Plan Teams (also includes Plan Team Tasks)

Revision History

Date	Revision	Change by	Revision #
08/02/17	Document Creation	Lori Gorman	V1
09/12/17	Removed references to cloning teams	Claudette Martin-Wus	V2
3/19/18	Further definition of process	Heather Volkomer	V3
4/11/22	Update BCIC access instructions	Lori Gorman	V4

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Summary

Process builders and Plan builders assign employees to their plan directly into teams. All employees should be assigned to a team (whether a process level team or a plan level team). Some employees may be assigned to multiple teams. Process level teams are assigned directly to a process and their information displays in the *Section 3.0: Process Dependencies* of the published plan. Plan level teams are built at a plan level and are **NOT** assigned to specific processes. Their information displays in *Section 4: Plan Teams and Tasks* in the published Plan. Organizations that choose to build at a Plan level are not able to view Process Teams. Organizations that choose to build at a Process level may view both process and Plan level teams. *Section 2.3.1: Telecommuting* displays those employees assigned to plan level teams and their relative VPN access (as defined in the employee records).

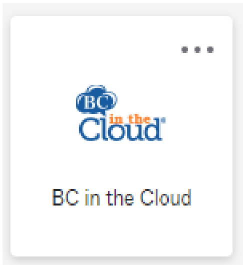
The chart below compares Plan vs. Process level teams.

Capability	Plan Level Teams	Process Level Teams
Team linked directly to a process	No	Yes
Team information displays in *Section 3.0: Process Dependencies* in the published plan	No	Yes
Team information displays in *Section 4.0: Plan Teams and Tasks*	Yes	No
Employees assigned to plan teams displays in *Section 2.3.1: Telecommuting* showing employee VPN access	Yes	Yes
Tasks assigned directly to the team	Yes	No- process teams refer to those tasks assigned directly to the Process
Users able to view/assign plan level teams	Yes	Yes
Users able to view/assign process level teams	No	Yes
Teams shared across the tool.	No- plan teams are only created within a plan and are not linked to any other tables with the plan. However, updating plan teams does update *Section 2.3.1: Telecommuting* in the published plan as this report is populated based on the plan teams.	Yes- Process teams may be assigned to multiple processes. When a process team is updated, the update is reflected everywhere that process team is referenced.

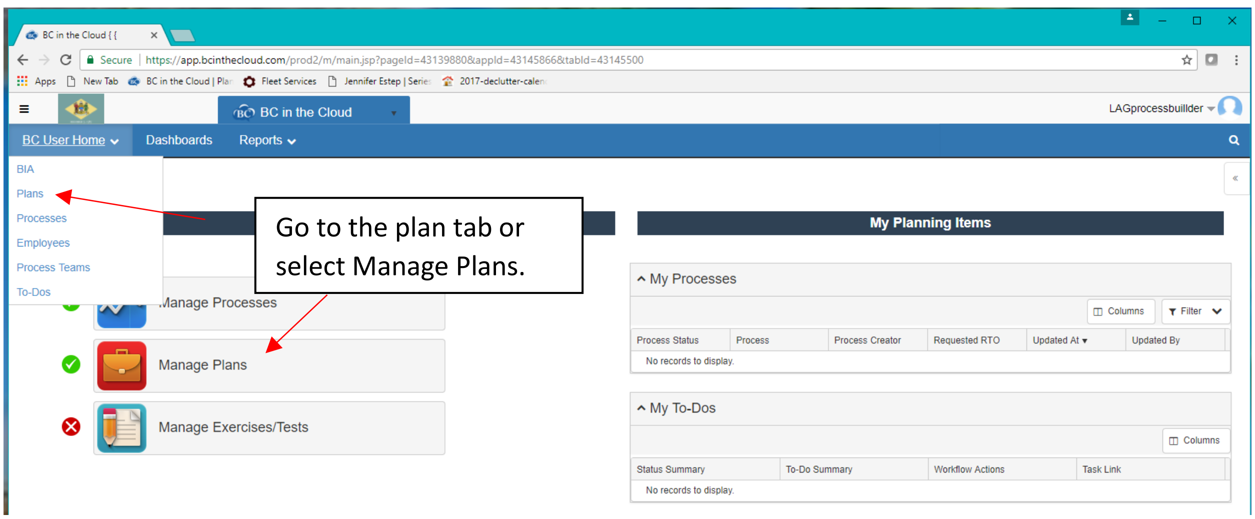
Accessing Plan - Teams Tab

Step 1. Log into the tool.

This application has been added to Delaware's SSO platform. Log into https://ID.Delaware.gov using your normal network credentials. Select the BCIC tile pictured below.

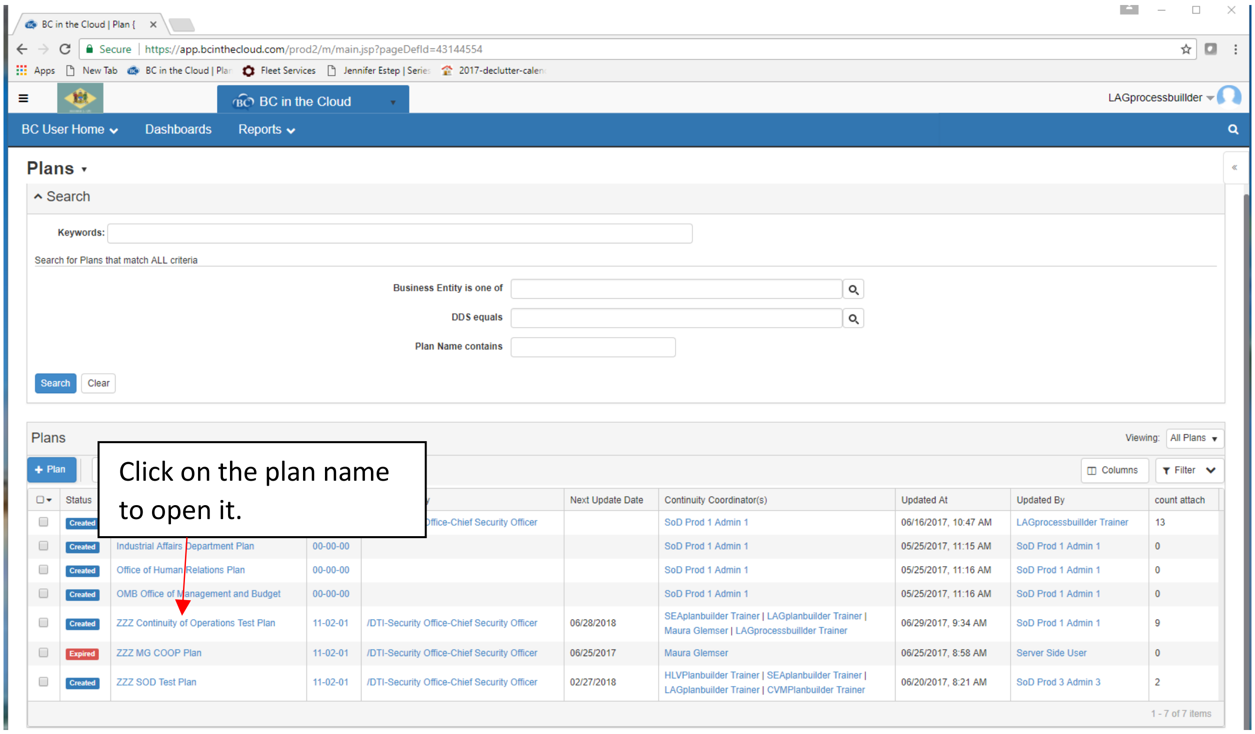


Step 2. Locate the Plan to be updated.

