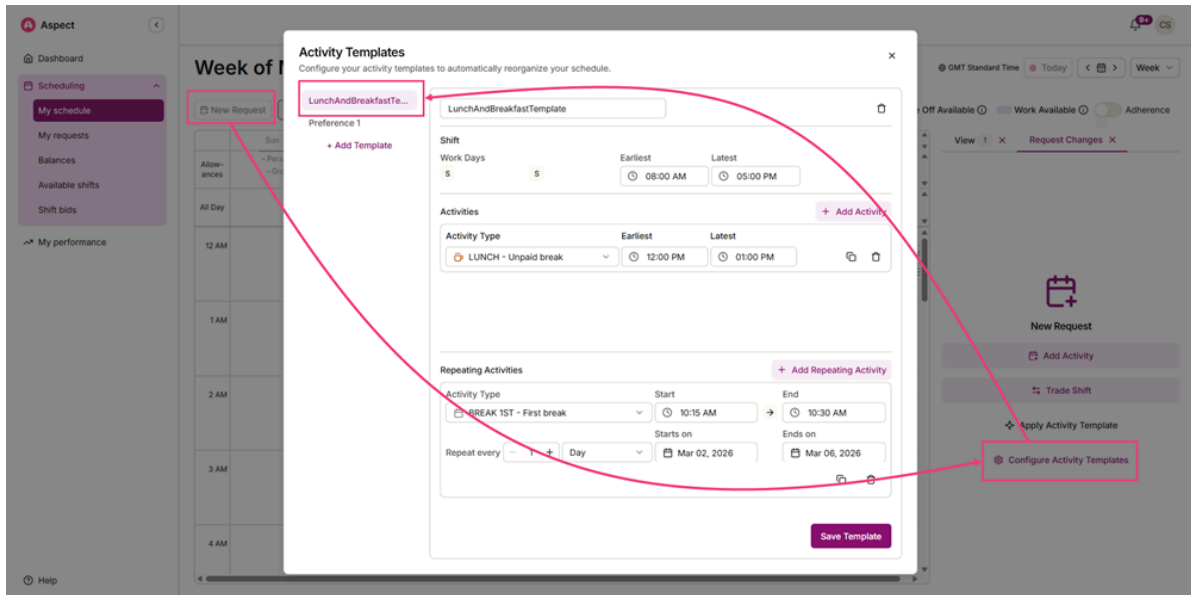


Figure 1-5

7. To apply an Activity Template, click **New Request** > **Apply Activity Template** and click the desired template.

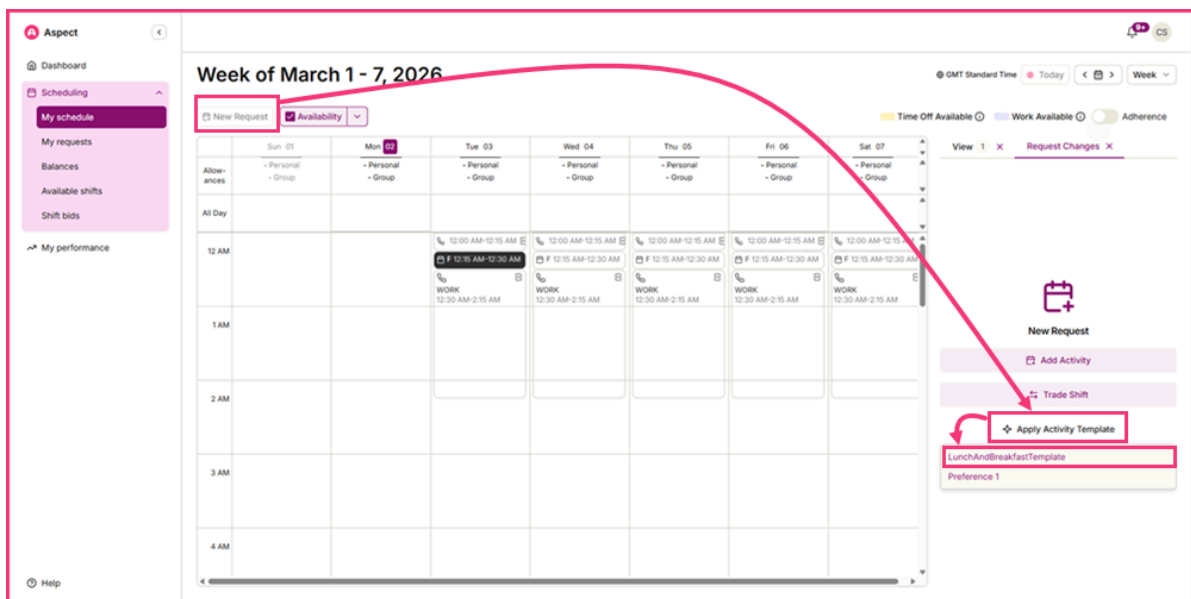


Figure 1-6

8. After the Activity Template is applied, the changes will automatically appear in the **View** panel. Click an **Activity Template Change** to expand

the details and make any edits. Repeat this step for all **Activity Template Changes**.

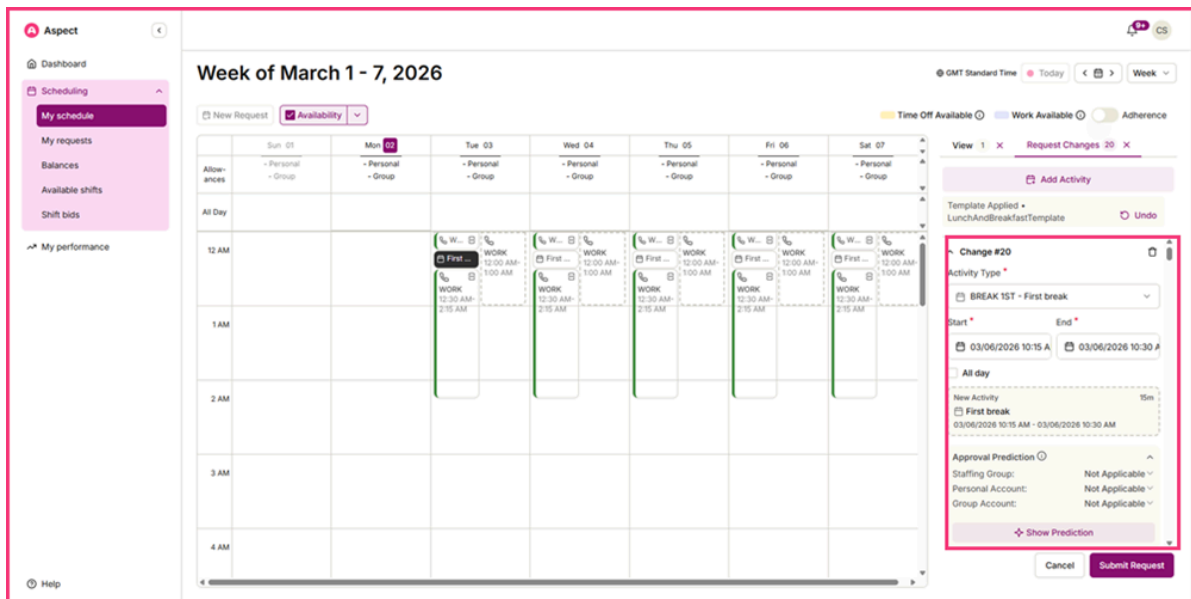


Figure 1-7

9. Scroll down and add a **comment** if needed. Expand **Additional Options**, select the check box next to **Allow partial approval** and click **Submit Request**.



Allowing partial approval gives the option for the requests to be approved by DATE, not by the individual change request. If some of the requests are not approved, edit the request changes appropriately and resubmit them.

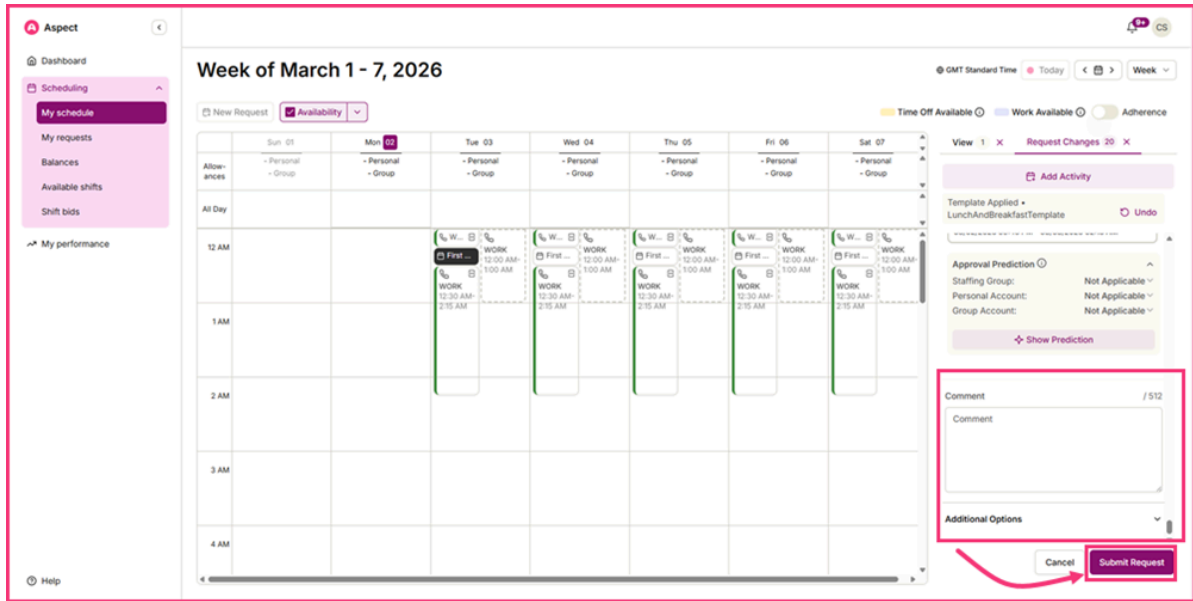


Figure 1-8

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▼ **Employee: Check Availability by Group or Account**

1. [Open the New Experience and log in.](#)
2. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**.

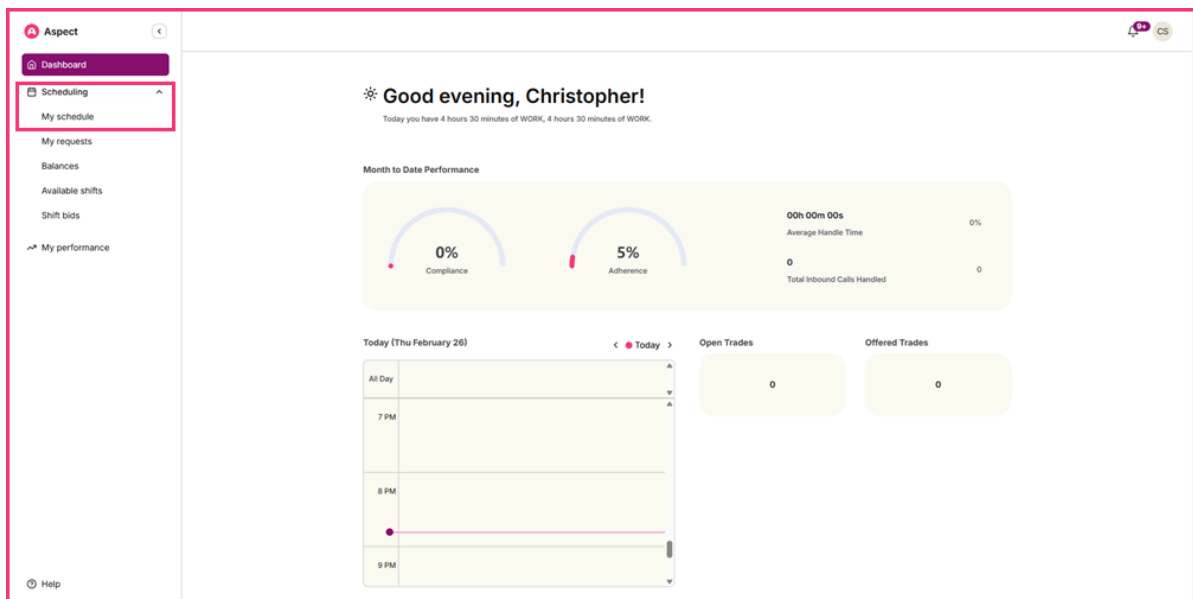


Figure 1-1

- Click the drop-down menu next to **Availability**, select the desired **Group** or **Account** from the availability layers, and select the **Availability** checkbox to display the latest availability balances.

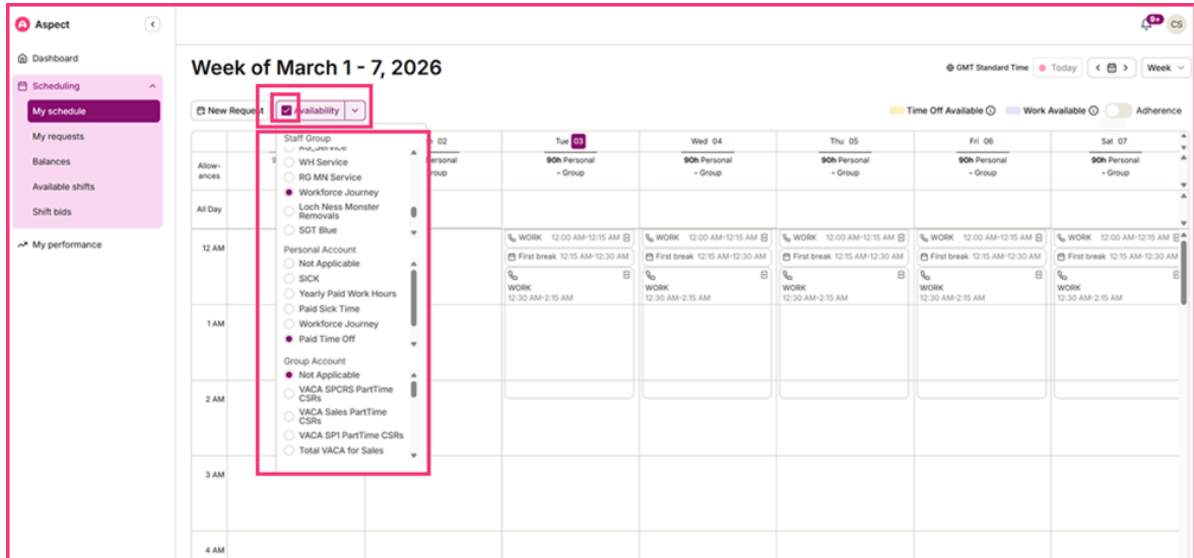


Figure 1-2

- The calendar display will automatically update to show the latest availability balances. Hover over an Activity or open shift to display more details about the availability balances.
 - Staffing group:** A color-coded calendar view that displays **Work Available** in purple and **Time Off Available** in yellow, reflecting current business needs. Hover over either **Work Available** or **Time Off Available** to display more information.
 - Personal Account:** Located at the top of the calendar display that shows the selected Personal Account's available time balance.
 - Group Allowance Account:** Located at the top of the calendar display and shows the selected Group Account's available time balance.

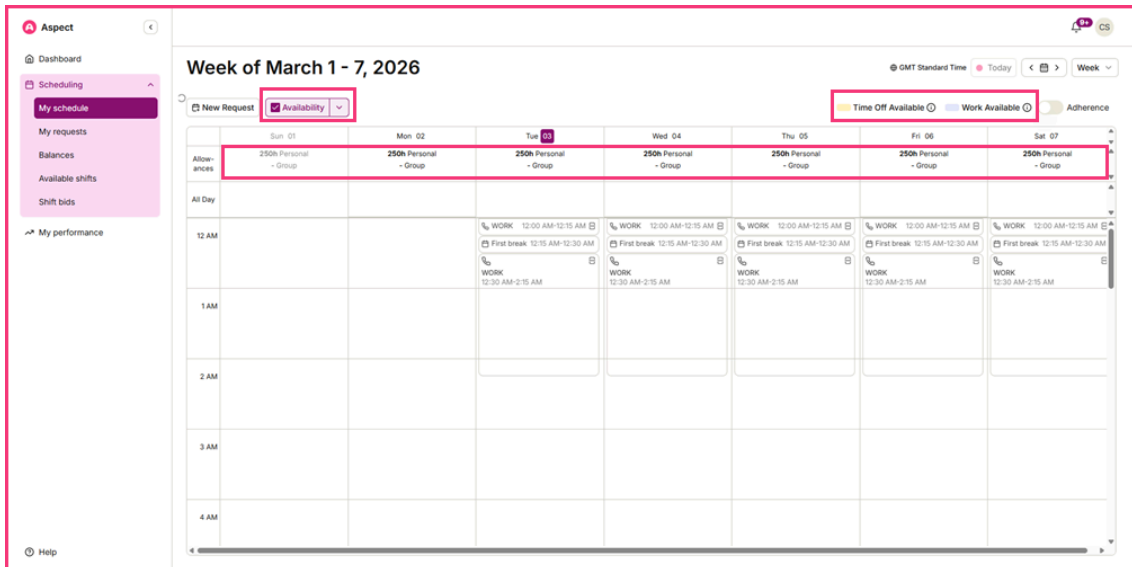


Figure 1-3



The My Balances table displays an employee's used, current, and future personal time balances in an easy-to-navigate format.

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▼ Employee: Submit a Change Request to an existing Activity with Approval Prediction

1. [Open the New Experience and log in.](#)
2. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**.

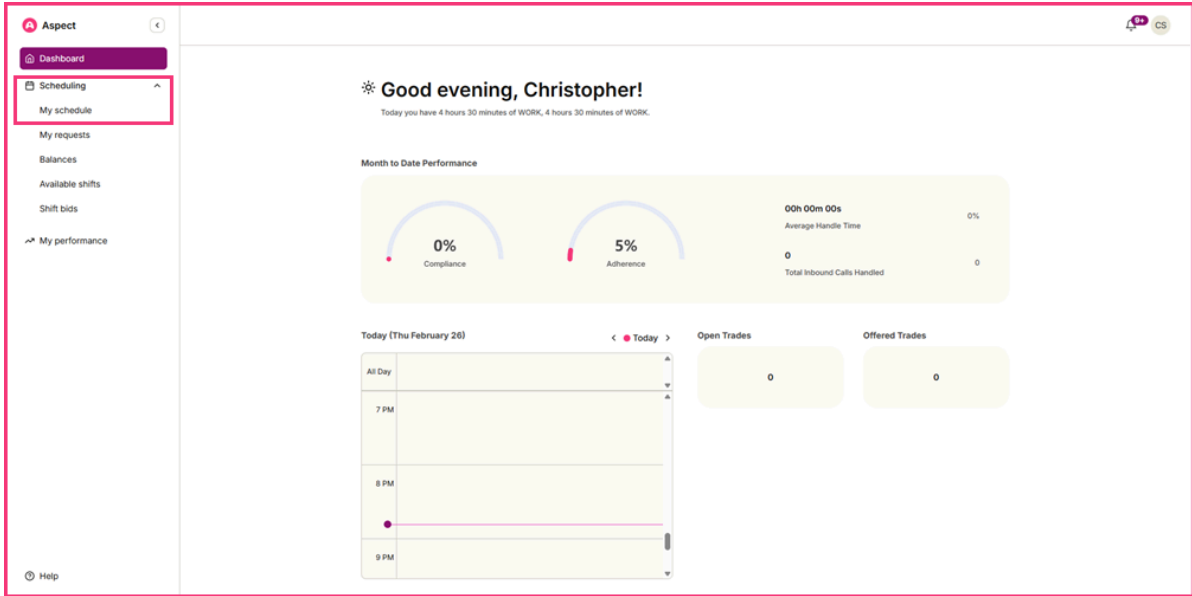


Figure 1-1

3. Click on the Activity you want to change and click **Edit**. The **New Request** window will appear on the right side of the screen. Optionally, you can drag and drop Change Requests.

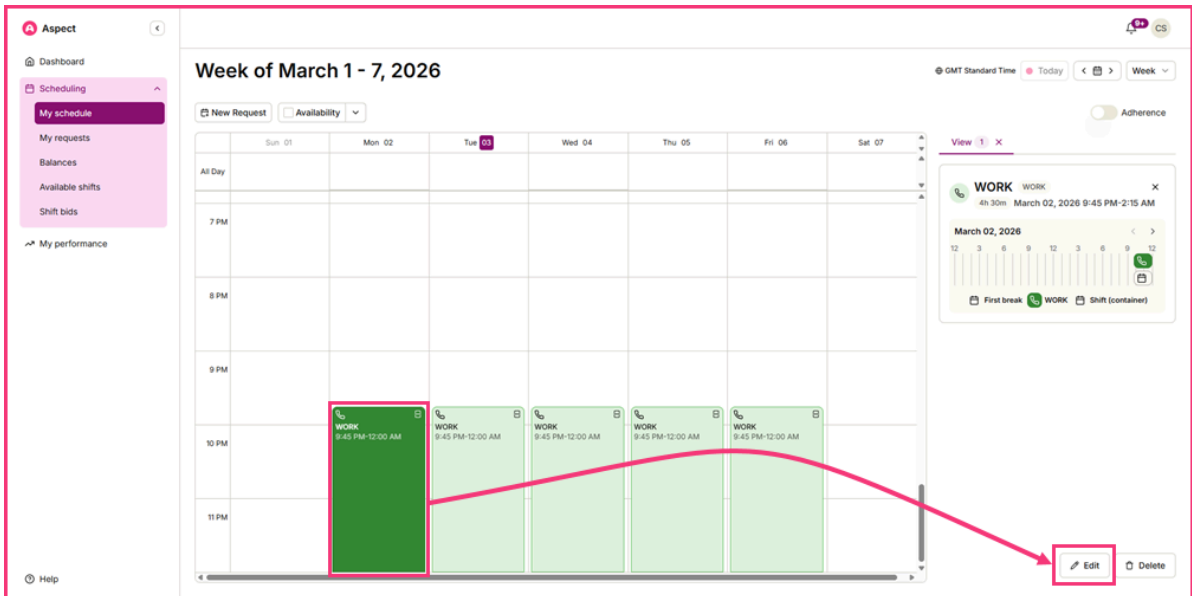


Figure 1-2

4. The new **Request Change** will be labeled **Change #1** on the right side of the screen. Select an **Activity** from the **Activity Type** drop-down menu. In

this example, **WORK** is selected.



The available **Activity Types** will depend on your businesses configuration and your uniquely defined user permissions.

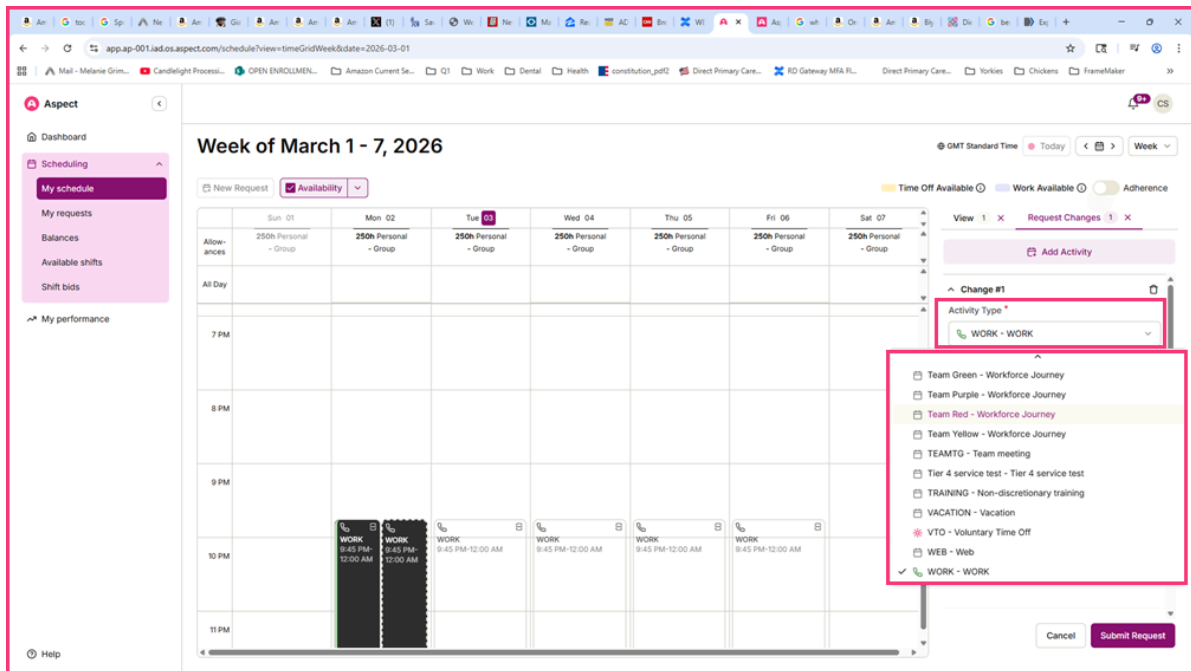


Figure 1-3

5. Click the **Start** field and use the calendar options to select the new shift date and start time. Click the **End** field to select the new shift date and end time.

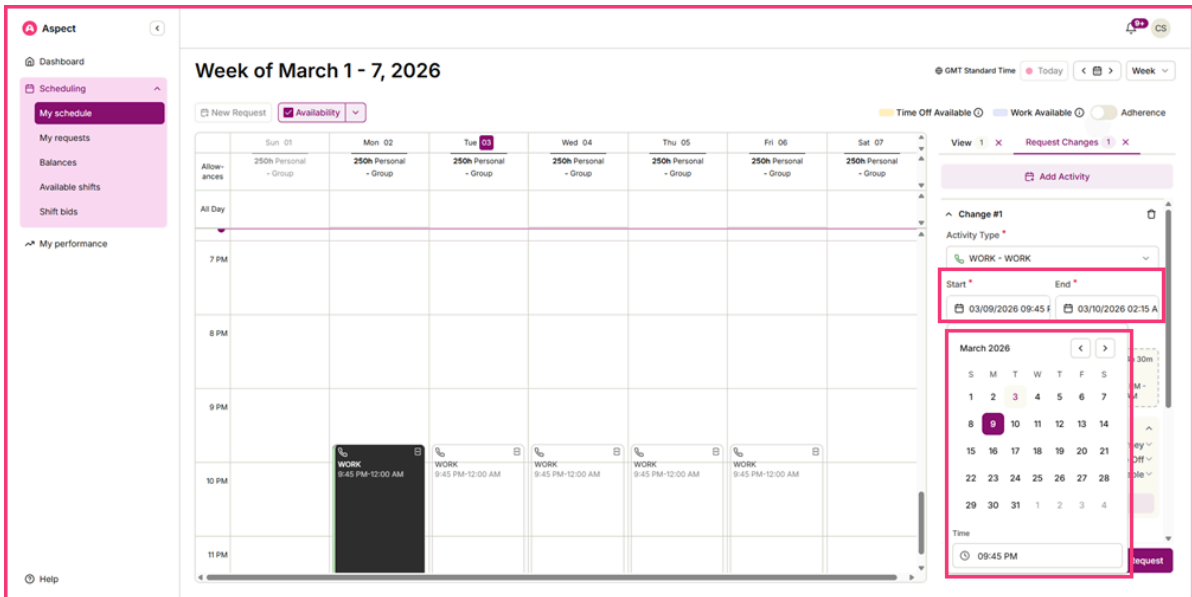


Figure 1-4

- After selecting the new shift date and times, you will see the **New Activity** appear in a container with a dotted line (this means it has not been approved yet). The **Original Activity** will remain highlighted and is also shown in the **View** panel.

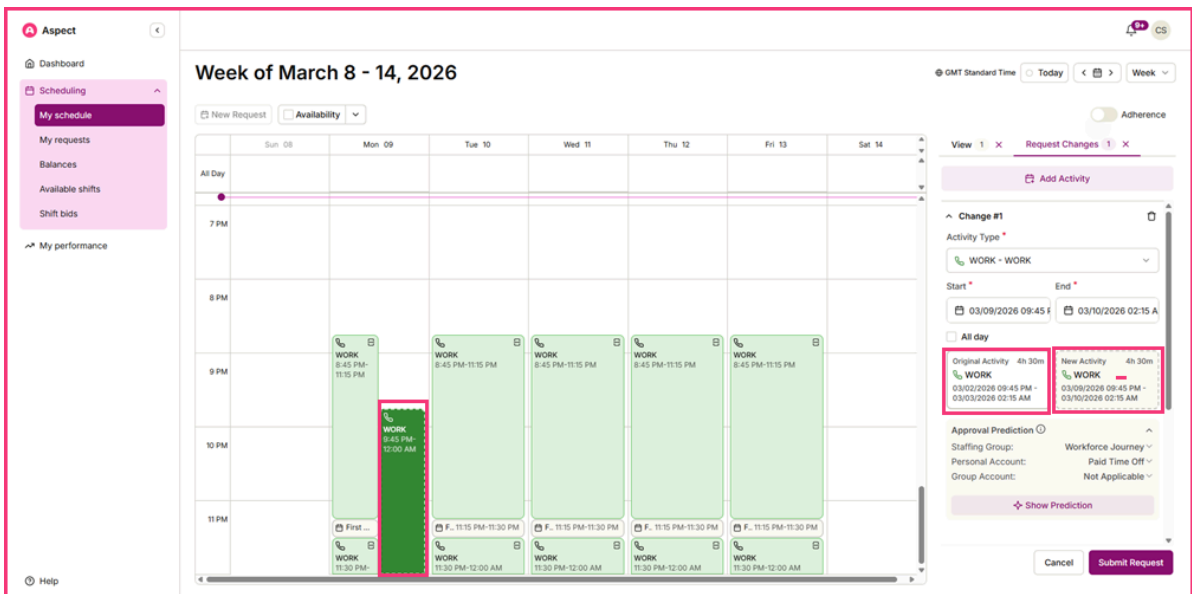


Figure 1-5

7. Expand **Approval Prediction**, select an option from the **Staffing Group**, **Personal Account**, or **Group Account** drop-down menus, and click **Show Prediction** to see the approval probability.

- This feature uses predictive analytics to determine if your request fits within your account's schedule balance. If your request prediction says **Likely to be approved**, then your request is compatible with your account's schedule balance. If your request prediction was disapproved, edit your request to a better suited date and time and resubmit (predictions are not 100% accurate and may change).

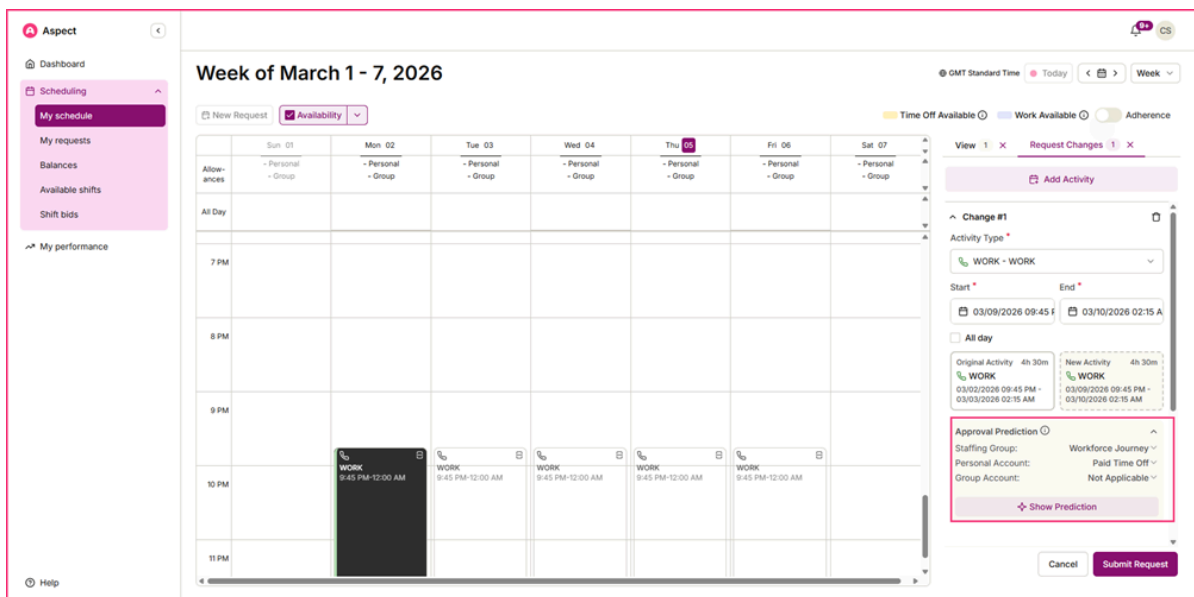


Figure 1-6

8. If the selected activity requires a container per segment, the **Container Type** option appears. Select the container you want from the **Container Type** drop-down list above the **Comment** section.



The system uses **Intelligent Container Detection** to determine when containers are needed, which type to use, and automatically adds them to schedule change requests based on WFM's Segment Entry Rules.

Some **Activity Types** may have an assigned segment container. If the selected activity type was defined in WFM, the **Container Type** option appears.

The screenshot displays the Aspect Scheduling interface. On the left is a navigation menu with options like 'Dashboard', 'Scheduling', 'My schedule', 'My requests', 'Balances', 'Available shifts', and 'Shift bids'. The main area shows a weekly calendar for 'Week of March 8 - 14, 2026'. A 'New Request' dialog is open, and the 'Container type' dropdown is expanded, showing options like 'Shift (container)', 'Overtime Sales', 'OT WEB', 'OT EMAIL', 'Overtime (container)', and 'No Container'. A red arrow points from the 'Shift (container)' option in the dropdown to the 'Container type' field in the dialog.

Figure 1-7

9. Optionally, add a comment and click **Submit Request**.

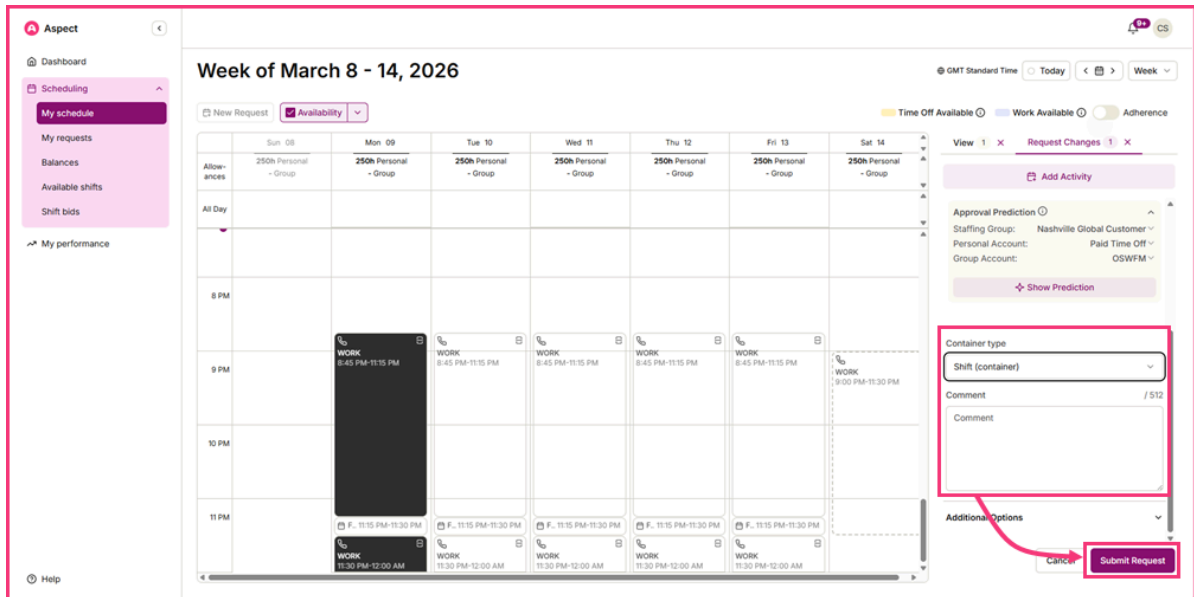


Figure 1-8

10. The request will be sent for evaluation. See the **Request Change** details on the right side of the screen. Check your notifications to see if the Request Change was approved or disapproved.

