Sopheon Accolade®

Process and Project Management - Assigning Project Teams Training Guide

Version: 17.0

About Sopheon Accolade®

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Contents

About the Accolade Education Program

This module is part of the Sopheon Accolade Education Program (AEP). The AEP modules are designed to help Accolade users perform the tasks in their company's business process using the Accolade application. The content in the modules is meant to be used side-by-side with the application, and is part of the overall documentation suite provided for Accolade.

The benefits of using Accolade as part of your company's innovation development process include the following:

- Reduced cycle time by displaying clear structure and visibility.
- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.
- Assured positive user experience through properly developed product requirements.
- Improved communication by automating collaboration between multifunctional team members.
- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.
- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.
- Managed business risk. Break resource commitments into increments or stages.
- Established key baseline information and metrics.

The Accolade documentation suite contains the following additional components:

Document	Contents
Sopheon Accolade What's New in This Release	For each release, review this document for an overview of the new features and changes within the release.
Accolade Online Help	Accessible directly through Accolade, the online Help provides comprehensive how-to and reference information about all aspects of using Accolade.
Sopheon Accolade Administrator's Guide	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
Sopheon Accolade Installation Guide	Provides information about the installation of the application and its required databases.
Dashboards for Accolade Installation Guide	Provides installation information for installing the Dashboards for Accolade component.
Quick Reference Cards	A PDF that can be printed double-sided that provides quick tips and navigation information for using Accolade.

Document	Contents
Online Help for Accolade Add-ins	Accolade add-ins, including Accolade Office Extensions, Accolade SmartDocuments for Google, Accolade SmartDocuments for Office, Accolade Portfolio Optimizer, and Accolade's integration with Microsoft Project, each include their own Sopheon created Help file accessible directly from the application after the add-in is installed. Each Help file describes how to use the features of that particular add-in.

Prerequisites for Using this Module

The contents of this training module assumes you are assigned the Accolade user roles and have a basic understanding of the terms and concepts listed below and how they are used in your installation. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.

Accolade User Roles

- Project Manager
- Process Manager*

Terms and Concepts

- Accolade Navigation

Related Training Modules

- Getting Started with Accolade
- Understanding Projects
- Managing Projects

*If a Project Manager is not assigned to a project, a Process Manager with the appropriate rights can complete most tasks.

Project Teams Overview

Each project has a project team. Project teams in Accolade generally consist of the following:

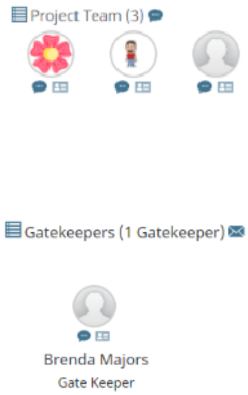
- **Project Manager/Team Leader** - This is the project owner, or project manager, and the user that is assigned as the leader in the project. The assigned project manager has rights to update a variety of data in the projects such as assigning document owners and updating project metrics. Project managers must have the Project Manager user role to be assigned to the team as the manager. Project Managers can also be team members and have document assignments. Process Managers assign managers to projects, or they are assigned by default on project creation.

  Process Managers with Manage Process and Manage Team rights have full management rights to projects in which a project manager is not assigned.
- **Project Team Members** - The members who are completing work for the project, typically by job function. For example, each project in your company may have a Chemist and a Quality Assurance person. Team members must be assigned the Project Team Member user role to be assigned to project teams. The project manager (if the **Project Manager can manage team** setting is set) or Process Manager (with Manage Team access rights) assigns the project team. Project team members can be assigned as the owner of a deliverable or activity within the project.
- **Workflow Action Owners** - The users who are completing actions within a workflow designed to complete a deliverable or activity, for example, reviewing and approving documents. Workflow action owners do not need to be assigned as a team member, but they must have the Document Reviewer user role to be selected as an action owner. These users may not have any other document responsibilities on the project.
- **Gatekeepers** - Users with the expertise and/or authority to decide whether to continue or stop a project when the project reaches a gate. Users must have the Executive user role to be assigned as a gatekeeper for a project.

The project team is represented on the **Team** page within a project, which contains the following views:

- **Simple View** - Provides a single location to access team information for those that do not need to manage the team. This view focuses on people rather than functions. Send email to team members, start chats, and view team member details directly in this view.

