Table of Contents

Welcome to

TeamBuilder

Version 1.1

Contents:

Conceptual Overview

TeamBuilder is a powerful team management tool. It allows teams of people working on multiple projects to work together in a tight, cohesive fashion - sharing information and resources. No longer will part of the team have to wonder if they have the latest information - with TeamBuilder - all of the team's information is on-line, and updated in real time.

TeamBuilder begins by allowing the team to define projects. An infinite number of projects can be designed and managed with TeamBuilder.

Then, for each project the team can define an unlimited amount of Phases. A phase represents a unique sub-division of a project. Phases may be as simple as Design, Build, Implement, etc. or perhaps much more complex.

For each define phase, the following knowledge objects can be tracked in TeamBuilder:

- Action Items
- Notes
- Ideas
- Documentation
- Scope Changes
- Development Log
- Templates

For each and every one of these key areas, the team can add and maintain data related to the area. For example, in the Action Item area, the team can add new Action Items that pertain to the particular Project and Phase.

Example:

New Action Item: Develop export functionality for General Ledger

Each knowledge item has a Status flag which indicates whether the item is still active. If for example, this Action Item is still valid (in this case we'd be interested in whether it was still open) we would make sure the Active checkbox is checked (this is the default). Once the item is no longer Active, we would simply uncheck the check box. This Active checkbox is very powerful. When an item is Active, it is highlighted in green in the various list boxes. When an item is inactive, it is highlighted in red. This makes it easy for the team to immediately see which knowledge objects are active.

Additionally, active and inactive objects are grouped together - so that all actives are together, and all inactives are grouped together.

Finally, each knowledge object supports a sequencing number - to allow the team members to more closely control the sequence in which the knowledge objects display in a list box. This allows the team to recognize that certain tasks are ordered in a very particular fashion.

Additionally, for each particular knowledge object - in this example the action item to "Develop export functionality for General Ledger" the team can embed documents and other registered OLE objects that apply to this Action Item. For example:

Action Item: Develop export functionality for General Ledger

Attached files:	Specification worksheet	(Excel format)
	Customer requirements	(Word format)
	Possible limitations	(Word format)

These files are stored completely within the database structure of TeamBuilder. They are immediately available to all team members. Additionally, each team member will see a small preview of the document prior to launching it.

Additionally, besides being able to attach documents to each Action Item, the team can attach Updates to each Action Item. Updates serve to keep the team informed on the status of the particular item. These updates are sorted in date order, so that the team can easily see the progression of updates.

Keep in mind, the functionality described above exists not only for the Action Item knowledge objects, but all knowledge objects.

There is one additional bit of functionality that is offered only for the Action Item knowledge object. That extra functionality is Time Entry.

About TeamBuilder

TeamBuilder is a powerful team management tool. It has been designed to allow a group of people working together on a project to share information in a manner that has been previously unavailable. This powerful workgroup tool is the first of its kind. Not only is it powerful, but it is extremely friendly. The entire system has been designed in a manner that maximizes user-friendliness.

Additionally, TeamBuilder is very fast. You will find that the program runs quickly even on older 486/100 computers. And of course, with the latest greatest Pentium II computers, it positively screams. This is due to the fact that TeamBuilder has been designed with the latest application development tools and processes. Unlike some programs that are interpreted each time they are run (and thus slow), TeamBuilder is completely a 100% compiled application.

Finally, you'll find that TeamBuilder is completely stand-alone and simple to install and maintain. Many workgroup applications are built on top of Lotus Notes, or other complex packages. Some require many additional .dll files to be installed and managed. Not so with TeamBuilder. The main TeamBuilder executable is completely stand-alone. There is only one additional executable file required - the report generator. Furthermore, there are only two data files to maintain. One contains all of the core data files, the other contains all of the embedded OLE objects that a team may wish to maintain.

In short, TeamBuilder is everything you could expect from a modern application. It is fast, small, powerful, full-featured, and user-friendly.

Tell Me About This Help File

This is an abbreviated help file that is designed to help you get started with TeamBuilder. I believe you'll find TeamBuilder easy and intuitive to use. This guide should have you on your way in just a few moments. Please take a few minutes to read through it carefully.

The registered version of TeamBuilder not only includes additional (and snazzier) reports, but also a full help file. For now, browse through this file, get to know TeamBuilder, use it to better manage your teams, and then register. You can't go wrong.

Getting Started

Here, in just a few easy steps, are the key details you need in order to get started:

Install TeamBuilder on a network, where all your team members can access it. The type of network is not terribly important. TeamBuilder has been successfully used on both Novell and Microsoft networks.

Go into TeamBuilder. From the Misc. menu option at the top, select the Support Files menu otption. Then, go into the *Phone Types* menu item. Here you will need to enter some Phone Types. What's a Phone Type? Glad you asked.

But first, a bit of an overview.

In TeamBuilder, you'll see lots of lists like the one in front of you. This one is empty - as are all the various lists when you begin TeamBuilder. You'll notice three buttons toward the bottom of the list. These buttons are *Insert*, *Change*, and *Delete*. Naturally, these buttons allow you to Insert, Change, or Delete records. You can also use the Insert, Enter, and Delete keys on your keyboard as a short cut. Sometimes you can also right mouse-click on the list, and get the same menu. Whichever method you use, you'll be able to accomplish the same goal.

One more point, sometimes TeamBuilder knows you really shouldn't delete a record. Suppose you've assigned Jim a bunch of tasks on the XYZ Corp. project. Additionally, Jim has been responsible for many Notes and Ideas. If Jim leaves the project, you don't really want to delete Jim's record. Doing so, would require TeamBuilder to delete all of Jim's tasks, notes, and ideas. Instead, TeamBuilder will tell you that there are related records - and that a delete is not possible. You'll need to go assign those records to someone else first - and then delete Jim. Its just TeamBuilder's way of helping you avoid mistakes.