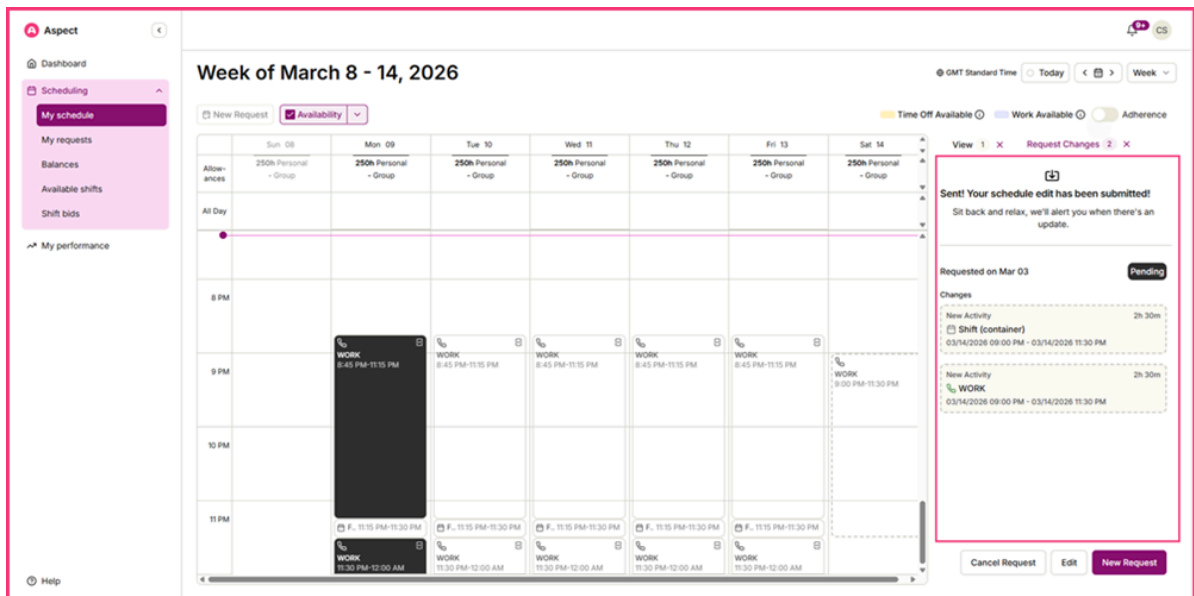


Figure 1-9

[Back to top](#)

▼ **Employee: Submit an Add Activity request with Approval Prediction**

1. Open the New Experience and log in.
2. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**.

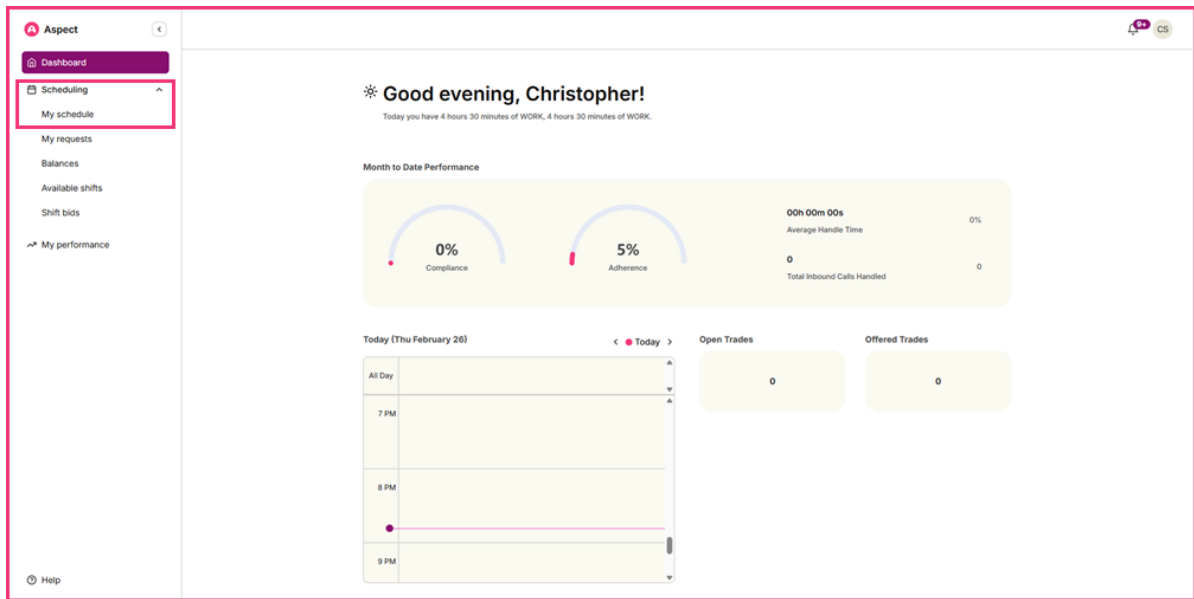


Figure 1-1

3. Click **New Request > Add Activity**.

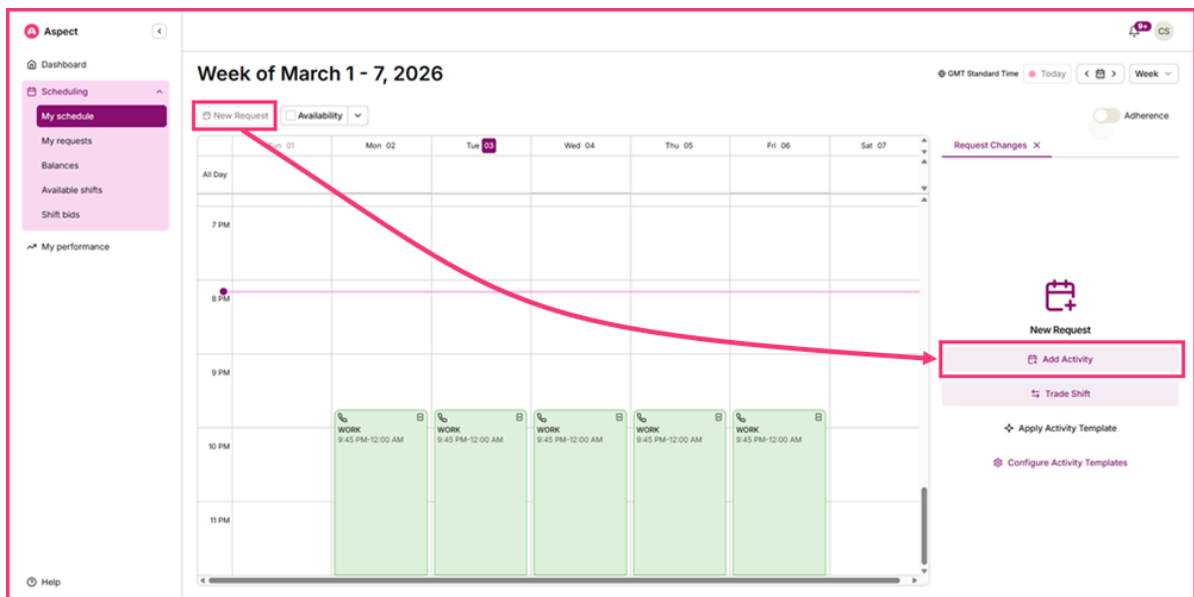



Figure 1-2

4. The New Activity will appear on the right side of the screen as **Change #1**. Select an **Activity** from the **Activity Type** drop-down menu. **Work** is selected in this example.

 The available **Activity Types** will depend on your businesses configuration and your uniquely defined user permissions.

5. Click the **Start** field and use the calendar options to select the **start date** and **start time** of the new Activity. Click the **End** field to select the **end date** and **end time** of the new Activity.
 - After selecting the new Activity date and times, you will see the **New Activity** appear in your schedule view with a dotted outline (this means it has not been approved yet).

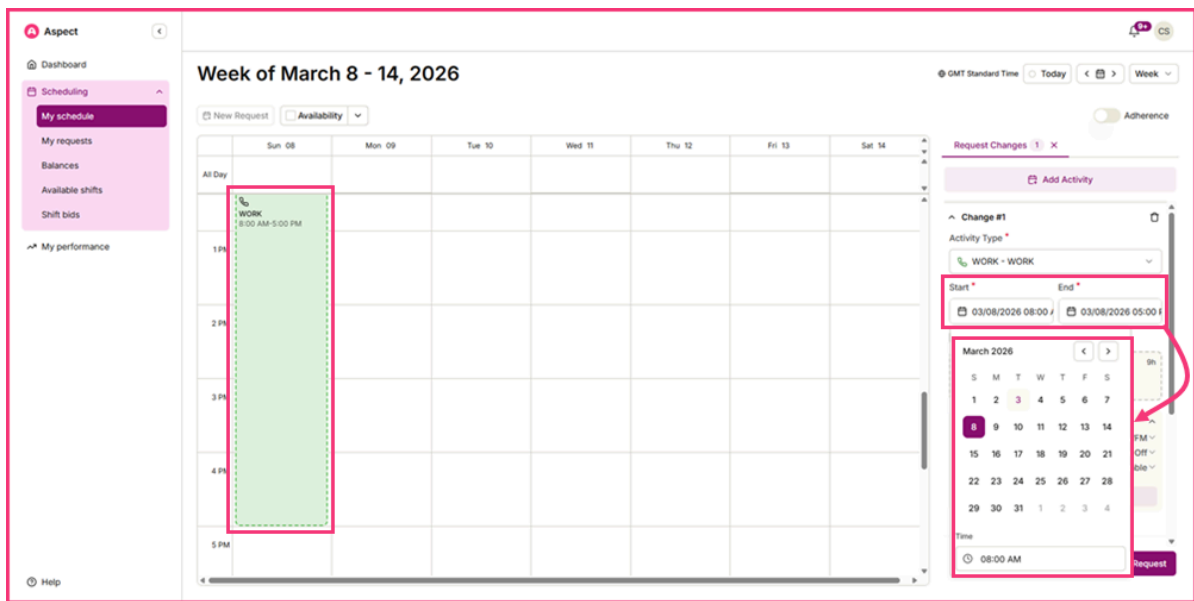


Figure 1-3

6. Expand **Approval Prediction**, select an option from the **Staffing Group**, **Personal Account**, or **Group Account** drop-down menus, and click **Show Prediction** to see the approval probability.
 - This feature uses predictive analytics to determine if your request fits within your account's schedule balance. If you're request prediction

says **Likely to be approved**, then your request is compatible with your account's schedule balance. If your request prediction was disapproved, edit your request to a better suited date and time and resubmit (predictions are not 100% accurate and may change).

5. If the selected activity requires a container per segment, the **Container Type** option appears. Select the container you want from the **Container Type** drop-down list above the **Comment** section.



The system uses **Intelligent Container Detection** to determine when containers are needed, which type to use, and automatically adds them to schedule change requests based on WFM's Segment Entry Rules.

Some **Activity Types** may have an assigned segment container. If the selected activity type was defined in WFM, the **Container Type** option appears.

6. Optionally, add a comment to the request and then click **Submit Request**.

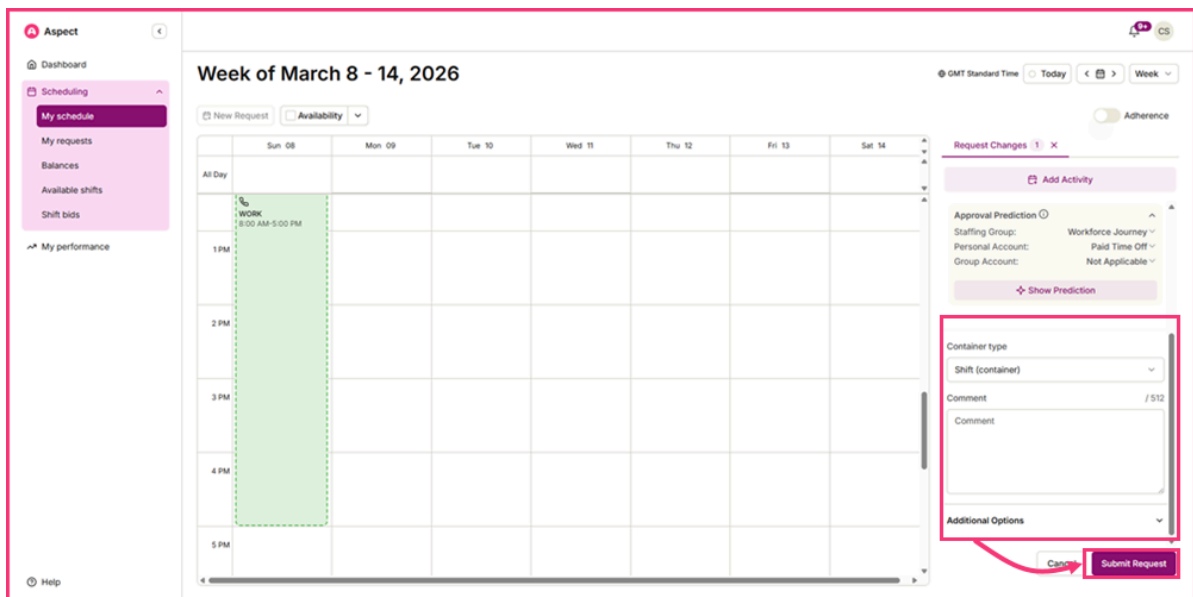


Figure 1-4

9. The request will be sent for evaluation. See the **Request Change** details on the right side of the screen. Check your notifications to see if the New

Activity was approved or disapproved.

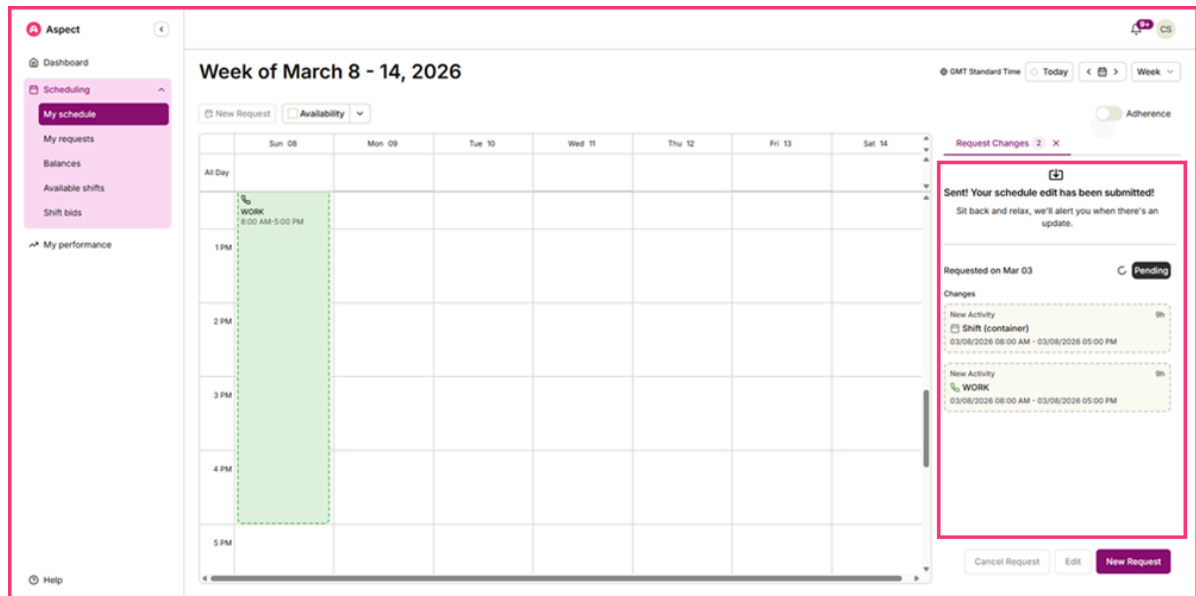


Figure 1-5

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▼ Employee: Submit multiple Change Requests at once

1. [Open the New Experience and log in.](#)
2. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**.

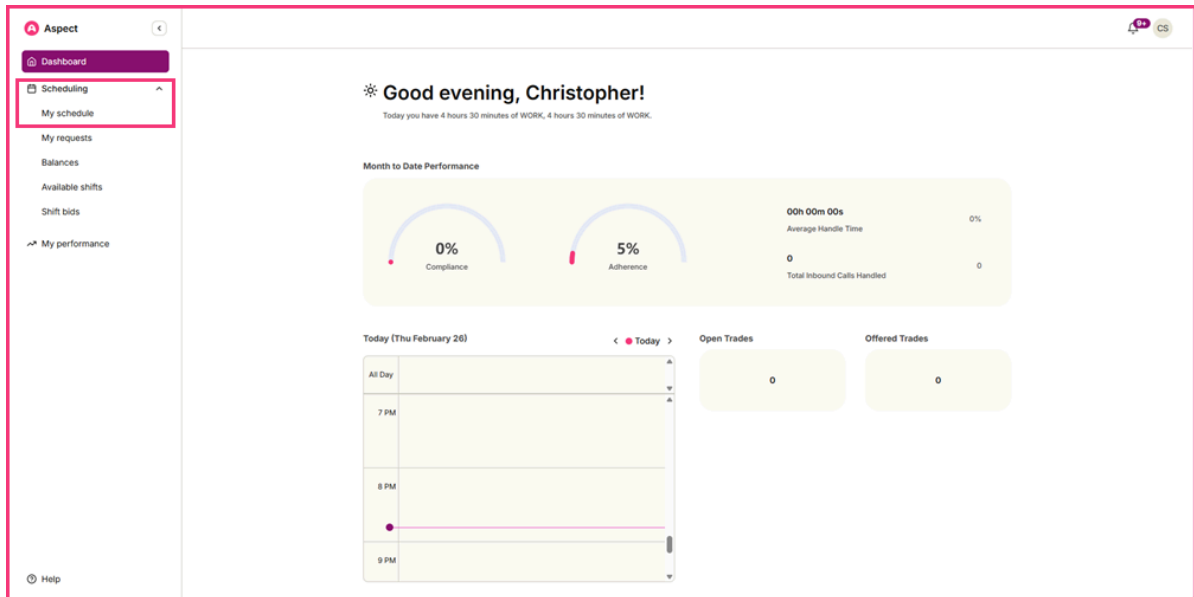


Figure 1-1

3. Prepare an Add Activity request or a Change Request for an existing shift as **Change #1**, but do **NOT** click **Submit Request**. Click **Add Activity**.



The system uses **Intelligent Container Detection** to determine when containers are needed, which type to use, and automatically adds them to schedule change requests based on WFM's Segment Entry Rules.

Some **Activity Types** may have an assigned segment container. If the selected activity type was defined in WFM, the **Container Type** option appears.

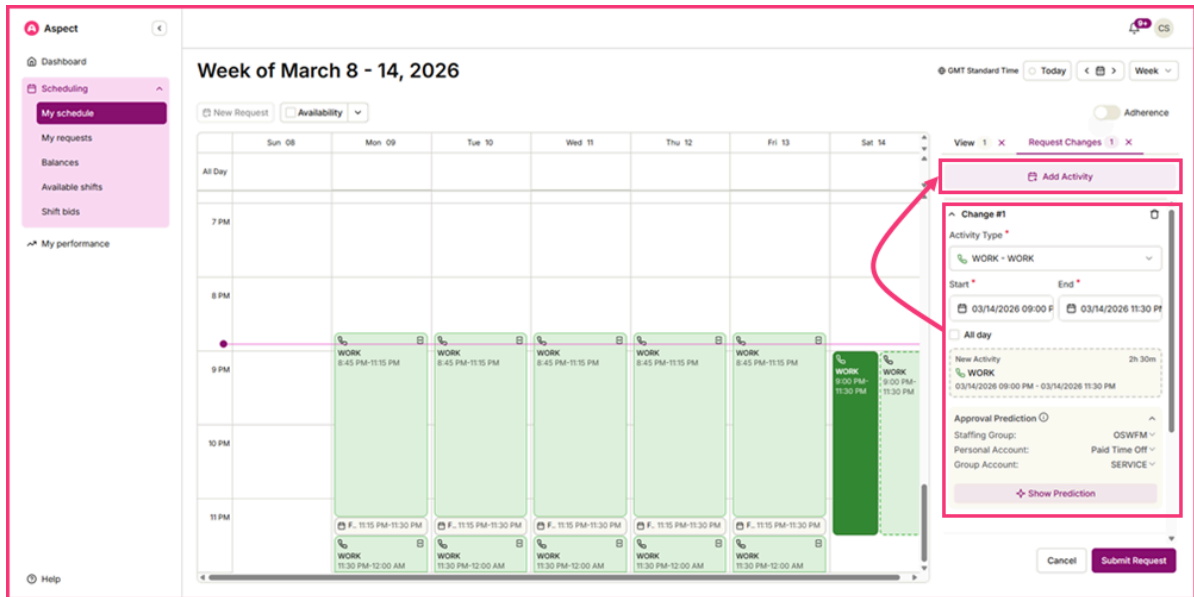


Figure 1-2

4. Minimize **Change #1** so you can see **Change #2** on the right side of the screen, then complete the fields for your **Change #2** request. Repeat steps 2-3 to prepare as many change requests as you need.

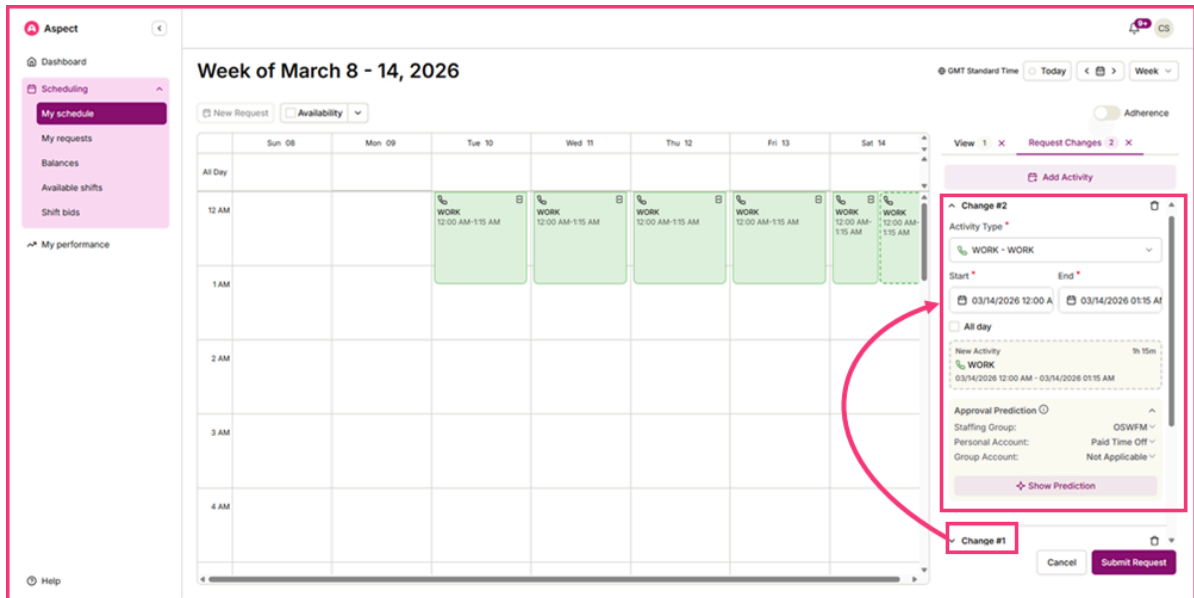


Figure 1-3

5. Minimize all Change Requests and add a comment if needed. Optionally, expand **Additional Options** and select the check box next to **Allow partial**

approval. Click **Submit Request**.



Allowing partial approval gives the option for the requests to be approved by DATE, not by the individual change request. If some of the requests are not approved, edit the request changes appropriately and resubmit them.

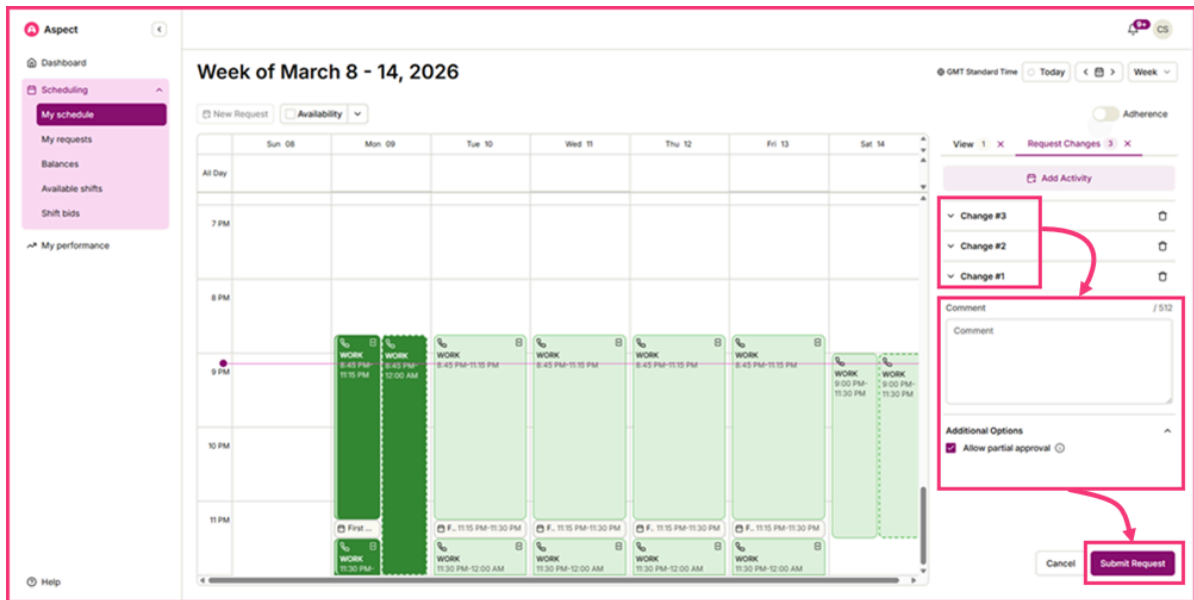


Figure 1-4

6. The request will be sent to your manager for approval. See the Change Request details on the right side of the screen. Check your notifications to see if the new request was approved or disapproved.

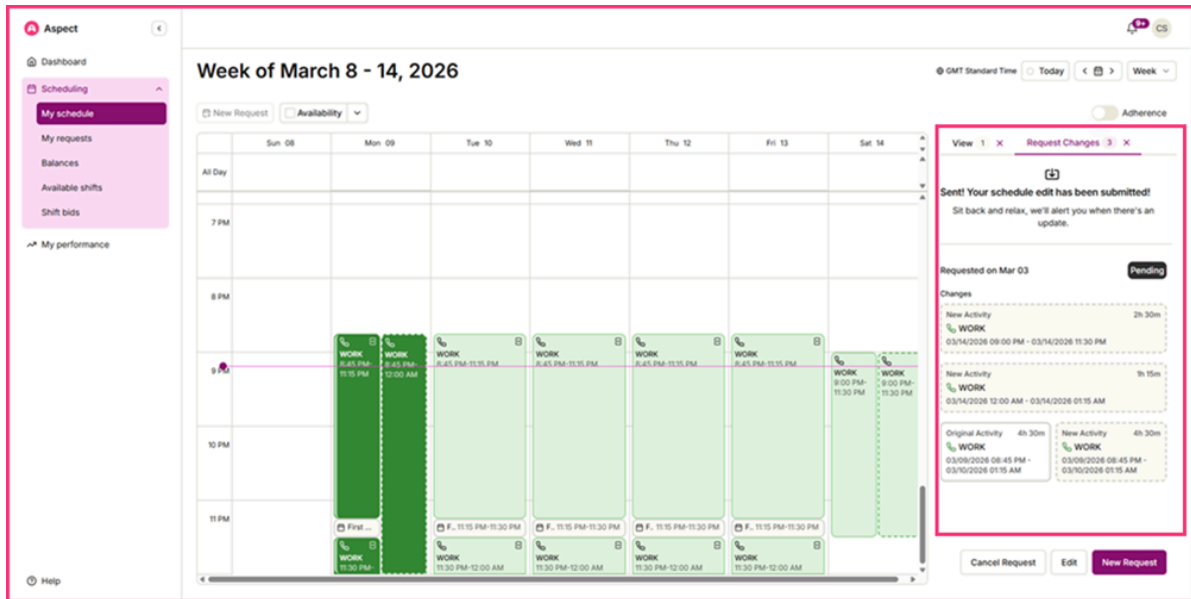


Figure 1-5

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▼ **Employee: Use the drag and drop feature when editing your schedule**

1. Open the New Experience and log in.
2. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**.

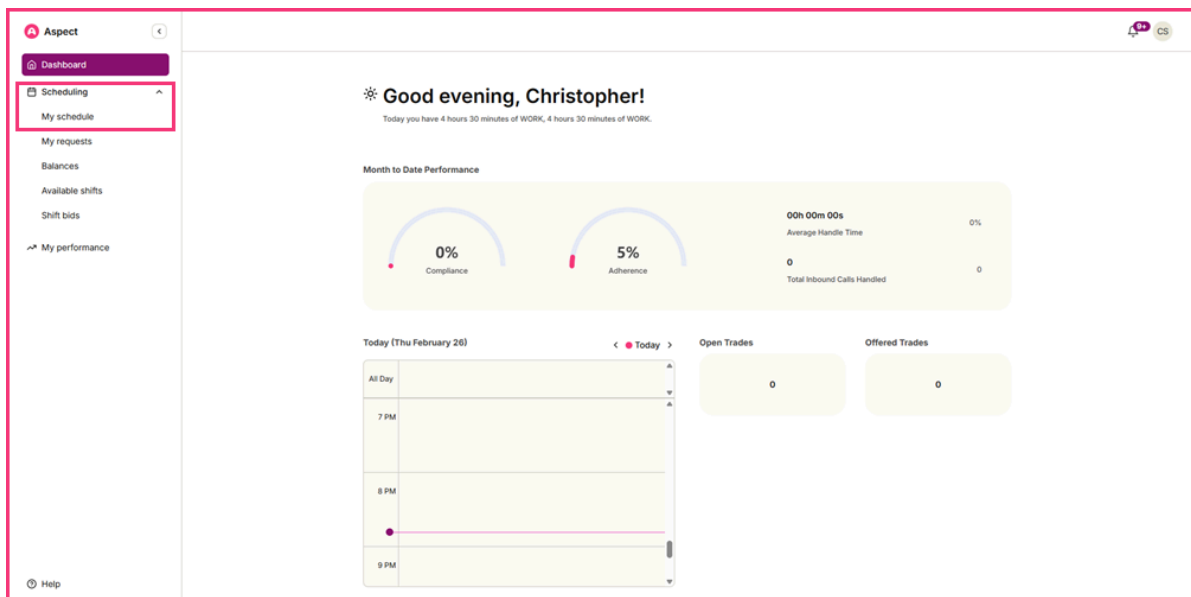


Figure 1-1

3. Click and hold on the Activity that you want to move.

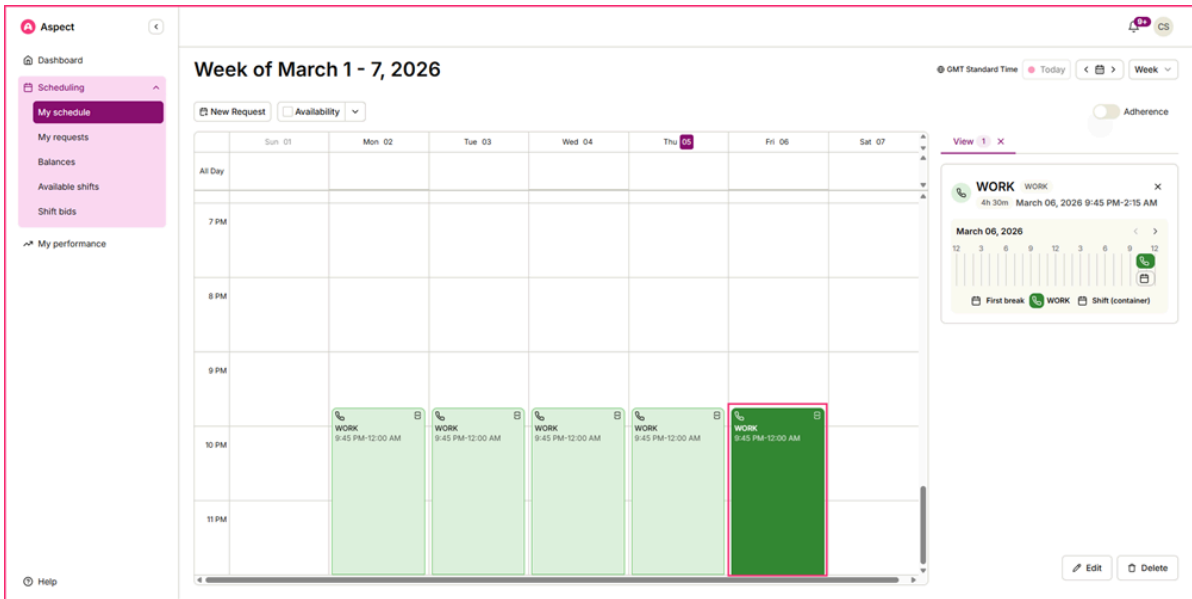


Figure 1-2

4. Drag the Activity to the desired location and drop it by releasing the click.

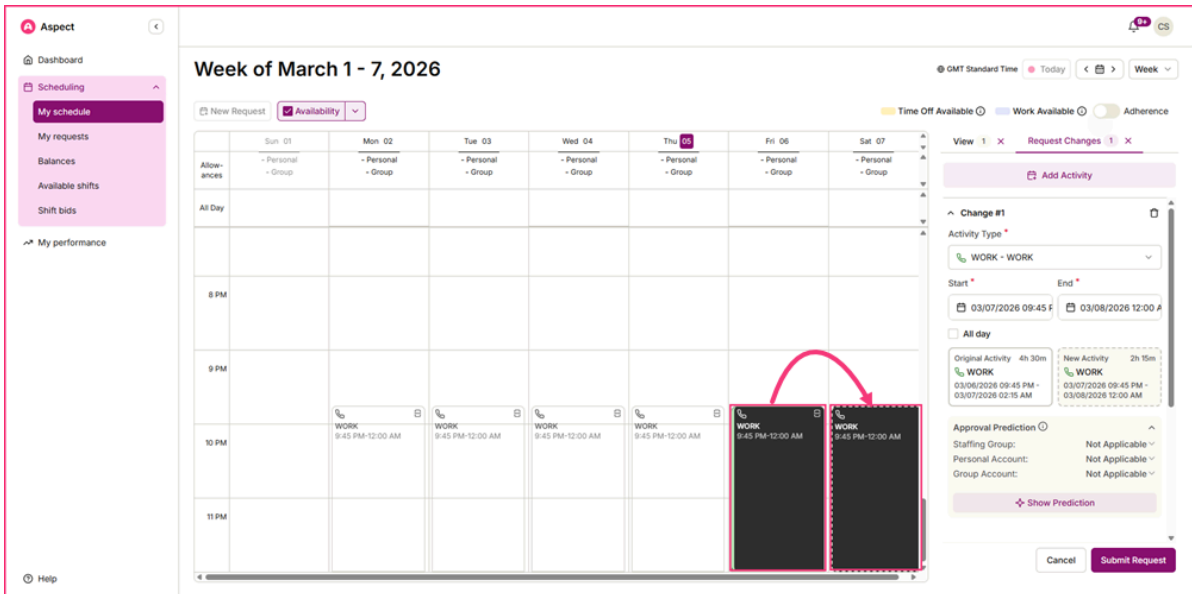


Figure 1-3

5. The **Request Change** panel will appear and the details will display on the right side of the screen.

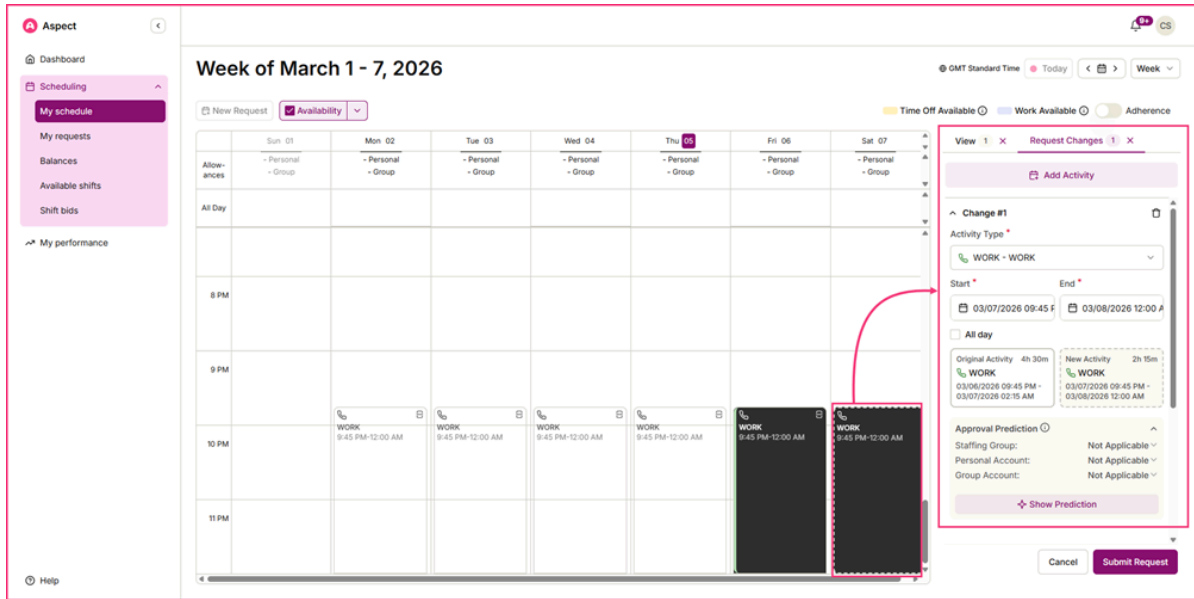


Figure 1-4

6. Click the border of the any Activity to drag the timeframe up or down.

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▼ **Employee: Submit a Shift Trade request**



With Shift Trading, employees can offer their scheduled shifts to coworkers through one-way trades. This feature works with existing WFM trade processes and rules, keeping employees updated through notifications about their trade status. We suggest employees work out the trade request details offline before submitting the request.

1. Open the New Experience and log in.
2. Click **Scheduling** from the left panel and from the drop down select **My schedule**.
3. Click **New Request >Trade Shift**.

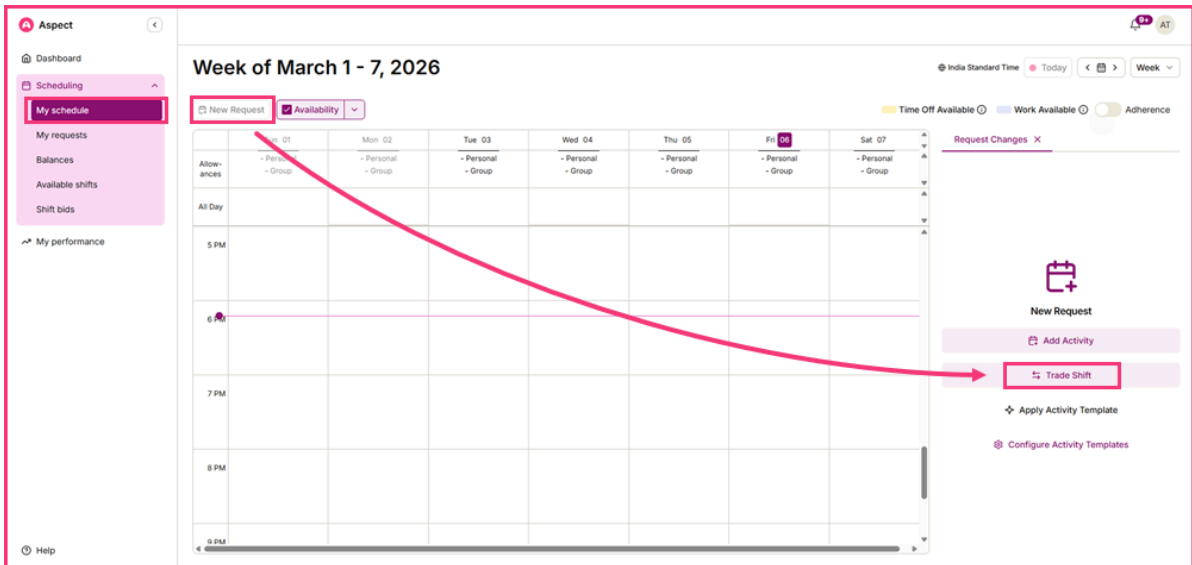


Figure 1-1

4. Click **I want to offer my shift to someone** and click **Continue**.

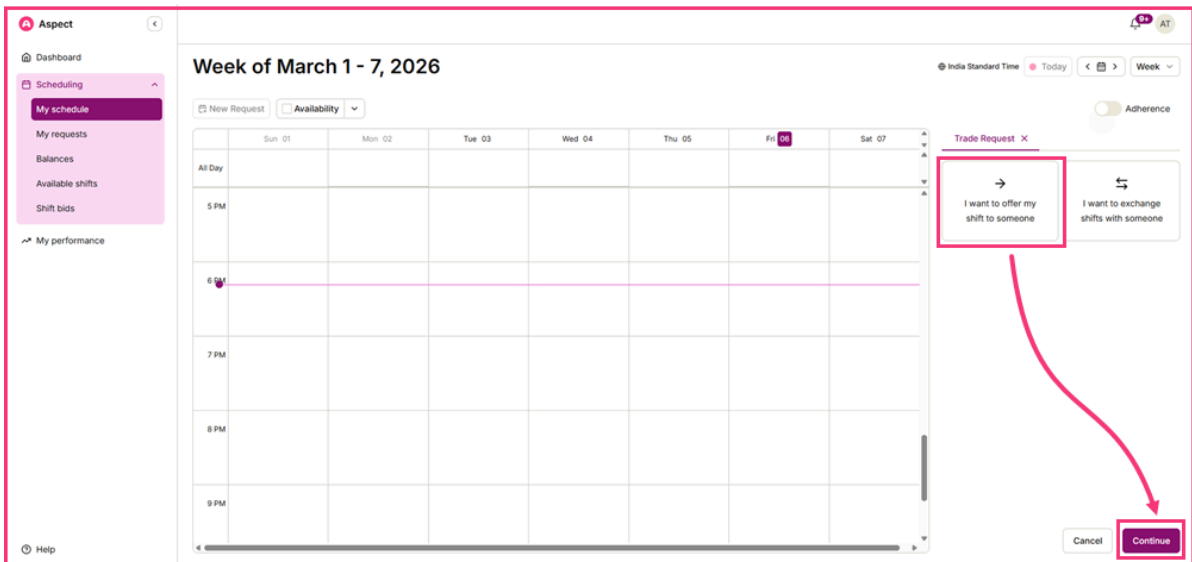


Figure 1-2

5. In the **Trade Request** panel, complete the steps below and click **Continue**.

- In the **Start** and **End** fields, click the **date-selector** to choose the date and times for the shift you want to trade.
- Deselect the **All day** checkbox if you want to trade a part of your shift.