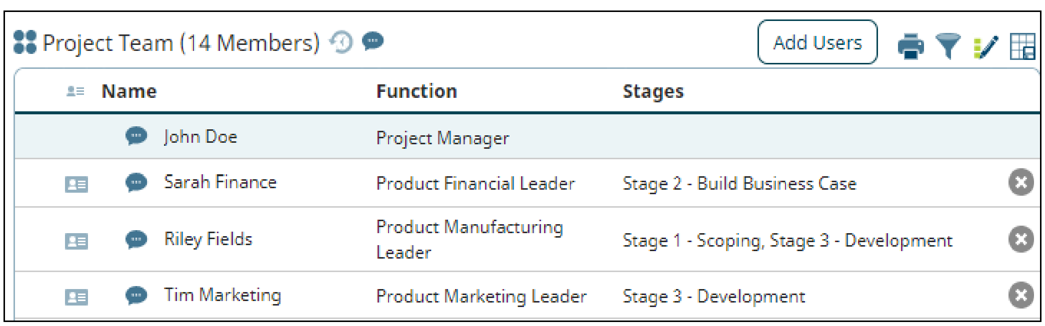
  EXAMPLE Example



The communication options may vary, in the image above, due to your organization's team collaboration setup.

- **Detail View** - Provides a single location to access team information and to assign team members, gatekeepers, and workflow action owners to the team. Use this view if you need to manage and update members of the team. From this view you can also send email to team members, start chats, and view team member details. Toggle between the Detail and Simple views by clicking and in the upper left corner.

EXAMPLE Example



The communication options may vary, in the image above, due to your organization's team collaboration setup.

Process Designers can add a Project Team pod to a page layout and add the layout to the project. This provides an additional location to display users on project teams including the project manager or team leader, project team members, workflow action owners, and gatekeepers. Depending on your system's configuration, you may be able to view a project's team on the **Project Home** page.

Assigning Project Managers to Projects

A project's manager, or team leader, manages the project through its process. They can perform actions that other team members on the project cannot perform, such as adding team members and assigning deliverable owners.

Process Managers (and Idea Managers for Idea projects) with Manage Process or Manage Team rights can assign or change project managers in projects. Only users who are assigned the Project Manager user role can be assigned as the manager for gated and non-gated projects, and they can only be assigned to projects within access groups to which they have access. Only users assigned the Idea Manager user role can be assigned as the manager for Idea projects.

Note: The project manager can also be set by default using settings within the process model definition.

To assign a project manager to a project:

1. Display the project or create a new project.
2. In the **Project Manager** field in the project header, do one of the following:
    - If you created a new project without assigning a project manager, click **[None]**.
    - If you displayed an existing project, click the existing project manager's name.

The communication options may vary, in the image above, due to your organization's team collaboration setup. See Team Collaboration Overview for more information.

3. In the Select a User dialog, select the project manager from the list.

    To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.

    - Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights).
    - Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.
    - Clicking the **Show advanced filters** check box displays or hides the additional filter options.
    - Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned.
4. Select the **Project Manager can manage team** option if the selected user has the ability to assign, remove, and replace members of the project team.
    - If the selected user has the Project Manager user role but does not have Process Manager or Idea Manager with Manage Team rights, the selection made here overrides the Manage Team

rights for that user for this project.

- If the selected user is a Process Manager or Idea Manager with Manage Team rights for the project's access group, this option is selected and disabled.
- If the project manager should have all other project management abilities *except* for managing teams, leave the option cleared.

5. *(Optional)* For existing projects, select the **Retain as Project Team Member** check box if the project manager for the project is changing but you want the previous manager to remain on the project. If the project manager is not retained, they will be removed completely from the project (from all functions/positions in the project team).

    To retain the outgoing project manager as a member of the project team, the user must have the Project Team Member user role.

6. *(Optional)* If prompted, enter a reason for the change. This prompt displays based on settings in the model the project uses.
7. Click **Done** to exit the dialog.
8. Click **Apply** to save your changes.

