



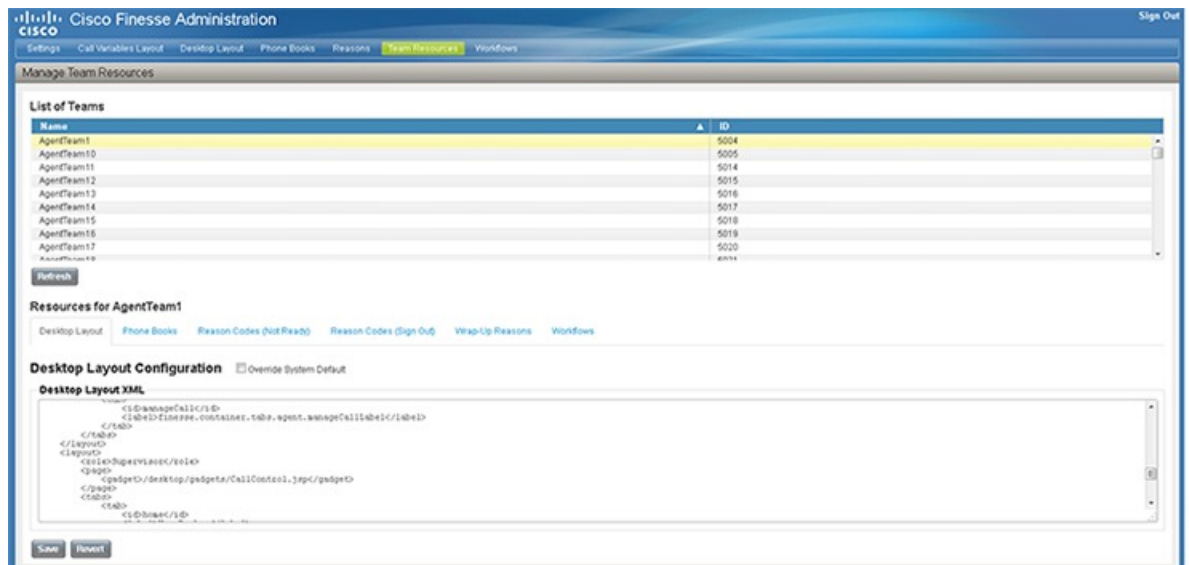
Manage Team Resources

You can assign phone books, reason codes, wrap-up reasons, custom desktop layouts, and workflows to teams on the Team Resources tab of the administration console.

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Team Resources

Use the Manage Team Resources gadget on the Team Resources tab to assign and unassign phone books, reasons, custom desktop layouts, and workflows to teams. Click the Name or ID header to sort the teams in ascending or descending order.



The Manage Team Resources gadget contains six tabs, each enabling you to assign or unassign resources to a team. The tabs are defined in the following table.

Tab Name	Description
Desktop Layout	Use this tab to customize the desktop layout for the team. The default layout is defined in the Manage Desktop Layout gadget. You can define one custom layout for the team.
Phone Books	Use this tab to assign and unassign phone books to the team. Only phone books that are defined in the Manage Phone Books gadget as available to teams are available for assignment.
Reason Codes (Not Ready)	Use this tab to assign and unassign Not Ready reason codes to the team. Only Not Ready reason codes that are defined in the Manage Reason Codes (Not Ready) gadget as available to teams (not global) are available for assignment.
Reason Codes (Sign Out)	Use this tab to assign and unassign Sign Out reason codes to the team. Only Sign Out reason codes that are defined in the Manage Reason Codes (Sign Out) gadget as available to teams (not global) are available for assignment.
Wrap-Up Reasons	Use this tab to assign and unassign Wrap-Up reasons to the team. Only Wrap-Up reasons that are defined in the Manage Wrap-Up Reasons gadget as available to teams (not global) are available for assignment.
Workflows	Use this tab to assign and unassign workflows to the team. Only workflows that are defined in the Manage Workflows gadget are available for assignment.

