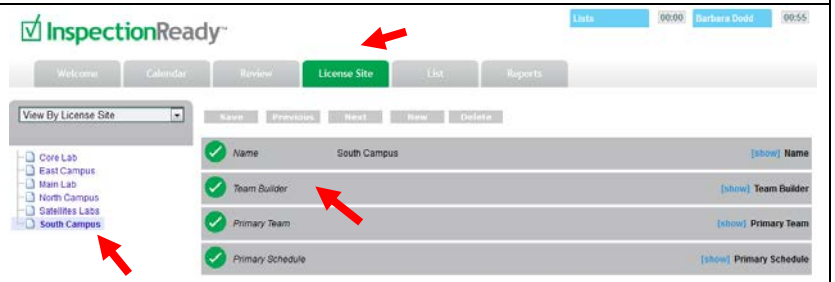
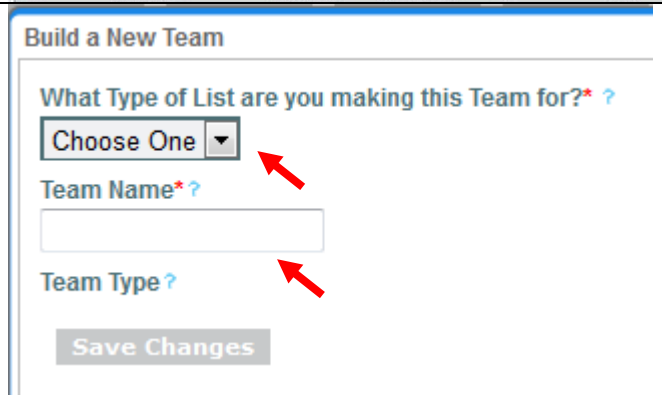
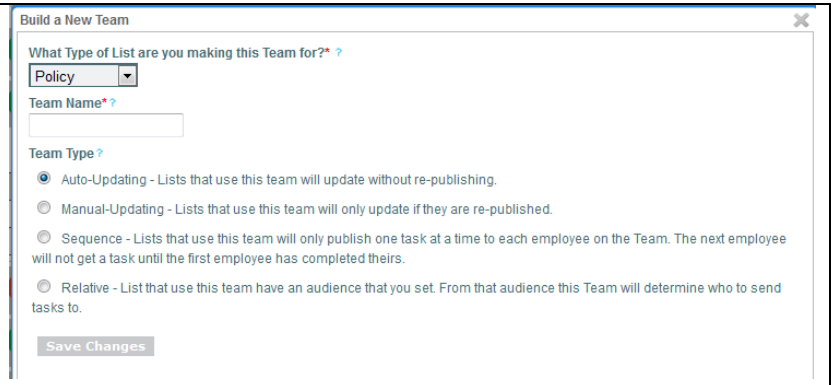
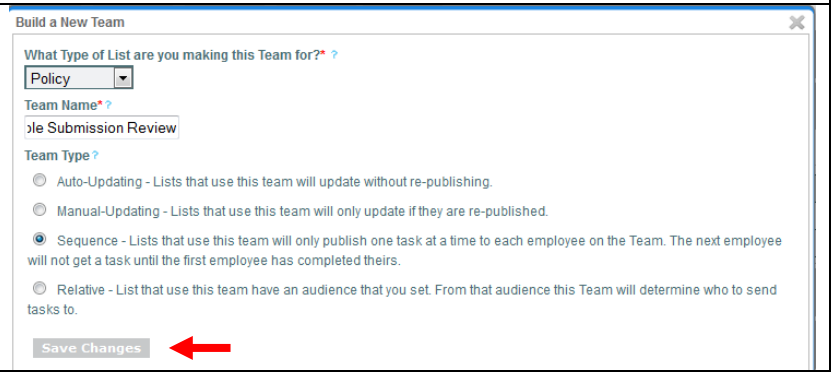
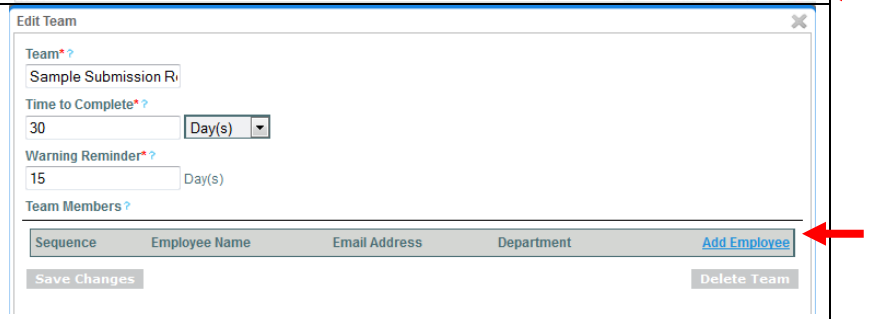
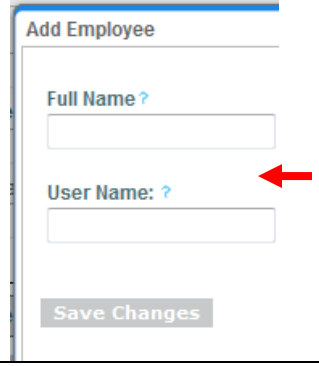
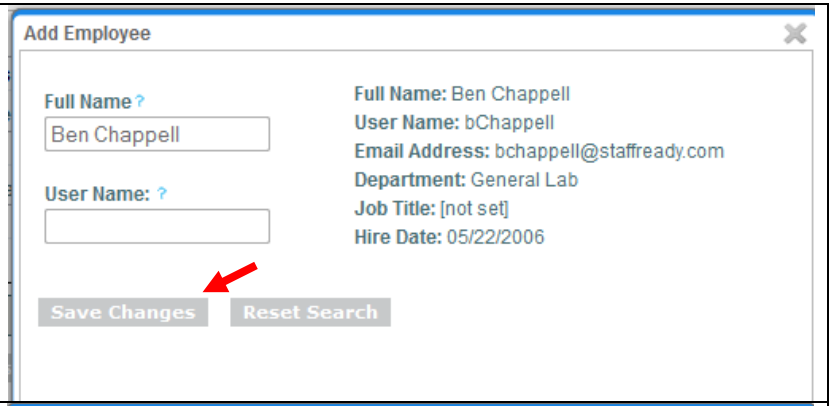
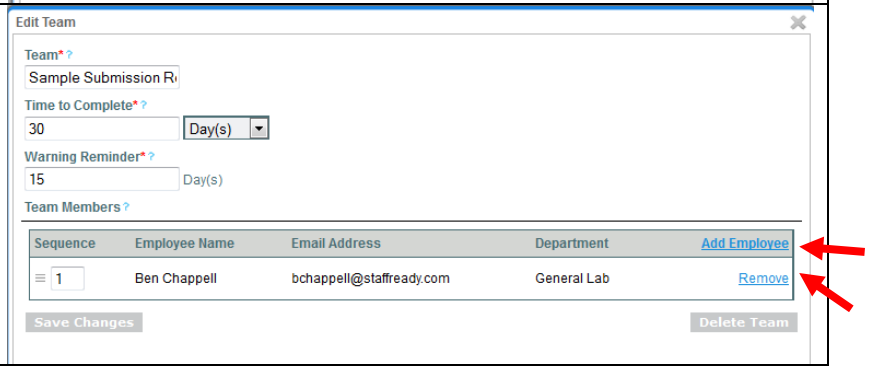
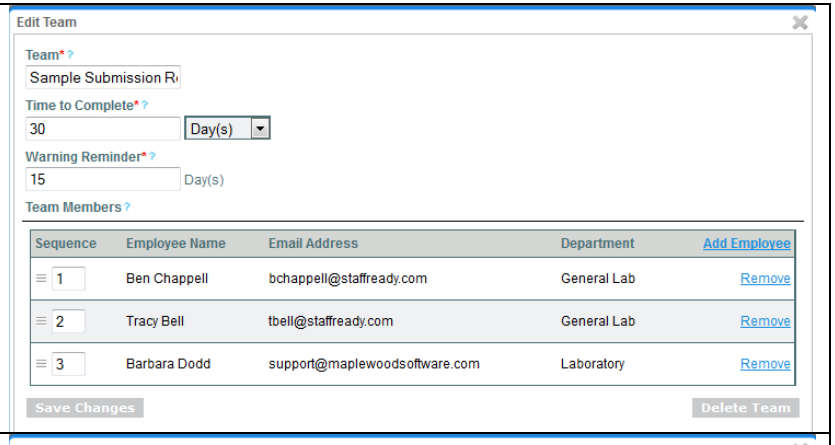
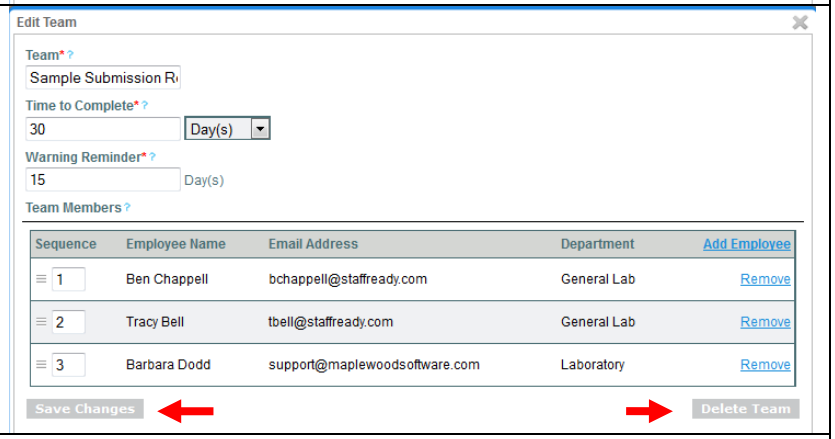
