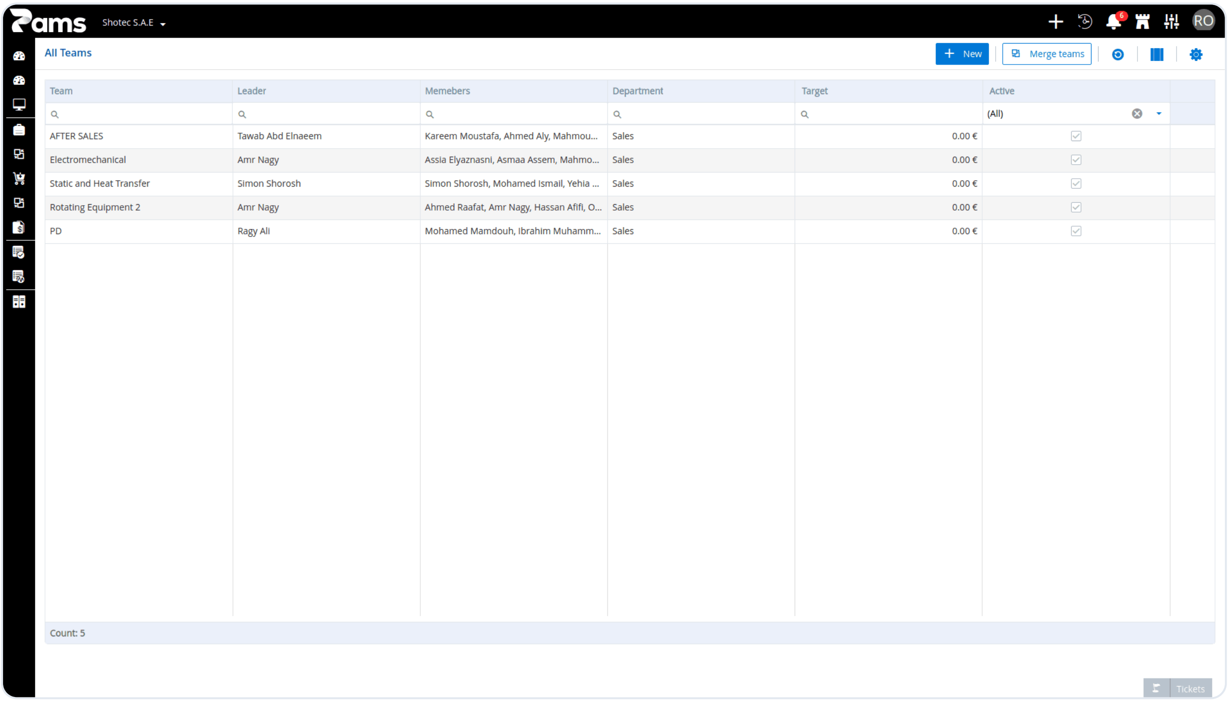
PAMS V2

Teams

July 29, 2026

Teams

Applications › Security Section › Teams



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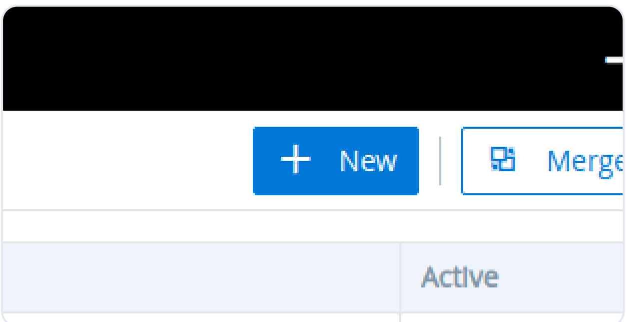
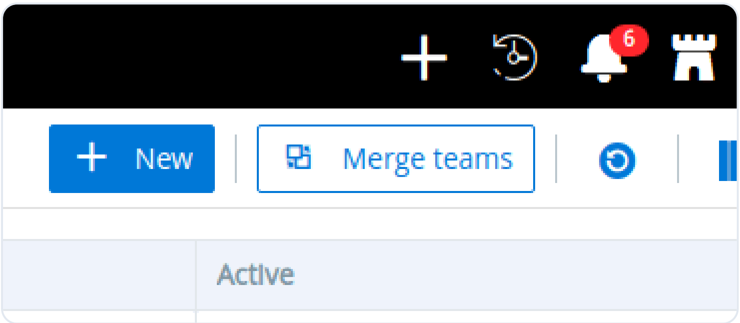




Overview

Teams provide a Security Section workspace for viewing and maintaining team records, including the team leader, members, department, target, and active status. Sales representatives, project managers, purchasing officers, warehouse managers, finance accountants, and payments officers can use this feature when work must be associated with the appropriate operational team.