- The New Experience supports selecting a range covering all or parts of a shift across multiple days (for example, All day—June 11 to June 14, or June 11 at 1:00 PM to June 12 at 11:00 AM).
- Depending on your organization's activity handling rules in Aspect Workforce, all-day activities (such as Vacation) may not be tradeable even though they appear in the preview.

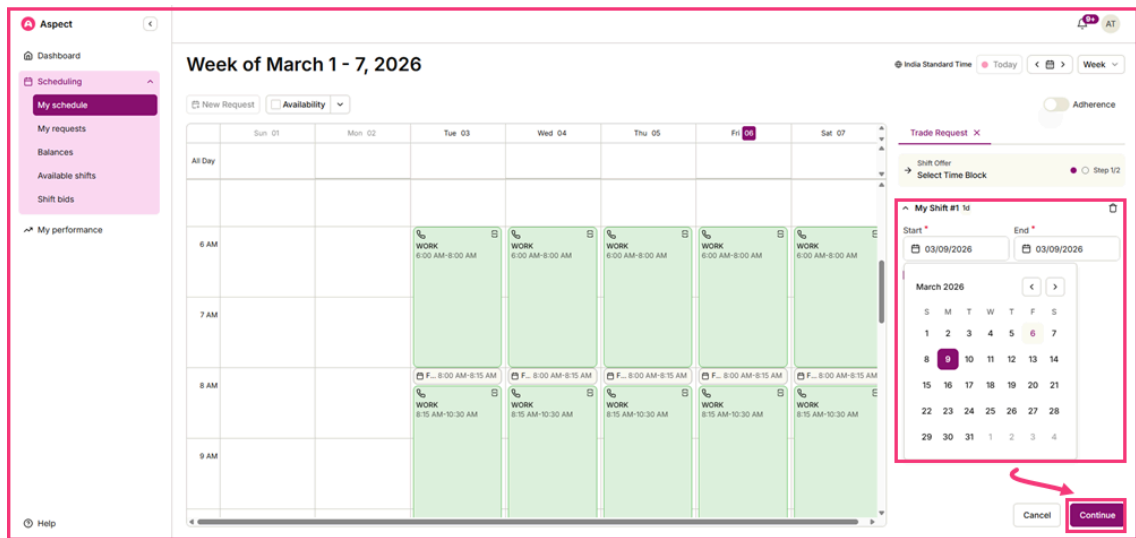


Figure 1-3

6. Click **With an Agent** to trade your shift directly with a specific employee. Click Post to Trade board if you want to post your shift trade to the Trade board. In this example, we selected **With an Agent**.

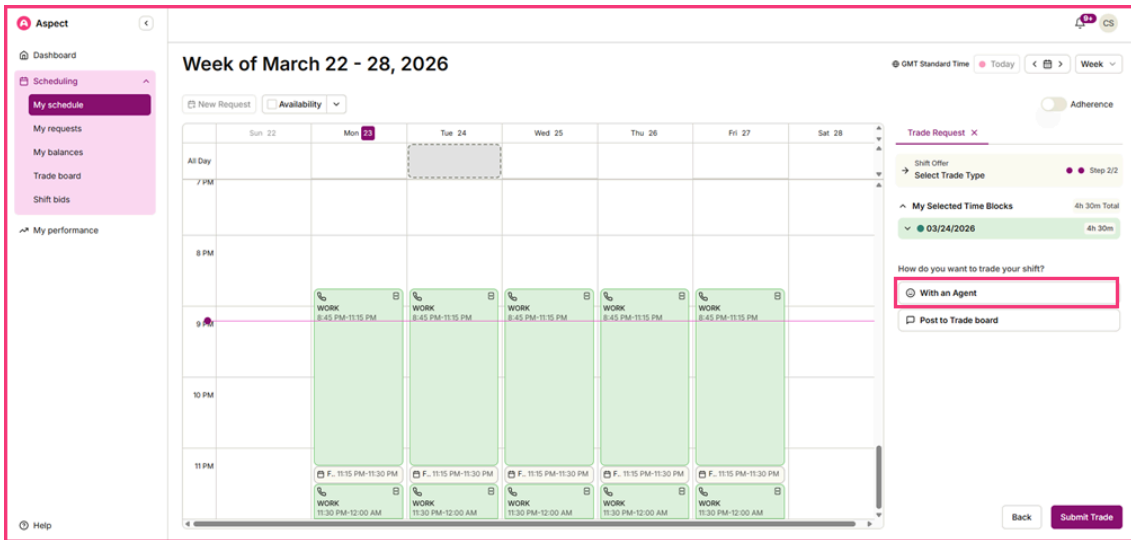


Figure 1-4

- The **Select Co-Worker** section will appear. In the **Who would you like to trade with?** field, enter the email of the person you want to trade shifts with, then click the **search icon** and select the employee.



An employee can send multiple Shift Trade requests for the same day to multiple employees. The first employee to accept a request for a that day will receive the shift. The trade requests for the other employees will be voided.

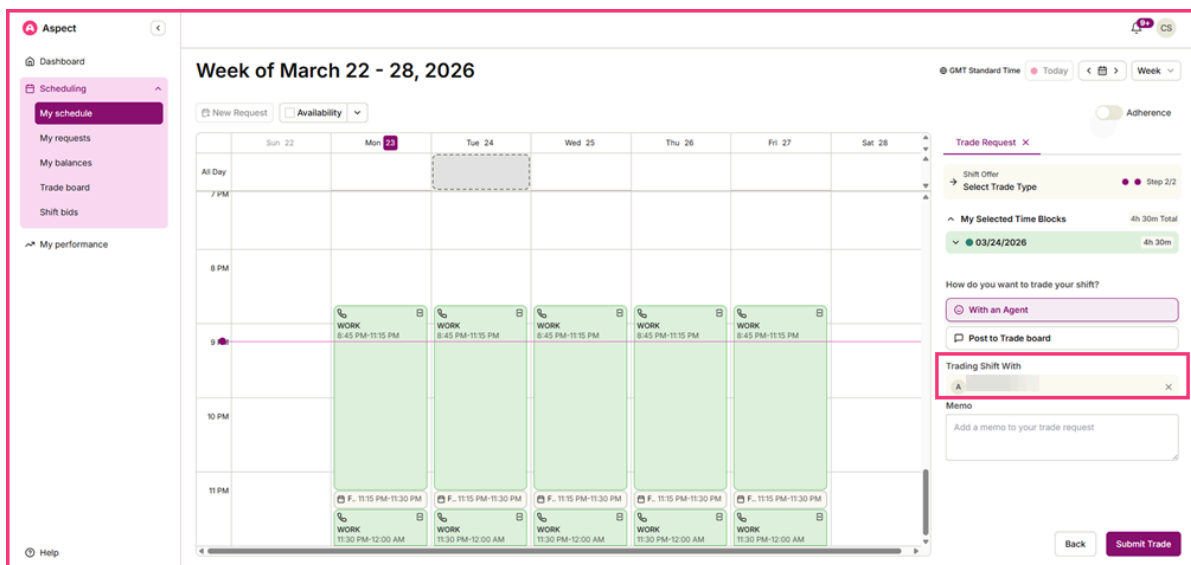


Figure 1-5

- A sample employee lookup is shown below.

How do you want to trade your shift?

With an Agent

Post to Trade board

Who would you like to trade with?

Figure 1-6

8. In the **Memo** field, enter a brief note explaining the reason for the trade, then click **Submit Trade**. A confirmation message will appear to let you know your trade request was submitted successfully. A trade may be unsuccessful if it violates a business rule.

Aspect

Dashboard

Scheduling

- My schedule
- My requests
- My balances
- Trade board
- Shift bids

My performance

Week of March 22 - 28, 2026

GMT Standard Time Today < > Week

New Request Availability

	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Fri 27	Sat 28
All Day							
7 PM							
8 PM							
9 PM		WORK 8:45 PM-11:15 PM	WORK 8:45 PM-11:15 PM	WORK 8:45 PM-11:15 PM	WORK 8:45 PM-11:15 PM	WORK 8:45 PM-11:15 PM	
10 PM							
11 PM		F. 11:15 PM-11:30 PM	F. 11:15 PM-11:30 PM	F. 11:15 PM-11:30 PM	F. 11:15 PM-11:30 PM	F. 11:15 PM-11:30 PM	
		WORK 11:30 PM-12:00 AM	WORK 11:30 PM-12:00 AM	WORK 11:30 PM-12:00 AM	WORK 11:30 PM-12:00 AM	WORK 11:30 PM-12:00 AM	

Trade Request X

Shift Offer

Select Trade Type ● Step 2/2

My Selected Time Blocks 4h 30m Total

- 03/24/2026 4h 30m

How do you want to trade your shift?

With an Agent

Post to Trade board

Trading Shift With

A

Memo

Add a memo to your trade request

Figure 1-7

9. The Shift Trade request is now in **Pending** status. Here are the different Shift Trade request statuses and what they mean.

The screenshot displays the Aspect Cloud Workforce interface. On the left is a navigation sidebar with options: Dashboard, Scheduling (expanded), My schedule (selected), My requests, Balances, Available shifts, Shift bids, and My performance. The main area shows a calendar for the week of March 1-7, 2026, with a grid of time slots from 6 AM to 9 AM. A shift trade request is visible for Friday, March 6th, from 6:00 AM to 8:00 AM. A modal window is open on the right, titled "Sent! Your shift trade has been submitted!". The modal contains the following text: "C [redacted] will receive a notification for this request. We will update you when it is processed." Below this, it shows "Requested on 03/06" with a "Cancel" button. It also displays "My Selected Time Blocks Total 1st" and "03/09/2026 All Day". At the bottom of the modal are "Make Another Request" and "Cancel Request" buttons.

Figure 1-8



Shift Trade request statuses are updated automatically.

- **Pending:** The Shift Trade request is processing but not yet in sync with the WFM database. The request cannot be cancelled in this status.
- **Open:** The Shift Trade request is currently open and can be canceled. A **Cancel Trade** button appears at the end of the trade summary.
- **Accepted:** The Shift Trade request has been accepted by the receiver, but is not yet official and still must go through WFM processing.
- **Declined:** The Shift Trade request was declined by the receiver.
- **Official:** The Shift Trade request has been accepted and completed WFM processing.
- **Failed:** The Shift Trade request failed to process through the WFM rules successfully.
- **Voided:** The Shift Trade request was accepted by one receiver, which automatically voids it for any other employees who received it.
- **Cancelled:** The Shift Trade request was cancelled by the sender.

- See how to [cancel a Shift Trade request](#).
- See how to [accept or decline Shift Trade request Notifications](#).

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▼ **Employee: Submit a Shift Exchange request**



With Shift Exchanges, employees can send or receive shifts for specific desired times. This feature allows employees to select shifts and specify their preferred exchange times through an interactive calendar interface.

Depending on your organization's activity handling rules in Aspect Workforce, all-day activities (such as Vacation) may not be tradeable even though they appear in the preview.

1. Open the New Experience and log in.
2. Expand **Scheduling**, then select **My schedule** from the drop-down menu.

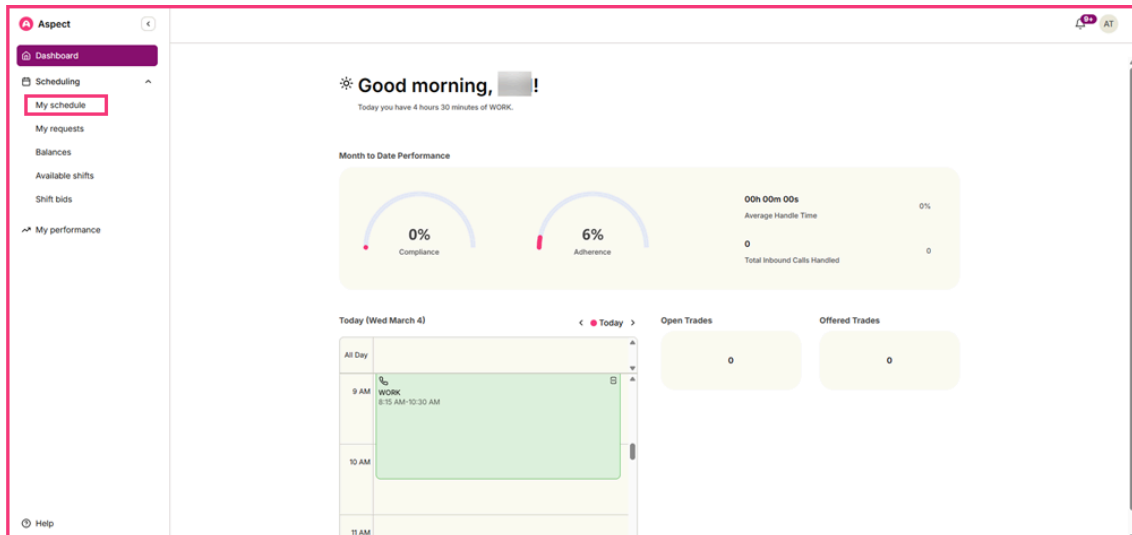


Figure 1-1

3. Click **New Request > Trade Shift.**

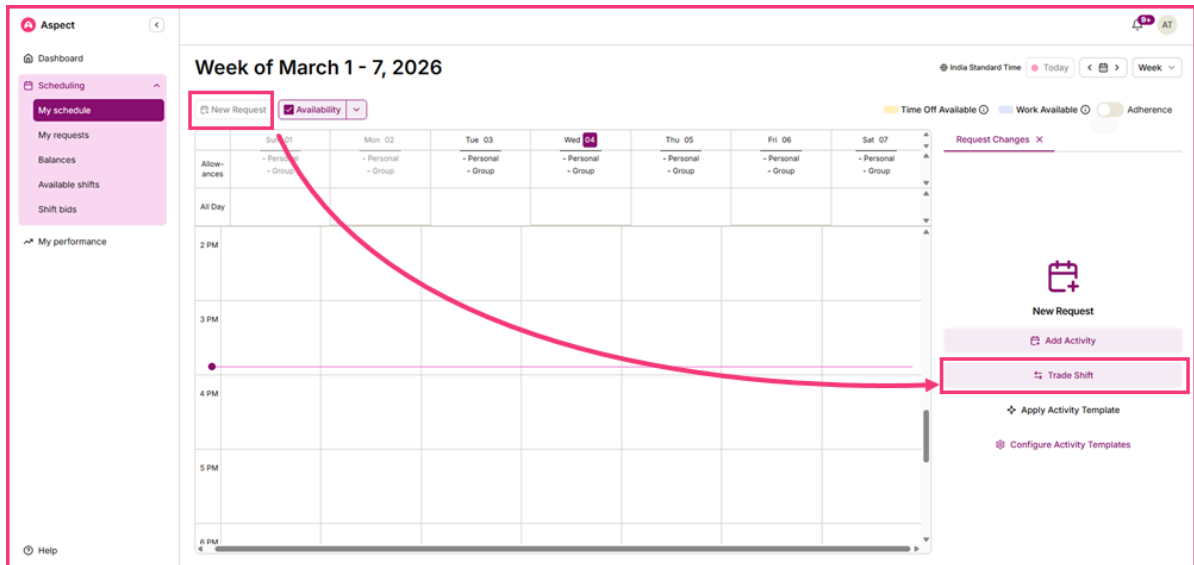


Figure 1-2

4. Click **I want to exchange shifts with someone** and click **Continue**.

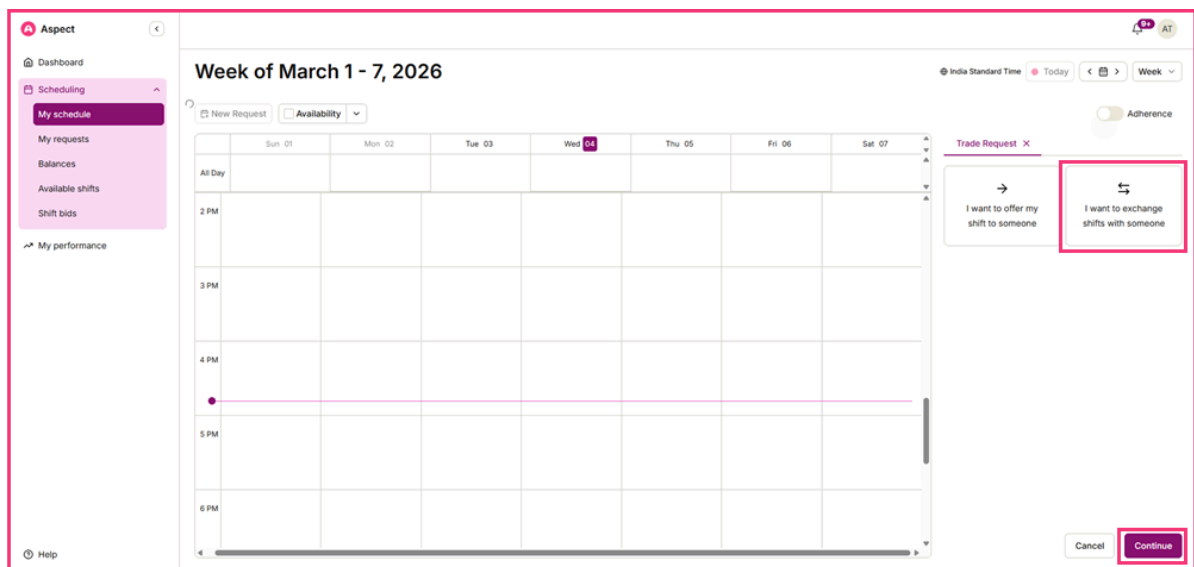


Figure 1-3

5. Under **My Shift #1**, in the **Start** and **End** calendar fields, select the dates and times for the shift you want to exchange. Select the **All day** checkbox if you want to trade your entire day shift.

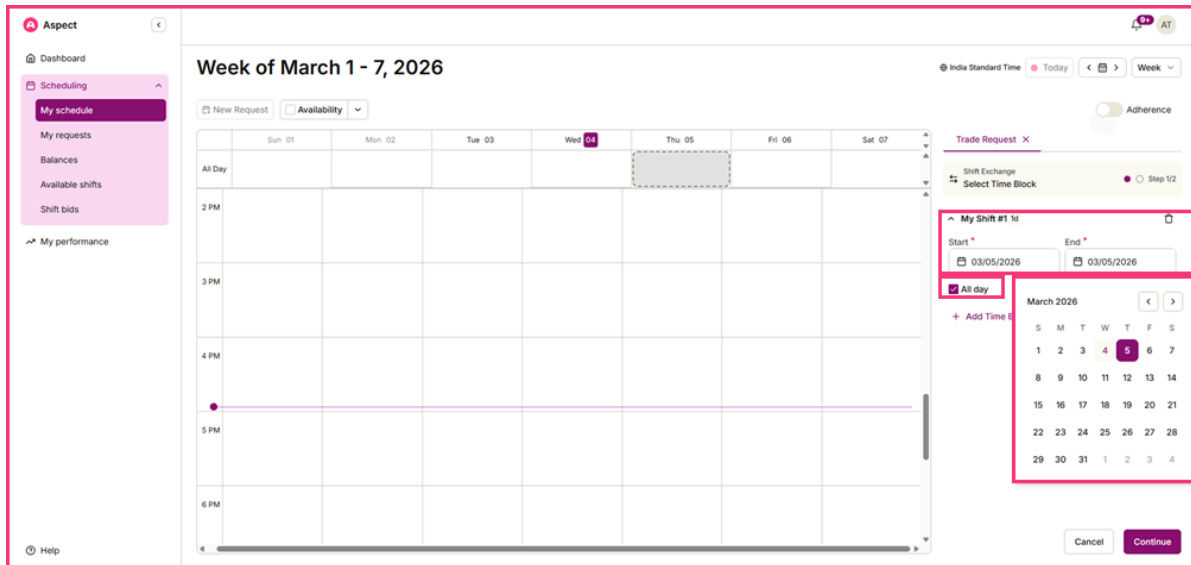


Figure 1-4

6. Click **Add Time Block** to add multiple shifts to the request. When you are done, click **Continue**.

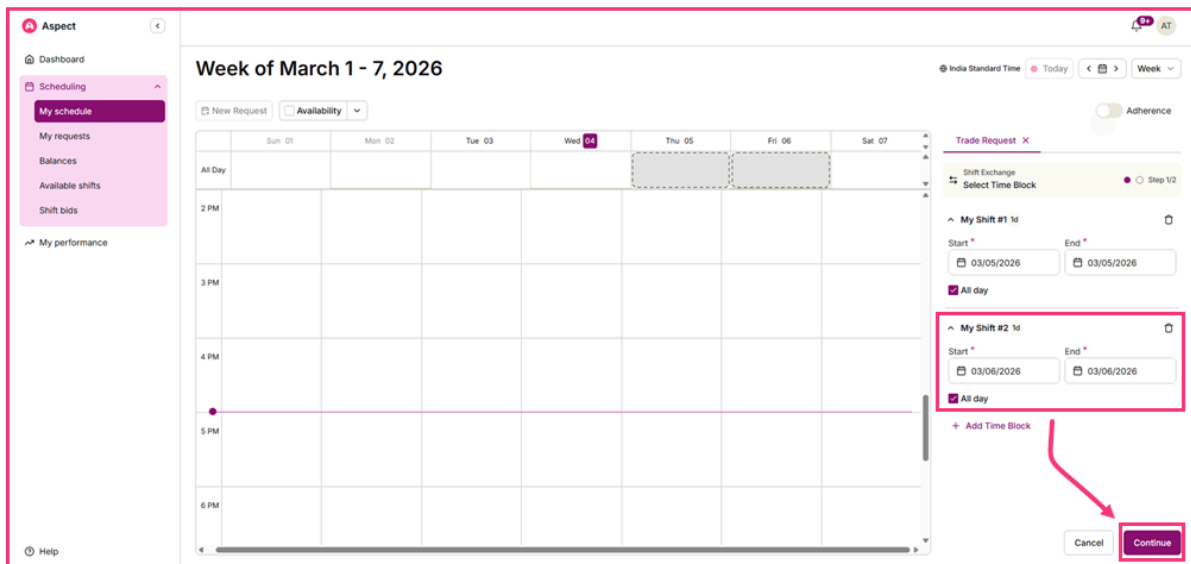


Figure 1-5

7. Click **With an Agent** to exchange your shift directly with a specific employee. Click Post to Trade board if you want to post your shift exchange to the Trade Board. In this example, we selected **With an Agent**.

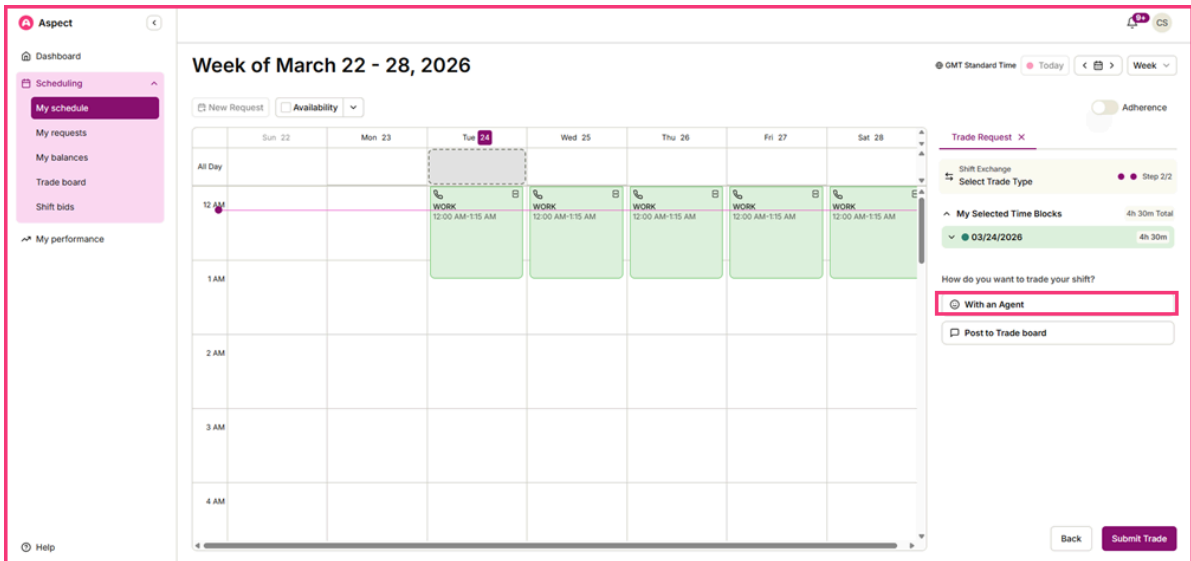


Figure 1-6

8. Type the email address or name of the employee you want to exchange the shift with and press **Enter**. Select the Employee and click **Continue**.

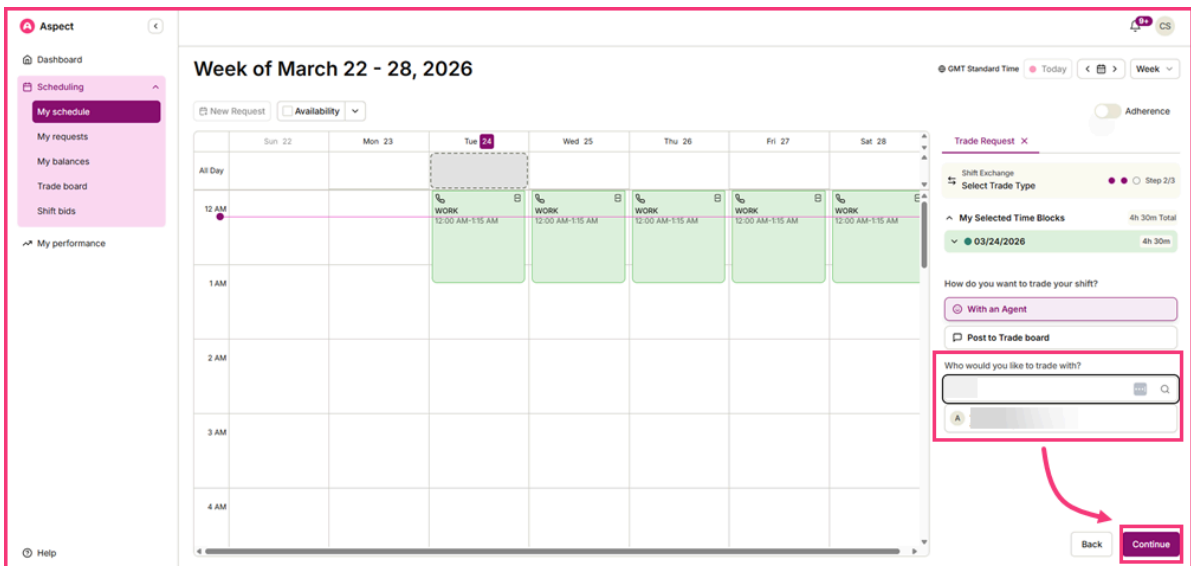


Figure 1-7

9. A preview of the selected employee's schedule is displayed.

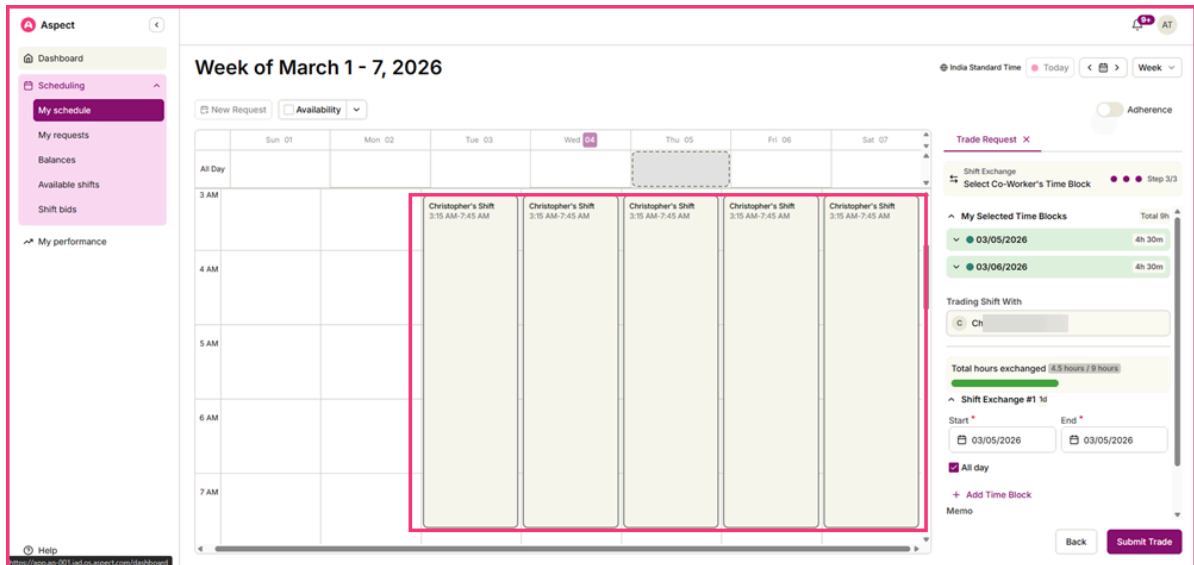


Figure 1-8

- The **Total hours exchanged** indicator shows the number of hours given and received in the exchange, alerting you if hours are exceeded.
- Optionally, add a note in the **Memo** field and click **Submit Trade**.

Trade Request X

Shift Exchange
Select Co-Worker's Time Block Step 3/3

03/06/2026 4h 30m

Trading Shift With
Ch

Total hours exchanged 4.5 hours / 9 hours

Shift Exchange #1 1d

Start * 03/05/2026 End * 03/05/2026

All day

+ Add Time Block

Memo
Add a memo to your trade request

Back Submit Trade

Figure 1-9

10. Your shift exchange request has been successfully submitted.

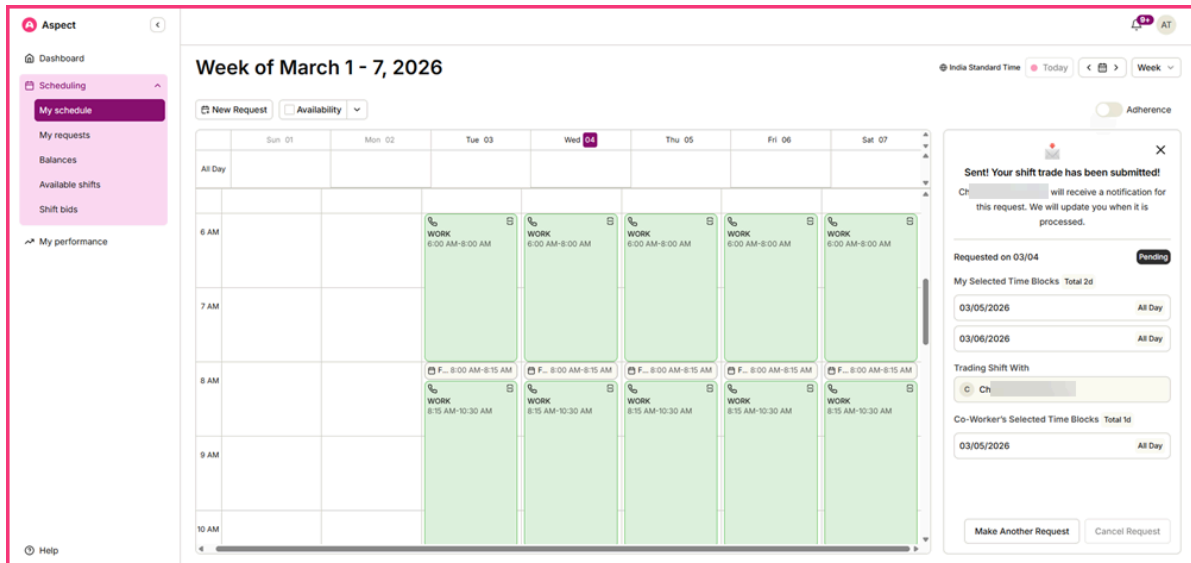


Figure 1-10

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▼ Employee: Cancel a Shift Trade or Exchange Request



The sender of a Shift Trade or Exchange request can only cancel if the request is in Open status. There are two ways the sender can cancel a Shift Trade request:

- From the Schedule view
- From the Notifications view

From the Schedule view

1. After you submit the Shift Trade request, a confirmation message will appear on the right side of the screen.
2. Once the request updates to the Open status, click **Cancel Request**.

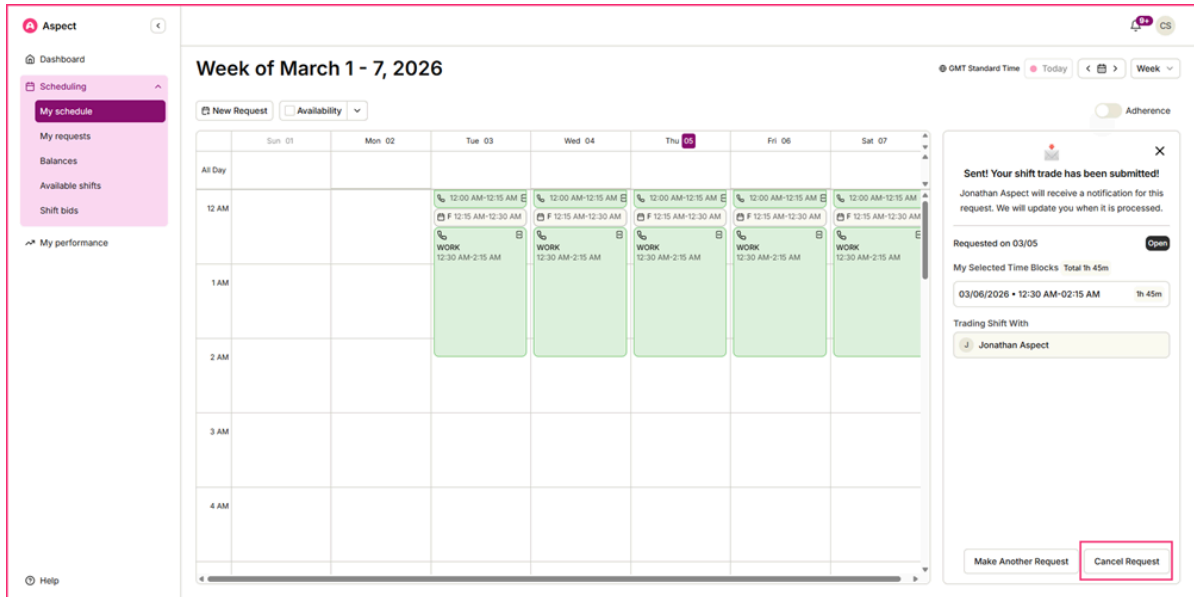


Figure 1-1

3. Click **Cancel Trade**.

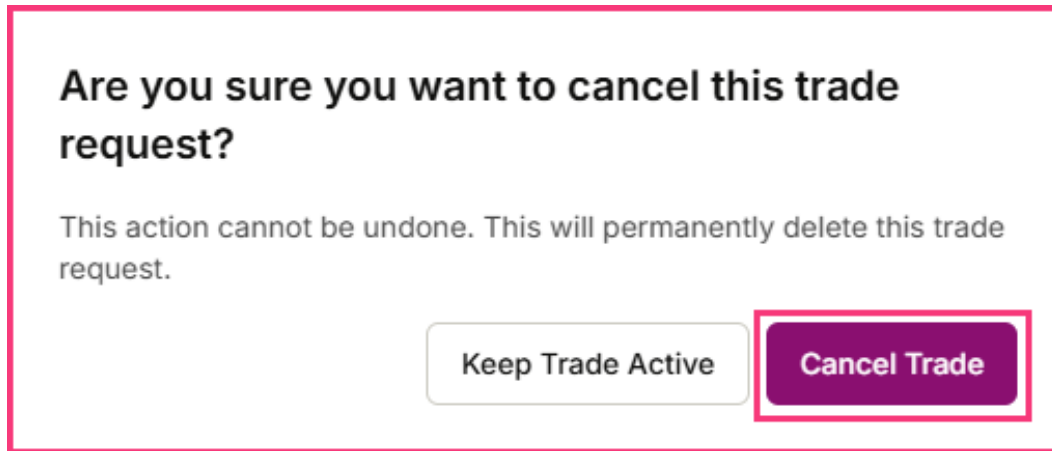


Figure 1-2

4. A notification will be sent to the sender and receiver indicating the Shift Trade request has been cancelled.

From the Notifications View

1. After you submit the Shift Trade request, you'll receive a notification message. Click to open it.
2. Confirm the Shift Trade request is in Open status and click **Cancel**.