Assigning Team Members to Projects

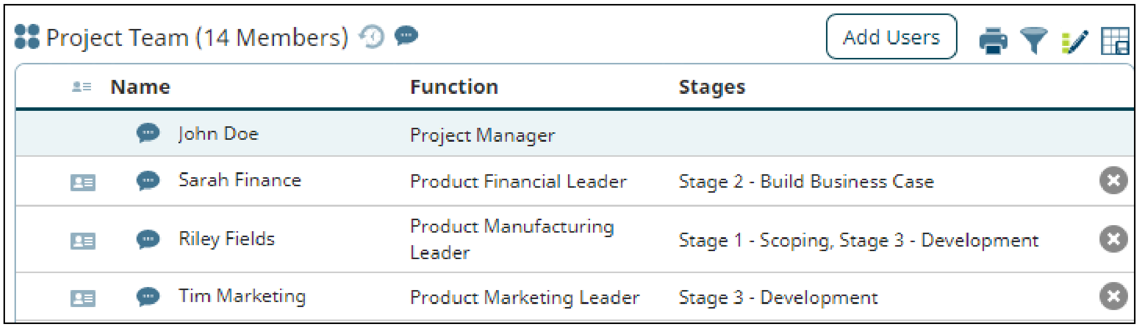
Assigning team members to the functions within a project helps to automate the document ownership within that project and allows team members to view who is responsible for each functional area within projects.

Note: The **Project Manager can manage team** option must be selected for the assigned project manager to assign, remove, and replace project team members. If a project manager does not have Manage Team rights, or if a project manager is not assigned, a Process Manager (or Idea Manager for Idea Projects) with Manage Team rights can assign, remove, and replace project team members.

As you assign team members to project functions, the team member is automatically assigned in current and future stages as the document owner of every project document that is assigned to that function that currently does not have an assigned owner. If deliverables and activities are hidden due to conditions, the user will not be able to see the documents. However, they will be automatically assigned to the documents so that if the deliverable or activity becomes visible again, it will display on the page for the function.

If you are an Administrator or Process Designer, you are able to affect the visibility of unassigned functions on the Team Tab. By default, functions that are not assigned to either a team member or a stage are shown on the Team Tab. However, you can change this setting in the General Parameters section.

The functions available for assignment are based on the functions assigned to documents within the project. Additionally, the project team configuration in the model may restrict the user selection to users with a matching function assignment.



The options and display order on the **Team** page may differ between projects, based on the process model configuration. The procedure below follows the default configuration.

To assign a team member to a project:

1. Display a project and select the **Team** page to display the current team members assigned to the project.

   If necessary, select **Detail View**.

   You can configure each section in the Team page to filter what displays, for example by stage or by function, and select which columns to view within each section. Save your selections to display each time you display the page.

2. In the **Project Team** section, add members of the project team to functions for automatic assignment to deliverables and activities, or as members without a function that can be assigned manually.

Member Type	Description
To assign a team member to a function	In the **Project Team** section, click **[None]** under the name and select the user to be assigned to the function. To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field. • Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights). • Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can

Member Type	Description
	assign any user. • Clicking the **Show advanced filters** check box displays or hides the additional filter options. • Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned. You can update and assign users to functions as appropriate for deliverable and activity ownership, however, the deliverable and activity configuration in the model may restrict the owner assignment to users with a specific role. **Note:** The **Order** attribute of a function's configuration determines the order the functions display on the **Team** page.
To add one or more team members with no function designation	Click **Add Users** at the top right of the grid and select one or more Accolade users from the user list. To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field. • Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights). • Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user. • Clicking the **Show advanced filters** check box displays or hides the additional filter options. • Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned. Highlight the user name(s) in the Available Users window and click **Select**, or double-click each user's name to move them from the **Available** list to the **Selected** list, and click **Done** to exit the dialog.

3. *(Optional)* Complete the following for each project team member as necessary:

Field	Description
(Primary)	Select the user that is the primary contact for their function, or job role, on the project.

