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Real-time Reporting with Pulse

Pulse Manage Agents

4/25/2024

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- Supervisor

Using Agent Widgets, perform agent management actions such as managing agent skills, or forcing agents to logout.

Related documentation:

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Starting with release 100.0.000.0012, Genesys Pulse offers a new Manage Agents tab, where Pulse Administrators and Pulse Managers can:

- View information about each agent.
- Change agent skills.
- Log out agents (end agent login sessions).

Name	Current Status	Time in State	Reason Code	User ID	Skills
[-] GAP Agent					
[+] Richard Anderson	Outbound Call	7:57:06			Selling (S), Sales (S)
[+] Priscilla Anderson	Outbound Call	3:24:00			Selling (S)
[+] John Doe	Incoming Call	7:18:00			Sales (S)
[+] James Smith	After Call Work	2:57:06			Selling (S), Sales (S)

The Manage Agents tab

Pulse displays the following fields for each agent, as shown in the figure **The Manage Agents tab**:

- Agent Group (Pulse displays Agent Group only if the agent widget was created "By Group"; otherwise it displays "N/A")
- Agent's Name
- Current Status
- Time in State
- Reason Code
- User ID
- Skills

Important

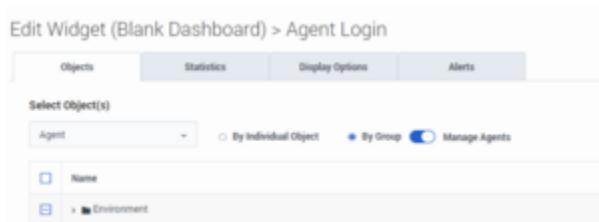
Pulse collects the data in these fields only if the Agent Management feature is enabled. Pulse also collects data for the following hidden fields: **Agent DBID**, **Switch DBID**, **Agent DN**, **Tenant ID**, and **Employee ID**.

Video: Manage Agents

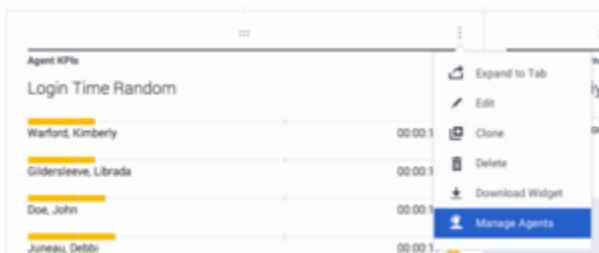
[Link to video](#)

Enable the Manage Agents tab

Manage Agents features are not enabled by default. Before you can use these features, you must complete the following steps to enable them:



Enable Manage Agents



Open the Manage Agents tab

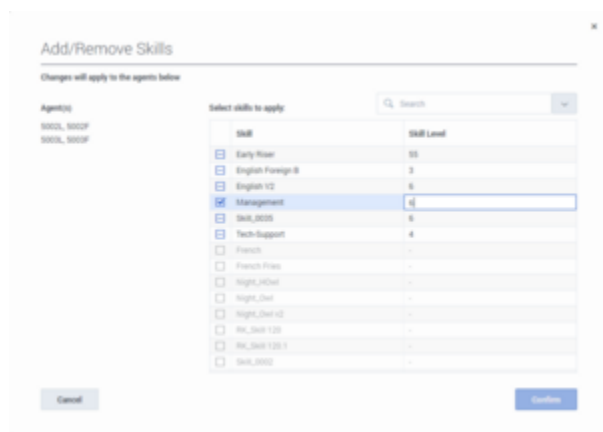
1. Edit the agent widget, and enable **Manage Agents**, as shown in the figure **Enable Manage Agents**.
2. On the **More** menu (the three vertical dots gadget) of the widget, click the **Manage Agents** link, and open the **Manage Agents** tab as shown in the figure **Open the Manage Agents tab**.
You can now manage agents.

Tip

- Genesys Pulse starts collecting the additional stats once the Management Agents feature is enabled. This can take several minutes, depending on the number of agents in the widget.
- Genesys Pulse stops collecting the additional stats once the Management Agents feature is disabled.

Change skills

From the **Manage Agents** tab, you can change skills of the selected agents.



The Add/remove skills window

To modify agents skills:

1. Open the **Manage Agents** tab.
2. Select one or more agents.
3. Click **Change Skills**, and optionally add new skills, change skill levels, or remove existing skills:
The **Add/Remove Skills** window shows selected agents and their current skills, as shown in the figure **The Add/remove skills window**:
 - For a given skill, if all selected agents have the same skill level, the corresponding skill level is displayed next to the skill.
 - For a given skill, if not all selected agents have the same skill level, the text **Multiple values** is displayed next to the skill.
 - For a given skill, if none of the selected agents have the skill, the skill is displayed as disabled (grayed out) and the skill level value is displayed as -.
 - Skills are ordered alphabetically by default; all the selected or partially selected skills are grouped before the non-selected skills.
 - You can add new skills, change the skills levels, or remove existing skills.

- If you have selected a skill (or partially selected a skill), click on a skill level or perform any edit action (press enter, backspace, delete, or any number) of the focused skill level to display the skill level as editable with a cursor.
- When you select the checkbox, the skill level becomes editable with a cursor, automatically.
- To stop skill level editing, press **Enter** or move focus away from the skill level cell.

Tip

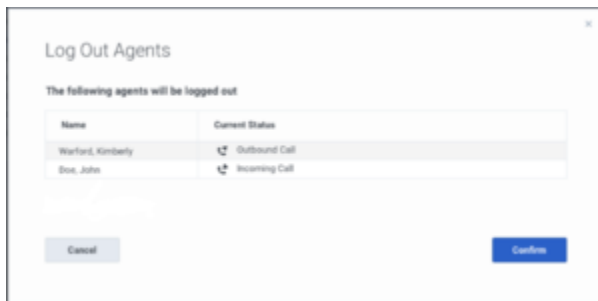
To confirm changes, Genesys Pulse users must have the Write (Change/Update) permission on the Person object (for all agents to be changed) in the Configuration Server.

4. Click **Confirm**.
The **Manage Agents** tab shows the modified skills. Depending on the refresh rate of the widget, it can take some time for the changes to appear.

End an agent login session

From the **Manage Agents** tab, you can end an agent login session.

To end an agent login session:



The Log Out Agents window

1. Open the **Manage Agents** tab.
2. Select one or more agents.
3. Click **Log Out**.
4. The **Log Out Agents** window appears, as shown in the figure **The Log Out Agents window**, which lists the selected agents and their current statuses.
The **Log Out** action applies only to logged-in agents. If you select multiple agents, some of whom are logged in and some of whom are logged out, the **Log Out Agents** window lists only the agents who are logged in.
5. Click **Confirm**.
The **Manage Agents** tab displays updated agent statuses.