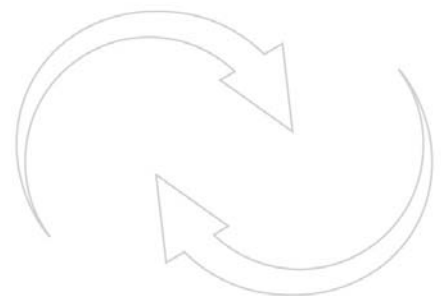




Product Details

Livelink virtualteams

Release 1.2
31 May 2004



Great Minds Working Together™

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A Changing Environment

Today's business environment is radically different from the one that existed only a few years ago. Adapting to rapid change is a constant challenge in every market, industry and organization.

With budgets under close scrutiny, travel restrictions are limiting people's ability to meet face-to-face. As more and more organizations strive to build a global presence, people must work together, regardless of location. Work groups comprised of experts situated in different locations, organizations, countries, and time zones have become the standard for conducting business.

The need for companies to collaborate both internally and externally has never been stronger. Companies are returning to their roots, doing what they do best, and "ordering out" for the rest. By focusing on their core competencies, organizations can build even stronger networks with their suppliers, distributors, and customers.

To remain competitive in the current climate, companies must act quickly to capitalize on market opportunities. The market leaders are those who can innovate the fastest and reach the customer with superior products and services before the competition. Cross-organizational learning speeds the development process by enabling work groups to apply lessons learned from previous projects to future ones. Companies who share expertise across their enterprises are able to reduce development costs and improve their time-to-market. By significantly shortening cycle times, market leaders emerge.

Globalization, which was once a term used to describe a company's multi-national location strategy, is fraught with many challenges. Companies are tasked with adapting geographically dispersed operations to each local environment while still maintaining the corporate culture throughout the organization. More and more companies are forming virtual work teams to improve communications and integrate diverse perspectives.

While there are many technologies that support collaboration among distributed work groups, organizations still face difficulties building online work environments. What is lacking in most online workplaces is a proven methodology for getting work done. Developing such a methodology and then applying it to everyday processes ensures that the output of every team adheres to the company's overall strategy. By sharing information across the enterprise, virtual teams naturally build their own knowledge bases that are consistent with the rest of the company. Instead of knowledge sharing being an extra step for a team, isolated from the knowledge of all other teams, it becomes the accepted way to work for everyone. The result is a well-integrated, highly responsive organization whose employees can act quickly to form intelligent work groups—regardless of location.

Livelink virtualteams

Open Text's Livelink virtualteams™ enables people to work together effectively and efficiently across geographical and organizational boundaries. The module combines technology and methodology to create online workspaces for high-performance virtual teams and inter-company networks—inside an enterprise knowledge management system. Unlike other collaboration solutions, Livelink virtualteams uses technology to leverage and support the human side of collaboration.

To encourage people to work together, Livelink virtualteams delivers tools, utilities, content, and support in an intuitive, easy-to-use environment. Designed for the single team as well as the multi-team program, Livelink virtualteams scales to address both enterprise-wide and inter-enterprise collaboration.

Livelink virtualteams is based on the principles and practices developed over the past twenty years by Jessica Lipnack and Jeffrey Stamps, world-renowned experts in collaboration. Based on years of research and practice with the world's largest global companies and nonprofit organizations, Lipnack and Stamps have identified what it takes for any team to work successfully online. These findings have been translated into Livelink virtualteams, a Web-based module that provides the place, process, and online structure for teams to do their work.

The module supports their unique 7-Step Virtual Team Launch Process™ that walks teams through the critical initial stages of setting up a virtual work team. Using interactive tools, a team defines its purpose and goals, identifies and tracks members and their tasks, and maintains its agreements. The information generated by the team then populates its own distinctive Web-based environment, automatically customizing each team's "room" to its specific work. This area provides a number of features for working together effectively online, including the ability to hold both synchronous and asynchronous meetings and discussions, share documents, track progress, notify relevant parties of new developments, monitor accountabilities, and quickly bring new project members up-to-speed.

Benefits

Livelink virtualteams provides the following benefits:

- **Proven Virtual Teams Methodology™ embedded in collaboration technology provides the necessary ingredients for virtual team success.** Developed by Lipnack and Stamps, the Virtual Teams Methodology, which is the basis for Livelink virtualteams, helps teams identify the critical success factors for virtual work. The methodology provides principles, practices, and tools that make it easy and enjoyable for teams to work together online.
- **Embedded principles, practices, and tools enable teams to produce results faster and eliminate the *blank page* problem that plagues most teams using collaboration software for the first time.** New teams are typically offered an empty folder as a starting place, leaving them wondering, "What now?" Livelink virtualteams includes a simple 7-Step Virtual Team Launch Process that enables team members to quickly create work plans and generate shared views of all project-related information so they can get to work right away.
- **The structure of the team room and ease of navigation improve the operating efficiency of teams.** Livelink virtualteams' consistent navigation system and user-friendly interface highlights categories of information common to all teams, such as People, Purpose, Links, Time, and Meetings, and provides a flexible container for organizing the information (Content) specific to each team. This eliminates the typical clutter of online team spaces by storing team-specific information in the same place in each team room.
- **Improving collaboration among the right people at the right time—regardless of location, results in increased innovation.** Team members have access to a secure, Web-based work area that is available 24x7 to meet and store project-related information in an organized manner. The team room creates a sense of place for dispersed members;

fosters team identity; makes work visible; captures results in context; supports interactions before, during, and after meetings; and provides current snapshots of team progress.

- **Team knowledge is shared across the enterprise.** Team information, including its purpose, members, operating agreements, meeting records, and most recent versions of team products are all captured directly in the enterprise knowledge management system in one step, making the information readily available for future reuse.
- **Team membership can extend to people outside the enterprise, making it easy to collaborate with partners, customers, consultants, and suppliers.** Livelink virtualteams works with standard Web browsers and requires no complex configuration to support users on both sides of the firewall.
- **Integrated meeting support ensures productive meetings by capturing output in team rooms and making it available to the knowledge management system.** Livelink virtualteams' team room provides a meeting place that combines asynchronous activities with real-time activities, such as conference calls, allowing team members to simultaneously move around the room. The structure of the team room accelerates user adoption and allows for improved levels of team performance.
- **The powerful combination of Livelink virtualteams with Livelink MeetingZone™ makes real-time Web conferencing facilities available to teams—directly from their own team room.** Livelink MeetingZone is an optional Livelink module that supports application sharing, electronic whiteboard, instant messaging, real-time chat, and more. Together with Livelink, Livelink virtualteams and Livelink MeetingZone provide virtual teams with everything they need to get their work done quickly and effectively.