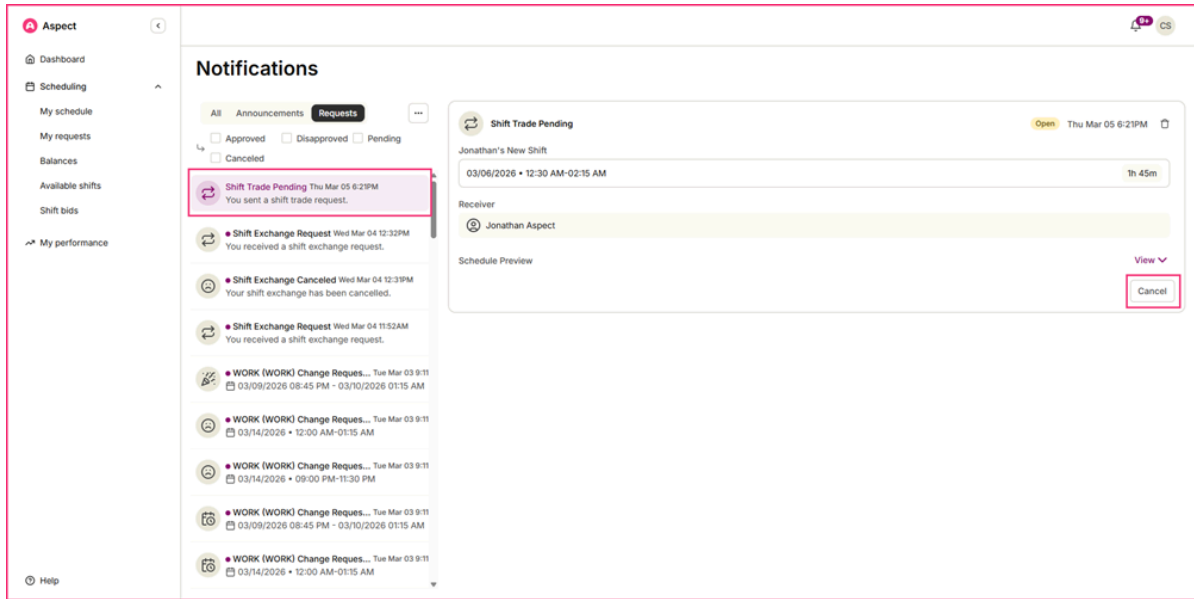


Figure 2-1

3. Click **Cancel Trade**.

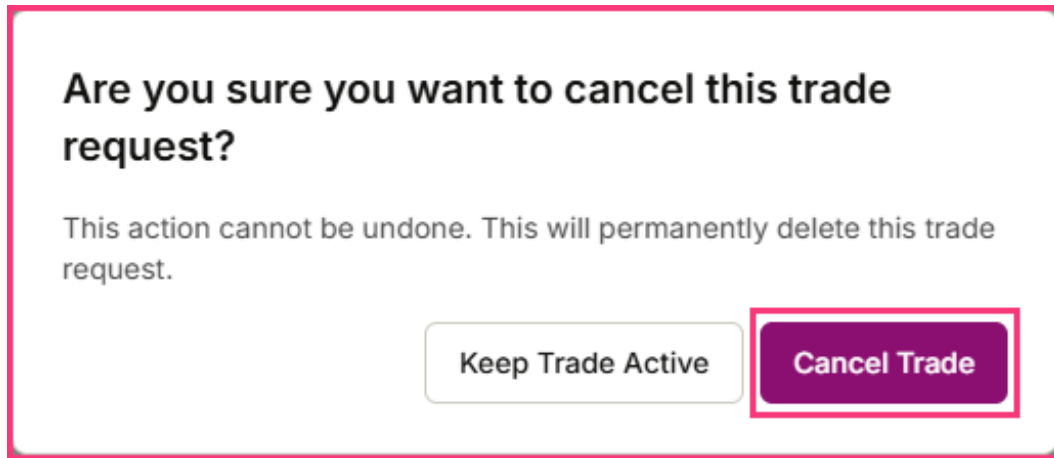


Figure 2-2

4. A notification will be sent to the sender and receiver indicating the Shift Trade request has been cancelled.

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▼ **Employee: View the My Balances table**



The My Balances table displays your used, current, and future personal time balances in an easy-to-navigate format. You can filter and sort transactions to track changes in your balances over time.

1. Open the New Experience and log in.
2. From the left-hand navigation menu, expand **Scheduling** and select **My balances**.

Date	Category	Amount Changed	New Account Balance
01/01/2026	Periodic Adjustment	0:00	+148:30
01/01/2026	Superstate	+1:30	+150:00
01/02/2026	Superstate	+1:30	+151:30
01/05/2026	Superstate	+1:30	+153:00
01/06/2026	Superstate	+1:30	+154:30
01/07/2026	Superstate	+1:30	+156:00
01/08/2026	Superstate	+1:30	+157:30
01/09/2026	Superstate	+1:30	+159:00
01/12/2026	Superstate	+1:30	+160:30
01/13/2026	Superstate	+1:30	+162:00

Figure 1-1

3. View the details of the table structure below:
 - **Date:** Date navigation lets you view balances and transactions for specific time periods by selecting different dates.
 - **Category:** Displays the type of transaction.
 - **Amount Changed:** The number of hours added or subtracted.
 - **New Account Balance:** Displays the updated total balance after the transaction.
 - **Total Remaining Balance as of:** Displays your current balances with a timestamp (for example, "as of 06/12/25: +40:00").

My balances

AUTO_PA

Total Remaining Balance as of 03/24/2026: -238.00

Date	Category	Amount Changed	New Account Balance
01/01/2026	Periodic Adjustment	0.00	+148.30
01/01/2026	Superstate	+130	+150.00
01/02/2026	Superstate	+130	+151.30
01/05/2026	Superstate	+130	+153.00
01/06/2026	Superstate	+130	+154.30
01/07/2026	Superstate	+130	+156.00
01/08/2026	Superstate	+130	+157.30
01/09/2026	Superstate	+130	+159.00
01/12/2026	Superstate	+130	+160.30
01/13/2026	Superstate	+130	+162.00

Showing 10 of 262 results

Figure 1-2

- To select a different balance category, click the dropdown menu and choose your preferred option.

My balances

AUTO_PA

Total Remaining Balance as of 03/24/2026: -238.00

- AUTO_PA
- Benchmark
- E0001
- HRIS POC Account
- HRIS POC Account SICK
- PTO
- Unplanned PTO
- WFX_AK_PTO_Personal

Date	Category	Amount Changed	New Account Balance
01/01/2026	Periodic Adjustment	0.00	+148.30
01/01/2026	Superstate	+130	+150.00
01/02/2026	Superstate	+130	+151.30
01/05/2026	Superstate	+130	+153.00
01/06/2026	Superstate	+130	+154.30
01/07/2026	Superstate	+130	+156.00
01/08/2026	Superstate	+130	+157.30
01/09/2026	Superstate	+130	+159.00
01/12/2026	Superstate	+130	+160.30
01/13/2026	Superstate	+130	+162.00

Showing 10 of 262 results

Figure 1-3

- To apply a filter to the Balances table, click **Filter** and select **Date** or **Category**.

My balances

AUTO_PA Total Remaining Balance as of 03/24/2026: -238.00

Filter

Date	Category	Amount Changed	New Account Balance
	Periodic Adjustment	0.00	+148.30
01/01/2026	Superstate	+130.00	+150.00
01/02/2026	Superstate	+130.00	+151.30
01/05/2026	Superstate	+130.00	+153.00
01/06/2026	Superstate	+130.00	+154.30
01/07/2026	Superstate	+130.00	+156.00
01/08/2026	Superstate	+130.00	+157.30
01/09/2026	Superstate	+130.00	+159.00
01/12/2026	Superstate	+130.00	+160.30
01/13/2026	Superstate	+130.00	+162.00

Showing 10 of 262 results

Figure 1-4

Apply a Date Filter:

- a. When applying a **Date** filter, select **is between** to filter for a date range, or select **equal to (=)** if you want to filter for a specific date. Select **exclude (!=)** if you want to exclude certain dates.

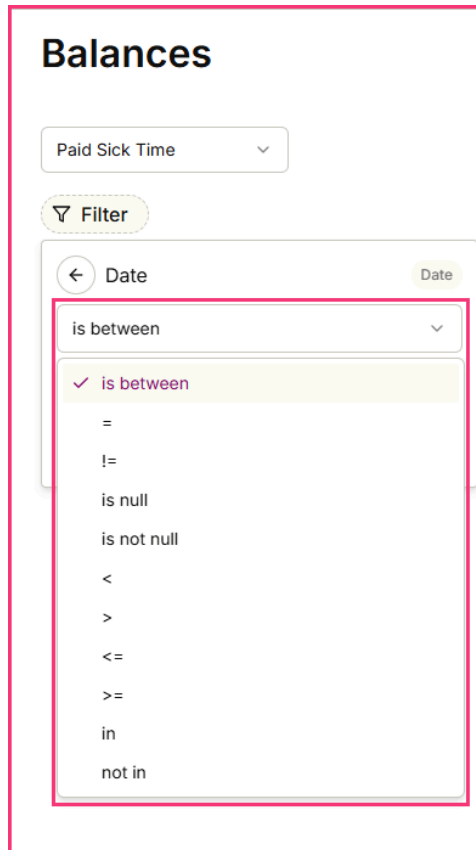


Figure 1-5

b. Then select your **start** and **end** dates using the date selectors and click **Apply**.

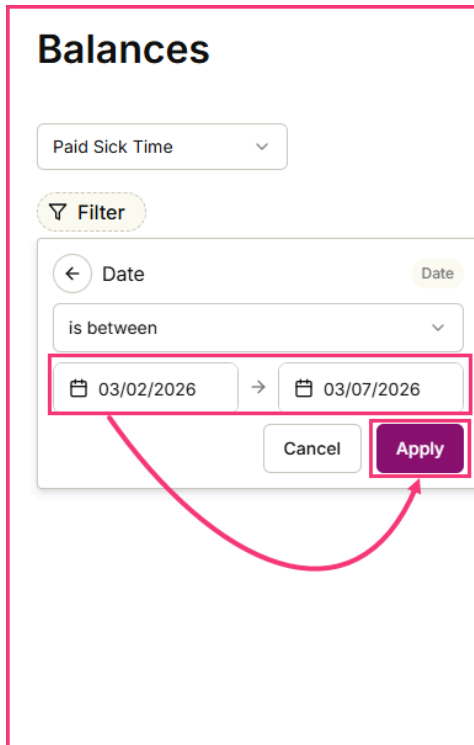


Figure 1-6

c. The table will automatically update with your applied filter choices.

My balances

AUTO_PA ▾

Date is between 03/16/2026 - 03/20/2026 ✕

Filter

Date	Category	Amount Changed	New Account Balance
03/16/2026	Superstate	+130	+228.00
03/17/2026	Superstate	+130	+230.30
03/18/2026	Superstate	+130	+232.00
03/19/2026	Superstate	+130	+233.30
03/20/2026	Superstate	+130	+235.00

Showing 10 of 5 results

Total Remaining Balance as of 03/24/2026: +238.00

Figure 1-7

Apply a Category Filter:

- a. When applying a **Category** filter, select **contains**, then enter the name of the **Category** and click **Apply**. When selecting **equal to (=)**, the category entered must be an exact match. Select **exclude (!=)** if you want to exclude certain Categories.

The screenshot shows a mobile application interface for 'Balances'. At the top, there is a dropdown menu for 'Yearly Paid Work Hours'. Below it is a 'Filter' button. A modal window is open for the 'Category' field, showing a dropdown menu with 'contains' selected. The text 'Super' is entered in the input field. There are 'Cancel' and 'Apply' buttons at the bottom of the modal. Below the modal, a table of dates is visible, including 01/06/2026, 01/07/2026, 01/08/2026, 01/09/2026, 01/12/2026, and 01/13/2026. At the bottom, it says 'Showing 10 of 262 results'.

Figure 1-8

- b. The table will automatically update with your applied filter choices.

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▼ **Employee: View the My Requests table**



The My Requests table helps employees track their schedule change requests outside of the notification center. It provides a comprehensive view of request status, waitlist position for pending requests, detailed denial reasons, and the ability to revise and resubmit requests.

1. Open the New Experience and log in.
2. From the left-hand navigation menu, expand **Scheduling** and click **My Requests**.

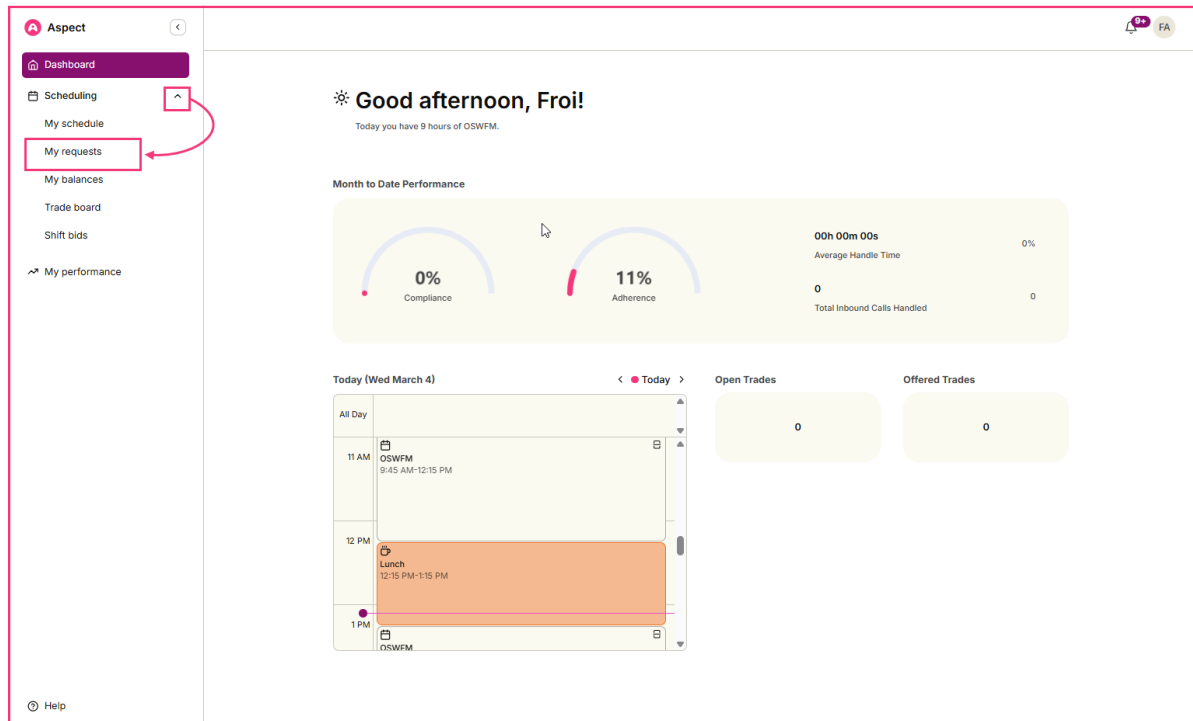


Figure 1-1

3. The My Requests table displays the following information for all of your current requests:
 - Activity type
 - Date the request was submitted
 - Date and time for the schedule change request

- Comments
- Status (if a request is disapproved, detailed reasons are included)
- Scorecard (shows which specific rules affected the approval or denial of your request)

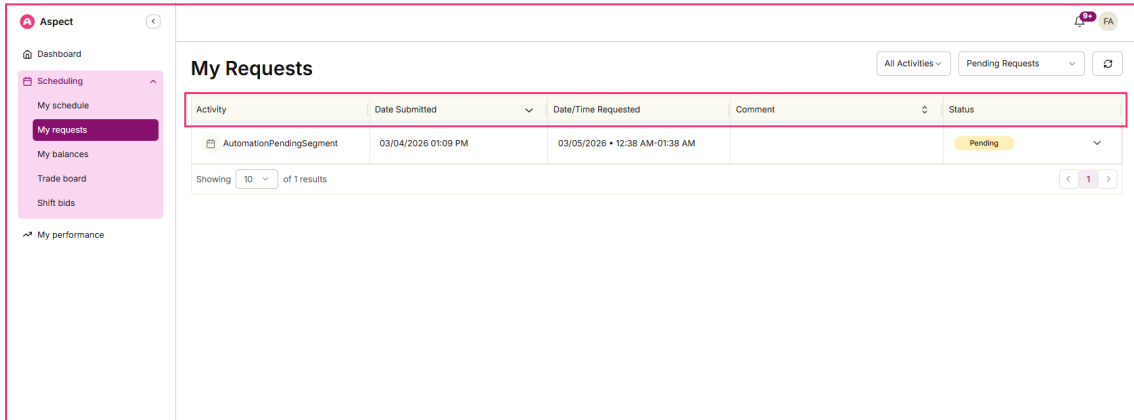


Figure 1-2

4. Click the drop-down menu next to **All Activities** or **All Requests** to select a specific Activity or Request type and filter the table results.

- All Activities

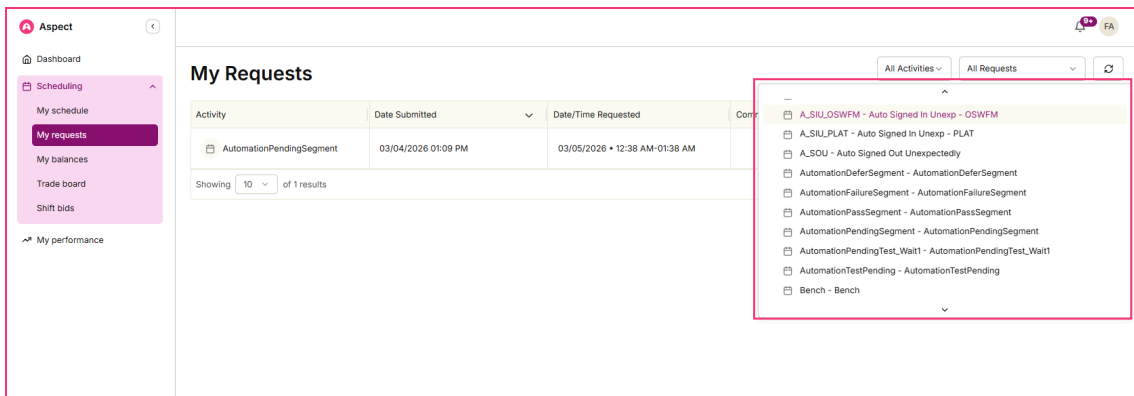


Figure 1-3

- All Requests

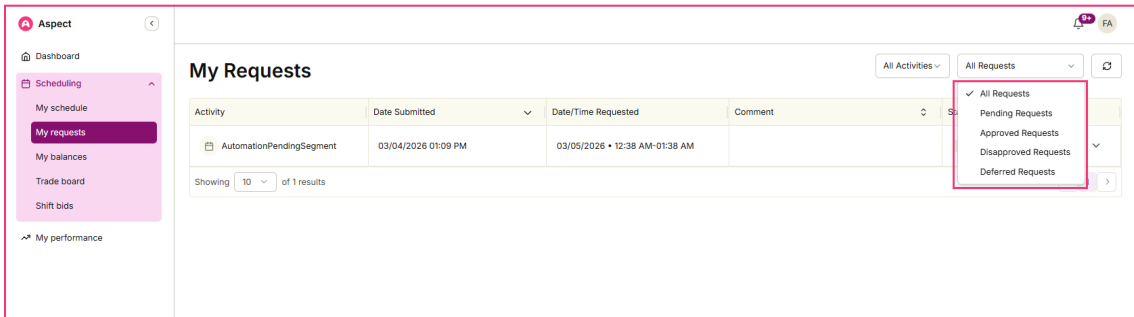


Figure 1-4

- Click the expand arrow to see more details about a specific request. If the request is still in **Pending** status, you can edit or cancel the request.

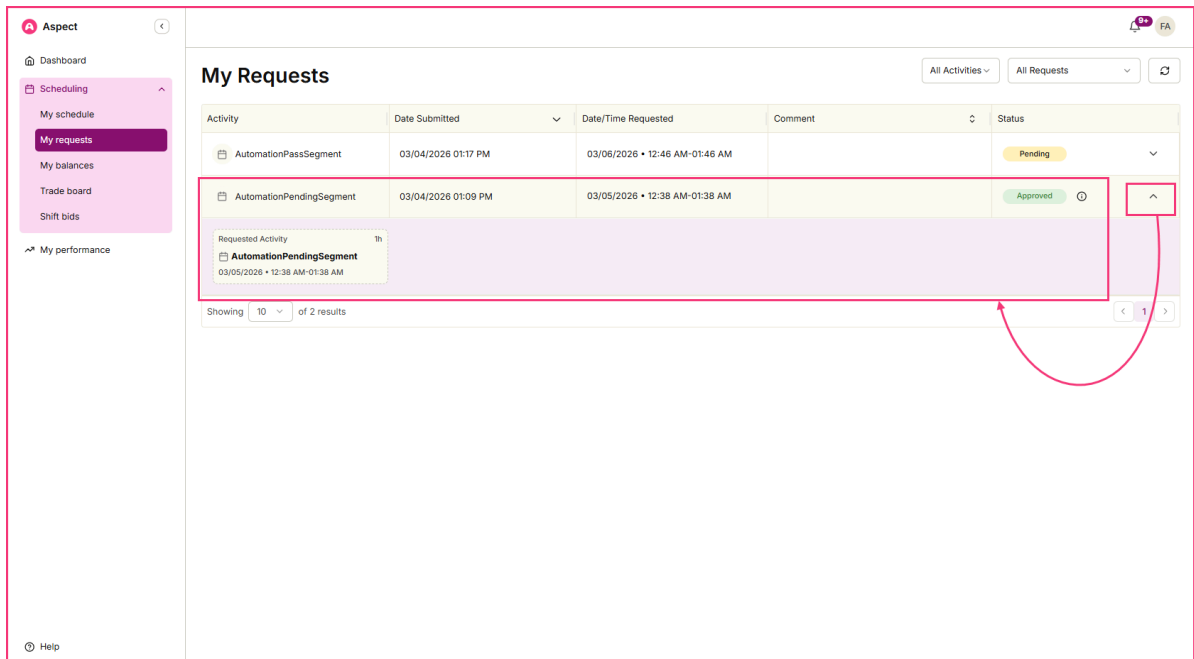


Figure 1-5

- Click the **Scorecard** icon to see which specific rules affected the approval or denial of your request.

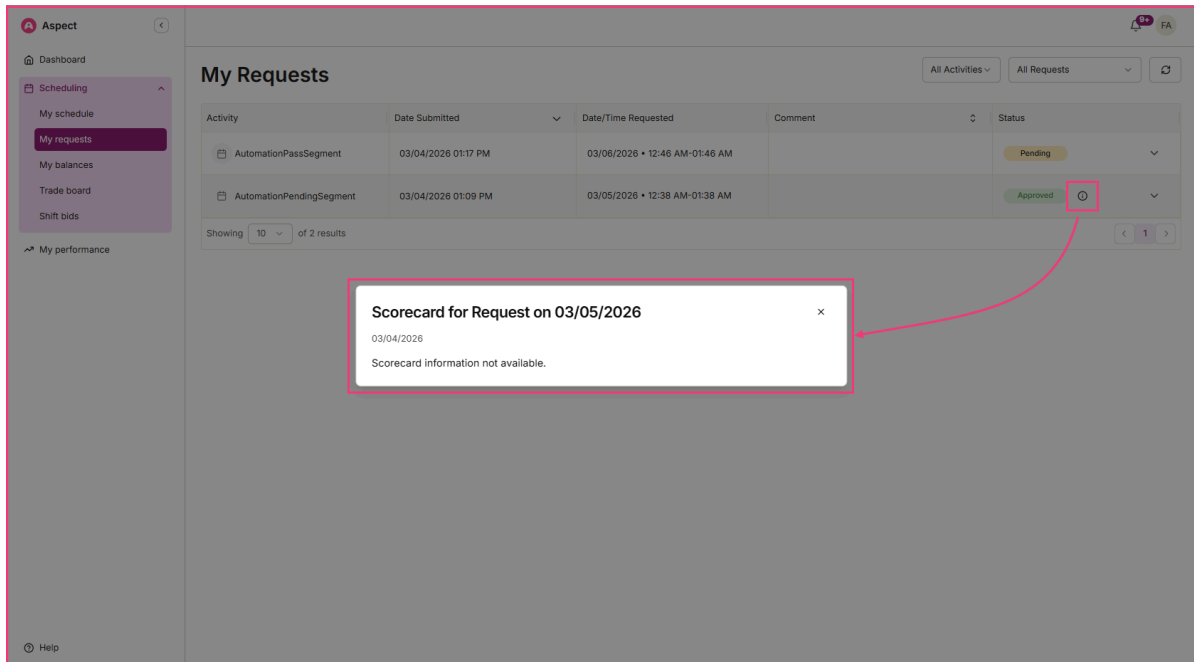


Figure 1-6

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▼ Employee: View Historical Schedule Adherence

Overview

The **Historical Schedule Adherence** feature tracks how closely an employee's actual operations follow their planned schedule. With this feature, employees can view their Adherence in:

- **Day View** - Displays more detailed information. Hovering the cursor over the adherence allows the employee to view additional details as well.
- **Week View** - The default view that shows Adherence for the week.
- **Month View** - Displays the percentage of time the employee maintained schedule adherence for the month.



Adherence mode remains active only while you stay on the schedule page. If you refresh the page or navigate to another section, Adherence will automatically turn off.

Enable Historical Schedule Adherence view

1. Open the New Experience and log in.
2. From the left-hand navigation menu, expand **Scheduling** and click **My Schedule**.

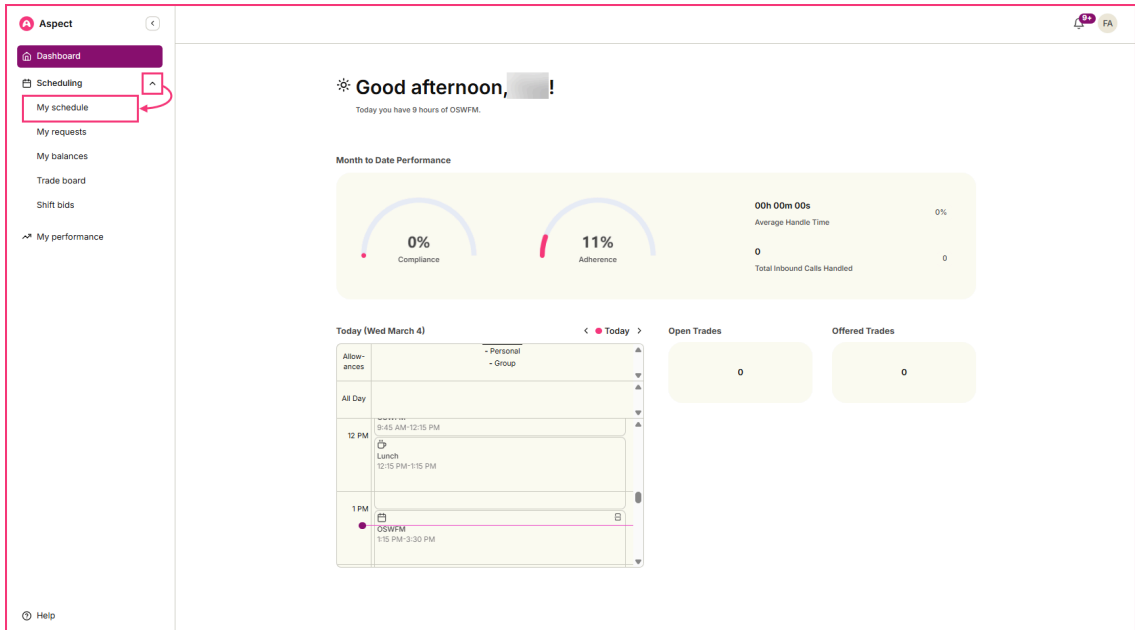


Figure 1-1

3. Click the **toggle switch** to the right to enable the **Adherence view**. This will display your **Schedule Adherence** in the **Week of...** view.



When **Adherence** is enabled, the following options are disabled in the Navigation Menu.

- **Edit my Schedule**
- **Request PTO**
- **Schedule Preference**

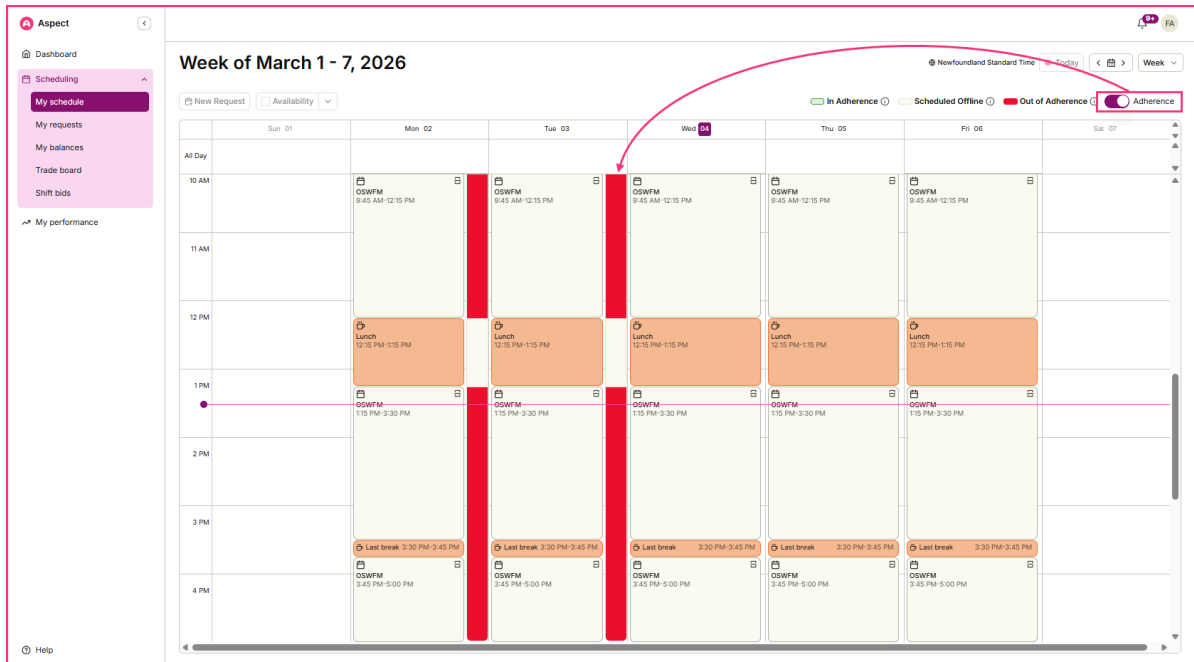


Figure 1-2

- If you enable Adherence while editing your schedule, you will lose any unsaved changes. To preserve your edits, click the **Cancel** button when prompted.

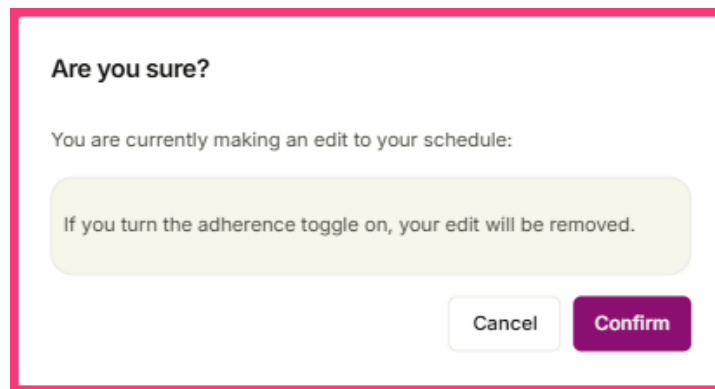


Figure 1-3

4. To view more information about Adherence, hover over the **Information icon** next to the Adherence type to see the **Adherence Legends**.

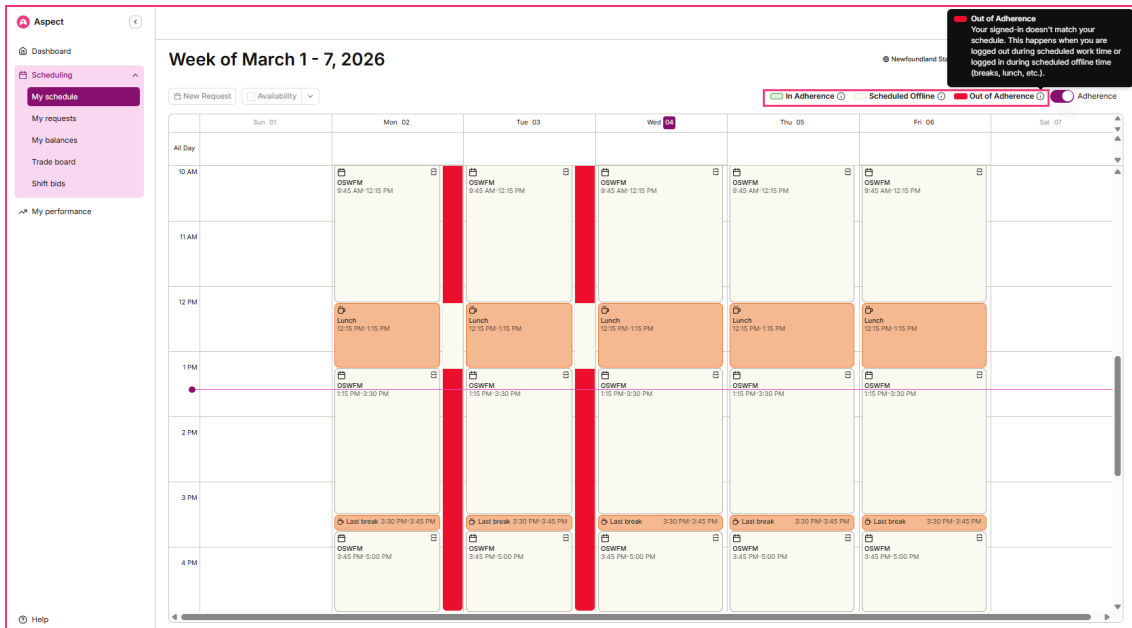


Figure 1-4

- The Adherence Legends include the following:
 - **In Adherence** - indicates the employee is logged in and actively working during their scheduled work hours.
 - **Scheduled Offline** - indicates the employee's planned offline period such as breaks and lunch.
 - **Out of Adherence** - indicates the employee is unavailable during their scheduled work hours.
5. The Adherence view displays the following indicators that are visible in week and month views.
- The **Status Indicator** provides your workload status.

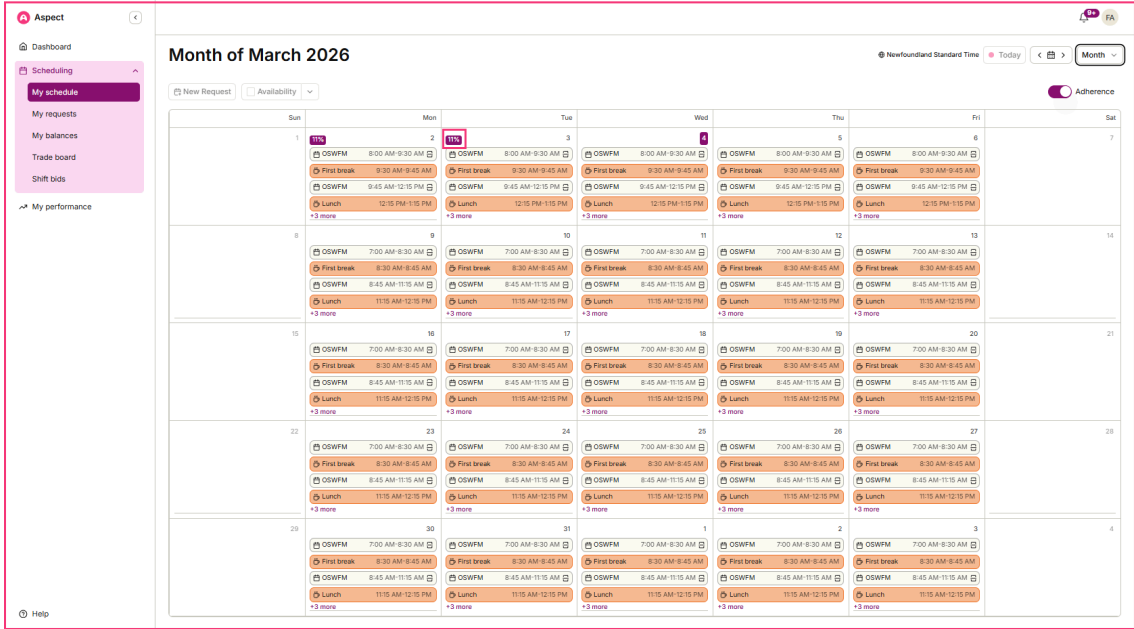


Figure 1-5

- The **Schedule Adherence** percentage shows when you click the **+*** more icon.

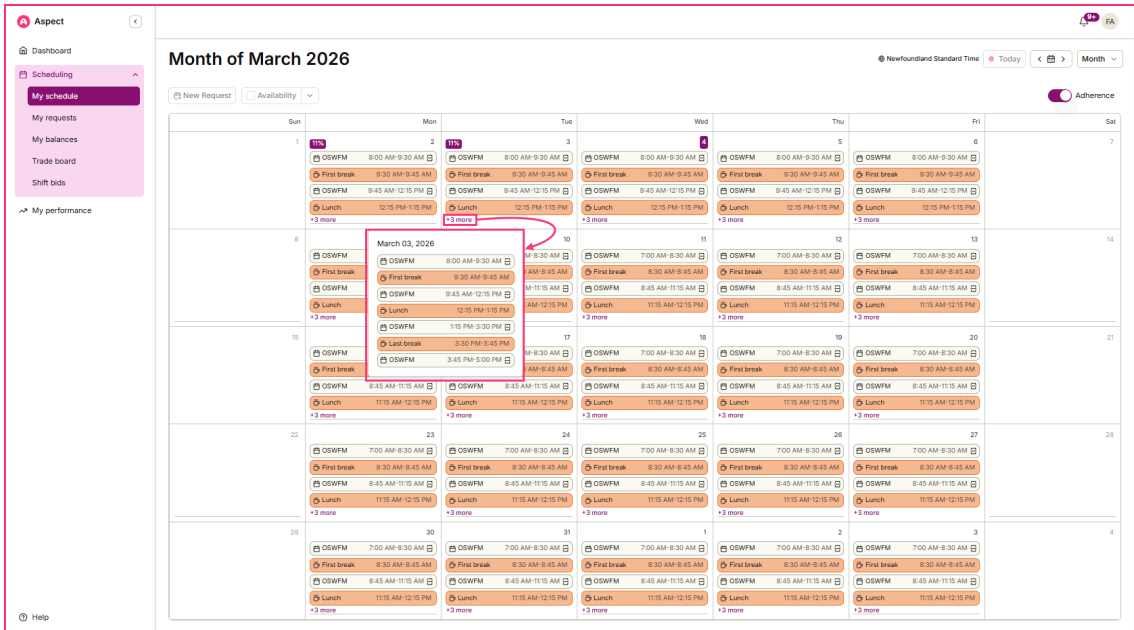


Figure 1-6

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▼ **Employee: Submit a Shift Bid**



Shift Bidding offers employees an intuitive and visually appealing interface for managing their shift bids. Employees can view, rank, and manage bids with easy-to-use tools.

The system features filtering options, drag-and-drop functionality, and preference settings that enable employees to rank shifts efficiently based on their personal needs.

1. Employees can access Shift Bids in two ways:

- From the left-hand navigation menu, expand **Scheduling** and click **Shift bids**.

