BlueStep™

Team™

How to use Team^{TM}

If you have never been to Team^{TM} before:

1. **Get Invited:** Contact the Team adminstrator from your organization and ask to be invited to a team.
2. **Accept the Invitation:** Click on the link in the e-mail invitation and fill out the necessary information to create a username and password. Keep these safe and handy, as in most cases, you will use them every time you enter the system or when away from your own computer.
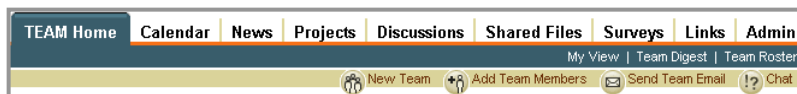
To access an existing Team:

1. **Go to the Home Page:** Using Internet Explorer 5.4, 5.7 or 6.0, go to the URL or home page provided by your organization. It is recommended that you have Windows 95, 98, 2000 or XP installed on your computer.

2. **Login:** If you are not logged in, you will need to do so. Enter your Username and Password and click LOGIN. Please remember that Usernames and Passwords are case-sensitive; that is, they must be entered with capitals and lower-case letters exactly as they were originally created, and without extra spaces before or after the words.

   I'm already a user
   Username * [   ]
   Password * [   ]
   (Login) ☑ Remember Me
   * Required

3. **My Profile:** It is important to keep your Team information updated. If you have changed e-mail addresses or personal information, click the My Profile tab at the top of the screen and make the necessary changes. Keeping your e-mail address current is particularly important if you ever need the automated Username and Password Look-up system to send you a reminder of your login data or need to hear from other members of your Team.

4. **Click on your Team(s):** Find the Team you want to use from the My Teams drop-down (upper right of screen) or from the Team listing on your home page.

To navigate in a team:

| TEAM Home | Calendar | News | Projects | Discussions | Shared Files | Surveys | Links | Admin |

My View | Team Digest | Team Roster

New Team Add Team Members Send Team Email Chat

…to navigate the Team utilities, click on the appropriate tab in the _Team Navigation bar_.
…to view the list of Team members, click on the _Team Roster_.
…to view your personal summary view, click on _My View_.

To see what's new in your Team: View the Team Digest

From the navigation bar, click on the Team Digest tab. A listing of the new items for the day will be displayed. In the upper right hand corner you can also select a different day and get a digest view for that day.

To Create, Edit, Delete or Archive Team items:

New Project

*Generally, team members will have the ability to create items with any of the utilities in Team[TM]. You may **not** be able to edit or delete items created by other team members. If you do not see the icon associated with any of these activities, then it is likely you did not create the item and cannot change the item.*

- ❖ **To add a new item:** The utilities within Team each have a button, generally located in the upper right hand corner of the utilities page, right below the Team navigation bar. Click on the button and add your particular item.
- ❖ **To Edit:** Click on the Edit pencil icon 🖉 to change information associated with the Team item.
- ❖ **To Delete:** Click on the Delete trashcan icon 🗑 to remove the item you wish to remove. The delete utility will tell you the item will be permanently deleted and ask you if this is okay.

To Send an email to your Team or Team members:

- ❖ **Notify your Team about new content:** While adding an item, you can check the box indicating "E-mail Notification". Remember, Daily Digest will automatically signal Team members of changes for the previous day, if they are subscribed. "E-mail Notification" sends out an immediate special alert, regardless of subscription.
- ❖ **E-mail your Team anytime:** Click on the "Send Team E-mail" icon in the secondary navigation bar. This will open the roster with the Team members listed. You can send the e-mail to everyone, clear the list and select certain individuals or re-select the whole roster.

Your Primer to Project Management:

1. **Define the project:** Create a new project by selecting the new button from within the Project utility. Fill in the details and choose the Project lead; the default lead is the person creating the project.
2. **Create Tasks:** Identify the major assignments required to finish the Project and create tasks associated with the Project. Assign the task to a Team member.
3. **Create Sub-tasks:** Some tasks may require that multiple activities be created to complete the task. You can create smaller sub-tasks and assign them to Team members.
4. **Status:** Each Project, task or sub-task can have a status associated with it. This will allow the Team member to note activities and progress.
5. **Delegate:** Avoid micro-managing, let task owners create their own sub-tasks and status notes.

Set expectations for the Project:

1. **Lead:** Establish your management style: Autocratic (tight control) to Laissez-Faire (self-governing).
2. **Hold People Accountable:** Set clear guidelines of responsibility for updating Projects and Tasks.
3. **Motivate:** Communicate and encourage members who use the Team™ tools.
4. **Measure Progress and Manage Risk:** Regularly update Project/Task/Sub-task status activities.

Using Status to track activities:

●	▽	⊗	✓
On Schedule: Minimal issues	Schedule at Risk: Issues	Behind Schedule: Significant Issues	Done

Team members can use Status reporting to track their activites and make questimates of the level of completion. The % done is a user-entered field and is not tied to the status color coding. It does, however, give team members a quick look at the progress being made by the assignee.

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