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Workforce Management Web for Supervisors Help

Associating Agents With Activities

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Associating Agents With Activities

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** . **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 the List

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**  .