Field	Description
	In large projects where a function can have many members, it may be useful to identify one member of the project as the primary member of their function who can serve as the contact person for the function group, or who can perform actions on behalf of the function in the project. **Note:** Identifying the primary member of a function does not add additional rights for the user.
(Create Status Reports)	Select this check box to enable selected team members to create status reports for the project, in the form of brief status messages and metric value settings, if set in the model. All team members that are assigned the Process Manager user role have the right to create status reports based on their user role. This right cannot be removed.
(Extend Edit Rights)	Check box indicates if the user has extended project edit rights. If enabled, selected team members are allowed to the following project information: **Project Name**, **Project Code**, **Description**, **Status**, **Manage Project** button items, **Deliverables** and **Activities**. **Important!** This extension of rights is for the specified project, and is enabled regardless of the user's assigned project or system roles. To extend edit rights to all team members click the check box at the top of the dialog box, or click the individual check box(es) to select individual members. Once you have made your selections, click **Add Edit Rights** at the bottom of the dialog. • Only users with the Project Team Member role can have extended edit rights. • This feature is an optional Accolade configuration solution that you may not have access to if your company has not purchased it. Contact Sopheon Customer Support for more information. To remove edit rights, click the relevant check box(es) and click **Remove Edit Rights** at the bottom of the page. **Note:** Changes to this field are applied and saved automatically when the Add/Remove button is clicked.

Click next to the team member's name to view their assignment, gatekeeper, and workflow action details.

4. Click **Apply** to save your changes.
5. Continue with project team setup by assigning gatekeepers, gate owners, or workflow action owners.

Notes:

- To completely remove users from a project team, click in the row. The user is removed when you click **Apply** and save your changes. If the removed user was tied to a function, the function is set to **[None]**.
- Click in the Project Team heading to view and print a history of the changes made to the team members assigned to the project. Project team member changes are also available in Accolade online reports (**Projects > Charts & Reports**) or using the Accolade Office Extensions add-in.
- If a user is deleted or deactivated in Accolade, they are removed from the project team; however, they remain listed as the owner of any the documents in the project. For reporting and record keeping purposes, deleted or deactivated users remain as the recorded owner for documents that have a **Completed** status.
- Adding members to the project team's functions assigns those users to documents in current and future stages that do not have owners throughout the project. However, changing assignments on individual documents does not update the team members assigned to each function for the team.
- The extended fields display on the user selection dialog box can be set to display or hide by default by using the **Display Extended Fields on User Selector Default** system parameter.
- If the **Enforce Project Security for Add Team Member** system parameter is set to **1**, or the **Enforce Project Security** option is set for the project, only project team members who have access to the project through security definitions are available to add as members of the project team. You cannot add a project team member as an exception to their security rights.
- The owner of a project's Microsoft Project plan also has rights to add or remove team members from a project. However, plan owners only have the right to add or remove team members by changing and saving the plan, not by making the change to the project team through the project's **Team** page in Accolade.

Exercises - Assign a User to a Project Team

Try out what you have learned!

- Assign a member to a function.
- Assign a deliverable in the project to the function to which you added the user.
- The deliverable owner should match the user assigned to the function.
- Add a different user with no function to the project team.
- Select a team member serve as the primary contact on the project.

Replacing Individual Project Team Members

As personnel and resourcing changes the members of project teams, users can replace a function's assigned team member on the project.

> **Note:** The **Project Manager can manage team** option must be selected for the assigned project manager to assign, remove, and replace project team members. If a project manager does not have Manage Team rights, or if a project manager is not assigned, a Process Manager (or Idea Manager for Idea Projects) with Manage Team rights can assign, remove, and replace project team members.

The following procedure details user reassignment at the individual project level. To find and replace users across the system and across multiple projects, see "Replacing Users Across Multiple Projects" on page 17.

The options and display order on the **Team** page may differ between projects, based on the process model configuration. The procedure below follows the default configuration.

To replace a team member on a single project:

1. Display a project and select the **Team** page to display the current team members assigned to the project.

   If necessary, select **Detail View**.

   You can configure each section in the Team page to filter what displays, for example by stage or by function, and select which columns to view within each section. Save your selections to display each time you display the page.

2. In the **Project Team** section, click on the current user's name.

   Click next to the team member's name to view their assignment, gatekeeper, and workflow action details.

3. In the Select a User dialog, select the new user to be assigned to the function.

   To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.

- Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights).
- Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.
- Clicking the **Show advanced filters** check box displays or hides the additional filter options.
- Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned.