Actions on the Manage Team Resources Gadget

- **Add:** Assign a phone book, reason, or workflow to the team
- **Save:** Save the phone book, reason, desktop layout assignment, or workflow to the team
- **Revert:** Cancel any changes made before they are saved
- **Refresh:** Refresh the list of teams



Note If you select a team and then click Refresh, the team is deselected and the Resources area for that team disappears. The list of teams is refreshed and you must select a team again.

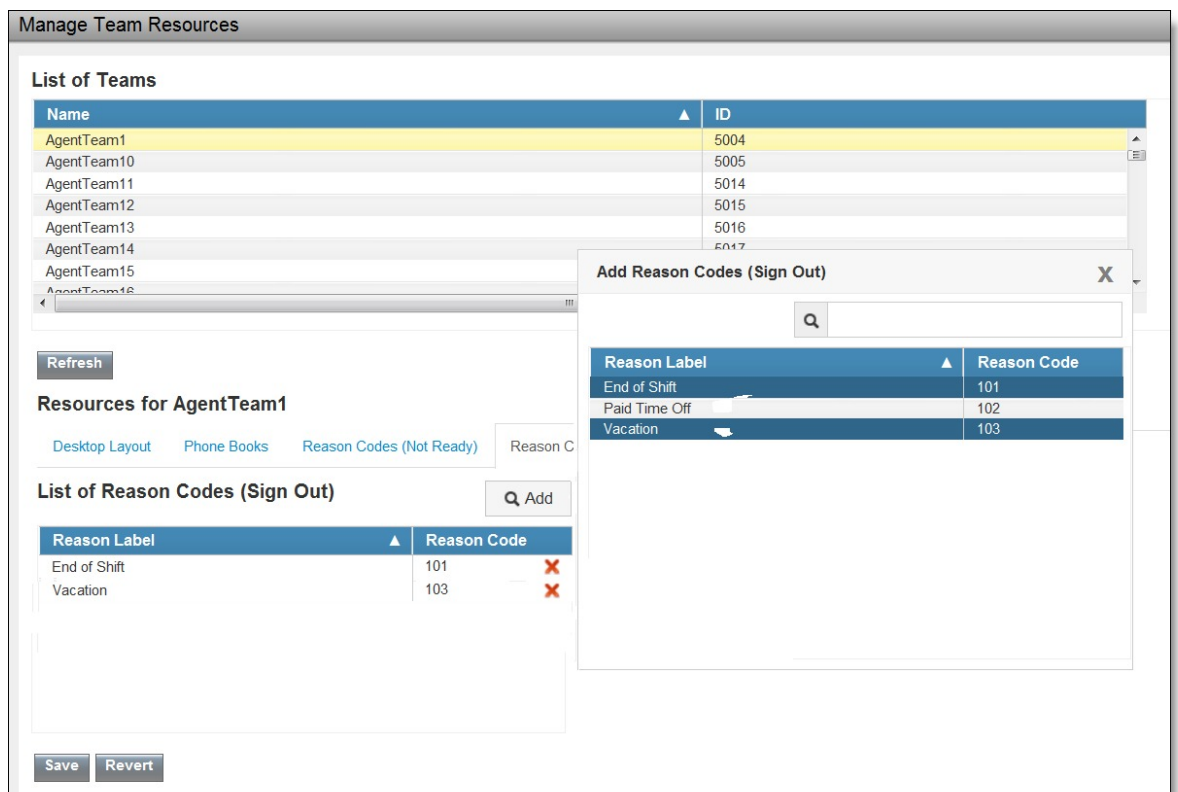
Add or Delete a Team When Database Is Not Accessible

If you add or delete a team when Finesse cannot access the Finesse database, those changes do not appear in the Finesse administration console unless you restart Cisco Finesse Tomcat or the CTI server.