Use Teams to review the current team structure, open the available Roles and Users views, and maintain team-related records through the available creation and save actions.

Settings

Before maintaining team records, choose the list layout that best supports the information you need to review. The Teams screen provides layout controls for managing the visible list presentation.

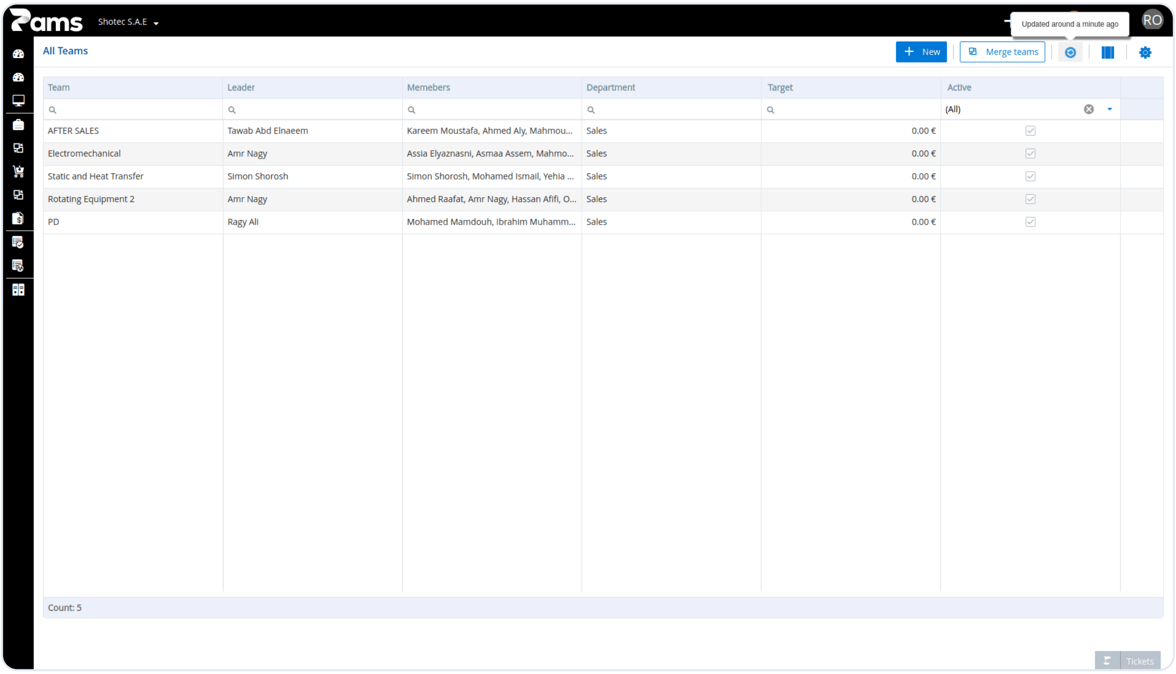
1. Open **Security Section** > **Teams**.
2. To use the default presentation, select **Standard Layout**.
3. To create a different list presentation, select **Add Layout**, enter a value in **Layout name**, and use **Columns Chooser** to select the columns required for your review.
4. Select **Save** to retain the layout, or select **Cancel** to discard the change.
5. When working with an existing layout, use **Update Current** to save changes to the current layout. Use **Delete Current** only when the current layout is no longer required.

> **Note:** Layout controls affect how the Teams list is displayed. Review the visible columns before saving a layout so that essential information, such as the team leader, members, department, target, and active status, remains available.