Virtual Team Room for Distributed Work

Livelink virtualteams is a comprehensive team environment built on Livelink, Open Text's fully Web-based collaboration and knowledge management application. Livelink virtualteams combines a proven methodology for working virtually with state-of-the-art collaboration technology.

Livelink virtualteams provides an integrated online area, or team room, that:

- Creates a sense of place for distributed teams.
- Fosters team identity.
- Makes team work visible.
- Captures results in context.
- Supports interactions before, during, and after meetings.
- Provides current snapshots of team progress.

Livelink virtualteams supports the Virtual Teams Methodology developed by Lipnack and Stamps and incorporates principles, practices, and processes in a six-sided team room. The four basic principles of networks and virtual teams—People, Purpose, Links, and Time—represent four of the walls. The room's structure encourages teams to define best practices, such as developing and observing operating agreements and holding regular, organized online meetings. The team room also supports processes that promote exceptional teamwork, including the 7-Step Virtual Team Launch Process.

Livelink virtualteams is designed from a lifecycle perspective. New teams typically start out with very little information at their disposal and must then work to develop and articulate their purpose. While this can sometimes be a time-consuming process, teams that plan carefully at the beginning go on to deliver results and meet milestones, eventually wrapping up projects and archiving the information for years to come. The team room shortens project lifecycles by providing team members with a clear framework for addressing the critical early steps of team development. Livelink virtualteams displays information as it is generated, making it easy for teams to manage themselves and move from one phase to another. For ongoing teams, the room changes over time as a result of budget cycles, new planning, and changes in leadership.

A Collaborative Teaming Environment

Levels of Use

Livelink virtualteams supports three types of users:

1. Team members—people who use their team rooms on a daily basis.
2. Team leaders and facilitators—people responsible for setting up, launching, and sustaining virtual teams.
3. Executives and Program Managers — people concerned with the consistency and effectiveness of multiple projects within a program or across the enterprise.

These three types of users correspond to Livelink's three workspaces. Each workspace contains specific types of information and allows users to access all of Livelink's core functionality. These spaces emulate the way people work as individuals, in teams and across organizations.

1. Enterprise Workspace—An area for the corporation to publish and organize information and knowledge.
2. Team Workspace—An area where virtual teams can collaborate, assign tasks, review documents, have discussions, and so on.
3. Personal Workspace—A customizable area where users can add and modify items, or access pages that contain information specific to them (For example, News, Tasks, Agents, and Projects.)

The Benefits of Collaboration

Livelink virtualteams promotes and supports the virtual teaming environment, helping organizations to realize both bottom-line and top-line benefits.

- Livelink virtualteams reduces costs by:
 - Cutting travel costs and time
 - Creating economies of scale
 - Designing improved, digitally-enhanced processes
- Livelink virtualteams shortens cycle times by:
 - Moving from serial to parallel processes

- Establishing better communications
- Promoting trust, which expedites information sharing and decision-making
- Livelink virtualteams increases innovation by:
 - Permitting more diverse participation
 - Stimulating product and process creativity
 - Encouraging new business development synergies
- Livelink virtualteams leverages learning by:
 - Capturing knowledge throughout the project lifecycle
 - Gaining wider access to expertise
 - Sharing best practices

Livelink virtualteams also delivers many benefits to geographically dispersed teams. Livelink virtualteams:

- Eliminates the *blank page* problem for teams by providing tools that support a launch process that automatically creates a customized team room.
- Fosters team identity by providing a personalized room where distributed teams with limited or no face-to-face interaction can meet and interact.
- Reduces confusion by making the purpose of the team explicit by providing members with high-level and detailed views of the mission, goals, and tasks.
- Creates clarity through its internal structure based on the articulation of goals and assignment of a subset of members.
- Presents the big picture as it unfolds over time by highlighting specified goals, results, and milestones.
- Enhances communications by supporting both synchronous and asynchronous connections.
- Provides a perpetual and consistent meeting place through a Web-based facility that supports best practices before, during, and after meetings that can be used with real-time audio, video, or Web conferencing.

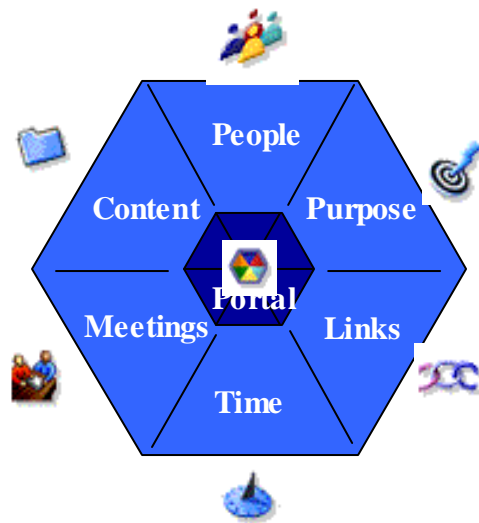
The module also delivers personal benefits, including:

- The ability to be brought quickly up to speed on team progress, structure, processes, history, agreements, and meetings.
- Reduced complexity for people on multiple teams and executives with cross-team responsibilities provided through a clear, intuitive architecture for team structure and process.
- Increased flexibility through the creation of work environments that easily support users working anywhere, any time.

Components of the Virtual Team Room

Livelink virtualteams is an online room with six walls representing six themes: People, Purpose, Links, Time, Meetings, and Content. For example, tools and information related to people and groups appear on the People Wall.

Livelink virtualteams has a navigation system that serves as a consistent interface for categories of information common to all teams (People, Purpose, Links, Time, and Meetings) and provides a flexible container for organizing the information unique to each team (Content).



This architecture eliminates the typical clutter of online team spaces. Many team spaces often combine the unique contents of the team's work, for example "Product Specification Version 8.4" with the general information required to support the team, for example rosters, task lists, meeting minutes, and operating agreements. In Livelink virtualteams, common team information appears in the same place in the room for all teams. This makes it easier for:

- New members to get up to speed quickly.
- People who are members of multiple teams to find their way around different team rooms.
- Executives and program managers with cross-team responsibilities to efficiently review information about each team's progress.

