TeamDynamix

MANAGER TRAINING SUPPLEMENT

8/30/2018 TeamDynamix Application Training

Manager Training Supplement

TEAMDYNAMIX APPLICATION TRAINING

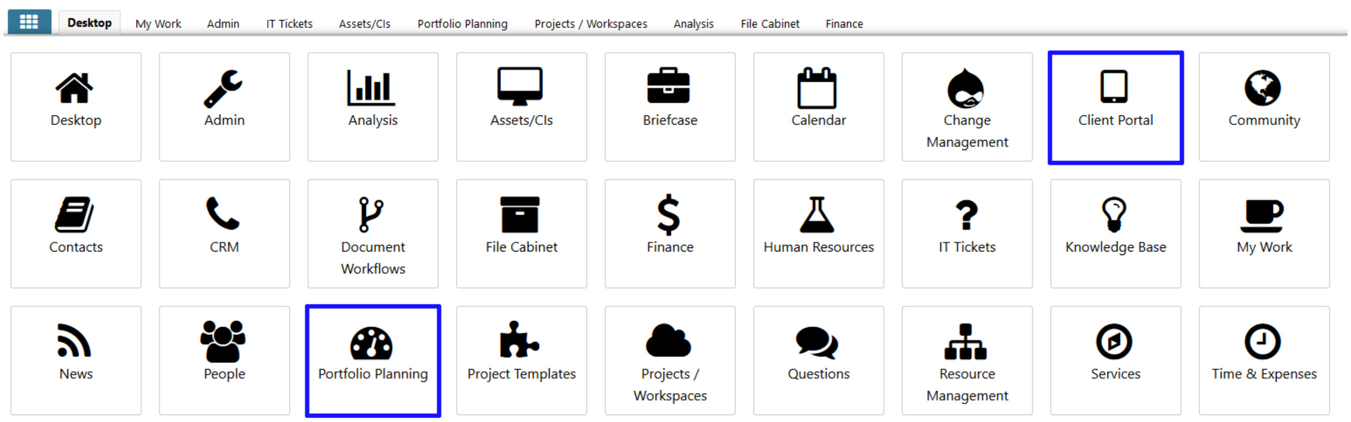
OVERVIEW

The following document summarizes some of the more common activities performed by management within the TeamDynamix application. This training guide is meant to be a supplement to the on-site training provided by the TeamDynamix implementation consultant and other resources available within the TeamDynamix Knowledge Base located at https://solutions.teamdynamix.com.

CREATING PROJECT REQUESTS

There is a distinction between a project request and a project in TeamDynamix. Project requests are potential projects that are being evaluated and will eventually (if approved) graduate into a project. Projects, on the other hand, are active efforts that are created once a request has been approved or created directly for situations when the project work does not need to go through the approval process. Whether you create a project request or a project initially likely depends on business processes that have been established within your organization or institution.

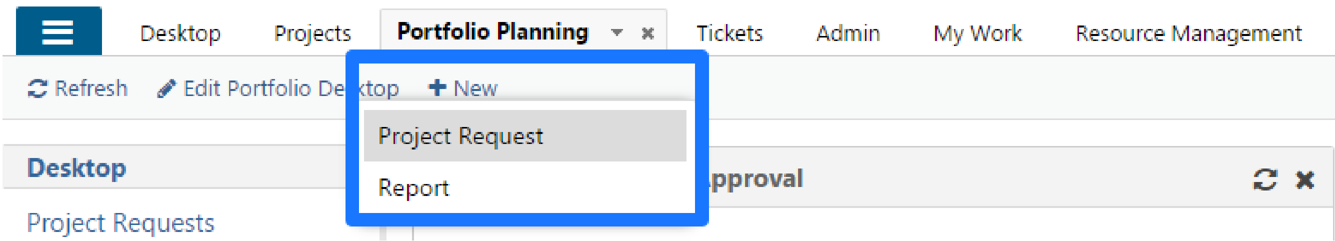
A project request can be created either via the Service Catalog in the Client Portal or from the Portfolio Planning application.



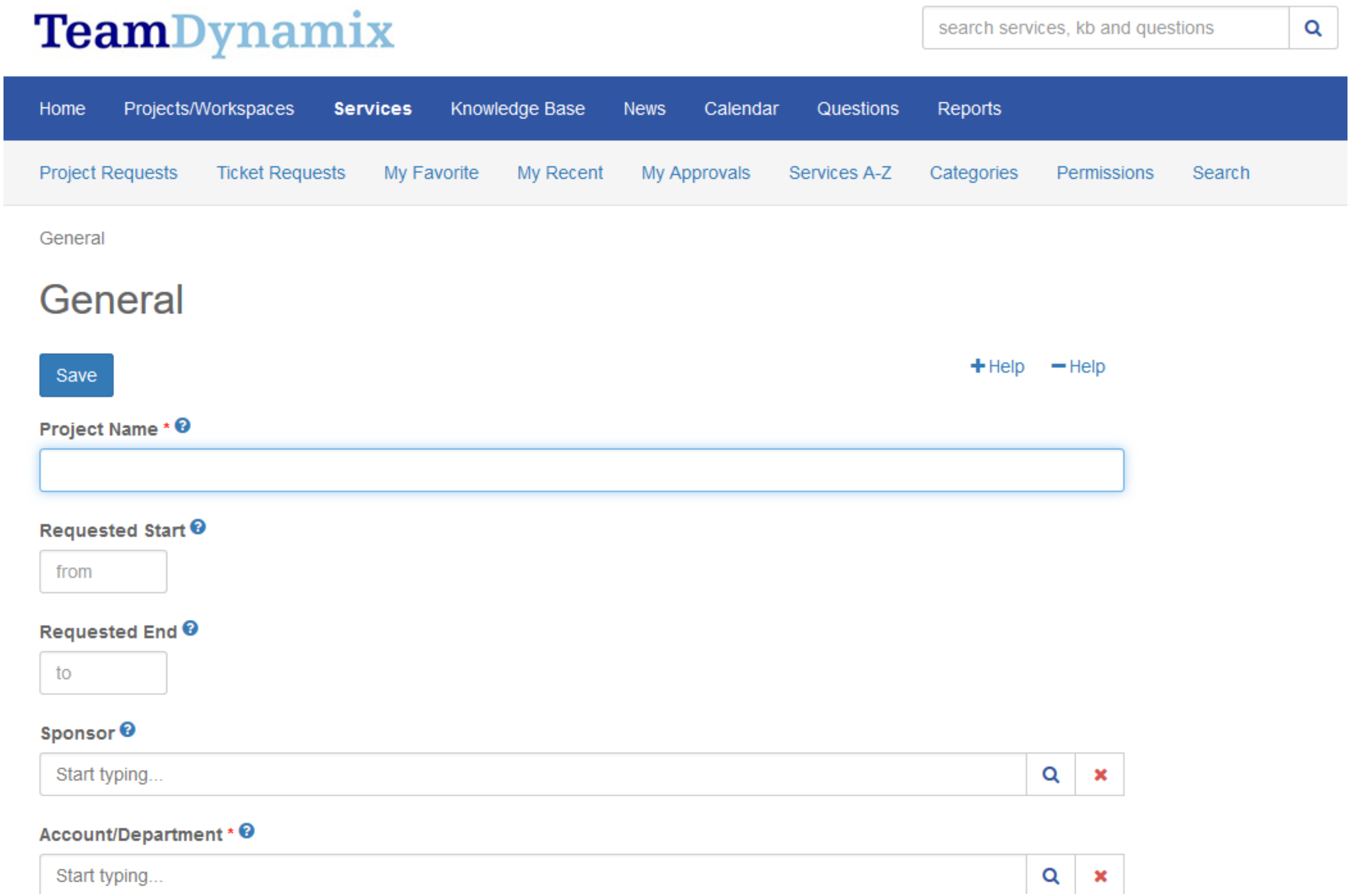
Generally speaking, your customers will submit project requests via the Client Portal whereas internal, licensed TeamDynamix users may leverage the Portfolio Planning application. It may be wise to direct all project requests (even departmental/internally-related requests) through the Client Portal so that the appropriate data fields are captured and workflow processes are followed. Once a project request is submitted, it is within the Portfolio Planning application that project requests will be managed throughout the evaluation process.

Use the following steps to create a new project request for evaluation from within the Portfolio Planning application:

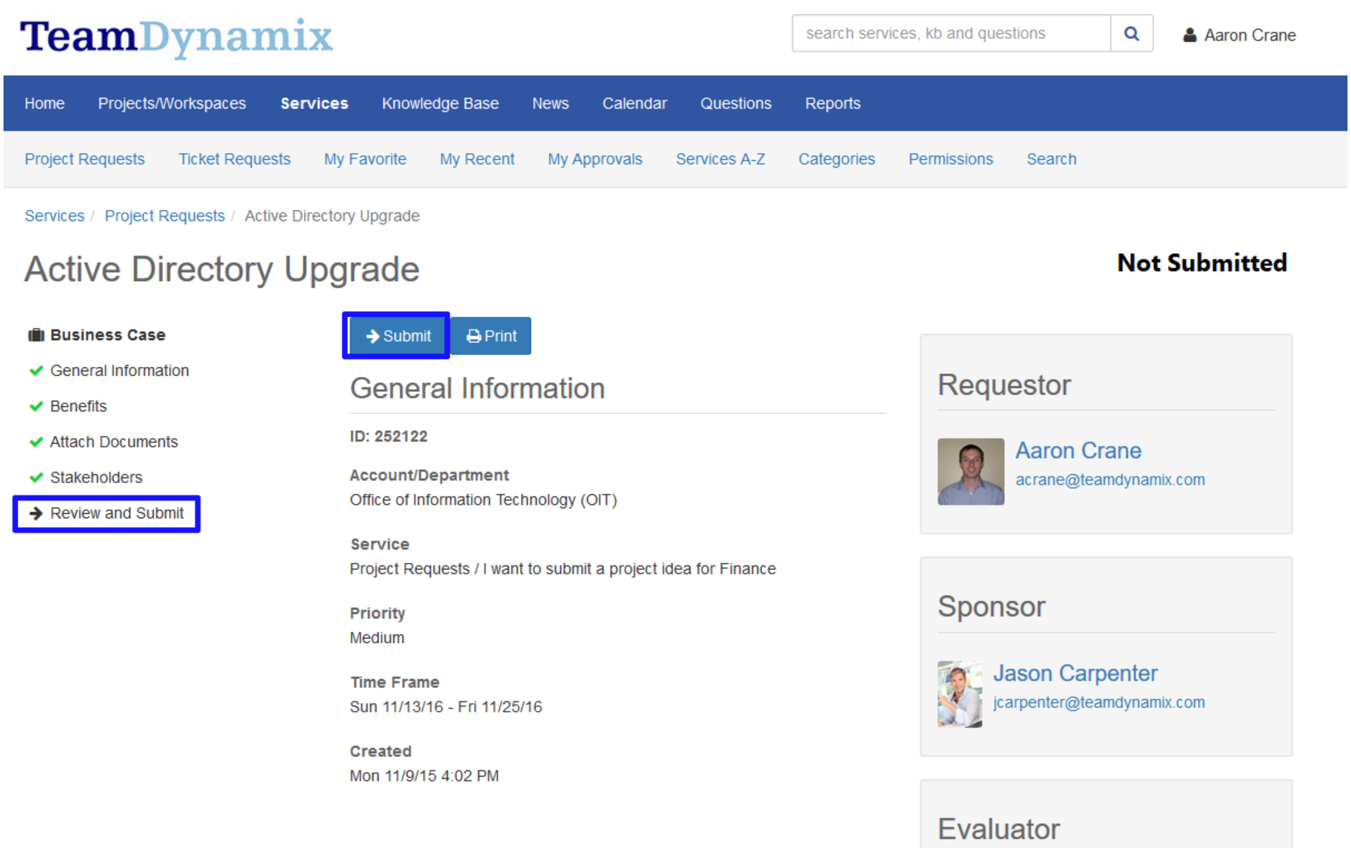
1. A new project request can be created within Portfolio Planning by clicking the "New Project Request" button. This will provide a General Business Case form (located within the TeamDynamix Client Portal) that can be completed to begin a project request.



2. The General section must be completed. Once saved, you can navigate to other sections of the business case that have been enabled. You can simply save the business case by clicking the "Save" button. If you are finished, you identify the section as complete, by clicking “Mark Complete”. **All sections will need to be marked complete before the business case can be submitted.**

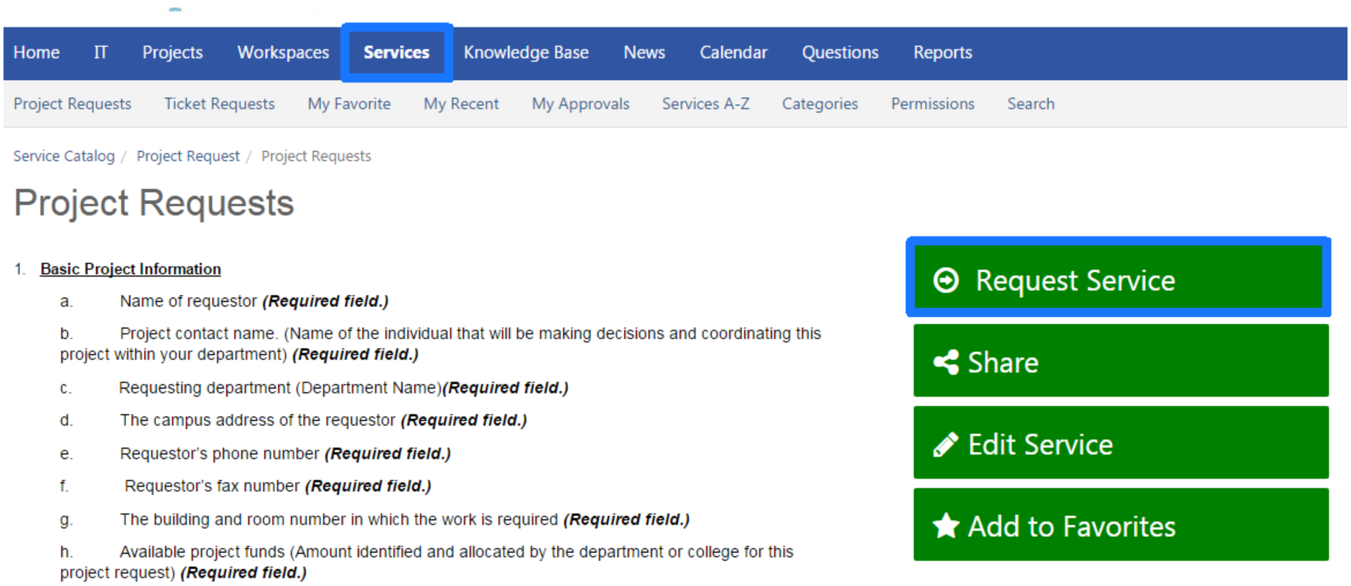


3. Once all sections have been completed (as indicated by having all green check marks), the project request can be submitted for review.