4. Click **Done** to exit the dialog.
5. Add additional team member options as necessary.
6. Click **Apply** to save your changes.
7. On the document details pages or the **Stages** page, manually change the ownership of any deliverables and activities that still show this team member as owner.

   If the deliverable or activity's assigned function/owner combination is different than the function/owner combination on the project **Team** page, a team member change on the **Team** page does not propagate into the project. You must manually change the owner on the deliverable or activity as well.

Notes:

- To completely remove users from a project team, click in the corresponding row. The user is removed when you click **Apply**. If the user was tied to a function, the function is set to **[None]**.
- Click in the Project Team heading to view and print a history of the changes made to the team members assigned to the project. Project team member changes are also available in Accolade online reports (**Projects > Charts & Reports**) or using the Accolade Office Extensions add-in.
- If a user is deleted or deactivated in Accolade, they are removed from the project team; however, they remain listed as the owner of any the documents in the project. For reporting and record keeping purposes, deleted or deactivated users remain as the recorded owner for documents that have a **Completed** status.
- If you replace the owner on a document whose status is **Completed**, the original owner is still listed as the owner of record for the document for reporting purposes.
- The extended fields display on the user selection dialog box can be set to display or hide by default by using the **Display Extended Fields on User Selector Default** system parameter.
- The owner of a project's Microsoft Project plan also has rights to add or remove team members from a project. However, plan owners only have the right to add or remove team members by changing and saving the plan, not by making the change to the project team through the project's **Team** page in Accolade.

Replacing Users Across Multiple Projects

Replace users on multiple project and project assignments as employees leave, your company undergoes reorganization, or you need to otherwise edit team members in mass. You must be a Process Manager or Idea Manager with Manage Team rights to replace a team member on all projects. Replacing users across multiple projects includes reassignment in the following areas:

- Deliverables
- Activities
- Workflow action owners
- Gate keepers and gate owners
- Project team members and leaders
- Non-Accolade tasks.

To successfully reassign a user on projects and assignments, ensure that the user being assigned has similar roles, rights, and security as the user being replaced. User replacement respects project security. Users will not be reassigned to projects they do not have access to.

To replace a user across the system:

1. From the **Workspace** menu, select **Team Management > Find and Replace Team Members**.
2. In the **Find User** section in the left panel, click **[None]**.
3. In the Select a User dialog, select the user in the list to be found and replaced.

   To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.

   - Clicking **Select current user** will select the current user as the user to be found and replaced.
   - Selecting a **Function** in the drop-down displays available users that are assigned to the function.
   - Clicking the **Show advanced filters** check box displays or hides the additional filter options.
   - In the **Active/Inactive** drop-down, select to filter users by active, inactive, and deleted status from the following options:
     - **Active Users Only** - excludes deleted and inactive users.
     - **Show All Users** - displays active, inactive, and deleted users.
     - **Inactive or Deleted Users** - displays only users marked as inactive or deleted. Both display as *grey italics*.
   - Clicking **Clear** removes the current user assignment, and displays **[None]** to indicate that no user is assigned.
4. Click **Done** to exit the dialog.

   Project name, project ID, user assigned, and specific assignments generate for the selected user, but only projects you have visibility into display.

5. *(Optional)* In the top right corner, do any of the following to refine the project list.
   - **Sort** - Sort by project name, project ID, or selected metric in ascending order in the **Sort** field in the top right corner.
   - **Filter** - Click to select the project name, project ID, and selected metrics to refine the project list to better meet your needs. Filter preferences are only used to refine the current view and cannot be saved.

     Setting filters after you have defined user replacements may discard pending changes.
   - **Select Metric** - Click to select up to three metrics to display addition project information. Search for metrics by category or metric name.
6. Select the check box for projects on which to replace the user.
7. Click **Replace on Checked** in the left panel and select the new user to assign.

   To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.
   - Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights).
   - Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.
   - Clicking the **Show advanced filters** check box displays or hides the additional filter options.
   - Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned.
8. Click **Done** to exit the dialog.

   The user selected to replace propagates to all checked projects and assignments.

   Modify user replacement as necessary by selecting the appropriate check boxes and a user in the **Replace on Checked** field to replace with more than one user. Replace users on individual projects and assignments by changing the user under the project name.