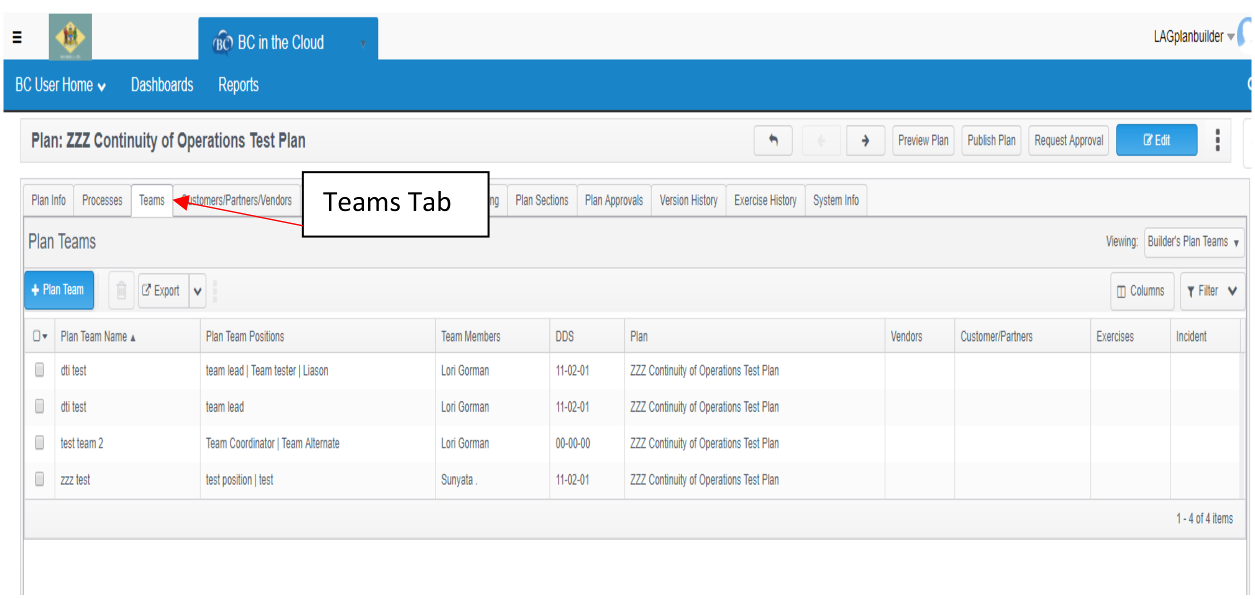


Step 3. Select the Plan you wish to update.

Select the plan you wish to update by clicking on the plan name.



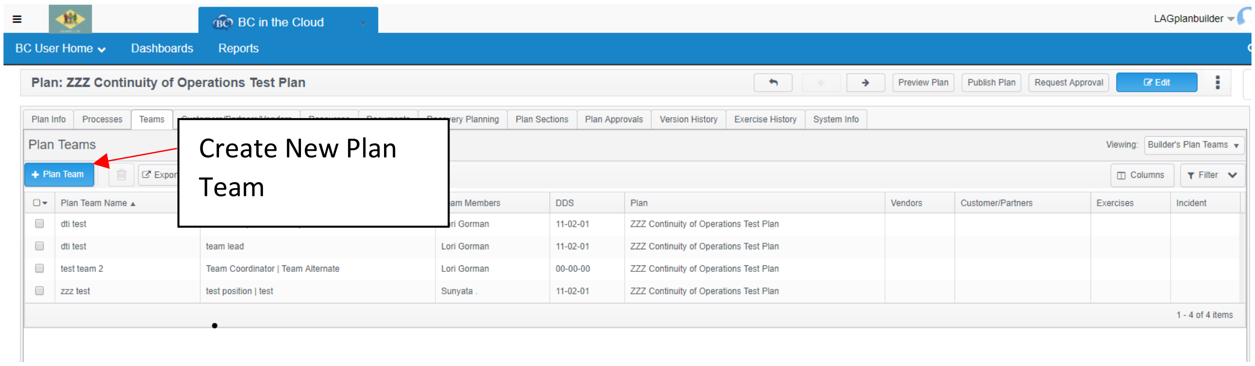
Step 4. Go to the Team Tab.



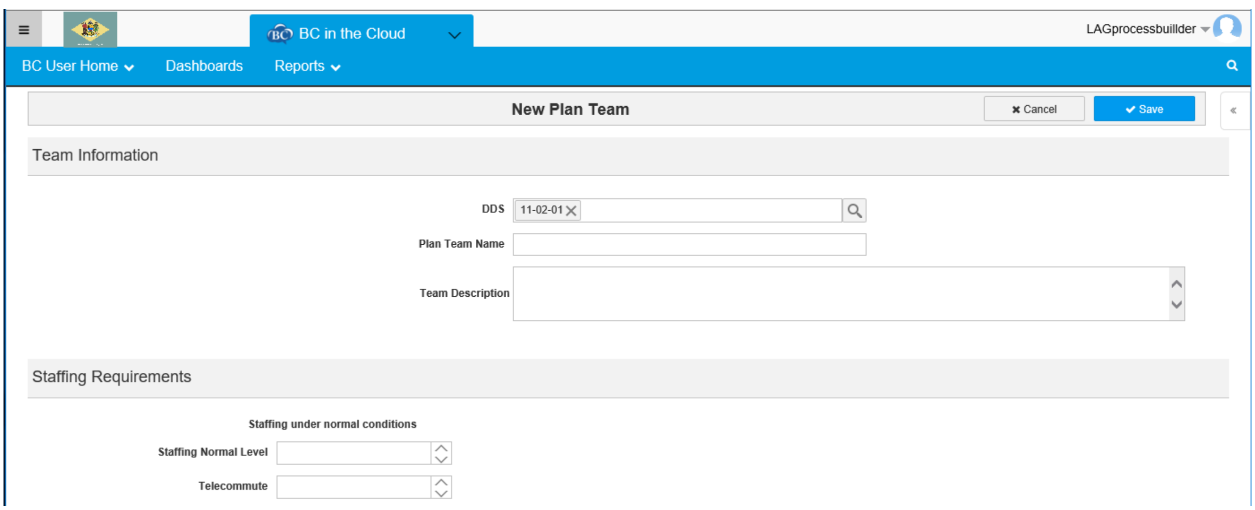
Creating a New Plan Team

Step 1. Click on the 

Team button.