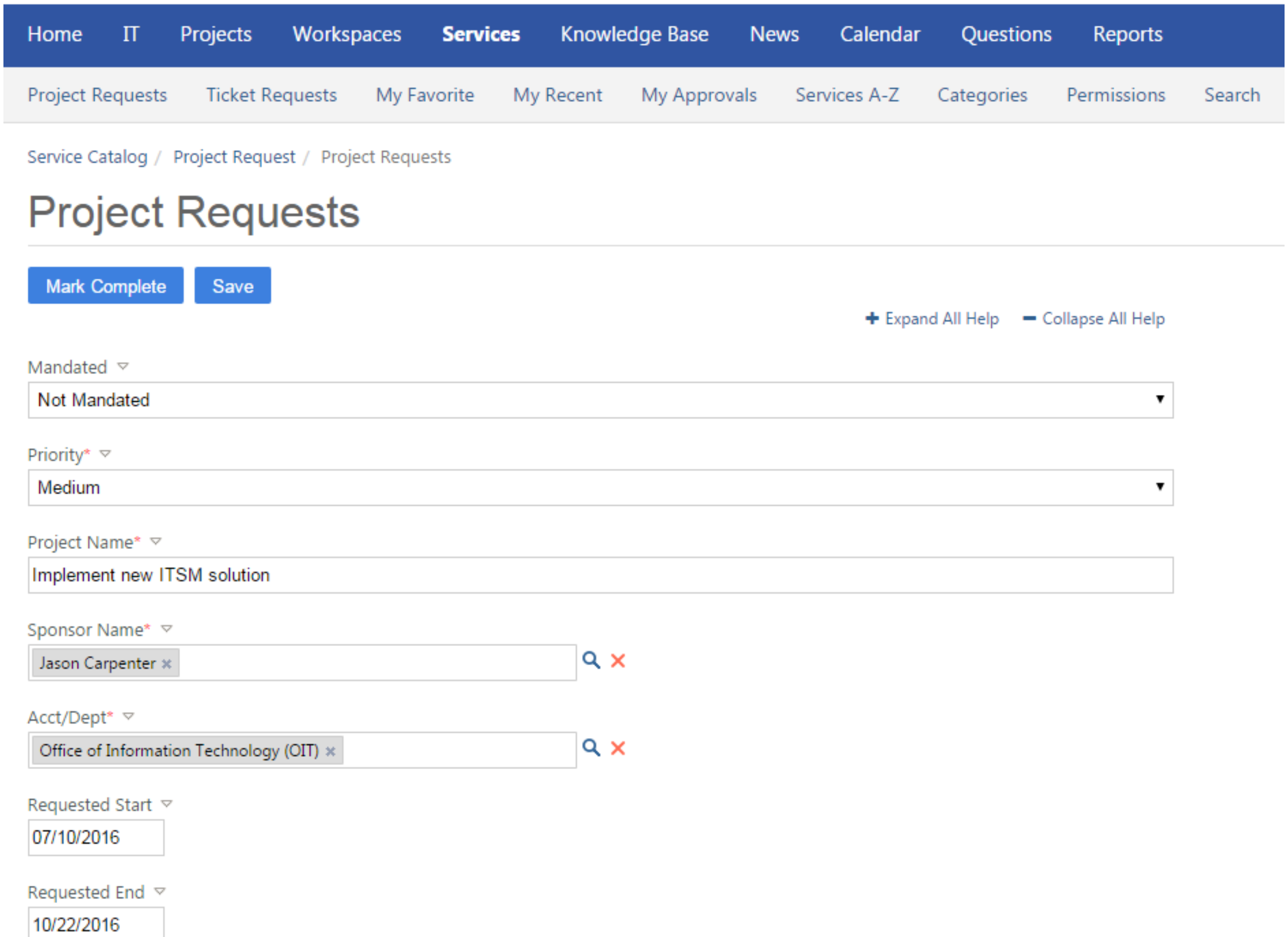


Use the following steps to create a new project request for evaluation from within the Client Portal:

1. Navigate to the Client Portal by selecting the application from the menu. This icon will direct you to the Client Portal which is a separate web site. Alternatively, you can navigate directly to the Client Portal by going to https://[yourorganization].teamdynamix.com and selecting Sign-In > Client Portal. Once in the Client Portal, a project request can be initiated by selecting a service within the catalog that is configured to create a project request.



2. The initial form displayed must be filled out and then either saved or "marked complete". It is then that other sections of the request are made available, depending on how TeamDynamix is configured. **All sections will need to be marked complete before the business case can be submitted.**


Home
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Projects
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Reports
Project Requests
Ticket Requests
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Acct/Dept*
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Requested Start
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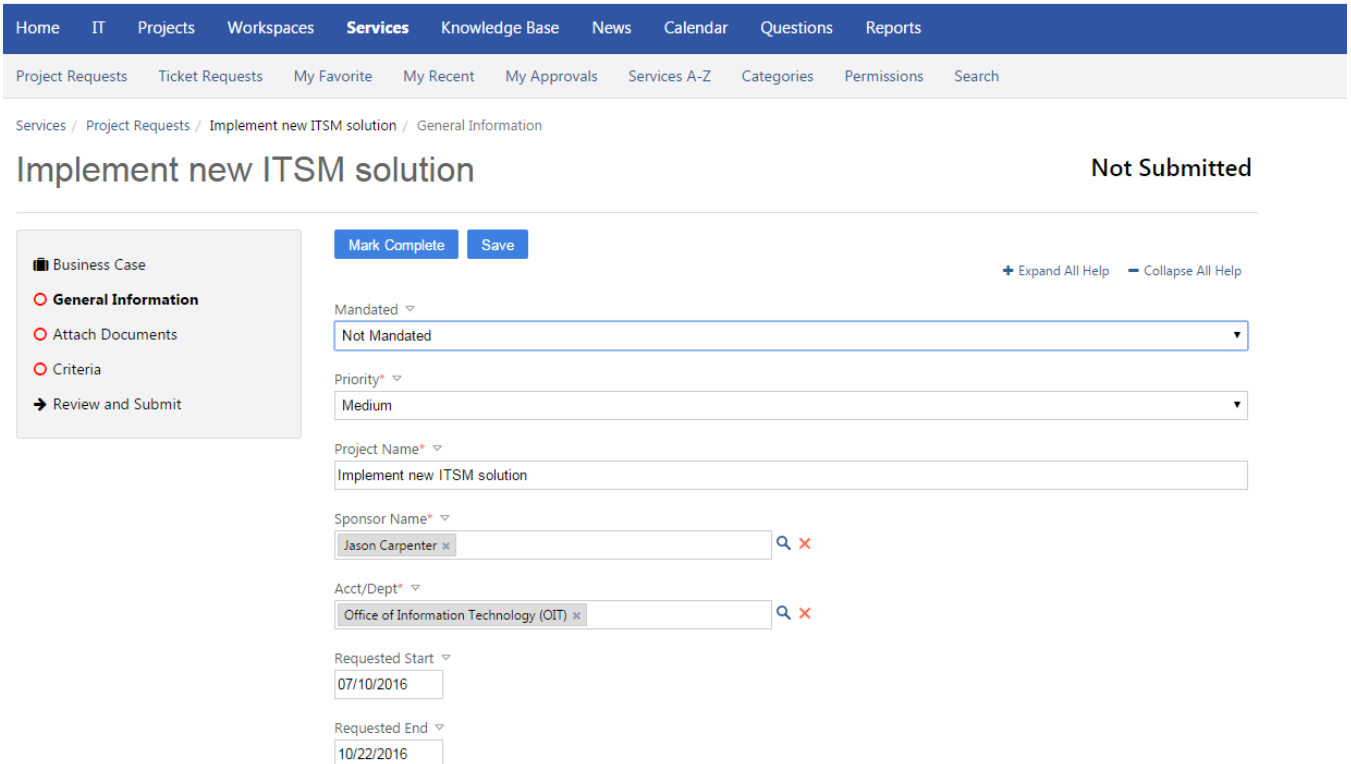
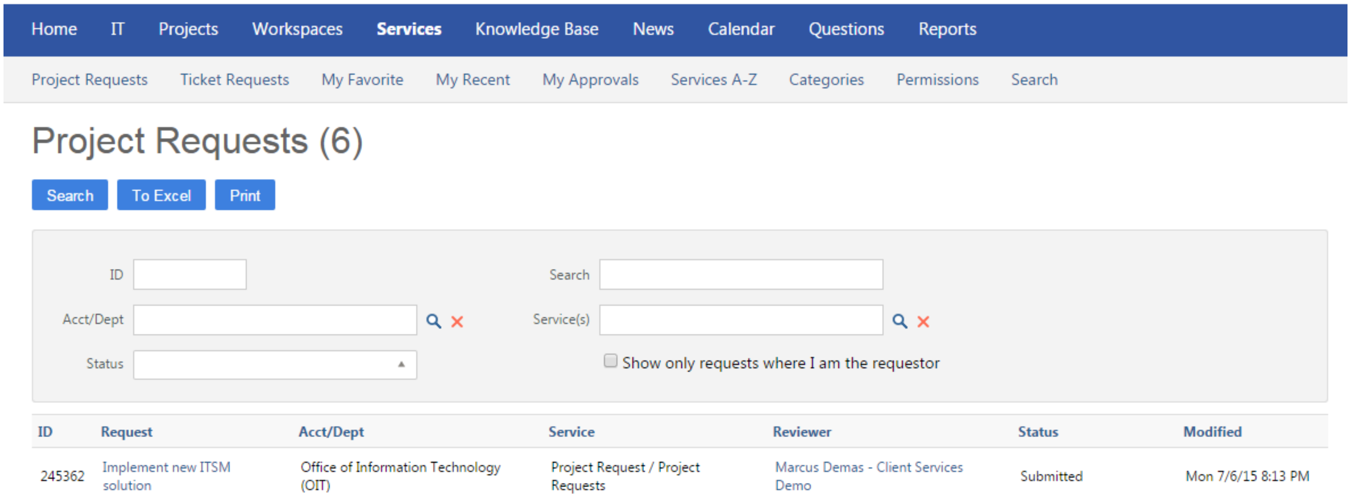
Requested End
10/22/2016



3. Following the submission of the request, its status can be tracked in the Client Portal via the Services > Project Request link. **It is important to note that the project request will only remain in this view while the request is being evaluated. Assuming the request is approved and converted to a project, the request will no longer appear in this area. It will then appear under the main "Projects" menu. Please note, however, depending on visibility settings or project membership, the project may not be visible to all users.**


Home
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Projects
Workspaces
Services
Knowledge Base
News
Calendar
Questions
Reports
Project Requests
Ticket Requests
My Favorite
My Recent
My Approvals
Services A-Z
Categories
Permissions
Search
Project Requests (6)
Search
To Excel
Print
ID
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Show only requests where I am the requestor
ID
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Reviewer
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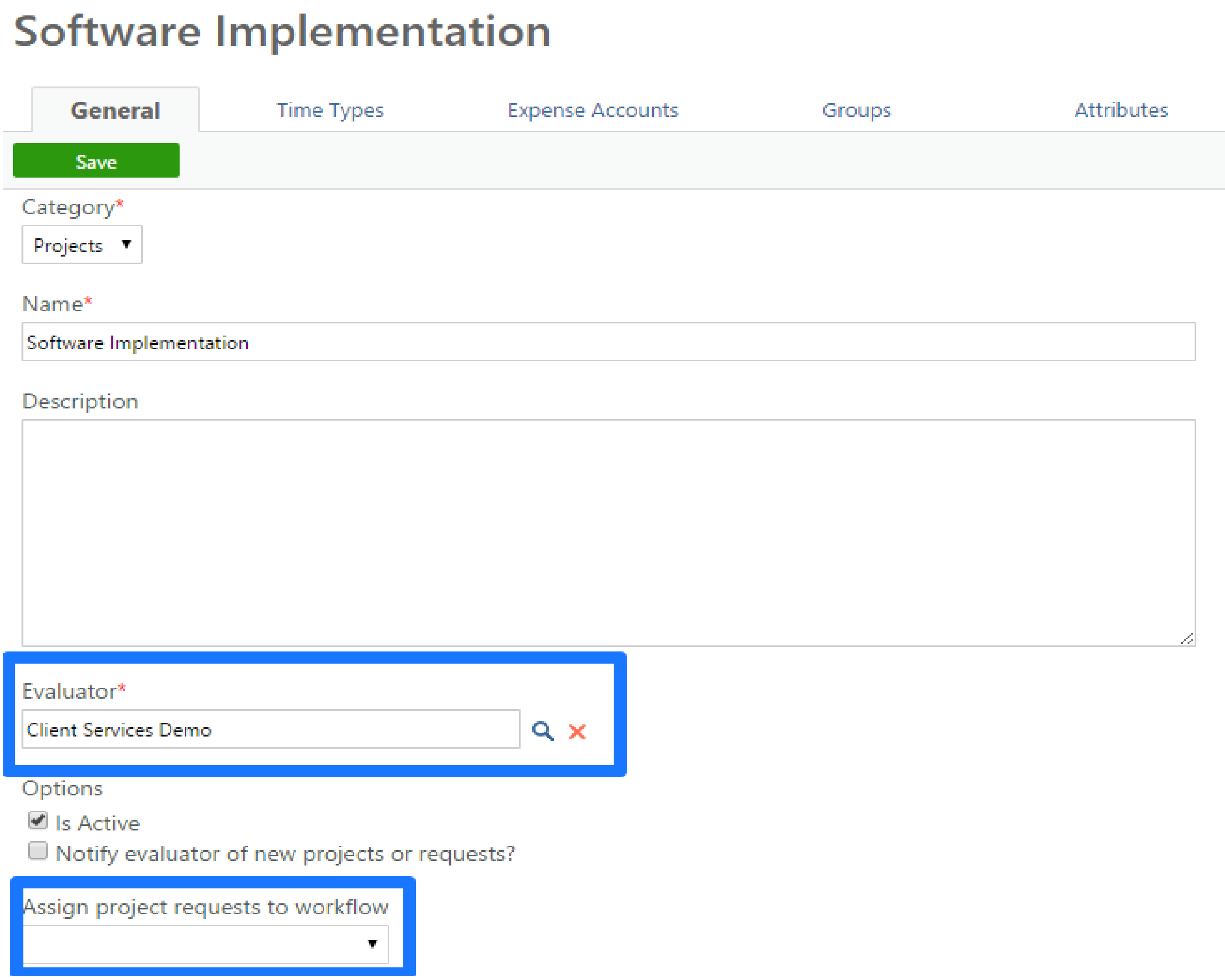
245362
Implement new ITSM solution
Office of Information Technology (OIT)
Project Request / Project Requests
Marcus Demas - Client Services Demo
Submitted
Mon 7/6/15 8:13 PM

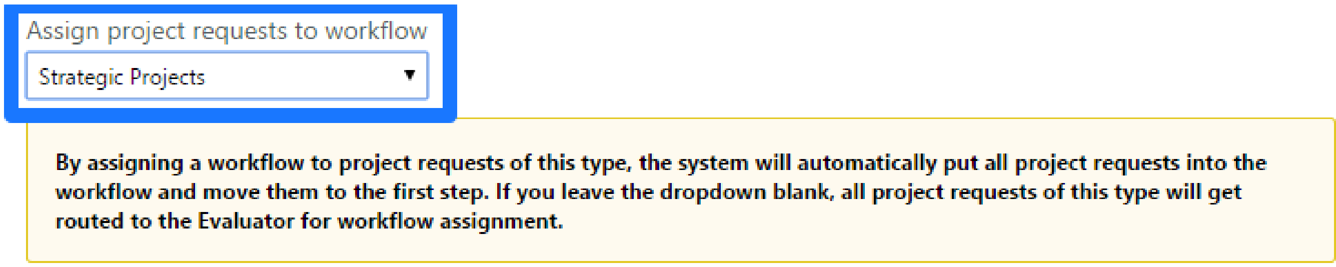
REVIEWING A PROJECT REQUEST

Once a project request has been submitted, there are two possible paths it may take towards being reviewed. The request will either go to an Evaluator, who must review the request and then select a workflow for the request to follow. Or, the request will bypass the Evaluator and enter directly into a workflow process. The route that the project request follows is determined by the project type and configured in TDAdmin.

The following example shows a project type configured to go to an evaluator.



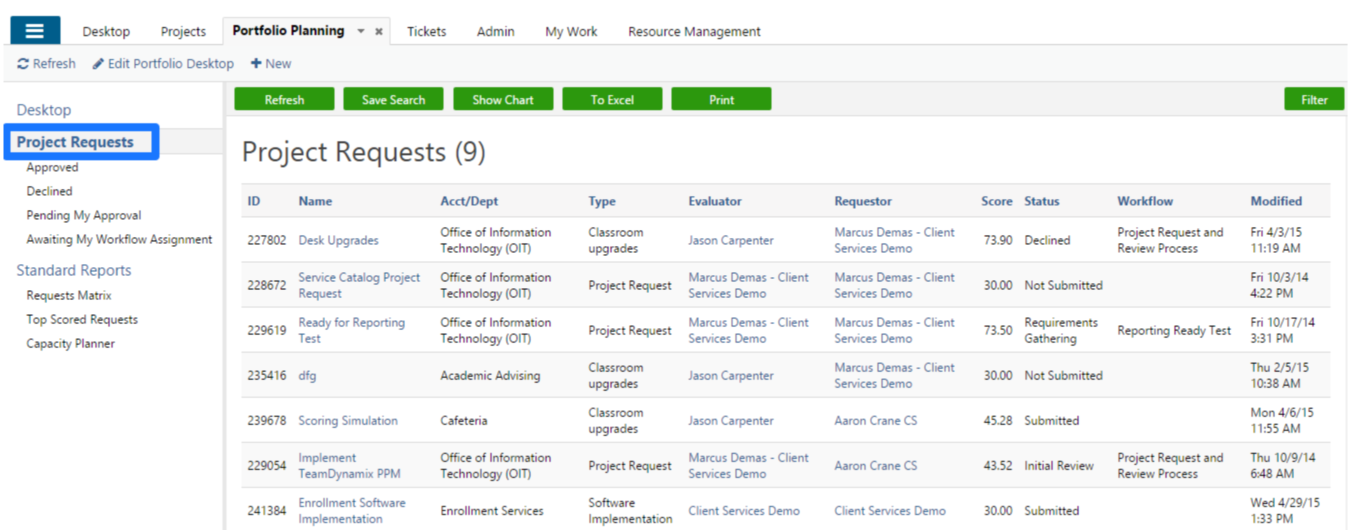
By contrast, if a project has a workflow specified, it will bypass the evaluator and enter directly into a workflow for review.