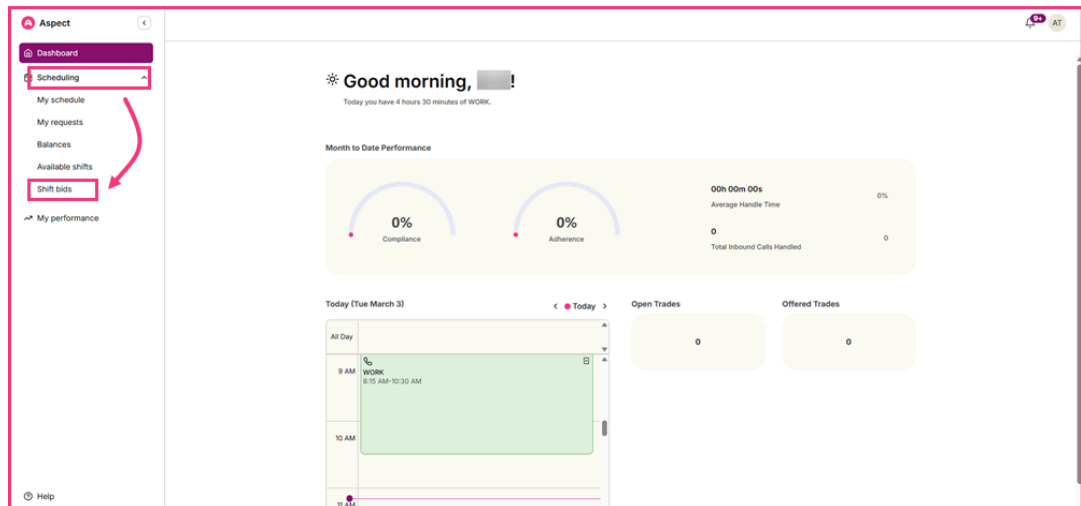


Figure 1-1

- From the upper-right corner, click the **Notifications** icon and select a **Shift Bid notification** to view the details.

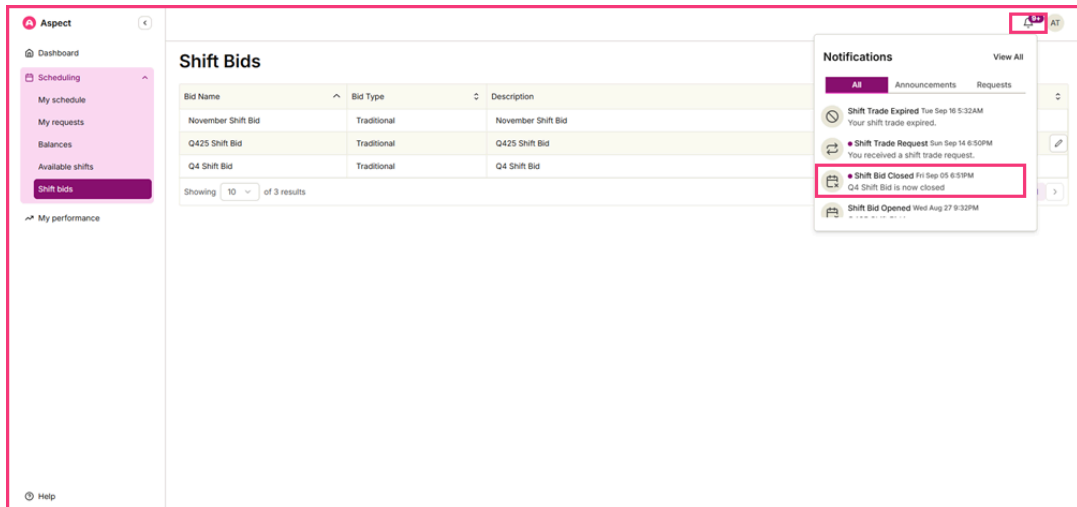


Figure 1-2

2. Open the Shift Bid **Notification** and click **Start Shift Bid**.

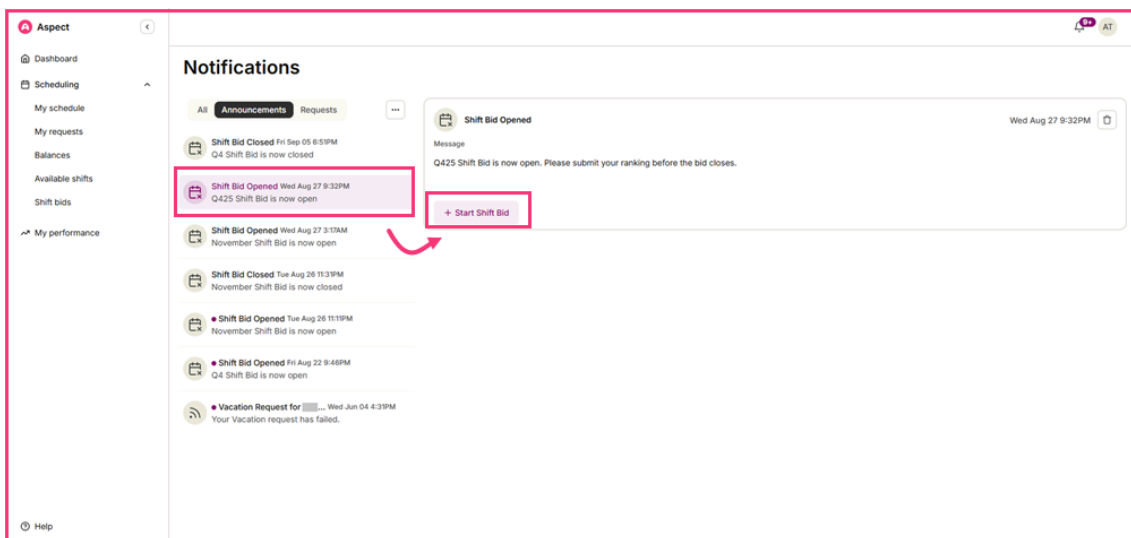


Figure 1-3

3. You will see all **Shift Bids** assigned to you. Click the **pencil** icon to the right of a Shift Bid to view and rank available shifts.

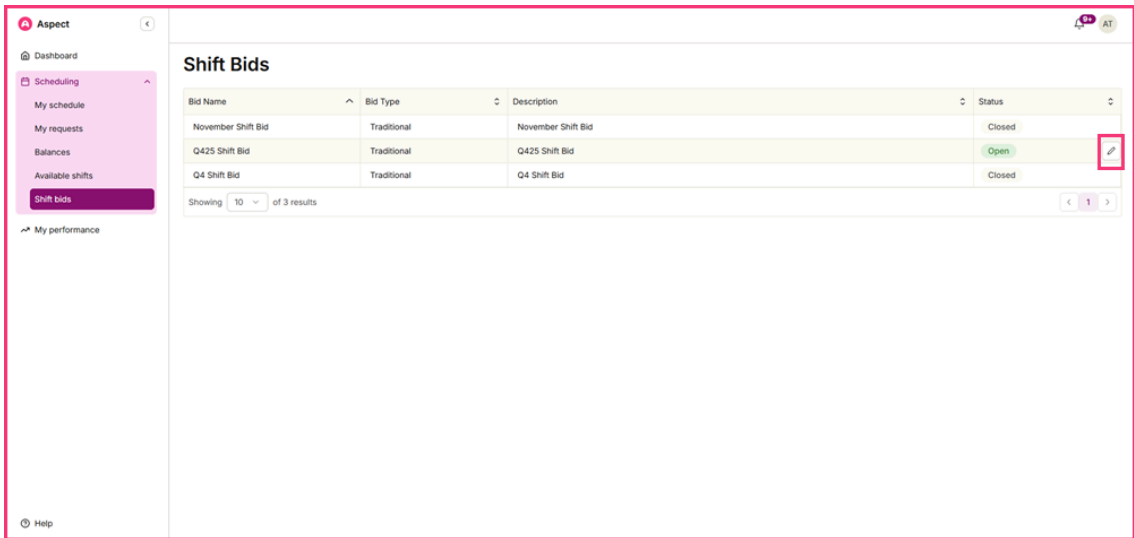


Figure 1-4

4. Click the **arrow** next to an available shift to expand the shift details.

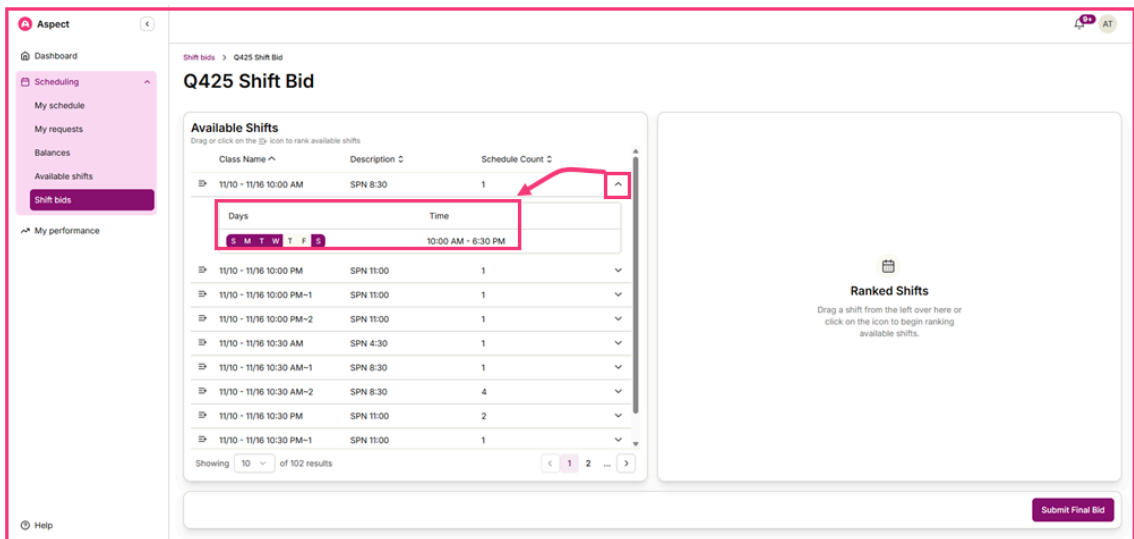


Figure 1-5



Working days appear in black and display the corresponding shift times.

5. **Available Shifts** can be moved to the **Ranked Shifts** panel by dragging and dropping or by clicking the **add** icon on the left.

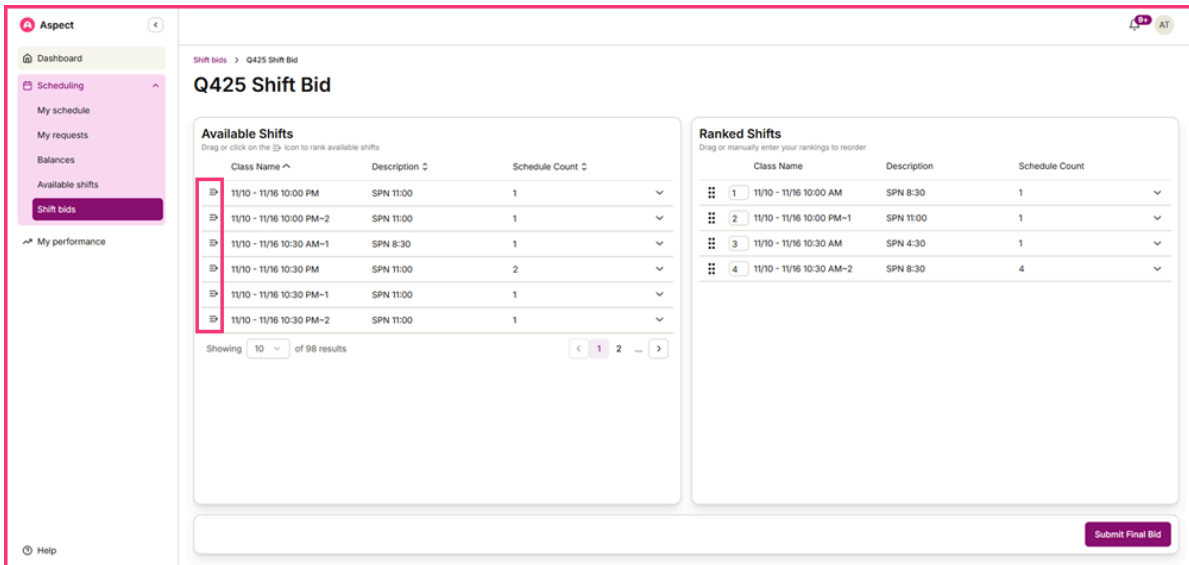


Figure 1-6

- You can reorder your Ranked Shifts by either dragging them up or down, or by entering a specific rank number in the box beside each shift. When you've finalized your preferences, click **Submit Final Bid**.



All shifts must be ranked before you can submit your final bid.

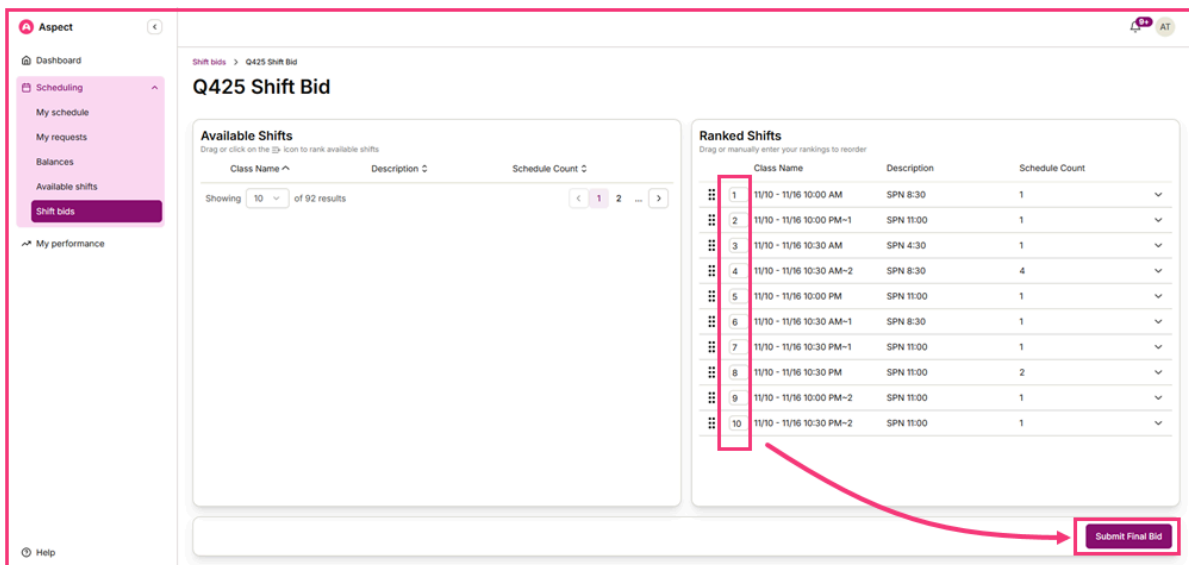
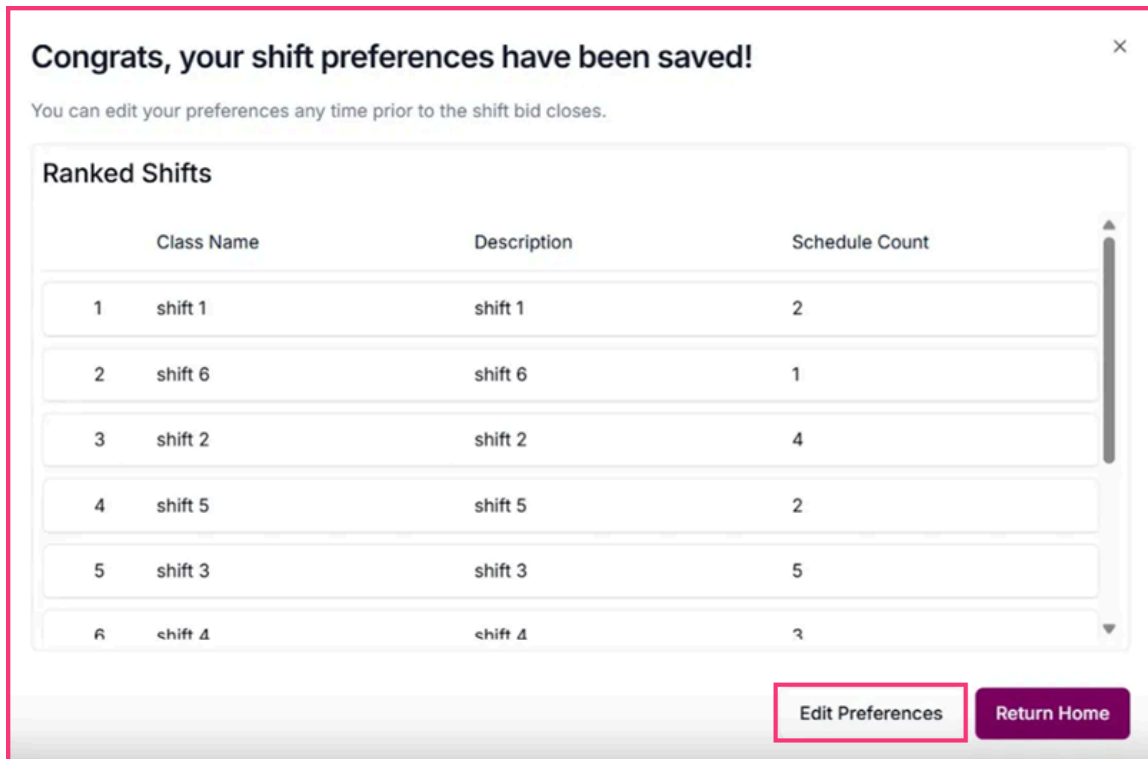


Figure 1-7

7. Click **Edit Preferences** to edit your rankings after submission.



The screenshot shows a confirmation message with the title "Congrats, your shift preferences have been saved!". Below the title is a sub-header "Ranked Shifts" and a table with three columns: "Class Name", "Description", and "Schedule Count". The table contains six rows of shift data. At the bottom right of the message are two buttons: "Edit Preferences" and "Return Home".

	Class Name	Description	Schedule Count
1	shift 1	shift 1	2
2	shift 6	shift 6	1
3	shift 2	shift 2	4
4	shift 5	shift 5	2
5	shift 3	shift 3	5
6	shift 4	shift 4	3

Figure 1-8

8. The admin will set the due date for Shift Bid submissions. You will receive a notification once your Shift Bid has been processed.

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▼ **Employee: View the Performance Hub**



The Performance Hub displays a user's historical performance data gathered from WFM. It allows users to view their performance through graphical representations.

1. [Open the New Experience and log in.](#)
2. In the left panel, click **My Performance**, or click any KPI in the **Performance widget**.

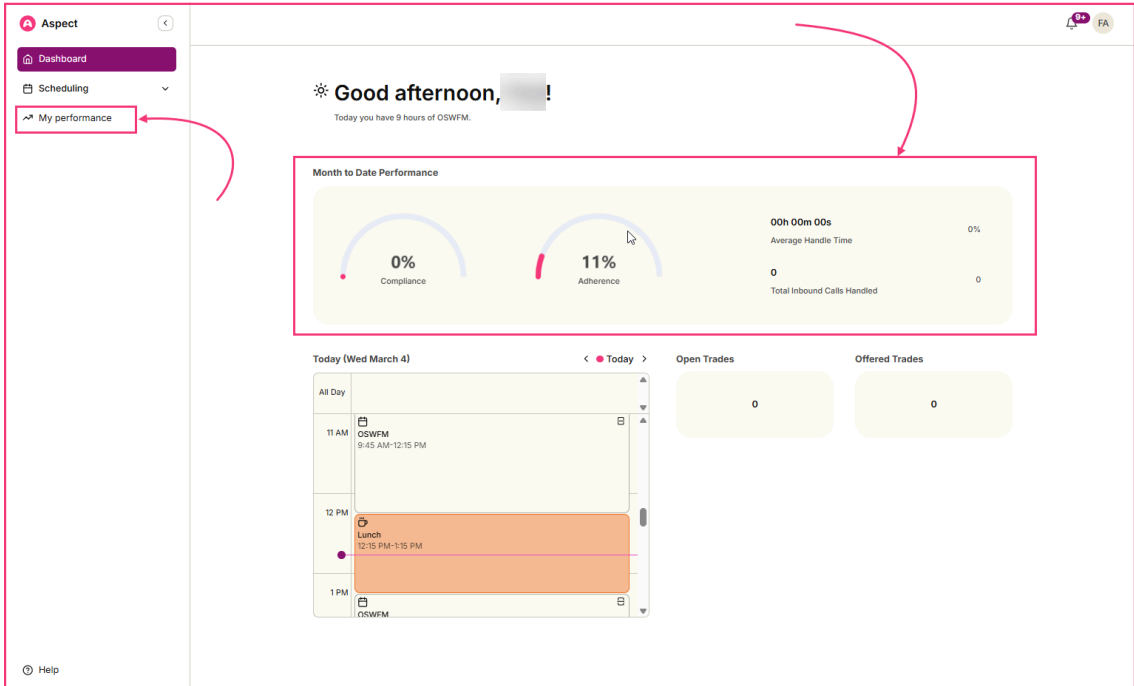


Figure 1-1

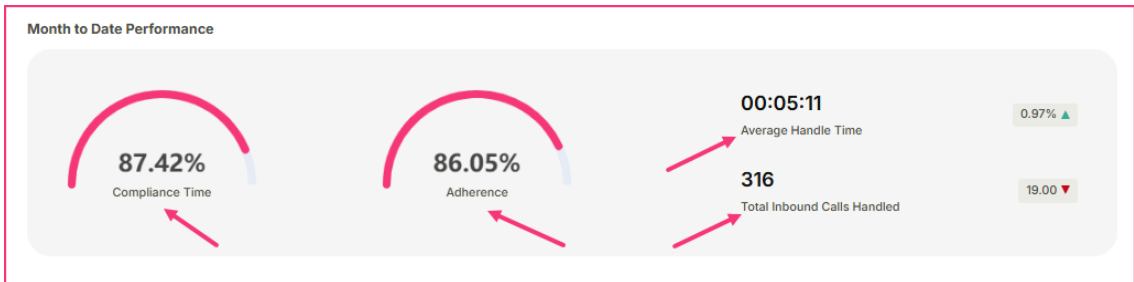


Figure 1-2

- From the Performance Dashboard, click the drop-down menu below the Performance Hub header and select the type of performance you want to view. All KPI options in the drop-down list are standard defaults.



Figure 1-3

The Performance Hub KPI options are described below.

- **Adherence Percentage** - Shows your adherence percentage value. It's calculated as $\frac{\text{In-Adherence Time}}{\text{Schedule Time}} \times 100$.
- **After Call Work** - Provides a performance summary for after-call work.
- **Average Handle Time** - Measures the average handle time per inbound contact.
- **Average Talk Time** - It's calculated as $\frac{\text{AHT} - \text{ACW}}{\text{AHT} - \text{ACW}}$.
- **Compliance Percentage** - Shows the percentage of agents who were in compliance. Its calculated as $\frac{\text{Compliance}}{\text{Scheduled}} \times 100$ *
- **Inbound Calls** - The number of inbound contacts handled.
- **Outbound Calls** - The number of outbound contacts handled.
- **Plugged In Percentage** - Shows the percentage of time you were logged in and available. Its computed as $\frac{\text{Plugged In}}{\text{Signed In}} \times 100$ *
- **Total Calls** - Shows the total calls answered during the day. Its computed as $\text{NCH} + \text{NOC}$.

4. Click the date field and use the date picker to choose a date range or a specific day.

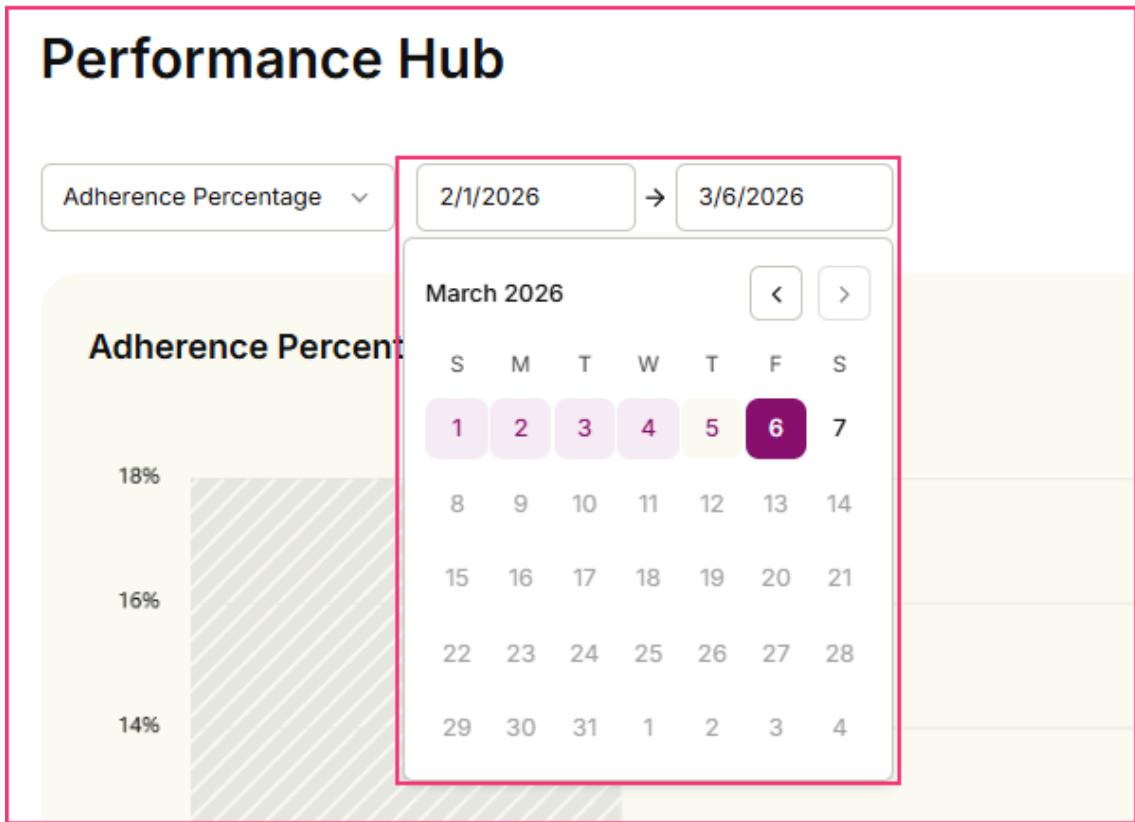


Figure 1-4

5. Once you're done, the Performance Hub displays a summary of the agent's performance for the selected time period. Hover over the graph to view detailed information. Note that details vary depending on the KPI you selected.



Figure 1-5

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▼ Employee: View the Trade Board for Shift Trades or Exchanges

- [Trade Board Overview](#)
- [Post a Shift Trade or Exchange Request to the Trade Board](#)
- [Accept a Shift Trade or Exchange from the Trade Board](#)

Trade Board Overview



The Trade board allows employees to post, search for, and accept shifts trades (giveaway) or exchanges based on their availability and skills. It facilitates communication between employees, allowing them to make more informed scheduling decisions.

Depending on your organization's activity handling rules in Aspect Workforce, all-day activities (such as Vacation) may not be tradeable even though they appear in the preview.

1. Expand **Scheduling and** click **Trade board**. You can also access the Trade board by selecting **View Trade on Board** after creating a shift trade/exchange with the **Post to Trade Board** option.

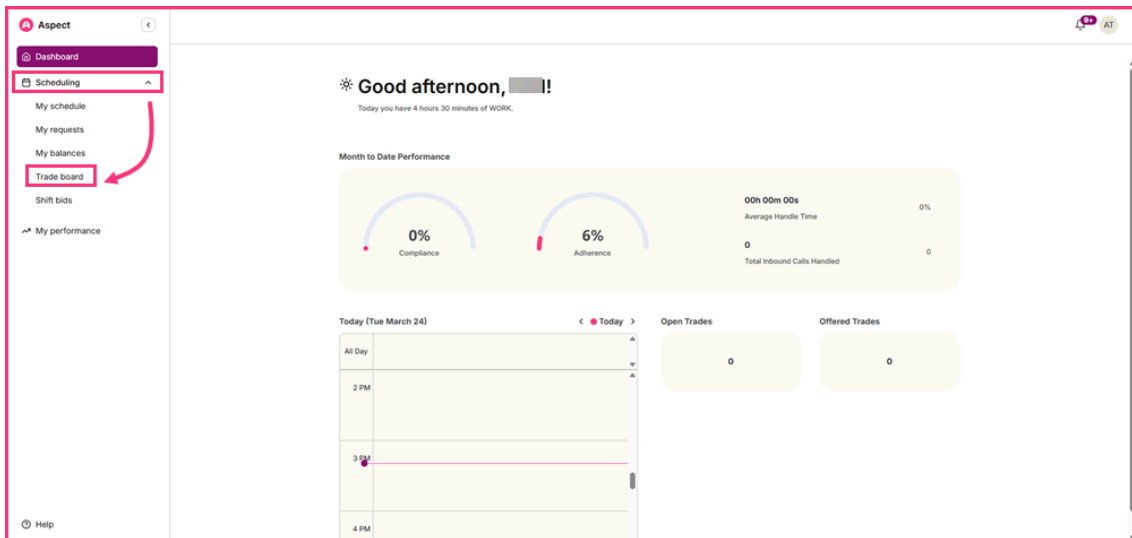


Figure 1-1

2. The Trade board displays a list of shift trade/exchange offers. The dropdown menus at the top offer the following filter options:
 - **Skill** - Filter for specific skills or all skills.
 - **Employee** - Filter for a specific employee or all employees.
 - **Status** - Filter for the status of the request.

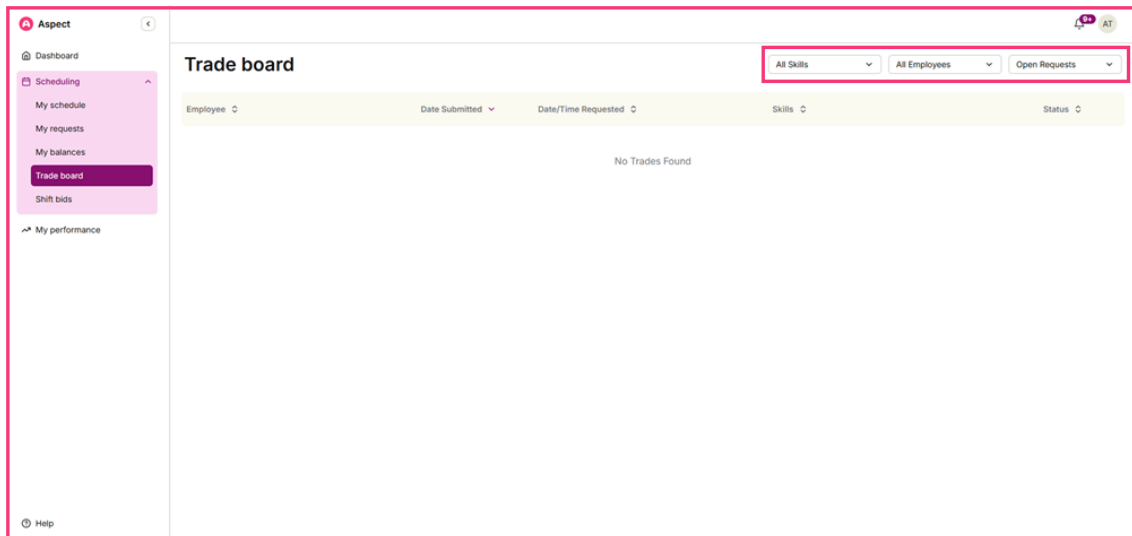


Figure 1-2

3. Click the **up/down arrows** to the right of each column to use the following sorting options:

- Employee who posted the shift.
- The date when the post was submitted.
- The date and time of the trade, which can include multiple dates and times.
- The skill required.
- The status of the shift.

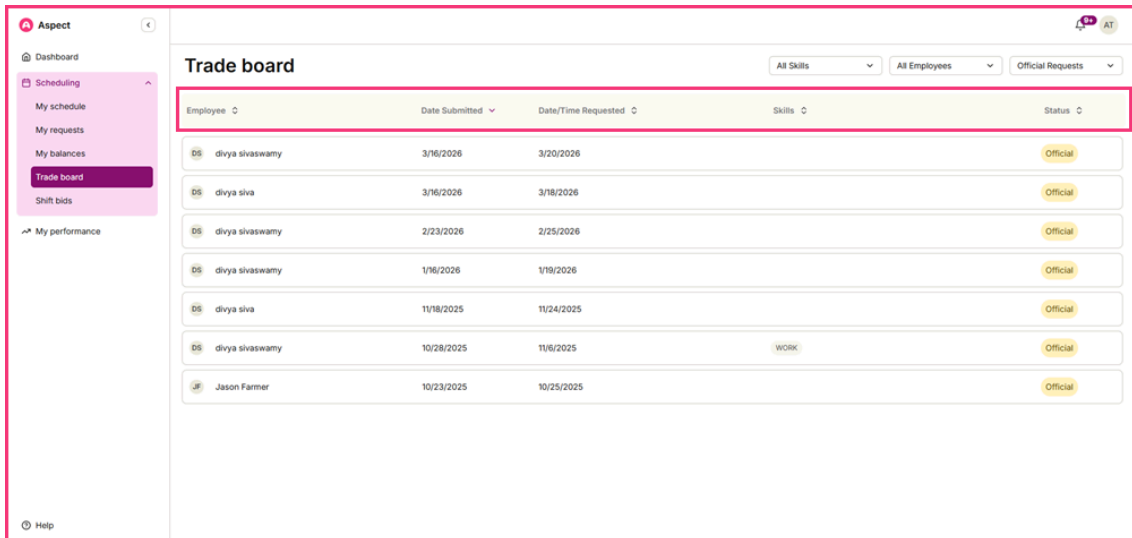


Figure 1-3

4. Click on a post to view additional information.

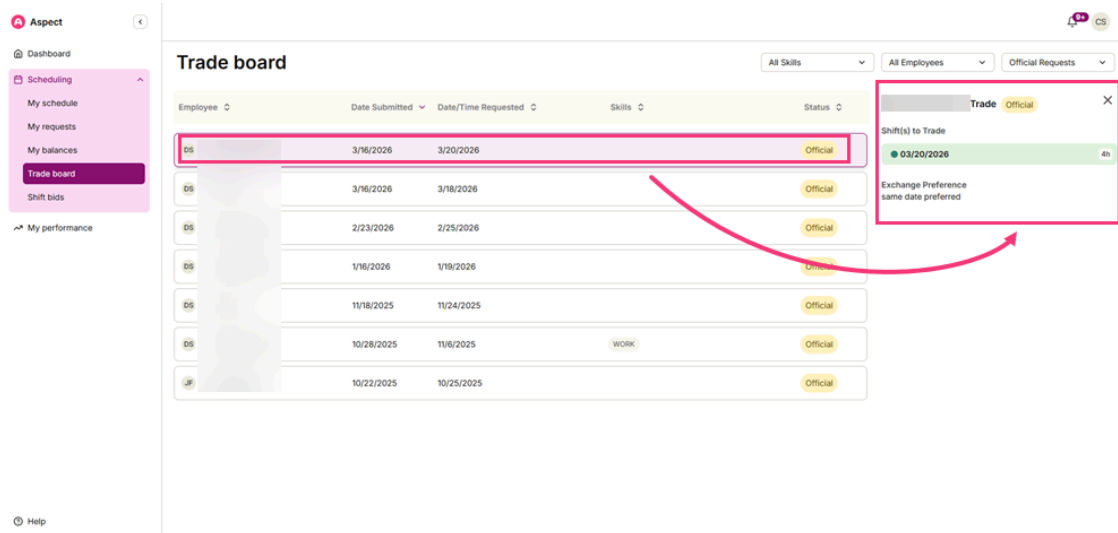


Figure 1-4

5. See how to post a shift trade/exchange request to the Trade board, or how to accept a shift trade/exchange from the Trade board.

Post a Shift Trade or Exchange Request to the Trade Board

1. Create a shift trade (giveaway) or shift exchange request and under **How do you want to trade your shift**, select **Post to Trade board**.

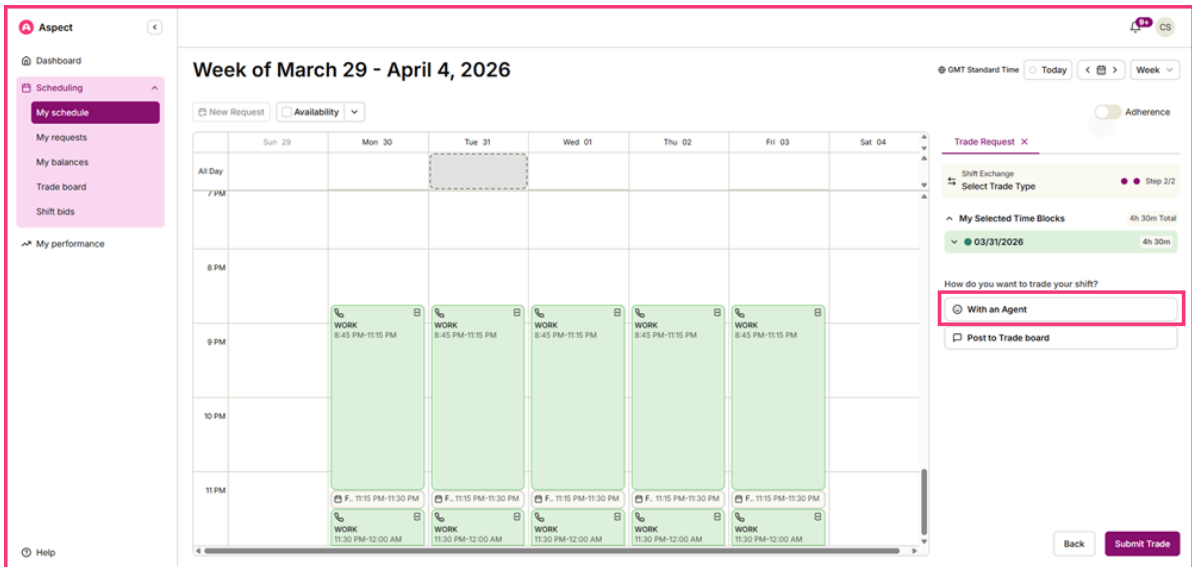



Figure 2-1

2. Optionally, select the check box next to **Add preference for shift offers**, add comments in the **Exchange Preference** field, and then click **Submit Trade**.

 This feature only applies to shift exchange posts and is not available for shift trade (giveaway) posts.