Step 2. Assign the correct DDS, Team name, Team Description and staffing Requirements fields and click Save.

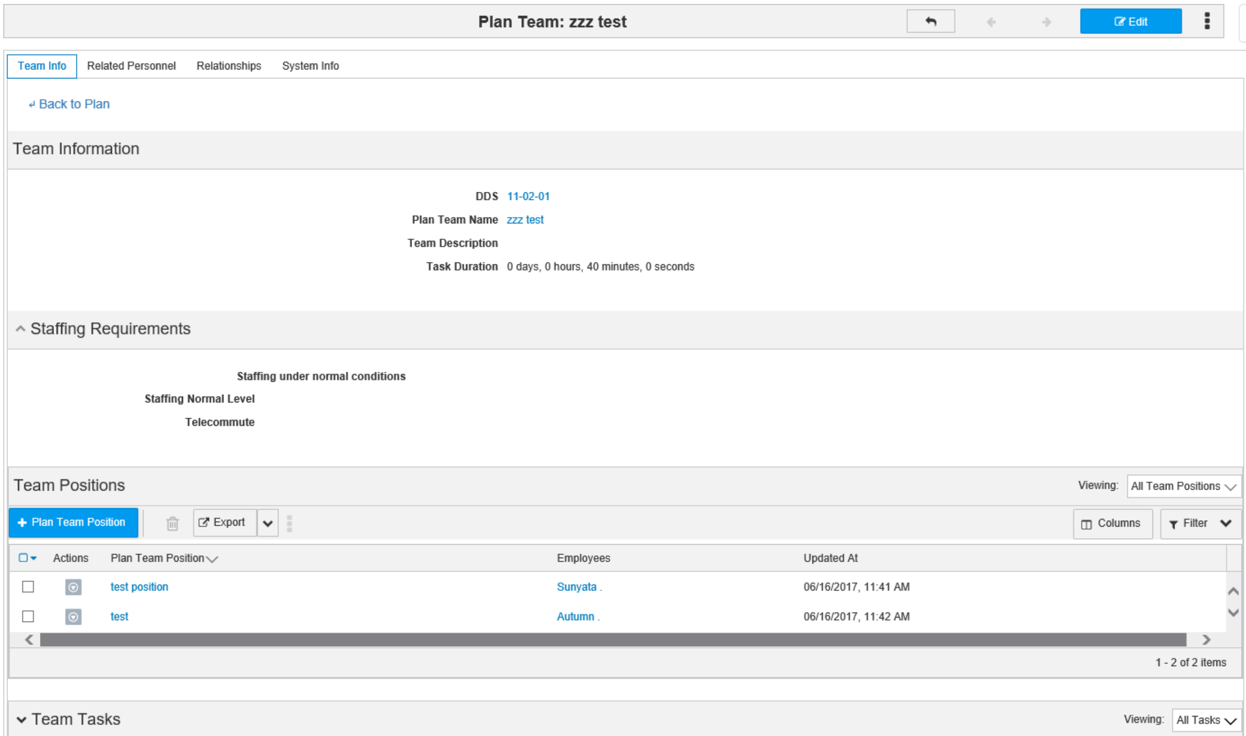


Step 3. Edit the Team to create Team positions and link employees.

See Editing a Team.

Editing a Plan Team

Step 1. View team details by clicking on the Plan Team Name. Here you can view the team information, staffing requirements, team positions, assigned employees, and the team tasks.



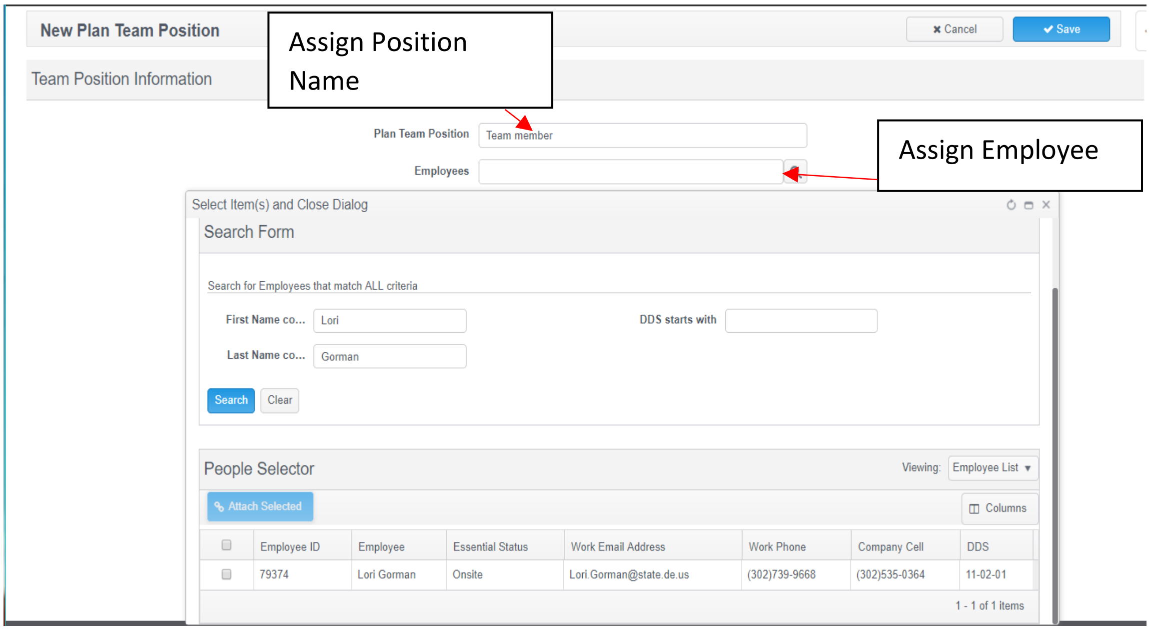
Step 2. Click edit to change Team Information or Staffing Requirements sections.