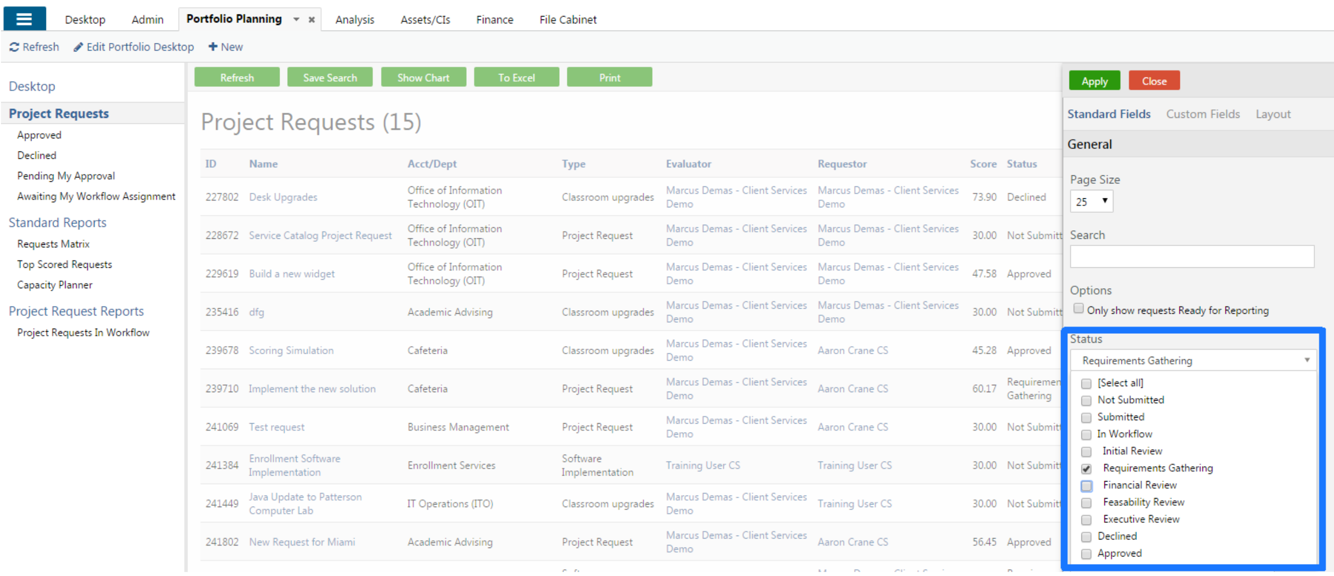
Evaluating Project Requests

If you are responsible for **evaluating** a project request, you will receive an email notification with a link. Clicking the TDNext link within the email message will take you to the project request within Portfolio Planning. Additionally, it should be noted that you can always find project requests of which you are responsible for reviewing by going the Application Menu → Portfolio Planning → Awaiting My Workflow Assignment.

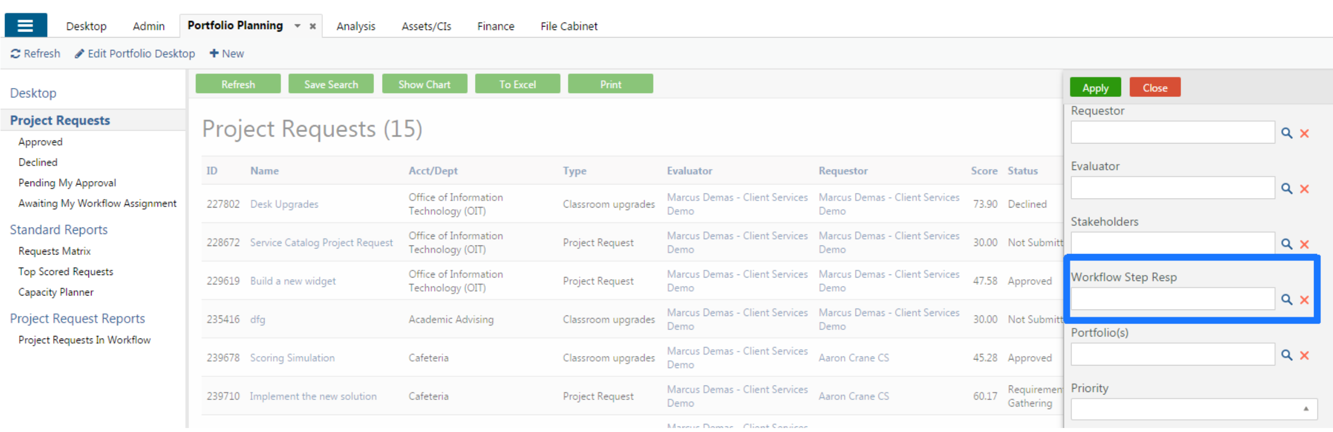
Many applications within TeamDynamix use a search layout similar to the one found in Portfolio Planning. The views found within the left-hand frame beneath "Project Requests" are standard searches (e.g. Approved, Pending My Approval). ***If for some reason you cannot find a project request, click on the parent "Project Requests" link to view all requests.*** Additionally, you can configure the search screen with specific values and then click "Save Search" to create a custom search. It will also appear as a child within the "Project Requests" parent link.



Use the "Filter" button on the right-hand side of the screen to find specific requests. For example, two common searches might be to find requests in a particular stage of the workflow. The "status" field would be used for this type of search.

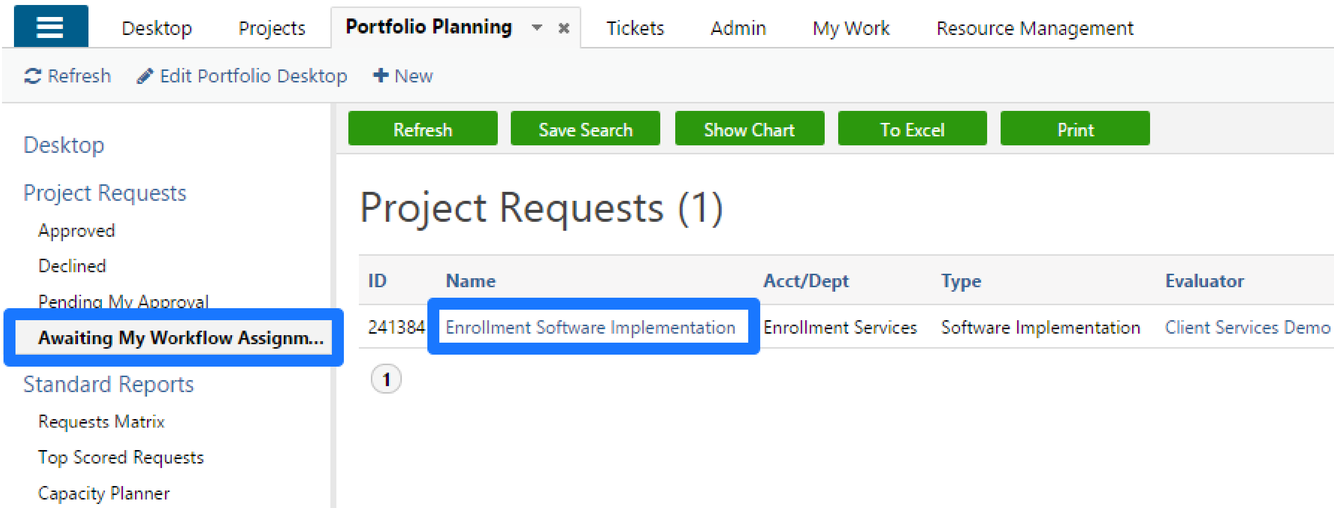


Alternatively, it might be necessary to find all requests where your user account is responsible for a step in the workflow. This could be accomplished by clicking on the "Pending My Approval" link in the left-hand navigation frame or my searching with the "Workflow Step Responsible" field.

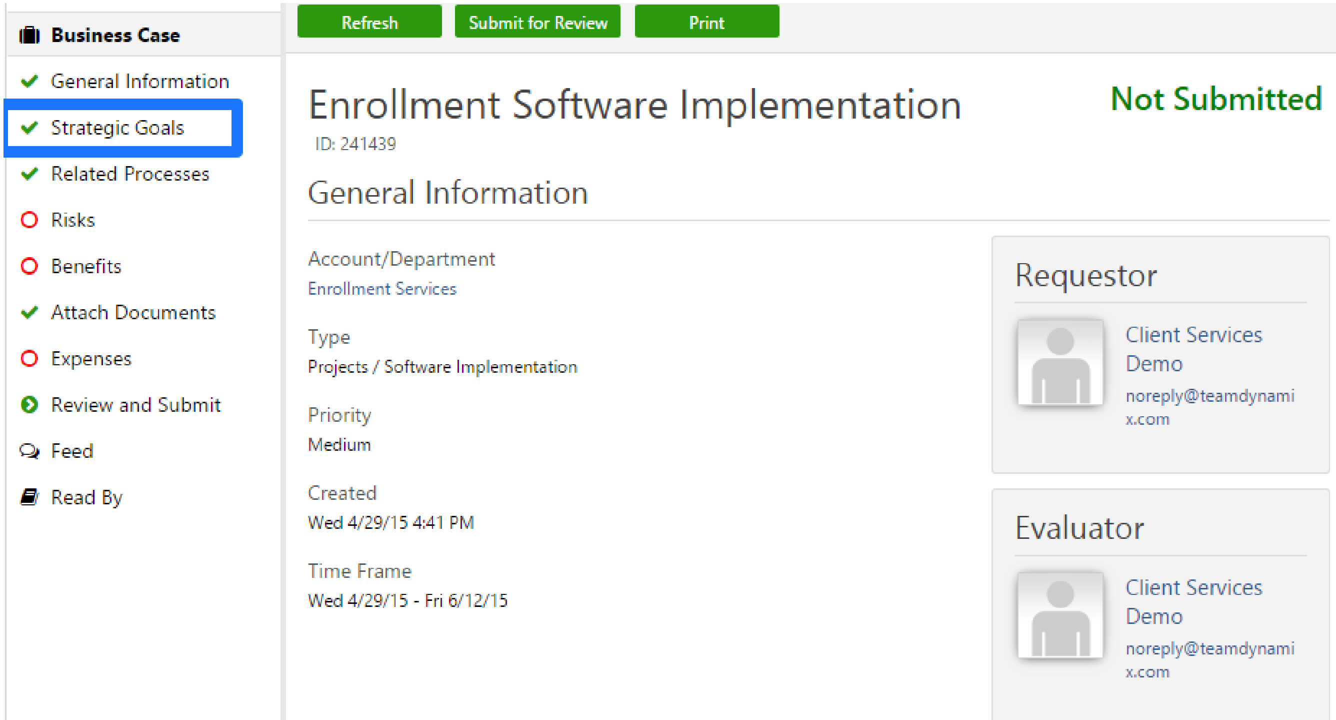


To evaluate a project request and submit it to a workflow for review, follow the steps below:

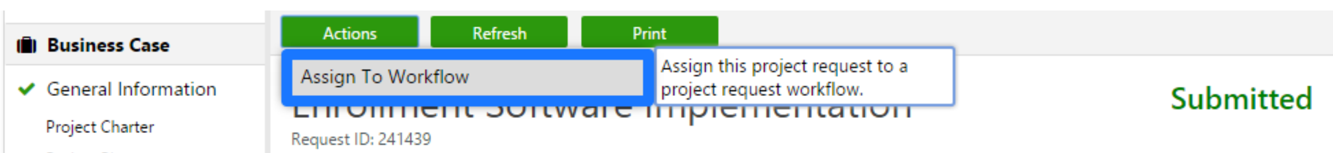
1. Click on Awaiting My Workflow Assignment within Portfolio Planning.
2. Open a project request business case window by clicking on the name of the project request.

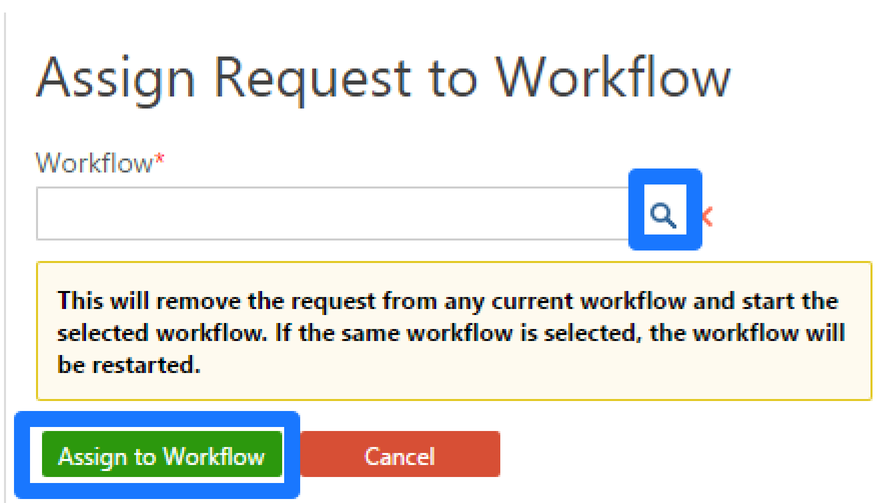


3. Each section on the left-hand side of the business case is available for review. A section does not have to be marked "Complete" in order to submit it to a workflow. However, if the section is edited and does not need further review throughout the entire review process, it can be marked as complete to indicate it has been finalized.



4. Once the evaluation is complete, click the Action button on the Business Case view and select "Assign To Workflow". Select the appropriate workflow for the project request.



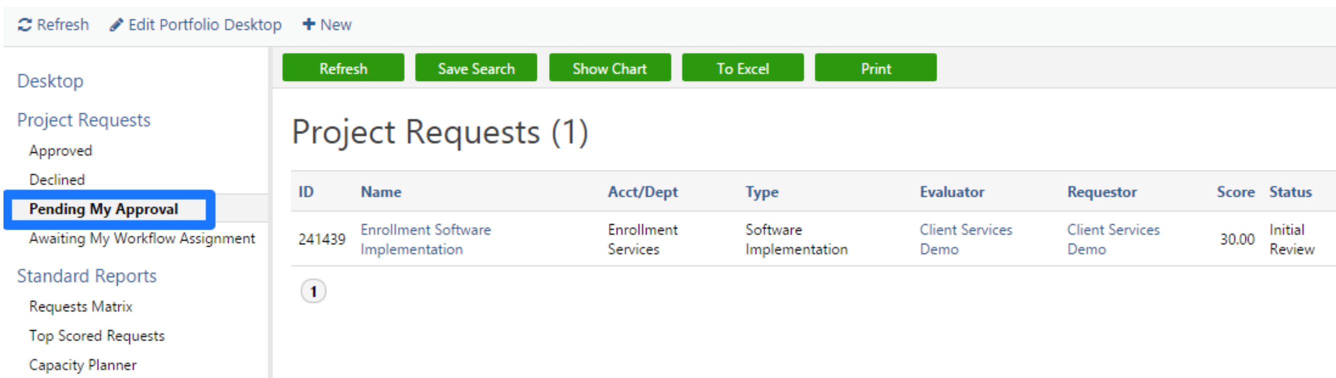


Reviewing a project request within a workflow

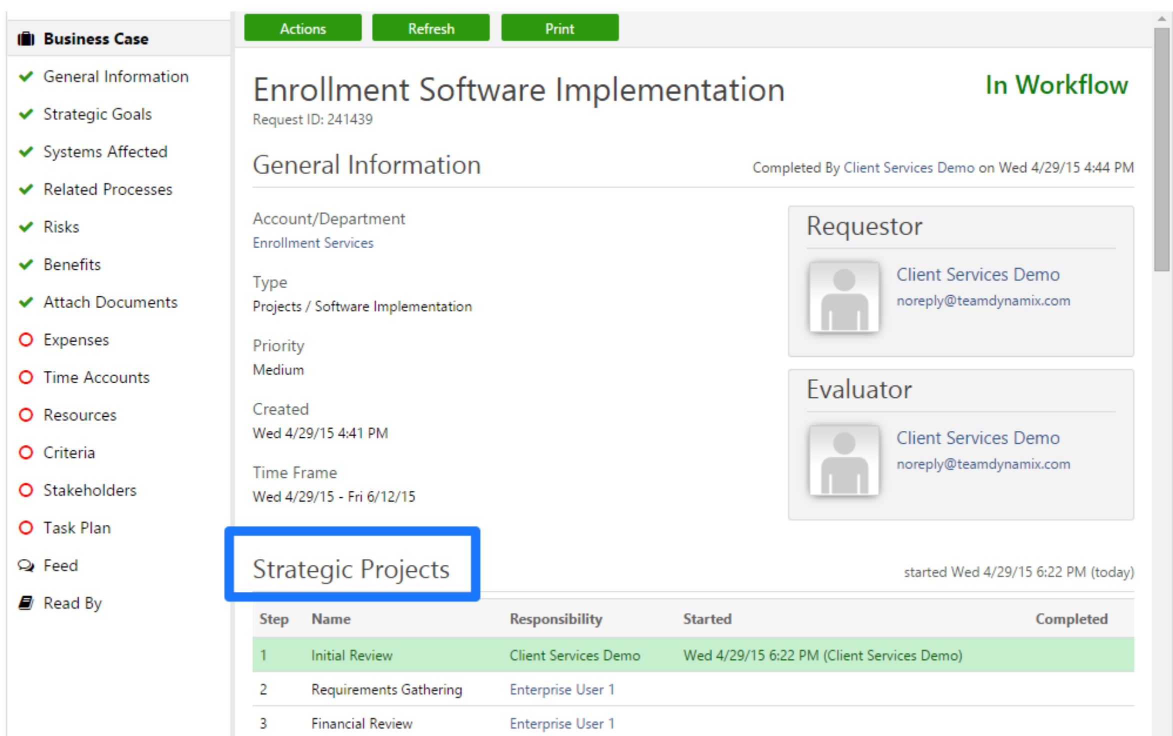
If you are responsible for reviewing a project request within a workflow step, you will receive an email notification with a link. Clicking the TDNext link within the email message will take you to the project request within Portfolio Planning. Additionally, it should be noted that you can always find project requests of which you are responsible for reviewing by going to Application Menu → Portfolio Planning → Pending My Approval.

