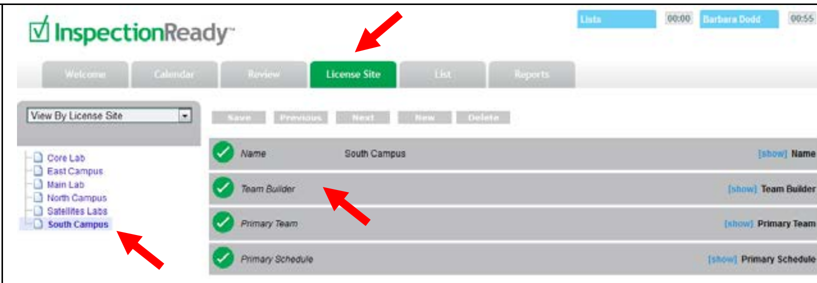
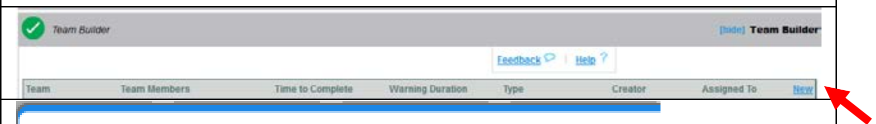
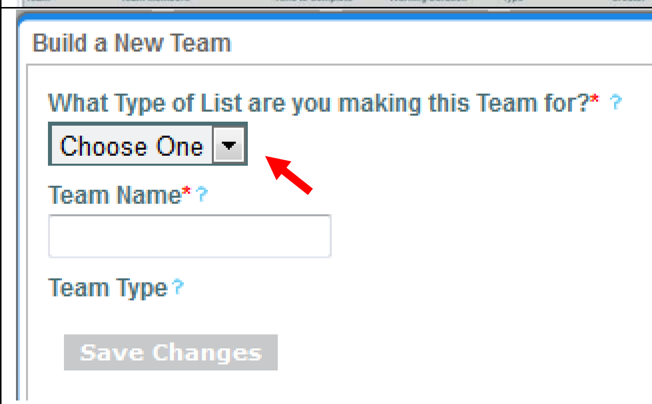
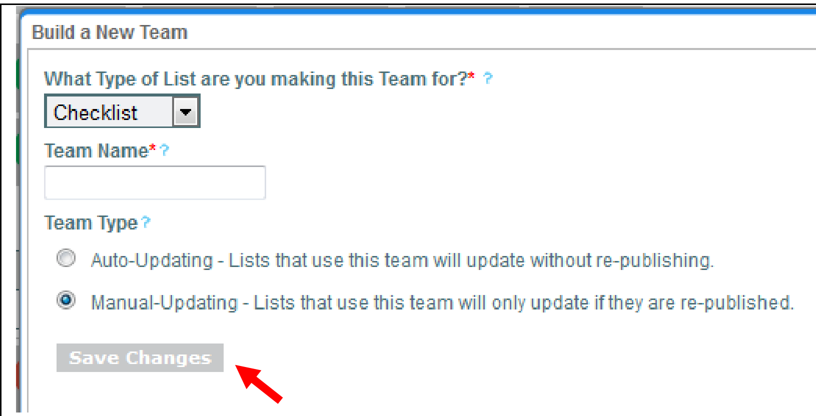
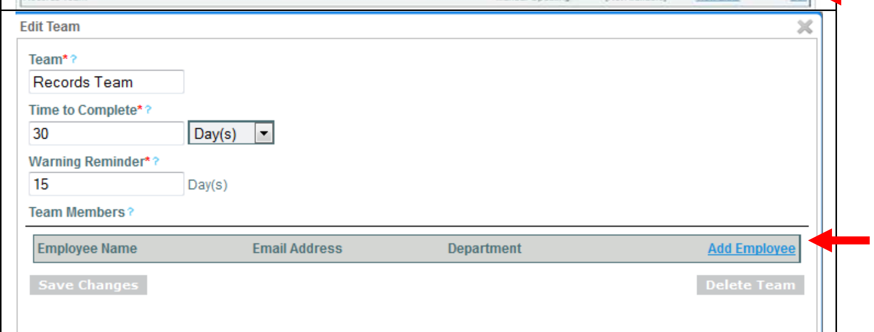
Team Builder – Checklist