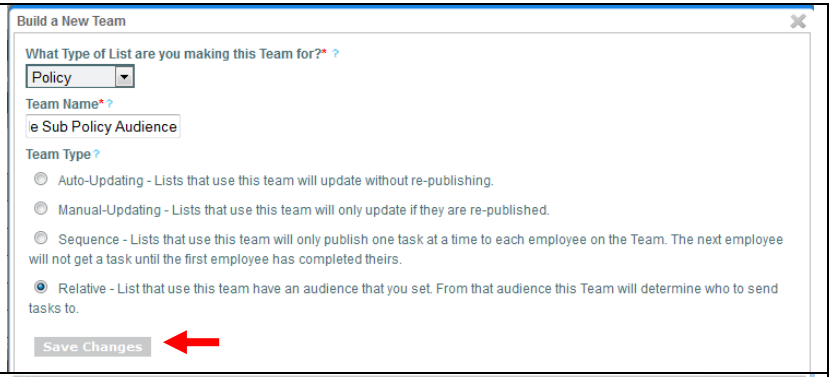
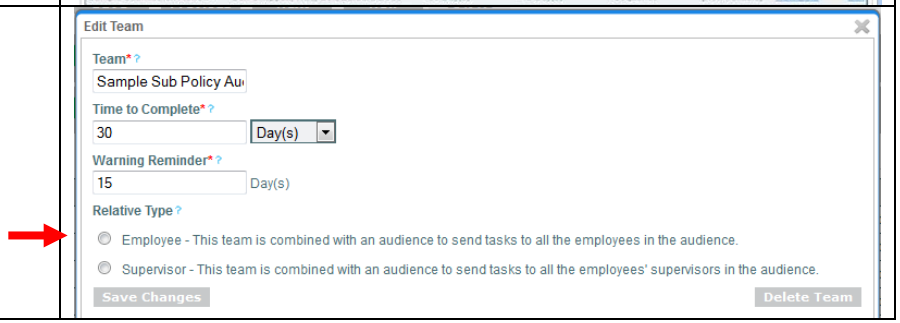
Team Builder – Policy		
Step	**Action**	
1.	Navigate to the **License Site Tab.** Select the **Team Builder** color bar. This is where you will create <u>all</u> the teams that will be used within your License Site. For this example, we will be working in the South Campus License Site. Expand the **Team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