To evaluate a project request that is in workflow, follow the steps below:

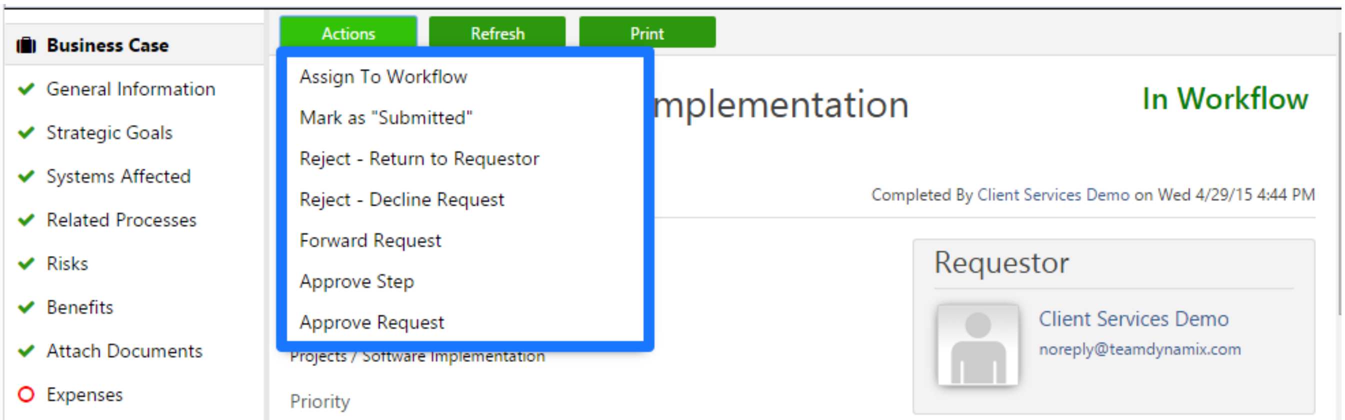
1. Click on Pending My Approval within Portfolio Planning



2. Click on the Project Request name to open the business case window. The business case details view will show which workflow and step the request is in.



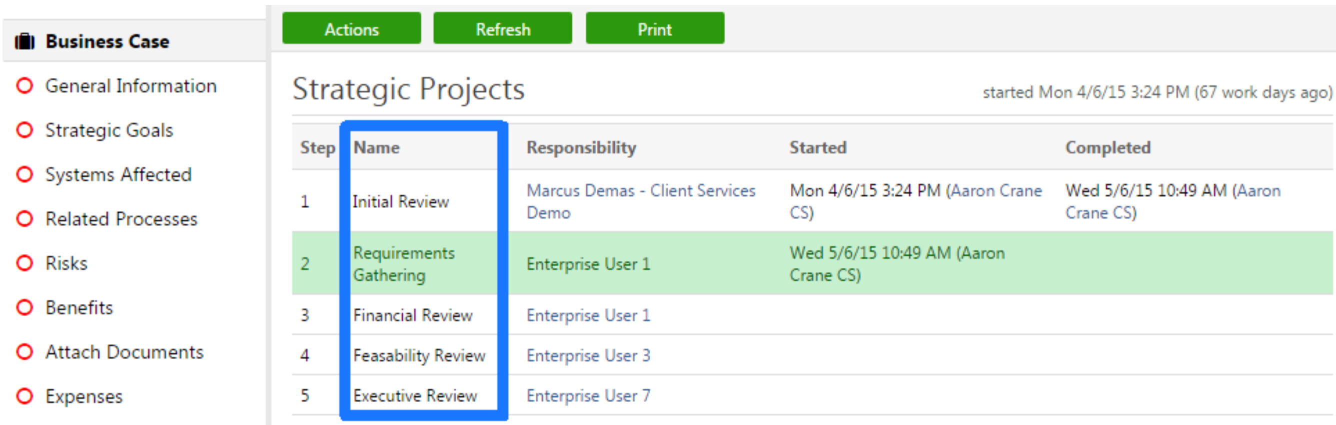
3. Review the sections on the left-hand side of the business case window. You can mark the section as complete if it requires no further review.
4. To move the request through the stages of the workflow process, click the Action button found on the business case view. The items that appear when clicking the Action button are based on the permissions set at the workflow step.



The workflow step actions that can be performed on a request are as follows. Please note, it is important to remember that all actions may not be present depending on permissions and based on how the workflow is configured.

- Assign to Workflow – Assign this request to a project request workflow. A request can be submitted to a new workflow from an existing workflow in the case that it was mis-assigned or now needs to go down a different path.
- Mark as "Submitted" – Return the request to the submitted state. In other words, the request will be as it was immediately after being submitted by the Requestor.
- Reject – Return to Requestor – Return the project request to the Requestor. This will send the project request back to the "Not Submitted" state and notify the Requestor that it needs further revision before it can move through the workflow.
- Reject – Return to Previous Step – Return the project request to the previous step in the workflow. This will send the project request back to the prior step and it will again be pending approval of the resource assigned to that step.
- Reject – Decline Request – This will mark the request as rejected. The Requestor will be notified and the request will be moved to the "Declined" area of the Portfolio Planning application.
- Forward Request – This allows the request to be forwarded to any other Portfolio Planning user. The recipient will receive a notification and the request will be found in that user's Pending My Approval view of the Portfolio Planning application. It is important to note that the project request does not have to wait for the recipient of a forwarded request. The original resource assigned to the step can continue in the workflow process.
- Approve Step – This approves the current step in the project request workflow and moves the request to the next step in the process.
- Approve Request – This approves the project request outright. The Requestor will receive a notification that the request has been approved and the request will be moved to the Approved section of the Portfolio Planning application. It is important to note that it is still a project request at this point and is ready to be staffed, which will convert the request to a project.

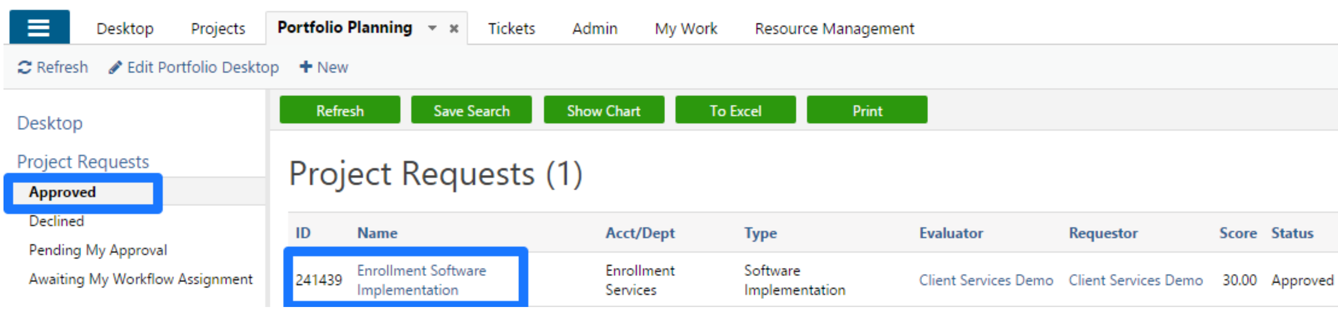
As a request moves through the workflow, its status and placement in the workflow will be highlighted as seen in the example below:



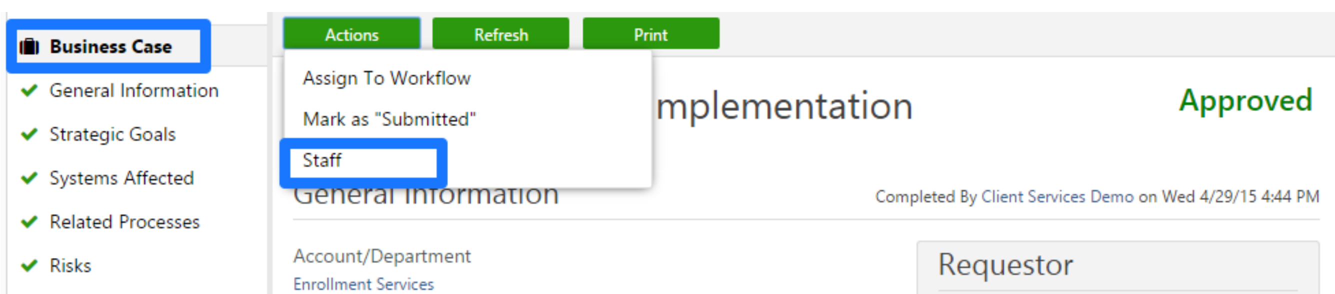
CONVERTING PROJECT REQUESTS TO PROJECTS

Once a project request has been approved, you will find it in the "Approved" view within Portfolio Planning. It is still a project request at this point and the next step is to convert it to a project. The process of converting a project request to a project happens when the project is "staffed." Essentially, you are looking for the availability of resources, determining the start and end of the project and assigning those resources to the functional roles that were added during the request process. To staff a project request and convert it to a project, follow the steps below:

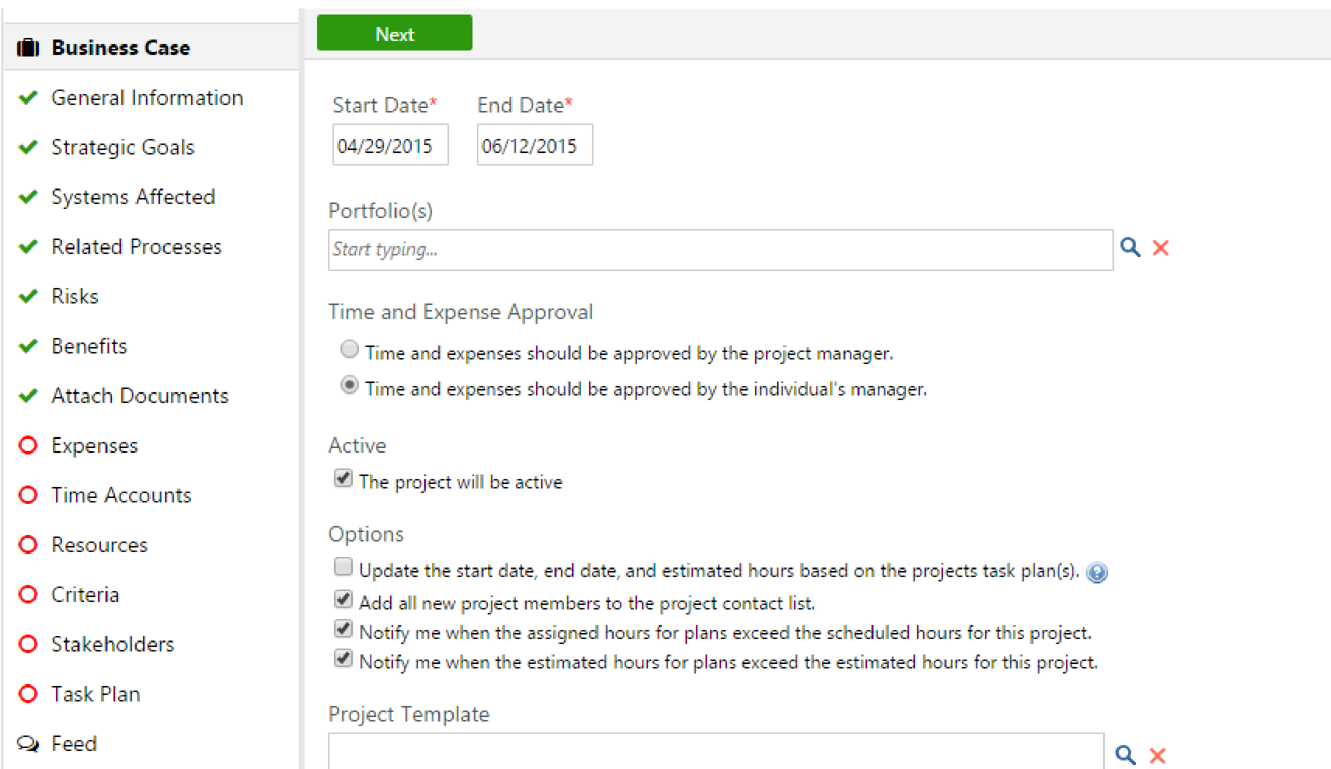
1. From Portfolio Planning, click on "Approved" to view all project requests that are ready for conversion to a project. This will show a list of all approved project requests that have gone through a workflow process.



2. Click on the name of a project request and then click on the business case view. You will begin the staffing process by clicking the Action button and selecting "Staff".

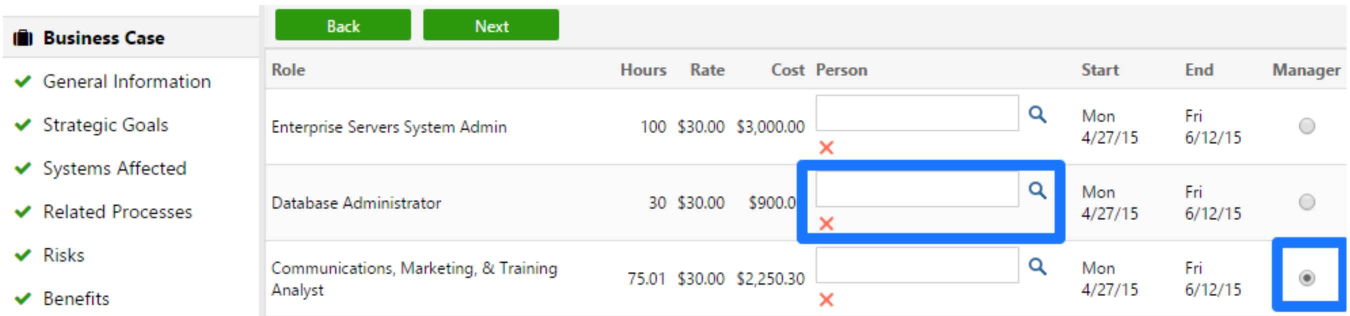


3. During the staffing process, you will have the option to set key parameters of the project:
    a. Project Start and End Date - By default this will be the start and end date that was set on the project request. You can adjust this date range as necessary. Note: This date range will be the range from which your resources availability will be viewed.
    b. Portfolios - If this project should be added to any Portfolios, you can do so from here.
    c. Time & Expense Approval - Time and expenses submitted against a project can follow two paths for approval. First, it can be approved by the manager of the project. Alternatively, it can be approved by the user specified as the "Reports To" user within a resource's profile. This value is set within the "Users" section of TDAdmin.
    d. Options - There are additional options about updating the start and end dates, adding members to contact lists and notification options. These are covered in more detail in the Project Administration section.
    e. Template - You can specify a project template during the conversion process to a project. **It is important to note that you can also apply a template after the project has been created by selecting the Actions menu from the Project Details view.** Templates allow you to include a starter project plan (task schedule), set of issue categories, briefcase structure with documents and more.