   To remove previously selected users from the field, click **Clear** in the Select a User dialog.

   Important! Review your user updates carefully. You cannot return to the original project list or undo changes after clicking **Apply** to save your changes.

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9. Click **Apply** to save your changes.

   Projects that failed to replace users display. Otherwise, the users were successfully replaced on all projects.

Notes:

- To remove a user selected to replace, click the **Replace on Checked** field and click **Clear**. This removes the user reassignment on all checked projects. To replace or remove a user on individual projects or assignments, click the user under the project name, select the user to reassign or clear user, and click **Done**. Click **Apply** to save your changes.

- Deliverables and activities with applied conditions display regardless of condition visibility settings applied elsewhere in the system. The conditioned deliverables will still respect visibility on project. User replacement still applies to all deliverables and activities regardless of conditions.
- Updating users on the **Find and Replace Team Members** page will not update owner assignments where status is **Completed**. The original owner is still listed as the owner of record for the document for reporting purposes.
- If the **Enforce Project Security for Add Team Member** system parameter is set to 1, or the **Enforce Project Security** option is set for the project, only users who have access to the project through security definitions will be successfully reassigned.

Adding Saved Teams to Projects

As a Process Manager or a Project Manager assigned as the leader of the project, you may have a core group of people, or several core groups of people, that always work together on your projects, including Team Members, Gatekeepers, and Document Reviewers. Creating and adding a saved team saves time when creating projects whose team may contain all or the majority of the same people.

Note: The **Project Manager can manage team** option must be selected for the assigned project manager to assign, remove, and replace project team members. If a project manager does not have Manage Team rights, or if a project manager is not assigned, a Process Manager (or Idea Manager for Idea Projects) with Manage Team rights can assign, remove, and replace project team members.

You can load a team that you have saved, or one that is available within the access groups to which you have access. If you load a saved team to a project that already has a saved team, review the Loading Saved Teams to Projects That Already Have a Team section below.

Important! Adding a saved team only adds members of the team in various roles and functions. It does not add functions to a project, nor does it overwrite existing members of the project team.

To add a saved project team to a project:

1. Display a project and select the **Team** page to display the current team members assigned to the project.

   If necessary, select **Detail View**.

   You can configure each section in the Team page to filter what displays, for example by stage or by function, and select which columns to view within each section. Save your selections to display each time you display the page.

2. Expand the Manage Team panel and click **Add Teams**.
3. Select the saved team to load from the drop-down menu.

   The drop-down menu displays only the saved teams to which you have access.

4. Click **Add Saved Team**.

   Members of the saved team are added to the project.

5. Make team member adjustments as necessary.
6. Click **Apply** to save your changes.

Loading Saved Teams to Projects That Already Have a Team

If you load a saved team to a project that already has a team assigned, review the following about how members from the saved team are loaded:

- Team members from a saved team are only added to functions that have an available opening in the project. If a team member is already assigned to the function in the project, the team member from the saved team is added to the project, but with a function of **[None]**.

  For example, you have a partial team defined and the function of Quality Assurance already has a team member assigned to it. If the team you select to load to the project also has a team member assigned to Quality Assurance, the member from the saved team does not overwrite the Quality Assurance function.

- If a team member on the saved team is assigned to a function that does not exist in the project, that team member is added to the project with a function of **[None]**. Functions are not created when you load a team.

Notes:

- Gatekeepers and workflow action owners are set automatically based on functions and assignment type. If a member of the saved team in one of these roles is assigned to a function not available in the project, they are not added when you load the saved team.
- If more than one gatekeeper or workflow action owner is part of the saved team, only the first of each is added when you load the saved team.
- If you do not have access to add gatekeepers or workflow action owners to a project team, those roles are not added when you load a saved team.
- Click in the Project Team heading to view and print a history of the changes made to the team members assigned to the project. Project team member changes are also available in Accolade online reports (**Projects > Charts & Reports**) or using the Accolade Office Extensions add-in.
- If the **Enforce Project Security for Add Team Member** system parameter is set to **1**, or the **Enforce Project Security** option is set for the project, only team members who have access to the project through security definitions are added as part of a saved team. If these options are enabled, you cannot add a project team member as an exception to their security access.

