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Workforce Management Web for Supervisors (Classic) Help

Activities

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- Supervisor

This topic provides links to procedures for configuring activities.

Related documentation:

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Activities are work items that Workforce Management tracks and manages. For example, answering inbound calls, responding to email, completing after-call work, performing scheduled callbacks, and participating in chat sessions.

You must configure activities separately for each site or business unit. Business units require multisite activities, which combine activities at some or all of the sites in a business unit. If you select a site in the **Objects** pane, the activities configured for that location appear in the **Activities** pane. If you select a business unit, the multisite activities configured for that location appear in the **Activities** pane.

Important

To configure objects and change settings in the **Activities** and **Multi-Site Activities** views, you must have the appropriate role privileges. See Configuration Role Privileges.

In the **Activities** pane, click an activity to view its properties and edit them.

- For instructions about how to view or create new activities or multisite activities and configure staffing properties and open hours, see [Creating and deleting activities](#).
- To define regular activities, see [Configuring skills for activities](#) and [Associating agents with activities](#).
- To configure multisite activities, see [Assigning activities to multi-site activities](#), and [Configuring skills for multi-site activities](#).
- To view, add, edit, or delete activity sets, or configure new or existing activity sets, see [Creating activity sets](#) and [Adding activities to activity sets](#).
- To view, add, edit, or delete activity groups, or configure new or existing activity groups, see [Grouping multiple activities](#).
- To configure activity policies to establish rules and guidelines that determine how, when, and in which activities the agent can engage, see [Activity properties](#).
- To associate Stat Server statistics with activities and multisite activities for use in monitoring interaction and service levels, see [Statistics configuration for activities](#) and [Configuring statistics for multi-site activities](#).

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- To set default target service levels or staffing requirements for different types of activities, see Default forecasting objectives.

Activity properties

When adding activities, set the activity properties to establish rules and guidelines that determine how, when, and in which activities the agent can engage.

Select the site to which you want to add an activity and then, set the activity policies in the **Activity Properties** pane.

See also, Multi-site activity properties.

In the **Activity Properties** section:

- **Name**—Enter a name for this activity. The name must be unique within the site.
- **Short Name**—Enter a short name for this activity. The short name can be up to three characters and identifies the activity in Schedule displays. The short name does not need to be unique.
- **Type**—Select one of the following three options:
 - **Immediate Work**—CTI activities that use Workforce Management service objectives for Forecasting and Adherence.
 - **Deferred Work**—Backlog activities, such as email, that use special forecasting calculations.
 - **Fixed-Staff Work**—Non-CTI activities that do not use Workforce Management service objectives.
- **Activity Set**—If this activity becomes part of an Activity Set, this field is automatically populated with the name of the activity set.
- **Maximum Simultaneous Users**—Enter a value that represents the maximum number of agents or staff that can work on this activity simultaneously.
- **Minimum Staffing Level**—Enter a value for the minimum percentage of agents or the minimum number of agents required for this activity and select the appropriate radio button: **Percent** or **Agents**.

In the **Hours of Operation** section:



- **Monday to Sunday fields**—Enter start and end times.
- **Next Day check box**—Check or uncheck for each day, as required. Check the check box for those days on which the hours of operation extend into the next day.
- **Closed check box**—Check or uncheck for each day, as required. Check the check box for those days when the contact center is closed. When checked, the start and end times for that day are disabled and cannot be modified. Leave the check box unchecked, if the contact center is open on that day.
- **Copy/Paste icons**—Click to copy and paste start and end times, and next day settings from one day to another day.

Creating and deleting activities

You can add an activity or a multi-site activity by creating a new one or by copying an existing one. You can also delete existing activities.

Creating activities



To create an activity:

1. In the **Objects** pane, select the site to which you want to add the new activity.
2. When the **Activities** pane opens, select **New Activity** .
The Activity Properties pane opens with the default name New Activity (number>).
3. In the **Activity Properties** and **Hours of Operation** sections, populate the fields as described in Activity properties.
4. Click **Save Now** .
5. Configure the activity, as explained in these topics:
 - Adding activities to activity sets
 - Configuring skills for activities
 - Associating agents with activities.

See also Statistics configuration for activities.


Creating multi-site activities

To create a multi-site activity:

1. On the **Objects** pane, select the business unit, to which you want to add the new multi-site activity.
2. Select **New Multi-Site Activity** .
The Multi-Site Activities Properties pane opens.
3. In the **Multi-Site Activity Properties** and **Hours of Operation** sections, populate the fields as described in Multi-site activity properties.
4. Click **Save Now** .
See also, Multi-Site Activities and Configuring statistics for multi-site activities.