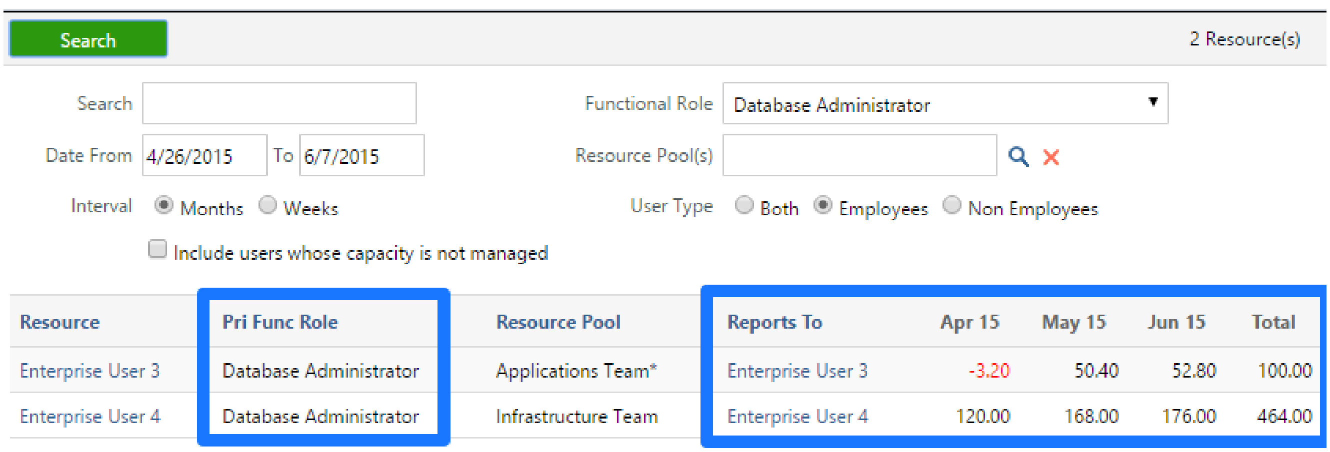


TeamDynamix

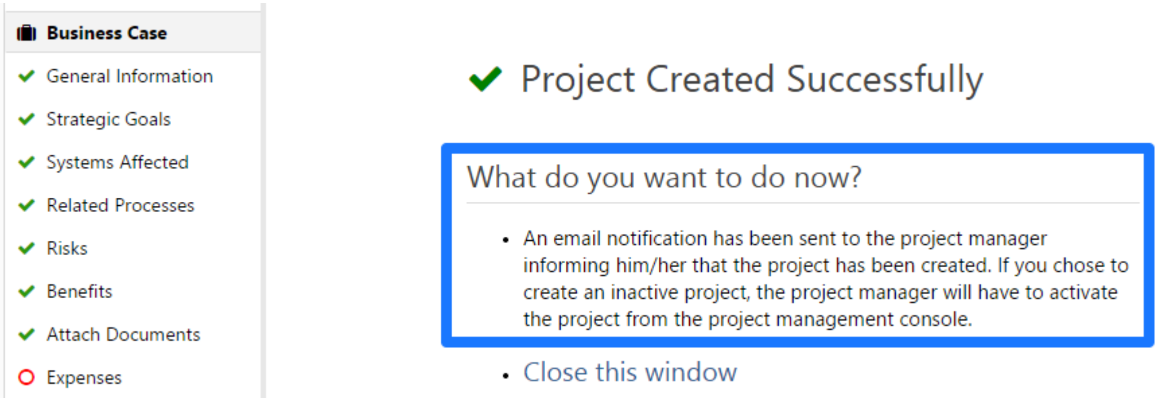
4. Next you will add actual resources to the project by replacing the functional roles that were specified during the project request process with actual individuals. **It is important to note that a resource can only be added to one functional role. You cannot add the same resource to multiple functional roles.** Click on the search icon to browse a list of users that are able to fulfill the role. Additionally, you will need to select one user to be the manager of the project.



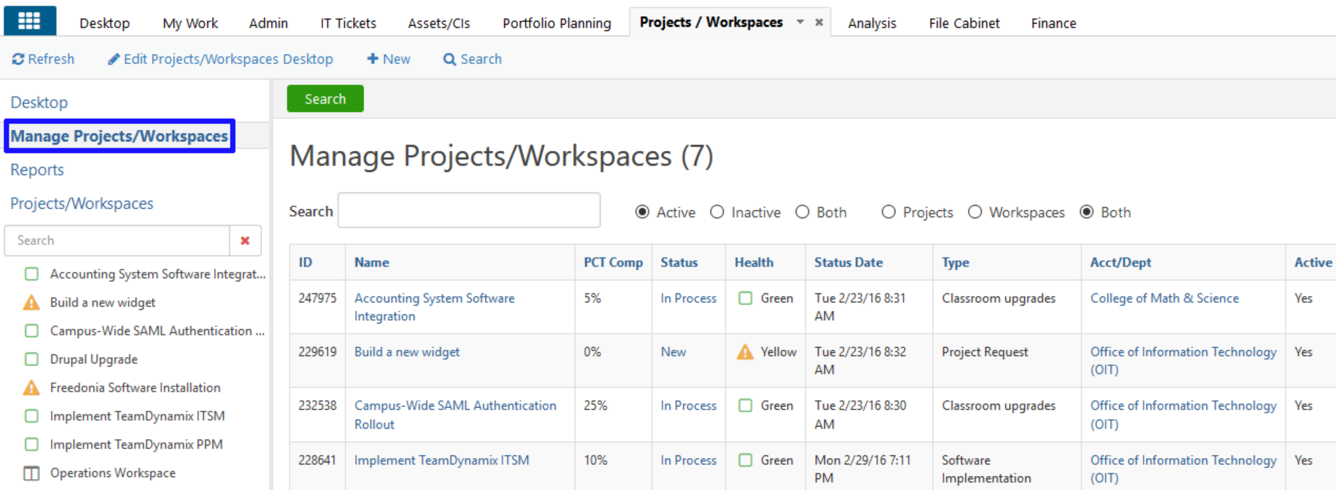
5. You will be able to view the availability of a resource when you click the search icon. It is also important to note that users that have the specified role as either primary or secondary will display in the availability lookup.



6. Once you add the resources to the project and click next, the project will be created. A notification will go to the project manager. **It is important to note that the project may be inactive depending on if the active box was checked/unchecked. It is the responsibility of the project manager to prepare the project for kick-off and then activate the project.**


Business Case
General Information
Strategic Goals
Systems Affected
Related Processes
Risks
Benefits
Attach Documents
Expenses
Project Created Successfully
What do you want to do now?
An email notification has been sent to the project manager informing him/her that the project has been created. If you chose to create an inactive project, the project manager will have to activate the project from the project management console.
Close this window

Once the project request has been staffed, it will no longer appear in the Portfolio Planning application. It will now be administered from the Projects/Workspaces application by the resource that was specified as the manager of the project.

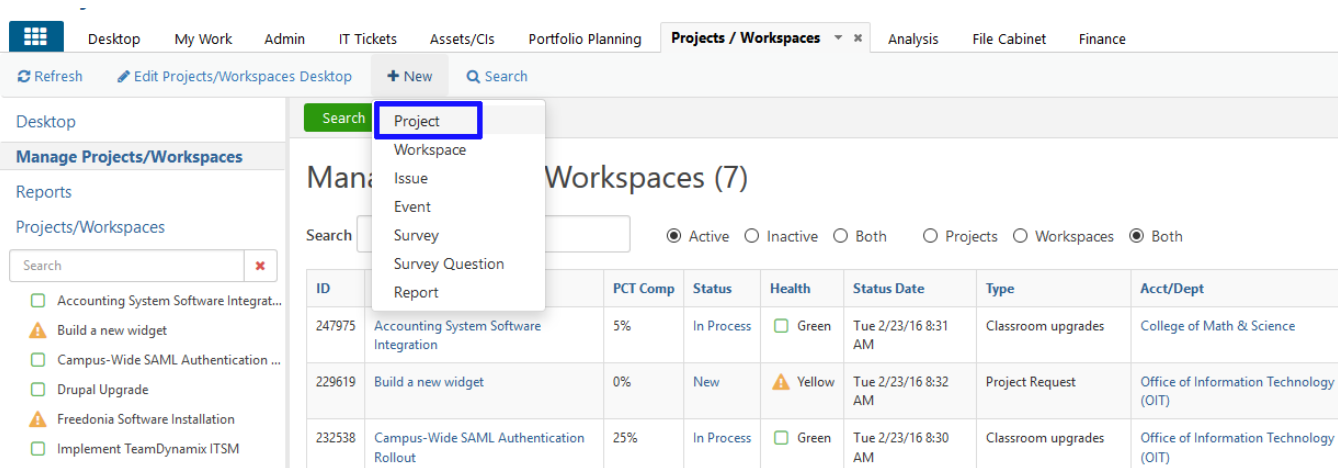


DIRECTLY CREATING A NEW PROJECT

It is worth noting that, in some cases, you may need to directly create a new project. Assuming your user account has the permissions to "Add Projects", you can accomplish this from the Projects/Workspaces application in TDNext. Note: By directly creating a new project, you will bypass the project request process and a new, active project will exist as soon as the required information is populated.

Use the following steps to create a new project:

1. In TDNext, open the Projects/Workspaces application via the application menu or a tab
2. Click new and a dropdown list will appear, click Project.



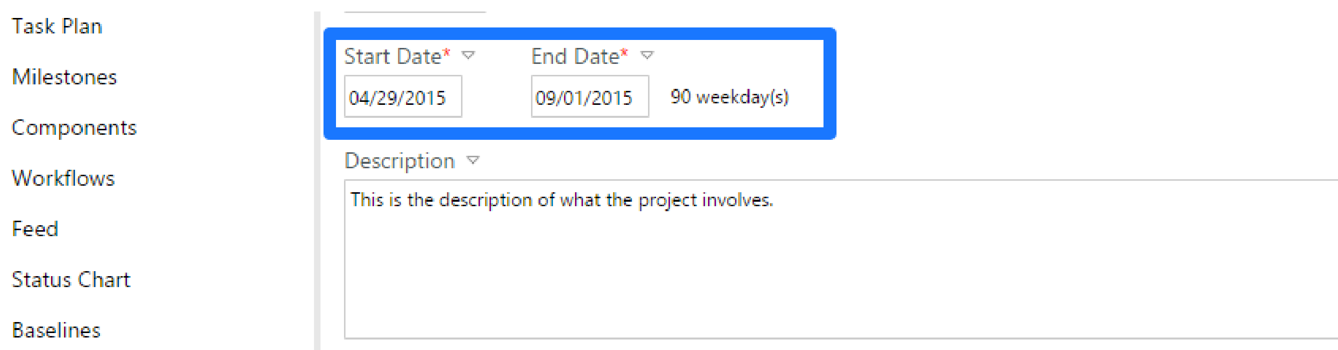
PROJECT MANAGEMENT AND ADMINISTRATION

It is the project manager's responsibility to maintain the project through its life cycle. Primarily, this will include managing the project settings, editing, and maintaining resources, updating the project status and closing the project at its completion.

There are several settings found within the Project on the Administration → General section. Several of these settings are worth noting as they may be key to the management of the project.

- Activate/Deactivate – Within the Actions menu of a project (accessible from the Project Details > Action button), a project's active status can be toggled. If a project is active, all members of the project will be able to see it from the Project application and from the Client Portal. If the project is Inactive, only the project manager will have access to the project. Setting a project to inactive essentially prevents work from being done on the project. It also specifically disallows time and expenses from being added to the project.

- The Start and End Date on the General section of a project indicates the start and end date of the project and the "window" in which resource scheduling takes place. Any time allocated to a resource for the project will fall between the start and end dates listed on the project.

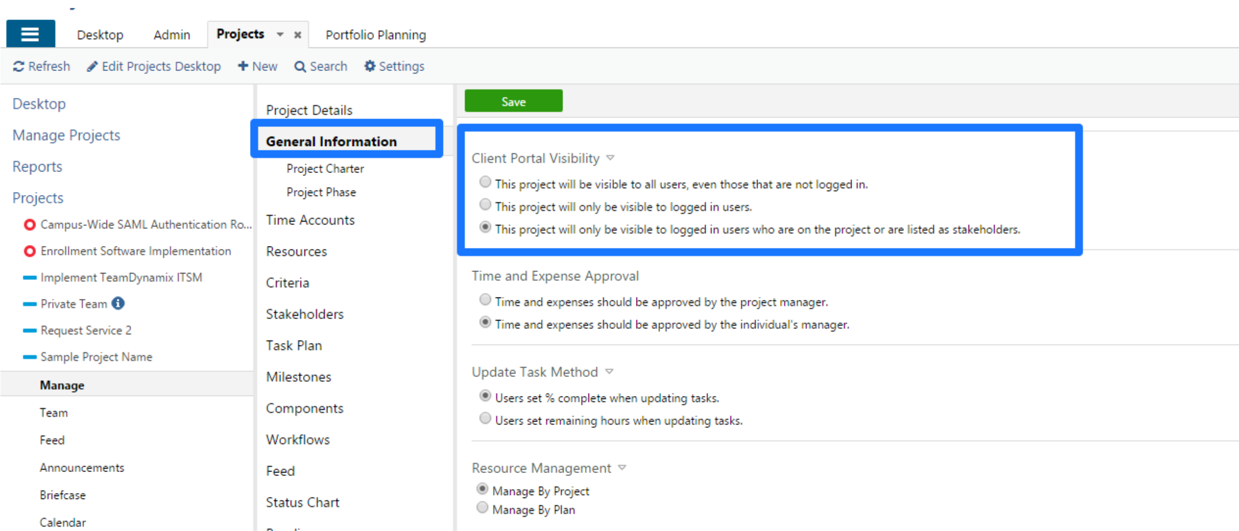


- T&E Approval specifies how time and expenses submitted against the project are approved. If set to be approved by the project manager, all time and expenses (once submitted) will go to the project manager for approval. Otherwise, time and expenses will go to each resources manager as indicated within the user's profile → Reports To.

- The Client Portal Visibility settings control whether or not a project can be viewed within the Client Portal. The Client Portal is the site where non-licensed users of TeamDynamix, such as Stakeholders, Sponsors, Functional Users, and the like can view the project. A project can be set to varying levels of Client Portal visibility. To modify this setting one must be a manager of the project.

  Open the Manage section within the Project, go to General Information, scroll to locate Client Portal Visibility. The three options are seen in the in image below:

  - **Project visible to all users, even those that are not logged in** – If this is selected the project is publicly visible and does not require authentication to be viewed. Anyone with the link to the Client Portal can view the project, even Internet users outside of the institution.
  - **Project visible only to logged in users** – If this is selected, a user must authenticate to the Client Portal before the project can be viewed.
  - **Project visibile only to logged in users who are on the project (as a resource) or listed as a stakeholder on the project** – If this is selected, a user must be part of the project in some capacity, either as a resource or as a stakeholder, to view the project within the Client Portal.



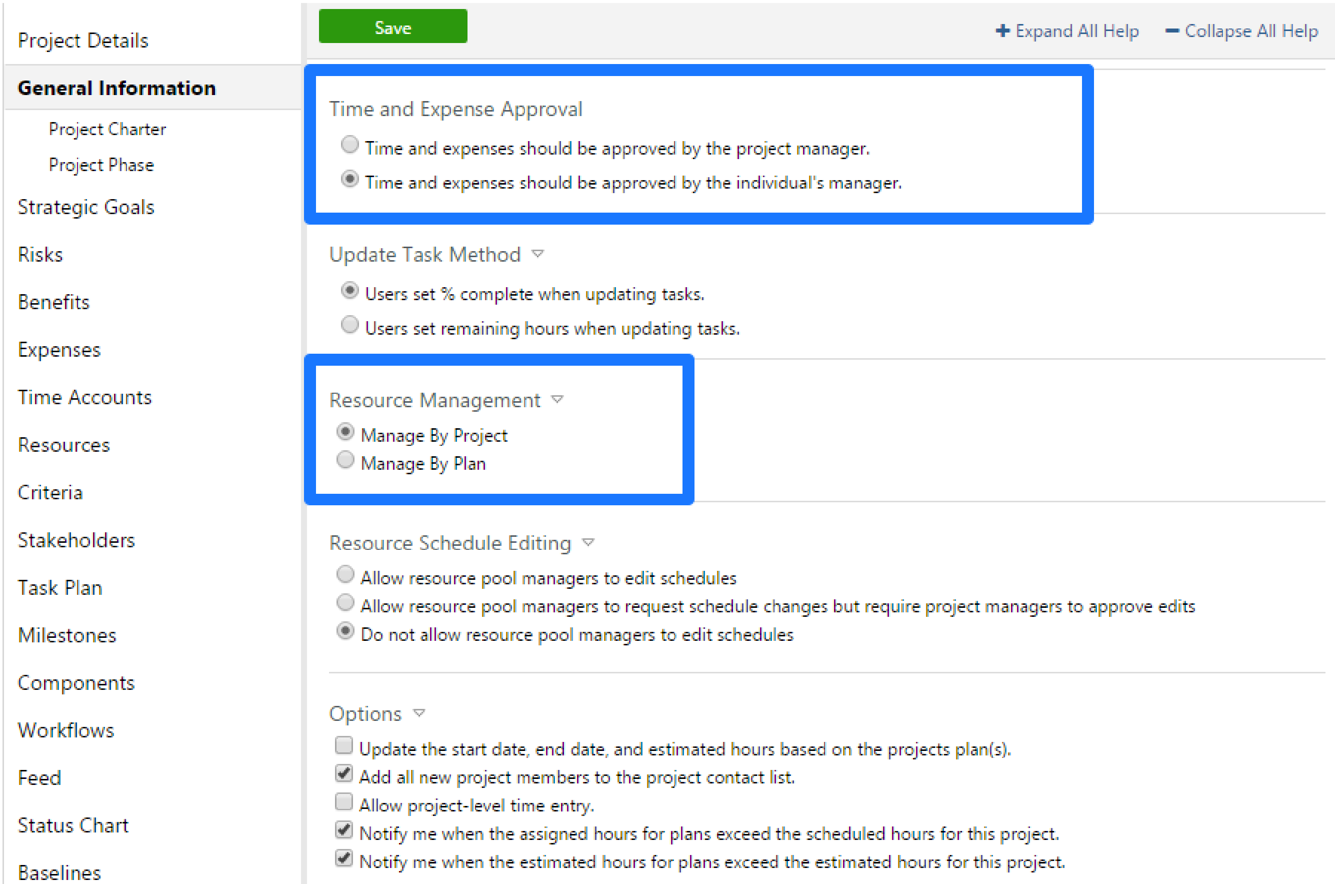
- There are two Resource Management options available on a project. This setting determines how the project's estimated work time is deducted from a resource's overall capacity.

