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Workforce Management Web for Supervisors (Classic) Help

Agents

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- Supervisor

View and configure agent properties, and assign Activities, Contracts, or Rotating Patterns to agents.

Related documentation:

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This module consists of the **Agents** and **Properties** panes, described below.

The **Agents** pane displays a list of agents in the selected site within the enterprise, with the agent's first name, last name, ID number, and hire date. Use the **Search** function to generate quick and accurate results (even when using partial search criteria).

Agent properties

The **Properties** pane enables you to configure various settings in five categories. Click to open the following tabs:

- Properties
- Activities
- Contracts and Rotating Patterns
- Time Off
- Time-Off Bonuses

Click **Properties** at the top of the pane to see the following information:

- **First name:**—The first name of the agent.
- **Last name:**—The last name of the agent.
- **Employee ID:**—The agent's employee identification number.
- **Site**—The agent's site.
- **Team**—The agent's team.
- **Email:**—The email address that is used to notify agents of schedule change events, schedule trade request status changes, and time-off request status changes.
- **Hire Date:**—The hire date that is set as the date of import when new agents are imported from Genesys Administrator. You can change the date to the agent's actual hire date. The Scheduler does not include agents whose hire date is set as a date in the future.
- **Termination Date:**—The date on which the agent was terminated. To set a termination date for an

agent, select the check box and enter a date for termination.

WFM maintains agent properties, even after agents are deleted from Genesys Administrator. However, you can choose to have deleted agents hidden from view in WFM by changing the CFG_SHOW_TERMINATED_AGENTS setting. Click About > Setting... (near the Log out button) to open the dialog.

- **Hourly Wage:**—Optional: A parameter that specifies the agent's hourly wage and that is used in budgeting. You can configure this option so that it appears only to users with appropriate security rights in the **Roles** module in WFM Web for Supervisors.
- **Rank:**—Optional: A setting that can be used as the criteria for allocating the agent's preferences during scheduling. The value for an agent's ranking can contain up to 5 digits. If you do not use ranking, leave this parameter value at 0 (which is the lower rank value). The rank settings affect Workforce Management only; It is not related to the agent's ranking that is configured in Configuration Manager.
- **Comments:**—Any comments that are related to the agent.

-  **Save Now**—To save any changes, click this icon at the top of the pane. If you do not have at least one of the Edit privileges in the **Agents** view, this icon is disabled and you cannot save changes.
-  **Help**—To view a Help topic about the **Properties** pane, click this icon at the top of the pane.

Moving agents to other teams or sites

To move an agent to another team or site:

1. In the **Agent Properties** pane, select **Move Agent** .
2. In the **Move Agent agent_name> To Following Team** pane, do one of the following:
 - In the list of teams/sites, select the team or site.
 - Enter the team or site name in the **Search** field to quickly find it, and then select it.
3. Click **Apply** .

Agent activities

To view the selected agent's activities, select **Activities** at the top of the pane. Then, use the controls in the top-right corner of this pane to complete the following tasks:

-  **Add Activity**—Click to add an activity for the selected agent.
-  **Delete Activity**—Click to delete an activity for the selected agent.
-  **Save Now**—Click to save any changes.



- **Help**—Click to view a Help topic about the **Properties** pane.

The **Activities** pane displays a list of activities that are assigned to an agent and contains detailed information in two sections Activities and Agent's skills) about the activities in the following columns:

Activities

- **Name**—The name of the activity that is assigned to the agent (sortable column).
- **Site**—The name of the site at which the agent is configured; It might be a site, other than the one in which the agent currently appears if the agent was moved to another site.
- **Status**—The agent's status, which determines the activities on which the agent is eligible to work. For example:
 - **Primary**—Works as if the agent became eligible for an activity, based on his/her primary skills.
 - **Secondary**—Works as if the agent became eligible for an activity, based on his/her secondary skills.
 - **Disabled**—Specifies explicitly that the agent cannot work on this particular activity, even if his/her skills allow it.
 - **Auto**—Cancels any previous explicit assignment and returns to determining the activity eligibility, based on the agent's skills.
- **Effective Date**—The start date on which the agent becomes eligible to work on the activity with the specified status. The explicit agent activity assignment does not have an end date. One assignment must be replaced by another one. This assignment has daily granularity and uses shift days, rather than calendar days.
You cannot specify a time of day that the effective date for activities will begin.
- **Skilled**—Displays the agents eligibility to work on the assigned activity, based on the skill set. This value can be **Primary**, **Secondary**, or **N/A** (if the skill is disabled for agent or is absent altogether). This value is overridden by the value in the **Status** column.



In the **Activities** pane, click **Add Activity** to open another pane, in which you can add an effective date for the Activity, set the status, and select the **Activity** to assign from a list of available Activities.

Agent's skills

This section displays a list of the selected agent's current skills in three columns, as shown below.

To change the skill **Status** in this pane, click the drop-down list to select **Disabled**, **Primary**, or **Secondary**.

- **Skill**—The name of the selected agent's skill.
- **Level**—The selected agent's skill level.
- **Status**—The selected agent's current status.

Adding activities

To add an activity to the selected agent:

1. Double-click the **Effective Date** field to change the date or keep the current date (default).
2. In the **Status** drop-down list, select **Primary**, **Secondary**, **Auto**, or **Disabled**.
3. In the **Activities to be Assigned to Agents** list, click an activity to assign to highlight it.
4. Click **Assign Activity** . The activity displays in the **Activities** pane.
5. Click **X** to close the assignment pane.

Deleting activities

To delete an activity:

1. Select an activity. 
2. Click **Delete Activity** .
3. When the **Confirmation** dialog opens, click **Yes** to proceed or **No** to cancel the deletion.
If you select Yes, you cannot undo the deletion of the activity.