Genesys Administrator Extension Help

Agent Groups

12/20/2025

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Agent Groups

An Agent Group is a logical grouping of agents. Agent Groups are typically set up to provide particular sets of contact-center services.

Viewing Agent Groups

The **Agent Groups** list shows the Agent Groups that are in your environment. It is sorted in a hierarchy by Tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

> **Important**
> Agent Groups that are disabled appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the **Quick Filter** field.
- Click the cube icon to open the **Tenant Directory** filter panel. In this panel, click the Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

To select or de-select multiple objects at once, click **Select**.

Working with Agent Groups

To create a new Agent Group object, click **New**. To view or edit details of an existing object, click the name of the object, or click the check box beside an object and click **Edit**.

To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**.

> **Important**
> When you delete an Agent Group, only the Agent Group object itself is removed from the Configuration Database. Its member Agent objects are not deleted.

Otherwise, select the check box beside one or more objects and click **More** to perform the following tasks:

- **Clone**—Copy an Agent Group.
- **Move To**—Move an Agent Group to another hierarchical structure.
- Enable or disable Agent Groups
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Creating Agent Group Objects

To create an Agent Group object, do the following:

1. Click **New**.
2. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:
    - **Name**—The name of the Agent Group. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment). You cannot change this value as long as this Agent Group contains at least one User.
    - **Capacity Table**—This field applies only for the Enterprise Routing Solution. It is the Capacity Table associated with this Agent Group. Refer to Enterprise Routing Solution documentation for more information.
    - **Quota Table**—This field applies only for the Enterprise Routing Solution. It is the Quota Table associated with this Agent Group. Refer to Enterprise Routing Solution documentation for more information.
    - **Cost Contract**—The Cost Contract associated with this Agent Group.
    - **Site**—The Site containing this Cost Contract.
    - **Script**—Enter a valid expression on the **Script** tab to define the group as a Virtual Agent Group. The expression must be in Virtual Group Script Language (VGSL) and must define at least one skill (with optionally, a skill level) in the following format:
      `Skill("SkillName")>SkillLevel`
      Example
      `Skill("Spanish")>5`
    - **Tenant**—In a multi-tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the `Tenant Directory` field in the object list.
    - **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.
3. To add a Supervisor to this Group:
    a. Click the **Supervisors** tab and click **Add**.
    b. Navigate to the appropriate folder, if necessary, and do one of the following:
        - To add an existing User to this Group as Supervisor, select him or her from the list of Users.
        - To add a new User to this Group as Supervisor, click **+** to create the User in this folder and then select him or her from the list.

The existing Supervisors in the **Supervisors** tab appear as link. When you click an Supervisor **Name** link, the **<Person> Properties** window opens, where you can edit the properties of that particular Supervisor. In the **<Person> Properties** window, click **Back** in the **General** tab to return to the originated configuration object from where you navigated to this associated configuration object. For information on how to create a Supervisor who can monitor, coach, and barge-in on agents, see Team Leads and Supervisors and Monitor Coach And Barge-in Interactions.

4. For each Agent to be added to this Group:
    a. Click the **Agents** tab and click **Add**.
    b. Navigate to the appropriate folder, if necessary, and do one of the following:
        - To add an existing Agent to this Group, select him or her from the list of Agents.
        - To add a new Agent to this Group, click **+** to create the Agent in this folder and then select him or her from the list.
        - Click **Edit Skills** in the **More** menu to edit the skills of one or more agents.

    > **Important**
    > The maximum number of agents you can select and the maximum number of changes you can perform during the **Edit Skills** operation are specified in the **skill_assignment_max_agent_updates** and **skill_assignment_max_skill_updates** options correspondingly. For more information about these options, refer to Configuration Options - general Section in the GAX Deployment Guide.

    The existing Agents in the **Agents** tab appear as link. When you click an Agent **Name** link, the **<Person> Properties** window opens, where you can edit the properties of that particular Agent. In the **<Person> Properties** window, click **Back** in the **General** tab to return to the originated configuration object from where you navigated to this associated configuration object.

5. The **Origination DNs** tab lists DNs from which calls can be routed or diverted to this Agent Group.

    > **Important**
    > Only DNs of the following types can be included in this list: `Routing Point`, `External Routing Point`, `Service Number`, `Routing Queue`, `ACD Queue`, `Virtual Queue`, or `Virtual Routing Point`.

