Teams

Teams are used to define collections of users, and can be accessed by clicking the **Setup** gear in the top-right corner and go to **Access > Manage Teams**. Users can be a part of multiple teams, but must always have a Primary Team. The Primary Team determines a lot about how you can interact with the system, so it is vital that users in your system are assigned to the right team. Improper team assignments can prevent employees from doing their jobs, or can enable someone to approve records they shouldn't be able to approve.

End Users

For end users, teams are used to control how the End User Interface (EUI) appears. In the Standard System Demo, the end user teams are Customer Team and Supplier Team. If you have multiple teams that require different branding, color schemes or views, multiple EUIs need to be created. EUIs are stored in the EUI templates table, and are selected through the Primary Team field. Teams can also be associated with a different default language, so it makes sense to have language-based customer teams if you plan to operate in a multi-lingual environment.

Power Users

For power users, teams are also used as a way to assign ownership for records requiring completion, follow through, or approval. Each assignment group requires a separate team. For example, whenever someone creates a Support Task record, the Support Team is notified and is expected to complete the task. Teams can be hierarchical, so it is wise to set up a hierarchy that can send an email to a mid-level team where the members of the mid-level team's sub-teams also receive the email. Power users are assigned a Primary Team, which defines their Look and Feel scheme and default table views. Power users should be members of as many additional teams as needed, so that they are included in relevant emails and assignment lists.

Accessing Teams

The Teams table is used to store Team records in the Standard System Demo. Access teams from **Setup > Access > Manage Teams**. In the Teams table, you can view the list of teams in your system, as well as their ID and a brief description.

Team Record Settings

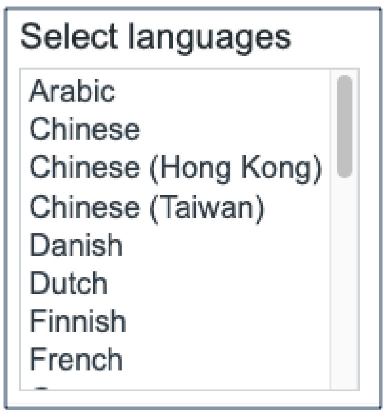
Each Team record holds an interesting array of settings that are used to ensure that each member has access to the correct data. These settings are configured using the tabs of the Teams wizard.

Working Hours

Team records contain a special hard-coded field called Working Hours. This field is configured under a tab in the Team wizard with the same name. The Working Hours tab is used to determine each team's Working Hours, which can be used to control when emails are sent.

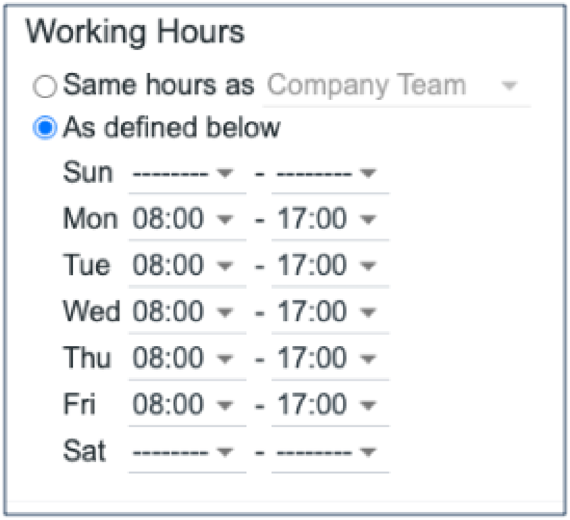
Language

The Language tab determines the language that the EUI appears in for that team. The system supports 20 different languages, as well as additional dialects for Chinese and Portuguese.



Date Format

The settings of a user's Primary Team controls how the default date and time fields appear. For example, Primary Team defines whether a date field is displayed as May 15 2020 18:00 or 05/15/20 6:00 PM. This is determined on the Format tab of the Teams wizard for each particular team. Some individual date fields can be configured to always use a specific, customized format, but if they use the default format, then the person's Primary Team determines the format that the user sees. This format is used wherever a date or time field is used throughout the system and on document templates.



