

Team™ in Brief

Team Use Guide

Version 2.0

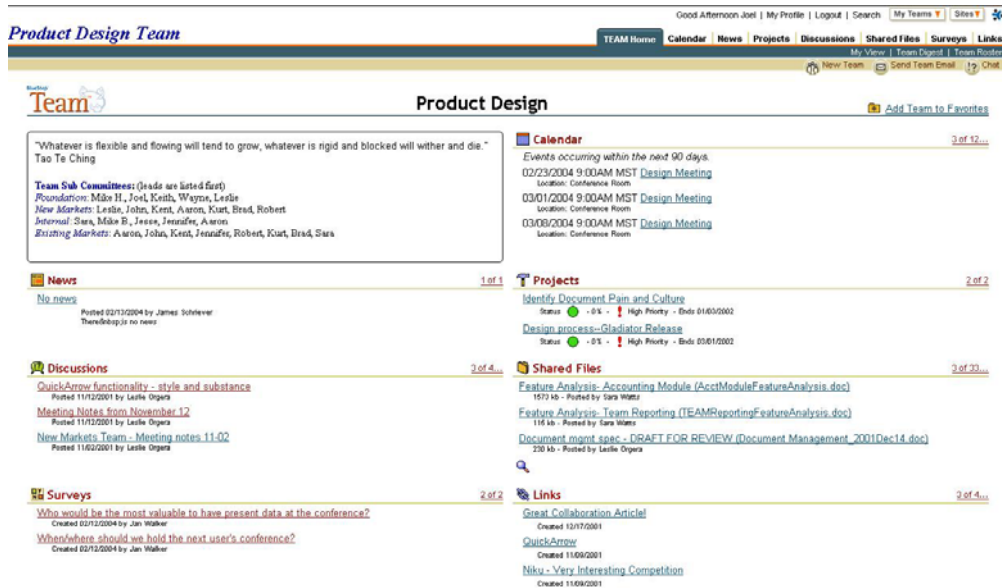


Understanding Team™

Team™ is an integrated information and task management system. It allows exclusive access for boards, committees, chapters, etc. to efficiently track the progress of projects, delegate responsibilities, hold large meetings between entities without long-distance phone calls or travel expense, post pertinent news items, share important files and conduct surveys and discussions online.

Team Home

The Team™ home page, seen below, provides a single, convenient place to access these features, plus a group calendar, the Team Digest, a Team roster and a group e-mailing function. All Team™ features and functions are available to Team members according to the level of permissions set on the various features – No Access, Reader, Participant, Author and Editor.



The screenshot shows the 'Product Design Team' home page. At the top, there is a navigation bar with links for 'TEAM Home', 'Calendar', 'News', 'Projects', 'Discussions', 'Shared Files', 'Surveys', and 'Links'. Below this, the page is organized into several sections:

- Team:** A quote by Tao Te Ching: "Whatever is flexible and flowing will tend to grow, whatever is rigid and blocked will wither and die." Below this is the 'Team Sub Committees' list, including roles like 'Foundation', 'New Markets', 'Internal', and 'Existing Markets' with associated team members.
- Calendar:** A section titled 'Events occurring within the next 90 days' listing three 'Design Meeting' events with dates and times.
- News:** A section with the heading 'No news' and a sub-heading 'Posted 02/12/2004 by James Schiever'.
- Projects:** A section with two project entries: 'Identify Document Pain and Culture' and 'Design process--Gladator Release', each with a status indicator and end date.
- Discussions:** A section with three discussion topics: 'QuickArrow functionality - style and substance', 'Meeting Notes from November 12', and 'New Markets Team - Meeting notes 11-02'.
- Shared Files:** A section with three file entries: 'Feature Analysis- Accounting Module', 'Feature Analysis- Team Reporting', and 'Document mgmt spec - DRAFT FOR REVIEW'.
- Surveys:** A section with two survey questions: 'Who would be the most valuable to have present data at the conference?' and 'When/where should we hold the next user's conference?'.
- Links:** A section with three link entries: 'Great Collaboration Article!', 'QuickArrow', and 'Niku - Very Interesting Competition'.

News

The News section displays the three most current news items. By clicking on the News title, you can access all news articles that have been posted. To post a new article, simply click the New Article button at the upper right of the screen.



