Teams

Contents

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Chapter

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Teams Accessed from Specific Modules

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Overview

About Team Members

A team is a group of individuals who will complete a specified task. You can add both APM users and non-APM users to a team.

- APM users will have an existing Security User record and an associated Human Resource record that was created automatically when the Security User record was created.
- Non-APM users will not yet have a Security User record or a Human Resource Record. When you add a non-APM user to a team, you are actually creating a new Human Resource record for that team member.

   Note: A Security User record is required to log in to APM. Team members who do not have Security User accounts may participate in and contribute to the teams of which they are members, but will not be able to use the application. While non-APM users can be assigned a team role, the security privileges described in this documentation apply only to APM users.

Members of a team can also be assigned a role within the team, which indicates the types of tasks for which that team member is responsible.

About Team Member Roles

In Root Cause Analysis, Hazards Analysis, and SIS Management, you can assign team member roles to identify which team member is responsible for a given task related to a particular analysis. The following descriptions of roles assume that the user has full privileges to all families in the given module.

- **Principal Analyst:** The user who is responsible for facilitating and coordinating the analysis. The user who completes the initial steps required for an analysis is automatically designated the Principal Analyst by default. You can designate a different member as the Principal Analyst if needed.
   For a given analysis, the Principal Analyst can view, modify, copy, delete, publish, and unpublish an analysis.

   Note: No user, including the Principal Analyst, can modify a published analysis. If needed, the Principal Analyst can unpublish the analysis, modify, it, and then republish it.
- **Process Owner:** The team member who is responsible for managing the analysis and seeing it through to completion. After you assign a team member the role of Process Owner, that team member's name will appear in the Analysis Owner field in the analysis record.
   There can be only one Process Owner per analysis. However, a team member can be designated as both the Process Owner and Facilitator.
- **Facilitator:** The team member who is in charge of conducting the analysis and organizing the analysis team.
   There can be only one Facilitator per analysis. However, a team member can be designated as both the Facilitator and Process Owner.
- **Analysis Team Member:** Any user who is a member of an analysis team, and can perform most functions related to the analysis.
- **Viewer:** Any user who can only view the analysis after it has been published.

Tip: Refer to a specific module's documentation for details on which roles are used within each module.

# Manage Teams

View the Details for a Team Member

Procedure

1. Access the **Team Members** section for the team whose members you want to view.

   Hint: Refer to a specific module's documentation for details on how to access this section.

   A list of the users assigned to the team appears.

2. Select a user.
   The Human Resource record for the user appears. You can modify this information if necessary.

Add a Team Member

When you add a new team member, you can add a user with an existing Human Resource record, or you can create a Human Resource record for the user at the same time that you add him or her to the team.

Procedure

1. Access the **Team Members** section for the team to which you want to add a user.

   Hint: Refer to a specific module's documentation for details on how to access this section.

   A list of users assigned to the team appears.

2. At the top of the section, select .
   On the left side of the section, a list of the Human Resource records in the APM database appears. On the right side of the section, any users already assigned to the team appear.

3. If a Human Resource record already exists for the user that you want to add to the team, on the left side of the section, select the Human Resource record, and then select .

   If a Human Resource record does not already exist for the user that you want to add to the team:

   a) On the right side of the section, select .
      A blank datasheet for a Human Resource record appears.
   b) As needed, enter values in the available fields.
   c) Select **Add Team Member**.

   The user represented by the Human Resource record is added to the team.

Assign a Role to a Team Member

In Root Cause Analysis, Hazards Analysis, and SIS Management, you can assign team member roles to identify which team member is responsible for a given task related to a particular analysis.

Procedure

1. Access the **Team Members** section for the team within which you want to assign a role.
   A list of users assigned to the team appears.

2. In the row for a user, select the value in the **Role** column.
   A drop-down list appears, containing the possible roles you can assign to the user.

3. Select the role that you want to assign.

Note: The Principal Analyst, Process Owner, and Facilitator roles can be assigned to only one team member at a time. If you want to assign a user to the Process Owner or Facilitator role, the role will be removed from the currently assigned user. However, if you want to assign a user to the Principle Analyst role, you must first assign the current Principle Analyst to a different role.