Add/Delete Plan Team Positions and Employee Assignments

Step 1. From the View Screen: Click on the 

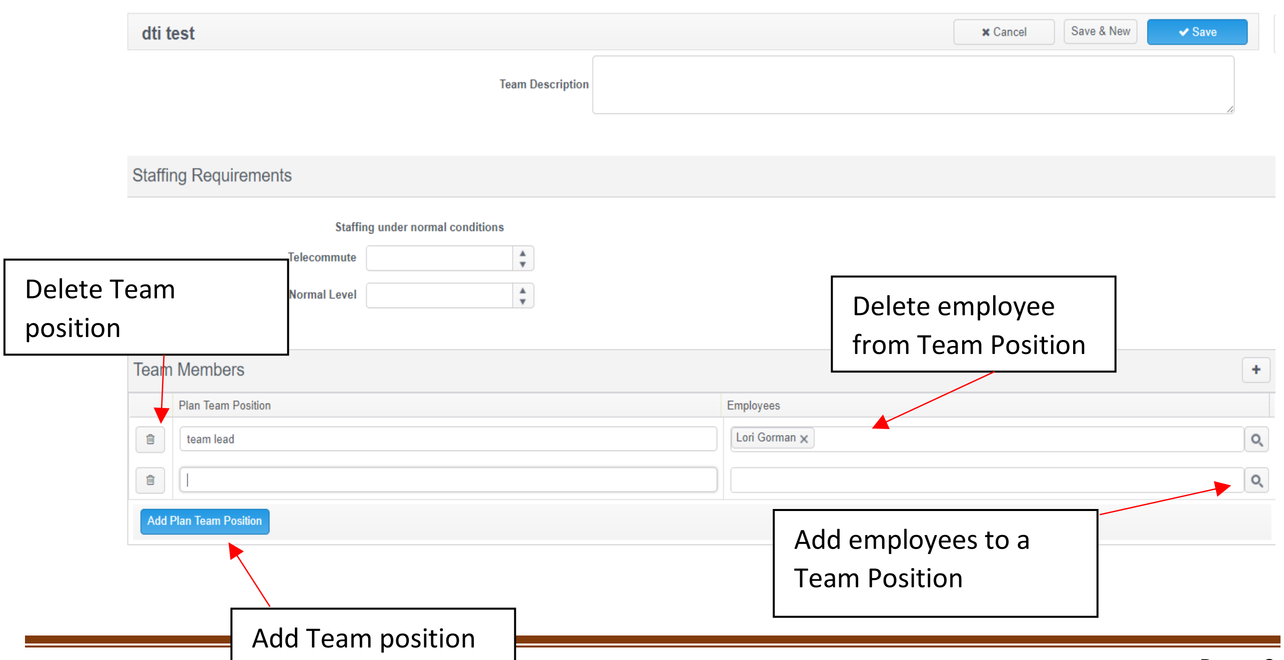
button.

- Enter the Plan Team Position name.
- Link employees by typing in the employee name or using the  icon.



When assigning an employee to the team position, you may use the "type ahead" option and begin typing an employee name. If multiple employees with the same name exist, you will need to use the  to determine the correct employee to link. The Search option will show employee ID, contact information and DDS for the employees.

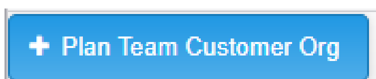
OR: From the Edit Screen



Adding Related Personnel to a Team

There are some cases in which a Plan Team may include individuals from outside the organization. For example, a Damage Assessment Team may include representatives from Facilities Management (Customer/Partner- state entity), property owners/landlord (Customer/Partner- non state entity), or Verizon (Vendor).

Step 1. Select the Related Personnel Tab.

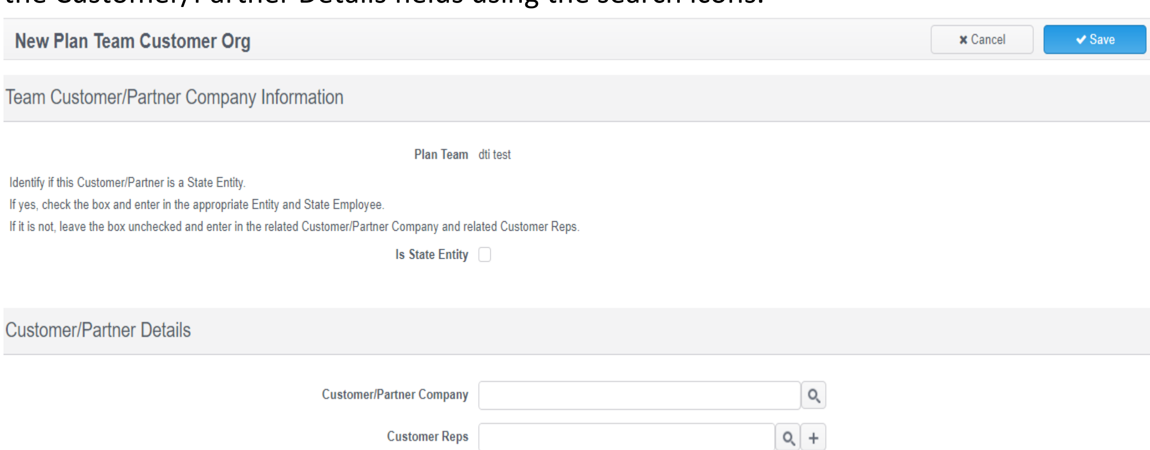
Step 2. Click on the 

button to link a Customer/Partner to your Team.

Step 3. Determine if the Customer/Partner is a State entity.

