# Teams - Teams Profiles

## Introduction

Teams Profiles are used to roll out Teams Rules to the users of a client in a wide-ranging and, above all, efficient manner. With this function, Teams rules can be created and rolled out system-wide for all users. The rules cannot be edited by the users and can only be changed by client administrators of the system. They thus serve as guidelines for all users stored in the profile.

For further explanation on how to create team rules and their functions, please visit the following Wiki-Page.

## General Information

Rules in team profiles are not prioritised higher than the rules configured directly on the user.

If it is not desired that the user rules have an influence on the behaviour, the button "Delete and Add" should be used when assigning users to the profile (see below). If you do not want users to be able to create their own rules, you must proceed as follows:

Menu  Security Groups  Edit desired security group  In the "Users" tab, search for the URI "portal.UserData.Users.Teams" and press the "X" button. This makes the view unavailable for all users in the security group. Repeat this for all desired security groups.

## Configuration

### Creating a Teams Profile

To configure Teams profiles, navigate to the following location in the portal. Menu  User Data  Teams Profiles.

A profile can be created by clicking on "New". Define a name and click on "Save".

### Creating Rules

To create rules, click on "Edit" in the new Teams Profile and then on the "New" button in the "Teams" tab. Define the desired rules and save them.

### Assigning Users

The assignment of users to Teams Profiles can be carried out in the Teams Profile as well as in the master data of the users.

#### Assigning a Teams-Profile

Edit the desired teams profile and switch to the "Agents" tab. Press the "Add" button to open the list of available users.

Add

By pressing the button "Add", the teams profile and the rules it contains are assigned to the user.

Delete and Add

Pressing the button "Delete and Add" deletes the user's existing Teams rules and then assigns the Teams profile and the rules it contains.

To assign teams profiles via the user master data, navigate to Menu  User Data  Users and edit the desired user. In the "Users" tab, which is opened first by default, you will find the drop-down menu "Teams profile name" under the paragraph "Options". Select the desired profile and save.

## Copying Teams Profiles

To copy a Teams profile, navigate to Menu  User Data  Teams Profiles and click the Copy button. Select a source profile and the name for the destination profile and press Save and Next.

Copying creates a profile with the rules of the source profile. The agents from the source profile are not copied. The agents must be assigned manually after copying.