How to Assign Record Types to a Team

TI version 10.7

TRIAL INTERACTIVE

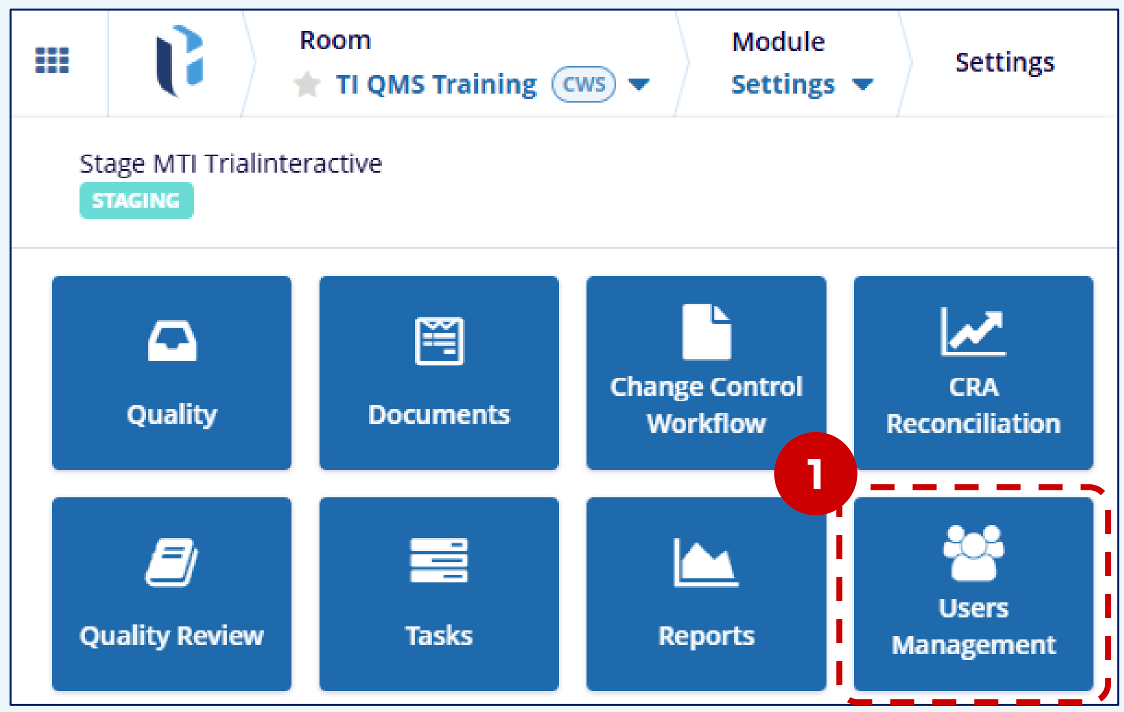
APPLICABLE TO:

- ● SuperAdmin
- ● Admin
- ● Collaborate
- ○ CCR

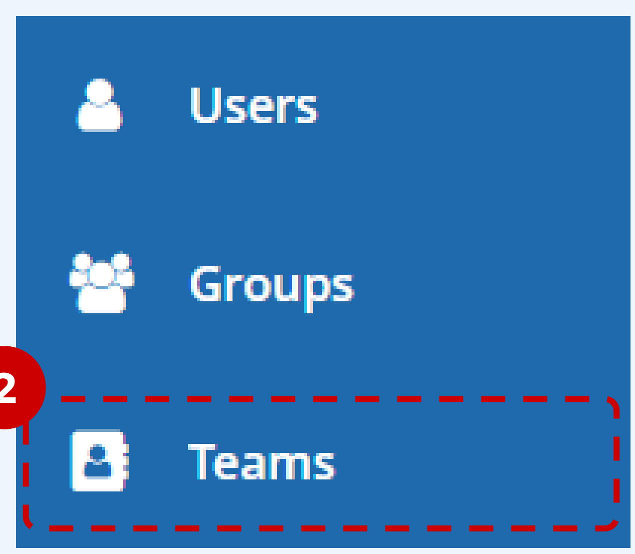
Internal Use Only– Do Not Distribute

Matching a Record Type to a Team makes it so that when a record is created matching the selected Type, the appropriate team is selected by default.

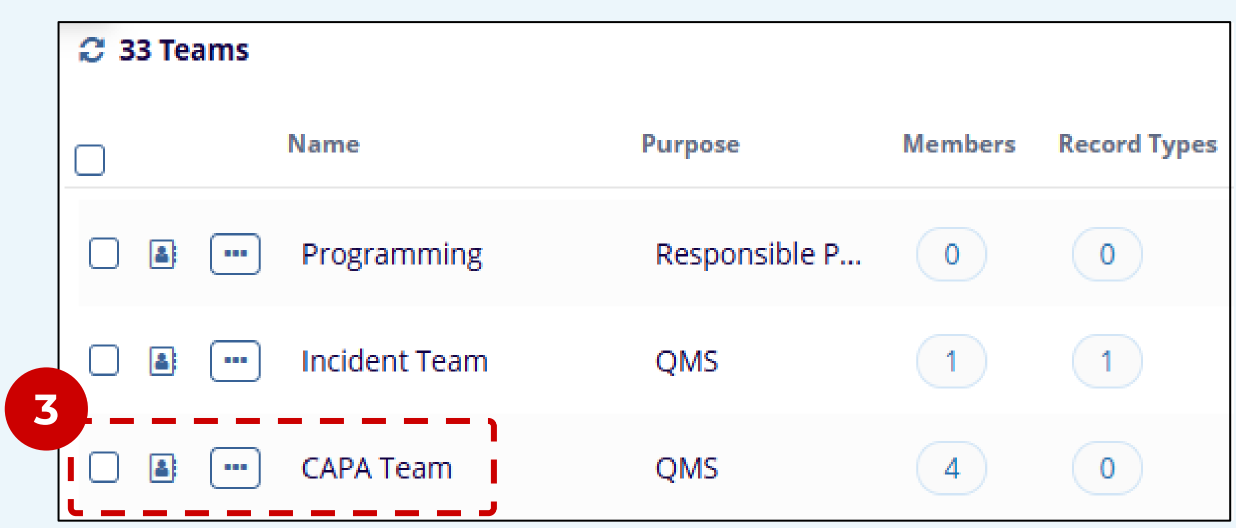
1 Enter a QMS-Enabled Collaborate room. Via the waffle or the module selector, navigate to the **Users Management**.



