

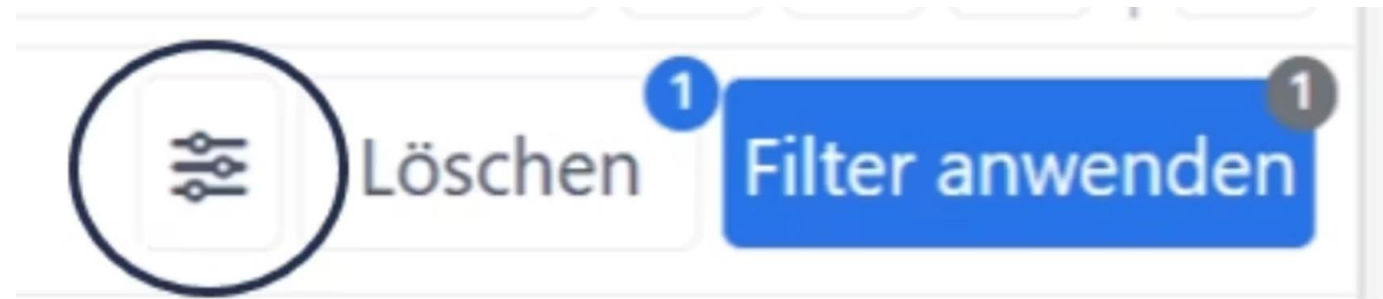
INSTRUCTIONS

WFM One - Toolbar instructions

New, customisable toolbar in operational resource planning. With this update, the toolbar has been comprehensively revised - for a clearer structure and more flexibility in customising the filter area.

Step 1: Open filter

Click on the **filter icon** in the top right-hand corner to open the filter area. The icon is always visible in the toolbar and provides quick access to all available filters.



-  The filter icon is located at the top right of the toolbar. One click opens the filter bar with all available options. The blue number on the icon shows how many filters are currently active.



Filter icon

The highlighted icon opens the configuration view for all filters in operational deployment planning.

Step 2: Configuration

After opening the filter icon, the dialogue **"Configure filters and positions"** appears. Here you can see all available filters in a clear list with the respective assignment options.

Quick filter toolbar

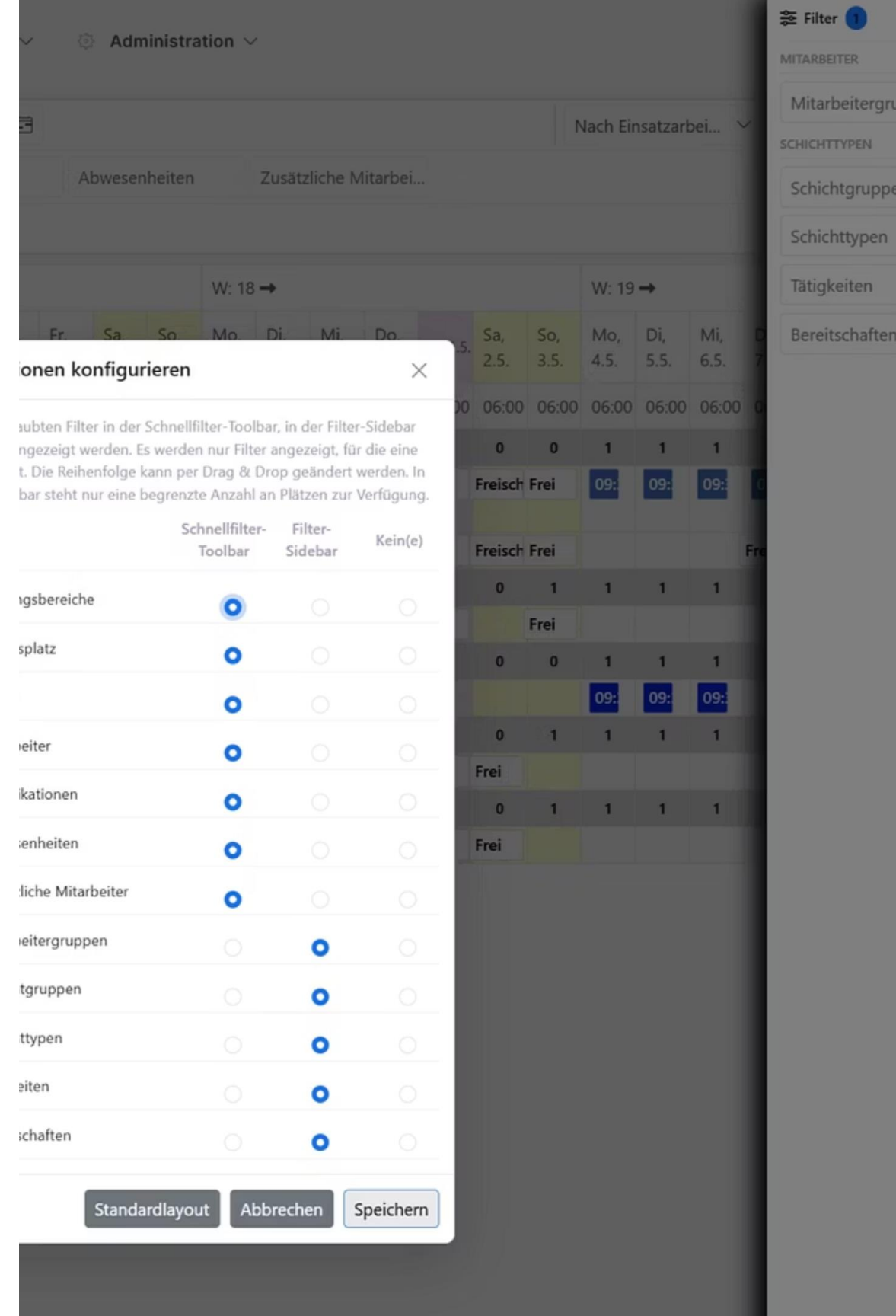
Filters are displayed directly in the top bar - for quick access.

