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Workforce Management Web for Supervisors Help

Filtering Agents and Teams

Contents

- 1 Filtering Agents and Teams
 - 1.1 Filtering Agents
 - 1.2 Filtering Teams
 - 1.3 Viewing and Removing Filters

Filtering Agents and Teams


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: <i>radio buttons</i>	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 or 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 <i>field</i>	Enables you to enter criteria to quickly find teams in long lists.
 Sort	Sorts the Teams list by Team or Site

4. Select one or 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.

The screenshot displays the 'Shared Transport' interface. At the top, there is a 'Search Carpool' input field and several icons. Below this is a 'FILTERS' section with buttons for 'agent03L agent03F' and 'Teams (2)'. The main area is divided into two panels. The left panel, titled 'SHARED TRANSPORT', contains a table with columns: Shared Transport, Status, Comments, Size, and Bus. The right panel, titled 'FILTER BY TEAMS', contains a table with columns: Team and Site.

Shared Transport	Status	Comments	Size	Bus
1111111111123	Open	11111111111111	1	<input type="checkbox"/>
asdfkjashdk	Open	sss	1	<input checked="" type="checkbox"/>

Team	Site
New Team (1442265133120)	Site 1-1
<None>	Site 1-1

Figure: Filter Bullets in Shared Transport View