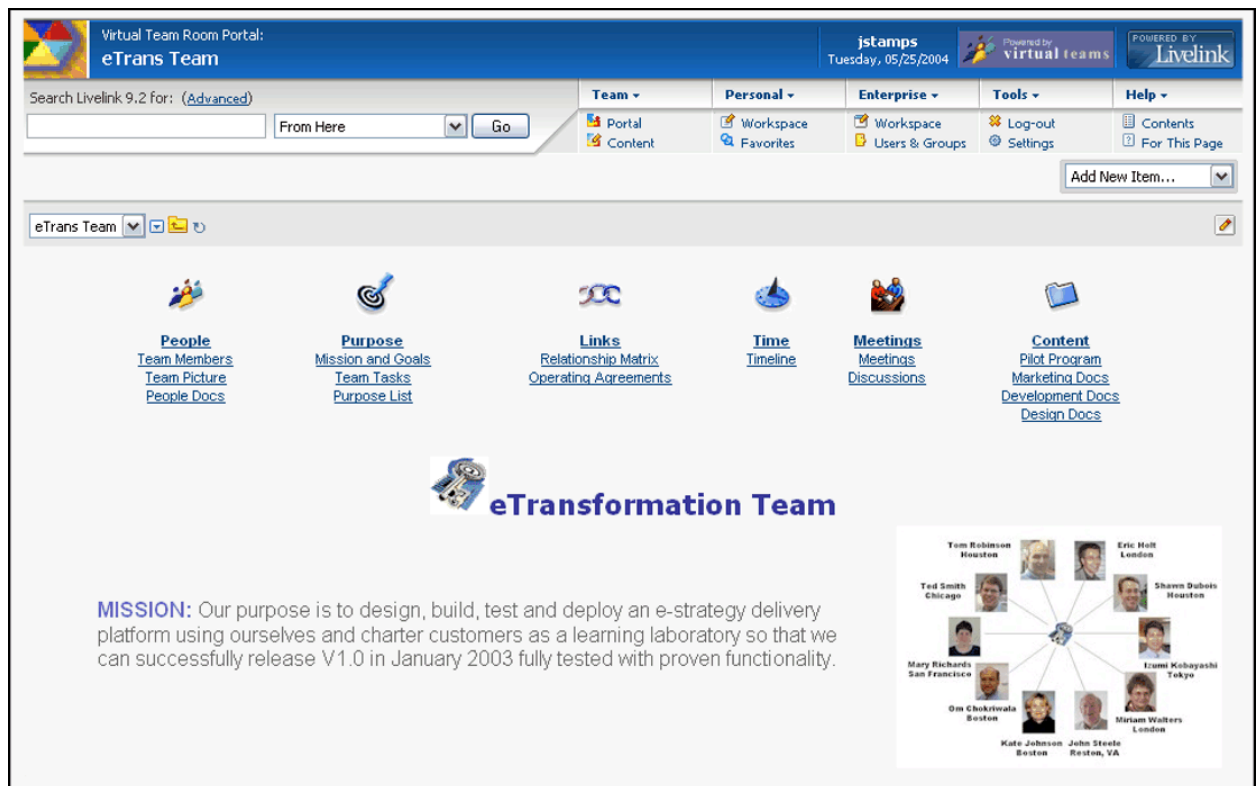
While the *walls* of the room identify specific categories of team information, they also allow teams to customize the walls through the use of tabs. You can access each of the room's built-in tools through a tab, and teams can add their own tabs to each of the walls to further customize their workspaces. Tabs display such items as documents, database reports, and folders. As a team moves from one phase to the next, you can change the default tab for each wall to highlight different displays.

Portal

All teams need a sense of place and a means to communicate their shared identity across the enterprise. With Livelink virtualteams, you establish team identity at the front door, via a Portal.

The Portal links all major parts of the room, including key documents and any other destinations deemed important to the team. The Portal acts as the team's Web site home page, communicating the group's public identity and providing a visual map of the major components of the shared workspace.

The Virtual Team Room navigation bar, which appears on every wall, provides access to the major sections of the room. On the Portal wall, links go directly to the tabs on each wall. With the exception of the Content wall, you can create new tabs on all of the walls that appear on the Portal wall.



You can customize the Portal by displaying a logo or other image, a news channel, or by cataloging key documents, folders, and URLs. You can further customize the Portal by displaying a simple HTML page beneath the navigation bar.

The People Wall

Virtual teams are highly connected organizations. Because people who work in distributed groups lack traditional ways of getting to know one another, they need ways to gain information about

who is involved with which aspects of a particular project. The People Wall displays information about the people and organizations related to the team.

Team Members

Most team applications provide a team roster of names; others only offer a list of participant user names. With such limited information, people find it difficult to get to know one another and to learn how their team relates to the rest of the organization.

With Livelink virtualteams, you define team membership through the Team Members Table. (To be added to a team, members require a Livelink username and password.) The Team Members Table displays information about people's home organizations, their physical locations, time zones, roles, and e-mail addresses. E-mail addresses are hot-linked to each person's e-mail system, making it simple to e-mail the entire team or any subset of the team.

The Team Role field of the Table is not just informational, but demonstrates how these methodology-enriched tools encourage good team practices. To complete the Team Members Table, the team engages in discussion and negotiation about each member's specific role. Through discussion about goals and desired results, the team may discover that they need to create a new role and then recruit to fill the role.

The Team Member Table frames membership in terms of *Rings of Involvement*, which represent the levels of involvement people have with teams. The successive rings are:

- **Core Team:** These are the team's essential and dedicated human resources. The team's mission cannot be achieved without this inner circle of people.
- **Extended Team:** People who play key roles at various points in team life, often as content experts.
- **External Network:** An outer ring of stakeholders who need to be kept informed, people who are links to additional expertise or resources, along with those who have political clout that the team may need to influence others.
- **Others:** Observers, guests, and other external players who may have limited access to the room and its functions.