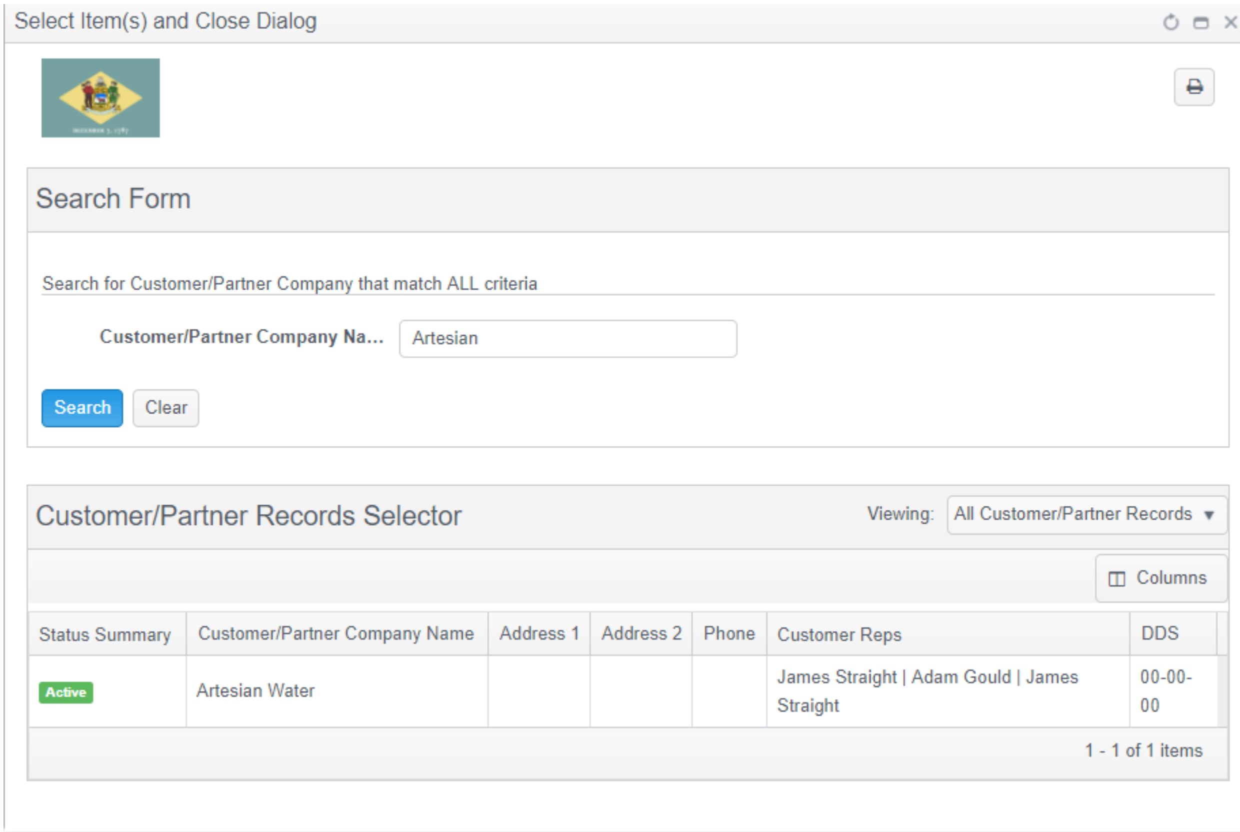
Non-State Entity

- If your Customer/Partner is not a State entity, select the appropriate information from the Customer/Partner Details fields using the search icons.

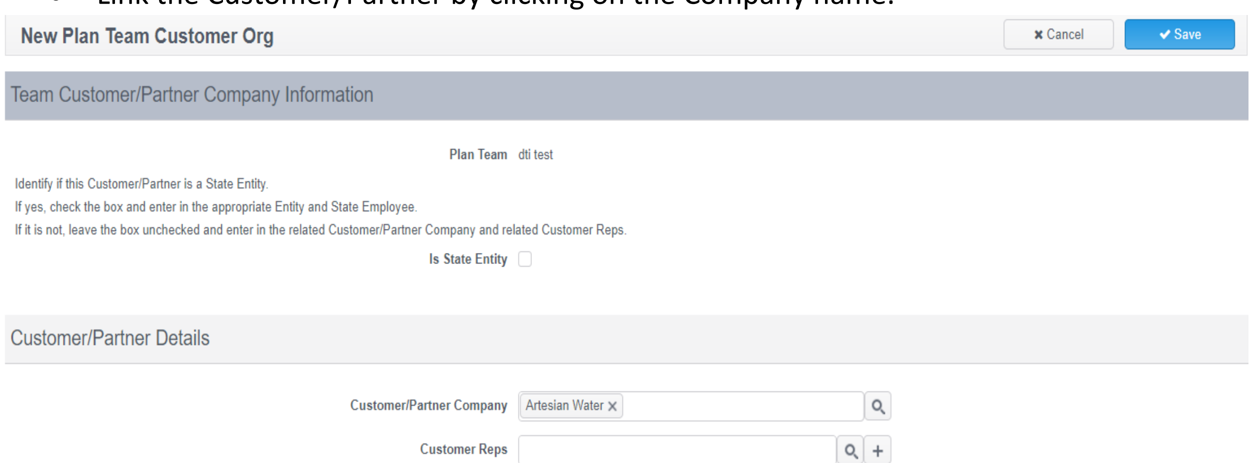


- Click on the  Icon beside Customer/Partner Company field.

- Using the Search Form, enter the Customer/Partner Company Name Contains field, and select Search.

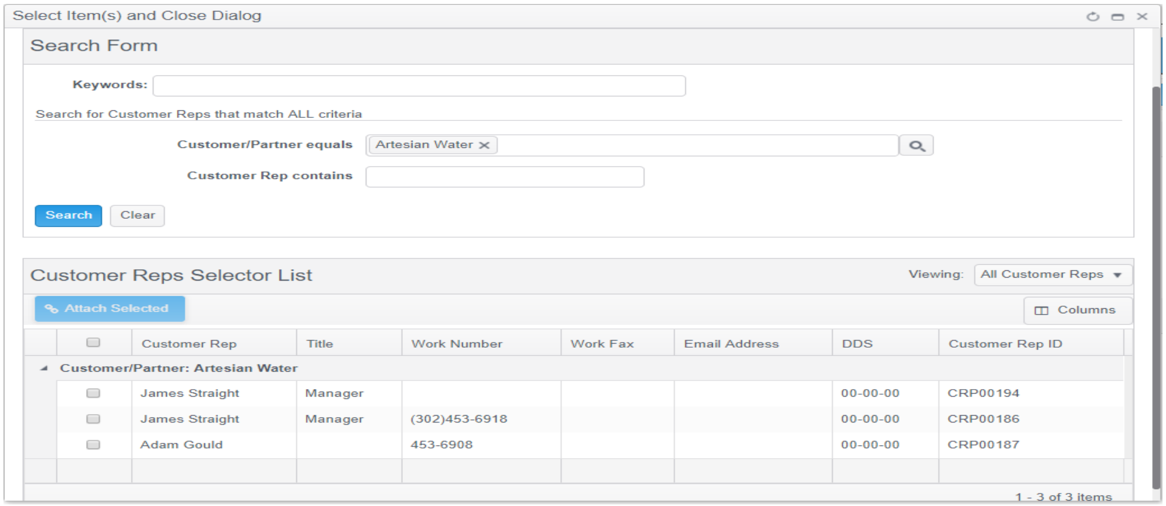


- Link the Customer/Partner by clicking on the Company name.



