

BlueStep TEAM™ QUICK-GUIDE

Fast Facts & Features

Good Afternoon Kent | My Profile | Logout | Search | My Teams | Tools | Sites

EVENT PLANNING 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

Event Planning

The Event Planning team is responsible for planning all foundation events, both internal and external. This team is made up of professional event planners, but also includes a cross-discipline representation from Marketing, Finance, Sales, and Executive staff.

[Edit Team Message](#)

Calendar 3 of 10...

Events occurring within the next 90 days.

10/31/2001 9:00AM MST [Gala Event Update](#)
Location: Office

08/31/2001 All day -- [Quarterly continuing education seminar](#)
Location: Marriott Marquis - Midtown Manhattan

10/31/2001 9:00AM MST [Gala Event Update](#)
Location: Office

News 3 of 7...

[Demonstration of Zesty Editor](#)
Posted 08/16/2001 by Rich Hanks

[ABC Foundation partners with BlueStep, Inc.](#)
Posted 07/10/2001 by Andrew Jackson

[Sun is shining air is clean](#)
Posted 08/10/2001 by Rich Hanks

Discussions 3 of 3

[Effective Leadership](#)
Posted 08/01/2001 by Michael Vetta

[What training do you need?](#)
Posted 07/10/2001 by Andrew Jackson

[Dress Code for Annual Conference](#)
Posted 07/10/2001 by Andrew Jackson

Surveys 3 of 10...

[What do you want to eat?](#)
Created 08/10/2001 by Rich Hanks

[How many people are you bringing to the company picnic?](#)
Created 08/14/2001 by Rich Hanks

[Which areas of event planning do you think can be successfully outsourced?](#)
Created 08/02/2001 by Rich Hanks

Projects 3 of 12...

[Summer Picnic](#)
Status: 0% - Normal Priority - Ends 11/10/2001

[Breakfast Mtg.](#)
Status: 0% - Normal Priority - Ends 11/07/2001

[Fundraiser](#)
Status: 0% - Low Priority - Ends 11/07/2001

Shared Files 3 of 11...

[Unknown Picture \(TMOV01P04_15_2644\)](#)
71 kb - Posted by Rich Hanks

[Proprietary technology table \(Proprietary Technology table070301.doc\)](#)
42 kb - Posted by Rich Wagner

[BlueStep Product Introduction \(BlueStep Products Intro.pps\)](#)
1161 kb - Posted by Rich Hanks

Links 3 of 4...

[Internal server](#)
Created 07/23/2001

[Meeting Planners International](#)
Created 07/10/2001

[Professional Convention Management Association](#)
Created 07/10/2001

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Example of the Team Home Page

- ⇒ Using Team will increase efficiency and productivity-
- ⇒ Creating Projects helps organize your Team's work-
- ⇒ Posting News creates Team interest-
- ⇒ Calendaring keeps you coordinated with your Team-
- ⇒ Discussing topics before meetings reduces time spent-
- ⇒ Sharing files provides quick and easy modifications-
- ⇒ Letting Daily Digest communicate with Team members is preferable to multiple, manual e-mails-
- ⇒ Opening My View gives you a quick look at your tasks-
- ⇒ Optimizing graphics minimizes access time-
- ⇒ Using the DONE button finishes your task-

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Tool	Description/Usage	User
Projects	<p>Projects: Helps Teams track activities in a way that closely reflects how you work. Remember, a Project is designed to be a broad view of activities.</p> <p>Tasks and subtasks: Assigning the individual items for the Project and the detailed view of your project.</p> <p>For Example: "Scheduling a conference" may be the Project, while "Choosing a hotel" would be a task.</p>	Create, edit and delete projects, add tasks or subtasks and update status.
News	<p>News: Post important or noteworthy items about the Team or Team members. The news items can be upcoming events, promotions or the announcement of a team member's birthday. (Usually simple text that can be entered or cut/pasted from another application. Graphics can be added.)</p> <p>For Example: "The Team would like to congratulate John Smith on his 15-year anniversary with the organization."</p>	Any Team member can create, edit or read news.
Surveys	<p>Survey: Get answers to simple or complex questions. Have as many potential answers as you wish and allow respondents to choose only one or as many as needed. As the creator you can also set a time limit on the survey and decide whether respondent's votes are anonymous or identified.</p> <p>For Example: "What time should we hold the summer party?" (A) 6:00 (B) 7:00 (C) 8:00</p>	Any Team member can create surveys and some or all Team members can be allowed to vote.

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Calendar	<p>Calendar: Schedule activities for the Team. This is not a personal calendar, but schedules items for communication to the entire Team.</p> <p>For Example: Scheduling a Team meeting or committee meeting will show up in all Team member's My View as a reminder of things to come and give them pertinent information and a list of invitees.</p>	Create, edit, or delete scheduled activities.
Links	<p>Links: A quick way to provide Team members with URL links to related or allied websites. Use Links to quickly bookmark useful or important sites for Team members.</p> <p>For Example: If you are working in a medical organization, it might be important to have a quick link to: http://www.ama-assn.org.</p>	Any Team member can add or delete links.
Discussions	<p>Discussions: Create a forum for Team members to receive feedback. Discussions can serve as a quick method to 'front-load' ideas for an upcoming meeting or to get consensus on a topic. Discussions are "threaded", meaning original postings and replies are tied together.</p> <p>For Example: "Our operational year runs from July to June. What problems arise if we move to a calendar year?"</p>	Any Team member can create discussions and all Team members can response to them.

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Shared Files	<p>Shared Files: Team members can post commonly needed files. To be viewed by Team members, the application must be running on their workstation. (If a posted file is in the Word format, then the Team member must also have Word on their workstation.) Use folders with meaningful names and place files in these folders.</p> <p>For Example: Create a folder called "Weekly Board Meeting Minutes" and then post files within the folder. A posted file might be called meeting.032801 to indicate the board meeting minutes for March 28, 2001.</p>	Create folders, post files, download files, and delete files.
My View	<p>MyView: Lists all Teams and displays upcoming events specific to a user. A complete task list is displayed ordered by "Priority" and "Due Date". Users can click on any of the task headings to reorder the list on other headings.</p>	Members of Teams all have access to My View.
Daily Digest	<p>Team has a feature called Daily Digest. When you subscribe, you will receive through your regular e-mail an announcement of all the changes or activities for the preceding day. This will allow you to keep up on changing issues, but without the need for continual e-mail on every single activity that happens.</p>	Users can opt out of the Daily Digest and would not receive the aggregated Team activities, but would still be able to manually check the Digest as desired.