GPS Collaborative Edition: Data Viewing Hierarchy Information

What are Teams?

The teams in Collaborative Edition are used for the allocation of records to create, update, utilize, and view within. Normally, these are associated with Sales Representatives and their Managers in the area of creating and/or managing Accounts, Contacts, Leads, Opportunities and Activities. However, the versatility of Collaborative Edition also allows for other types of users to assist in getting a deal closed-it is a mini-CRM system.

For example, a Sales Representative needs an Engineer to complete a specification document for a quote to an existing client. With Collaborative Edition, if the Engineer is also a user, he would have a task listed in his activities that the Sales Representative created for him to complete a specification document. When the task is complete, the Engineer can communicate that by making notes in the task and completing it.

Figure 1
Common Tab Areas Used in Collaborative Edition

The Sales Performance Author Content (Methodology) is incorporated as well. This allows a variety of teams to collaborate on an Account, perform a task or evaluate the Opportunity itself.

Defining your Teams

The Team concept is very important, as each Account, Contact, Lead, Opportunity, in your Org is assigned to a Team (and to only <u>one</u> Team), and may only be accessed by a member of the Team to which it is assigned.

For example, if you have a Global Team, a US Team, a Europe Team and an Asia Team then these would be your top teams in the hierarchy. The users within each of these major teams would have access to their own Accounts, Contacts, Leads and Opportunities assigned to that specific Team. If John Smith is a part of the US Team, he would only have rights to the Accounts etc, in the US Team.

Figure 2
Overview of Top Level Team Hierarchy

You should give a lot of thought to the definition of your Teams within an organization, as failure to define these correctly may mean that you have problems viewing / accessing / updating Accounts, Contacts, Leads, and Opportunities later.

All your data (Accounts, Contacts, Leads, Opportunities etc) will reference these Teams, and it is much easier to define a workable system prior to implementation time, than it is to edit all of those records at a later date.

Each user may belong to one or more Team. In **Figure 2**, for example, you could have your Engineering Team under the US Team also in the EU Team.

Default Installation Teams Information

Users are by default added during initial setup to a Team called "Global". This means that any Accounts / Contacts etc that are added and assigned to the Global Team will be available to all users.

Users are also set up with a default "Private" Team during the Org setup, with their username being the Private Team name.

Figure 3
Team/User Set Up

Collaborative Edition Orgs: Data Viewing Hierarchy Information

Understanding Users with Teams

Each User can have a Manager and Direct Reports as defined in the User Management screen. **Managers can view any record that their Direct Reports can view, regardless of their Team membership.**

Company Hierarchy

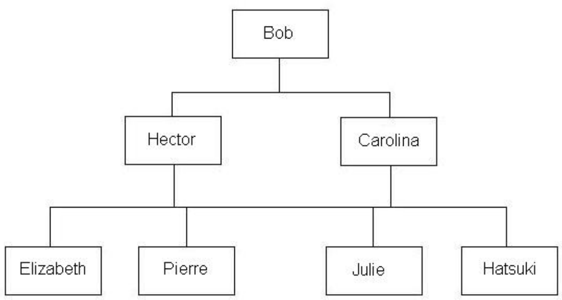

Figure 4
Standard Team Reporting Hierarchy for
US Division
XYZ Company

Teams are managed using the Team Management screen, accessible from the System Administration home page.

Figure 5
Team & User Management

Note that a user may be a member of more than one Team, and that you may create as many Teams as you like.

Every manager (or person with others either reporting to them in the hierarchy or whose data they need to see) needs a Team set up for themselves.

In Team Management a Team needs to select the name of the Team Manager, that can be anybody who is below them in the hierarchy and whose data needs to be visible as well the name of the person above the manager in the hierarchy.

To aid your understanding of the above please see the example setup below. In **Figure 5** we have Bob, a VP of Sales for the US Division for XYZ Company. Below Bob, Hector and Carol are his Regional Sales Managers, Hector is the West Coast Manager and Carolina is the East Coast Manager. Below each Manager, they have their direct report Sales Representatives.

Bob needs his complete US Team visible to him for both West and East Regions. So Bob needs a team whereby, all other people in the Organizational Chart will be a member.

