



Manage your Contact Center in Agent Setup

Agent groups

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- Administrator

Organize your agents into groups so they're easier to manage.

Related pages:

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Prerequisites

Before you can configure Agent Groups:

- You need to configure skills that will assign to the Agent Groups. If you haven't done so already, go to the skills tab and set up the skills you want to use.
- If you plan on creating Agent Groups by selecting specific agent accounts to the group, you first need to add the agent accounts. If you want to set up Virtual Agent Groups, it is not necessary to add the agent accounts first.

Configuring Agent Groups

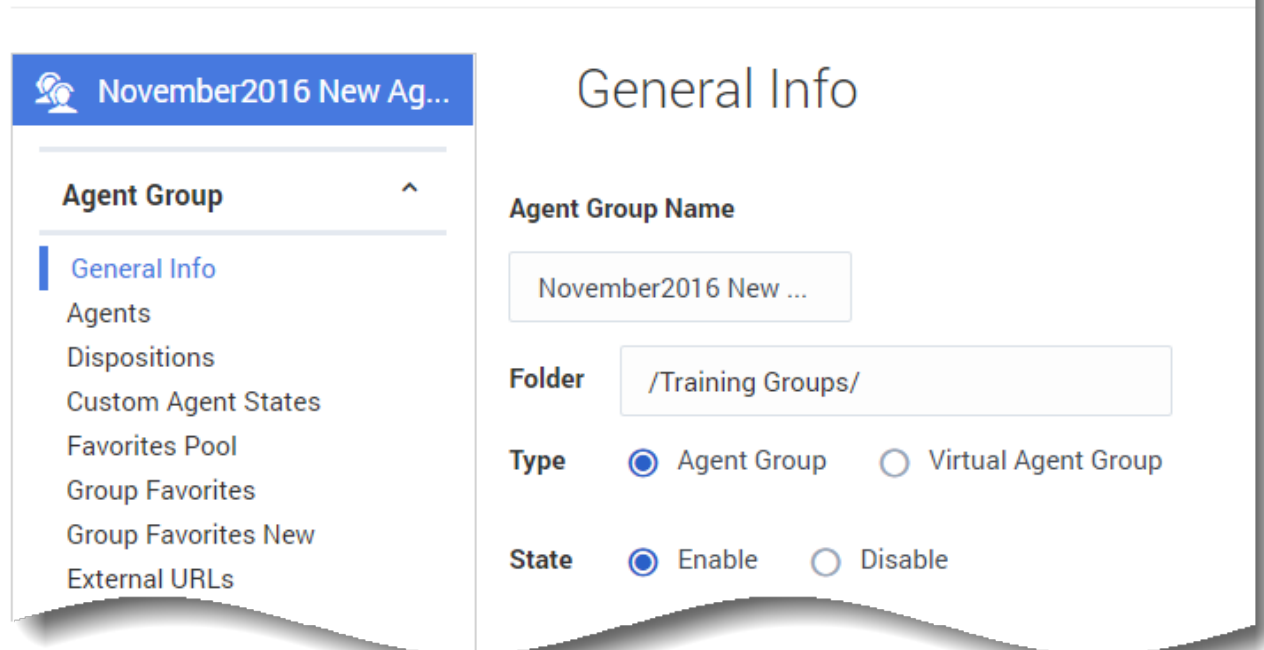
You have two options for creating Agent Groups:

- Create an **Agent Group** and then manually add agents to the group. For example, if you want to create an Agent Group for a group of new hires, you create the Agent Group, and then manually add each of the new hire's agent accounts to the group.
- Create a **Virtual Agent Group** to automatically group agents, according to their skills. You create an Agent Group object and define a script to identify the skills that you want the agents in the group to share. For example, you can create a virtual Agent Group for all agents that can speak Russian.

Both types of Agent Groups are configurable on the **Agent Groups** page. Use the following procedures to create and configure your Agent Groups:

Creating an Agent Group


New Agent Group



The screenshot shows the 'New Agent Group' window. The title bar reads 'November2016 New Ag...'. On the left, a sidebar under 'Agent Group' has 'General Info' selected. The main content area is titled 'General Info' and includes the following fields:

- Agent Group Name:** November2016 New ...
- Folder:** /Training Groups/
- Type:** Agent Group, Virtual Agent Group
- State:** Enable, Disable

In the **New Agent Group** window, type the name you want to assign to the Agent Group and click **Save**. In our example, the new Agent Group is a group of new hires, so let's name the Agent Group `November2016 New Agents`.

You can put the new Agent Group into a folder. This is useful for organizing your Agent Groups to make them easy to locate in the future. For example, you can place our new group into the **Training Groups** folder. When you select the **Folder** option, a drop-down list box is displayed where you can select a folder or click the add folder  icon to create a new folder.

By default the **State** of a new Agent Group is automatically enabled. By clicking **Disable** you can disable any Agent Group.

Adding agents to an Agent Group

The screenshot displays the 'All Agents' page in the Agent Setup interface. On the left, a navigation menu is visible with the 'Agents' tab highlighted and circled with a '1'. The main area is titled 'Agents' and features an 'Agent Group Supervisor' dropdown set to 'None'. Below this, the 'All Agents' section contains a search bar, a blue 'Add' button circled with a '3', and a list of agents. The first three agents have unchecked checkboxes, while the last agent, 'test agent 2 (22222)', has a checked checkbox circled with a '2'. To the right, the 'Agent Groups Agent' section has a search bar and a dashed box labeled 'Drag and drop agents here'. Below this box are five rows of agent information, each with a blue 'Add script' link.