4.	When choosing Policy, 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. Auto-Updating: When new members are added to this team, they will receive any tasks that have not yet been completed. Manual-Updating: When new members are added to this team, they will not receive any past tasks that have not been completed, only future tasks. Sequence: Tasks will be published out in the order you specify. Relative: Determines how an audience is used to determine who will get tasks assigned to them. For this example, we will use two types: first the Sequence type for the Revision and Review of the Policy, and secondly, the Audience for Distribution of the final Policy.	
5.	Select **Save Changes.**	

6.	Select Edit for the Sample Submission Review.	
7.	Time to Complete: 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. Warning Reminder: 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.	
8.	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.	

9.	Select **Save Changes.**	
10.	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 two more employees. Follow steps above.	

11.	This sequence shows that once Published, Ben Chappell will work on the revisions first, then it will be sent to Tracy Bell, and lastly to Barbara Dodd. You may change the sequence by placing your mouse over the name and moving it up or down.	
12.	Notice the Delete Team option. You may 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.**	
13.	Above we have built a team using the Sequence Type, now we will build a team using the Relative Type. Follow Steps 1-3 and we will continue from there.	

14.	We have selected Policy, and named this team Sample Sub Policy Audience. The Team Type is Relative. Select **Save Changes.**	
15.	Select Edit for Sample Sub Policy Audience.	
16.	The Relative Type determines how an audience is used to determine who will get tasks assigned to them. We will select Employee. Select **Save Changes.**	

17.	You are now back to the color bar. Select View Lists for the Records Team.	
18.	View Lists: As the team is assigned tasks, they will be shown on this list. At this time, no tasks have been assigned to this team.