



Define Teams

This job aid explains how you can define teams for optimized guided recommendations.

About Teams

- Define teams to optimize guided recommendations for your organization and balance time-off requests with coverage needs and accruals balances.
- Guided recommendations present information to help manage time-off requests and recommend whether to approve or refuse requests.

To define a team:

1. Click **Main Menu**. Select **Maintenance > Team Definitions**.
2. Do one of the following:
 - a. Click **Add a Team**. Enter a **Team Name**.
 - b. Select one team. Click **Edit**.
 - c. Select teams. Click **Delete**. Click **Yes** to confirm.
3. (Optional) Enter a **Description**.
4. Select a **Start Date** and **End Date**.
5. **Important:** For a **new** team definition, the dates **cannot** be before today's date. For an **edit** of an existing team definition, you can set the dates to be in the past to inactivate that team definition.
6. Click the calendar.
7. Select dates.
8. In **Employees in this team**, select one of the following:
 - a. **Hyperfind** > Select the Hyperfind query.
 - b. **Reports to Manager** > Select the manager of the employees.
 - c. **Schedule Group** > Select the schedule group.
9. Click **Apply**.

Add Team Definition
✕

Team Name*

Description

Start Date

📅

End Date

📅

Employees in This Team*

Reports to Manager ▼

Martin, Michael ▼

Cancel

Apply

To define absence quotas on the members of a team:

1. Select the **Team Members** tab.
2. Click the column header or down arrow to change the sort order.
3. Set the daily limit of absences
4. Select the **Team Absence Quota** tab.
5. For each day, enter the maximum number of employees who can be absent.

6. Click **Save**.

Number of Absences Allowed in the Team							
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Holiday
2	2	2	4	4	0	0	3

Team Members | Team Absence Quota | Recommendations

7. Select the **Recommendations** tab.

8. In **Days with Team Absences at or above the Daily Quota**, enter the percentage of a date range of time off that can be ignored. These days have a number of time-off requests that is greater than or equal to the daily quota.

Example: Set the percentage to 20. If an employee asks for 5 continuous days off, and one of those days (=20%) is above the daily quota, the recommendation is to approve the request. If two of those days (=40%) are above the quota, the recommendation is to refuse the request.

9. Select **Auto Approval** to automatically approve requests **only** if approval is recommended.

10. **Important:** If **Automatic Approval** is selected in the request subtype, that setting overrides **Auto Approval** in the Team Definition. For recommendations to automatically approve requests, select **Auto Approval** in the Team Definition recommendation **and** unselect **Automatic Approval** in the request subtype setup.

Recommendation Settings	Automatic Processing
<p>Approval Is Recommended. No accruals or team absence issues</p> <p><input type="text" value="25"/> % Days with team absences at or above the daily quota.</p> <p>Approval is not recommended. Accruals exceeded or days above daily quota is greater than xx%</p>	<p><input checked="" type="checkbox"/> Auto Approval</p>

Team Members | Team Absence Quota | Recommendations

11. Click **Save**.