

How to Assign Record Types to a Team

TI version 10.7

APPLICABLE TO:

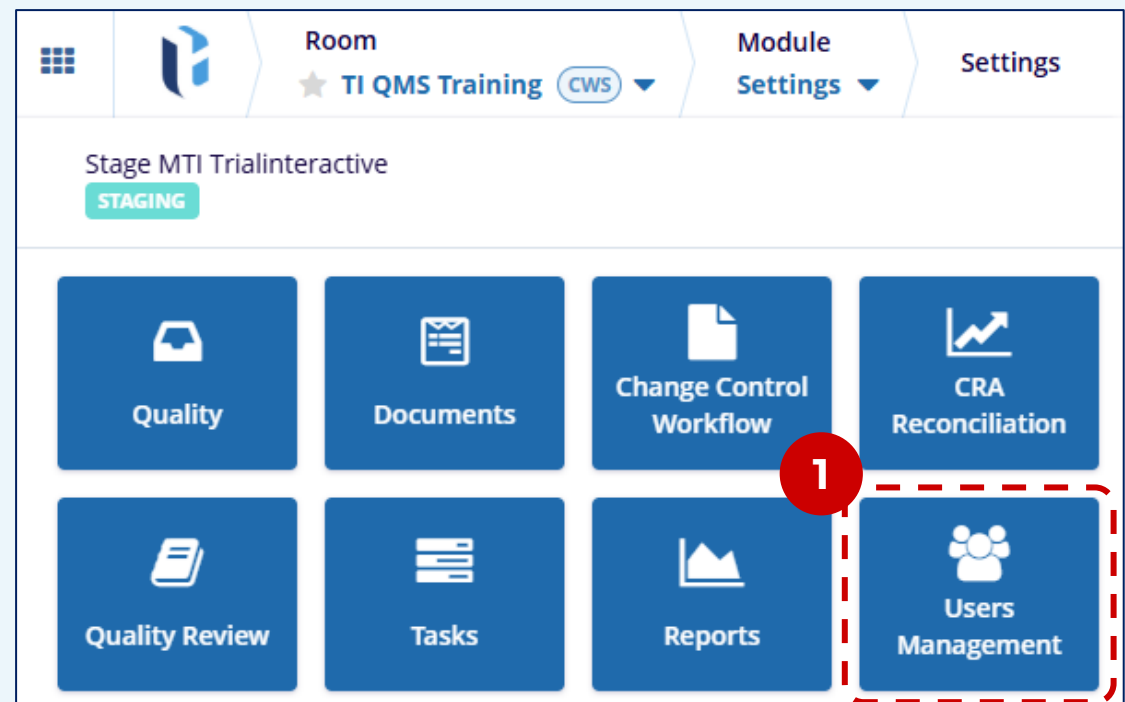
- SuperAdmin
- Admin
- Collaborate
- CCR

Internal Use Only– Do Not Distribute

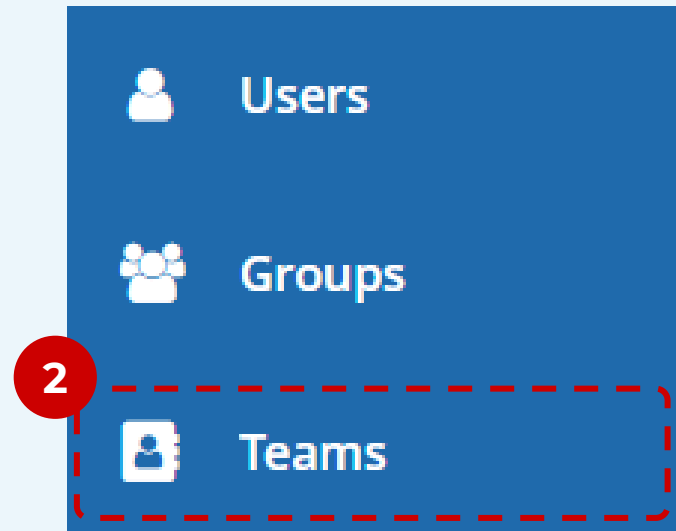


Matching a Record Type to a Team makes it so that when a record is created matching the selected Type, the appropriate team is selected by default.

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 QMS team: click on the name or the checkbox.

The screenshot shows a table titled '33 Teams'. The 'CAPA Team' row is highlighted with a red dashed box and a red circle with the number '3'. The table has columns for Name, Purpose, Members, and Record Types.