4. Select 💾.

   The team member is assigned the selected role, and the **Owner** field on the analysis datasheet is populated with the name of the team member you selected for that role.

Remove a Team Member

When you remove a user from a team, you are deleting the link between the Human Resource record and the record with which it was associated. The Human Resource record itself is not deleted. Additionally, if you remove a team member who is assigned the role of Process Owner, the Owner field in the associated record will be cleared.

Procedure

1. Access the **Team Members** section for the team from which you want to remove a user.

   Hint: Refer to a specific module's documentation for details on how to access this section.

   A list of users assigned to the team appears.

2. At the top of the section, select ✏️ .

   On the left side of the section, a list of the Human Resource records in the APM database appears. On the right side of the section, any users already assigned to the team appear.

3. On the right side of the section, select the user that you want to remove.

4. Select 🔙.

   The user is removed from the team.

Chapter

2

Teams Accessed from Tools Navigation Menu

Topics:

Overview

About Teams

A team is a group of people in an organization that is responsible to complete a specific task. You can add both APM users and non-APM users to a team.
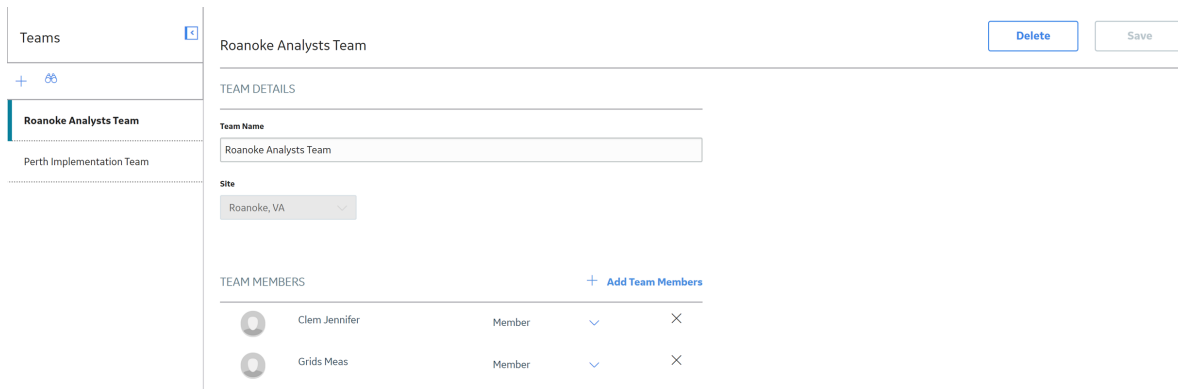
Teams are used in the following modules in APM:

- Rounds
- Operations

Access the Teams Page

Procedure

In the module navigation menu, select **Tools** > **Teams**.
The **Teams** page appears, displaying the available teams in the pane.

Team Members

About Team Members

Team members are individuals, who work closely to:

- Complete tasks assigned to them.
- Achieve the common goal assigned to the team.

In APM, you can add both APM users and non-APM users to a team.
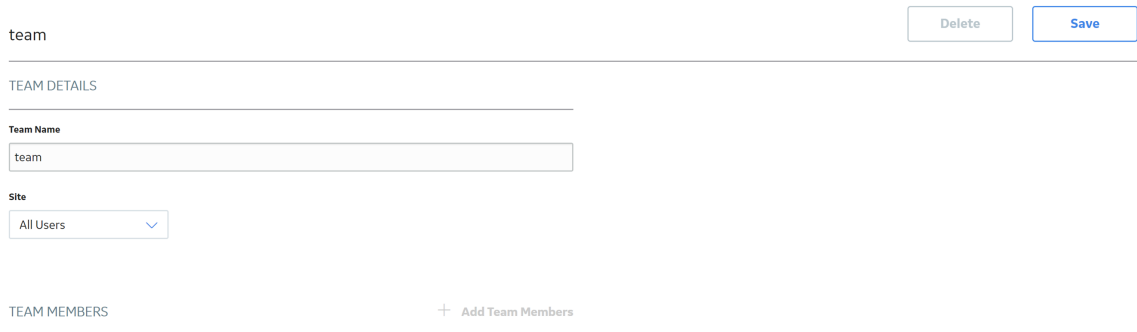
- APM user: Any user who has an existing Security User record, and an associated Human Resource record that was created automatically when the Security User record was created. The APM users belong to specific sites.
- Non-APM user: Any user who does not have a Security User record but has a Human Resource record.