    For each Origination DN to be added to the list of Origination DNs for this Group:
    a. Click the **Origination DNs** tab and click **Add**.
    b. Navigate to the appropriate folder, if necessary, and do one of the following:
        - To add an existing DN to the list of Origination DNs for this Group, select it from the list of DNs.
        - To add a new DN to the list of Origination DNs for this Group, click **+** to create the DN in this folder and then select it from the list.

6. After you have finished creating the Agent Group, do one of the following:
    - Click **Save** to accept the changes and return to the list of Agent Groups.
    - Click **Apply** to accept the changes and return to the **General** tab of this Agent Group.

- Click **Cancel** to discard the changes.

CSV File for Importing and Exporting

You can use the Bulk Import/Export functionality to import Agent Groups from, and export Agent Groups to, a comma-separated value (CSV), file. The import file used for importing and the export file created by exporting data are fully compatible, and a single file can be used for both importing and exporting. Or, you can create the import file yourself, using the general CSV information in this Help file, and the object-specific information contained in this section.

Fields of the CSV File

The source file is a text file in a comma-separated (CSV) format, with an extension of **.csv**.

In the source file each line represents a single Agent Group. The same Agent Group can appear in the source file only once. The unique identifier of the Agent Group in the scope of the source file is the Agent Group Name field.

The columns of the file are the properties of an Agent Group. The first row in the file has column names to identify the fields. The order of the columns is not important. A comma is inserted after each column header or value, or if the column does not have a value, immediately after the previous comma. Any non-mandatory column can be omitted from the source file, depending on user preference and/or the purpose of the file.

The source file contains the following properties for each Agent Group:

Name	Type	Mandatory	Description
Action	ADD, UPDATE, DELETE	Yes	Specifies the action to be taken with this Agent Group data, either create a new Agent Group (ADD) or modify the existing Agent Group (UPDATE) or delete an Agent Group (DELETE). This column is added automatically by GAX when a file is exported, with a value of UPDATE for all records in it. If you create the source file from scratch, you must add this column manually. In either case, this field is mandatory, and you must provide a value for each record.
Name	String	Yes	Name of Agent Group.
Enabled	String	No	Whether this DN is enabled (Y) or not (N).

Relational Columns

In addition to the properties and folders in the table above, each row may contain relations between this Agent Group and other configuration objects, in particular Users who are Agents (`Is Agent=Y`). Every instance of an Agent will have a separate column in the source file. For example, if there are 10 Agents, there will be 10 additional columns in the source file, each column representing each Agent configured. All relational columns are optional.

Each header for a relational column consists of the object type and the object name, which will form a unique column name. So, for example, there cannot be two Agent Groups that have the same name, but an Agent object may have the same name as an Agent Group.

Naming and value rules of relational columns are given in the following table:

Relational Columns

Type	Column Name	Valid Values	Description
Agent	Agent:<agent name>	Y – Add this Agent to this Agent Group N – Remove this Agent from this Agent Group <empty> - No action	The name of the Agent to be added or removed to this Agent Group.

Example

The following data is to be uploaded to GAX to modify three Agent Groups:

Action	Name	Enabled	Agent:doej	Agent:jonesj	Agent:smiths
UPDATE	Gold_Agents	Y	Y	Y	N
UPDATE	Silver_Agents	Y	N		N
UPDATE	Bronze_Agents	Y		Y	Y

The contents of the CSV file for this data looks like this:

```
Action,Name,Enabled,Agent:doej,Agent:jonesj,Agent:smiths
UPDATE,Gold_Agents,Y,Y,Y,N
UPDATE,Silver_Agents,Y,N,,N
UPDATE,Bronze_Agents,Y,,Y,Y
```

Virtual Agent Groups

A Virtual Agent Group (VAG) is similar to an Agent Group except that a Virtual Agent Group has no permanent members. Instead, an Agent becomes a member of a Virtual Agent Group if that Agent meets the criteria specified by the script. Agent membership in a Virtual Agent Group can change dynamically based on changes in the Virtual Agent Group criteria or changes in the object properties of the Agent.

When you click a Virtual Agent Group in Genesys Administrator Extension (GAX), you see its current member Agents.

Important

Although you can create and configure them using GAX, VAGs are primarily used by Reporting applications. For more information about VAGs, refer to the latest version of the *Framework Stat Server User's Guide*.

Warning

If GAX finds Virtual Agent Groups (converted from an earlier installation) that contain illegal script expressions or include permanent members, GAX will display an error message. To preserve correct functionality of the VAGs, you must address the problem manually by either correcting the error or converting the VAG to a non-virtual Agent Group by removing the expression from the configuration option script.