Team Members						
Add/Edit Members		My Profile		Configure Tabs		
Name	Team Role	Organization	Location	GMT +/-	E-mail	
<input type="checkbox"/> Core Team						
<input type="checkbox"/>	Om Chokriwala	Subcontractor	Subcontractor	Boston, MA	GMT -05	om403@aol.com
<input type="checkbox"/>	Shawn E Dubois	Customer contact	Bell Chemicals	London	GMT	shawnd@bellchemicals.com
<input type="checkbox"/>	Kate Johnson	Training	Sharetech Prof. Svcs.	Boston, MA	GMT -05	kjohnson@sharetech.com
<input type="checkbox"/>	Izumi Kobayashi	Knowledge Manager	Sharetech IT	Tokyo	GMT +09	izumi@sharetech.com
<input type="checkbox"/>	Mary T Richards	Business development	Sharetech Bus. Dev.	San Francisco	GMT -08	mrichards@sharetech.com
<input type="checkbox"/>	Tom T Robinson	Team Leader	Sharetech	Houston	GMT -06	trobenson@sharetech.com
<input type="checkbox"/>	Ted Smith	Product marketing	Market Makers	San Jose, CA	GMT -08	tedosmith@marketms.com
<input type="checkbox"/>	John Steele		Sharetech Prod. Dev.	Reston, VA	GMT -05	jsteele@sharetech.com
<input type="checkbox"/>	Miriam Walters	Marketing leader	Sharetech Prof. Svcs.	London	GMT	mwalters@sharetech.com
<input type="checkbox"/> Extended Team						
<input type="checkbox"/>	Eric Holt	Business development	Sharetech Bus. Dev.	London	GMT	eric@sharetech.com
<input type="checkbox"/>	Carrie E Kuempel	Training director	NetAge, Inc.	Wellesley, MA	GMT -05	ckuempel@virtualteams.com
<input type="checkbox"/>	Connie West	friend		Dublin, OH	GMT -12	west@opentext.com
<input type="checkbox"/>	Fred Q Zimmerman	Customer contact	Zephyr Manufacturing	Houston	GMT -06	fredz@zephyr.com
<input type="checkbox"/> External Network						

Team members also have their own Profiles that they can modify and attach documents and pictures to. As on each of the walls, teams can add tabs to display pictures, network maps, and other documents related to people.

The Purpose Wall

A defined purpose is critical to all groups. Virtual organizations, however, are much more dependent upon clear articulation of purpose and alignment than are traditional face-to-face, hierarchical-bureaucratic groups. For virtual groups, a defined purpose:

- Holds the team together
- Ensures the smooth transition from a physical workplace to a virtual one
- Compensates for lack of hallway conversations

Purpose sparks life in virtual teams. To be effective, virtual teams must transform their purpose into action, using it as the backbone of their work and organization. Purpose clarifies the team's reason for being and motivates people to produce positive results. When made explicit, purpose provides the basis for measurements, results, and timeframe.

The Purpose Wall focuses on the why, what, and how of the team's work:

- Purpose at its highest level is defined by an overall mission.
- Mission segments into a set of Goals.
- Goals are accomplished through Tasks.
- By working through Tasks, the team delivers Results.

Mission and Goals

For most teams, and particularly for virtual teams, developing, modifying, and clearly displaying the purpose are as essential as they are difficult. Livelink virtualteams' Mission and Goals Tool helps a team to set up its overall purpose, providing a high-level view of the "what" and "why". You can record the team's mission when you initialize your Virtual Team Room, or you may originate and edit your purpose here.

Each goal has key fields, including Start/Due dates, Priority (High, Medium, Low), Status (Pending, In Process, Issue, On Hold, Completed, Cancelled), and Comment. You can add detail to the work required to accomplish the set goal as well as attach documents that outline specific results related to the goal. (We recommend the use of aliases to documents stored in the Content section of the room). You can also add URLs that point to results or resources that reside outside Livelink. The Tool provides you with the option to display Goals according to different status settings, e.g. Do not show completed or cancelled goals and to sort by different orders.

While a team may have one overall leader, many virtual teams benefit from shared leaders. Livelink virtualteams allows you to assign a goal to more than one person, in contrast to standard Livelink Tasks, which you can only assign to one person or group.

The screenshot displays the 'Mission and Goals' tool interface. At the top, there are tabs for 'Mission and Goals', 'Team Tasks', and 'Purpose List'. The 'Mission' section contains a text area with the following text: "Our purpose is to design, build, test and deploy an e-strategy delivery platform using ourselves and charter customers as a learning laboratory so we can successfully release V1.0 in January, 2005, fully tested with proven functionality." Below the mission is a 'Goals' section with a dropdown menu for 'Add New Item...' and a filter for 'Displaying: All Team goals with any Due Date whose Status is <Pending, In Process, Issue, On Hold, Completed, Cancelled>'. The main part of the interface is a table with the following columns: Type, Name, Functions, Assigned To, Due Date, Status, and Comments.

Type	Name	Functions	Assigned To	Due Date	Status	Comments
🔗	Create effective virtual project team	▼	trobinson Other	12/30/2004	In Process	Results - effective virtual team crossing corporate functions and integrating charter customers
🔗	Create integrated infrastructure	▼	ikobayashi , trobinson Other	02/28/2004	Pending	Results - established relationships with technology and hosting vendors
🔗	Design and develop v1.0 platform	▼	tsmith Other	06/30/2004	In Process	Results - v1.0 in market and installed at customer sites by June 2002
🔗	Develop and deliver marketing plan	▼	mwalters Other	08/10/2004	Pending	Results - marketing plan, collateral, PR, sales training
🔗	Develop pilot feedback process	▼	tsmith Other	04/07/2004	Pending	Results - feedback plan
🔗	Integrate development with Product Roadmap	▼	trobinson Other	09/17/2004	Pending	Results - company product council approves product plan
🔗	Support pilots and product roll out	▼	kjohnson , tsmith Other	12/29/2004	Pending	Results - agreed product support plan, average ratings of 4 out of 5 on customer support

Purpose List

In many online team workplaces, it is difficult to get a comprehensive view of the team's work. The Purpose List Tool provides a hierarchical view of all the goals and tasks, allowing them to be edited and sorted. While the formal structure of the work is facilitated through the mission-goal-task relationship, you can set up ad hoc Tasks to track actions and issues, such as action items agreed to in meetings.