Workflow

Review and locate a team

1. Open **Security Section** > **Teams**.



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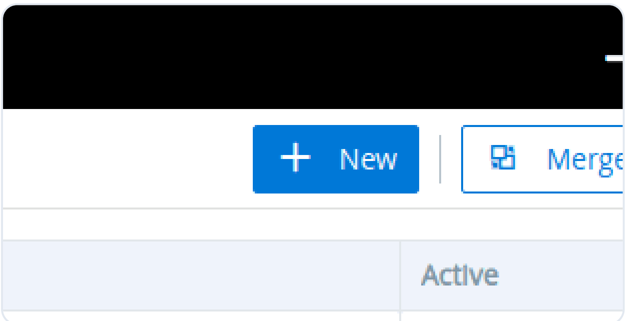
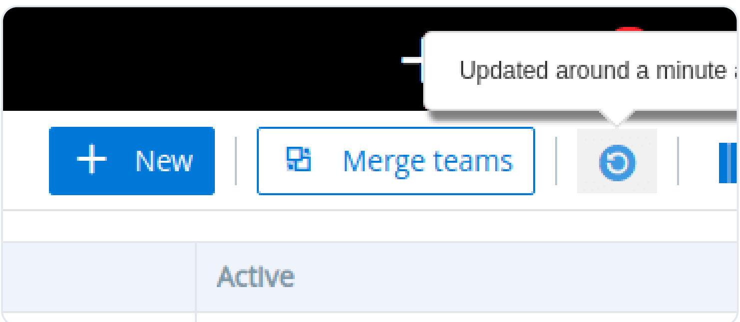


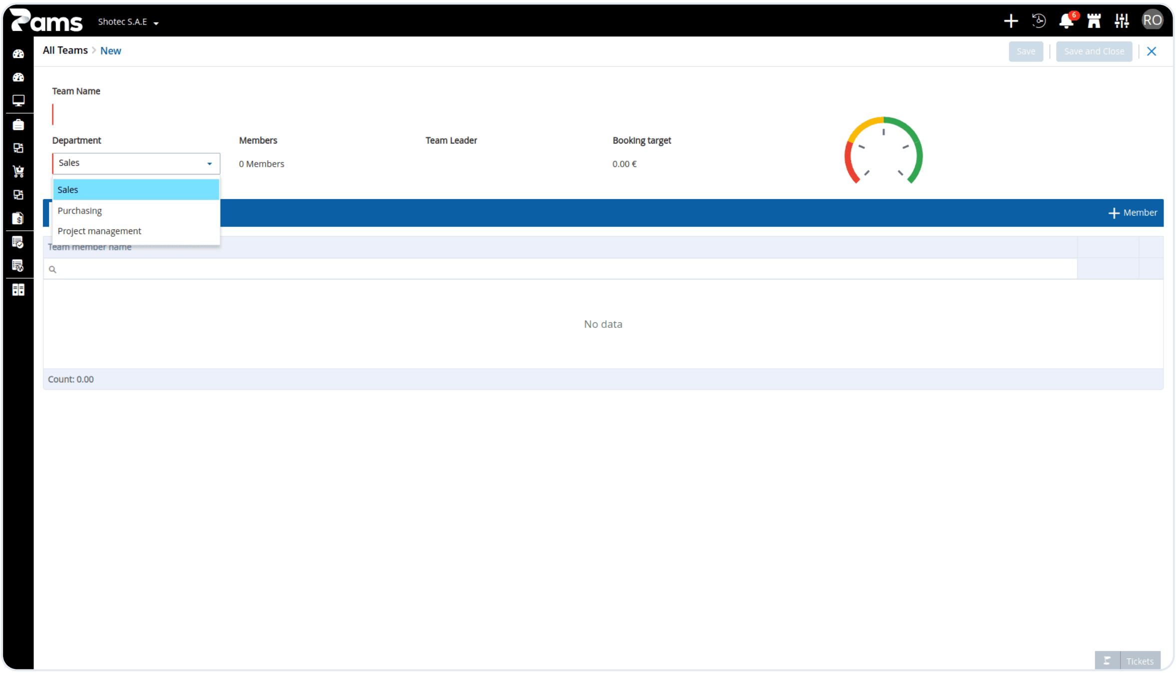


2. Review the team list. The available list information includes **Team Leader**, **Memebers**, **Department**, **Target**, and **Active**.
3. To find a particular record, enter search criteria in **Search** or use **Select...** to choose an available selection value.
4. Use **Select** to apply the selected value where this control is available.