Real Estate Vertical -- Development Team

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

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

News Reorder New Article

Revised look for Home Page
 Posted by Unassigned Project Lead on 08/16/2001
 Robert McAllister did an awesome job to clean up the look for this demo! It makes for great packaging. Thanks Robert. I have had several positive comments already and a few "aahs!" [more...](#)

New Name for product
 Posted by Unassigned Project Lead on 08/16/2001
 Yesterday, the Executive Committee approved the name for this tool to be changed to TEAM for Realtors. This direction allows for other versions to follow the same pattern and not dilute the brand name of TEAM (i.e. TEAM for Property Managers, TEAM for Circus Clowns, TEAM for Bococonstructors, etc.) You get the idea. Brian is going to work... [more...](#)

First verison of Home Page changes
 Posted by Michael Lowery on 08/07/2001
 Aaron made the first set of changes to the Home Page. He is able to add, subtract, and reorder pages. You will see that without a code push, it is still looking for the deleted "Survey" page below and has not added the "My Listings" page. These changes will happen next week. Once the name has been decided and a logo designed, this page will... [more...](#)

Outcome of Pricing Conference Call (8/2)
 Posted by Michael Lowery on 08/07/2001
 Posted by Todd Plety on 08/03/2001 Edit Delete (Those in attendance: Rich H., Rich W., Todd P., Kurt W., John S.) Based upon the pricing conference call yesterday, it was determined that: No set-up fee will be charged for this product. A 5 minimum license purchase will be required individual purchase - credit card only Group purchase... [more...](#)

[View Archived News](#)

On the resulting page you may type in the headline, then cut-and-paste the article into the Story box. This box also functions as an editor (similar to processes used in Word™ and Word Perfect™), which you may use to make edits or additions to the article or to write your own article.

Discussions

The Discussions section displays the three most current discussions underway. To view all discussions, click the Discussions title. To start a new discussion, click the New Discussion button, enter the subject of your discussion and your remarks in the Message editor box. To reply to an existing discussion, click on the name of the discussion to read the original remarks and the replies, then click the Reply button and add your comments in the Message box at the bottom.

Product Design Team

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

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

My View | Team Digest | Team Roster

New Team | Add Team Members | Send Team Email | Chat

Discussions Edit Forums

Forums Reorder

► Choice of Prof. Services vertical
[Product Design Team](#)

Discussions > Choice of Prof. Services vertical Forum Reorder New Discussion

Discussion Title	# of Replies	Created By	Created On	Archive	Edit	Delete
Comments on Vertical choice = Prof. Services	3	Leslie Orgera	10/01/2001			

[View Archived Discussions](#) 1 discussion

Surveys

The Survey section displays the three most current surveys underway. To view all surveys that have been created, click on the Survey section title. To vote in a survey, click on the selected survey question and make your selection(s), then click the Vote button.



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

Product Design 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

Surveys

Reorder | New Survey

Survey Question	Created By	Created On	Ends On	Votes	Edit	Delete
Who would be the most valuable to have present data at the conference?	Jan Walker	02/12/2004	05/12/2004	0		
When/where should we hold the next user's conference?	Jan Walker	02/12/2004	05/12/2004	1		

Closed Surveys

Survey Question	Created By	Created On	Ended On	Votes	Edit	Delete
What day and time is best to resume functional spec meetings?	Leslie Orgera	01/07/2002	04/07/2002	10		
Do you like to get handout information prior to a meeting if possible?	Leslie Orgera	10/01/2001	01/01/2002	2		

Creating a survey is an easy process. Start by selecting the New Survey button. Give the survey a name (not the question to be asked, but a short identifier), then type in the question you are asking. Each survey may contain only one question, but offer as many possible answers as desired. For a subject on which you have multiple questions, simply create as many surveys as needed to answer all your questions – there is no limit.

Type in the possible answers (there must be at least two), then click the voting options desired and enter the correct ending date for your survey. Click the Save button when you are finished. To view the results, you must vote first, then all the results will automatically become visible to you according to the voting options you selected.

Calendar

The Team Calendar section displays the three most immediate future events. By clicking on the Calendar section title, you can access the full calendar, add new events, edit existing ones, select attendees, edit your calendar preferences and view future or past months.