When you create an Agent Group, you can go to the Agents tab and add agents to the group.

You can either drag the agent over to the Agent Groups Agent column, or you can click the box next to the agent's name in the All Agents list and then click Add. This automatically drops the agent into the Agent Groups Agent list.

Tip

On your Agent Groups list, you might see Agent Groups that have an **Add script** link in the script column. If you see this, it means that you or someone else created an Agent Group and no agents have been assigned to it. In other words, it's an empty group. You have the option to edit the group to manually add agents or click **Add script** to create a virtual Agent Group.

Creating a virtual Agent Group

New Agent Group

The screenshot shows the 'New Agent Group' configuration page. The left sidebar contains a navigation menu with the following items: Agent Group (expanded), General Info (selected), Agents, Dispositions, Custom Agent States, Favorites Pool, Group Favorites, Group Favorites New, External URLs, Agent Statistics, Contact Center Statistics, Case Data, and Toast Data. The main content area is titled 'General Info' and contains the following fields and options:

- Agent Group Name:** An empty text input field.
- Folder:** A text input field containing the character '/'. Below the field is a small downward arrow.
- Type:** Two radio buttons: 'Agent Group' (unselected) and 'Virtual Agent Group' (selected).
- Script:** An empty text input field. Below the field is the text: 'Specify expression in Virtual Group Script Language (VGSL) defining at least one skill in the format: Skill('SkillName')>SkillLevel'.
- State:** Two radio buttons: 'Enable' (selected) and 'Disable' (unselected).

You can create a virtual Agent Group by specifying a script when you add an Agent Group.

As opposed to a regular Agent Group, you can't manually add agents to a virtual Agent Group. Agents are automatically included in the group if the agent is assigned the skill that is specified in the script.

After you add the script, you will see a link in the **Script** column on the **Agent Groups** page. The script identifies the common skills shared by all agents that belong to the group. You can edit the script by double-clicking the script text and then updating the script in the dialog box that is displayed.

Viewing an agent's Agent Groups

The screenshot displays the 'Users' tab in the Agent Setup application. A table lists users, with 'Aiko Otsubo' selected. The right sidebar shows the user's profile, including a search field for 'Agent Groups' which is circled in red. The table below shows the user's assigned agent groups.

Name	Username	Roles	Skills
Aiko Otsubo	[redacted]	Agent	5 Skills

Agent Groups

- MMH_JA_Surface_DispositionList
- MMH_Japan_Consumer_AgentDesktop
- MMH_OKW_LiveMonitoring_AG
- 1 more...

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To view which agent groups an agent belongs to, from the **Users** tab, click either the agent's **Username**, **Roles**, or **Skills**. From the sidebar which opens on the right of the screen, scroll to the **Agent Groups** section. Here you can either expand the list to view all the agent's groups, or you can use the search field to search for a specific group name.

Editing an agent's Agent Groups

Edit User

The screenshot shows the 'Edit User' interface for user 'aiko tanaka'. The left-hand navigation menu is expanded to 'Agent Groups'. The main content area is titled 'Agent Group' and features a search bar, an 'Add' button, and a 'Remove' button. Below these is a table listing agent groups with checkboxes for selection.


<input type="checkbox"/>	Agent Group
<input checked="" type="checkbox"/>	NTC_Japan_Consumer_Office_Windows_DispositionList
<input type="checkbox"/>	NTC_Japan_Consumer_Windows_TechSupport_DispositionList
<input type="checkbox"/>	NTC_SAP_LiveMonitoring_AG
<input type="checkbox"/>	NTC_Japan_Consumer_SupervisorDesktop

To remove an agent from an Agent Group, from the **Users** tab, click the agent's **Name**. From the left-hand navigation menu, click **User > Agent Groups**. From here you can check the checkbox next to each Agent Group you wish to remove from the agent's list, then click **Remove**.

Note: Clicking **Remove** only removes the user from that Agent Group, it does not delete the Agent Group.

Configuring the desktop for an Agent Group

New Agent Group

 **AgentGroup1**

Agent Group ^

- General Info**
- Agents
- Dispositions
- Custom Agent States
- Favorites Pool
- Group Favorites
- Group Favorites New
- External URLs
- Agent Statistics
- Contact Center Statistics
- Case Data
- Toast Data
- Caller IDs

Desktop Options v

Digital Management v

Gplus Salesforce ^

- General
- Screen Pop
- Activity Log

General Info

Agent Group Name

Folder

Type Agent Group Virtual Agent Group

State Enable Disable

After you populate your Agent Group with agents, you can assign objects to the group. Under each of the following tabs, make your selections:

- Dispositions
- Custom agent states: Custom Agent States only displays existing **Not Ready** codes created under the Contact Center Settings.
- Group favorites: Group favorites are configured the same way as Global Favorites.
- External URLs
- Statistics options
- Case and toast data
- Caller ID
- Gplus Adapter for Salesforce options: Use the **Gplus Salesforce** tabs to configure the Gplus Adapter settings for the Agent Group.

Next Steps

After you have configured Agent Groups, you can proceed to configure:

- Business attribute overrides (Transactions)
- Templates