Using copy to create activities and multi-site activities

To create a new activity or multi-site activity by copying an existing one:

1. In the **Activities** pane, select an activity or multi-site activity.
2. Select **Copy** .
The Activity Assignment pane opens.
3. In the **Name** field, rename the activity, if necessary. (The name must be unique with the site or


business unit [BU].)

4. In the **Associate Copied Activity With The Following Site (for multi-site, BU)** section, select the site (or BU) with which you want this activity to be associated.

5. Click **Save Now**  .

Deleting activities and multi-site activities

To delete an activity or multi-site activity:

1. Select the activity in the **Activities** pane.
2. Click **Delete**  .
3. When the **Confirmation** dialog opens, click **Yes** to delete or **No** to cancel the action.

Configuring skills for activities

Use this information in this topic to associate and disassociate skills and activities.

Tip

Skills are associated with agents in Genesys Administrator and with activities in Workforce Management (WFM). WFM skills are identical to Genesys Administrator **Skills** objects and are available in WFM after synchronization with Genesys Administrator.

Use the **Skills** pane to add, or delete skills that are associated with an activity.

Note the following information about skills:

- If you add a skill to an activity, only agents with that skill are scheduled for that activity.
- If you associate multiple skills with an activity, agents must have all of the skills to work on the activity.
- An activity may include more than one skill, or it may represent a particular skill level.



User access to skills

Only the skills that the current user is authorized to access in Genesys Administrator are visible.

If a user's security access has changed so that he or she can no longer access certain skills, those skills are still visible; but the user whose access was changed cannot add, delete, or modify them.



Adding skills to activities

To add a skill to an activity:

1. In the **Activities** pane, select the activity, to which you want to add skills.
2. At the top of the **Activities Properties** pane, click **Skills**.
3. When the **Skills** pane opens, click **Add Skills to an Activity**  .
4. In the **Skills** pane, assign the minimum and maximum skill levels.
 - **Skill Minimum Level**—A minimum skill level value required for an agent with this skill to perform this activity. Define whatever range is appropriate for each skill, such as 1 to 10 or 1 to 100. The range should be consistent with the range used in Genesys Administrator.
 - **Skill Maximum Level**—A maximum skill-level value required for an agent with this skill to perform this activity.
5. In the list of skills, select those that you want to associate with this activity.
To quickly find a skill, you can enter search criteria into the Search field (for example, the skill name).
You must define skills in Genesys Administrator before they appear in this list.
6. When you have finished selecting skills, click **Apply**  .

Deleting skills from activities

To delete a skill:

1. In the **Skills** pane, select the skill you want to delete.
To quickly find a skill, you can enter search criteria into the Search field (for example, the skill name).
2. Click **Delete**  .
3. When you have finished deleting skills, click **Save Now**  .

Associating agents with activities

Associate agents with activities or work items that you created for a site or business unit.

Use the **Agents** pane within the **Activities** view to associate agents with activities. To open this pane, select **Agents** at the top of the **Activity Properties** pane.

Agents can work on activities under two conditions:



1. They have the proper skill set. Their skills must match the skills required for the activity.
2. They are eligible for activity assignments. If the effective date is before the current date, these assignments override the agent's eligibility to work on the activity accordingly to the skill set.

To adjust which agents are associated with an activity, change the skill settings for either:

- The agent, by using the **Agent Information** section. See the Agent Activities view.
- The activity, by using the **Skills** pane in **Configuration > Activities** module. See Configuring skills for activities.

Associating agents with activities

To associate an agent with an activity:



1. In the **Activities** pane, select the activity, with which you want to associate agents.
2. At the top of the **Activity Properties** pane, click **Agents**.
3. The **Agents Associated with The Activity** pane opens.
4. Click **Associate agents with the activity** . **A list of Available Agents opens.**
5. In the **Effective Date** field, enter (or click within the field to select from a calendar) the date that you want the association to begin.
6. In the Status field, use the drop-down list to select one of four options: **Primary**, **Secondary**, **Auto**, or **Disabled**.
7. In the Available Agents list, select the agents you want to associate with this activity.
8. When you have selected all agents, click **Apply** .

Tip

To disassociate (or remove) an agent from an activity, go to **Configuration > Agents > Activities** view.

Finding agents in lists

There are three ways to quickly and easily find agents when there is a long list of available agents:

1. Enter the agents name into the **Search** field and select one of the two **Search by:** filters (**First Name** or **Last Name** radio button).
2. **Sort**  agents by **First Name**, **Last Name**, or **Team**.
3. **Filter**  agents by activities, multi-site activities, or contracts.

In each of the three Filter panes, you can Sort  **the list in ascending or descending order.**

To remove an item from the list, click Remove .