Manage Team Resources

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.

Tab Name	Description
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

Step 1   In the Manage Team Resources gadget, select a team.

Step 2   Click the tab for the resource you want to assign for the selected team.

Step 3   Click **Add**.

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 finish 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

Step 1   In the Manage Team Resources gadget, select a team.

Step 2   Click the tab for the resource you want to unassign from the selected team.

Step 3   Click the red X next to the resource you want to unassign.

Step 4   Click **Save**.

Assign Custom Desktop Layout to Team

Step 1   In the **Manage Team Resources** gadget, select a team.

Step 2   Click **Desktop Layout**.

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   Select from the following editors:

- **Text Editor**
- **XML Editor**

For more information, see *Default Layout XML*.

Step 5   Edit the XML.

Step 6   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 take 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 the supervisor is a resource/agent is displayed. However, if the supervisor is not the resource/agent of a team, the default layout is displayed.

Customize Desktop Properties at Team Level

You can customize the Finesse desktop properties for a specific team.

Step 1   In the **Manage Team Resources** gadget, select a team.

Step 2   Click **Desktop Layout**.

Step 3 Select the **Override System Default** check box.

Step 4 Select from the following editors:

- **Text Editor**
- **XML Editor**

Step 5 Enter the desktop property name in the config key tag.

Step 6 Enter the possible value of the desktop property in the value tag.

The following are the sample desktop property entries, as displayed in the default **Desktop Layout**. To change these desktop property entries in **Text Editor**, remove the comment (<!-- and -->) and set appropriate values.

```
<!-- <config key="enableDragDropAndResizeGadget" value="false"/> -->
<!-- <config key="wrapUpCountDown" value="true"/> -->
<!-- <config key="desktopChatAttachmentEnabled" value="true"/> -->
<!-- <config key="forceWrapUp" value="true"/> -->
```

Note If the property value is defined in the team-specific desktop layout (**Manage Team Resources** > **Desktop Layout**), then the team-specific desktop layout takes precedence over the property value defined in the **Desktop Layout** and CLI.

For more information on customizing desktop properties at **Desktop Layout**, see *Customize Desktop Properties*.

For more information on Finesse CLIs, see *Desktop Properties*.

The following table lists the desktop properties that support team-level updates:

Config Key	Value	Default Value
enableDragDropAndResizeGadget	true|false	false
enableShortCutKeys	true|false	true
forceWrapUp	true|false	true
wrapUpCountDown	true|false	true
showWrapUpTimer	true|false	true
desktopChatAttachmentEnabled	true|false	true
desktopChatMaxAttachmentSize	Range: 1—10 (MB)	5
desktopChatUnsupportedFileTypes	Unsupported file formats include comma-separated valid file extensions. For example: .exe, .sh	.exe, .msi, .sh, .bat
showAgentHistoryGadgets	true|false	true
showActiveCallDetails (for Supervisor Only)	true|false	true
pendingDTMFThresholdCount	Range: 1—20	20
dtmfRequestTimeoutInMs	Range: 1000—200000 (1 to 200 seconds)	5000 (5 seconds)

Config Key	Value	Default Value
enableDropParticipantFor	supervisor_only|conference_controller_ and_supervisor|all	supervisor_only
dropParticipant	agents|all	agents

For more information on Finesse desktop properties, see *Desktop Properties*.

Step 7   Click **Save**.

The change takes effect when the agent or supervisor refreshes the Finesse desktop or sign out and sign in again.

Note   If you clear the **Override System Default** check box and click **Save**. The changes are overwritten, and the editing pane reverts to the default desktop layout XML.

Assign Workflows to Team

Step 1   In the Manage Team Resources gadget, select a team.

Step 2   Click the Workflows tab.

Step 3   Click **Add**.

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 run in the order 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 on others, the changes on the tabs with no errors are saved while the changes on the tab with errors are not saved.

Unassign Workflows from Team

Step 1   In the Manage Team Resources gadget, select a team.

Step 2   Click the Workflows tab.

Step 3   Click the red X next to the workflow to unassign.

Step 4   Click **Save**.