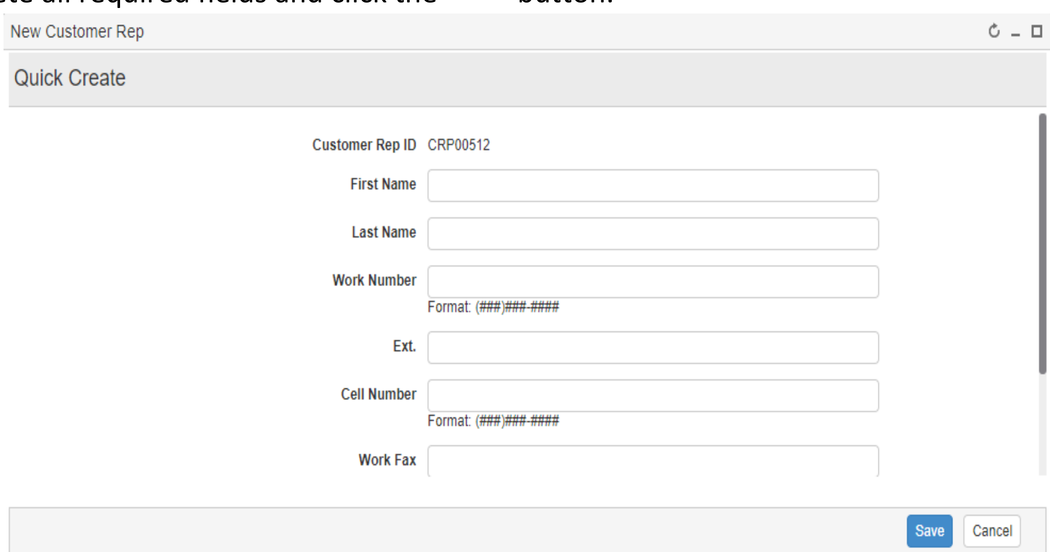
- Click on the Icon beside the Customer Reps field.

- Use the Search form to narrow the Customer Rep Search to those reps related to the Customer/Partner Company name. **This does not auto-populate based on the prior selection.**



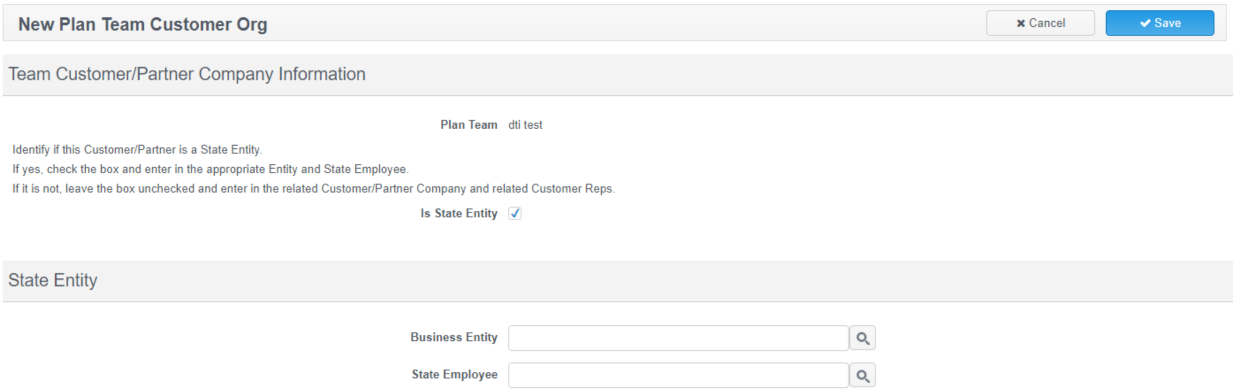
- If the desired Customer Rep is not available, close out of the search box and click on the  icon.
- Complete all required fields and click the 

button.



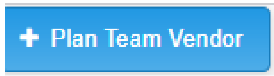
State Entity

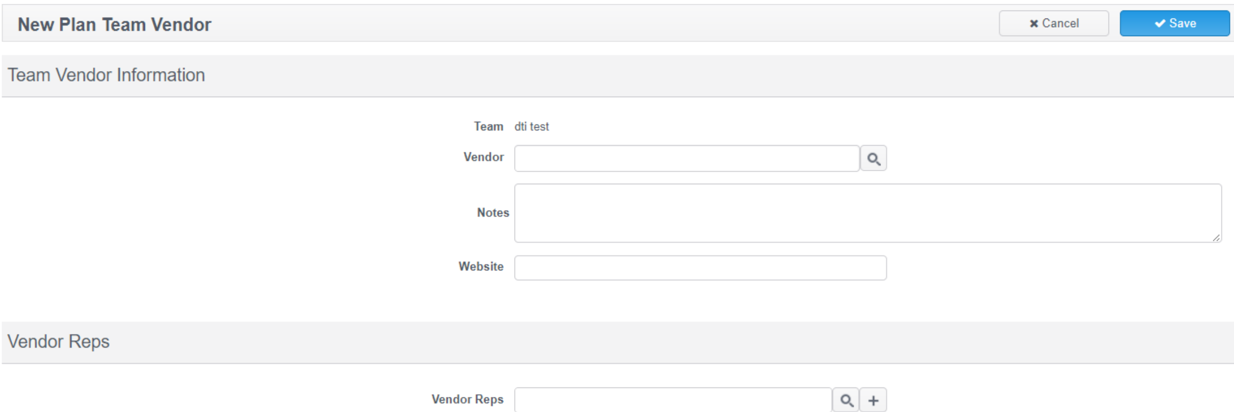
- If the Customer/Partner is a State Entity, click on the “Is State Entity” check box.   This will change the search fields below.



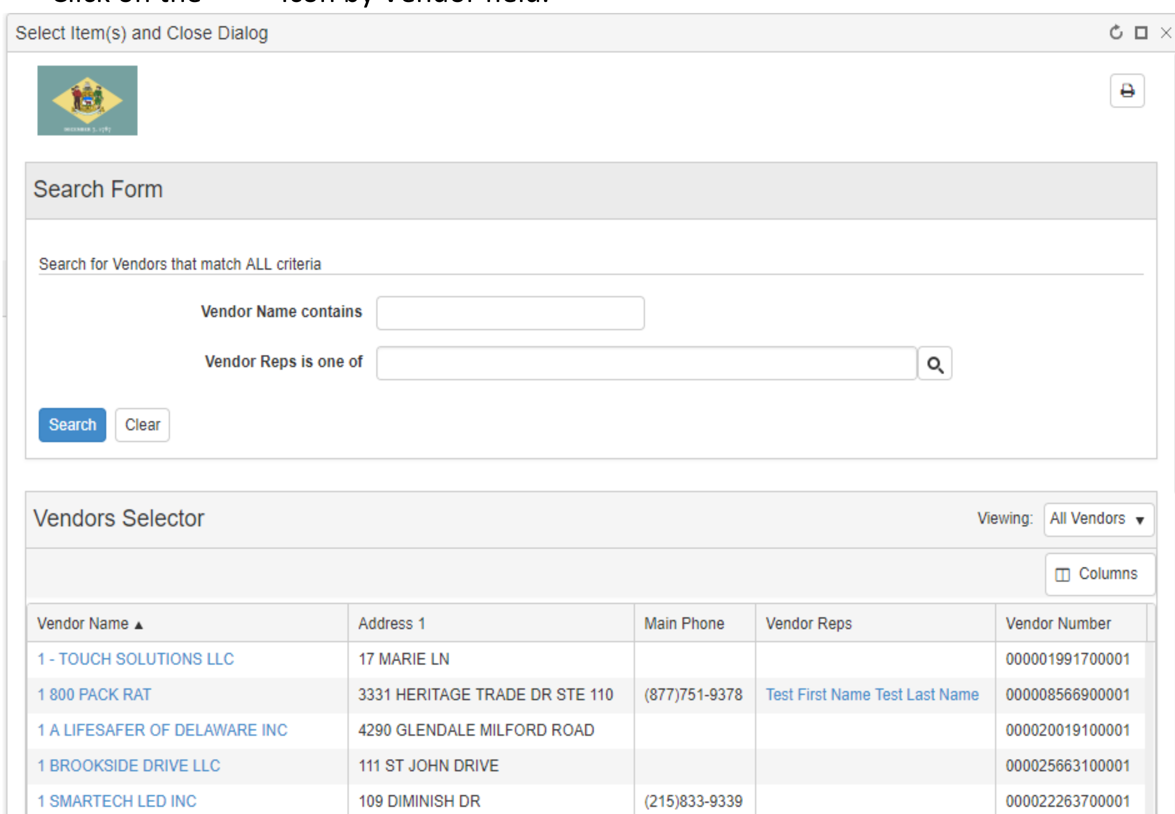
- Select the desired State Entity and State Employees by using the Search icons beside the fields.