    - The first option, **Manage By Project**, indicates that the resource time will be deducted based on the values entered on the Resource Section of the Project. More specifically, when you added resources to a project, you set the number of hours this resource was allocated to the project. Those are the specific hours that will be deducted from the resource's capacity.

    - Alternatively, **Manage By Plan** will deduct hours from a resource's availability based on the hours estimated on tasks the resource is assigned within the project plan.

      Typically, **Manage By Project** is for situations when a detailed project plan is not needed or for project managers who do not create a detailed project plan with estimated work efforts. Additionally, it is very common to start a project as **Manage By Project** and then switch to **Manage By Plan** once a detailed WBS (Work Breakdown Structure) has been established.

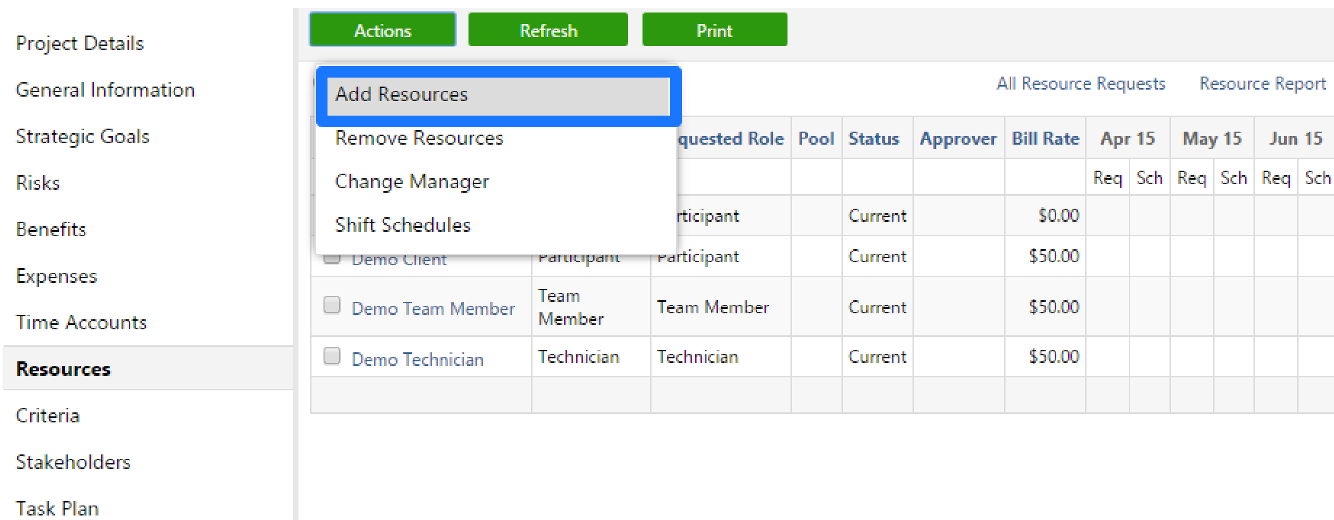
      One final note, if **Manage By Project** is selected, in the Options area, the checkbox "Allow project-level time entry" needs to be selected as well.


Project Details
General Information
Project Charter
Project Phase
Strategic Goals
Risks
Benefits
Expenses
Time Accounts
Resources
Criteria
Stakeholders
Task Plan
Milestones
Components
Workflows
Feed
Status Chart
Baselines
Save
Expand All Help
Collapse All Help
Time and Expense Approval
Time and expenses should be approved by the project manager.
Time and expenses should be approved by the individual's manager.
Update Task Method
Users set % complete when updating tasks.
Users set remaining hours when updating tasks.
Resource Management
Manage By Project
Manage By Plan
Resource Schedule Editing
Allow resource pool managers to edit schedules
Allow resource pool managers to request schedule changes but require project managers to approve edits
Do not allow resource pool managers to edit schedules
Options
Update the start date, end date, and estimated hours based on the projects plan(s).
Add all new project members to the project contact list.
Allow project-level time entry.
Notify me when the assigned hours for plans exceed the scheduled hours for this project.
Notify me when the estimated hours for plans exceed the estimated hours for this project.

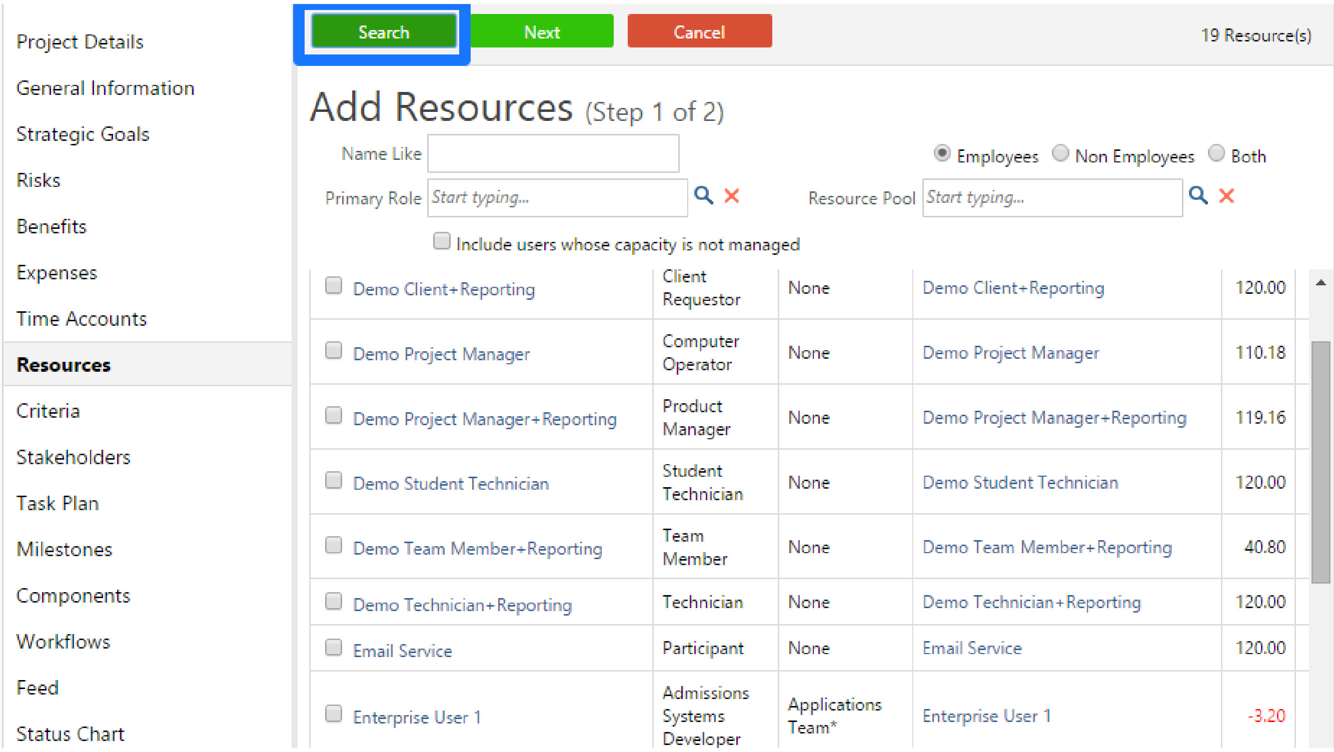
Editing Project Resources

To add resources to a project, the resource must be added to the "Resource" section of the Project Details window. It is important to note that only resources that are added to the project will be available within the plan manager for task assignments on project plans. Also, a resource will only be available for the date range that falls between the start and end dates indicated on the Project Details → General section. To add a resource to a project, follow the steps below:

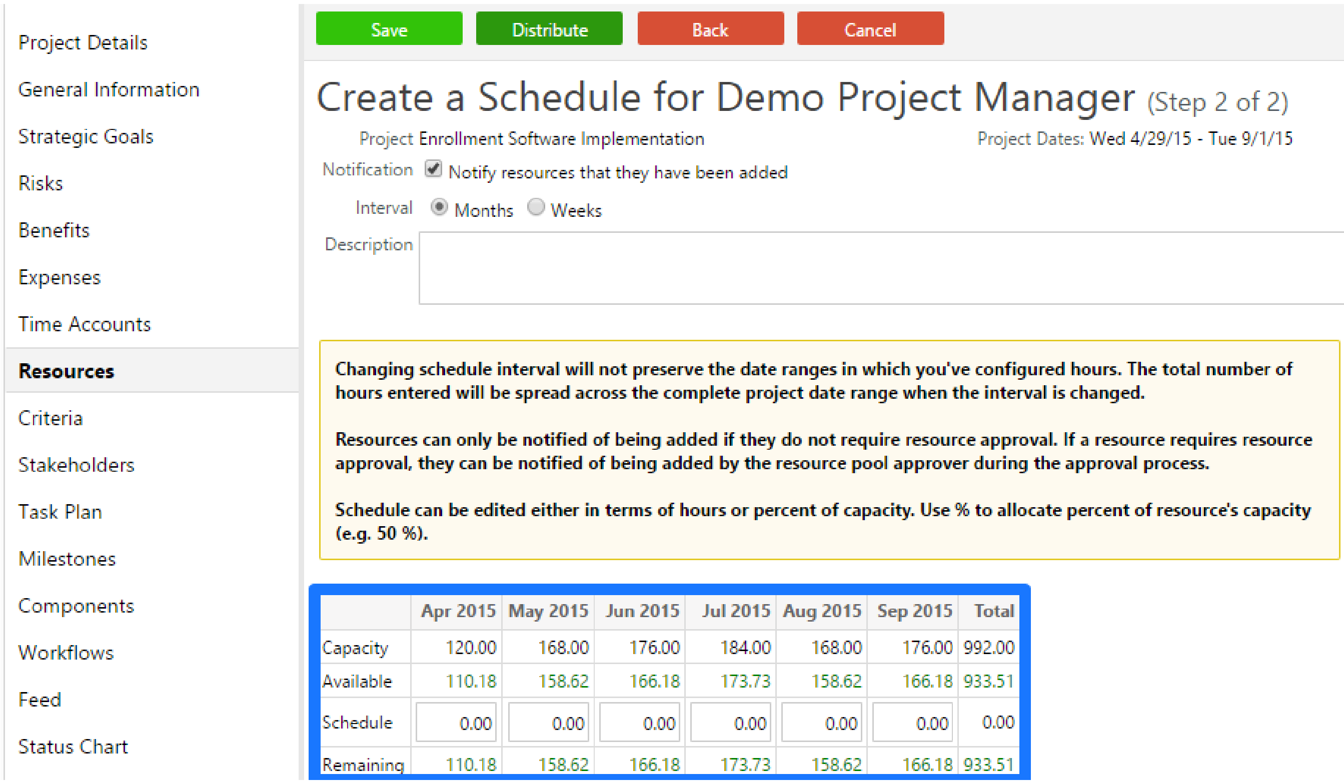
1. From the Resources section of the project, click the Actions > Add Resources button.



2. You can click Search to view all available resources or filter resources by name, primary role, resource pool, and employee status.



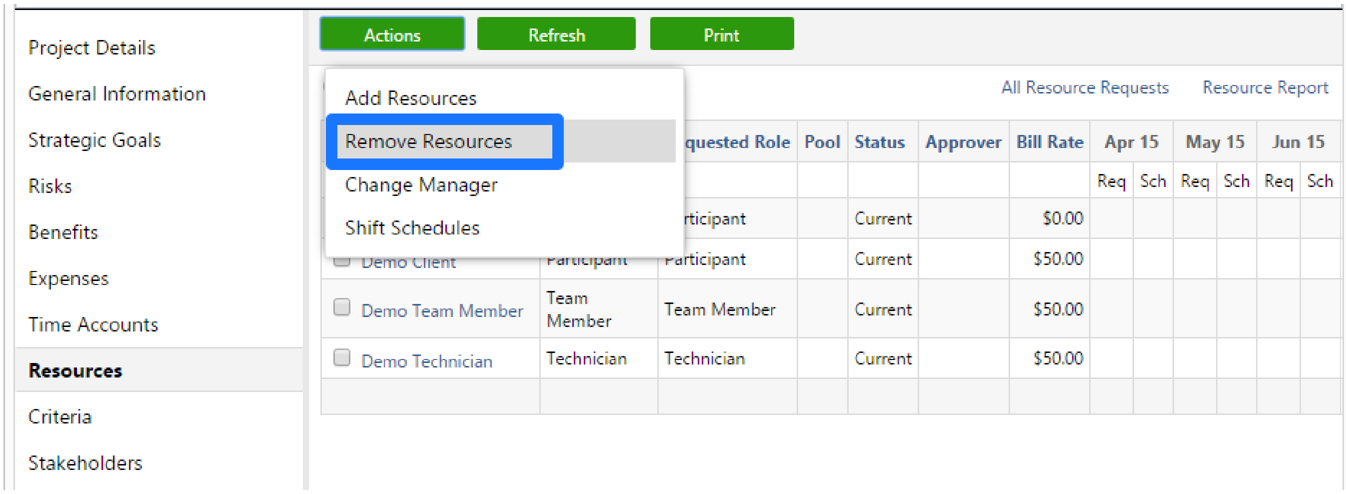
3. Select a resource by clicking on the resource's name and then create a schedule for the resource. You will notice the resource's availability for the time frame of the project.



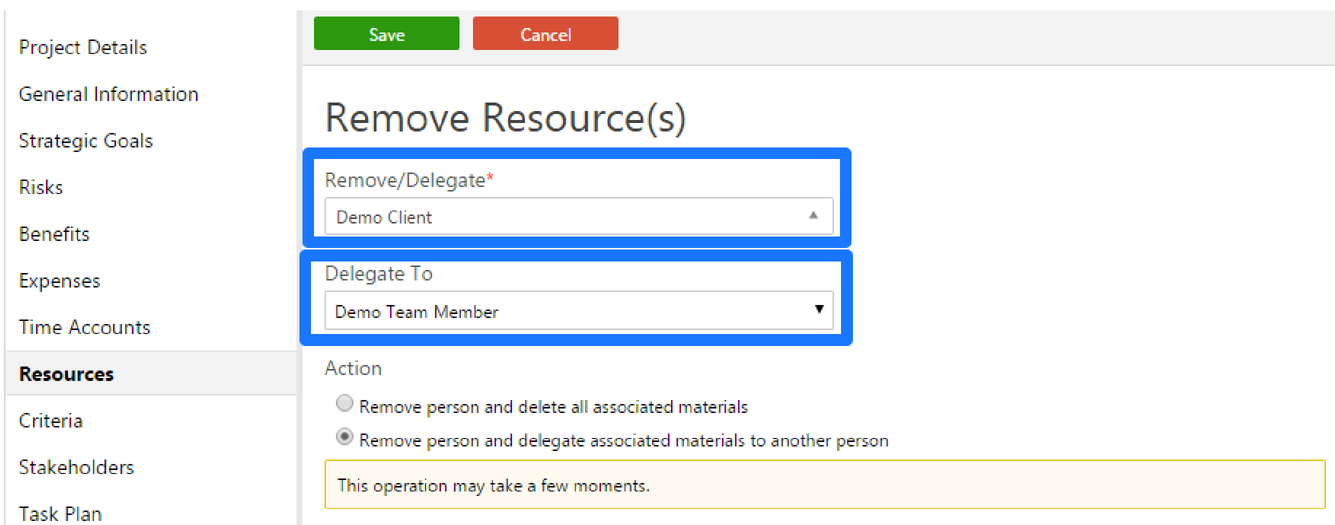
4. Finish adding the resource to the project by clicking the Save button. If the resource requires approval, it is important to note that the resource will not be officially added to the project until the resource manager approves the resource request.

