

SOP: Creating Functions and Linking to Profile Properties

Objective

The objective of this SOP is to guide team members on how to create a function and link it to a profile property in order to effectively manage and categorize collaborators based on their roles.

Key Steps

1. **Create a Function:**
 - Navigate to the top right corner and click on the gear icon to access functions.
 - Click on the "Add" button to create a new function.
 - Give the function a name that represents a specific role, e.g., "Driver."
 - Save the function.
2. **Set Up Profile Properties:**
 - Ensure you have created a profile property group and a profile property (e.g., "Function") with a predefined list of options (e.g., Driver, Power User, DSM, CSM, PEM).
 - Update the options list in the profile property to include any new functions created.
 - Set this up as a predefined list so that when you add functions, these are updated automatically in the profile property as well.
3. **Link Function to Profile Property:**
 - Go back to the functions section and select the desired function (e.g., Driver).
 - Click on "Add" under the "Default Required Profile Property for New Teams" section.
 - Choose the relevant profile property (e.g., Function) that corresponds to the function.
 - Specify if the profile property is mandatory and set its importance level.
 - Save the changes to successfully link the profile property to the function.
4. **Assign Function to Collaborators:**
 - When adding or editing a collaborator, select the appropriate function (e.g., Driver) based on their role as a profile property
 - Ensure to fill out any related profile properties accurately.

Cautionary Notes

- Ensure that the profile properties and functions are set up correctly to avoid confusion and errors.
- Double-check the linked profile property when assigning functions to collaborators to maintain data accuracy.

Tips for Efficiency

- Regularly update the list of functions and profile properties to reflect any changes in roles or responsibilities.
- Test the functionality by assigning functions to test collaborators before implementing it for all team members.
- Document any new functions created and their corresponding profile properties for future reference.

Link to Loom

<https://loom.com/share/1df9754ff35a478b99e79c827755f72b?src=composer>