Custom Fields

Team records contain fields for dates, the team name, label, description, Team Leader, and some screen refresh options. From a customization standpoint, you can use the Custom Fields tab of the Table wizard to modify some fields that come by default in the Standard System Demo, or you can add new fields to the Teams table by:

1. Clicking the arrow next to Teams in the left pane
2. Clicking Setup [Teams]
3. Clicking the Fields tab

Team Membership

Team membership, particularly Primary Team membership, determines a user's working hours, email distribution, available views, Look and Feel schemes, and search access. However, team membership itself is determined by two Person record fields that are linked to the Teams Table: a single-choice Primary Team field and a multi-choice Teams field. By default, the Standard System Demo adds the Primary Team value to the multi-choice Teams field. This way, all of a user's team memberships can be found in a single field, which makes searching and filtering easier.

When you initially import users into the system, you can import both their Primary Team and Teams using multiple comma-separated values with no spaces. Once users are in the system, you can update team membership by:

- Editing the Person records of specific users.
- Editing a Team record by looking up and importing users to either the Primary Team Members table or Team Members table, which are embedded in the Custom Fields tab. Looking up and selecting a user for either of these tables changes the linked field in the user's own user record to point to this Team.

Default Teams

The teams shown below are the default teams available in the Standard System Demo. You can delete any of the default teams you do not need, create additional teams, or rename the default teams to match your company's naming conventions. You can delete, create, or edit teams from **Setup** > **Access** > **Manage Teams**.

Teams	Description
1st Level Support Team	First Level Support Team
2nd Level Support Team	Second Level Support Team
Admin Team	Used for system notifications about rules, emails, and other errors
Backup and Storage Team	Asset Backup and Storage Team
Budget Management Team	Team for Budget Managers
Change Advisory Board	Change Advisory Board
Change Approver Team	Change Approver Team
Change Management Team	Change Team
Clause Library Team	Manages language in the clause library
Company Team	Main parent team for other internal teams
Compliance Team Approver	Compliance Team used in contract approvals
Configuration Management Team	Asset Team
Contract Creator Team	For contract requesters
Contract Management Team	Contract Management Team
Custom Applications Team	Asset Software Team
Customer Team	External Customer Team
Database Team	Asset Database Team
Desktop Applications Team	Asset Desktop and Support Team
Document Creator Team	Document Creator Team for internal end users. If using external users, then change the parent team.

Document Management Team	Team for Document Management
Document Reviewers Team	People who have been identified to review documents.
Evaluation Committee Team	Team members evaluate and score Responses.
Executive Team	Executives for Contract and Sourcing Event approvers
Facilities Team	Facilities support team
Finance Team Approver	Finance team used in contract approvals
HR Team	Human Resources Team. Acts on new employee Service Request Tasks.
Internal Customer Team	Internal Customer Team
Internal Signer Team	For contract signers
IT Executive Board	IT Executive Board
Legal Management Team	Legal Team who manages and approves contracts
Legal Requester Team	For people submitting legal requests
Legal Team Approver	Legal Team member who approves contracts
Litigation Team	Handle matters about litigation
Marketing Team	Marketing Team
Network Operations Team	Asset Network Team
Project Manager Team	Team for internal projects
Purchasing Team	Purchasing Team responsible for purchase requests
QA Team	QA for software changes
Risk Team	Risk team approves contracts
Sales Team	Sales Team
Security Team	Asset Security and Support and Change Team
Service Management Team	This is the primary team for Service Managers
Sourcing Event Creator Team	Team that requests Sourcing Events.
Sourcing Event Manager Team	Manages all Sourcing Events.

System Admin Team	Asset Sys Admin Team
Supplier Evaluator Team	Team for users that perform Supplier Evaluations.
Supplier Management Team	Internal Supplier Management Team
Supplier Team	End User team submits Responses.