

Teams

The *Settings* -> *Teams* area allows you to create groups of users and resources to help manage and distribute work to the right people.

Put a group of Users/Resources into a team. Reactive and planned jobs and job requests can be associated to one of these teams, either by editing the job, or when a job is assigned to a job type. In the settings area you can associate the reactive jobs types and planned job types to these teams.

You can restrict users in the team to just seeing their assigned jobs and their team jobs only. This applies to the job list and the job request list in the main application, and also in the Manager App. You can also control email notifications sent to team users. Specifically when a job is assigned to a team, and when a resource completes a task – emails are sent for jobs and job tasks which are assigned to a user's team.

You can restrict a user to only seeing their own teams when choosing a team. And you can restrict the user to only be able to select resources from the same team(s)

Note, a user/resource can be assigned to more than one team.

You can create a team by selecting the *Add Team* button.

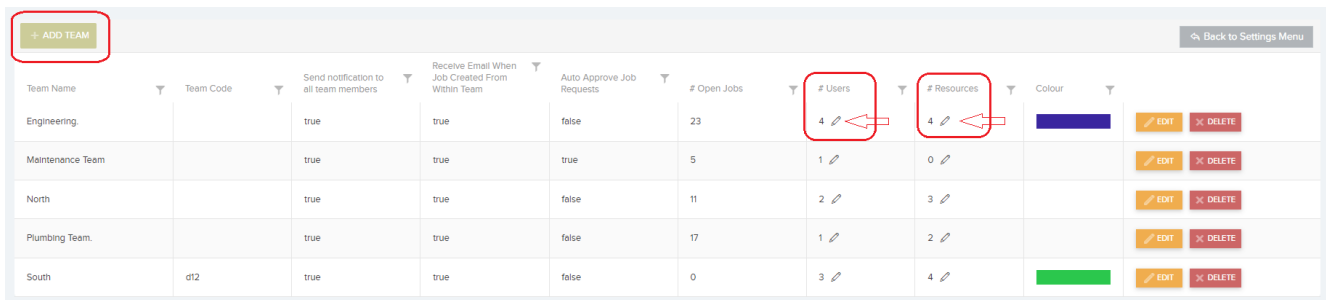
A row will appear in the list of teams where you can fill in a team name, and you can choose to send notifications to all team members (when a job is assigned to the team lead, then all users in the team receive the notifications related to the job). Click the *Update* button to save the new team.

Clicking the pencil icons allow you to allocate users and / or resources to the team.

Once clicked, you will be taken to a new page that shows the

current team members. From here select the *Add User to Team* button.

This will display a pop-up window showing a list of all current users. Select the users and / or resources that you wish to have on the team. When you have added all members, simply close the pop-up window.



Team Name	Team Code	Send notification to all team members	Receive Email When Job Created From Within Team	Auto Approve Job Requests	# Open Jobs	# Users	# Resources	Colour	
Engineering		true	true	false	23	4	4		
Maintenance Team		true	true	true	5	1	0		
North		true	true	false	11	2	3		
Plumbing Team		true	true	false	17	1	2		
South	d12	true	true	false	0	3	4		

Follow the simple steps below to set up teams, job types and users to achieve the above:

- Create a team here
- Allocate one or more users to the team here
- Allocate one or more resources to the team here
- In Settings -> Reactive Job Types and Settings -> Planned Job Types, associate the job types to one of these teams
- In Settings -> Users -> User Details -> General Settings: you can restrict users to only seeing their assigned and team jobs from the setting "Can Only View Their Assigned Jobs and Jobs and Requests in their Team"
- In Settings -> Users -> User Details -> General Settings: The setting **"Can only view resources and teams**

for their teams only" will restrict the resources and teams the user can see to their teams only.

- In Settings -> Users -> User Details -> Email Details -> Email Settings, edit the configuration options **"Receive Email When Job Assigned To This User or User's Team"** and **"Receive Email When a Resource Leaves Task (Complete or More Work Required) – To Assigned User or Team Users Only"**

If the **Send Notification to all team members** setting is set to true then all users in the team will receive an email when a job is assigned to the team. However if the **Receive Email When Job Created From Within Team** is set to false, then notification emails will not be sent if the job creator or person assigning the job is from within the team – they will only be sent if the user creating the job or assigning the job is outside of the team. I hope you understand this!

If **Auto Approve Job Requests** setting is set to true, when a job request is created with the team selected, the request gets auto approved into a job. Please also note that a Team itself may be auto selected based on Job Routing Settings.