Workforce Management Web for Supervisors (Classic) Help

Filtering Agents and Teams

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  - Supervisor

In the **Configuration** > **Shared Transport** view filter a list of agents or teams.

agents and teams.

Related documentation:
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When you have large numbers of agents and teams, you might want to use the **Filter** (found at the top of the Shared Transport and Meetings panes) to easily and conveniently group them. For example, you might want to filter agents associated with a certain team or site, or to filter teams associated with a certain site.

After you have created one or more filters they appear as bullets above the Shared Transport or Meetings list. If only one item is selected for the filter, the bullet shows the name of that item. If more than one item is selected, the bullet shows the number of items in the filter.

Filtering agents

To create a filter for selected agents:

1. Select a site.

2. Click **Filter** .
   When the **Agents** and **Teams** tabs appear, the **Agents** tab is selected by default.

3. Click **Add** .
   The **Agents** pane opens, containing a list of available agents and the following controls:

Search *field*	Enables you to enter criteria to quickly find agents in long lists.
Search by: *radio buttons*	Enable you to search for available agents by **First Name**, **Last Name** or **Employee ID**.
↵ **Apply**	Applies the agents you select from the **Available Agents** list to the **Filtered by Agents** list.
✖ **Close**	Closes the **Available Agents** pane without applying any selections.

|	
⊞ **Sort**	Sort the available agents by **First Name**, **Last Name**, **Employee ID**, **Site**, or **Team**.

4. Select one of more agents, and click **Apply** ↵ .

5. In the **Agents** tab, if the filter contains all selected agents, click **Apply** again.

   To remove an agent from the filter, click **Remove** ⊟ before applying the filter.

   To close this pane without applying any of the selected items, click **Close** ✖ .

Filtering teams

Filtering meetings by Team relies on a notion that all team members are also participants of the meeting, otherwise the meeting is filtered out. Most likely, you will filter meetings by Team when you are trying to find a meeting time that is suitable for the entire team (not just a single member of the team).

To create a filter for selected teams:

1. Select a site.

2. Click **Filter** ⊽ .
   When the **Agents** and **Teams** tabs appear, select **Teams**.

3. Click **Add** ✚ .
   The **Teams** pane opens, containing a list of teams and the following controls:

↵ **Apply**	Applies the selected teams to the filter and adds them to the **Filter by Teams** list.
✖ **Close**	Closes the **Teams** pane and does not apply any selections.
⊙ **Search** *field*	Enables you to enter criteria to quickly find teams in long lists.
⊞ **Sort**	Sorts the **Teams** list by **Team** or **Site**

4. Select one of more teams, and click **Apply** ↵ .

5. In the **Teams** tab, if the filter contains all selected teams, click **Apply** again.

   To remove a team from the filter, click **Remove** ⊟ before applying the filter.

   To close the **Teams** tab without applying any of the selected items, click **Close** ✖ .

Viewing and removing filters

The **Filters** appear at the top of the **Shared Transport** list, which now contain only the filtered items. Click any one of the bullets to see the items contained in that filter. For example, in the figure below the **Teams (2)** filter was clicked, which opened the **Teams** tab displaying the items in that filter.

To remove a filter without opening it, click the **X** in the bullet itself.

Figure: Filter Bullets in Shared Transport View