**Explore Clarity Teams\_ Questions asked during the session via chat.**

Session Overview

Working as a team is critical to any business success. Clarity lets you fund, staff, and manage work for your development and business teams, using staffing views for ad-hoc changes and capacity planning, scoreboards to manage team level to-do's, and easy-to-use collaboration for faster decisions. Learn more about working with teams in Clarity with Mary Lichtenauer, Broadcom Solutions Engineer and Clarity expert as she takes us through the business benefits.

Questions

1. Please cover how demand and capacity at the team level is carried down to the role and the resource.

*Teams are a Clarity Resource and are treated as distinct resources in the context of Capacity and Demand.*

1. Can you assign Role to the Team?

*Yes, Roles can be associated to teams. The use case for this would be if you wanted to cost the team based on a role rate. For example, an Engineering Team with a Primary Role of Engineering could use the rate from the rate matrix assigned to the Engineering Primary role.*

1. Is it mutually exclusive? Can I be assigned as a named resource to a Project and also be part of a Team? If so, how will this look in portlets and reports?

*The same resource can be part of a Team which is allocated to an investment AND directly allocated to the same investment. However, both resources are treated separately, meaning, reviewing named resource allocations in the staffing workspace or portlets/reports, one will only see allocations for that resource. The same goes for the Team. Reviewing Team in the Staffing Workspace or portlets/reports, one will only see allocations for the Team resource.*

1. What happens when a team is allocated to a Project and Team allocation/availability change?

*The allocation to the Project will not change. This behavior is consistent with what would happen if a named resource’s availability was changed. If you delete and re-add the resource/Team to the project, the allocation will change, but the allocation will not change automatically due to changing the team or changing a resource’s availability. Note that Team allocations, just like resource availability, is not time phased. So Clarity would not be able to distinguish there were 5 people on the Team Jan-March, but then 6 people on the Team from April to June. This is an intentional design principle to keep the concept of Teams simple and easy to use!*

1. Does this mean the PM needs to know how many people are in the team? Let’s say the PM doesn’t know exact head count on a Team, but they know 1.5 FTE are needed. How can the PM add % allocation?

*The answer depends on how you set up your Teams. Let’s say that you set up Teams and allocate named resources to the Team. For this example, you allocate 5 named resources to the team at 100%. If you then subsequently allocate the team to an investment at 1.5 FTE’s, you will in reality be allocating 7.5 FTE’s (1.5\*5).*

*Alternatively, you can set up the Team with the desired resources, and then allocate them all at 0%. Add one resource to the team (you might want to consider a ‘generic resource’ for the purpose of setting the availability of the team to 8 hours/day – this generic resource would have availability set to 8 in the resource profile). Add the generic resource to the team. The Team will now have an availability that is equal to 1 FTE. When you put that Team on an investment you can change the default or time phased allocations to the FTE’s you want from that team, and the hours/FTE’s will calculate correctly.*

1. How is it separating Opex and Capex for team?

*If you generate the cost plan using allocations, it will use the Capitalization %’age attribute on the Team resource. If you generate the cost plan using Assignments, it will use the cost type associated with the Task for which the Team is assigned.*

1. If the Team consists of individuals of mixed transaction classes – (internal vs external labor)- can you see that in a cost plan grouping?

*No, the cost plan is generated based on the Team financial properties, not the properties of the individual resources within the Team.*

1. Does the Staff module not show a list of resources that are part of the team? Does it stop the PM adding named resources that are already in Team?

*No, the Staff module will not show a list of resources assigned to a Team, nor does it prevent the PM from adding named resources that may already be assigned to the Team.*

1. What if you have agile and waterfall. One project uses teams another uses resources.

*This use case is perfectly fine, as long as resources on Teams are allocated via Teams for the Agile project, and resources that are individually allocated on waterfall projects are not also on Teams.*

1. Let’s say in Security team I have 8 people and Cloud Migration project uses 50% of security team. When security team gets a new resource, what will happen on cloud migration projects allocation hours. By nature of 50% it should change allocation hours considering 9 HC?

*Allocations will not automatically change based on Team changes. See answer in #4 above.*

1. When a named resource, John Doe, is added to a Team and the Team is allocated to Project X at 50%, does Project X appear in John Doe's resource view? This way it shows all work that is taking up John Doe's capacity?

*No, there is no aggregation for team based allocations and named resource based allocations for members that are on the Team. As such, if you are looking at John Doe’s allocations, you would only see those that he is individually allocated to.*

1. If there are 5 people on the Team and each would enter line items but who would submit? Use case works if one person enters time for the team?

*Each individual can access their own timesheet and charge time to investments/tasks that they have access to via their Team assignments. This is one of the nice usability benefits of Teams. It removes the requirement to individually allocate/assign all the team members who need to charge time to an investment. Typically if entering time directly to the Team resource on the timesheet, the PM would likely be the one to submit and/or enter the Team time.*

1. If a resource is allocated 50% to a Team, and the Team is allocated 50% to a Project, can you say that the resource is only allocated 25%? i.e., has 75% availability?

*See previous answers, named resource and Team based allocations are not aggregated into a single view.*

1. If a Team is assigned to a Task and there is no named resource used in allocation or assignment, when name resource posts time to the task, is it mandatory to have a rate by resource or will Team level rates be used if resource rates are not found?

*The rate matrix configuration will determine what rate is used for the resource. For example, an organization might have a default rate used for all situations where no specific rate is entered in the rate matrix. In this specific example, whatever rate the resource would be assigned based on rate matrix configuration would be used (including a default rate), but not the Team rat*