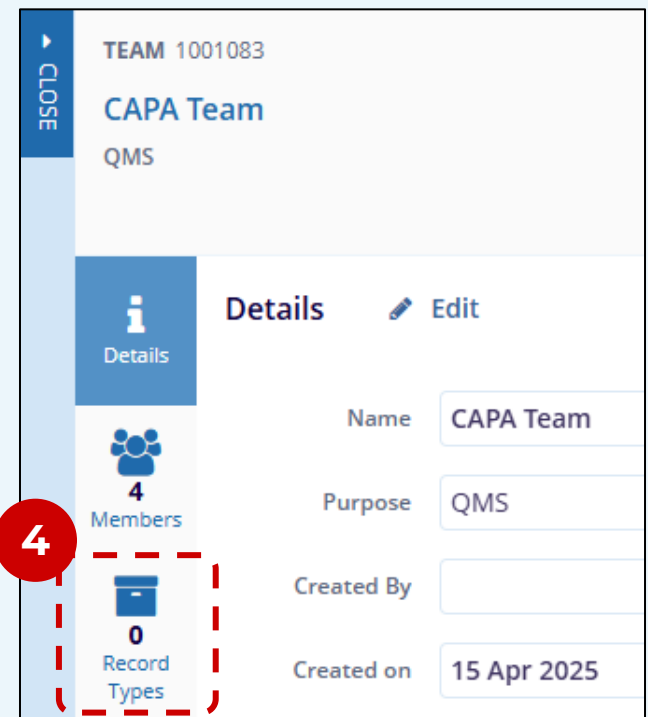
	Name	Purpose	Members	Record Types
<input type="checkbox"/>	Programming	Responsible P...	0	0
<input type="checkbox"/>	Incident Team	QMS	1	1
<input type="checkbox"/>	CAPA Team	QMS	4	0

How to Assign Record Types to a Team

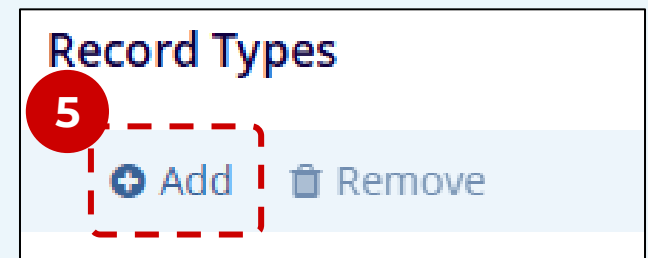
TI version 10.7

Internal Use Only– Do Not Distribute

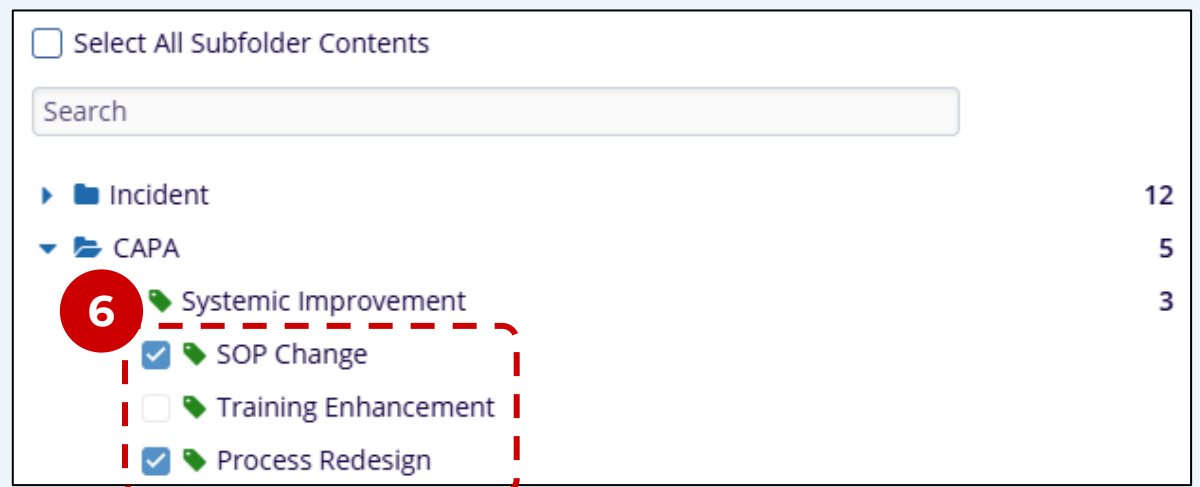
4 In the side panel, click on **Record Types**.



5 Click on **Add**.



6 Select all 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.