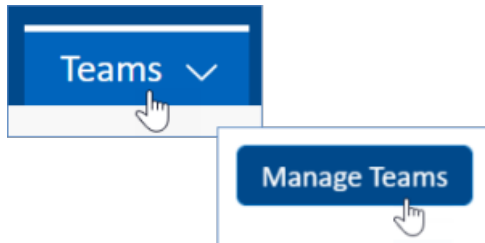


Teams Wizard

The Teams wizard is used to create and edit teams. You can set a team's working hours, define the date and time format displayed to the team, schedule events for the team, and adjust a variety of other options.

To access the Teams wizard:

1. Click the **Setup** gear in the top-right corner and go to **Access > Manage Teams**, or click the Teams table in the navigation menu.



Teams access

2. Edit an existing team, or click New to create a new team.

General Tab

The General tab allows you to define general information about the team, such as the team name, parent team, team leader, team description, and refresh rates. Note the following details when setting the parent team and the team leader:

- The parent team defines hierarchy and is used as a template for new teams. Teams are hierarchical in the sense that changes made to the parent team will also be applied to the subteams below it in the hierarchy. Moreover, an email sent to parent team will also be sent to its subteams, their subteams, and so on, down through the hierarchy. Never use the Company team or any other internal team as the parent team of an end user team, or an email sent to the Company team will inadvertently go to external end users.
- The Team Leader field can be used as a user linked field. It can be populated as a linked field along with the Team Name field into another table, and then the team leader for a team can be emailed using rules. The team leader functions as the head of a team and does not need to be a member of the team.

Refresh Rates

Teams have several types of refresh rates:

- **Message Refresh Rate:** determines how often Agiloft checks for new chat requests. By default, it is set to every 5 minutes, but you should select a greater frequency for teams that you plan to receive chat messages. Use the [Chat Refresh Rate](#) global variable in the Admin Console to allow the selection of a maximum refresh frequency greater than every 10 seconds. For more information about configuring chat, see [Chat](#).
- **Table View Refresh Rate:** specifies how often the system refreshes the table view. It should typically be set to Never unless you are running a time-sensitive support operation. If users are working actively in the system, the table view will refresh every time they edit or create a record anyway. The downside of setting a value here is that the user will never be perceived as inactive, since their browser will keep sending a refresh message to the server. If this value is less than the [Disconnect Due to Inactivity](#) global variable, the user will never be automatically timed out by the system. This is especially important if they are using a floating license, because the license may not be freed up unless the user actively logs out.
- **Table View Locks Refresh Rate:** specifies how often the system checks for locked records.
- **Notifications Refresh Rate:** specifies how often the system checks for new notifications, such as from calendar events.

Events Tab

Use the Events tab to schedule meetings, seminars, training sessions, and other events for whole teams. This tab is often skipped.

Working Hours Tab

On the Working Hours tab, you define the hours that the team works. Working hours have some special uses: you can define rules to run only during a team's working hours, as well as run searches for elapsed time that exclude the nonworking hours of a specific team. You might choose to set the most common working hours for one or more teams and then use the Same hours as [Team] option to copy those hours to subsequent teams.

You cannot set working hours for teams that work into the next day. For example, Sunday: 22:00 to 11:00 would mean 0:00 to 11:00 Sunday and 22:00 to 24:00 Sunday, not 22:00 Sunday to 11:00 Monday. To set working hours that span overnight, configure the shift on each day. To follow the example, to configure a shift beginning on Sunday at 22:00 and running until Monday at 11:00, you would set a segment on Sunday from 22:00 to 24:00 and another on Monday from 0:00 to 11:00.

Working hours for teams outside the Agiloft server's time zone must be adjusted to take this disparity into account. For instance, if a team's working hours are 8 AM to 5 PM Central Time, and the Agiloft server is located two time zones away in the Pacific Time Zone, set this team's hours 2 hours earlier: 6 AM to 3 PM Pacific.

Languages Tab

The Languages tab defines which languages are available to the team. For more information, see [Applying Languages to Teams](#).

Formats Tab

The Formats tab defines date and time formats displayed to primary members of this team. The default for a new team is to show dates and times with this format: Jan 15 2014 17:00:00, with seconds displayed.

Time Format:
☐ 12 Hours ☒ 24 Hours

Time format separator:
☐ Space ☒ Character :

☐ Display Seconds

Date Format:
Month: ☒ First 3 characters, e.g. *Oct*
☐ All characters, e.g. *October*
☐ 2 digits, e.g. *10*

Time format



It typically looks best to turn off the display of seconds. The default, built-in teams display with this format: Jan 15 2021 17:00, without seconds displayed.

Custom Fields Tab

The Custom Fields tab, which turns into another General tab when clicked, contains custom fields added to the Teams table. By default, this includes Backup Team Leader, Include Team in Assigned Team Dropdowns, Team Pager, and related tables showing people for whom the team is their primary team and those for whom it is one of their teams. You can use the related tables to create and add new users to teams. Note that adding a user to a new primary team removes them from their current primary team.

New fields in the Teams table that have been added to the layout will appear here. This is the only tab of the Teams wizard whose layout can be edited.

Include Team in Assigned Team Dropdowns

The Include Team in Assigned Team Dropdowns field is used in linked field filters on various tables to determine which teams are shown. When you create a new team, be sure to check the boxes for tables where you want the team to appear. If you don't check the box for a specific table, the team won't appear in the Assigned Team dropdown for that table.

Include Team in Assigned
Team Dropdowns



- | | | |
|---|---|---|
| <input type="checkbox"/> Service Request | <input type="checkbox"/> Incident | <input type="checkbox"/> Problem |
| <input type="checkbox"/> Change Request | <input type="checkbox"/> Purchase Request | <input checked="" type="checkbox"/> Contracts/Documents |
| <input type="checkbox"/> Item Requested | <input type="checkbox"/> Asset | <input type="checkbox"/> Task |
| <input type="checkbox"/> Service | <input type="checkbox"/> Sales Tables | <input type="checkbox"/> External Support |
| <input checked="" type="checkbox"/> Sourcing Events | | |

Include Team in Assigned Team Dropdowns