

Team Expansion

When workflow activities are assigned to Team roles, the system automatically expands team membership to create individual assignments for member of the team.

Team Assignment Resolution

Team Membership Expansion:

- Activities may be assigned to a single user, a group, or a Team role.
- If a Team role is used, the system looks up all members of that Team.
- Each member receives their own Activity Assignment.

Resolution Timing:

- Team expansion occurs when the workflow is created, before any Workflow Assignment Rules (WARs) execute
- By the time WARs run, any Team roles assigned to activities have already been expanded into individual Identity assignments

Important

If your WAR business logic needs to assign Team roles, the rule method must explicitly query the Team and create assignments for individual member Identities. The system will **not** automatically expand Team roles assigned by WAR methods.

What Administrators Should Expect

Static Membership

- Team membership used for assignments is locked in when the workflow starts.
- Changes to the Team afterward do not update existing assignments.
 - New members won't receive assignments already created.
 - Removed members keep the assignments they had.

Assignment Items Always Reference Identities

- Activity assignments always reference Identity items (individual users or groups), never directly to Team roles.
- To filter by specific team role (e.g., "Team Manager", "Team Member"), query the team_role property in the Team Identity relationship

Best Practices

Use Teams for Consistent Patterns:

- Define teams for recurring assignment patterns (e.g., "Engineering Managers", "Quality Reviewers")
- Reference teams in rule logic rather than hard-coding individual users



- Maintain team membership centrally for easier administration

Consider Team Size Impact:

- Large teams create many individual assignments, which may impact workflow complexity
- Review team size before using teams in high-frequency workflows
- Consider using dynamic assignment rules to filter team members based on additional criteria

Document Team Requirements:

- Include team membership requirements in rule descriptions
- Document which teams are expected to exist for rules to function correctly
- Communicate team structure dependencies to Change Administrators

Query Teams in Rules Sample:

- If rules depend on Team roles, query the team during the WAR execution and create assignments explicitly

```
// Example: Query Team members with specific role and create assignments
```

```
Innovator inn = this.getInnovator();
```

```
string activityId = this.getID(); // Assuming Target = Activity
```

```
// Apply business logic to determine Team ID, e.g. team assigned to context item
```

```
// ... your custom logic here ...
```

```
Item team = inn newItem("Team", "get");
```

```
team.setID(teamId);
```

```
team.setAttribute("select", "id ");
```

```
// Query Team Identity relationships filtered by Team Manager role
```

```
Item teamIdentityRel = team.createRelationship("Team Identity", "get");
```

```
teamIdentityRel.setAttribute("select", "related id");
```

```
Item teamRole = teamIdentityRel.createPropertyItem("team_role",  
"Identity", "get");
```

```
teamRole.setProperty("name", "Team Manager");
```

```
team = team.apply();
```

```
if (team.isError())
```

```
{
```



```

return inn.newError("Failed to get Team: " + team.getErrorDetail());
}

// Iterate through Team Identity relationships to get Team Manager Identities
Item teamIdentities = team.getRelationships("Team Identity");
int managerCount = teamIdentities.getItemCount();

if (managerCount == 0)
{
return inn.newResult("No Team Managers found in team");
}

for (int i = 0; i < managerCount; i++)
{
Item teamIdentityRel = teamIdentities.getItemByIndex(i);
string managerIdentityId = teamIdentityRel.getProperty("related_id");

// Create assignment for this Team Manager Identity
Item assignment = inn.newItem("Activity Assignment", "add");
assignment.setProperty("source id", activityId);
assignment.setProperty("related id", managerIdentityId);
assignment.setProperty("voting weight", "100");
assignment = assignment.apply();

if (assignment.isError())
{
return inn.newError("Failed to assign Team Manager: " +
assignment.getErrorDetail());
}
}

return inn.newResult("Assigned " + managerCount + " Team Manager(s) to
activity");

```

