

Journeyx PX Team Assignments Overview

The Greenwich release includes a new team assignments feature for Journeyx PX. Team assignments allow you to block off the future availability of a team without requiring you to pick the specific team member(s) who will do the work when the time comes. PX customers can create as many teams as needed, and PX will show you aggregated resource availability metrics based on the members of each team.

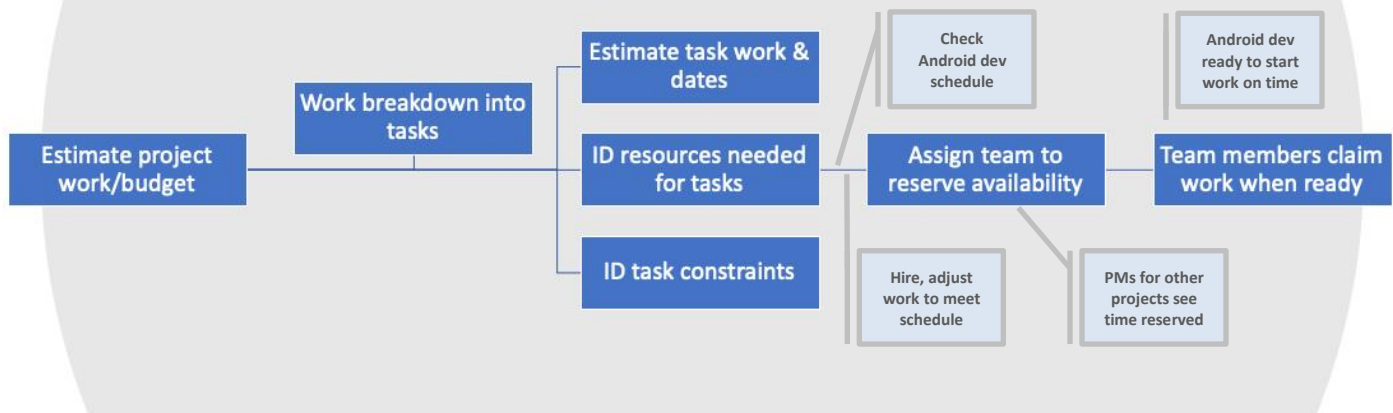
A quick run-down of things you can do with team assignments includes:

- Create teams of resources based on skills, locations or any other custom information
- Review future team capacity in relation to individual team member assignments
- Allow members to “grab” team assignments and assign to themselves when ready to work
- Provide managers with specific role abilities to manage teams as needed
- Set up teams and team assignments in the PX interface or via imports
- Report on team assignments in standard reports and Reportlink

How does this help you? When planning project work into the future, you can block off time for types of resources without knowing exactly who will be doing the work. You can then see future resource capacity based on teams of resources and avoid overbooking and/or plan to add staff to ensure you have the resources to do the work.

Planning Future Project Scenario

- You are planning a project that is confirmed for next quarter.
- Phase 2 will require varying levels of Android mobile app engineering expertise.
- You don't know exactly which Android engineers you will need, but other PMs need to see your project demands on the Android engineering team's time.
- You also need to see if the team has enough future capacity to complete the project on time and on budget.

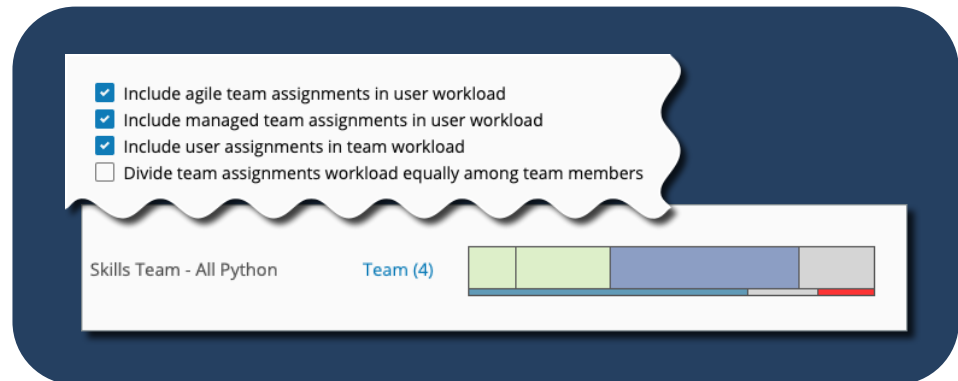


Team Assignment Options, Workflows and Resource Planning Visibility

The Teams feature allows you to create groups of users with shared characteristics for making preliminary "team assignments" to scheduled tasks before you have determined the individual(s) who will do the work. These teams can be grouped based on required skills, location, function or any other user custom field information you choose. *NOTE: User custom fields must be select lists or multi-select lists to be included in the user search criteria for Teams.*

Team assignments are a great way to block off future demands on availability with "placeholder" assignments based on the types of resources you will need to work a

particular task at a later date. Team availability calculations are based on the aggregated availability of the members of that team. Like user workload graphs in PX, team workload graphs show assigned work and available time for a given period. As shown in the team workload graph above, you have a variety of options to view the "total load" for a team or individual user by selecting how you show team assignments in conjunction with individual assignments to team members, and vice versa. Assignment blocks that are colored with dark blues/greens indicate team assignments, and the lighter blues/greens represent individual team member assignments.



Team members cannot log actual work against a team assignment. When the time comes to do the work, a setting that is specific to the assigned task determines how users can track actual work. There are two options for converting team assignments into individual ones:

- **Self or "Agile" assignments:** If you give team members access to a team assignment by making the task available in groups, team members can "grab" the work and assign it to themselves when they start logging time against the task. Like the existing PX auto-assignment feature, it will create a user assignment that replaces the team assignment. If others also add time to the task, the remaining work will be split amongst the users.
- **Project Manager or "Managed" assignments:** If you set a task to have managed team assignments, team members will not be able to log actual hours until someone like a project manager converts the team assignment into individual user assignments.

For more information about team assignments in Journyx PX, please contact your account representative at +1 800-755-9878 or sales@journyx.com.