In addition to adding resources, from time-to-time resources may need to be pulled off a project. To remove a resource from a project, follow the steps below:

1. From the Resources section of a project, click the Remove Resource button.



2. Select the resource to remove and also select a resource to delegate project resources to. When a resource is removed, any tasks that resource owns in a project plan will be reassigned to the "Delegate To" resource.

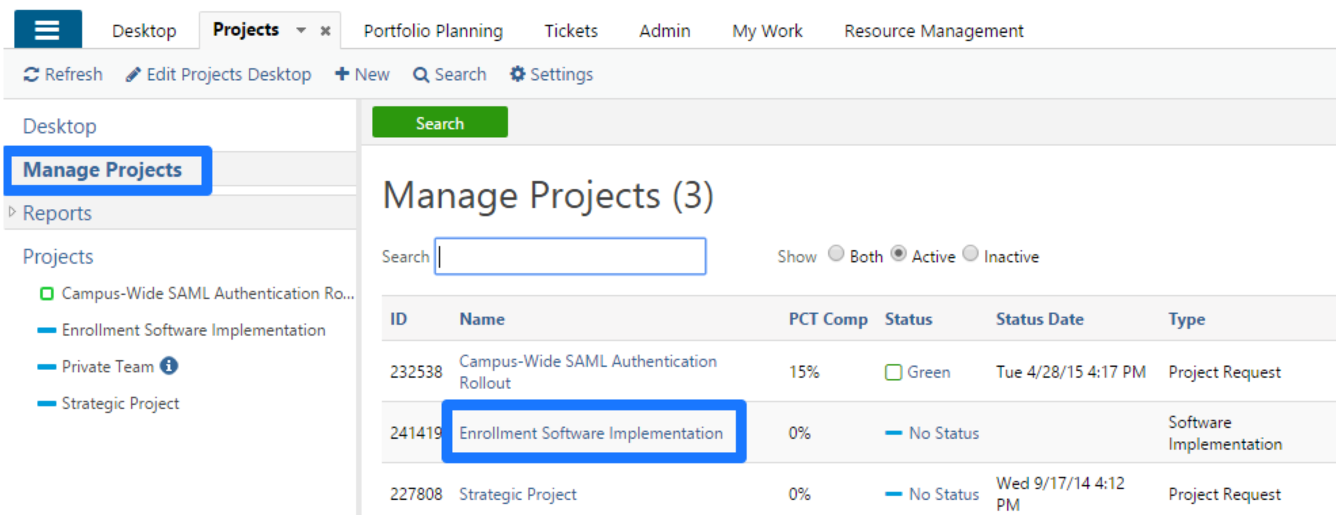


3. Select whether or not to associate the materials to the new resource. Then, click the Remove Resource button. If you choose to delegate the materials, project documents, issues, contacts, etc. will be delegated to the new resource. Otherwise, these items will be deleted. Note: Project tasks will not be deleted and will always be delegated to the new resource.

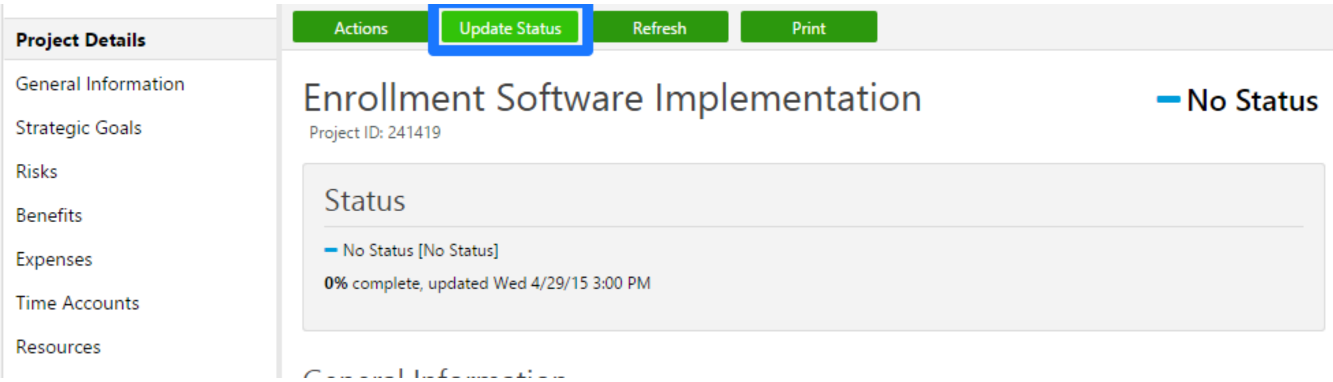
Updating a project's status and closing a project

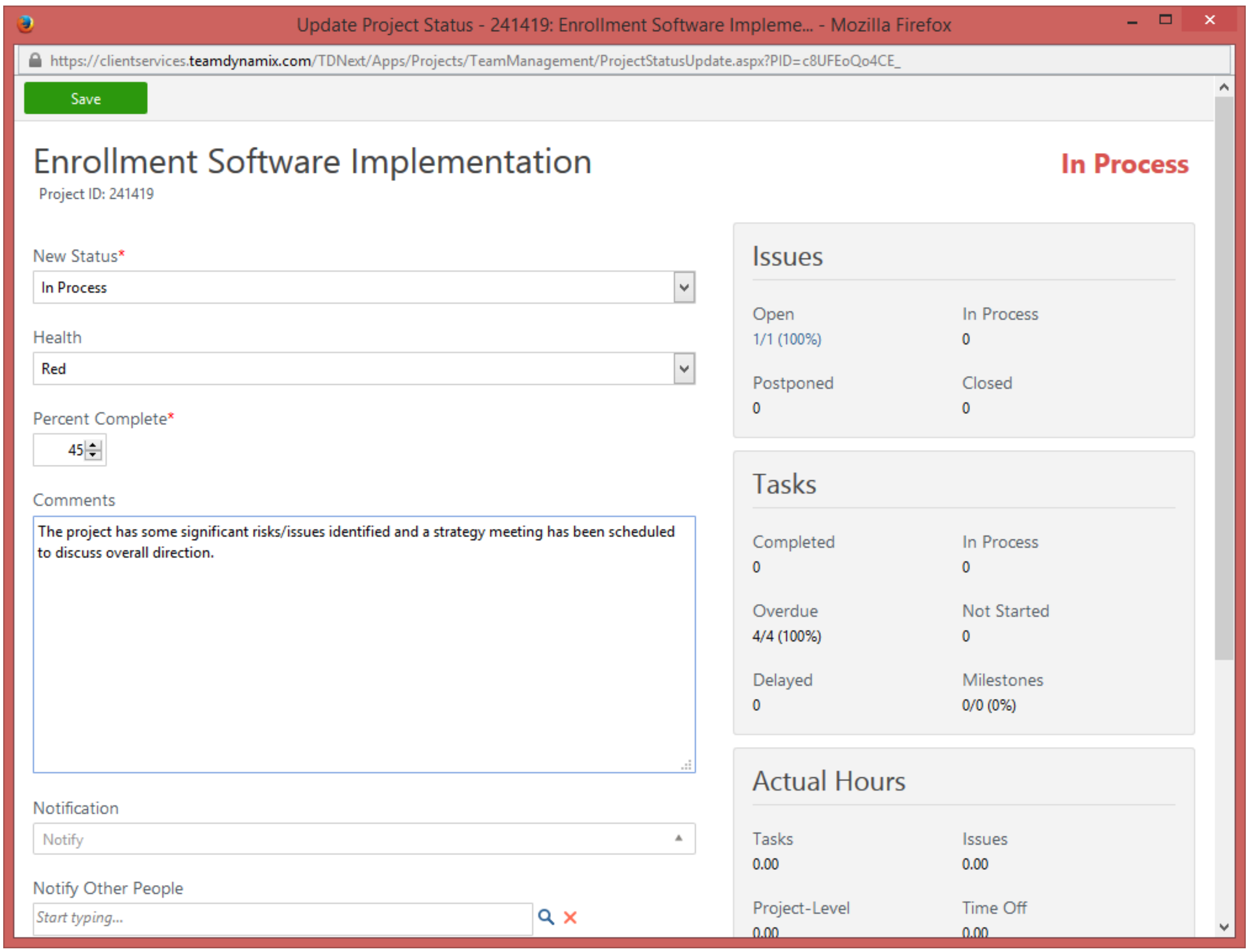
One of the most important tasks a project manager must perform are regular updates to the project's status and closing out projects when they are completed or canceled. Many of the Analysis reports depend on the project status being regularly updated. Additionally, project managers will receive an email notification on a regular basis (depending on a global configuration setting) to update the status of any open and active projects. To update the status of a project and to close a project, follow the steps below:

1. From the Projects/Workspaces Application, click on Manage Projects and select the name of a project to open the Project Details window.



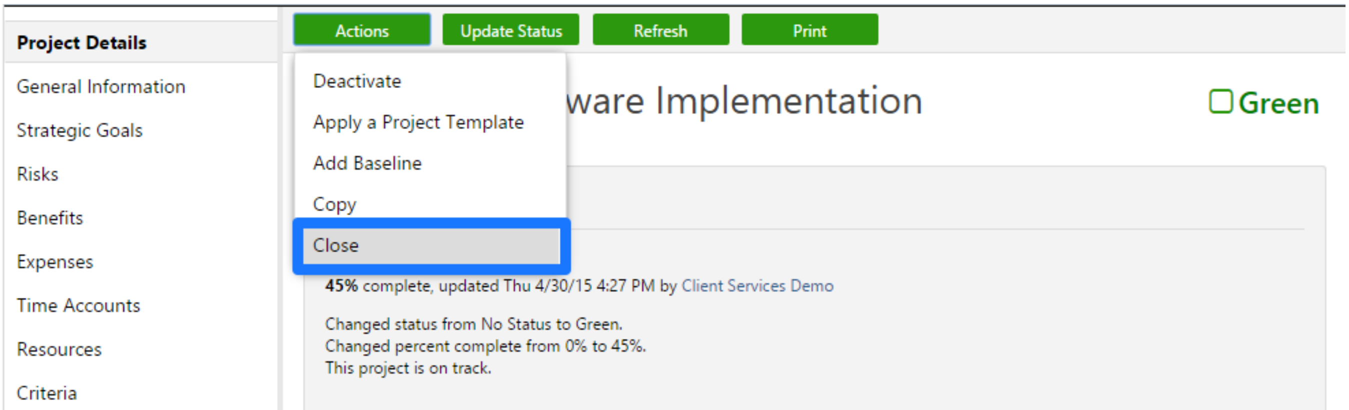
2. From the Project Details view, click the Update Status button. When updating the status, the following must be provided:
   - Status – Describes the "state" of which the project is in. By default, status values are "New", "In Process", and "On Hold". However, the TeamDynamix Administrator may have customized these values so that they are tailored to the institution's processes.
   - Health - Either Red, Yellow, or Green
   - Overall Percent Complete - This value is determined by the project manager. It is not a calculated value based on tasks/issues completed. Information on tasks, issues and hours is provided so that the project manager can make and educated estimate on percent complete.
   - Comments - This should be a summary from the project manager on the current state of the project. This information also shows in several Analysis reports.


Project Details
General Information
Strategic Goals
Risks
Benefits
Expenses
Time Accounts
Resources
Actions
Update Status
Refresh
Print
Enrollment Software Implementation
Project ID: 241419
No Status
Status
No Status [No Status]
0% complete, updated Wed 4/29/15 3:00 PM


Update Project Status - 241419: Enrollment Software Impleme... - Mozilla Firefox
https://clientservices.teamdynamix.com/TDNext/Apps/Projects/TeamManagement/ProjectStatusUpdate.aspx?PID=c8UFEoQo4CE_
Save
Enrollment Software Implementation
Project ID: 241419
In Process
New Status*
In Process
Health
Red
Percent Complete*
45
Comments
The project has some significant risks/issues identified and a strategy meeting has been scheduled to discuss overall direction.
Notification
Notify
Notify Other People
Start typing...
Issues
Open
1/1 (100%)
In Process
0
Postponed
0
Closed
0
Tasks
Completed
0
In Process
0
Overdue
4/4 (100%)
Not Started
0
Delayed
0
Milestones
0/0 (0%)
Actual Hours
Tasks
0.00
Issues
0.00
Project-Level
Time Off

Closing a Project

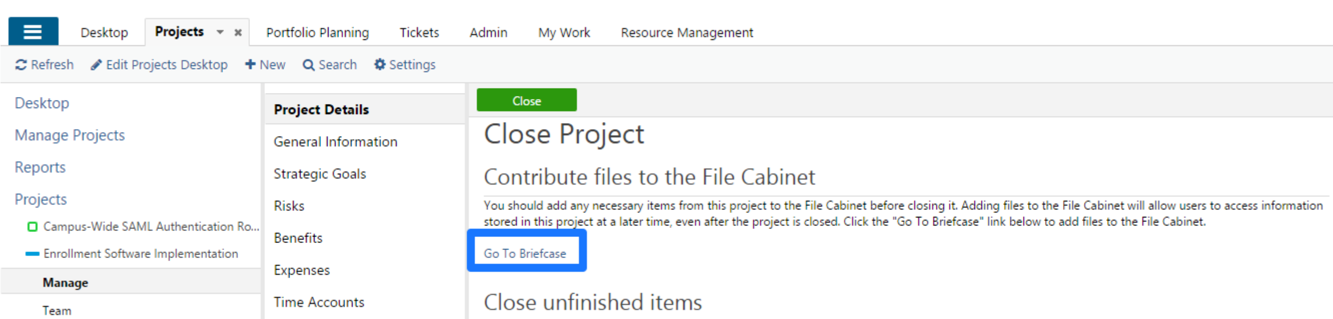
Closing a project is similar to updating. In fact, you should always perform one last update on a project before closing it so that the last status is captured in historical reports. After performing the status update, click the Actions button and select Close.



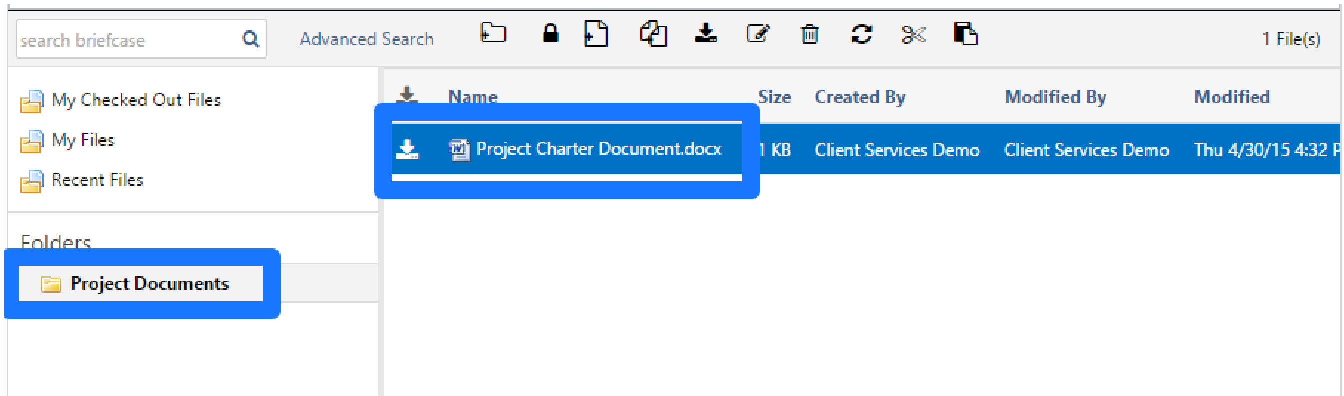
There are three steps to complete when closing a project:

1. Contribute briefcase files to the File Cabinet. The File Cabinet is a document repository that is accessible once the project is closed. Team Members and other users that were not part of the project will have access to the project briefcase. It is important to note that the briefcase can be accessed via Analysis once the project is closed out. Adding files to the File Cabinet is a few step process.