Saving Project Teams

Projects require resources to complete them. You may have a core group of people, or several core groups of people, that always work together on your projects, including Team Members, Gatekeepers, and Document Reviewers. After you establish a team on a project, save that team so it is assignable to another project without having to redefine the team for each project. Saving a team not only saves the employees assigned to the team, but also saves their functions, assignments, and additional extended project edit rights.

You can save teams as private for use only on your projects, or you can make a saved team available to others based on access groups. To add a saved team to a project, see Adding Saved Teams to Projects.

Note: The **Project Manager can manage team** option must be selected for the assigned project manager to assign, remove, and replace project team members. If a project manager does not have Manage Team rights, or if a project manager is not assigned, a Process Manager (or Idea Manager for Idea Projects) with Manage Team rights can assign, remove, and replace project team members.

To save a project team:

1. Display a project and select the **Team** page to display the current team members assigned to the project.

   If necessary, select **Detail View**.

   You can configure each section in the Team page to filter what displays, for example by stage or by function, and select which columns to view within each section. Save your selections to display each time you display the page.

2. Assign the team members according to their function, as necessary.
3. Expand the Manage Team panel and expand **Add Teams**.
4. Click **Save Team for Other Projects**.
5. Complete the following information about the team:

Field	Description
Display Name	Select a team from the list to modify an existing saved team, or select **New Team** and enter a new name for the team. The team name is the name that displays when selecting a saved team. **Important!** If you select an existing team, you are selecting to modify the information in the Save Team dialog box, and the members assigned to the team. When you click **Apply**, the team is saved with the team members listed for the team when you clicked **Save Team for Other Projects**, possibly overriding the original saved team. To make changes to a saved team without saving the changes on a particular project, create a blank project, load the team members, select **Save Team for Other Projects**, and make the modifications in the blank project.
System Name	Enter a unique, shorter name that identifies the team in queries, reporting views, Accolade Office Extensions, and field codes. The name must be unique among team names and can contain only letters (English alphabet), numbers, and the underscore.
Include	Select the categories of team members to save.

Field	Description
	For example, if you only want to save a team that consists of the Project Team members, select **Project Team**. The team is saved with only the members you have selected for those categories.
Availability	To make the saved team a private team that only you can use, click **Private**. Note that this does not change the resource availability in other parts of Accolade. To make the team available to others to use, select **Shared With** and then select the access groups to which the team is available. Only users assigned to the selected access groups can view and apply the saved team.

6. Click **Apply** to save your changes.

Notes:

- You can only save teams to access groups to which you have access.
- You currently cannot delete a saved team. However, you can revise a saved team by creating a new project team and saving the team with the same name. The saved team is overwritten with the changes from the team with the new name.

Restricting Individual Project Teams to Respect Security

Typically, any Accolade user with the correct user roles can be assigned as a member of a project, regardless of whether they would otherwise have access to the project. However, it may be necessary to restrict the users that can take part in a project based on their access group, security list, and security profile definitions. For example, if your company is moving intellectual property between countries or regions, you may require tighter security around who can be assigned to a project.

Process Designers can set the **Enable Project Security** option in a process model to restrict who can be added to projects that use the model. However, any existing projects that use that model are not updated. Process Managers with Manage Process rights can set the **Enable Project Security** option within a project to automatically remove users who do not meet the required security. Setting this option also prevents the addition of users to the project team who do not meet the security requirements. As a user's security settings change, they are removed from projects that do not match their security settings.

Note: The **Enable Project Security for Add Team Member** system parameter restricts the addition of team members and project managers to a team based on security. The **Enable Project Security** option on the model and project further restricts the addition of other team members, such as gatekeepers and document reviewers on the individual project.

To restrict individual project teams to respect security:

1. Display the project.
2. Click ☰ in the upper right corner of the page and select **Edit Details**.
3. Check the **Enforce Project Security** box.
4. Click **Save** to apply the setting.

   Any users that do not meet the security requirements for the project are automatically removed.

Notes:

- If **Enforce Project Security** enabled on a project, users are also removed when their access group, security list, or security profile settings change and no longer match the security settings for the project.
- Depending on your system's configuration, updates to visibility and security may be done on a custom project page.

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