



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Workforce Management Web for Supervisors Help

Associating Agents with a Site

5/7/2025

Contents

- 1 Associating Agents with a Site
 - 1.1 Agents Pane Controls
 - 1.2 Available Agents Pane Controls

Associating Agents with a Site

You can associate agents with an existing site or with a newly created site, by selecting **Agents** at the top of the **Properties** pane.

The **Agents** pane has the following controls:

Agents Pane Controls

 Save Now	Click to save the configuration in the Agents pane.
Search By <i>radio buttons</i>	Select one of three radio button to find an agent in the list: Last Name , First Name , Employee ID .
Search <i>field</i>	Enter the search criteria. For example, the agents first name.
 Add Agent to Site	Click to add agents to the site.
 Remove Agent from Site	Click to remove agents from the site.
 Help	Click to open a Help topic for the Agents pane.

Agents who are associated with that site appear in the **Available Agents** pane and can be filtered. By default, all agents to which you have access appear in this pane.

Available Agents Pane Controls

 Apply	Click to assign an agent to a site.
 Close	Click to close the Available Agents pane.
 Help	Click to open a Help topic for the Available Agents pane.
Search By <i>radio buttons</i>	Select one of three radio buttons to find an agent in the list: Last Name , First Name , Employee ID .
 Search <i>field</i>	Enter the search criteria. For example, the agents first name.
	Click to filter the list of available agents, by



Filter

opening the **Agent Filter** pane.

You can filter this list to display only agents from certain business unit(s) or the entire enterprise, and to include unassigned agents in the enterprise or business unit. See the [figure](#) below.

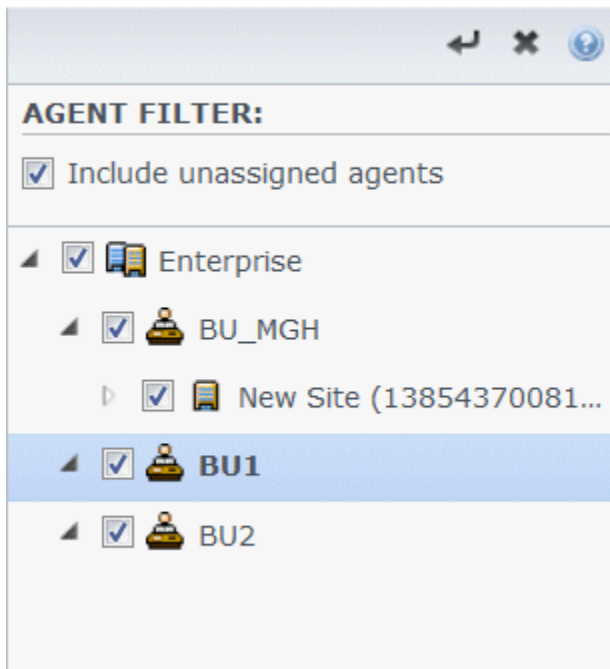


Figure: Agents Pane—Filtering

Sorting Agents in Lists

To sort agents in either the **Agents** or **Available Agents** pane, click the header of the column in which you want to sort the agents.

Adding and Removing Agents from a Site

To add an agent to a site:

1. In the **Agents** pane, click **Add Agent to Site**  .
The Available Agents pane opens.
2. Select an agent from the list and click **Apply**  . (Use the CTRL or SHIFT keys to select several agents at a time.)
3. After you have finished assigning agents, click **Close**  in the **Available Agents** pane.

To remove an agent from a site:

1. In the **Agents** pane, select the agent you want to remove. (Use the CTRL or SHIFT keys to select several agents at a time.)

2. Click **Remove Agent from Site**  .

Warning

When you move an agent from one site to another site, the agent's historical schedules are still available to be viewed and reported. However, any Calendar items related to that agent will not be available when building future schedules for the new site. This is because items, such as Time-Off Types, Exception Types, Contracts, and Shifts, are configured separately for each site.