Name +	Functions	Assigned To	Due Date	Priority	Status	Creator
Create effective virtual project team	<input type="checkbox"/>	trobinson others...	12/30/2004 03:00 PM	High	In Process	jstamps
<input checked="" type="checkbox"/> Set up teleconferences through end of year	<input type="checkbox"/>	ckuempel	03/01/2002 12:00 PM	Low	Completed	jstamps
<input checked="" type="checkbox"/> Team Launch	<input type="checkbox"/>	Coordinators	02/05/2002 12:00 PM	High	Completed	jstamps
<input checked="" type="checkbox"/> Create integrated infrastructure	<input type="checkbox"/>	ikobayashi , trobinson others...	02/28/2004 04:00 PM	Low	Pending	jstamps
<input checked="" type="checkbox"/> Executive welcome memo	<input type="checkbox"/>	jstamps	02/04/2002 12:00 PM	Low	Pending	jstamps
<input checked="" type="checkbox"/> Design and develop v1.0 platform	<input type="checkbox"/>	tsmith others...	06/30/2004 03:00 PM	High	In Process	jstamps
<input checked="" type="checkbox"/> Create design document	<input type="checkbox"/>	jstele	03/30/2002 03:00 PM	Medium	In Process	jstamps
<input checked="" type="checkbox"/> Develop implementation plan	<input type="checkbox"/>	<Not Assigned>	10/05/2002 11:00 AM	Medium	Pending	jstamps
<input checked="" type="checkbox"/> Formulate design options	<input type="checkbox"/>	<Not Assigned>	07/05/2002 11:00 AM	Medium	Pending	jstamps
<input checked="" type="checkbox"/> Gather requirements	<input type="checkbox"/>	jstamps	06/05/2002 11:00 AM	High	Pending	jstamps
<input checked="" type="checkbox"/> Integrate draft requirements doc	<input type="checkbox"/>	<Not Assigned>	05/05/2002 11:00 AM	Medium	Pending	jstamps
<input checked="" type="checkbox"/> Interview customers	<input type="checkbox"/>	<Not Assigned>	04/15/2002 11:00 AM	Medium	Pending	jstamps
<input checked="" type="checkbox"/> Form design sub-team	<input type="checkbox"/>	Coordinators	02/10/2002 03:00 PM	Medium	Pending	jstamps
<input checked="" type="checkbox"/> Product launch go/no go decision	<input type="checkbox"/>	trobinson	09/01/2002 01:00 PM	High	Pending	jstamps
<input checked="" type="checkbox"/> Specification Sign Off	<input type="checkbox"/>	trobinson	03/20/2002 01:00 PM	Medium	Pending	jstamps
<input checked="" type="checkbox"/> Develop and deliver marketing plan	<input type="checkbox"/>	mwalters others...	08/10/2004 01:00 PM	Medium	Pending	jstamps
<input checked="" type="checkbox"/> Create first draft of marketing plan	<input type="checkbox"/>	mwalters	06/07/2002 01:00 PM	Medium	Pending	jstamps

Team Tasks

The Team Tasks Tool displays all the tasks in the team room. As with goals, tasks may be filtered and sorted on a variety of parameters. This listing is very useful when, for example, a team is meeting online and reviewing tasks sorted by date and status. The Location column indicates that the Task is associated with a goal, or is an ad hoc task in a general team Purpose List.

Type	Name	Functions	Due Date	Priority	Status	Assigned To	Location
<input checked="" type="checkbox"/>	Collect pilot feedback	<input type="checkbox"/>	07/09/2002	Medium	Pending	sdubois	Develop pilot feedback process
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Create design document	<input type="checkbox"/>	03/30/2002	Medium	In Process	jstele	Design and develop v1.0 platform
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Create first draft of marketing plan	<input type="checkbox"/>	06/07/2002	Medium	Pending	mwalters	Develop and deliver marketing plan
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Develop implementation plan	<input type="checkbox"/>	10/05/2002	Medium	Pending	<Not Assigned>	Design and develop v1.0 platform
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Executive welcome memo	<input type="checkbox"/>	02/04/2002	Low	Pending	jstamps	Create integrated infrastructure
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Form design sub-team	<input type="checkbox"/>	02/10/2002	Medium	Pending	Coordinators	Design and develop v1.0 platform
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Formulate design options	<input type="checkbox"/>	07/05/2002	Medium	Pending	<Not Assigned>	Design and develop v1.0 platform
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Gather requirements	<input type="checkbox"/>	06/05/2002	High	Pending	jstamps	Design and develop v1.0 platform
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Get support rep on team	<input type="checkbox"/>	06/15/2002	Low	Pending	<Not Assigned>	Support pilots and product roll out
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Integrate draft requirements doc	<input type="checkbox"/>	05/05/2002	Medium	Pending	<Not Assigned>	Design and develop v1.0 platform
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Interview customers	<input type="checkbox"/>	04/15/2002	Medium	Pending	<Not Assigned>	Design and develop v1.0 platform
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Product launch	<input type="checkbox"/>	10/01/2002	Medium	Pending	tsmith	Develop and deliver marketing plan
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Product launch go/no go decision	<input type="checkbox"/>	09/01/2002	High	Pending	trobinson	Design and develop v1.0 platform
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Respond to Bell Chemicals crisis	<input type="checkbox"/>	04/05/2002	High	Pending	Coordinators	Purpose List

Individuals can track their own team assignments by sorting on the Assigned To heading of the Team Tasks Tool. Members of more than one team can track their task assignments from all rooms via Livelink’s Personal Workspace.

The Links Wall

Developing and maintaining connections and relationships with team members are constant challenges for virtual teams. The Links Wall displays and organizes a team’s relationships and agreements. It makes visible to all involved parties the relationships that you need to establish in order to work together, including leader and follower relationships. It is here that teams develop and display Operating Agreements that help to create a sense of trust amongst team members.

The Relationship Matrix

Virtual teams constantly need to be aware of who is doing what on a particular project. The Relationship Matrix displays the connection between the people and the work. It also provides a view of the team's shared leadership. This matrix is dynamically generated from the input of Goals (on the Purpose Wall) and the core team (People Wall). Collaboratively mapping people to high-level goals helps facilitate team buy-in to its shared purpose. Establishing the links between people and work:

- Assigns clear leadership and accountabilities.
- Clarifies roles.
- Naturally forms goal-driven sub-teams.

This process helps teams to overcome obstacles, plan communications, and increase everyone’s sense of ownership in the final outcome.