Filter sidebar

Filters appear in the side configuration bar for detailed settings.

None

The filter is hidden and is not available for direct access.



Step 3 & 4: Set filter and save

Step 3: Set filters

Activate or deactivate filters and **drag & drop** them into the desired order. For each filter, select whether it should be displayed in the quick filter toolbar, the filter sidebar or not at all.

- Activate or deactivate filters
- Adjust the order using drag & drop
- Position: Quick filter toolbar, sidebar or hidden

Step 4: Save

Click on **"Save"** at the bottom right to save your configuration. Click on **"Standard layout"** to return to the original view at any time.

Filter und Positionen konfigurieren

Lege fest, welche erlaubten Filter in der Schnellfilter-Toolbar, in der Filter-Sidebar oder ausgeblendet angezeigt werden. Es werden nur Filter angezeigt, für die eine Berechtigung besteht. Die Reihenfolge kann per Drag & Drop geändert werden. In der Schnellfilter-Toolbar steht nur eine begrenzte Anzahl an Plätzen zur Verfügung.

Sortierung	Filter	Schnellfilter-Toolbar	Filter-Sidebar	Kein(e)
1	Planungsbereiche	☒	☐	☐
2	Arbeitsplatz	☒	☐	☐
3	Teams	☒	☐	☐
4	Mitarbeiter	☒	☐	☐
5	Sortierung Qualifikationen	☒	☐	☐
6	Abwesenheiten	☒	☐	☐
7	Zusätzliche Mitarbeiter	☒	☐	☐
8	Mitarbeitergruppen	☐	☒	☐
9	Schichttypen	☐	☒	☐
10	Tätigkeiten	☐	☒	☐
11	Bereitschaften	☐	☒	☐

Standardlayout

Abbrechen

Speichern

Use sidebar filters

The filter sidebar provides a detailed overview of all configured filters. Values can be specifically selected and combined here before they are applied to the view.

The screenshot shows a sidebar titled 'Filter' with a blue circle containing the number '1'. Below the title, there are two sections: 'MITARBEITER' and 'SCHICHTTYPEN'. Under 'MITARBEITER', there is a text input field containing 'Mitarbeitergruppen'. Under 'SCHICHTTYPEN', there is a text input field containing 'Schichttypen'. Below this, there is a dropdown menu that is open, showing a list of options: 'Alles auswählen', '24-Stundenpause', 'Flex', 'Free', 'Frei', 'Frühschicht', 'Mittelschicht', and 'Nachtschicht'. At the bottom of the sidebar, there are two buttons: 'Filter löschen' and 'Filter anwenden'.

How to use the sidebar

All filters that have been assigned in the sidebar configuration are displayed in the filter sidebar. Specific selection options are available for each filter.

→ Select filter

Click in the respective filter field and select one or more values from the drop-down list.

→ Apply filter

Click the "Apply filter" button to apply the selected settings to the current view.

→ Delete filter

Click on "Delete filter" to reset all active filters and restore the complete view.

New, customisable toolbar in operational resource planning

With this update, the toolbar in operational resource planning has been comprehensively revised. The aim was to structure the interface more clearly and give users more options for customising the filter area to suit their personal working methods.

The most important changes at a glance



Clearer structure

Clearer and more organised structure of the entire toolbar



Cleaner separation

Clean separation of main functions, quick filters and favourites



More flexibility

More flexibility in the display and use of filters



More targeted access

Frequently used filters can be brought to the foreground in a more targeted manner



Calmer interface

The toolbar looks calmer and tidier overall



Standard configuration

It is possible to return to the standard configuration at any time

More personalisation for users

A central component of the update is the extended configurability of the filter area. Users can now better customise the filter interface to their individual requirements. Important filters can be kept directly accessible, while less relevant elements move out of the immediate focus.

This means that the interface can be customised more closely to personal working style. This is a great advantage, especially for different roles, teams and working methods. Each user can organise their operational resource planning in a way that is most efficient for their own day-to-day work.