> **Tip:** Use the search and selection controls before opening a record when the Teams list contains multiple departments or team leaders.

Decide whether to create, update, merge, or remove a team

5. If a required team does not appear in the list, select **New**.



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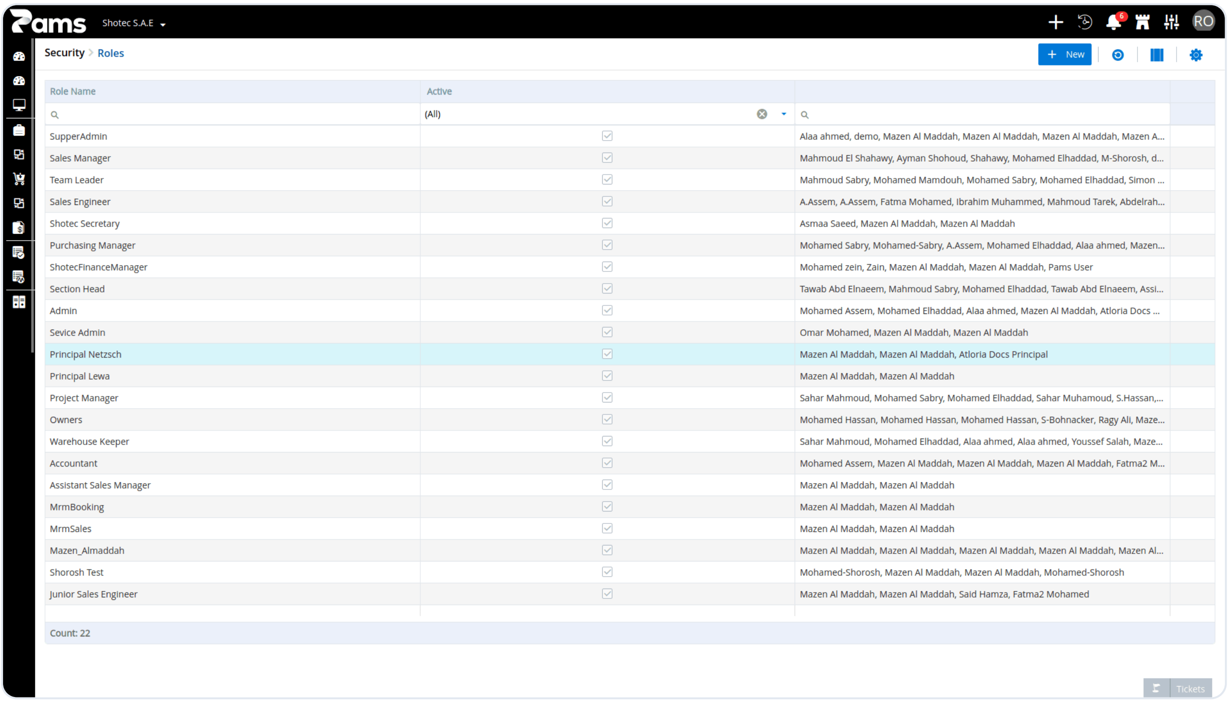
6. On the new Teams screen, complete the available fields:
   - **Enter User Name**: enter the user name requested by the form.
   - **Enter Password **: enter the password requested by the form.
   - **Select...**: choose an available value where the form provides a selection.
   - **members**: review or maintain the team-member area available on the form.
7. Choose the appropriate completion action:
   - Select **Save** to save the record and remain on the current screen.

- Select **Save and Close** to save the record and return from the form.
- Select **Ok** when the form requests confirmation.
- Select **Attach** when you need to use the available attachment action.
- Select **Tickets** when you need to open the available ticket-related action.

8. If an existing team requires changes, open the applicable record and save the revised information with **Save** or **Save and Close**.
9. If duplicate team records must be consolidated, select **Merge teams** from the Teams list and complete the available merge process.
10. If a team record must be removed, use **Delete**. Where a current layout rather than a team record is being removed, use **Delete Current** instead.

> **Warning:** Use **Merge teams** and **Delete** only after confirming that you have selected the intended team record. These actions affect the team information available to other users.