  * Note: If you are unable to locate the correct State Entity, uncheck the State Entity box and search the Customer/Partners records.*

Step 4. Click on the  **button.**

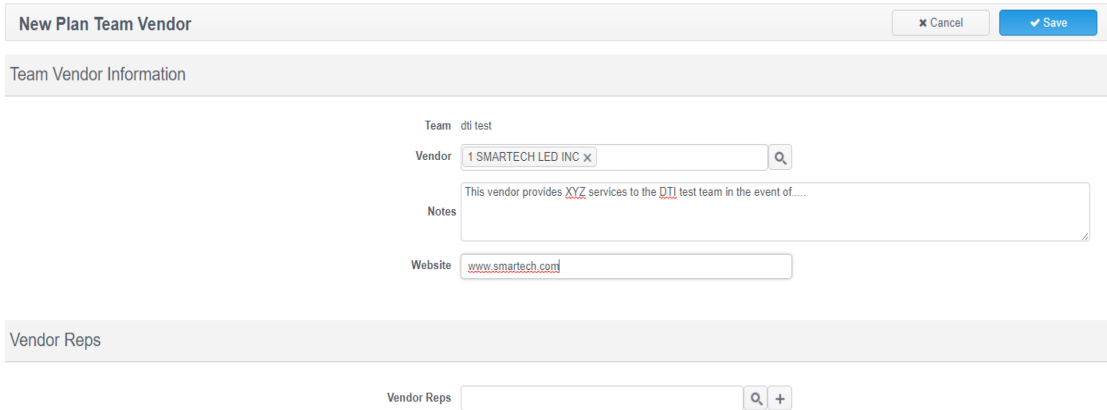


- Click on the  Icon by Vendor field.

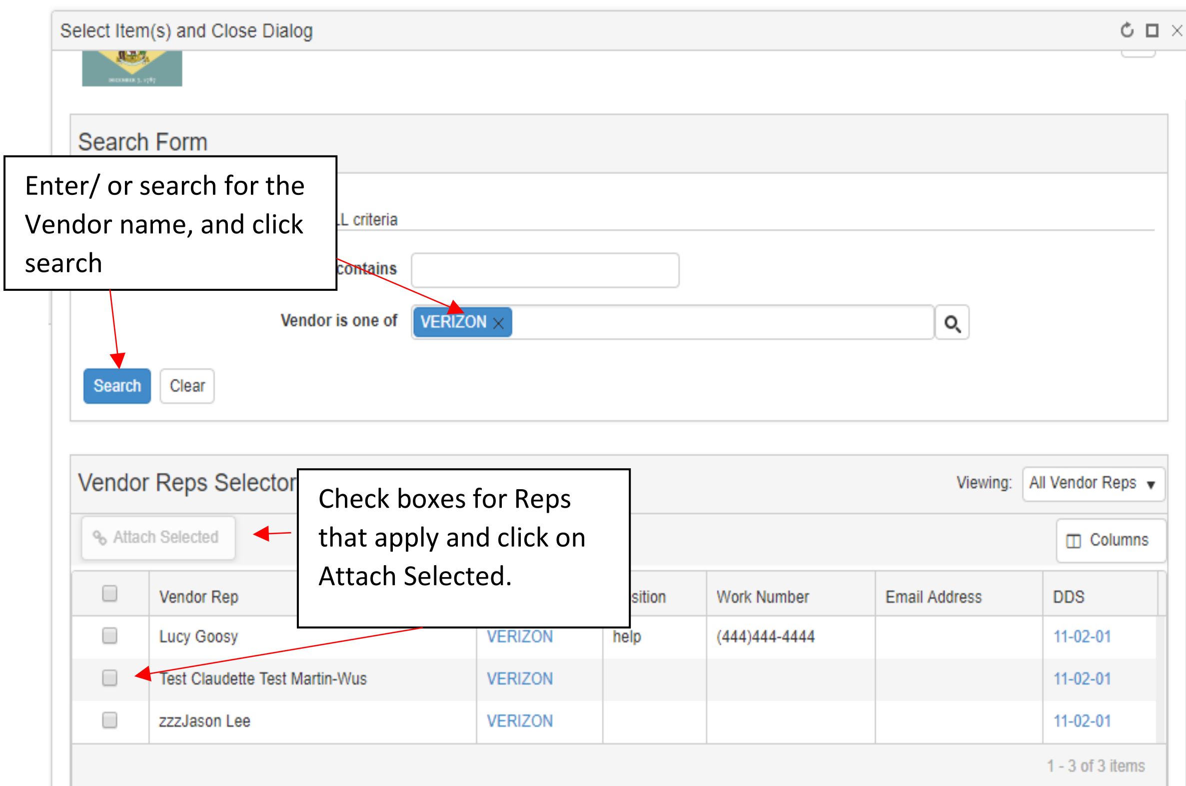


- Utilize the Search Form fields to locate the desired Vendor.

- Select the desired Vendor by clicking on the Vendor Name.
- Add any Notes or Website information specific to the Vendor for this team (this is plan specific data and does not show in other plans).



- Add a select Vendor Rep by clicking on the  Icon beside Vendor Reps field.
- Use the Search Form to narrow the search to vendor reps specific to the previously selected Vendor.