Individual customisation

Each user can organise their filter area according to their own priorities - regardless of role or team.



Focus on the essentials

Frequently used filters move to the foreground, less frequently used options take a back seat.



Role-orientated use

Different roles and teams benefit from an interface that is customised to their way of working.

Quick filter with clear and reliable logic

The quick filter bar now follows a fixed, comprehensible structure. This ensures that users can quickly orientate themselves and always find important control elements in the same position.

10

slots for quick filters

Up to 10 filters can be placed directly in the quick filter toolbar.

1

Space for "Delete filter"

Fixed space for the button to reset all active filters.

1

Space for "Apply filter"

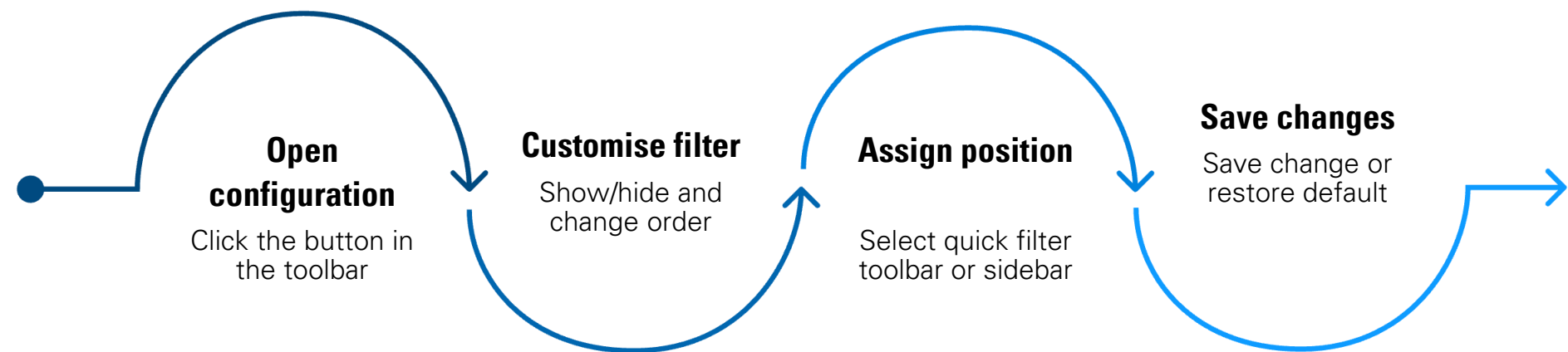
Fixed space for the button to apply the selected filter settings.

This ensures:

Reliable positions Control elements always remain in their known position, even with many active filters.	Faster orientation Consistent arrangement enables more intuitive operation without the need to search.
Better usability Clearer bar noticeably increases efficiency in daily use.	Calmer display The toolbar appears less cluttered and allows more focussed work.

How the configuration works

The toolbar is configured directly in the application via its own sidebar. The configuration view can be opened or closed via a button in the toolbar. Users can customise their filter display within this sidebar.



This allows each user to customise the toolbar to their own requirements and personal working style. A return to the standard configuration is possible at any time - personal settings can be used flexibly and completely reset if required.

Show or hide Show or hide filters as required, depending on their relevance to your everyday work.	Customise order Change the order of filters intuitively using drag-and-drop.
Move position Move important filters to a more visible position in the toolbar or sidebar.	Reduce focus Remove less relevant filters from the direct focus without removing them completely.

Advantages in day-to-day work

For end users, the update means one thing above all: greater efficiency and a much more pleasant working experience in operational scheduling. The revised toolbar reduces friction in everyday work and makes it possible to access the right information more quickly.



Faster orientation

Faster orientation in operational resource planning thanks to a clearly structured toolbar.



Less visual overload

Less visual clutter thanks to a tidier interface with a clear hierarchy.



Better customisation

Better customisation to personal working methods thanks to individually configurable filters.



Direct access

Direct access to individually important filters without detours through menus.



Clearer separation

Clearer separation between navigation, filters and favourites for greater clarity.



More flexibility

More flexibility with a secure return to the standard settings if required.

Outlook: Key-user-controllable standard configuration

In the next step, the standard configuration will also be configurable. In future, the standard will no longer just be predefined by the system, but will be made **controllable** by **key users**. This will allow team or department-specific requirements to be taken into account even better and sensible default settings to be maintained centrally.

Today: Preset on the system side

The standard configuration of the toolbar is currently permanently stored in the system and applies uniformly to all users. Individual customisations are only possible at a personal level.

In the future: Key user controllable

In the future, the standard will no longer just be predefined by the system, but will be made controllable by key users - for team- and area-specific requirements and sensible centralised maintenance of the default settings.

- Define team or area-specific default values
- Centrally maintain sensible default settings
- More control for key users without IT intervention

 This feature is currently being planned. Details on implementation and availability will be communicated in good time.