Note: A Security User record is required to log in to APM. Team members who do not have Security User records may participate in and contribute to the teams in which they are members, but they cannot access the application. While non-APM users can be assigned specific responsibilities within a team, the security privileges configured for the other APM users are not applicable to them.

Create a Team

Procedure

1. Access the **Teams** page.
2. In the pane that displays the list of teams, select ✛.
   The workspace for a new team appears.

team	Delete	Save

TEAM DETAILS

Team Name

team

Site

All Users ⌄

TEAM MEMBERS   +   Add Team Members

3. In the **Team Name** box, enter a name for the new team.
4. In the **Site** drop-down list box, select a site.
   All the APM users assigned to the selected site appear in the **Add Team Members** window.

   Note: If you select **All Users** in the **Site** drop-down list box, all users including the Human Resource users and the Security Users appear in the **Add Team Members** window.
5. Select **Save**.
   The Team is created, and the **Add Team Members** link is enabled.
6. Select **Add Team Members**.
   The **Add Team Members** window appears.

Add Team Members

		1 Selected	☌→		☌
☐	👤	Noitalovitch, Leo			
☑	👤	Nozitawski, Leonard		No Data to Display	

Cancel   Save

7. Select the check box next to each user that you want to include in the team, and then select ⬚→.
The added users appear in the **Add Team Members** window.

   Note: If you do not want to include a user from the list of the added users to the team, select the user, and then select ←⬚.

8. Select **Save**.
The added team members appear in the **TEAM MEMBERS** section.

9. Select **Save**.

Add Members to a Team

Before You Begin

*   Create a Team.

Procedure

1. Access the **Teams** page.
2. In the pane that displays the list of teams, select the team to which you want to add the team members.
    The workspace for the selected team appears.

3. In the **TEAM MEMBERS** section, select **Add Team Members**.
    The **Add Team Members** window appears.

Add Team Members

🔭 1 Selected 👤→	🔭 👤
☐ 👤 Noitalovitch, Leo ☑ 👤 Nozitawski, Leonard	No Data to Display

<div align="right">

Cancel   **Save**

</div>

4. Select the check box for each user that you want to include in the team, and then select 👥→.
   The added users appear in the **Add Team Members** window.

   Note: If you do not want to include a user from the list of the added users to the team, select the user, and then select ←👥.

5. Select **Save**.
   The added team members appear in the **TEAM MEMBERS** section.

6. Select **Save**.

Delete a Team

Procedure

1. Access the **Teams** page.
2. In the pane that displays the list of teams, select the team that you want to delete.
    The workspace for the selected team appears.

3. Select **Delete**.
    A message appears, asking you to confirm that you want to delete the team.
4. Select **Yes**.

Team Member Personas

About Team Member Persona

You can assign responsibilities to the team members based on the personas defined within a team. By default, the following personas exist within a team based on the tasks the team members perform:

-   **Owner**: The team member who is responsible for managing the team and providing support to the team members to achieve the common goal assigned to the team.
-   **Member**: Any user who is a member of a team and is responsible for completing an assigned task.
-   **Control Room Operator**: The team member who is responsible for monitoring the operations of a site.
-   **Shift Supervisor**: The team member who is responsible for supervising the team members of a shift.

Associate a Persona to a Team Member

Procedure

1. Access the **Teams** page.
2. In the pane that displays the list of teams, select the team to which the team member belongs.
   The workspace for the selected team appears.

3. In the **TEAM MEMBERS** section, select the drop-down arrow in the row for the team member, and then select the persona that you want to associate with the team member.
4. Select **Save**.
   The selected persona is associated with the team member.