Step	Action	
1.	Navigate to the **License Site** Tab. Select the **Team Builder** color bar. This is where <u>all</u> teams will be created that will be used within the License Site. For this example, South Campus is the License Site. Select and expand the **Team Builder** color bar.	
2.	Click on <u>New</u> to build a new Team.	
3.	In the Build a New Team window, there are several fields to select. Type of List: Depending on the List you want to make, you will want to create certain types of Teams. By choosing what you want to make, we can guide you in making a correct Team type. Your options include: • Checklist • Inspection • Policy Team Name: This field allows you to give the team a short 30-character name. It is displayed in the Team ID column in the **Team Builder** color bar. For this example, we will build a team for Checklist. From the drop-down menu, select Checklist.	

4.	When choosing Checklist, InspectionReady gives you options for type of team. The type will determine how your Team behaves. This determines how tasks are sent out when a List is published. <u>Auto-Updating:</u> When new members are added to this team, they will receive any tasks that have not yet been completed. <u>Manual-Updating</u>: When new members are added to this team, they will not receive any past tasks that have not been completed, only future tasks. For this example, Manual-Updating is used and the team name is Records Team. Select **Save Changes**.	
5.	Select Edit for the Records Team.	
6.	<u>Time to Complete:</u> Choose the amount of time the assignee has to complete the task that will be assigned. This can be in days, weeks, months, or years via the drop-down menu. The Time to complete is synonymous with the Due Date that is created when you build your schedule. See the Quick Reference License Site - Primary Schedule for more information. <u>Warning Reminder:</u> Enter when you want the warning reminder to be sent to the assignee. The warning date is the number of days from when the task is due, the due date. In this example, the warning reminder will be sent out 15 days before the task is due. Select Add Employee.	

InspectionReady

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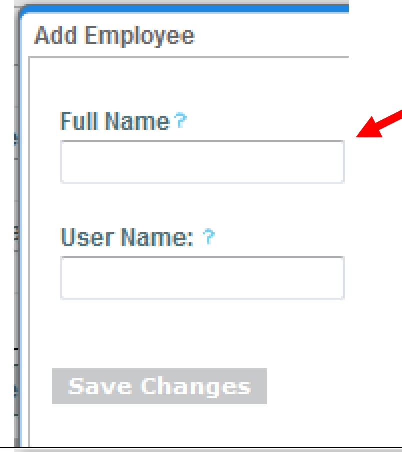
<td>7.</td>
<td>In the Add Employee window, the Full Name field is an auto-complete which will let you search for employees by their full name. The User Name field is an auto-complete which will let you search for employees by their user name.