The screenshot shows a web interface for a Relationship Matrix. At the top, there are tabs for 'Relationship Matrix' and 'Operating Agreements'. Below the tabs, a filter bar indicates 'Displaying: All Team goals with any Due Date whose Status is <Pending, In Process, Issue, On Hold, Completed, Cancelled>'. The main table has columns for 'Goals', 'Core Team' (with sub-columns for 'Leader' and 'Member'), and 'Other Assignees'. The 'Core Team' members listed are tsmith, sdubois, ochokriwala, mwalters, mrichards, kjohnson, jsteale, ikobayashi, and trobinson. The 'Other Assignees' column lists drumpel, rhodes, and borntzen, jirnak, cwest. The table contains several rows of goals with icons indicating leadership or membership assignments.

Goals	Core Team									Other Assignees
	tsmith	sdubois	ochokriwala	mwalters	mrichards	kjohnson	jsteale	ikobayashi	trobinson	
Create effective virtual project team	Member	Member	Member	Member	Member	Member	Member	Member	Leader	drumpel
Create integrated infrastructure	Member						Member	Leader	Leader	
Design and develop v1.0 platform	Leader	Member					Member		Member	rhodes
Develop and deliver marketing plan	Member			Leader	Member				Member	
Develop pilot feedback process	Leader	Member				Member				
Integrate development with Product Roadmap					Member				Leader	
Support pilots and product roll out	Leader			Member		Leader		Member	Member	
Test beta functionality with two charter customers		Member	Member		Leader			Member		borntzen, jirnak, cwest

Sub-teams naturally form among the people listed in the horizontal rows of the matrix. The vertical columns provide a framework for discussing load-balancing and shared leadership.

In later stages of a group's life, or in an ongoing team situation, this Tool serves as a Responsibility Matrix. It provides a consistent, very visible, high-level map of who is accountable for what in accomplishing the overall mission.

Operating Agreements

Whether implied or explicit, all highly effective teams create norms. Operating agreements set expectations and guide team behavior. Creating operating agreements is a fundamental, but often skipped, step in launching a virtual team.

The Operating Agreements Tool helps a team formulate and display a set of explicit operating agreements to achieve its mission. The Tool emphasizes how the team schedules and manages regular meetings as well as its asynchronous activities. It supports agreements for communication responsiveness and other areas, such as the use of e-mail and the team room. While the Operating Agreements Tool provides recommended categories for agreements, the team also can add new categories.

The screenshot shows a web application interface with two tabs: "Relationship Matrix" and "Operating Agreements". The "Operating Agreements" tab is active. At the top right, there is a "Configure Tabs" button. Below the tabs is a table with columns: "Agreement", "Note", "Last Modified", and "Edit". The table contains several rows, each representing an agreement. The first row is under the category "Regular Meetings" and describes weekly teleconferences. The second row is a note about rotating note takers. The third row is about bi-weekly meetings. The fourth row is under the category "Regular Asynchronous Activities" and describes task updates. The fifth row is another note about topical discussions. The sixth row is under the category "Responsiveness and Availability" and describes vacation protocols. Each row has a "Last Modified" date and a user name, and an "Edit" icon.

Agreement	Note	Last Modified	Edit
Category: Regular Meetings			
Weekly Teleconferences on Tuesday 7:00 AM San Fran, 9:00 AM Houston, 10:00 AM Boston, 3:00 PM London, 11:00 PM Tokyo. Conference call number 800-567-2332 pass code transform leader Tom Robinson.	Core members are expected to attend, let someone know if you can not attend. Team will have a standard agenda, and set topics for the next week the week before. This was agreed to at the Oct 20 weekly meeting.	03/04/2003	jstamps
Note taking for regular meetings will rotate between team members. Note taker will be selected at the beginning of each meeting.	Decided at Jan. 30 meeting.	02/01/2002	trobinson
Bi-weekly meetings to be attended by all team members	All must attend or send a representative	04/14/2002	jlpnack
Category: Regular Asynchronous Activities			
Team members will update their tasks, and Goal leaders will update the goals each week 12 hours prior to the weekly meeting.	Will review at Feb. 25 meeting	05/17/2002	ckuempel
Topical discussions will be determined in weekly meetings. Everyone agrees to review at least two days before next meeting.		02/01/2002	trobinson
Category: Responsiveness and Availability			
Team members will let other team members know when on vacation. Otherwise, team members expected to read email and answer voicemail at least once every 24 hours.	Proposed and accepted at kickoff meeting.	02/01/2002	trobinson

Early in a team's life, while members are learning what behaviors work best for them, it is useful to discuss and appropriately modify agreements. In later phases, new members can quickly identify what behaviors are expected for successful group communication.