2 Select **Teams** from the navigation sidebar.



3 Select a <u>QMS team</u>: click on the name or the checkbox.



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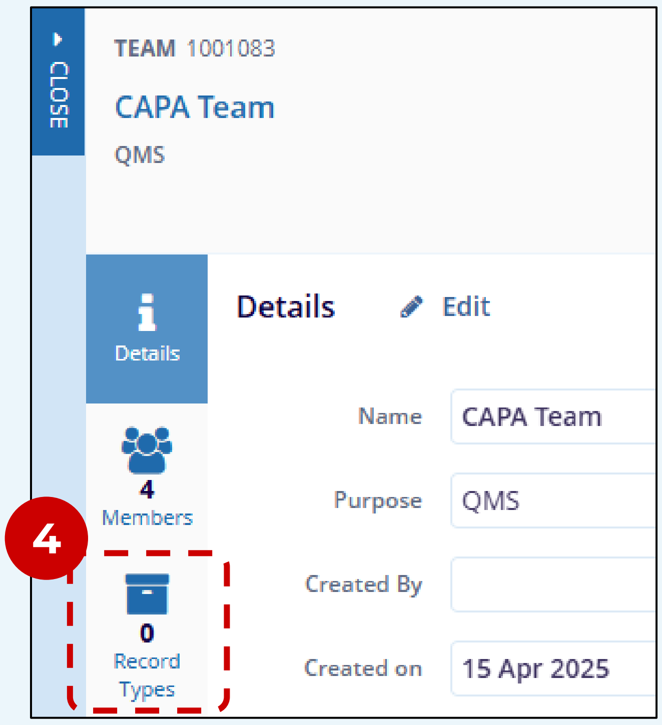
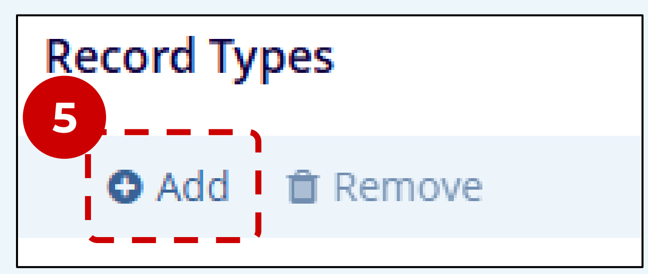
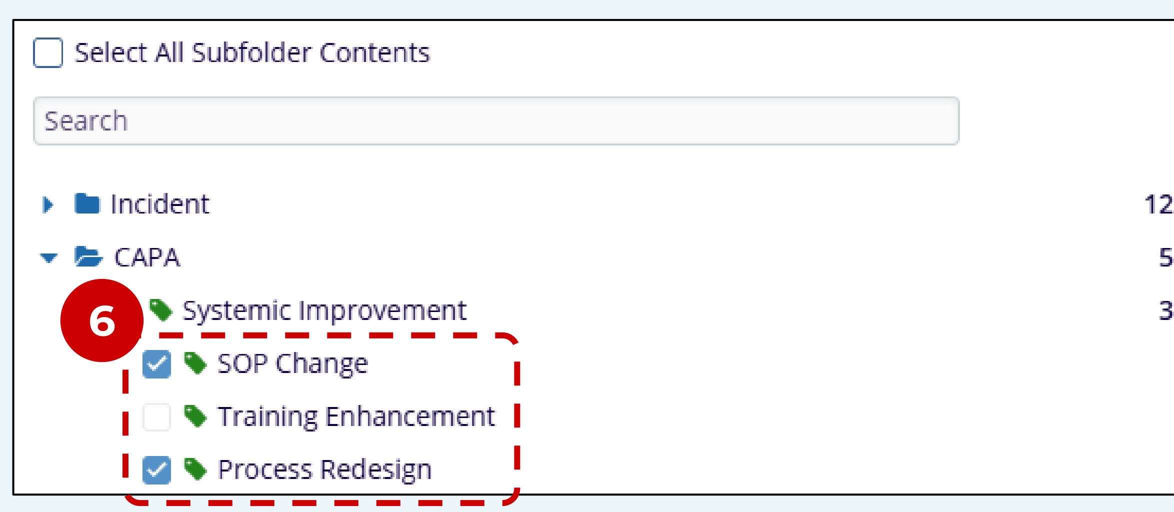
4 In the side panel, click on **Record Types**.



5 Click on **Add**.



6 Select <u>all</u> **types** that apply – folder selection is also possible if 'Select all Subfolder Contents' is selected. (options may vary due to customization requested by client).



7 When you have completed your selection, click on **Add Record Types** to finalize.

Workflows must be configured, and match a Record Type (or more), for the QMS process to work correctly.