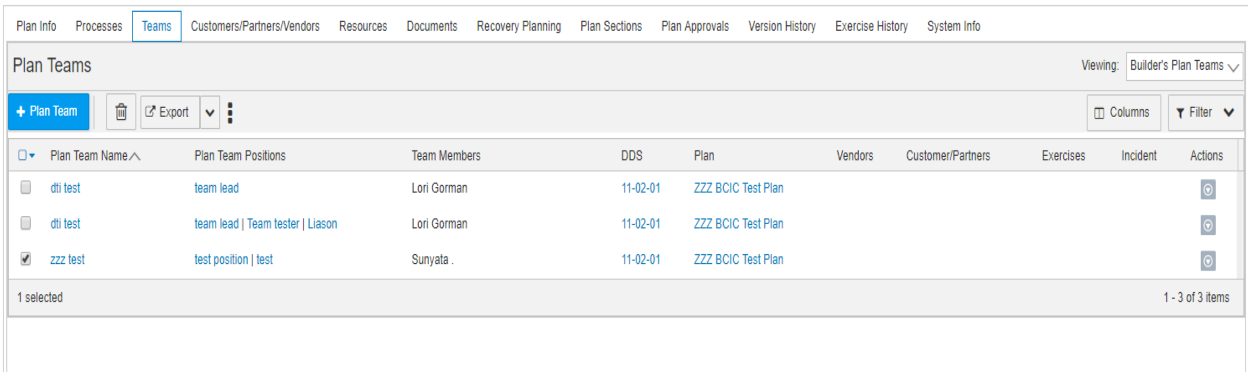


- Link Vendor Reps by placing a check mark in the boxes beside the desired names and clicking on the Attach Selected box.

Deleting a Plan Team

Plan teams are unique to each plan so deleting a plan team will remove it completely from the dictionary. You are only able to edit/delete plan teams that have been assigned your security DDS.

Step 1. From the Plan Teams Tab, check the box next to the team you wish to delete.



Step 2. Click on the Trash Can  **icon found on the actions menu bar.**

Plan Team Tasks

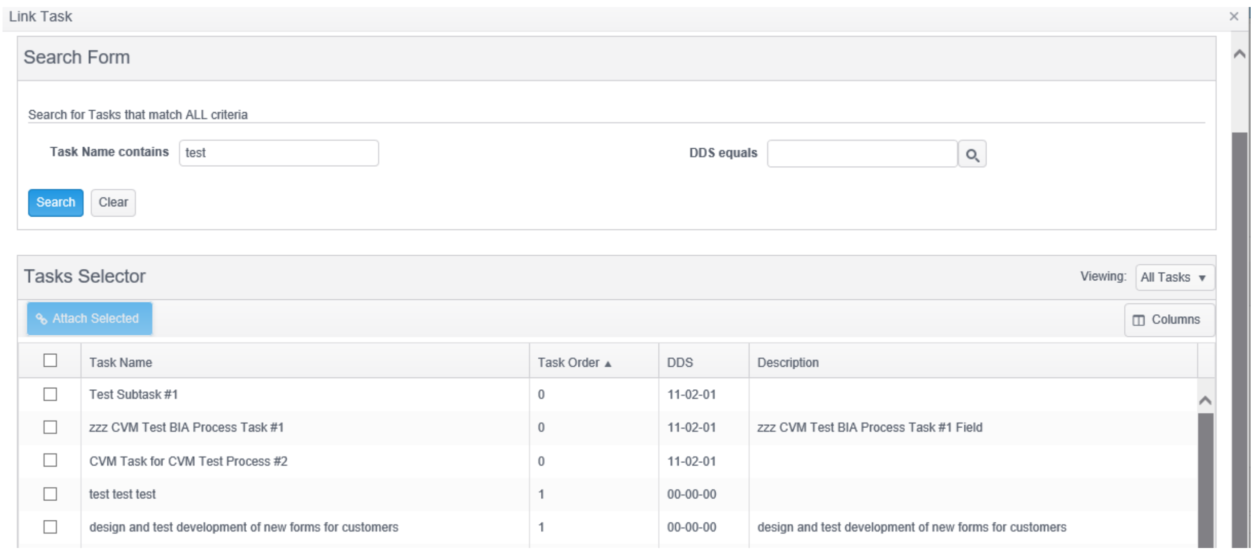
Plan teams may be assigned tasks that display in checklist format in *Section 4.0 Plan Teams and Tasks* of the published plan. These tasks are assigned to the team (rather than a specific team position).

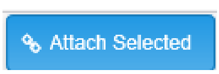
Linking a Plan Team Task

Step 1. From the Plan Team View screen of the desired team, select the 

button.

Step 2. Using the Search Form, locate your desired task by completing the Task Name contains field, or the DDS Equals field and clicking on the Search button. *Completing multiple fields requires all criteria to be valid in the search results and may limit your options*

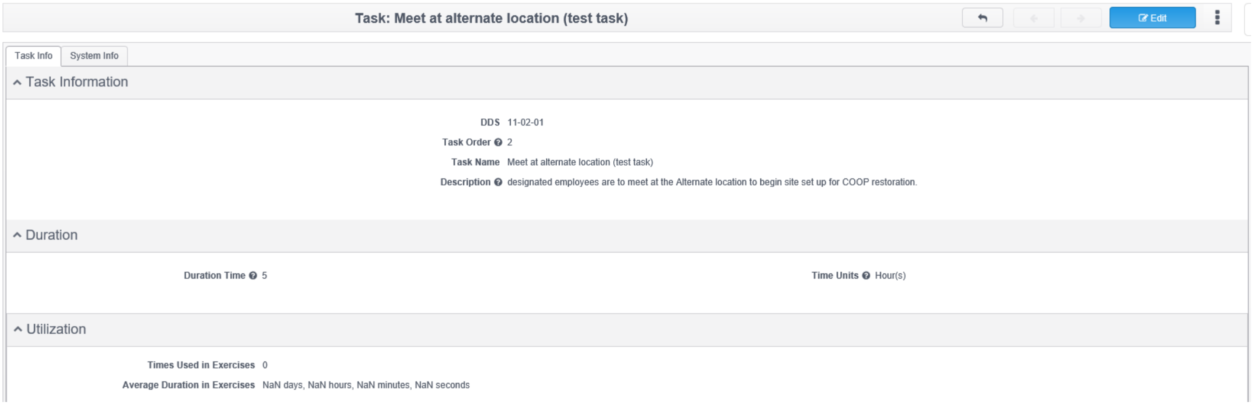


Once the desired task is located place a check next to the task name and click on the 

button.

Editing a Plan Team Task

Step 1. Select the Task Name you wish to edit. This will take you to the task details view screen.



You are only able to Edit tasks with your matching security DDS.

Step 2. Click on the 

button.

You may edit the task name, task description, task order, and Duration Time/ Time Units.

Removing a Plan Team Task

Step 1. Select the Actions drop-down and select 

.