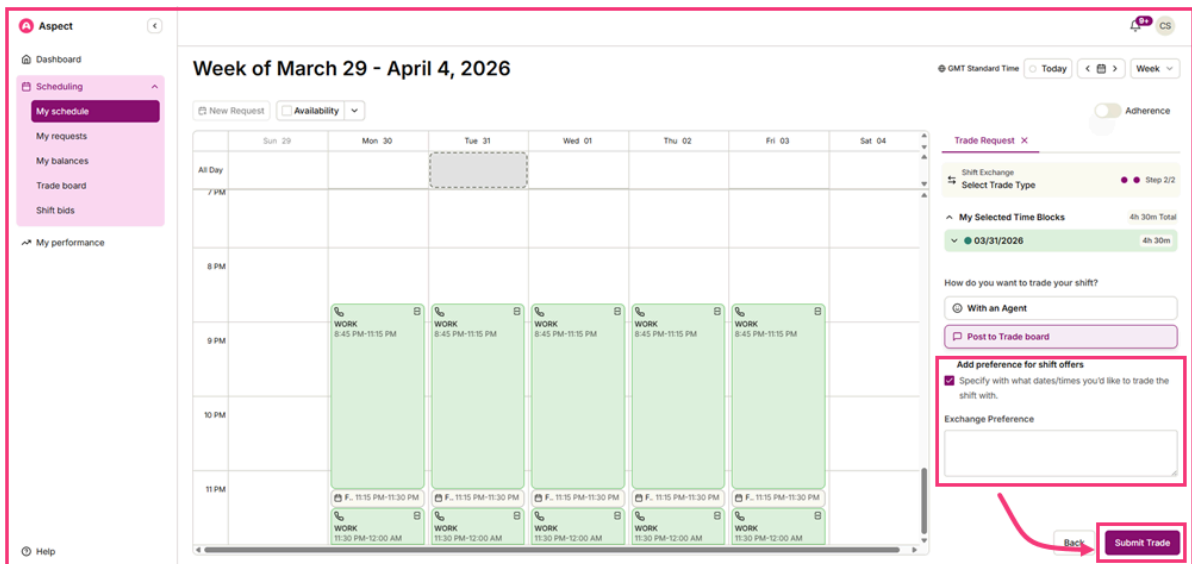


Figure 2-2

3. The post is now available on the Trade board. Click **View Trade on Board** to view the post. Optionally, click **Cancel Trade** to cancel the post.

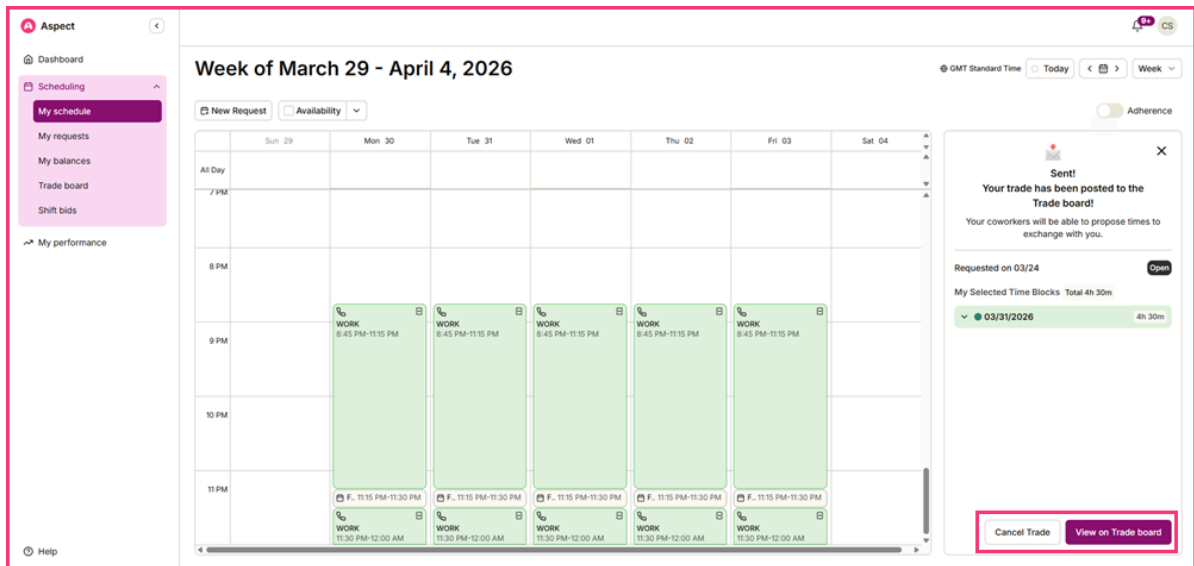


Figure 2-3

Accept a Shift Trade from the Trade Board

1. Expand **Scheduling**, click **Trade board** and select the **shift trade** post you want to accept.
2. Click **Trade Preview** to display a preview of how the shift will look on your schedule.

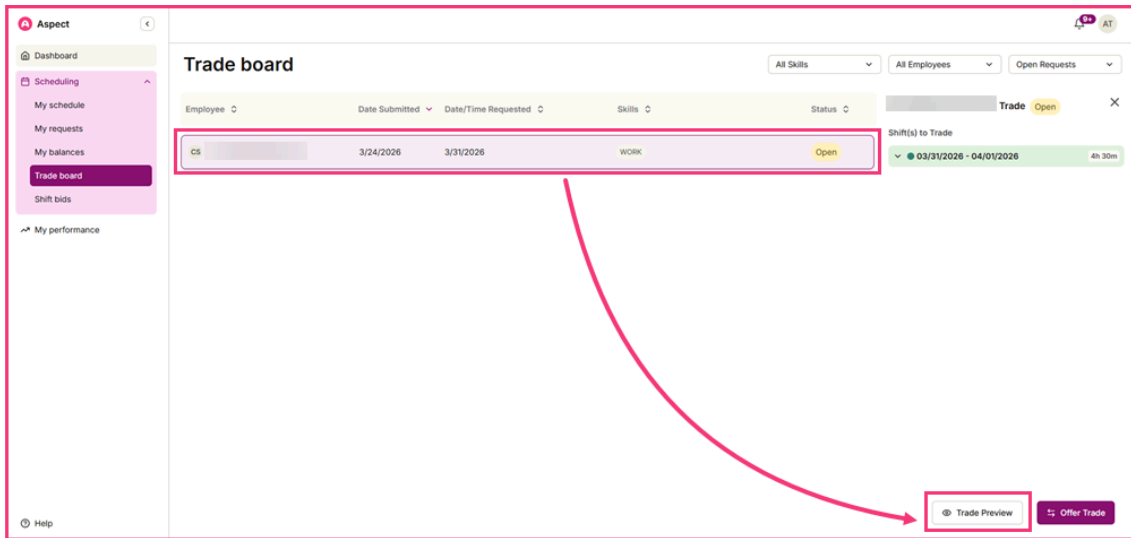


Figure 3-1

- Review how the trade will fit into your schedule and click **Pick up Shift** to accept the shift trade. Optionally, click **Close** to exit the preview.

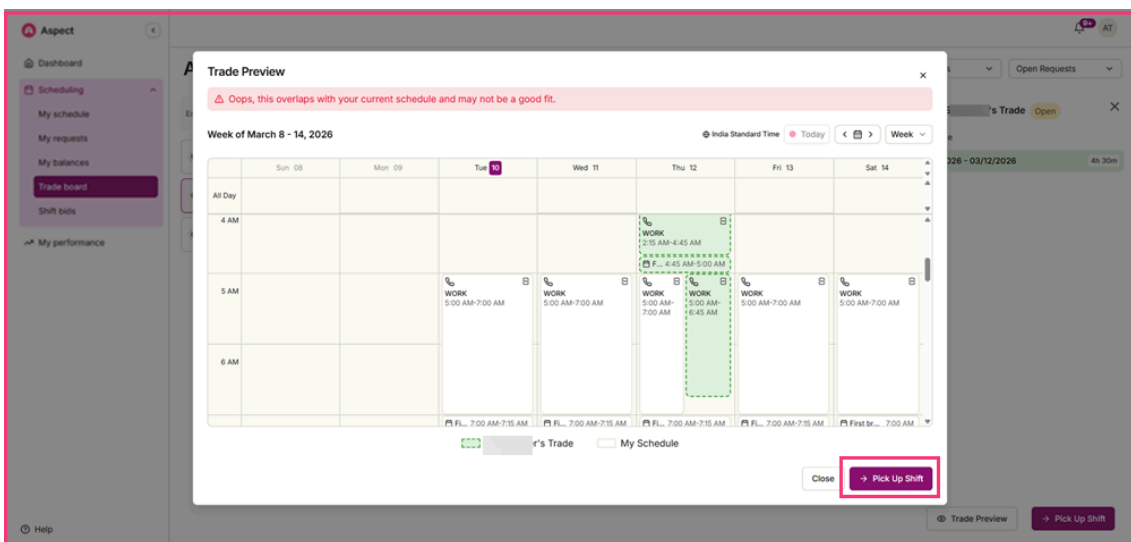


Figure 3-2

- A confirmation pop-up will appear asking if you want to accept the trade. Click either **Confirm** or **Cancel**.



Trades and exchanges are not finalized until they go through WFM Trade and Segment Entry rules. Employees will receive notification alerts when the request is updated. See the [Notifications section](#) for more details.

Accept a Shift Exchange from the Trade board

1. Expand **Scheduling**, click **Trade Board** and select the **shift exchange** post you want to accept.
2. Click **Trade Preview** to display a preview of how the shift will look on your schedule.

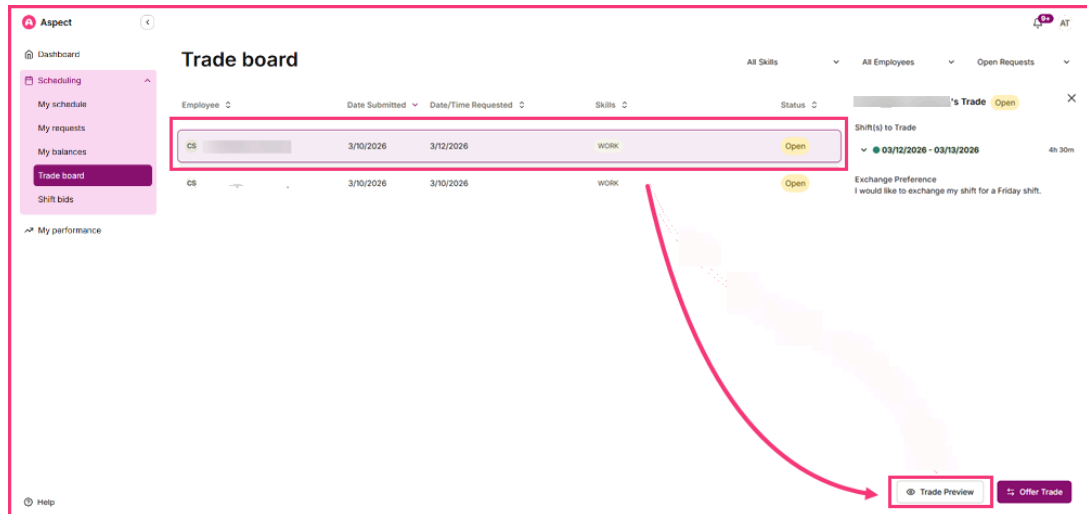


Figure 4-1

3. When you are ready to add one of your shifts to exchange, click **Offer Trade**.

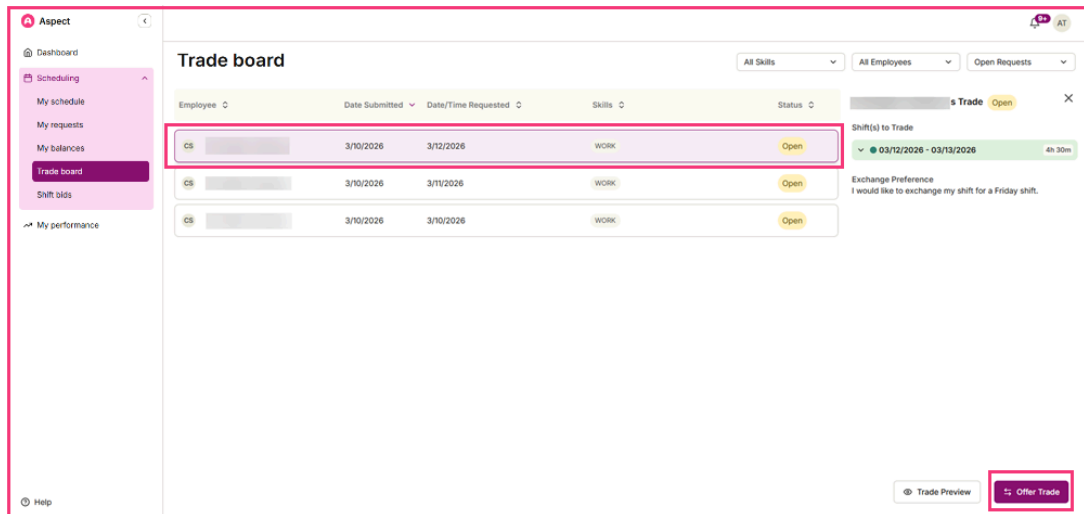


Figure 4-2

- The **Trading with** screen will display a private view of the poster's schedule. This allows you to see which times you should avoid proposing for the exchange.

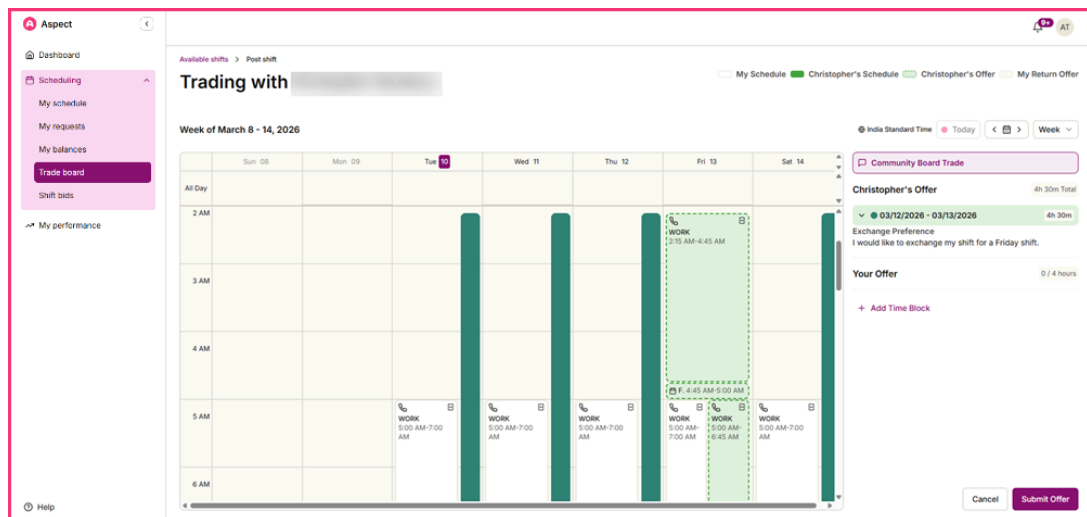


Figure 4-3

- The colored overlays are explained at the top of the screen to help you understand what you are seeing.
 - My Schedule (White)** - Your current schedule.
 - Poster's Schedule (Green)**- The schedule of the employee you are exchanging shifts with.

- **Poster's Offer (Aqua)** - The shift offered for exchange.
- **My Return Offer (Grey)**- The shift you are proposing to exchange.

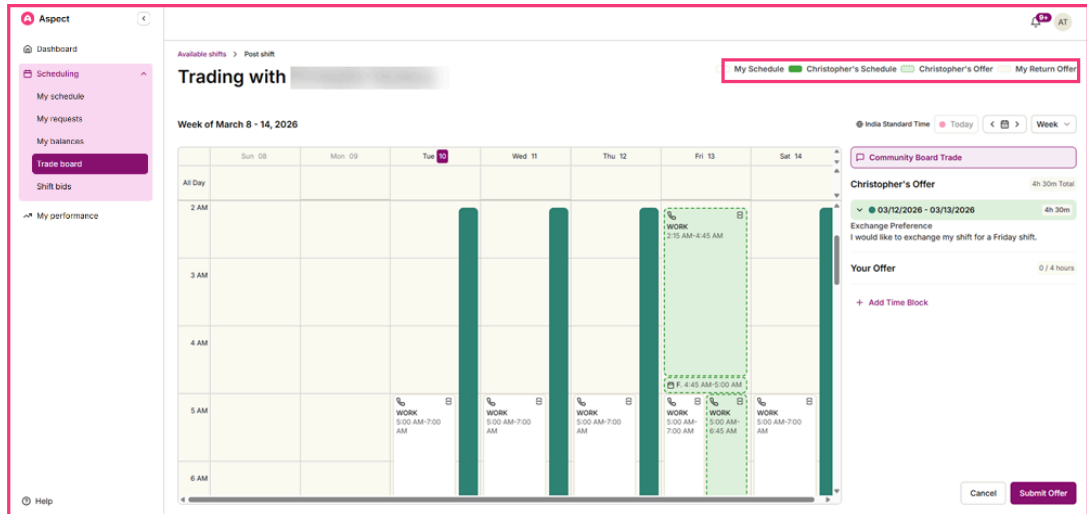


Figure 4-4

6. Click **Add Time Block** and use the **date picker** to select the times for the shift you want to exchange with the poster.

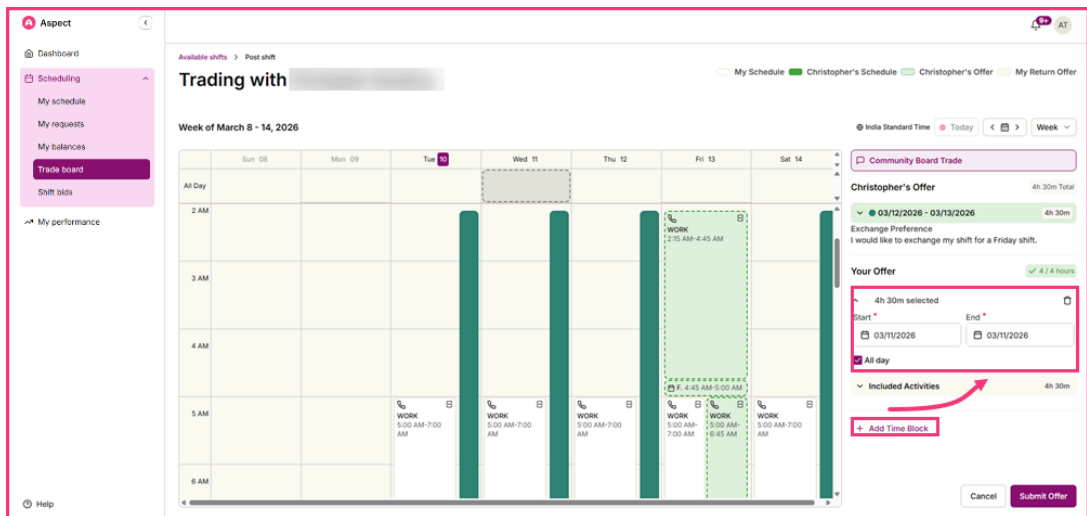


Figure 4-5

7. Review the **Included Activities** and then click **Submit Offer**.

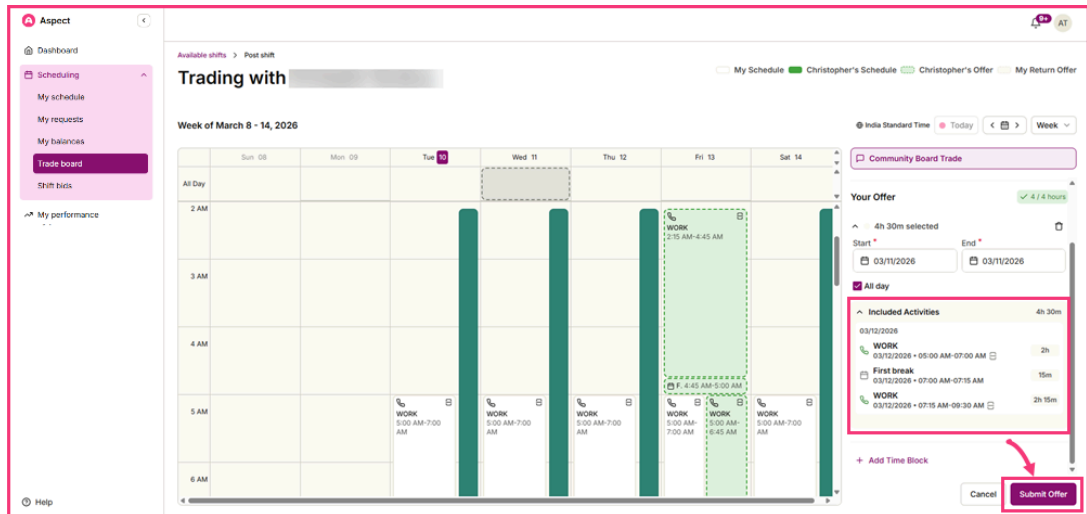


Figure 4-6

8. Click **Return to Board**. Optionally, click **Cancel Offer**.

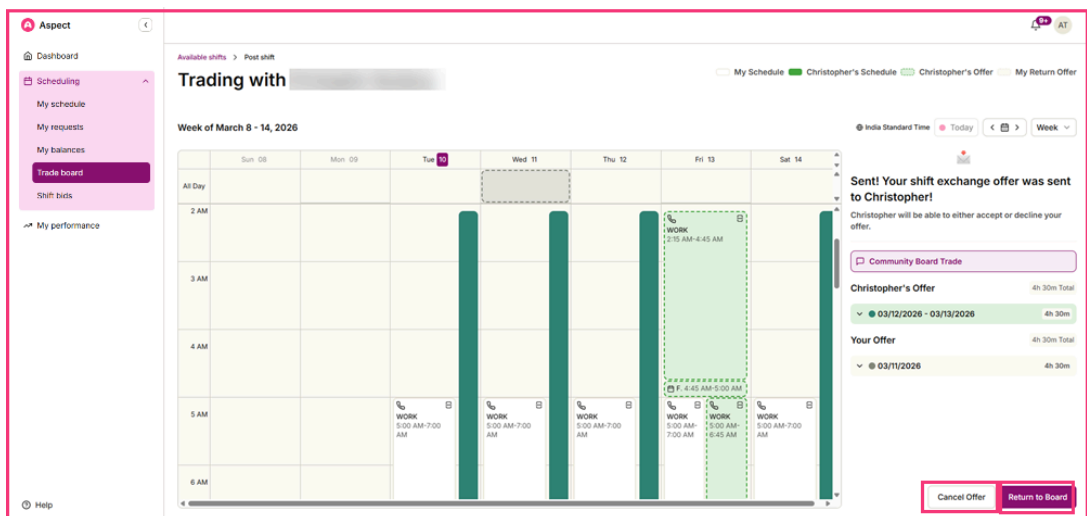


Figure 4-7

! Trades and exchanges are not finalized until they go through WFM Trade and Segment Entry rules. Employees will receive notification alerts when the request is updated. See the [Notifications section](#) for more details.

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Notification Management

▼ Notifications overview

The Notifications center in the New Experience improves work efficiency by consolidating status updates for schedule change requests and announcements into a single, easily accessible location. It ensures that employees are promptly notified of any changes that require their attention, enabling quick decision-making and timely responses.

Employees can view notifications either in the full Notifications Center or through a quick view, where they can see all notifications displayed chronologically, along with the status and details of requests and a schedule preview showing original and new activity requests. Employees can also enable web browser push notifications, if permitted by the company IT system.

▼ Employee: Open the Notifications Center

1. Open the New Experience and log in.
2. There are two ways to view Notifications from within the New Experience:
 - a. In the Notifications Center.
 - b. In a quick view.
3. In the upper right corner of the screen, click the **Notifications** icon and select **View All**.

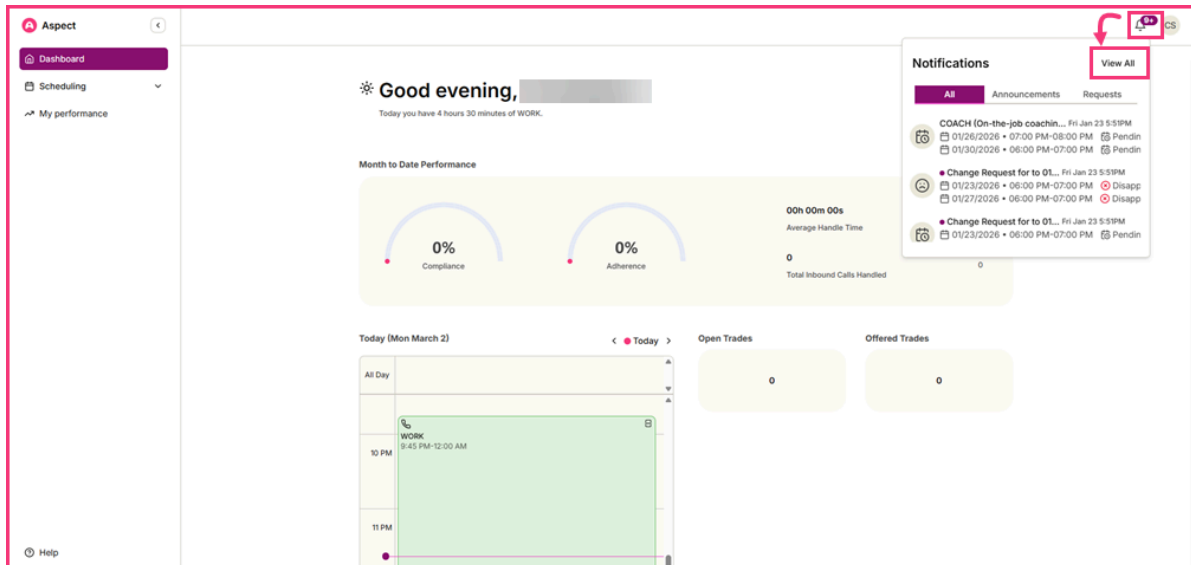


Figure 1-1

4. In the Notifications Center, you will see:

- All notifications displayed chronologically on the left-hand side. See how to [read and filter](#) or [delete notifications](#).
- The **status** and **details** of a request at the top of the screen, when an individual notification is selected. See [what to do if your request is disapproved](#).
- A **Schedule Preview** displaying the original activity and new activity request at the bottom of the screen.

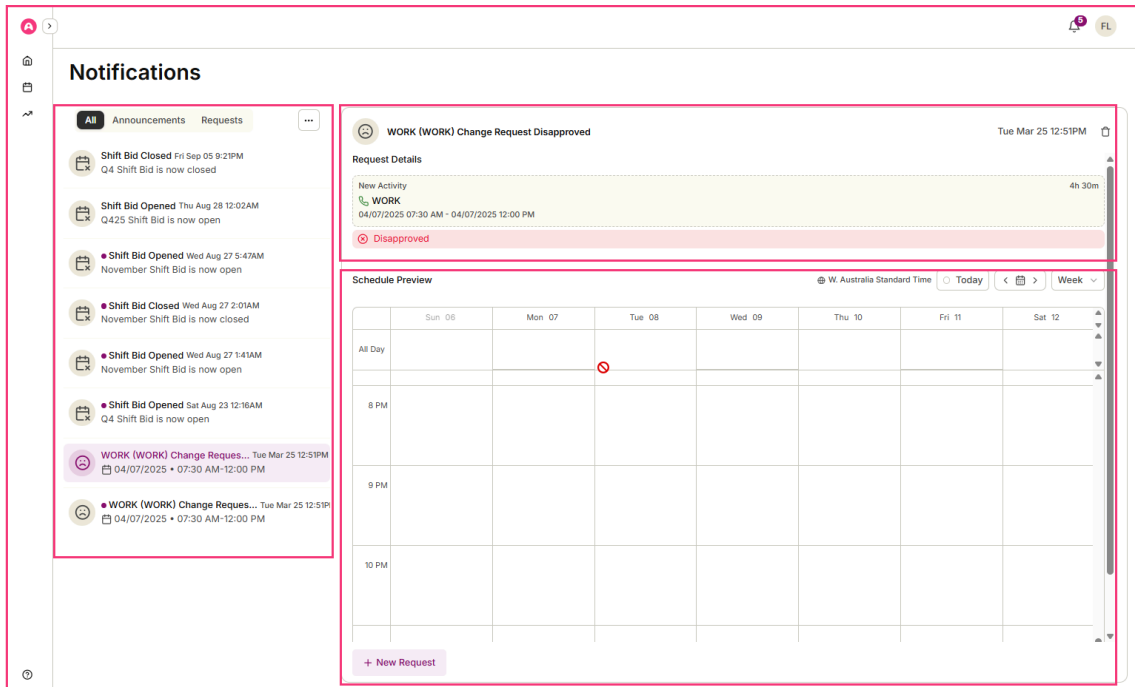


Figure 1-2

[Back to top](#)

▼ Employee: See a quick view of your recent notifications

1. [Open the New Experience and log in.](#)
2. In the upper-right corner of the screen, click the **Notifications** icon and you will see a **quick view** of your recent notifications.
 - The number of unread notifications is shown above the **Notifications** icon. Click on a notification to mark it as read.
 - Unread notifications are marked with a **purple circle** next to them, while read notifications are unmarked.

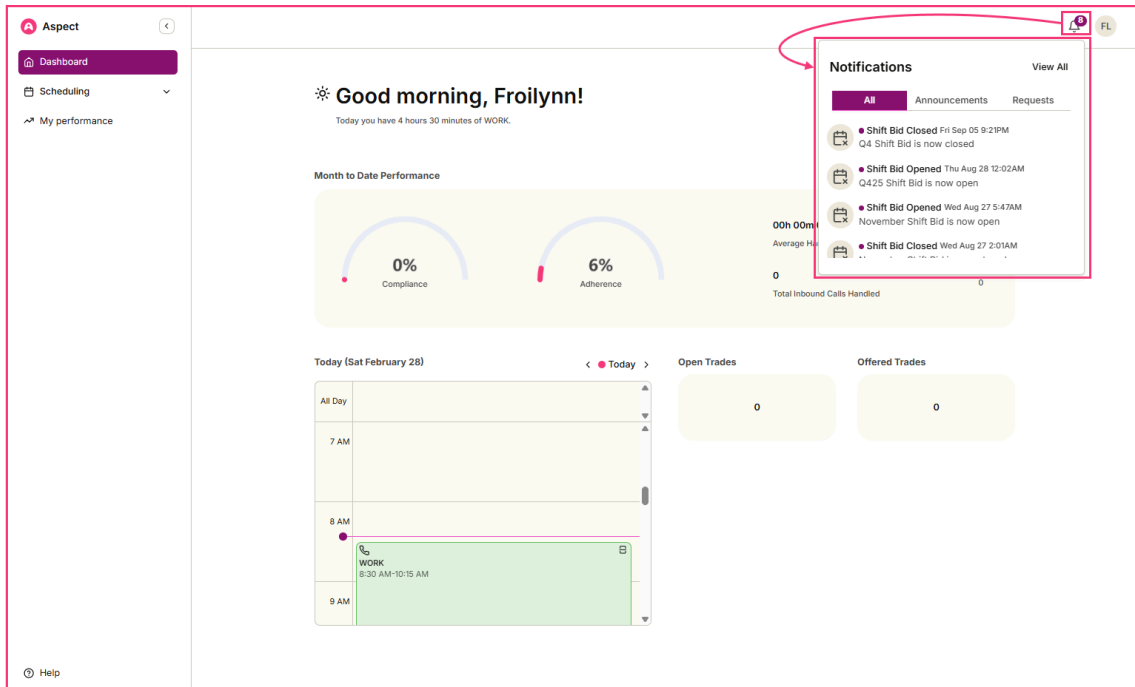


Figure 1-1

3. Click **View All** to manage updates for your recent notifications. Alternatively, click a specific notification to manage updates for that request.
 - The quick view will display:
 - The date and time the request was submitted
 - The status of the request
 - The date and time the request was approved or disapproved

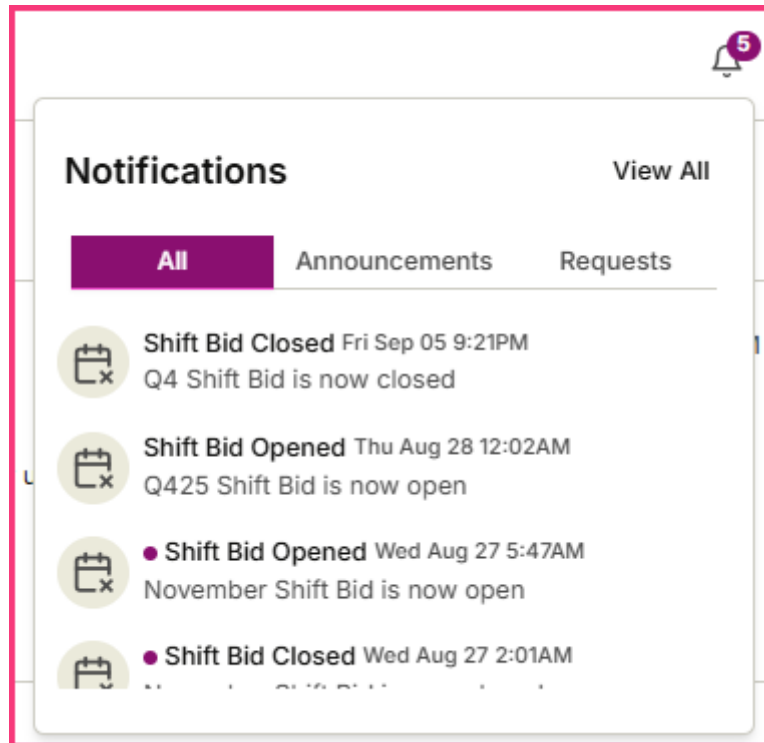


Figure 1-2

[Back to top](#)

▼ **Employee: Read and filter your notifications**

1. [Open the New Experience and log in.](#)
2. In the upper right corner of the screen, click the **Notifications** icon.

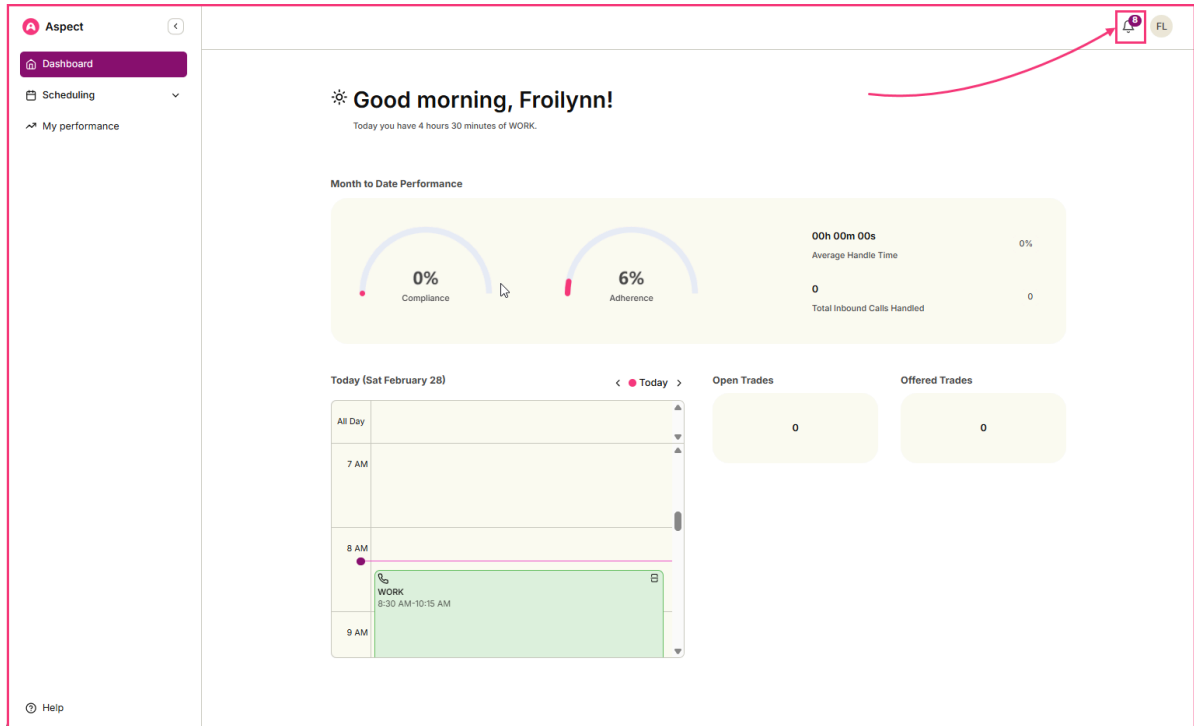


Figure 1-1

3. Your notifications will appear on the left side of the screen. Click the **ellipses** to show options for marking notifications as **read**, **unread** or to **delete**.
 - To multiselect notifications, hold **CTRL** with your keyboard and select multiple notifications with your mouse.

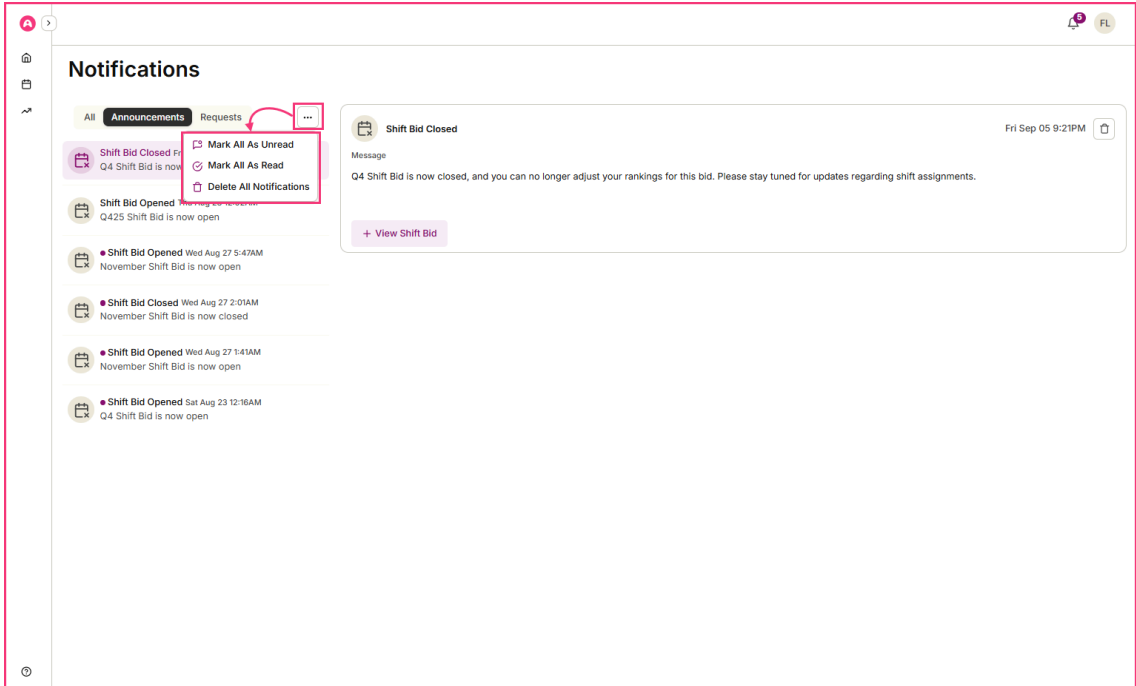


Figure 1-2

- To filter notifications, click **Requests** and select the checkbox next to **Approved**, **Disapproved**, **Pending** or **Cancelled**.