Roles



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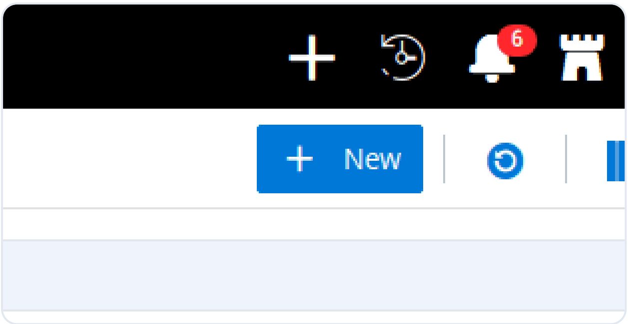
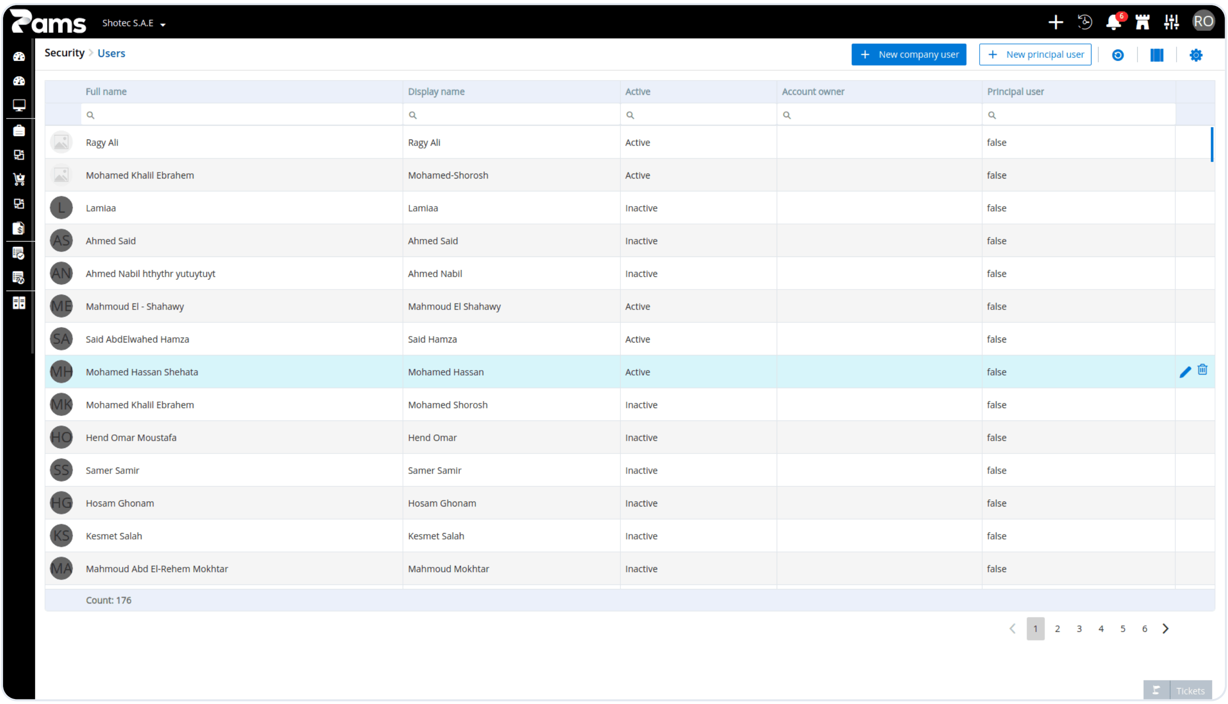


The Roles tab provides the role-related view within Teams. Use this tab to review the role information available for the selected team context and to confirm that the team structure is being viewed in the appropriate security area.

No action is provided in the available screen information to move a record into or out of the Roles tab. Use the tab to review the role-related records presented there.