Begin typing in a name and then select the name you want.</td>
<td>
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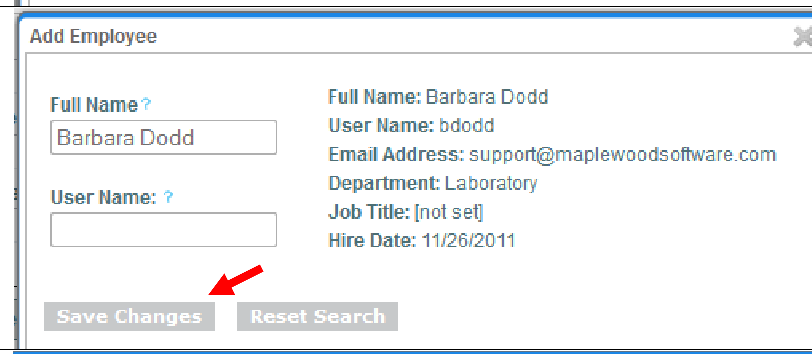
<td>8.</td>
<td>Select Save Changes.</td>
<td>
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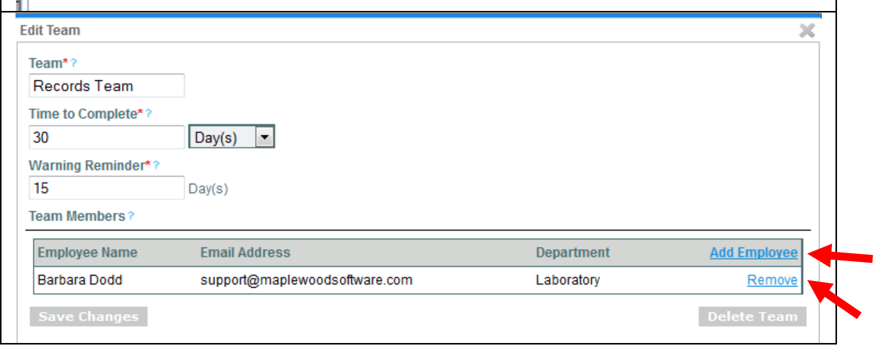
<td>9.</td>
<td>If you would like to add another employee, select Add Employee. If you'd like to remove an existing employee, select Remove.

For this example, we will add another employee. Follow steps above.</td>
<td>
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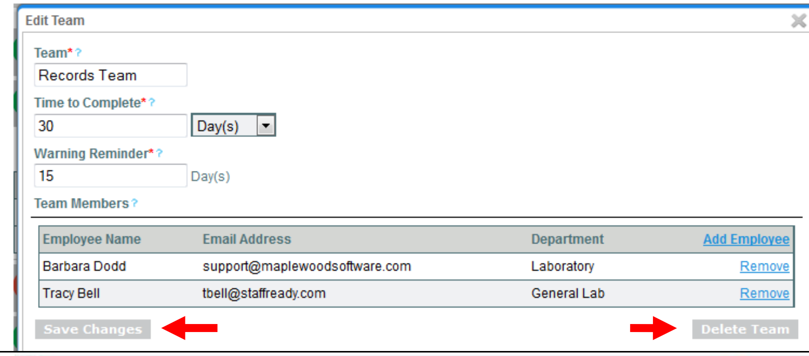
<td>10.</td>
<td>The Delete Team option allows the Admin to delete this team only if no tasks have been assigned to the team and the color of the bar is dark gray.

Once tasks have been assigned, the color of the bar will be light gray and you will not be able to delete the team.

When you have finished building your team, select Save Changes.</td>
<td>
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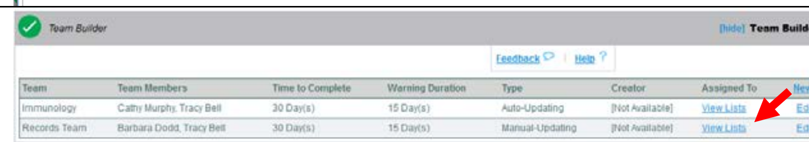
<td>11.</td>
<td>Upon saving changes, the Admin is taken back to the Team Builder color bar.

Select <u>View Lists</u> for the Records Team.</td>
<td>
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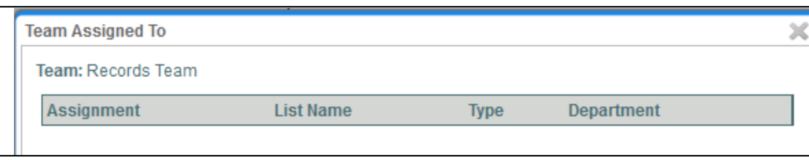
<td>12.</td>
<td>As tasks are assigned to the Team, they will be shown on this list. At this time, no tasks have been assigned to this team.</td>
<td>
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