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Workforce Management Web for Supervisors Help

Filtering the Available Agents List

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Filtering the Available Agents List

When you are adding participants to a meeting and there is a large number of agents to select from, you might want to use the **Filter**  (found at the top of the **Available Agents** pane) to easily group them by **Activities**, **Multi-Site Activities**, or **Contracts**.

After you create one or more filters, they appear as bullets above the **Available Agents** list. If only one item is selected for the filter, the bullet shows the selected item's name. If more than one item is selected, the bullet shows the number of items in the filter.






When you click **Filter**  in the **Available Agents** pane, you will see three tabs, all of which have the following controls:

Common Controls






 Apply	Applies the selected items in a list (activities, multi-site activities, or contracts).
 Close	Closes the Filter pane without applying the selected filter conditions.
 Add	Opens a pane containing a list of items for selection (depending on the tab you selected: Activities , Multi-Site Activities , or Contracts).
 Remove	Removes any previously selected items from the Filter by.. list.
 Search <i>field</i>	Uses search criteria to quickly find items in long lists.
 Sort	Enables various sort options, depending on the list of items you are sorting: <ul style="list-style-type: none">• For activities, sort by Activities or Type• For multi-site activities, sort by Multi-Site Activities or Type• For contracts, sort by ascending or descending order

Filtering Agents by Activities



[Link to video](#)




1. In the **Available Agents** pane, click **Filter**  .
The Filter by.. pane opens with the Activities tab selected by default.
2. In the **Filter by Activities** pane, click **Add**  .
3. When the list of activities opens, select one or more activities, and click **Apply**  .
4. In the **Activities** tab, if the filter contains all selected activities, click **Apply** again.
5. To remove an activity from the filter, click **Remove**  before applying the filter.
6. To close this pane without applying any of the selected items, click **Close**  .
The filter now appears at the top of the Available Agents pane.

Filtering Agents by Multi-Site Activities

1. In the **Available Agents** pane, click **Filter**  .
The Filter by.. pane opens with the Activities tab selected by default.
2. Click **Multi-Site Activities**.
3. In the **Filter by Multi-Site Activities** pane, click **Add**  .
4. When the list of multi-site activities opens, select one or more activities, and click **Apply**  .
5. In the **Multi-Site Activities** tab, if the filter contains all selected activities, click **Apply** again.
6. To remove an activity from the filter, click **Remove**  before applying the filter.
7. To close this pane without applying any of the selected items, click **Close**  .
The filter now appears at the top of the Available Agents pane.

Filtering Agents by Contracts

1. In the **Available Agents** pane, click **Filter**  .
The Filter by.. pane opens with the Activities tab selected by default.
2. Click **Contracts**.
3. In the **Filter by Contracts** pane, click **Add**  .

- When the list of contracts opens, select one or more contracts, and click **Apply** .
5. In the **Contracts** tab, if the filter contains all selected contracts, click **Apply** again.
 6. To remove a contract from the filter, click **Remove**  before applying the filter.
 7. To close this pane without applying any of the selected items, click **Close** . **The filter now appears at the top of the Available Agents pane.**

Viewing and Removing Filters

Filters appear at the top of the **Available Agents** list, which now contain only the filtered items. You can see the contents of a filter in two ways:

- Click the filter to open a list of them.
- Hover your cursor over the filter to see a pop-up that displays them.

For example, in the figure below the user clicked the **Activities (2)** filter, which opened the **Filter by Activities** pane listing the items in that filter.

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

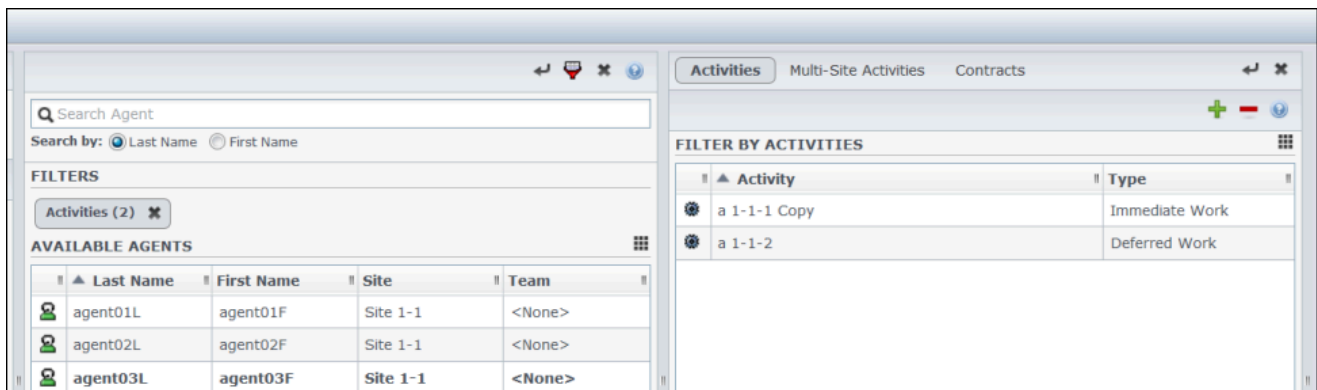


Figure: Filter Bullets in Meetings View