RALLYTEAM

Quick Reference Guide

Welcome to Rallyteam! We've put together some tips to help you simplify your workday and start getting the feedback and recognition you deserve for your great work! First things first: join a few teams.

Teams:

Think of teams as a workgroup, a cross-functional project team, or an interest group (e.g., happy hour or cycling). Communicating with teams in Rallyteam rather than via email creates a permanent, searchable record of all of your work together.

How to get started:
- Click "Teams" in the left navigation bar.
- Find a team that looks interesting to you and click "+Join." You're in!

Your profile:

Now it's your time to shine. Your profile shows off your strengths and the recognition you've received for your work to other Rallyteam users. The more complete your profile is, the more likely you are to be matched to new opportunities. Get out there and swing the bat - you've got this!
- Click on your profile photo in the left navigation bar, then "Edit Profile" to make changes to your profile after initial setup.

- Select or update your photo by clicking on "Upload New Image." Don't be shy - people want to see your face!
- Specify your top 5 skills in My Top Skills and the rest in Other Skills. List any industries in which you have particular expertise. List skills you'd like to develop or areas of interest in Interests. These will be visible to all members of the community and used to match you to opportunities within the system.
- Looking for a shortcut? On the Edit Profile screen, select "Profile Builder" to upload your resume or import basic information from your LinkedIn profile.

My Workspace:

You can find all of your projects and tasks on this page.

Tasks:

Think of tasks as not full-blown projects, but quick, one-time "to do" items. Use your task list to stay organized throughout your workday.

Projects:

Think of projects when you or someone else needs help with something. When you create a project, Rallyteam will help you find the people with the right skills and interests to help. You also can view, filter and sort projects on the Marketplace screen to find projects you may wish to join.

Creating a project:
- On any page, click on "Create" in the top navigation bar and select "Project."
- Summarize the type of help you need, and include a description of your project.

- Specify the skills needed for your project (Rallyteam will suggest some based on your description and find the users that are the best match).
- Specify any award ("bounty") you're offering for help.
- Specify a team.
- Review matched users on the right side of the screen and decide whether or not to notify them of your project.
- Click "Make It!"
- Click "Share" to share your project with specific users not already notified.

Joining a project:

You'll find projects posted by other users on the RallyNow screen. Rallyteam will also suggest projects for you based on your skills and interests. To join a project, click "+Join Project.". The project owner will be notified of your interest and approve or reject your request to join.

Working with projects:

Once you or the project owner has formed a project team, the status should be updated to "In Progress." Communicate with your project team on the project page. Use @username and @all to notify the appropriate users. Share files with your project team by uploading them from a computer or sharing from Box, Dropbox, OneDrive or Google Drive.

Completing projects:

When the project is completed, the project owner should click "Mark Complete" to begin the close-out process. This process allows the project owner to record key data such as:
- Cost savings achieve by leveraging internal resources instead of outsourcing.
- Hours saved via optimized productivity.
- Skills gained or demonstrated by team members.

Communicating in teams and projects:

Use @all and @username to ensure that team or project members are notified of your comment or question. @all will notify all team members, and @username will notify just one. Share files with your team by uploading them from a computer or sharing from Box, Dropbox, OneDrive or Google Drive.

Tips for making the most of Rallyteam:

- Make a point of using Rallyteam to communicate with your team as often as possible.
- Reply to email notifications directly from your email client. Your response will be posted to the appropriate team or project in Rallyteam.
- Create projects via email by entering your project abstract as the subject line and the description in your email body. Send to <your company portal name>@rallynow.me.
- Use Search to find users, projects and teams. You may also filter results by type.