Figure 6
Team and User Management Section

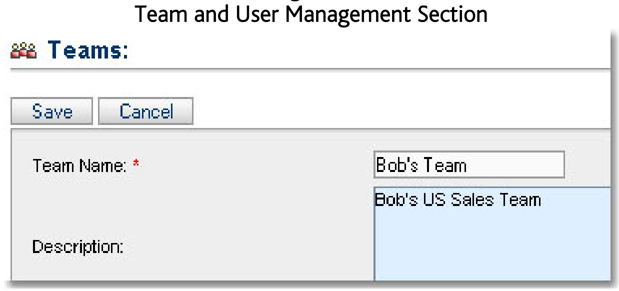

Figure 7
Team Creation Section

In order to set up Bob's Team

1. The System Administrator clicks on the Admin Tab
2. Clicks on "Create Team" in the Shortcuts menu
3. Types in "Bob's Team" and Description
4. Clicks the Save Button.

Then of course Hector needs his own team for just the West Coast and Carolina needs her own team for the East Coast, whereby their territory accounts and leads along with the opportunities have been defined in their Division of XYZ Company.

Figure 8
Regional Sales Manager in Team Creation

Collaborative Edition Orgs: Data Viewing Hierarchy Information

As mentioned previously, each User by default has his/her own team as well. This is a "Private" Team.

Off-line Client (Mobile Edition)
Users can only access Accounts and Opportunities in the Mobile edition that are actually assigned to their Private Team (not just to a Team that they can see)

In our example so far we have the following teams set up.

Private Teams	Other Organizational Teams
	Global Team
Bob	Bob's Team
Hector	Hector's Team
Carolina	Carolina's Team
Elizabeth	
Pierre	
Julie	
Hatsuki	

Table 1
Teams in Collaborative Edition

Currently everyone within the US Division is in the Global Team as well as having their own "Private Team". No-one has been reassigned to different teams or added to another team. Figure 9 shows the current Team List.

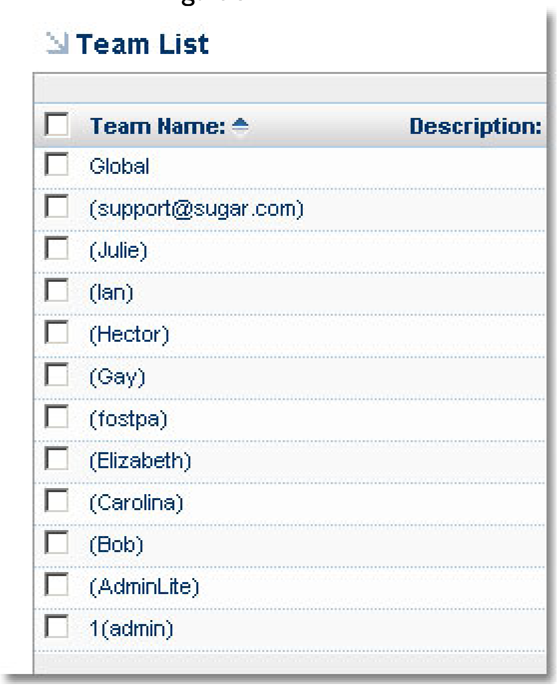

Figure 9
Team List: Collaborative Edition

Creating and Assigning Users to Teams
Within the same Admin section, an Administrator has the ability to assign Users to a variety of teams. There are two ways to add users to the Collaborative Edition Administrative Panel. If a list of Users has been created or exported from another CRM system, you may simply use the Import function to upload them.

Alternatively, if adding new users, it may be easier to add them one at a time if there are only a few.
Figure 10 shows adding Pierre as a user to the Team Edition.

Adding One User at a Time
1. Click in Short Cut Menu "Create User"
2. Scroll to right type in Name information and any other relevant information about the User.
3. Type in the Login "User name and password" as well.
4. Click Save.

Figure 10
Adding a User

Adding Users to Teams
In the Administrative Home Section, shown in Figure 6, an Administrator has two choices listed for managing users or teams. When the Administrator clicks on teams the Team List is shown as in Figure 9.

→ Scroll down to the User Section
→ Click on "Select"
→ Mouse over to the box next to the name and left mouse click. Once a box is checked the User is now a member of a team.

