

GENESYS

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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).
X 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.
Q Search field	Uses search criteria to quickly find items in long lists.
	Enables various sort options, depending on the list of items you are sorting:
	 For activities, sort by Activities or Type
Sort	 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

- Ŷ 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.
 - 🧕 In the Filter by Contracts pane, click Add 📩

When the list of contracts opens, select one or more contracts, and click Apply \checkmark .

- 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.

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FI	FILTERS						1	Activity	"	Туре	1
Activities (2) 🗶						۲	a 1-1-1 Copy		Immediate Work		
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2	agent01L	agent01F	Site 1-1	<none></none>							
2	agent02L	agent02F	Site 1-1	<none></none>							
1 2	agent03L	agent03F	Site 1-1	<none></none>		н					

Figure: Filter Bullets in Meetings View