

# Teams

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## Creating and working with teams

*Purpose: Add or remove people from teams that you define. Assign these teams to tasks and projects.*

Example Perspective: "Manage Projects and Tasks"

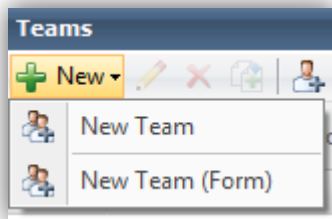
### 1.1 Making a new team

### 1.2 Assigning teams

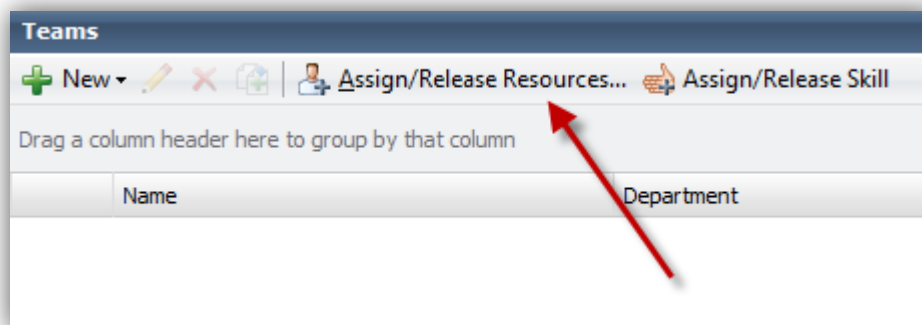
### 1.3 Distributing hours to the team

#### 1.1 Making a new team:

In the Teams view, select New, and choose New Team:





Then select Assign/Release Resource:



You can then select as many people as you need, and select Assign to add them to a team.









**Assign/Release Resources to Resource Groups**

Assign | Release  




Team A

.....

Drag a column header here to group by that column

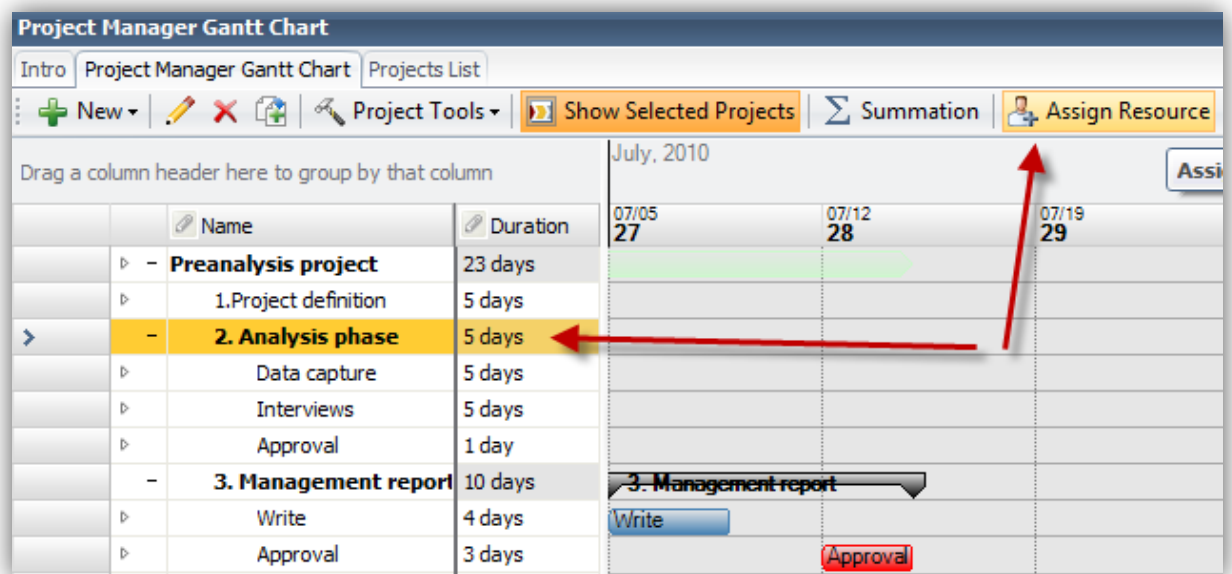
|   | Name      | Employee Category  | Employee Number | Department            |
|---|-----------|--------------------|-----------------|-----------------------|
|  | Search... | Search...          | Search...       | Search...             |
|  | Oli H     | Developer          |                 | SW Development        |
|  | Jan B     | Project Manager    | 12345           | SW Development        |
|  | Casper R  | Developer          |                 | SW Development        |
|  | Tony R    | Service Technician |                 | SW Development        |
|  | Hugo M    | Consultant         |                 | Management Consulting |
|  | Lillian G | Project Manager    |                 | SW Development        |
|  | Nils M    | Project Manager    |                 | Management Consulting |

Your team will now have some members in it:

| Name          | Department  | Co  |
|---------------|-------------|---|
| Team A        |             |   |
| Group Members |             |   |
| Resource Name | Sorting Key | Release ...   |
| Oli H         |             |  |
| Casper R      |             |  |
| Lillian G     |             |  |

## 1.2 Assigning teams

In the Project Manager Gantt Chart you can now select a project or task and select Assign Resource:



Select Team A and assign them. Then you can see Team A and its members beneath your chosen task:


|   |        |                   |             |                          |                     |                     |           |              |
|---|--------|-------------------|-------------|--------------------------|---------------------|---------------------|-----------|--------------|
| > | -      | 2. Analysis phase | 5 days      | <input type="checkbox"/> | 26/06/2010 12:00 AM | 01/07/2010 12:00 AM |           |              |
|   |        | Resource          | Release ... | Assignm...               | Assigned...         | Hours All...        | Remaining | Available... |
| > | Team A |                   |             |                          | 0.0                 | 0.0                 | 0.0       | 0.0          |
|   |        | Oli H             |             |                          |                     |                     |           |              |
|   | >      | Casper R          |             |                          |                     |                     |           |              |
|   |        | Lillian G         |             |                          |                     |                     |           |              |

### 1.3 Distributing hours to the team

Now you can define how hours are distributed amongst the team. Right click on the team column area and use the column chooser to add the column **Team Distribution**:

|   |                          |             |                          |                     |
|---|--------------------------|-------------|--------------------------|---------------------|
| - | <b>2. Analysis phase</b> | 5 days      | <input type="checkbox"/> | 26/06/2010 12:00 AM |
|   | Resource                 | Release ... | Team Distribution        | Assignm...          |
|   | >                        | Team A      | Equal                    |                     |
|   |                          | Oli H       |                          |                     |
|   | >                        | Casper R    |                          |                     |
|   |                          | Lillian G   |                          |                     |

Here you can see Team Distribution is set to equal. This means that if you assign the team 9 hours, everyone on the team will be assigned 9 hours. If you instead choose **Divide** then the hours you enter (9) will be split equally between the team members; each team member will be assigned 3 hours. If you select none, no hours are assigned.

You can easily un-assign a team member from a task with the  button. This only un-assigns that team member from that task, rather than from the team itself. This is useful when you have many members in a team and instead of assigning everyone individually, you can assign the team and un-assign only those members you don't need.

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