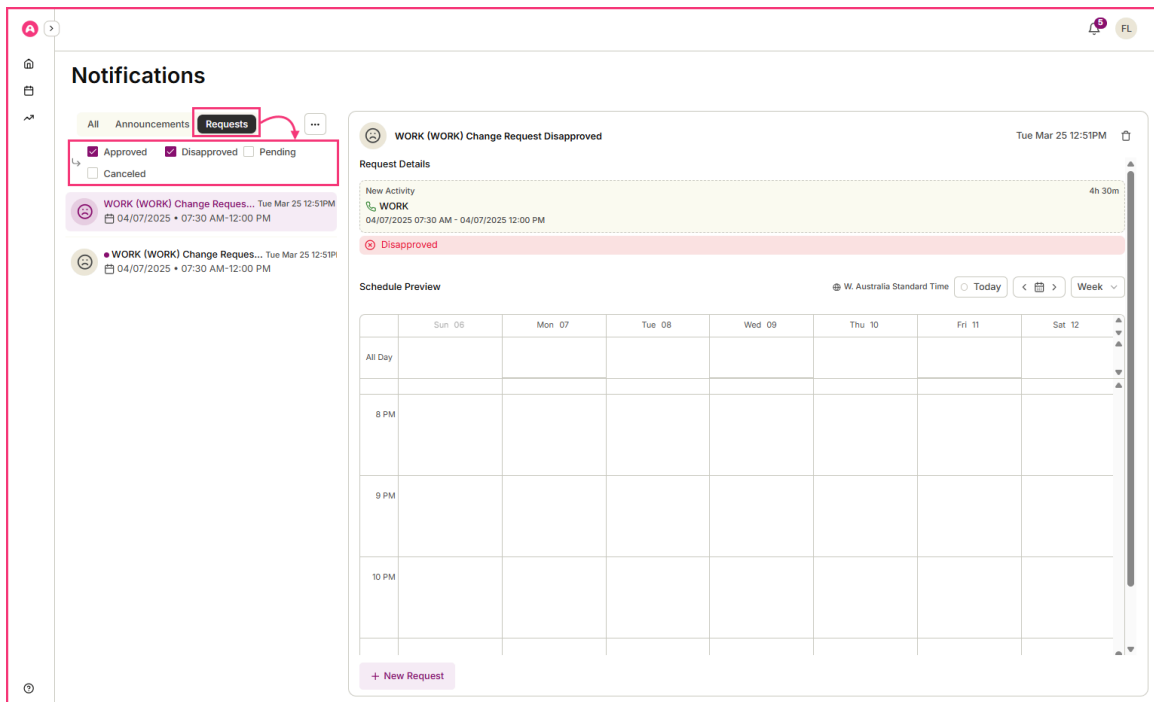


Figure 1-3

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▼ Employee: Delete a notification

1. [Open the New Experience and log in.](#)
2. In the upper-right corner of the screen, click the **Notifications** icon.

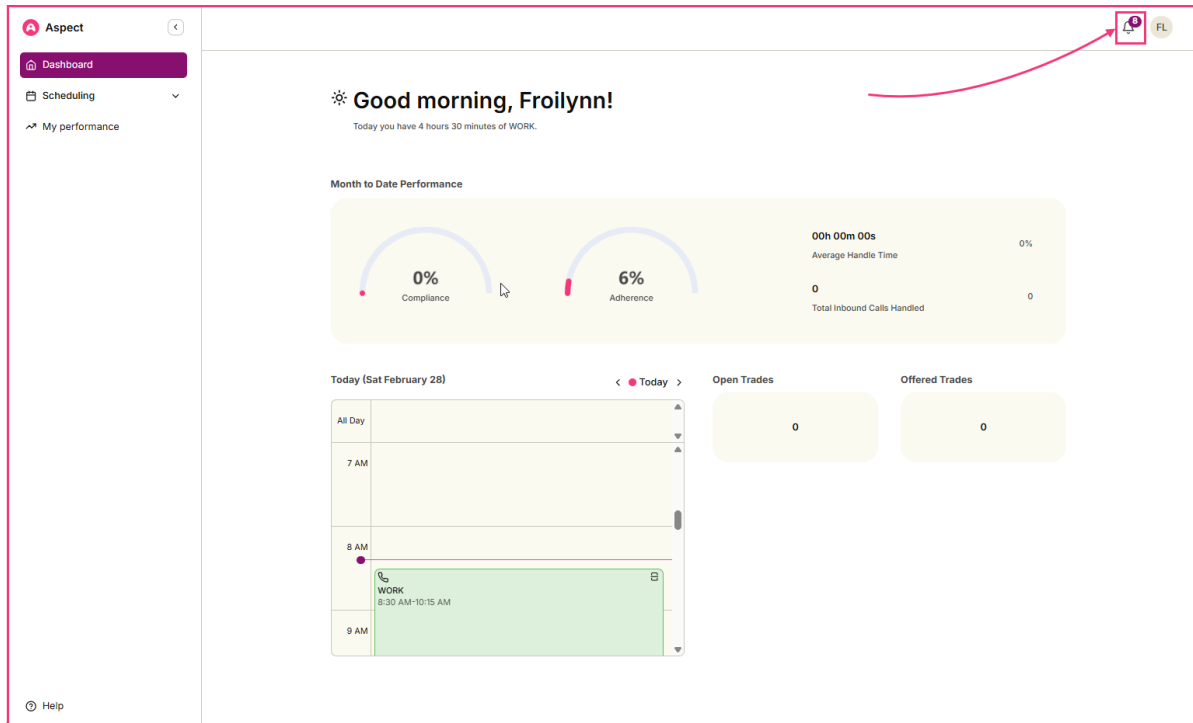


Figure 1-1

3. Select the notification you want to delete and click the **trash** icon on the right side of the screen. To multiselect notifications, press **Shift**, **Ctrl**, or **Ctrl+A** with your keyboard and select multiple notifications with your mouse.



Optionally, you can right-click a notification and click **Delete Notification > Delete**.

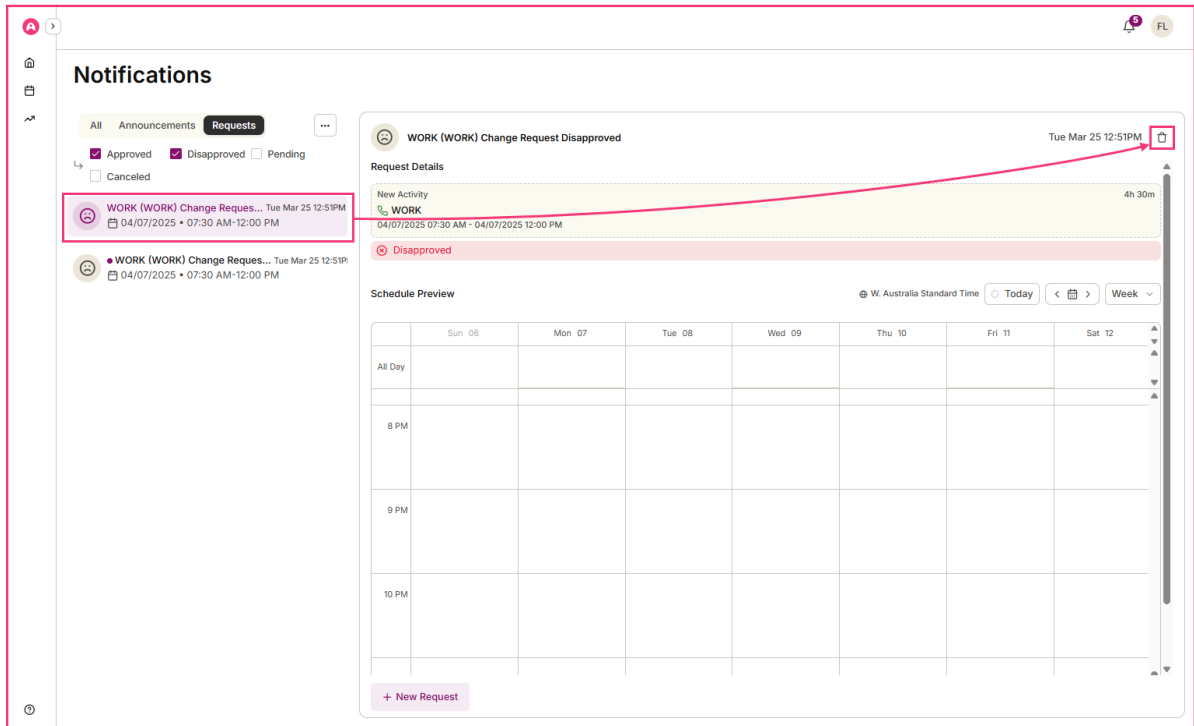


Figure 1-2

4. Confirm you want to delete the selected notification and click the **check mark**.



- Trade notifications for trades in Open status will not be deleted as part of the **Delete All** or the right-click **Delete Notification** option.
- When a sender deletes an **Open** trade notification using the **trash** icon, they'll receive a warning that this action will both cancel the open trade and delete the notification. Both the sender and receiver will then receive a **Canceled** notification.
- When a receiver deletes an **Open** trade notification using the **trash** icon, they'll receive a warning that this action will both decline the open trade and delete the notification. Both the sender and receiver will then receive a **Declined** notification.

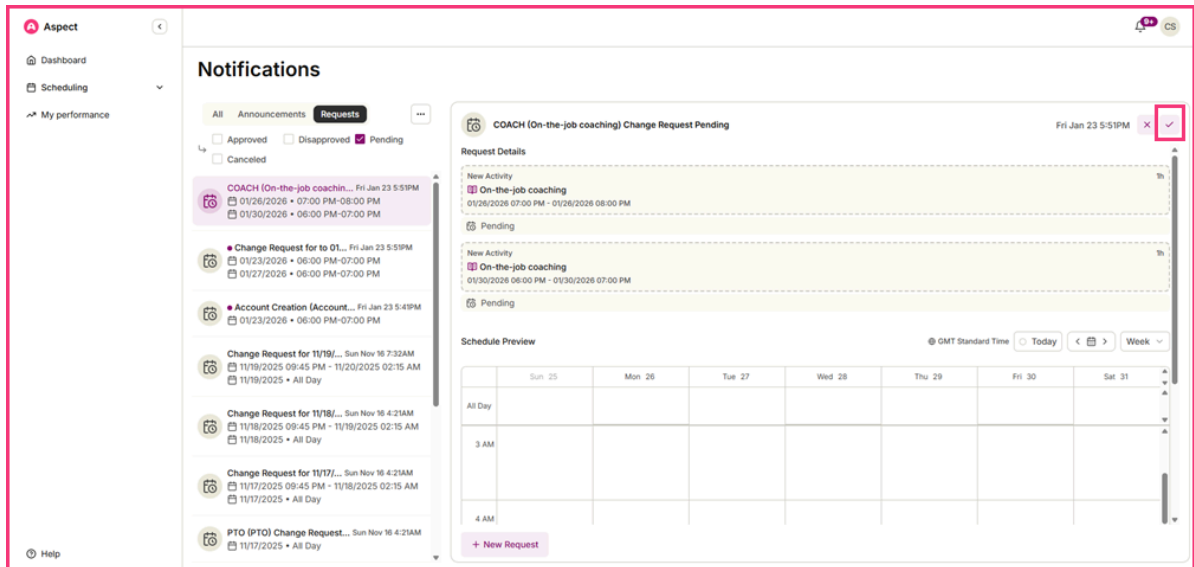


Figure 1-3

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▼ **Employee: Create a new request if your request is disapproved**

1. [Open the New Experience and log in.](#)
2. In the upper-right corner of the screen, click the **Notifications** icon.

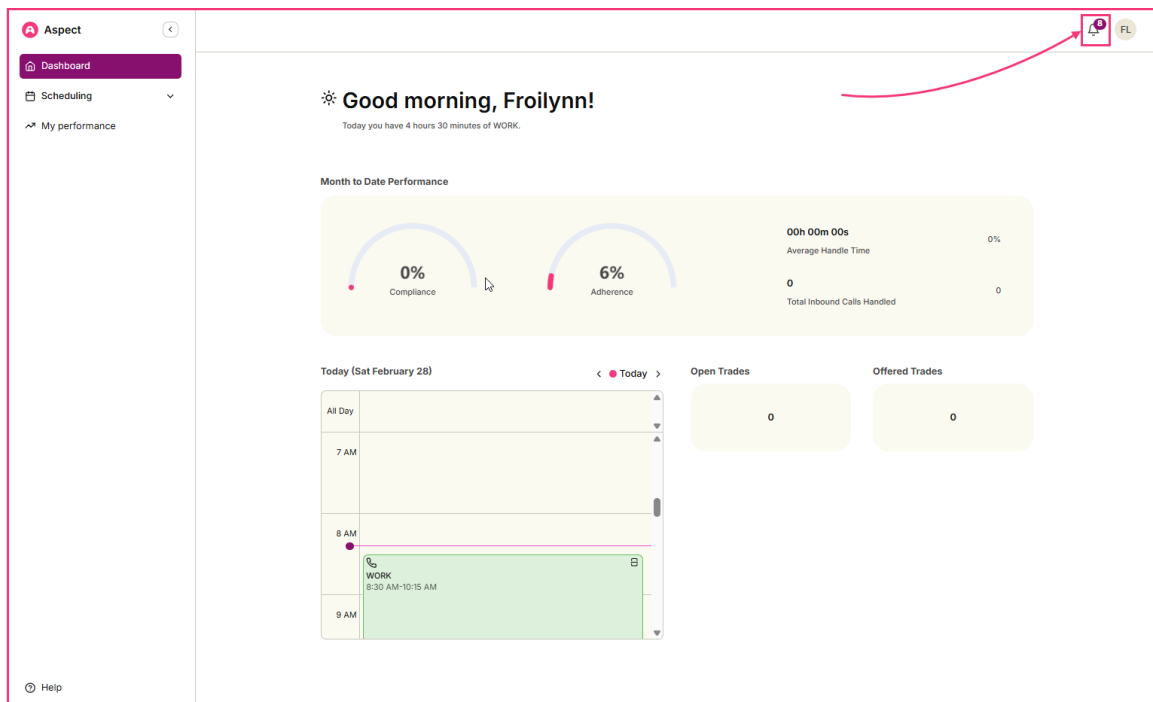


Figure 1-1

3. Find the disapproved request, review the details and comments, then click **New Request** to resubmit.

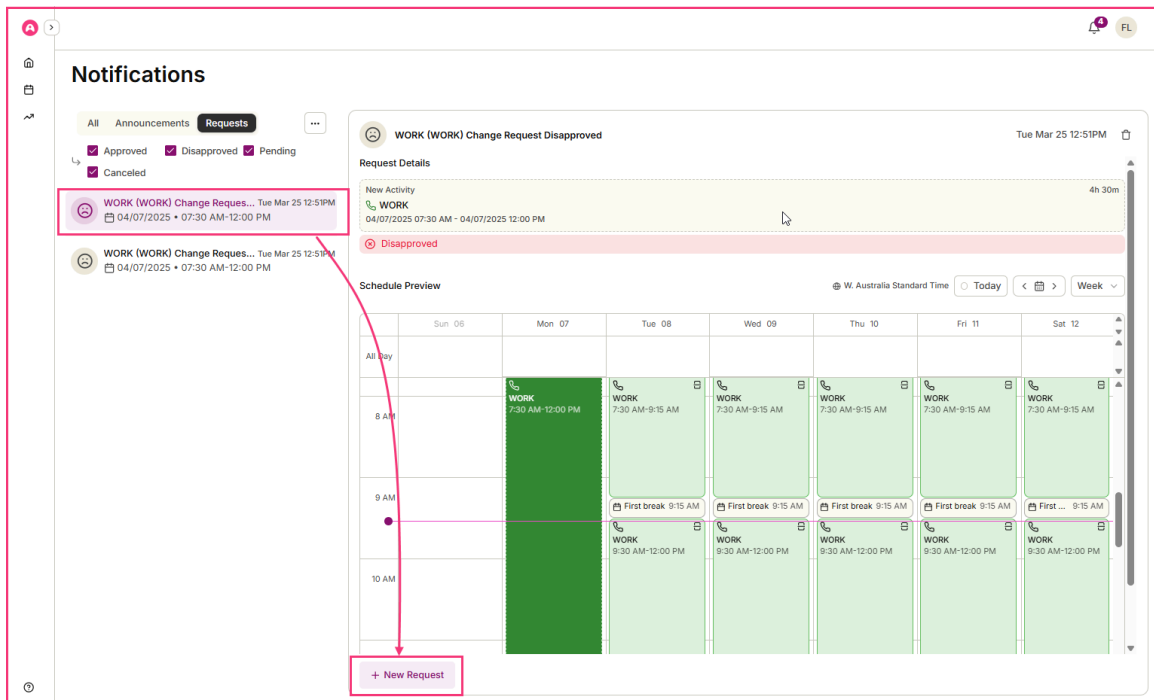


Figure 1-2

4. Create and submit a new activity request.

▼ **Employee: Accept or decline Shift Trade or Exchange requests**



When a sender initiates a Shift Trade or Exchange request, both the sender and receiver receive a notification containing the request details.

1. To open a Shift Trade/Exchange request notification, click the **Notifications** icon in the upper-right corner of the screen, then click the specific Shift Trade/Exchange notification.

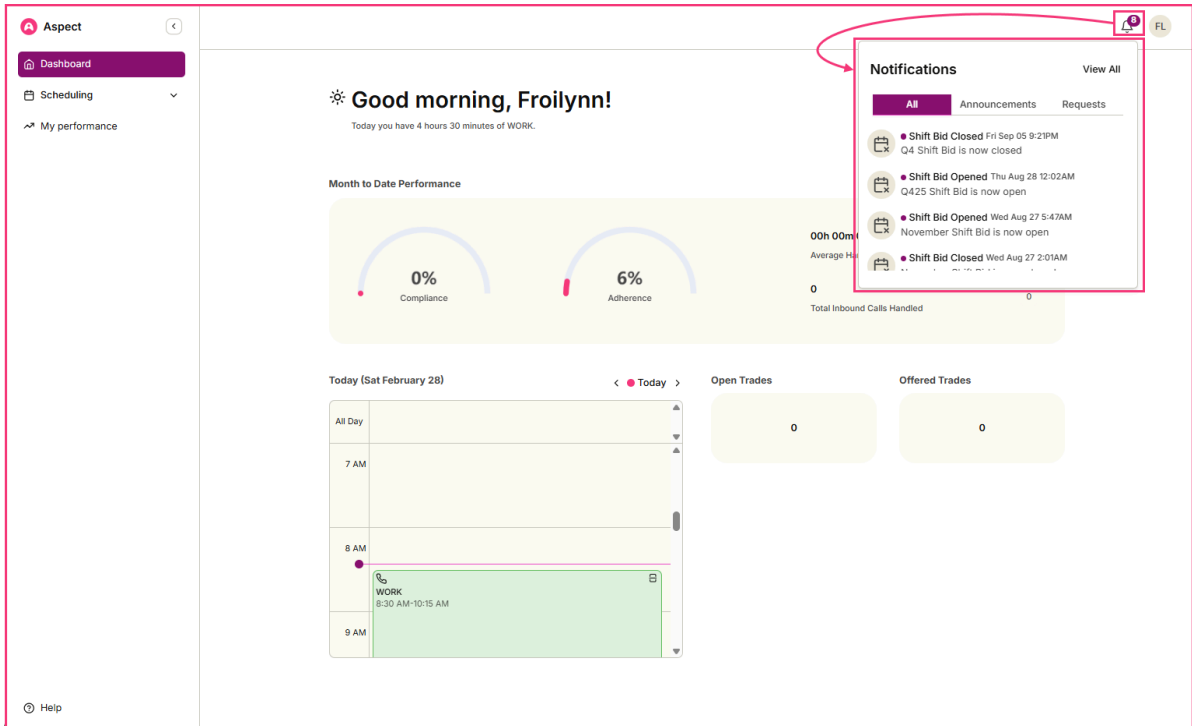


Figure 1-1

2. You will see a preview of how the Shift Trade/Exchange will look on your updated schedule. Click **Collapse** to return to the previous view.

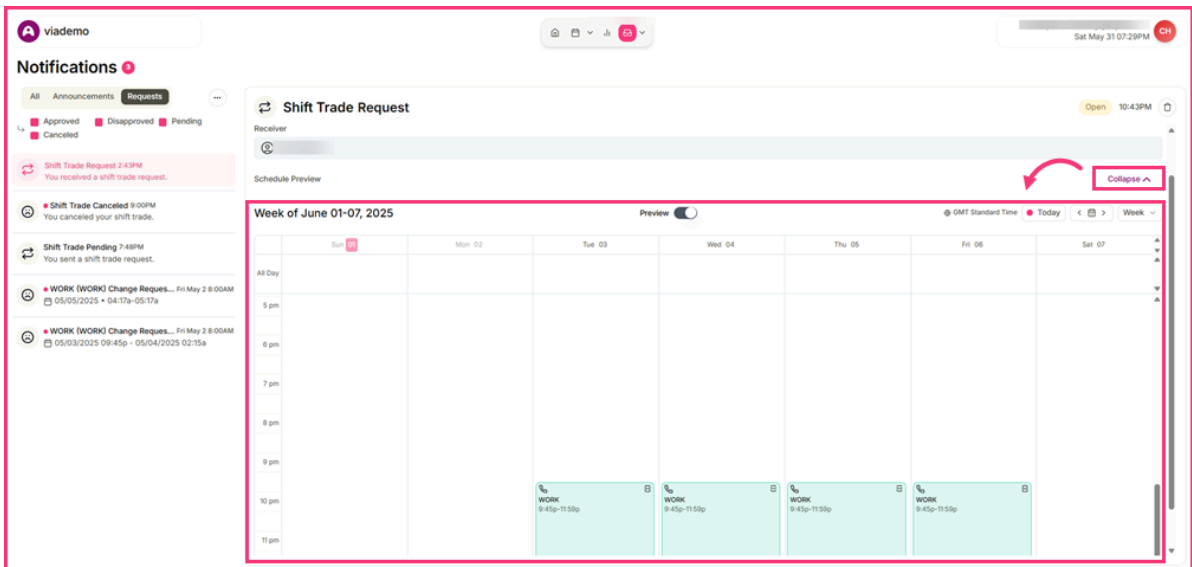


Figure 1-2

3. To accept the Shift Trade/Exchange request, click **Accept**. To decline the Shift Trade/Exchange request, click **Decline**.

- When a Shift Trade/Exchange is accepted, it must still go through WFM processing before becoming Official. Both the sender and receiver will get notification updates with the latest trade status.

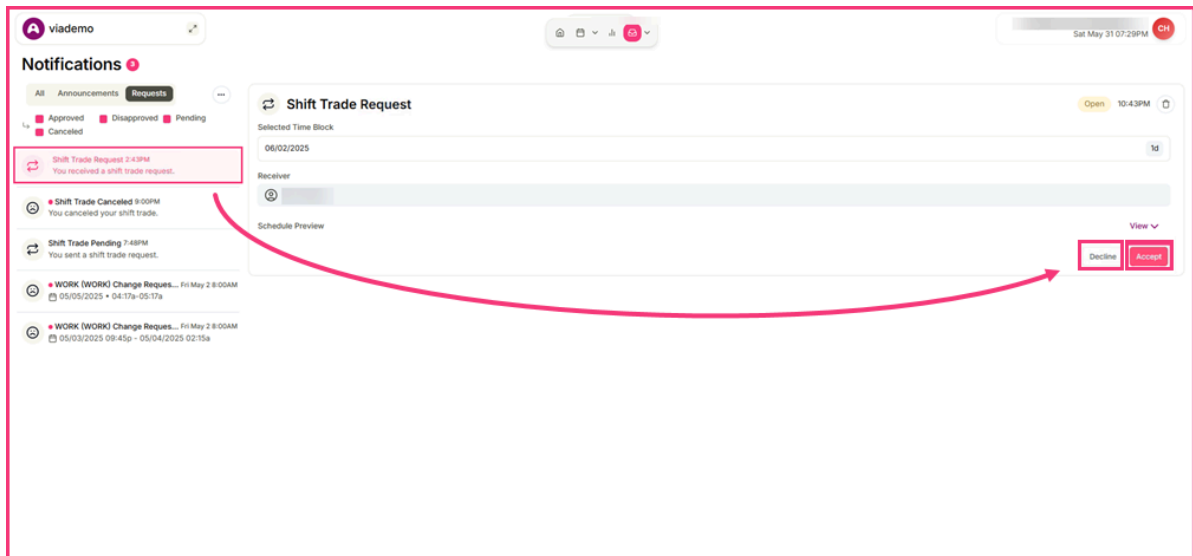


Figure 1-3



Shift Trade/Exchange request statuses are updated automatically.

- **Pending:** The request is processing but not yet in sync with the WFM database. The request cannot be cancelled in this status.
- **Open:** The request is currently open and can be canceled. A **Cancel Trade** button appears at the end of the trade summary.
- **Accepted:** The request has been accepted by the receiver, but is not yet official and still must go through WFM processing.
- **Declined:** The request was declined by the receiver.
- **Official:** The request has been accepted and completed WFM processing.
- **Failed:** The request failed to process through the WFM rules successfully.
- **Voided:** The request was accepted by one receiver, which automatically voids it for any other employees who received it.
- **Cancelled:** The request was cancelled by the sender.

▼ Employee: Enable or Disable Push Notifications



Web Browser Push Notifications enables browser push notifications for **employees**, including schedule changes and automatic schedule updates. This ensures employees don't miss time-sensitive updates—such as schedule changes, request status change, and messages sent by Admins.



Web Browser Push Notification are supported by the following browsers:

- Google Chrome
- Microsoft Edge
- Mozilla Firefox

1. Open the New Experience and log in.
2. Click the **Profile** icon and select **Personal Settings**.

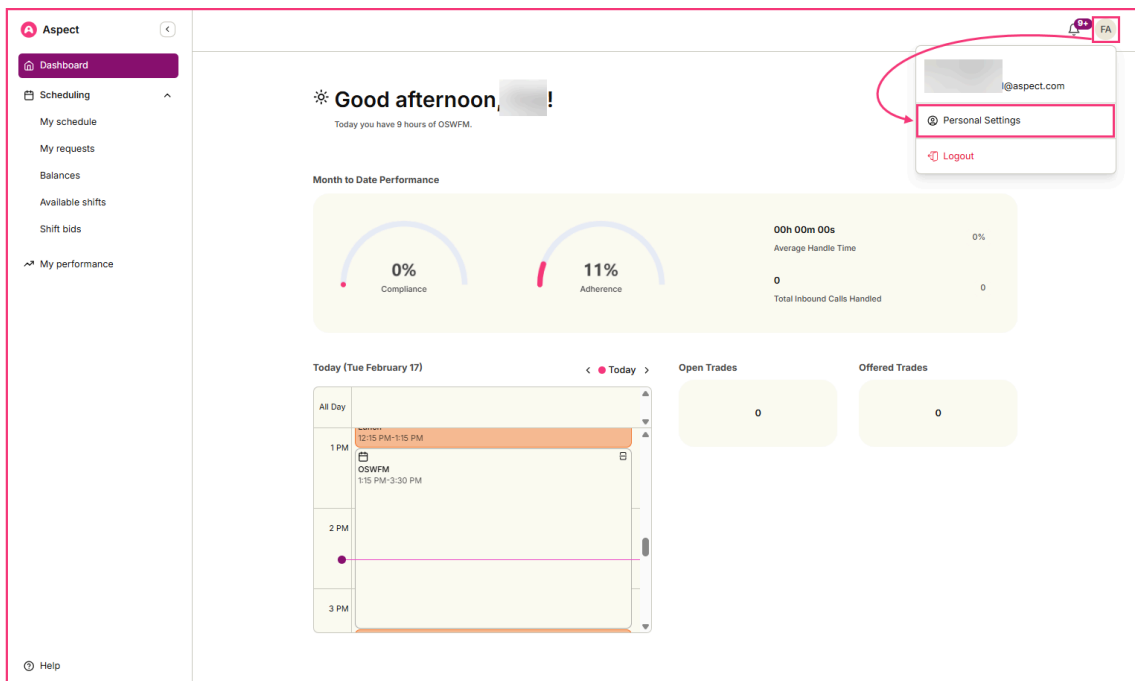


Figure 1-1

3. Click **Notifications**.

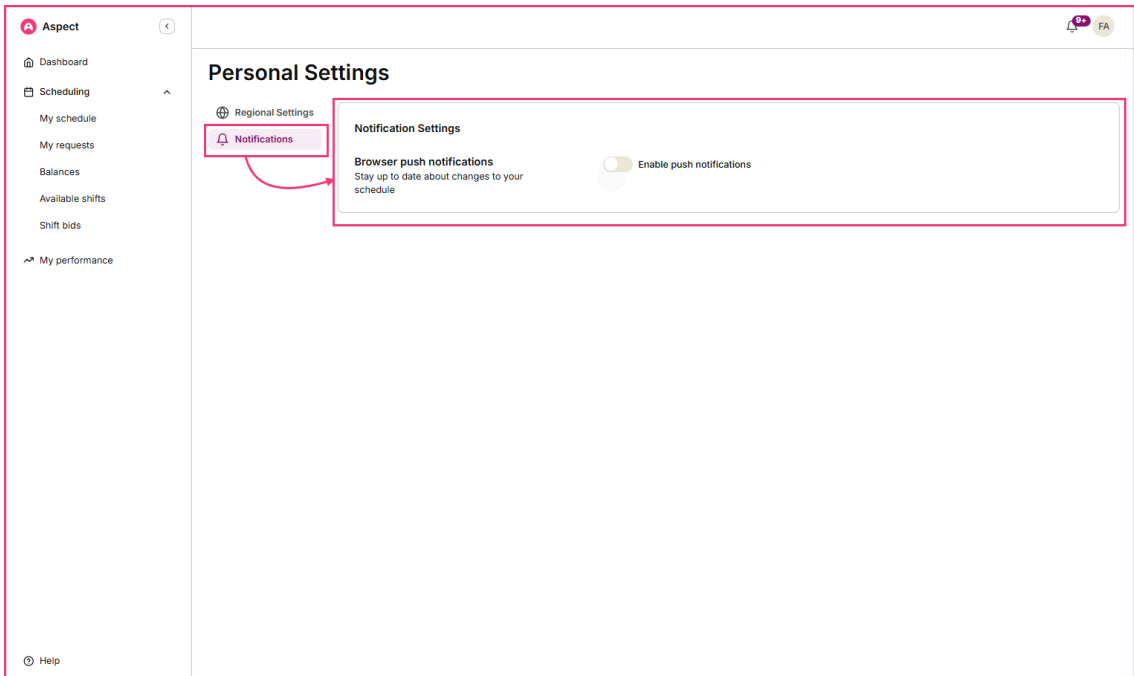


Figure 1-2



If your organization's administrator or IT department manages your browser, the **Notification** screen will display this:

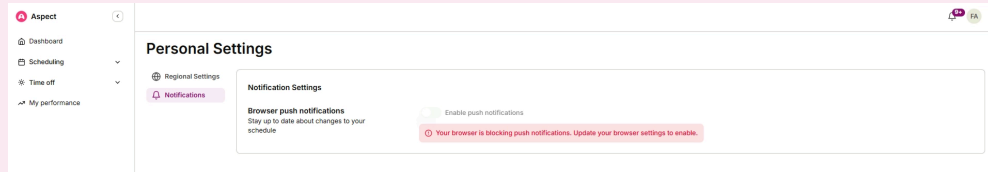


Figure 1-3

You can also check this by navigating to your browser settings and selecting **Privacy and Security**.

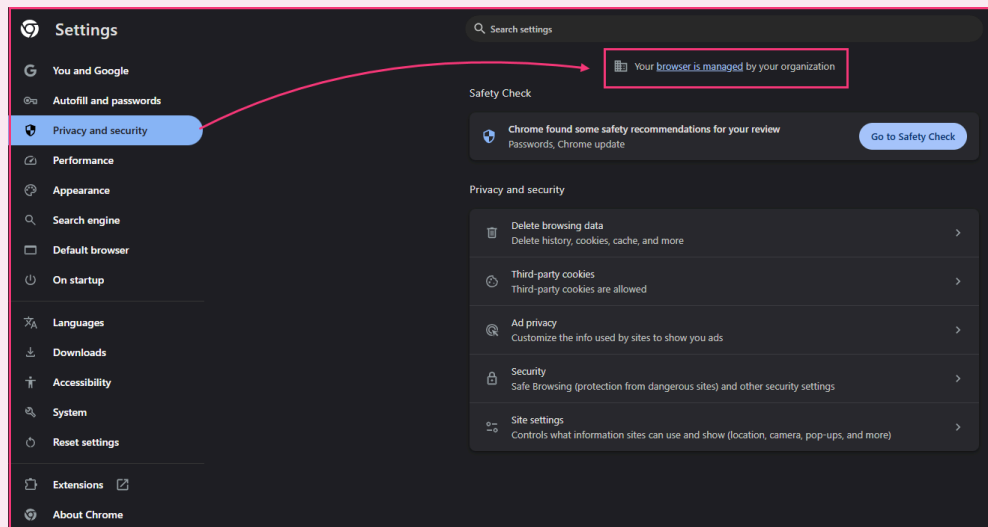


Figure 1-4

4. Click the toggle next to **Enable push notifications**. To disable or pause notifications, click the toggle again.



When you enable push notifications a browser permission prompt appears asking if you want to allow push notifications in your web browser.

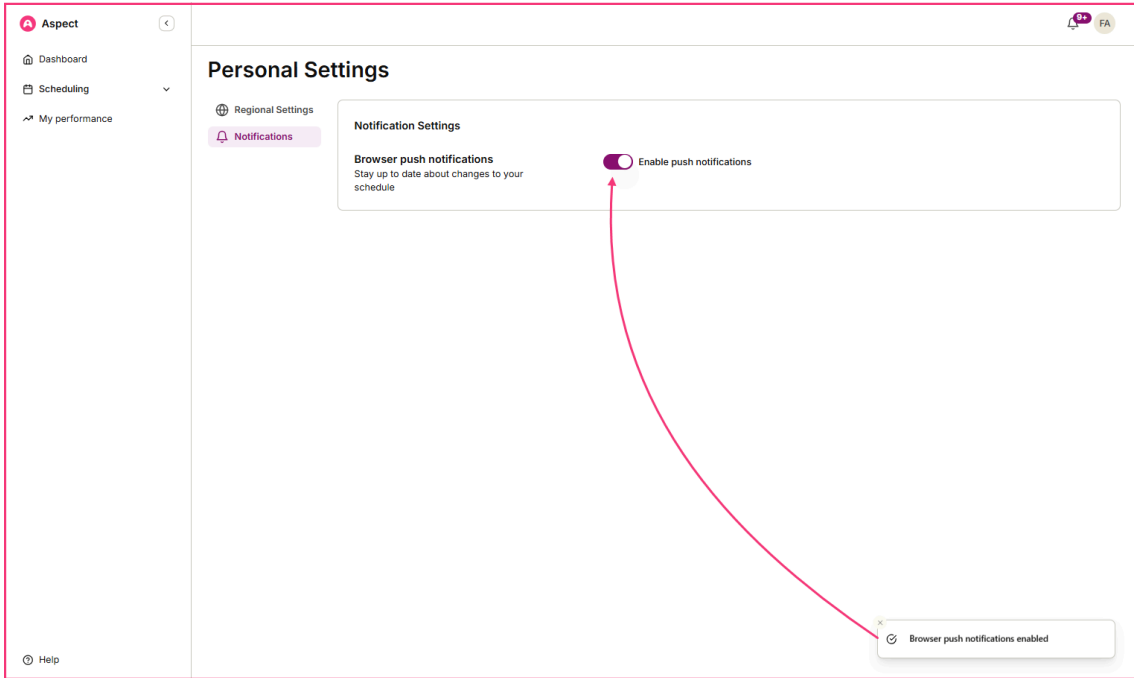


Figure 1-5

5. If the Browser push notification toggle is disabled, you may need to perform additional steps in your web browser.

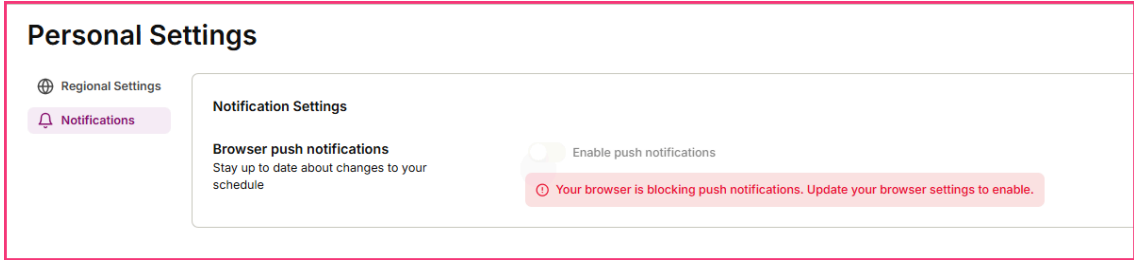


Figure 1-6

a. Navigate to the web browser's setting by clicking the three-dotted menu and select **Settings**.

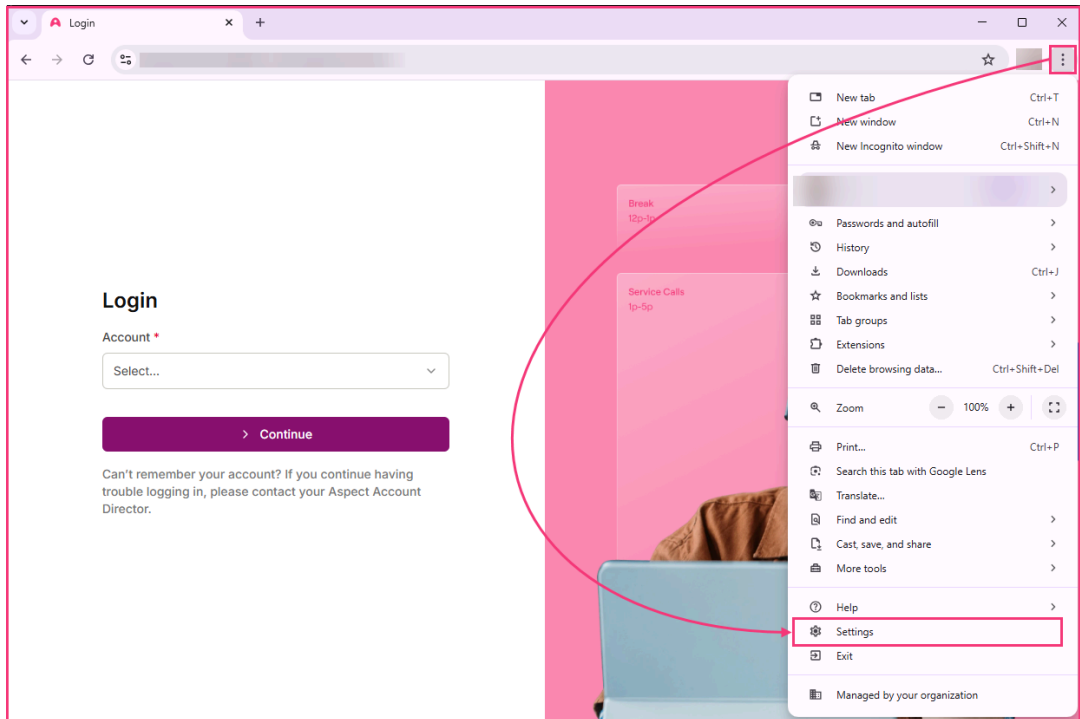


Figure 1-7

b. Navigate to **Privacy and Security**, then select **Site Settings**.