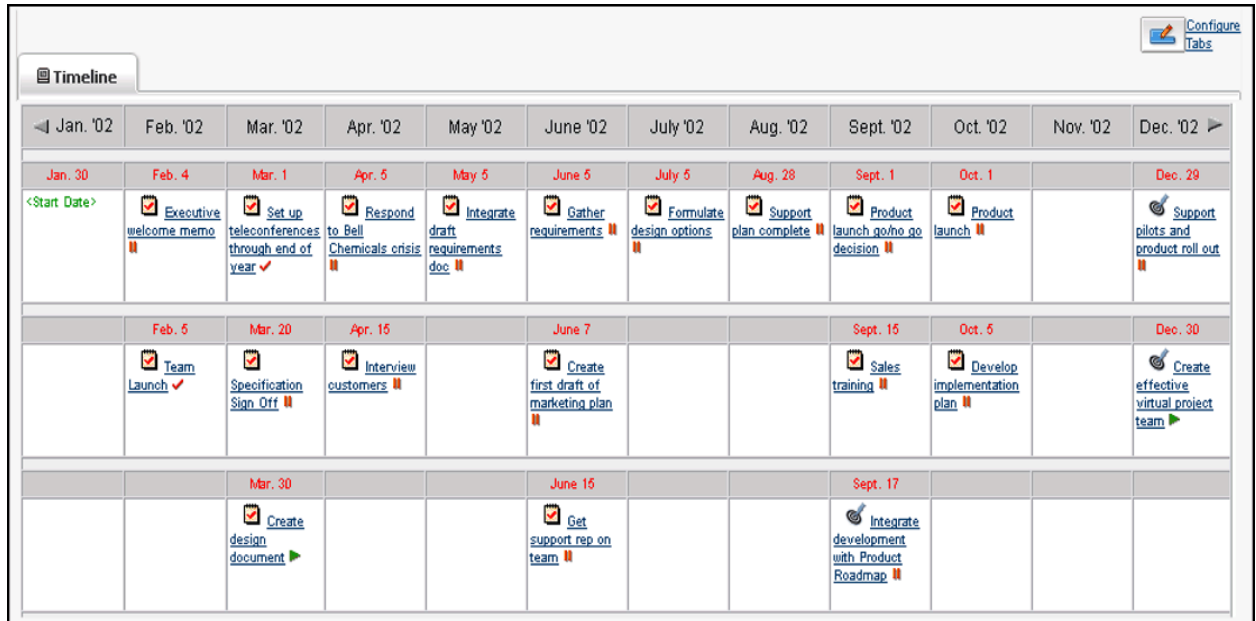
The Time Wall

Time is an essential dimension of human organizations. For all but the simplest of teams, shared management of time and work is critical. Co-located teams can quickly share ideas, correct misunderstandings, and work through problems together on the fly. Virtual teams, however, need to be much more explicit when specifying goals, tracking tasks, and accounting for results. The Time Wall allows virtual teams to store schedules, post calendars, display Gantt charts, and chart progress.

The Timeline Tool

The built-in Timeline Tool allows a team to highlight particular goals and tasks as key events and milestones for tracking its progress. The team embeds this detail in the larger context of an overall timeline. The Timeline enables users to:

- Keep the team focused on results during its launch.
- Rough out phases and pace activity, track progress, and celebrate accomplishments.
- Anticipate potentially disruptive team dynamics in the context of predictable turbulent times.



The Meetings Wall

One of the most important uses of the Virtual Team Room is as a meeting place. It can combine the information display and capture capabilities delivered by an asynchronous medium with the real-time meeting capabilities provided by a conference call or a Web-based tool such as **Livelink MeetingZone** to deliver improved levels of team performance.

Virtual meetings often can prove more effective than face-to-face meetings because:

- Time limits encourage well-organized, well-run meetings.
- The need for shared visuals in virtual meetings causes meeting owners to explicitly document meetings with agendas, minutes, action items, and decisions.
- Lack of face-to-face body language encourages meeting chairs to poll frequently for clear communication.
- The inability to engage in *hall talk* encourages teams to spend time specifically building relationships with members.

For online sessions, the team gathers at the Meeting Wall where you post the agenda, background documents, and minutes. People can then return to the Meeting Wall to review past meeting results and information about future meetings. The Meeting Wall also houses the team's online (threaded, asynchronous) discussions.

Meetings

The Meeting Tab accesses a Tool for creating, communicating, and capturing information for all team meetings. The Livelink Meeting Module allows users to create Meeting *objects*, which are containers for a series of meeting sessions and their associated information. These sessions deliver information prior to a meeting, can be updated during the meeting, and become part of the team's knowledge base once the meeting is over. This enables teams to:

- Post agendas, indicate participants, and post documents.
- Update goals, add tasks, and share documents.
- Make meeting notes available.
- Track action items as tasks.
- Create a searchable history of meeting interactions and decisions.

The screenshot displays the Livelink Meeting Wall interface. At the top, there are tabs for 'Meetings' and 'Discussions'. A notification banner states: 'The last meeting [Weekly 25 May](#) held on Tuesday, May 25, 2004 3:30:00 PM is incomplete.' Below this, there are three main sections:

- Meetings (Listing 2 of 2 meetings):** A table with columns for Type, Name, Status, and Start Date.

Type	Name	Status	Start Date
	Weekly 25 May	Incomplete	Tuesday, May 25, 2004 3:30:00 PM
	Weekly 25 Mar	Unscheduled	Thursday, March 25, 2004 3:28:00 PM
- Workspace:** A table with columns for Type, Name, Size, and Modified.

Type	Name	Size	Modified
	Weekly Task List	0 Tasks	05/25/2004 03:36 PM
- Meeting Templates:** A section for 'MeetingZone Meeting' with an 'Itinerary' table.

Meeting Passcode:	Week
Location:	Oslo
Audio Phone #:	617-334-1267
Audio Passcode:	[None]
Settings	
General Access:	Private
- Membership:** A section for 'Internal Members' and 'External Members' with fields for Name and Department/Organization.

Discussions

Because virtual teams often conduct meetings that take place over time, threaded discussions enable people to create topics and post replies as an organized sequence of messages. This asynchronous meeting mechanism is particularly useful for global teams with limited windows for same-time meetings and is the preferred mode of communication for Communities of Practice.

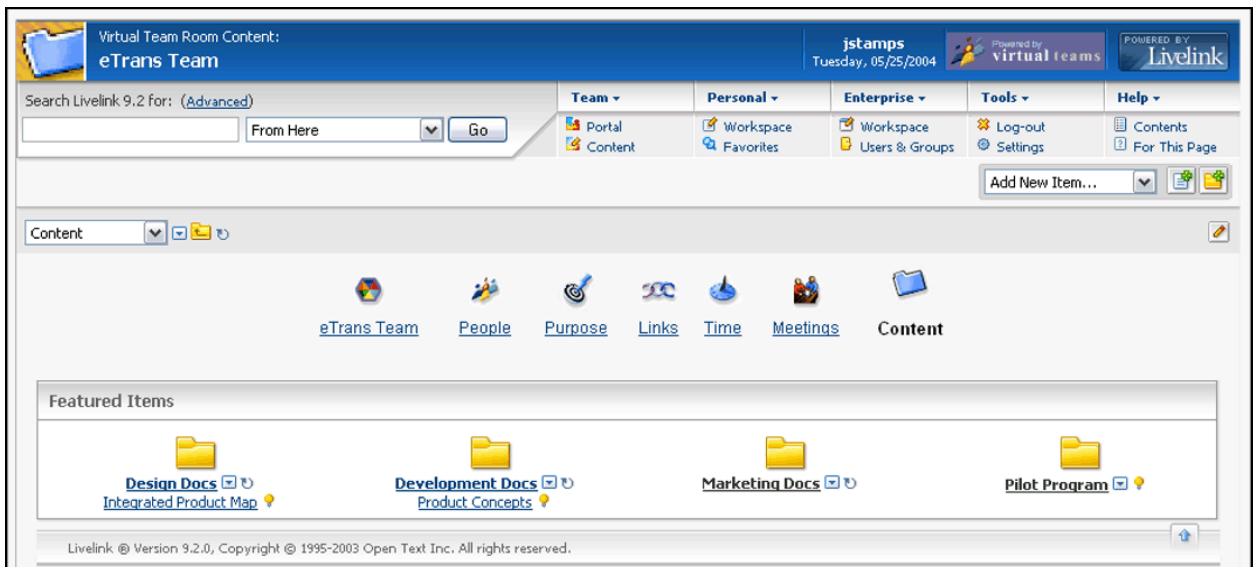
The Discussion Tab collects all the team's asynchronous discussions in one centralized location. In addition to discussions, you can also add items that support discussions through attachments and aliases that link directly to discussion topics and replies.