Calendar

[New Event](#) [Edit Event Types](#) [Edit Attendee Statuses](#)

Today's Date: **February 16, 2004**

February 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 12:00PM MST Entertainment Committee	2 7:00AM MST Staff Meeting	3 1:00PM MST Decorations Committee	4 8:00AM MST Planning Committee Meeting 10:00AM MST Silent Auction Meeting	5 6:00AM MST Gala Promotions Committee 10:00AM MST Board Meeting	6 7
8 10:00AM MST Visit Gala Ballroom	9 7:00AM MST Staff Meeting	10 7:00AM MST Staff Meeting	11 7:00AM MST Food & Beverage Committee	12 8:00AM MST Planning Committee Meeting 12:00PM MST Weekly Update Mtg.	13 6:00AM MST Gala Promotions Committee 11:00PM MST Sponsors & Supporters Meeting	14 All day -- Valentine's Day
15 12:00PM MST Entertainment Committee	16 7:00AM MST Staff Meeting	17 7:00AM MST Staff Meeting	18 1:00PM MST Decorations Committee	19 8:00AM MST Planning Committee Meeting 10:00AM MST Silent Auction Meeting	20 6:00AM MST Gala Promotions Committee	21
22	23 7:00AM MST Staff Meeting	24 7:00AM MST Staff Meeting	25 7:00AM MST Food & Beverage Committee	26 8:00AM MST Planning Committee Meeting	27 6:00AM MST Gala Promotions Committee 11:00PM MST Sponsors & Supporters Meeting	28
29 12:00PM MST Entertainment Committee	1 7:00AM MST Staff Meeting	2 7:00AM MST Staff Meeting	3 1:00PM MST Decorations Committee	4 8:00AM MST Planning Committee Meeting 10:00AM MST Silent Auction Meeting	5 6:00AM MST Gala Promotions Committee 10:00AM MST Board Meeting	6

Go To

August 2003	S M T W T F S	S M T W T F S	April 2004
September 2003	1 2 3	1 2 3 4 5 6	May 2004
October 2003	4 5 6 7 8 9 10	7 8 9 10 11 12 13	June 2004
November 2003	11 12 13 14 15 16 17	14 15 16 17 18 19 20	July 2004
December 2003	18 19 20 21 22 23 24	21 22 23 24 25 26 27	August 2004
	25 26 27 28 29 30 31	28 29 30 31	

Go [02/16/2004] * Go Today

[Calendar Preferences](#)

To add a new event, click the New Event button. Give a title to the event, select an event type and list its location. The editor box allows you to put in as much detail about the occasion as you would like. The Date and Time section offers multiple choices for calendaring, including all-day and recurring event choices. An automated e-mail message announcing this event can be sent to each member of the Team by simply checking the appropriate box.

You may add attendees to this event by clicking the event tab at the top of the screen. Add and remove attendees buttons are available at the upper right of the attendee screen. When you add an attendee to the event, the selected individual has this event displayed in the Upcoming Events section, which is seen in My View (see My View below). Clicking Save posts the event to the Team calendar and launches the e-mail, if checked.

Projects

The Projects section displays the three most immediate projects, sorted by project start date. To see the full list, click on the Projects section title. To view a specific project with all its details, click on the specific project name.



Projects

[Reorder](#) [New Project](#)

Name	! ✓	%	Start Date	End Date	Lead	Archive Edit Delete
Silent Auction and Black Tie Gala	! ●	95%	07/10/2001	12/31/2003	Abraham Lincoln	
New Building	✘	25%	06/24/2002	12/24/2003	Thomas Jefferson	
Annual Meeting	▼	50%	04/23/2002	02/23/2004	Kent Overly	
First Quarter Meeting	●	0%	01/25/2002	04/25/2004	Kent Overly	
Annual Conference	! ●	75%	12/10/2001	12/21/2004	Franklin Pierce	
Summer Fund and Run	↓ ✓	100%	07/20/2001	05/16/2004	Benjamin Harrison	

[View Archived Projects](#)

6 projects

To create a new project, click the New Project button on the upper right of the screen. You'll be asked to name the project, select the priority level, project lead and a start and end date. There is a memo field for initial project notes and an option to send an automated e-mail notification of the project to all members of the Team. Once the project is created, clicking on its name on the Project list screen give you further options.

Breaking a project down into manageable tasks and assigning responsibility for them is one of the keys to project success. On the individual project page, you will have the option of creating tasks and subtasks, along with assigning responsibilities, adding notes, setting priorities, editing the status, adding attachments and sending e-mail notifications to each of the responsible people. Once a project, task or subtask has been assigned to an individual, he has all the pertinent information displayed in the Task section of My View (see My View below).

Shared Files

The Shared Files section lists the last three files to be posted to the Shared Files page. To see a complete listing of all files available, click the Shared Files title. To read a specific file, click on its name. Using the Add File, Add Multiple Files and New Folder buttons, you can create a hierarchically structured library of documents, including graphics, spreadsheets, templates, etc. Each file and folder may be reordered (position changed) within the structure, displayed in a slideshow format or deleted from the Shared Files list.