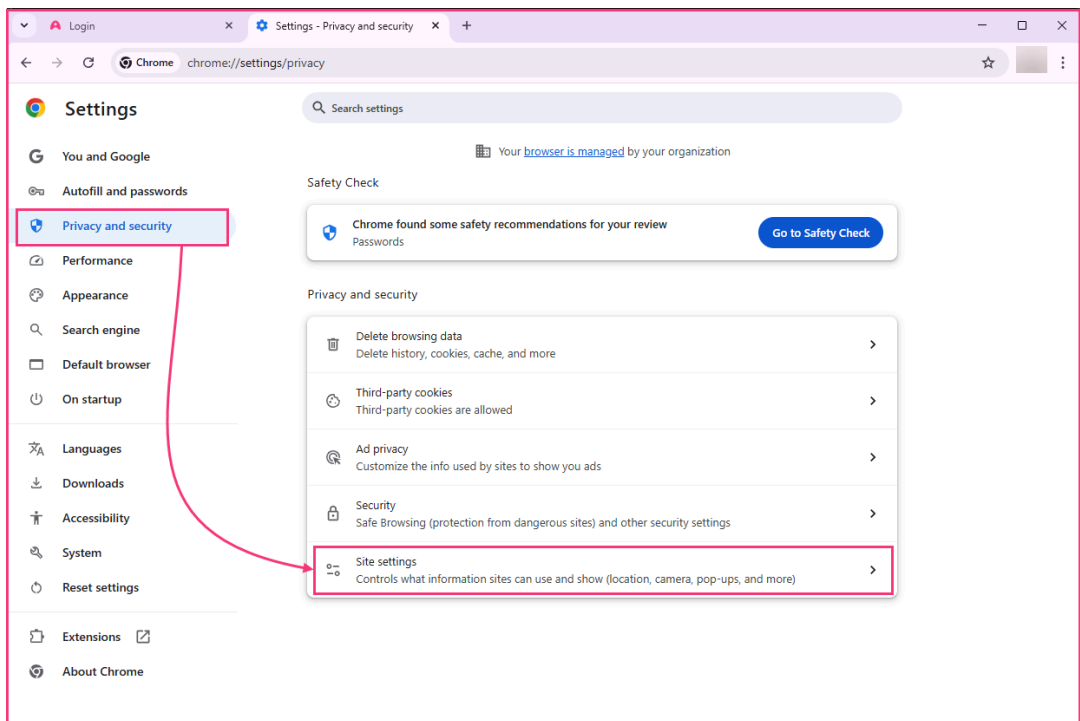


Figure 1-8

c. Select **Notifications**.

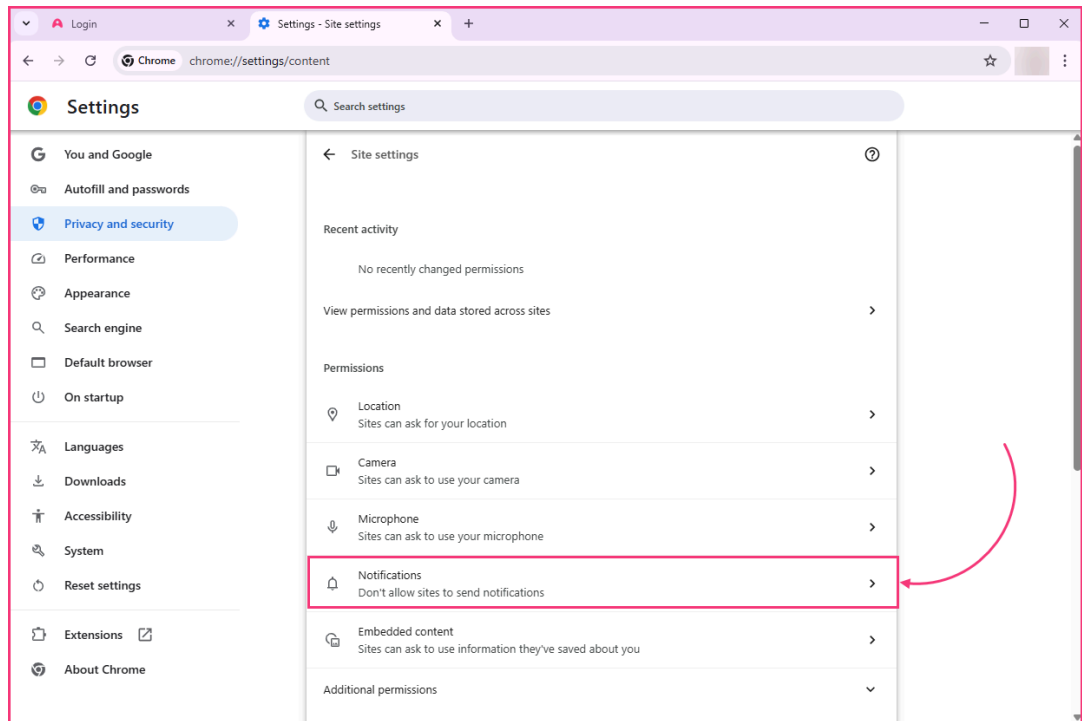


Figure 1-9

d. Ensure that **Sites can ask to send notifications** is enabled.

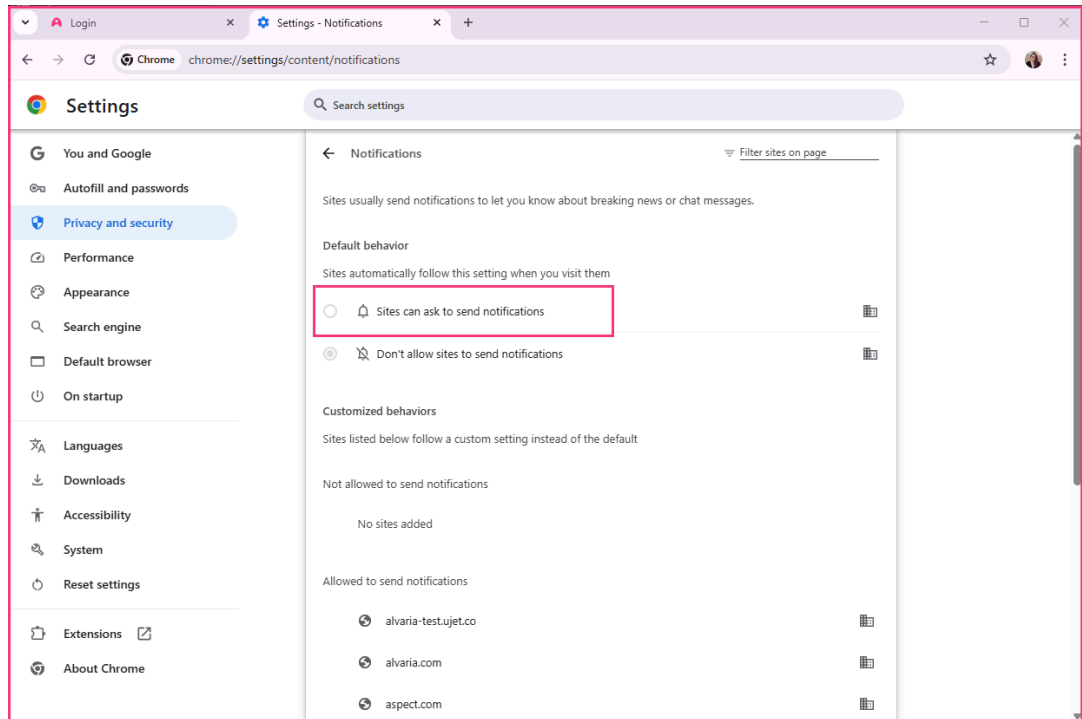


Figure 1-10

e. Add the URL to the **Allowed to send notifications** list.

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FAQ

▼ Employee FAQs

▼ How do I create, edit or apply an Activity Template?

[Create, edit or apply a Activity Template.](#)

▼ Before submitting a schedule change request, how can I check the available time allowances for my personal and group accounts?

[Add a layer to check availability.](#)

▼ How do I request a full day off or a change to my shift?

See how to [request a change to your shift.](#) See how to [submit a PTO request.](#)

▼ **Will I receive notifications when I submit a request?**

Yes. See [how to view recent notifications](#).

▼ **What types of notifications are available?**

Only schedule change notifications are available. See [how to view recent notifications](#).

▼ **I submitted a schedule change request using the New Experience how does my manager approve it?**

Once you submit a request in the New Experience, your Manager can review the details of your request directly within the WFM or via email depending on how your classic product is set up.

You will then [receive a notification](#) about the status of your request once your manager has made a decision.

▼ **Will the schedule change requests made in the New Experience appear in WFM, or do I have to submit a request in both products?**

Schedule change requests made in the New Experience will automatically appear in the WFM. You will not need to submit requests in both products.

▼ **How do I add extra time to my schedule?**

1. [Add a layer to check schedule availability](#).
 2. [Create, edit or apply a Schedule Preference](#).
-

▼ **How will I know if my schedule request for extra time is approved?**

Once your request for extra time is approved, you will receive an [approval notification](#). Check your schedule to see the newly approved time slots reflected in your calendar.

▼ **Why was my schedule request for extra work hours disapproved automatically?**

When an employee submits a request for extra work hours, they will get denied automatically because of an integration issue with WFM that will be

resolved in an upcoming version release. See how to [perform a workaround for this issue](#).

▼ What actions are available if my schedule change request is disapproved?

If you receive a [disapproved request notification](#), view the details and resubmit the request taking the received details into consideration.

▼ How do I start a Shift Trade request?

See how to [initiate a Shift Trade Request](#).

▼ Admin FAQs

▼ How do I invite my team?

1. [Log into the New Experience as an Admin](#).
 2. [Send an invite to your employees](#).
-

▼ Where do I approve all the requests made in the New Experience?

Admins will approve requests in WFM for now, but the approval function will be moved to the New Experience soon.

▼ Are the New Experience and WFM two different products?

Aspect Cloud Workforce (the New Experience) is separate application that is designed to provide Admins and Employees an improved user experience.

▼ How are the predictions and suggestions for shift changes created?

The predictions and suggestions are based off of the Intra-Day Staffing Balances, Personal Accounts and/or Group Allowance Reports.

If there is no Staff Group, Personal Account or Group Allowance Account selected, then the corresponding data won't be used in the predictions or suggestions.

The Employees can choose if they want Intra-Day Staffing Balances to be checked by selecting a staff group, or by selecting a Personal Account if they want Personal Accounts to be checked and by selecting a Group Allowance Account if they want Group Allowances to be checked.

▼ **How are the New Experience and WFM related?**

WFM is the engine and database powering the New Experience interface. Employee schedule's created in WFM are automatically imported to the New Experience when the integration between the two is enabled.

▼ **How many user roles are there?**

There are three user roles; Employee, Regular user, and Admin. Employee and Regular user email addresses must be registered and activated in Aspect WorkforceOS, before they can be activated in the New Experience. You can not add Employee or Regular user emails directly from the New Experience.

▼ **How do I enable Federated Login and what is its functionality?**

See the [Federated Login overview](#) article for more information.

Troubleshooting

▼ **Troubleshooting overview**

This section provides information on how to run troubleshooting techniques in Aspect Cloud Workforce (the New Experience).

▼ **Reset your password**

1. [Open the New Experience](#), select your **Account** and click **Reset Password**.



If you don't know your Account name, look for it in your invite email or contact your Workforce Administrator for more help.

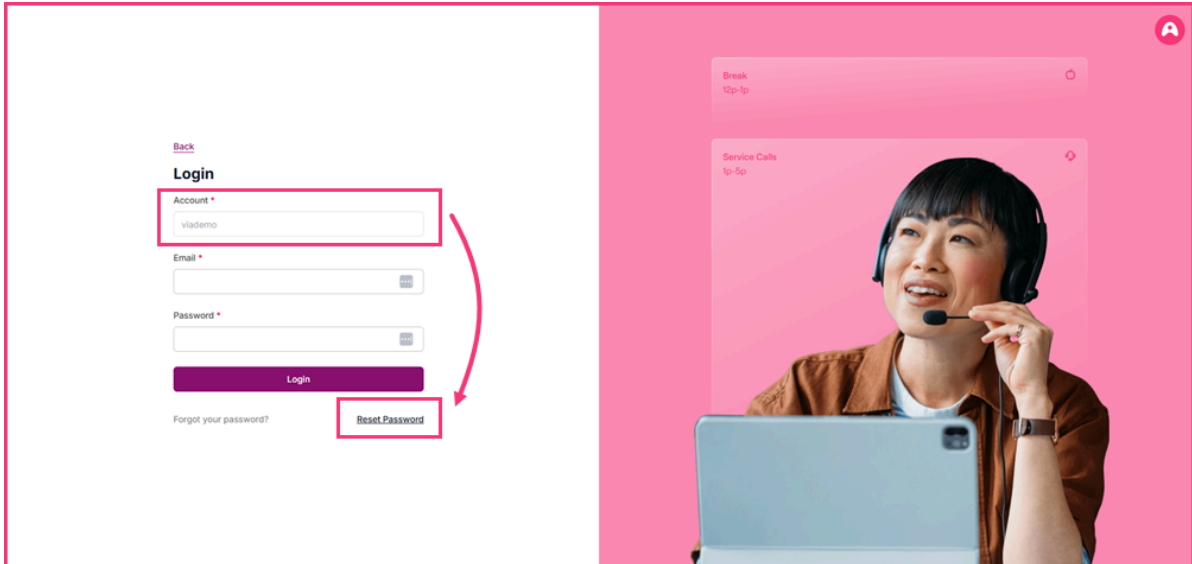


Figure 1-1

2. Type your email and click **Send Password Reset**.

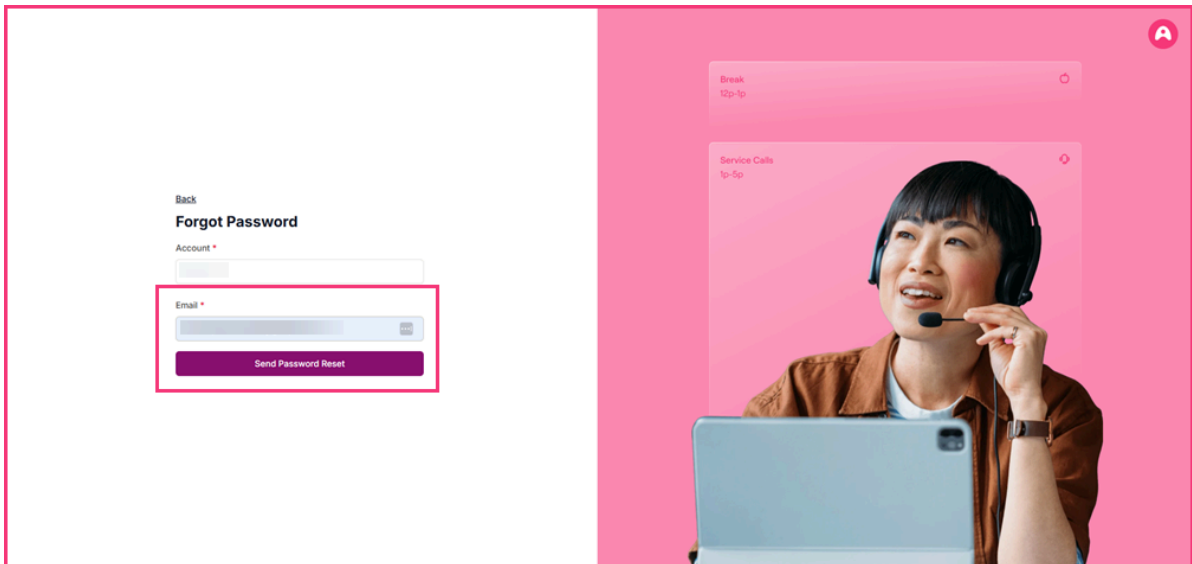


Figure 1-2

3. Open the "Your verification code" email, copy the **reset code** and return to the **Reset Password** page. Paste the code into the **Reset Code** field, type and confirm a new password and click **Reset Password**. Your password is now reset.

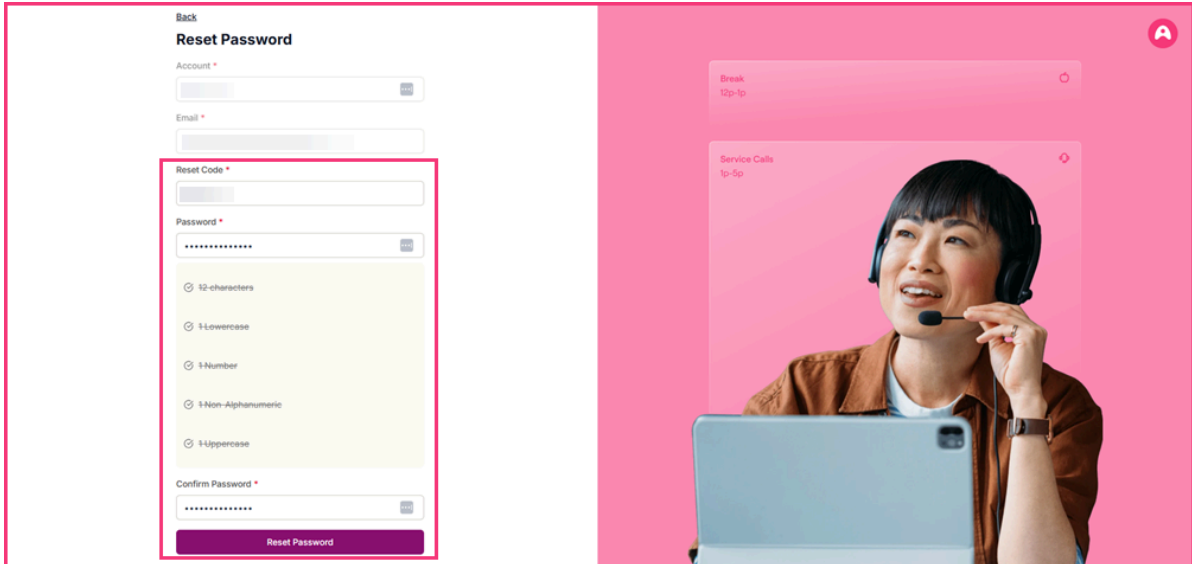


Figure 1-3

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▼ Request extra work hours using a shift container

1. Open the New Experience and log in.
3. From the left-hand navigation menu, expand **Scheduling** and select **My schedule**.

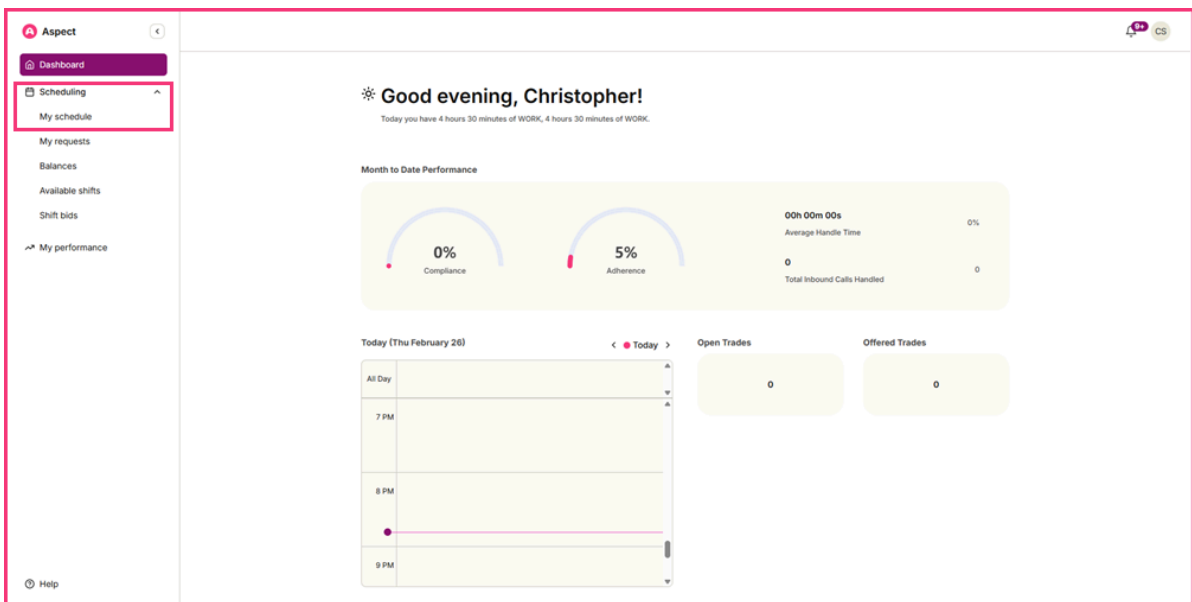


Figure 1-1

3. On the **My schedule** page, click **New Request**.

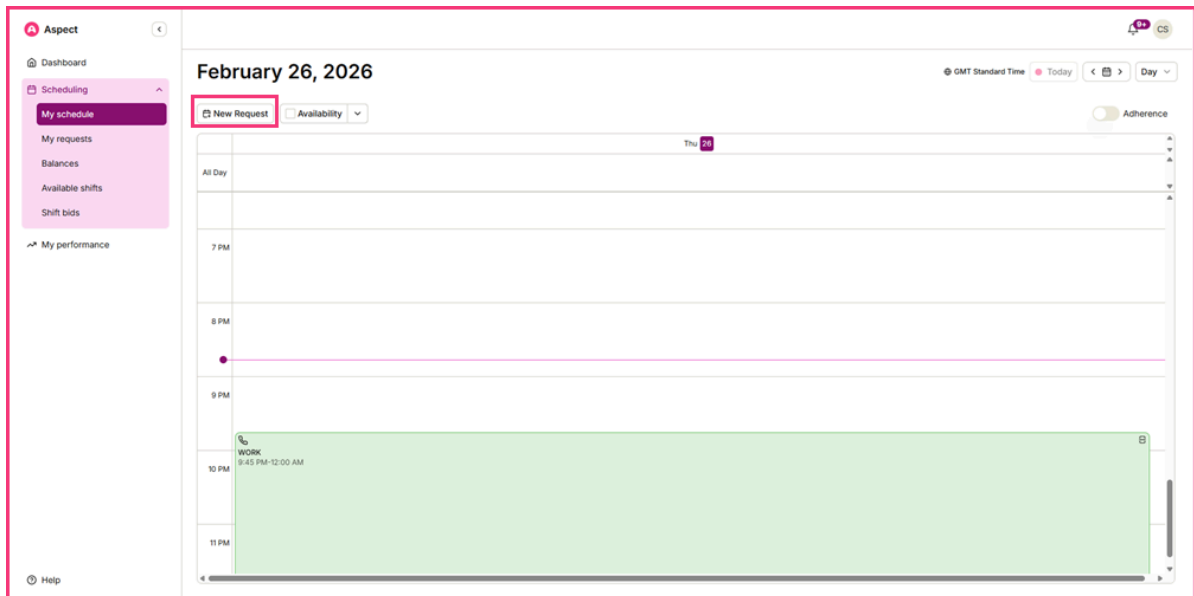


Figure 1-2

4. Click **Add Activity** to add **Change #1**.

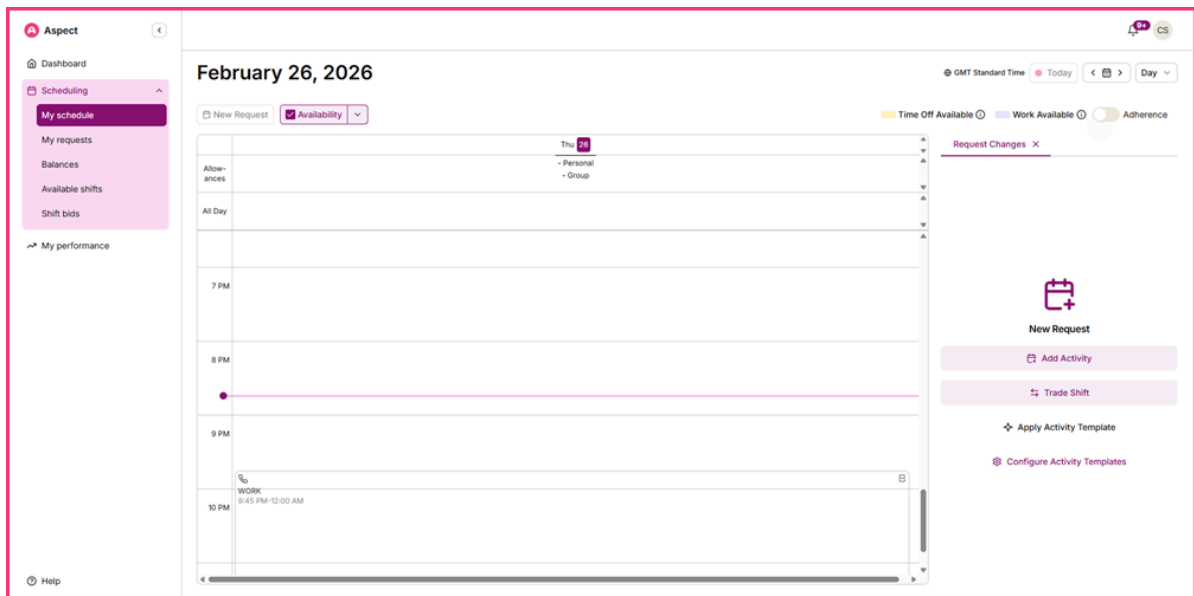


Figure 1-3

5. From the **Activity Type** drop-down menu, select **SHIFT (container)** or another option depending on how your company defines the activity.

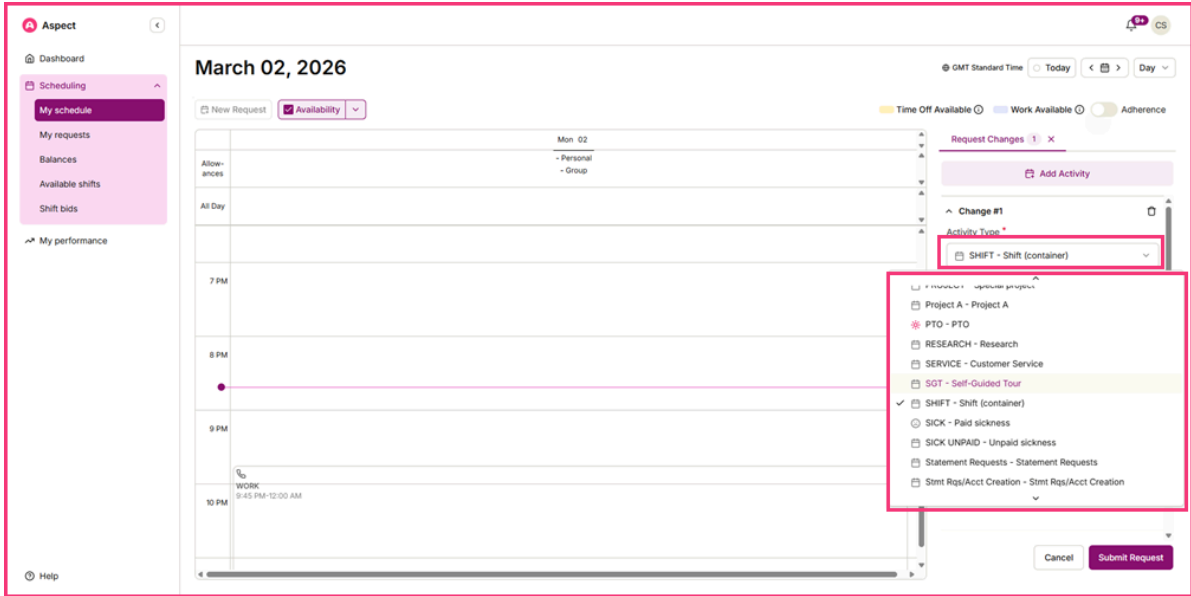


Figure 1-4

6. Select the day you want to add the extra hours, then select the **Start** and **End** times. The new **Shift Container** for **Change #1** will appear in the **Schedule** view.

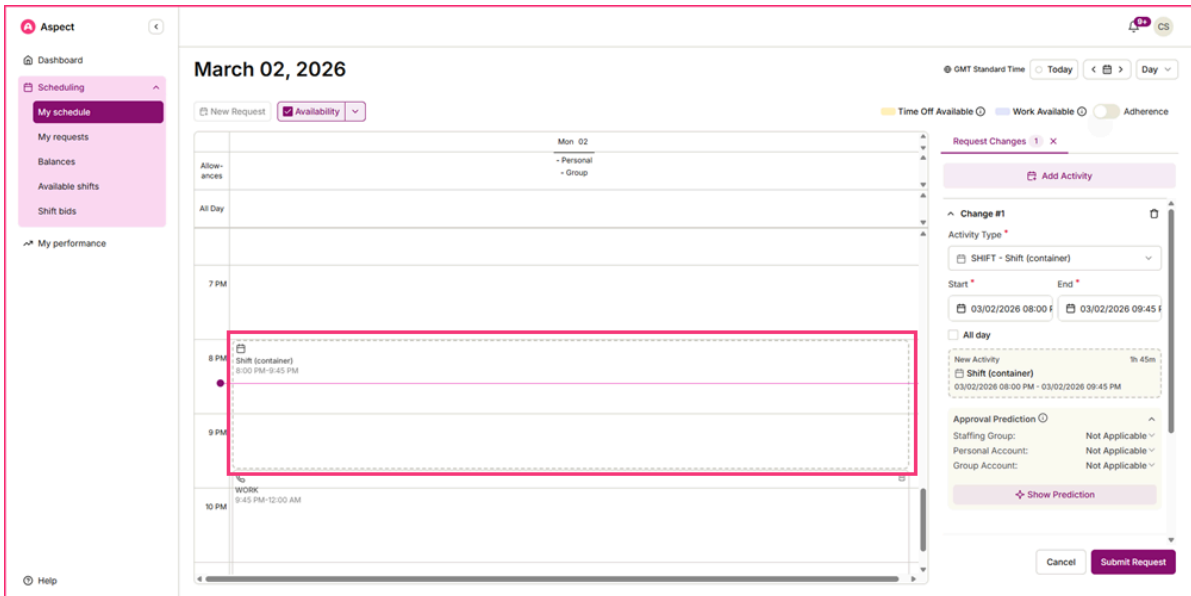


Figure 1-5

7. Click **Add Activity** to add **Change #2**.

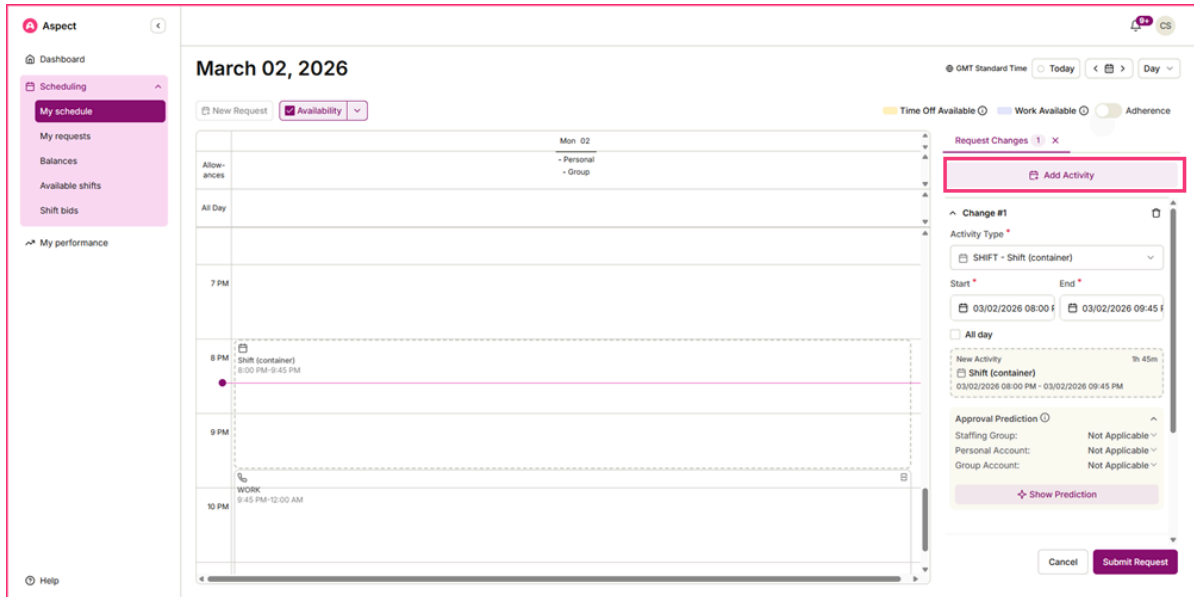



Figure 1-6

8. From the **Activity Type** drop-down menu, select **WORK** or another option depending on how your company defines the activity.
7. Select the same day you want to add the extra hours, then select the **Start** and **End** times for the Work shift. The new **Work Container** will appear in the **Schedule** view.

 The **WORK** container hours must not exceed the **SHIFT** container hours.

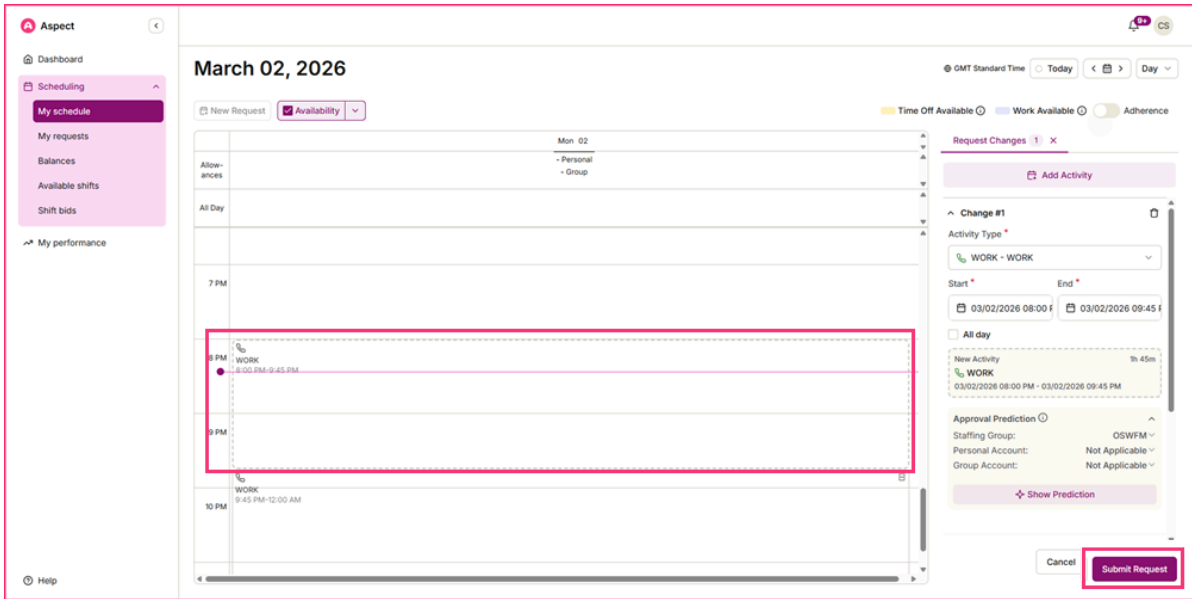


Figure 1-7

10. Click **Submit Request**. Including the **WORK** container within the **SHIFT** container will allow your request to be processed in WFM.

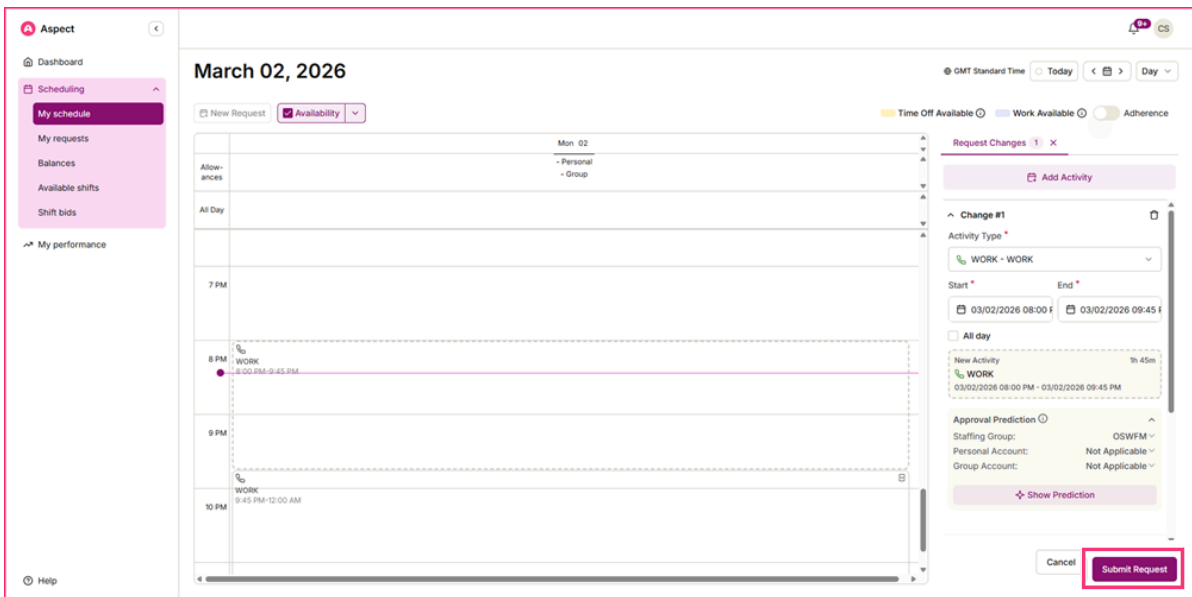


Figure 1-8

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Contact Support

▼ Contact Support

For any issues you are unable to resolve in the Troubleshooting section, please contact your Workforce Administrator with your account name and a description of your issue.