Livelink eLink™ is an add-on module that enables people to participate in discussions by posting comments and responses via e-mail. The module also provides teams with a log of all team-related e-mail, regardless of the e-mail systems used, by creating a discussion thread that can be copied in all relevant messages.

The Content Wall

Most online teams post their work to folders. The organization of folders is often a mixture of structural and procedural information with content directly related to the work being conducted. With Livelink virtualteams, the team organizes its knowledge base according to the logic of the work so that members, reviewers, and observers know immediately where to go to access the team's unique knowledge.

By using Livelink aliases, you can reference documents displayed in the hierarchy on the Content Wall throughout the team room by process objects such as Goals, Tasks, Discussions, and News Items. You can catalog items on the Content Wall, which promotes them to the top of the display and separates them from the item list. These items appear in the Portal navigation bar as subheadings to Content, just as Tabs do on the other walls.



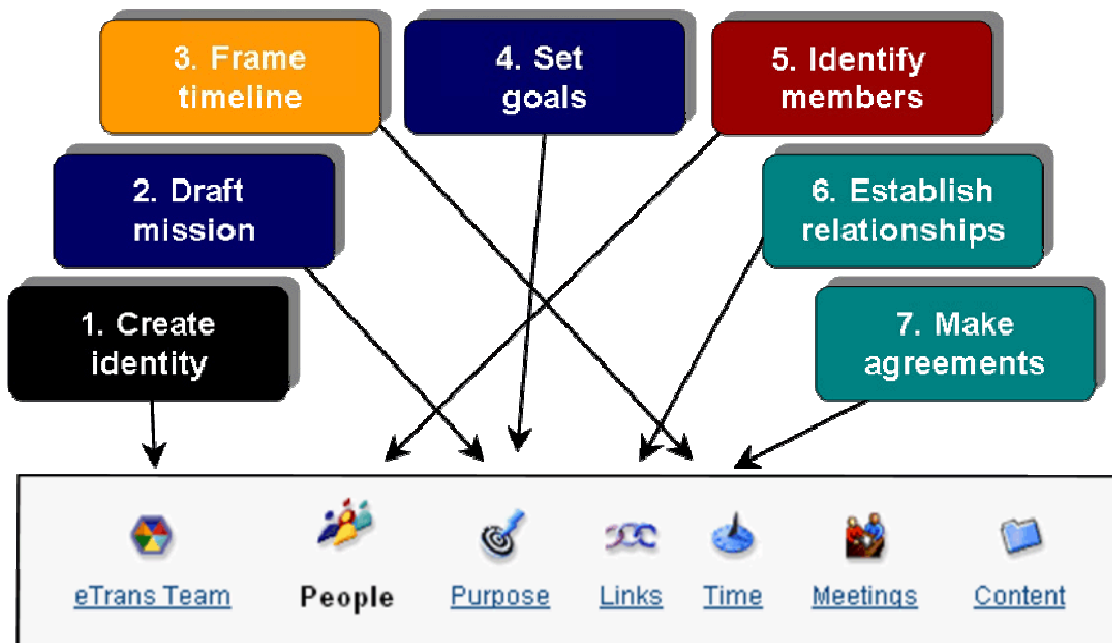
The 7-Step Virtual Team Launch Process™

An obstacle for any newly formed team trying to work together effectively in an online environment is the *blank page* problem. Typically offered an empty folder as a starting place, team members are left wondering, “What now?” Livelink virtualteams presents teams with a room that is already setup for use and equipped with the tools required to support a simple, efficient, and effective team startup.

Seven steps represent the key elements of this process:

4. Create identity
5. Draft mission
6. Frame timeline
7. Set goals
8. Identify members
9. Map relationships
10. Make agreements

While a team may move through these steps in a different order and/or may add additional steps, all teams touch on these elements, whether explicitly or not. When a team fails to perform these steps, they suffer high stress trying to operate virtually and usually witness failure.



When you initialize a new team room, you find the first three steps embedded in the setup procedures: you must supply a team name, a draft (or given) mission and a timeline that includes start and finish dates. These parameters can be adjusted as the team goes through successive iterations of formation.

At the start of the its development process, the team sets up meetings on the Meetings Wall, establishing a schedule for loading the room with preliminary information and hosting launch events.

Using the Mission and Goals Tool on the Purpose Wall, the team establishes a set of high-level Goals. It then uses the Team Members Tool on the People Wall to flesh out the roster by identifying requisite skills and experience through the refinement of the purpose.

As the team begins to build critical mass, it takes a first pass at the Relationship Matrix on the Links Wall. This provides a display of the work, membership, and leadership, which often leads to refinement of the purpose and expansion of the team's network as it identifies new work and roles.

Subgroups naturally indicated by the Relationship Matrix, which takes the work planning down another level by creating tasks and setting up files for results. The Purpose List and Team Task Tools on the Purpose Wall display the evolving plan for all to see. As the phases and major milestones are recognized, particular goals and tasks are tagged to show up on the Timeline Tool on the Time Wall.

As the team comes together, it makes the behaviors required for success explicit by using the Operating Agreements tool on the Links Wall to record team decisions. Among the likely areas of agreement are patterns of regular meetings that can be set up with the Meetings Tool, with default membership, agendas, and other standard information.

As the team proceeds through the development process, its decisions and unique characteristics populate the increasingly rich wall displays of the six-sided room. Regular synchronous meetings in the room help attendees develop a sense of familiarity with those who share the space.

Over time, the team promotes and highlights new information in the room by adding more tabs and changing the default displays. As the team evolves, so does its room.

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