Users



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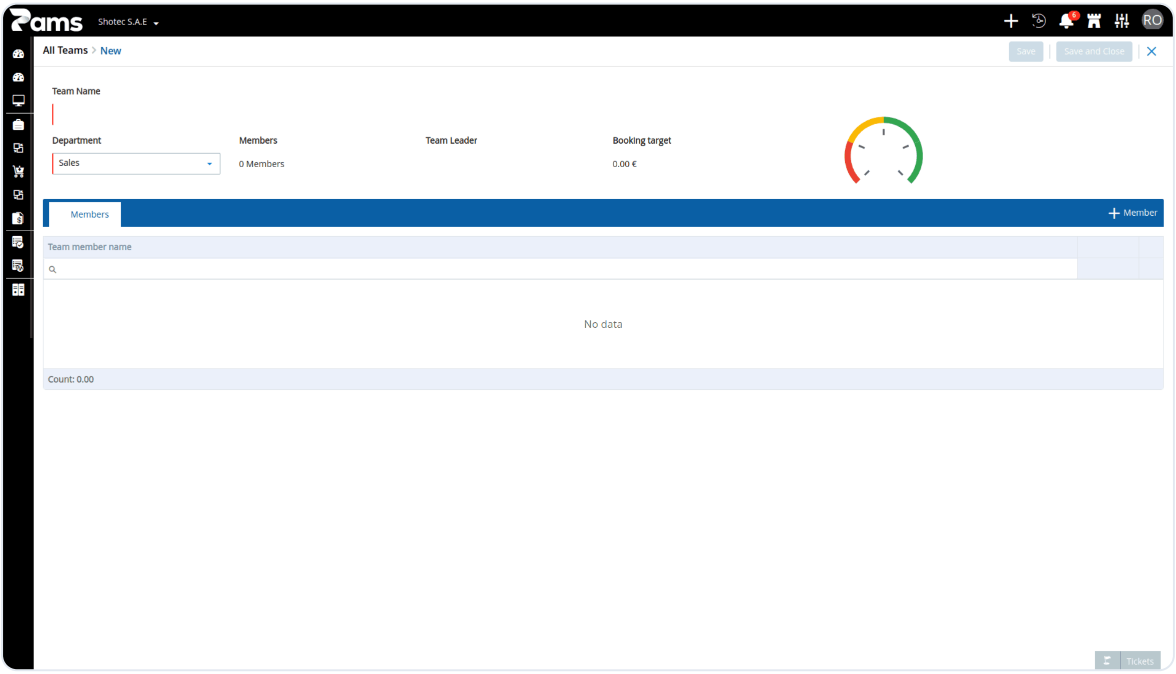
The Users tab provides the user-related view within Teams. Use it to review the users associated with the Teams area and to open the available Users screen when user information must be reviewed.

The available Users screen does not provide field or action metadata. No control is listed for moving a user into or out of this tab; therefore, use this tab as the available user review view.

Examples

A purchasing officer needs to confirm the team responsible for an electromechanical buyout before continuing work on the related sales job.

1. Open **Security Section** > **Teams**.
2. In **Search**, enter `Electromechanical`.
3. Review the matching team row and confirm the displayed **Team Leader**, **Memebers**, **Department**, **Target**, and **Active** information.
4. Open the **Roles** tab to review the available role-related view for the team.
5. Open the **Users** tab to review the available user-related view.
6. If the required team is not available, select **New**.



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7. Complete **Enter User Name**, **Enter Password **, and any available **Select...** value required on the form. Review **members**, then select **Save and Close** to finish.

The team record is then available from the Teams list for subsequent review through its Roles and Users views.

Tips

> **Tip:** Keep the Teams list focused by using **Search** and **Select...** rather than manually reviewing every record.

> **Note:** Use **Save** when you need to continue working on the current team record. Use **Save and Close** when the record is complete.

> **Warning:** Do not confuse **Delete Current**, which applies to the current layout, with **Delete**, which is the available record deletion action.

Troubleshooting

Symptom	Likely cause	Fix
The required team is not visible in the list.	A search term or selected value is limiting the displayed results.	Review **Search** and **Select...**, then adjust or clear the criteria and select **Select** where available.
Changes to a team are not retained.	The record was not saved before leaving the screen.	Select **Save** to remain on the form, or **Save and Close** to save and leave the form.
The required columns are missing from the Teams list.	The active layout does not include the required columns.	Use **Columns Chooser** to adjust the layout, then select **Update Current** or create a layout with **Add Layout** and **Save**.
The wrong layout is displayed.	A nonstandard layout is active.	Select **Standard Layout** to return to the default presentation.

Related pages

- Security Section — Overview
- Security Section — Learning Path