Workforce Management Web for Supervisors Help

Associating Teams with a Site

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Associating Teams with a Site

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

The **Teams** pane controls are described below.

Teams Pane Controls

Save Now	Click to save the configuration in the **Teams** pane.
Create Team	Click to create a new team within the site.
Delete Team	Click to delete the selected team from the site.
Help	Click to open a Help topic for the **Teams** pane.

You can sort the **Team** list, by clicking the **Team Name** column header.

When you create a new team, the **Team Properties** pane opens. Agents who are associated with the selected team appear in the **Team Properties** pane.

When you click **Add Agent to Team** ( ), agents appear in the **Available Agents** pane and can be filtered by **Last Name**, **First Name**, or **Employee ID**. By default, all agents to which you have access appear in this pane. You can edit the team name, add or remove agents from the team, and remove agents from the site

Team Properties Pane Controls

Save Now	Click to save the configuration in the **Team Properties** pane.
Close	Click to close the **Team Properties** pane.
Help	Click to open a Help topic for the **Team Properties** pane.
Name *field*	Enter a name for the team.
Add Agent to Team	Click to add agents to the team.

Remove Agent from Team	Click to remove agents from the team.
Remove Agent from Site	Click to remove agents from the site.

When you add agents to a team, the **Available Agents** pane opens. See the Available Agents Pane Controls. 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 Agent Filter.

To sort agents in the **Available Agents** pane, click any one of the column headers.

Adding and Removing Agents from a Team

To add an agent to a team:

1. In the **Teams** pane, click **Add Agents to Team** .
   The **Available Agents** pane opens.
2. Select an agent from the list and click **Apply** . (Use CRTL or SHIFT 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 team:

1. In the **Teams** pane, select the agent you want to remove. (Use CNTRL or SHIFT to select several agents at a time.)
2. Click **Remove Agent from Team** .

To remove an agent from a site:

1. In the **Teams** pane, select the agent you want to remove.
2. Click **Remove Agent from Site** .
3. Click **Save Now** .

> **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.