Assign Phone Books and Reasons to Team

Procedure

- Step 1** In the Manage Team Resources gadget, select a team.
Tabs for each available resource appear.
- Step 2** Click the tab for the resource you want to assign for the selected team.
The List of <resource> area appears.
- Step 3** Click **Add**.
The Add <resource> popup appears.



The screenshot shows the 'Manage Team Resources' interface. At the top, there's a 'List of Teams' table with columns 'Name' and 'ID'. Below it, there's a 'Resources for AgentTeam1' section with tabs for 'Desktop Layout', 'Phone Books', 'Reason Codes (Not Ready)', and 'Reason C'. The 'Reason Codes (Not Ready)' tab is active, showing a 'List of Reason Codes (Sign Out)' table. An 'Add Reason Codes (Sign Out)' popup is open, displaying a table of reason codes.

Name	ID
AgentTeam1	5004
AgentTeam10	5005
AgentTeam11	5014
AgentTeam12	5015
AgentTeam13	5016
AgentTeam14	5017
AgentTeam15	
AgentTeam16	

Reason Label	Reason Code
End of Shift	101
Paid Time Off	102
Vacation	103

- Step 4** Select one or more resources from the list to assign them to the team.
Resources you assign are highlighted in blue in the Add <resources> popup and added to the List of <resources> area.
- Step 5** When you has finished assigning resources, click **Save**.

Note You can make changes on all resource tabs and then save them at the same time. If there is an error on one resource tab but not others, the changes on the tabs with no errors are saved while the changes on the tab with errors are not saved.

Unassign Phone Books and Reasons from Team

Procedure

- Step 1** In the Manage Team Resources gadget, select a team.
Tabs for each available resource appear.
- Step 2** Click the tab for the resource you want to unassign from the selected team.
The List of <resource> area appears.
- Step 3** Click the red X next to the resource you want to unassign.
- Step 4** Click **Save**.
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Assign Custom Desktop Layout to Team

Perform the following procedure to create and assign a custom desktop layout to a team.

Procedure

- Step 1** In the Manage Team Resources gadget, select a team.
Tabs for each available resource appear.
- Step 2** Click the Desktop Layout tab.
The Desktop Layout XML area appears. The area contains the default desktop layout XML.
- Step 3** Select the Override System Default check box.
The XML becomes editable.
- Step 4** Edit the XML as desired.
- Step 5** Click **Save**.

The custom desktop layout replaces the default desktop layout for the team after 10 seconds. If a supervisor or agent is signed in when the change is saved, the change does not go into effect on their desktop until the supervisor or agent signs out and signs in again.

Note If you clear the Override System Default check box, any changes you made to the XML are lost and the XML in the editing pane reverts to the default desktop layout XML.



Note If the Supervisor is managing single / multiple teams, the custom layout of the team for which he is a resource / agent is displayed. However, if he is not the resource / agent of a team, the default layout is displayed.

Related Topics

[Manage Desktop Layout](#)

Assign Workflows to Team

Procedure

- Step 1** In the Manage Team Resources gadget, select a team.
Tabs for each available resource appear.
- Step 2** Click the Workflows tab.
The List of Workflows area appears.
- Step 3** Click **Add**.
The Add Workflow popup appears.
- Step 4** Select one or more workflows from the list to assign them to the team.
Workflows you assign are highlighted in blue in the Add Workflows popup and added to the List of Workflows area.
- Step 5** Workflows are executed in the order in which they are listed. Use the up and down arrows to move a selected workflow to the desired position in the list.
- Step 6** When you has finished assigning workflows, click **Save**.
- Note** You can make changes on all resource tabs and then save them at the same time. If there is an error on one resource tab but not others, the changes on the tabs with no errors are saved while the changes on the tab with errors are not saved.
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Unassign Workflows from Team

Procedure

- Step 1** In the Manage Team Resources gadget, select a team.
Tabs for each available resource appear.
- Step 2** Click the Workflows tab.
The List of Workflows area appears.
- Step 3** Click the red X next to the workflow you want to unassign.
- Step 4** Click **Save**.
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