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Workforce Management Web for Supervisors (Classic) Help

Multi-Site Activities

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- Supervisor

Create and configure multi-site activities, which are regular activities within multiple sites in the same business unit, for tracking and reporting purposes.

Related documentation:

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Multi-site activities are regular activities that are being combined, for tracking purposes, into a single multi-site activity and then, associated with a business unit. For example, you might want to track an activity, such as answering inbound calls, for all or some of the sites in one business unit, and track another activity, such as answering email, for all or some sites in another business unit. Grouping the same activity from multiple sites in the same business unit (creating a multi-site activity) enables you to do that.

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.

Multi-site activities agents

The multi-site activities **Agents** pane is read-only and displays the agents who are associated with the multi-site activity.

You cannot associate agents with multi-site activities directly. Agents are associated with multi-site activities if their skills match the skills that are required by the child activities of the multi-site activity or are assigned to work on the child activity directly in WFM Web for Supervisor. Therefore, to adjust which agents are associated with a multi-site activity, change that agent's skill settings or assign the activity to an agent with an effective date. For more information, see the Agent Activities view.

Multi-site activity properties

The **Multi-Site Activities Properties** pane opens when you select a business unit and add a multi-site activity. The properties are as follows for each section:

In the **Multi-Site Activities Properties** section:

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- **Name**—Enter a name for this multi-site activity. The name must be unique within the business unit.
 - **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.

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 multi-site activities

The procedures for multi-site activities and activities are very similar. To create and delete multi-site activities, see [Creating and deleting activities](#).

Assigning activities to multi-site activities

Group multiple activities from various sites into a multi-site activity, creating a single unit for tracking purposes and then, assign them to business units.

Use the **Activities** pane within the **Multi-Site Activities** view to associate activities with multi-site activities.

Tip

To have the correct list of agents that can trade on primary and secondary activities, Genesys recommends to add only one activity under a site to the multi-site activity while configuring.


To assign an activity to a multi-site activity:


1. In the **Objects** pane, select a business unit.
2. In the **Activities** pane, select the multi-site activity with which you want to associate activities.

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3. At the top of the **Multi-Site Activity Properties** pane, click **Activities**.
The Associated Activities pane opens.

4. Click **Assign regular activities**  .
The Activities pane opens.

5. Select the activities you want to associate with this multi-site activity.

To quickly find an activity, use the Search, Filter, or Sort  agents in ascending or descending order.

6. When you have selected all activities, click **Apply**  .



7. In the **Associated Activities** pane, click **Save Now**  .

Tip

An activity can belong to only one multi-site activity. Only activities for the selected business unit are available. Activities for other business units do not appear.

Using filters to assign activities

To use the filter:

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.
 - Retain the check mark in the **All** check box. (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.
 - Retain the check mark in the **All** check box. (If this box is checked, the activities and groups apply to all multi-site activities in the list.)
4. Click **Apply**  .

What to do next

After assigning activities, you can configure Skills and Statistics:

Click **Skills** at the top of the **Multi-Site Activities Properties** pane to configure the skills that you

want to be tracked for the multi-site activity. See [Configuring Skills for Multi-Site Activities](#).



Configure the statistics you want to be tracked for the multi-site activity. For more information, see [Configuring Statistics for a Multi-Site Activity](#).

Configuring skills for multi-site activities

Use the **Skills** pane to add or delete skills that are associated with a multi-site activity.


Adding skills to multi-site activities

To add a skill to a multi-site activity:

1. In the **Objects** pane, select a business unit.
2. In the **Activities** pane, select the multi-site activity, to which you want to add skills.
3. At the top of the **Multi-Site Activities Properties** pane, click **Skills**.
4. When the **Skills** pane opens, click **Add Skills to an Activity**  .
5. 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 Configuration Manager.
 - **Skill Maximum Level**—A maximum skill-level value required for an agent with this skill to perform this activity.
6. In the list of skills, select those that you want to associate with the multi-site 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 Configuration Manager before they appear in this list.
7. When you have finished selecting skills, click **Apply**  .

Deleting skills from multi-site activities


To delete a skill from a multi-site activity:

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**  .

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3. When you have finished deleting skills, click **Save Now**  .

Associating sites with a multi-site activity

If you select a multi-site activity and click **Activities** in the **Multi-Site Activity Properties** pane,

you can select **Assign a Missing Site to Multi-Site Activity**  to assign the activity to a missing site (unless activities from all visible sites were already assigned to a multi-site activity) The **Assign a Missing Site to Multi-Site Activity** pane opens and all sites within the selected business unit are listed.

To create a new, similar activity for each selected site:

1. Select a site.
You can select more than one site by using the CTRL or SHIFT key.
2. Optionally, you can check the **Distribute Multi-Site Open Hours and Skills** check box to assign open hours. See the Tip below.
3. Click **Apply**  .
Under each selected site, WFM generates a new activity that can be renamed and associates that activity with the selected source multi-site activity. Open hours for the activity are 24/7 by default.

Tip

If you checked **Distribute Multi-Site Open Hours and Skills**, then open hours and skills for the generated activity (or activities) will be the same as they are for the selected *source* multi-site activity.

Each site's time zone is used to define the open hours—and it might be a different time zone from the one used by the business unit under which the *source* multi-site activity is located.

An activity generated in this way will always have the same activity type as the multi-site activity that was its source.