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

Product Design 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

Shared Files

[Add File](#) [Add Multiple Files](#) [New Folder](#)

Collapse All Expand All	Size	Posted By	Date	Slide Reorder Edit Delete
Root Folder				
Project Management/Metrics				
Overview of possible BlueStep ideas (Overview-Strategy.doc)	783 kb	Leslie Orgera	10/01/2001	
Technical Considerations				
Application Integration (MFTA Group Research AppServers Integration.doc)	39 kb	Leslie Orgera	10/03/2001	
New Markets Team Folder				
Foundation Team Folder				
Foundation "Wish List" (Foundation Stuff.doc)	20 kb	Michael Heining	11/15/2001	
Document management specs				
Document mgmt spec - DRAFT FOR REVIEW (Document Management_2001Dec14.doc)	230 kb	Leslie Orgera	01/07/2002	
DesignMeeting-Oct1-Handout (GeneralStrategyOverview_Case_20010928.doc)	117 kb	Leslie Orgera	10/01/2001	
Managed Service Provider overview (MSPOverview.doc)	78 kb	Leslie Orgera	10/01/2001	
Feature Analysis- Team Reporting (TEAMReportingFeatureAnalysis.doc)	115 kb	Sara Watts	01/17/2002	



To add a new item to Shared Files, be sure that the file exists somewhere on your computer, then click the Add File or Add Multiple Files button. The resulting window provides a Browse button so that you can locate and select the file from its current location. You may change both the name and description of the file, if desired, but be sure that you click the drop-down list (in the Destination box) to select the correct position in the Shared Files structure for this item to be stored. Click Upload to post the file.

Document Versioning

Document Versioning is a separately-available feature that allows you to keep multiple, edited copies of the same document without compromising the original. Each version is dated and stamped with the name of the person who made the edits, then stored as a numbered version of the original. Versioning is available for each document through the edit pencil icon opposite the document name. To turn on versioning for a specific item, click the checkbox, then the Save button at the bottom. Click the edit pencil again and a Version Directory becomes available, where you may check out the document, placing it in a convenient spot on your own computer. When the edits are complete, return to the Version Directory and check in the document. It will be saved as a new entry in the Version Directory, also displaying any comments you wish to add.

Links

The Links section displays the three most recently posted links. To see the complete list, click the Links section title. This section allows you to store in a readily-accessible place those links that would be of most use to your Team members. To add a new link, be sure that you have copied the URL of the site you wish to be linked to, then click the New Link button on the upper right. Enter a title or description of the link, then past the URL into the Web Address box. You may also select icons to accompany the link from the existing list or from the Media Library (see Media Library below). The checkbox at the bottom allows you to e-mail all Team members about the availability of the new link.

Links Reorder New Link

Description	Web Link	Created By	Created On	Edit	Delete
Casey Family Programs	http://www.casey.org	Brenda Russell	August 2, 2003		
CNN	http://CNN.com	Kent Overly	May 16, 2002		
IACVE	http://www.iacvb.org	Kent Overly	August 28, 2001		
Meeting Planners International	http://www.mpiweb.org	John Adams	July 10, 2001		
Professional Convention Management Association	http://www.pcma.org	John Adams	July 10, 2001		
Javits Convention Center (location of annual conference)	http://www.javitscenter.com/homepage/home.html	John Adams	July 10, 2001		

My View

My View, located under the main navigation links or under the My Teams tab, is a unique feature of Team™, acting as a personal center-of-operations page. It displays your individual status in each of four areas – Team, Digest, Upcoming Events and Tasks.



- ◆ **Team** – Lists all Teams in which you are a member and acts as a direct link to each.
- ◆ **Digest** – Each Team has an automated Team Digest that is sent to all subscribed Team members. In this area you can unsubscribe, if desired, or click to view the latest digest for each Team.
- ◆ **Upcoming Events** – Lists all Team events for the next 30 days and provides a link to the event details.
- ◆ **Tasks** – Lists each task that you have been assigned under one of the current projects, including task and project details, status, priority and due date.

Good Afternoon Joel | My Profile | Logout | Search | My Teams | Sites

Product Design Team TEAM Home | Calendar | News | Projects | Discussions | Shared Files | Surveys | Links

My View | Team Digest | Team Roster

New Team | Send Team Email | Chat

My View

Teams

[Code Push Team](#)

[Customer Implementation](#)

[Product Design](#)

Daily Digest
subscribe view

view 02/23/2004 9:00AM MST [Design Meeting](#)

view 03/01/2004 9:00AM MST [Design Meeting](#)

(Guest) 03/08/2004 9:00AM MST [Design Meeting](#)

03/15/2004 9:00AM MST [Design Meeting](#)

Upcoming Events

Task List sorted by priority

Name	!	✓	Due Date	Project
1: Doc pain and culture issues			10/09/2001	Identify Document Pain and Culture - Product Design

[Hide Done Tasks](#)

Team Digest

Each Team has an automated Team Digest that is e-mailed to each subscribed Team member whenever there have been additions or changes to the Team site content. To view the current Digest, click on the Team Digest link, located under the main navigation links. Using the date box on the upper right of the screen, you may also review previous editions of the Digest.