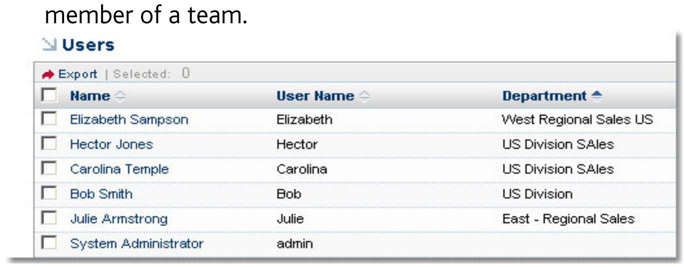

Figure 11.
Users

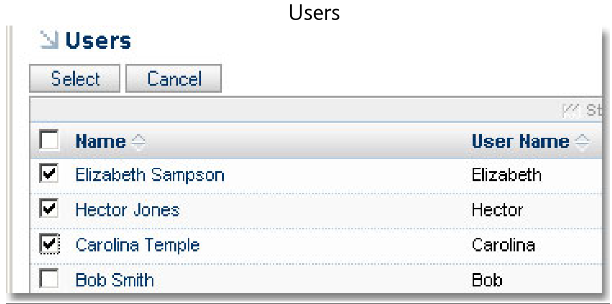

Figure 12.

Collaborative Edition Orgs: Data Viewing Hierarchy Information

In **Figure 12** the Administrator is adding the Users to Bob's Team. So overall, the Administrator adds a variety of individuals to different teams so that the Accounts, Opportunities, Leads and Contacts are associated with the specific Division and the West and East Regions. Table 2 shows the results of the team associations.

Private Teams	Global	Bob's Team	Hector's Team	Carolina's Team
Bob	Bob	Hector	Elizabeth	Julie
Hector	Hector	Hector's Team	Pierre	Hatsuki
Carolina	Carolina	Carolina		
Elizabeth	Elizabeth	Carolina's Team		
Pierre	Pierre			
Julie	Julie			
Hatsuki	Hatsuki			

Table 2
Users within Teams

Role Management and User Heirarchy

Every Collaborative Edition Org. has a Role set up called "Collaborative Edition User". You must edit this role and at the bottom select to add all your company's users (if they ever whish to share any global Contacts, Accounts or Opportunity information) Inside this role area is where you define the authorities for users who are assigned this role. **Table 3** shows our example of how Users and Teams and Role are associated in the Hierarchy of Collaborative Edition.

Users	Teams	Role
Bob	Bob's Team Hector's Team Carolina's Team Global Team Bob (Private)	Collaborative Edition User
Hector	Bob's Team Hector's Team Global Team Hector (Private)	Collaborative Edition User
Carolina	Bob'sTeam Carolina's Team Global Team Carolina (Private)	Collaborative Edition User
Elizabeth	Hector's Team Global Team Elizabeth's (Private)	Collaborative Edition User
Pierre	Hector's Team Global Team Pierre's (Private)	Collaborative Edition User
Julie	Carolina's Team Global Team Julie's (Private)	Collaborative Edition User
Hatsuki	Carolina's Team Global Team Hatsuki's (Private)	Collaborative Edition User

Table 4
Users/Teams and Roles

In order to view the components offered in Collaborative Edition and available to your users, you need to visit the Role area under Administration. If you are interested in more capabilities please contact your sales representative.

	Access	User Type	Delete	Edit	Export	Import	List	View
Accounts	Enabled	Normal	All	All	All	All	All	All
Bug Tracker	Disabled	Normal	All	All	All	All	All	All
Calls	Enabled	Normal	All	All	All	All	All	All
Campaigns	Disabled	Normal	All	All	All	All	All	All
Cases	Disabled	Normal	All	All	All	All	All	All
Contacts	Enabled	Normal	All	All	All	All	All	All
Contracts	Disabled	Normal	All	All	All	All	All	All
Documents	Disabled	Normal	All	All	All	All	All	All
Email Marketing	Disabled	Normal	All	All	All	All	All	All
Emails	Disabled	Normal	All	All	All	All	All	All
Email Templates	Disabled	Normal	All	All	All	All	All	All
Forecasts	Disabled	Normal	All	All	All	All	All	All
Leads	Enabled	Normal	All	All	All	All	All	All
Meetings	Enabled	Normal	All	All	All	All	All	All
Notes	Enabled	Normal	All	All	All	All	All	All
Opportunities	Enabled	Normal	All	All	All	All	All	All
Products	Disabled	Normal	All	All	All	All	All	All
Projects	Disabled	Normal	All	All	All	All	All	All
Project Tasks	Disabled	Normal	All	All	All	All	All	All
Target Lists	Disabled	Normal	All	All	All	All	All	All
Targets	Disabled	Normal	All	All	All	All	All	All
Quotes	Disabled	Normal	All	All	All	All	All	All
Tasks	Enabled	Normal	All	All	All	All	All	All

Figure 13
Role Information for Collaborative Edition Users

Further information regarding Teams, Roles and User Management can be found in the Administrator and User Guide.