Back to the subject at hand…. each Team Member can have multiple phone numbers. TeamBuilder allows you to organize their phone numbers into different types. Each person may have different types of phones - a home, office, fax, pager, cellular, etc. phone. Simply add the types of phone types that you'll need. If you can't think of all the types you'll need now - just enter a few for now - you can always add more later.

Additionally, you'll be able to assign each team member to an organization. For example, Joe may belong to XYZ, Corp. while Susan may belong to ABC corporation. You can also organize the phone numbers for organizations with this same list of phone types.

Second, from the same Misc. menu option, Support Files sub-option, go into the *Address Types* menu item. Those same organizations we mentioned above can have lots of different addresses. There may be Corporate, Mailing, Field Office, etc. addresses. Use this option to enter the various address types you anticipate needing. Again, you can always add more later.

Third, now go back and add some Time Categories. Follow the same menu path and select Time Categories. When you add action items for team members to complete, they'll have the opportunity to note how much time it took to complete the action items. These categories will help them record their time. Use these categories however you wish. You may wish, for example, to capture the following types of time: Configuration, Meetings, Travel, etc.

Fourth, let's go back to the same menu structure and enter Functional Areas. Functional Areas give you a chance to assign each team member to a functional area on the project. Suppose Jim is on the technical team and Susan is on the Accounting team. This gives you a chance to make that distinction.

Ok - that's all there is for the base configuration. Let's get to the fun stuff.

First, notice that on the main screen there are buttons across the top. Click on the one that says "Orgs". This will give you a chance to define some Organizations that your team members may belong to. Click the Insert button to add a new organization. Notice that there are now tabs across the top of the screen. With these tabs you can add Addresses and Phones. There's also a tab for People. This screen allows us to view the people that are in our organization - and add new people to our organization - but let's hold off on that for now. Enter all the organizations you need, and then close out of these boxes.

Second, from the main screen select the button that says "People". You'll notice that your list of team members is blank. This is because we've not yet defined any people. Press the insert button on the screen, and let's add a person. You'll now have a chance to enter a team member's name. Use any format for the name that you wish (first name last or last name first), but just be consistent… it will make life easier for you. However, if you change your mind later, or need to update the spelling of a team member - TeamBuilder will keep all the person's data attached to his or her name.

Next, enter an organization and a functional role. You should recognize the lists that appear. TeamBuilder uses the same lists that you entered earlier. If you don't see the proper information - just go back to the Misc. menu and add some more items. When you're done enter all the team members, just close out of these screens.

Now, click the button on the main screen that says "Master View".

You'll see four lists on the screen. The first list says "Projects". The one to the right says "Project Attachments". Below that you'll find "Phases" and "Phase Attachments"

TeamBuilder can accommodate an unlimited number of simultaneous projects. And for each project, TeamBuilder can accommodate an unlimited number of phases. You can define these phases anyway you like. For each Project and each Phase, you can enter an unlimited number of file attachments.

File attachments are OLE documents that are embedded into the actual database of TeamBuilder. In this manner, they are easily accessible to all team members. Here's an easy way to get documents into TeamBuilder. Let's assume you have Microsoft Word on your teams' computers. Go into Word, and open a document that you would like to move into TeamBuilder. Perhaps it describes some key aspects of this project. When the document is in Word, hit Ctrl-A to highlight the entire document. Or, you can use the Word menu path Edit, Select All. Now hit Ctrl-C (or menu path Edit, Copy) in order to copy this document to the clip board.

Switch over to TeamBuilder and use the insert key on the project attachments list to create a new record. Press the copy button and the document will be copied into TeamBuilder.

Provide a short summary of the document. Notice also that a small image of the document will be provided for you. Hit the OK button on the screen and you'll save the document into the database.

To launch the document, just navigate to the document you wish, and press the Launch! Button. Make changes as necessary and then just exit the document's application. The document will automatically update the files in TeamBuilder. In this way, TeamBuilder integrates very nicely with your documentation and applications.

Note: make sure that all team members have the proper version and application to access the documents you are saving in TeamBuilder.

Finally, notice that for each phase, there are 8 Knowledge Object Categories across the top of the screen - one on each tab. Navigate to these. Again, you will be able to add basic details (such as Action Items, Notes, Ideas, Status Reports, etc.) as well as embed related files.

And you will also be able to add updates to each and every Knowledge Object - so that each team member can share in the full knowledge of the project.

Explore the rest of TeamBuilder - there's more than we've introduced you to here. Be sure to check out the reports as well. And when you determine that TeamBuilder will truly Unlock the Power of Team Management for your organization - register for the full version of TeamBuilder. It includes the full help system and full complement of reports.

Registration

You are licensed to evaluate TeamBuilder for 30 days. After that time, you need to register or cease use of TeamBuilder.

If you decide that your organization can benefit from the power of TeamBuilder, we ask that you register. If not, please drop us an email and tell us what features you think TeamBuilder needs to meet your needs. We'll see if we can help. Reach us at the email or snail mail address below.

We've tried to keep registration simple and fair. Our pricing is $50 per team member. If you have 8 team members that will benefit from TeamBuilder's power, the total registration cost is just $400 plus applicable taxes. Quantity discounts and site license agreements are available.

The registered version will not only make you legal, but will give you the full help file, and a more robust suite of reports.

To register, or for more information, contact David Watts Jr. at davidwattsjr@yahoo.com or via snail mail at:

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