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Workforce Management Web for Supervisors (Classic) Help

Creating Activity Sets and Groups

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- Supervisor

Use Activity Sets to facilitate multi-skilled scheduling, and Activity Groups to facilitate contact center performance monitoring and reporting.

Related documentation:

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Creating and deleting activity sets

Group activities from the same business unit into activity sets to enable data aggregation that facilitates contact center performance monitoring and reporting.

At the top of the **Activities** pane, click **Activity Sets** and configure activity sets for a selected site.

Tip

You must create activities before you can configure activity sets.

When using activity sets, be aware of the following:

- Activity sets are separately configured for each site. You cannot configure activity sets for business units.
- An activity in an activity set can be incorporated in a multi-skilled schedule only with other activities from the same set.
- An activity cannot belong to more than one activity set.
- An activity belonging to an activity set can only be scheduled using the activity set.
- To configure an activity so that it will never be incorporated in a multi-skilled schedule, create an activity set containing only that one activity.
- The activity set constraint is incompatible with the maximum seats constraint. If there is a conflict, Scheduler gives priority to the activity set constraint.



Agents assigned to an activity set perform the selected activities on a multi-skilled basis. These agents cannot be assigned to any other activities during the minimum time period specified for the activity set.

Important

To accommodate those times when some agents cannot be assigned to work on an activity set, Genesys recommends that you always keep an activity that is not a part of an activity set available for agents to perform during the activity set open hours. If the activity set becomes overstaffed before all agents are scheduled, Scheduler tries to create activity set work for them. However, if an agent's unassigned period is shorter than the minimum activity set period, Scheduler has to assign the agent an extended period with no activities at all (forced break) because no activity is available for him or her to work on.

Creating activity sets


To create an activity set:

1. In the **Objects** pane, select the site, for which you want to create the activity set.
2. At the bottom of the **Activities** pane, click **Activity Sets**.
3. In this pane, click **New Activity Set**  .
The Activity Set Properties pane opens.
4. Configure the following settings, as described:
 - **Name**—Enter a name for the activity set. The name must be unique within the site.
 - **Short Name**—Enter a three-letter short name for the activity set.
 - **Minimum Duration**—Enter a value for the minimum length of time that an agent can work on the activities within this activity set.
 - **Strict**—Check this box if you do not want meals, part-day exceptions, or part-day time offs to be scheduled during the activity set period. (Breaks can be scheduled during the activity set.) Leave this box unchecked, if breaks, meals, part-day exceptions, and part-day time offs can interrupt this activity set. (The only constraint is the minimum duration.)
5. Click **Save Now**  .
6. Continue with the configuration of the activity set by adding activities to it. See [\[\[PEC-WFM/Current/Supervisor/ActToActSets\]\]](#).



Adding activities to activity sets

After creating an activity set, add the activities, by opening the **Activities** pane.

To add activities to an activity set:


1. In the **Activities** pane, click **Assign regular activities**  .
The Available Activities pane opens.
2. From the **Activities** list, select the activities that you want to add to this set.

To quickly find an activity in the list, enter the name of the activity in the Search field. You will notice that the activities that are already assigned to an activity set, display the activity set name in a separate column. These same activities are still available to select for the new activities set.

3. Click **Apply** .
4. In the **Associated Activities** pane, click **Save Now** .
The selected activities are added to the list of activities in the Activity Sets pane.

Deleting activity sets

To delete an activity set:

1. In the **Activity Sets** pane, select the set that you want to delete.
2. Click **Delete** .



Creating and deleting activity groups

Group activities within a business unit to enable data aggregation that facilitates contact center performance monitoring and reporting.

You can create activity groups, assign activities to them using a filter, copy, and delete them.

Creating activity groups




To create an activity group:

1. In the **Objects** pane, select the business unit, for which you want to create the Activity Group.
2. In the **Activities** pane, select **New Activity Group** .
The Activity Group Properties pane opens.
3. In the **Name** field, enter a unique name for the group.
4. Click **Save Now** .
The new activity group appears in the Activities pane.

Assigning activities to activity groups

To assign activities to an activity group:



1. In the **Activities** pane, select the group, to which you want to assign activities.
2. At the top of the **Activity Group Properties** pane, click **Activities**.

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3. When the **Associated Activities** pane opens, click **Assign regular activities** . **The Activities pane opens.**
 4. Select the activities you want to associate with this **Activity Group**. **To quickly find an activity, type the activity name into the Search field. Only activities for the selected business unit are available. Activities for other business units do not appear.**
 5. When you have selected all activities, click **Apply** .
 6. In the **Associated Activities** pane, click **Save Now** .

When you assign activities to an activity group, you can use a filter to select only those sites and multi-site activities to which you want these groups and activities to apply.


Using filters to assign activities

To use a filter when assigning activities:

1. In the **Activities** pane, click **Filter** . **The Filter pane opens.**
2. In the Sites list, do one of the following:
 - Remove the check mark in the **All** check box and select the sites, to which you want to assign these groups and activities.
 - Remove the check mark in the **All** check box and check **No Filtering by Sites**. (If this box is checked, the activities and groups apply to all sites in the list.)
3. In the **Multi-Site Activities** section, do one of the following:
 - Remove the check mark in the **All** check box and select the multi-site activities, to which you want to assign these groups and activities.
 - Remove the check mark in the **All** check box and check **No Filtering by Activities**. (If this box is checked, the activities and groups apply to all multi-site activities in the list.)
4. Click **Apply** .

Copying activity groups

To copy an activity group:

1. In the **Activities** pane, select the Activity Group you want to copy.
2. Click **Copy** . **The Copy Activity Group pane opens.**
3. In the **Name** field, rename the Activity Group, if necessary. (The name must be unique within the business unit.)
4. In the **Associate Copied Activity Group With The Following Business Unit** section, select the business unit with which you want this Activity Group to be associated.


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5. Click **Save Now**  .

Tip

When you copy an activity group and add it to the same business unit, all activities that were associated with the copied activity group are associated with the duplicated activity group.

Deleting activity groups

To delete an activity group:

1. In the **Activities** pane, select the **Activity Group** you want to delete.
2. Click **Delete**  .
3. When the Confirmation dialog opens, click **Yes** to delete or **No** to cancel the action.