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Genesys Engage cloud Workforce Management 8.5.1 Guide

Associating Agents With Activities

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Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to [Workforce Management in Genesys Engage cloud](#).

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 an Activity

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** .
The **Available Agents** pane 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.
To quickly find an agent, enter the agents name into the **Search** field and click one of the two **Search by:** filters (**First Name** or **Last Name** radio button).
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.