Good Afternoon Jan | My Profile | Logout | Search | My Teams | Tools

Annual Conference 2003 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

Team Digest: Tuesday, February 19, 2002 Date: 02/19/2002 [Go](#)

An update of what's new in the team

Visit the [team home](#) to keep up to date on the events that drive your team.

The following items were added:

News [more...](#)

Keep informed with what's happening with your team.

[Test Message - News Article](#)
Posted by Drew Di Giovanni

Projects [more...](#)

Keep your projects on track. Work together online.

[BlueStep Orientation](#)
Lead: Drew Di Giovanni
Starts: 02/19/2002
Priority: Normal
Ends: 03/04/2002

Links [more...](#)

Visit web sites that interest your team.

[2002 Annual Conference on the MGMA Website](#)



Team Roster

The Team Roster screen, accessed from under the main navigation links, not only provides a list of all current Team members, it displays their e-mail address link for easy mailing to selected Team members, plus a delete trashcan icon to remove them from the Team.

The Add Team Members button lets you select new members from all registered users in your system or all users who have been granted Team licenses. You may also invite individuals who are not already in the system by entering their e-mail addresses in the Add Additional Users box. Click Next and review the information. This second page also allows you to personalize the invitation message that will be received by the invitee. Clicking Save launches the e-mail invitation to your invitee that includes either your personal message or the default message and provides two links. The first link brings them to a data entry wizard which, when complete, creates a user record for that individual. The second link provides easy direct access to the Team homepage and can be saved on the invitee's 'favorites' list. Please note the Add Team to Favorites link at the upper right of the Team home page.

Send Team E-mail

The Send Team E-mail tab, located under the main navigation links, is an easy way to communicate with all members of the Team from a single screen. You may select all Team members, a few or just one, compose your message and click the Send button, allowing communication with any member without having to exit the Team.

Chat

Equally efficient as the Send Team E-mail tab is the Chat function. Without leaving Team, you may chat online with other members. To begin, simply click the Enter Chat link at the bottom of the page. In the subsequent window, begin your chat by clicking in the bottom frame (left of the Help button) and typing your message.

My Profile

It is important that each Team member be able to update portions of their own record information whenever needed, as often as needed. The My Profile link at the very top of the screen is provided to do just that. By clicking the My Profile tab, any logged-in user may quickly and easily edit their first name, last name, username, e-mail address and password. As with all data-entry or editing screens in Team, the Save button posts the information and makes the change permanent in the database.



event planning

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

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

New Team | Add Team Members | Send Team Email | Chat

User Information

* Required

First Name: * Username: *

Last Name: * Email Address: *

Change Password

Password *

Confirm Password *

* Required

Administration Functions

If you have been designated a Team Admin, the main navigation bar will display an Admin tab at the far right end. Clicking or mousing over this tab produces a list of administrative functions that will help you manage your Team site.

- ◆ **Information and Permissions** – Allows you to name the Team and create a Team message that will appear on the upper left of the home page, beneath the logo area. If you have purchased our partnered OneStat site statistics module, this is the page where you will activate the statistics program that has been set up for you. You can also decide if you will permit Team members to invite additional members.
- ◆ **Title and Logo** – Lets you to inherit the title and logo of your organization's upper level unit or customize your own. The editor box allows you to enter and position text or graphics much as a word processing program does. Further down on the screen, you may choose to display logo images that have been loaded into your Media Library (see below).
- ◆ **Team Leads** – Allows you to designate multiple Team Leads and appoint one a Primary Admin. The Add Lead button opens a list of all licensed Team members and makes them available for selection as a lead.
- ◆ **Team Guests** – Any user within your organization may be added as a guest. This allows them viewing privileges and you may assign them permissions separately from your other Team members, but they may not be assigned tasks.
- ◆ **Media Library** – Stores pdfs and images of all types for use on the Team site or by Team members. The image or file must be located on your computer. The Add Files button at the top right opens a window where you may browse your computer until the correct file is located. Enter a description and click Upload. When complete, the image or file will be listed on the Media Library screen and wherever in Team a Media Library link is displayed. The entire contents of the library can be displayed as a slideshow by activation the magnifier icon.