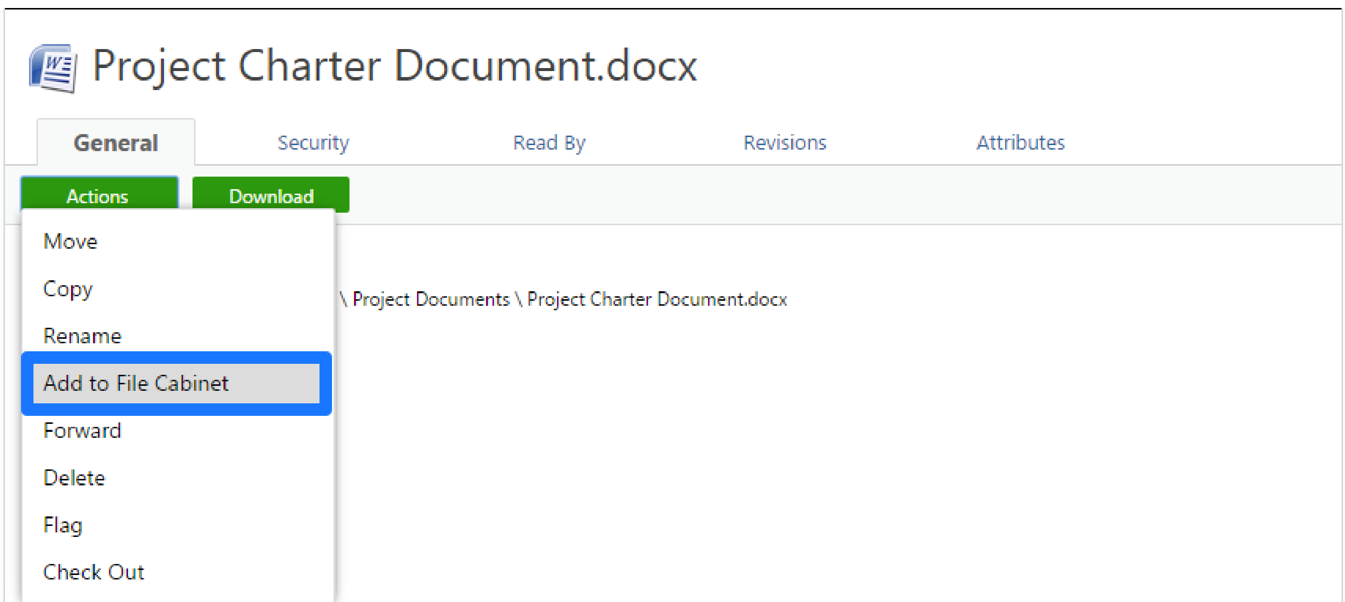
- The first step in contributing files to the File Cabinet is by visiting the briefcase.



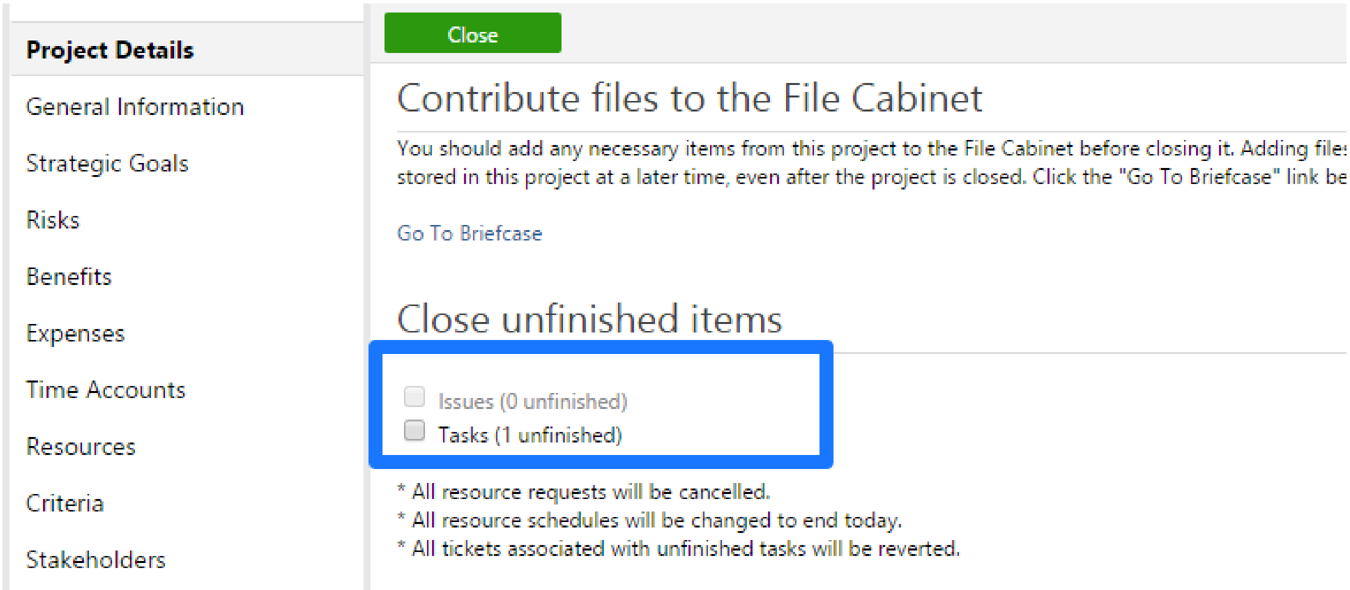
- Second navigate to the appropriate file that should be added, then select it.



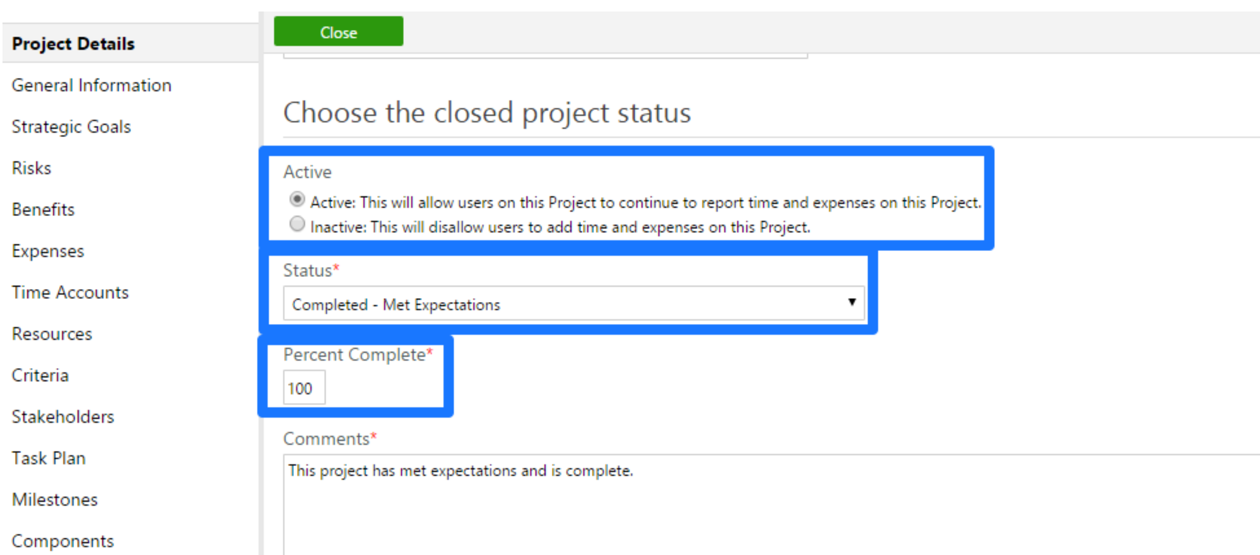
- In the last step, navigate to the Actions button and select to Add to File Cabinet.



2. Close any open issues and tasks. This is an optional step allowing the project manager to bulk close all open issues and/or tasks associated with the project.

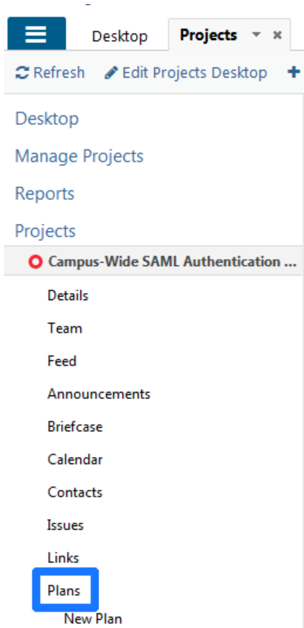


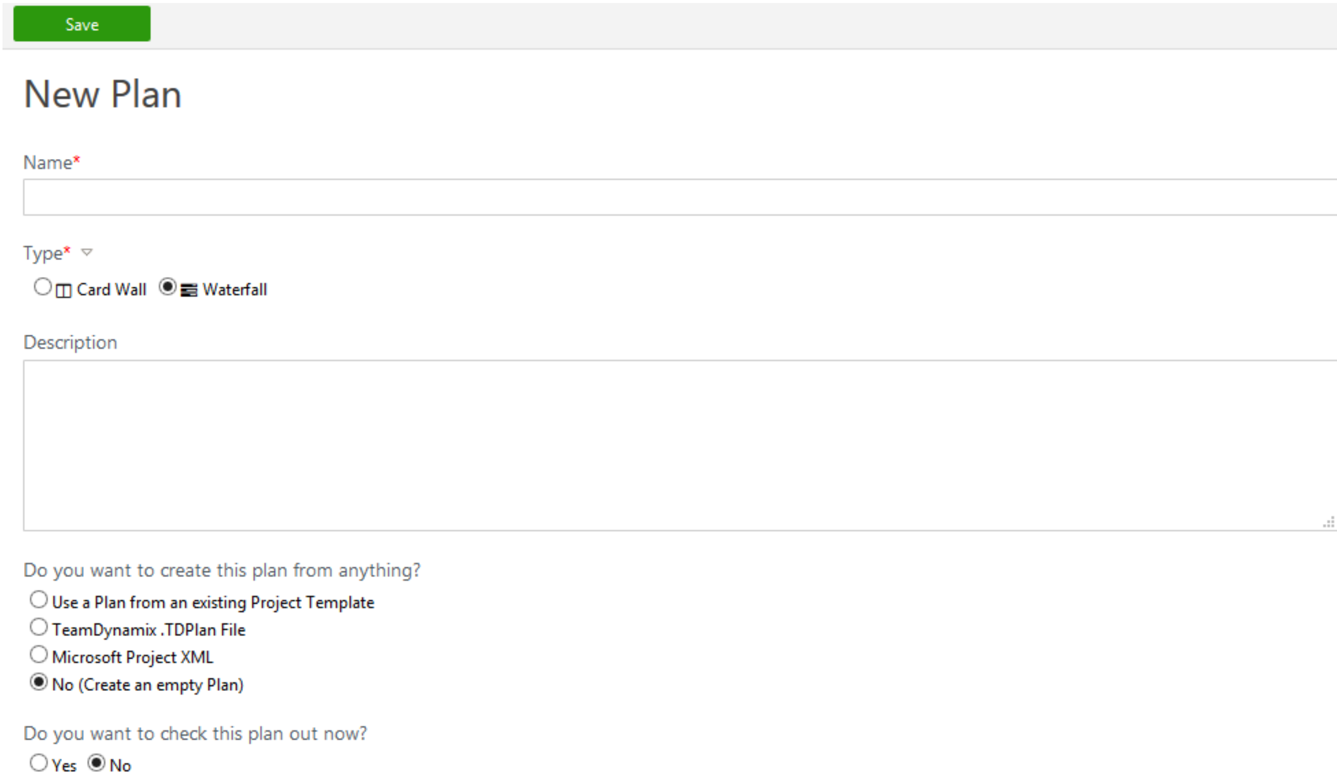
3. Chose the project close status. You will have the option of leaving the project active so that time and expenses can still be logged against the project. Also, you can set the close status to indicate if expectations will missed, met, or exceeded in addition to making a comment.



CREATING PROJECT TASKS

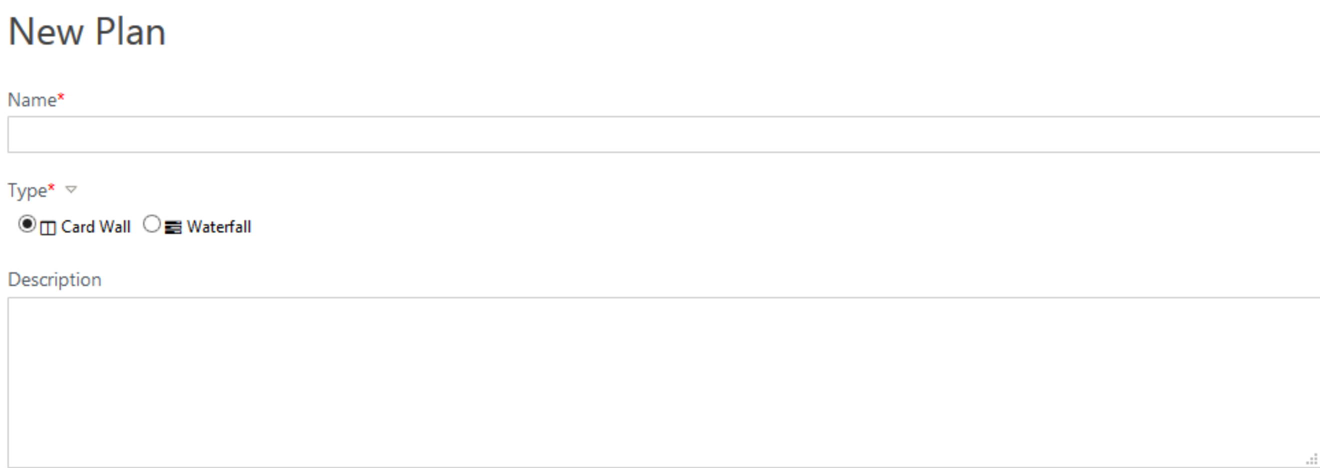
The Project's Plan section provides the ability to create a schedule of tasks (Waterfall) or a Card Wall in order to represent the activities that must be completed as part of the project. These tasks can be assigned resources on the project and will then show on each resource's list of assignments. To add a plan to a project, click on "Plans" within a specific project and then "New" to choose between a "Waterfall" type of plan or a "Card Wall".



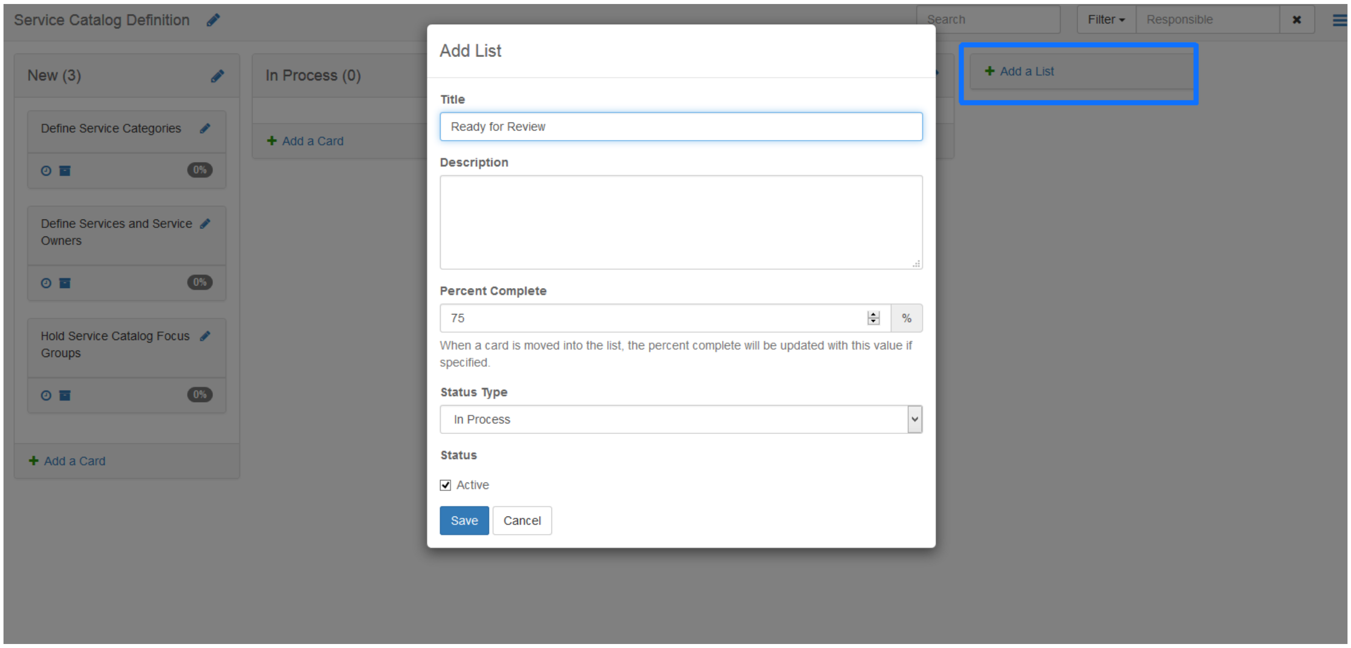

Save
New Plan
Name*
Type*
Card Wall
Waterfall
Description
Do you want to create this plan from anything?
Use a Plan from an existing Project Template
TeamDynamix .TDPlan File
Microsoft Project XML
No (Create an empty Plan)
Do you want to check this plan out now?
Yes
No

TeamDynamix Card Wall

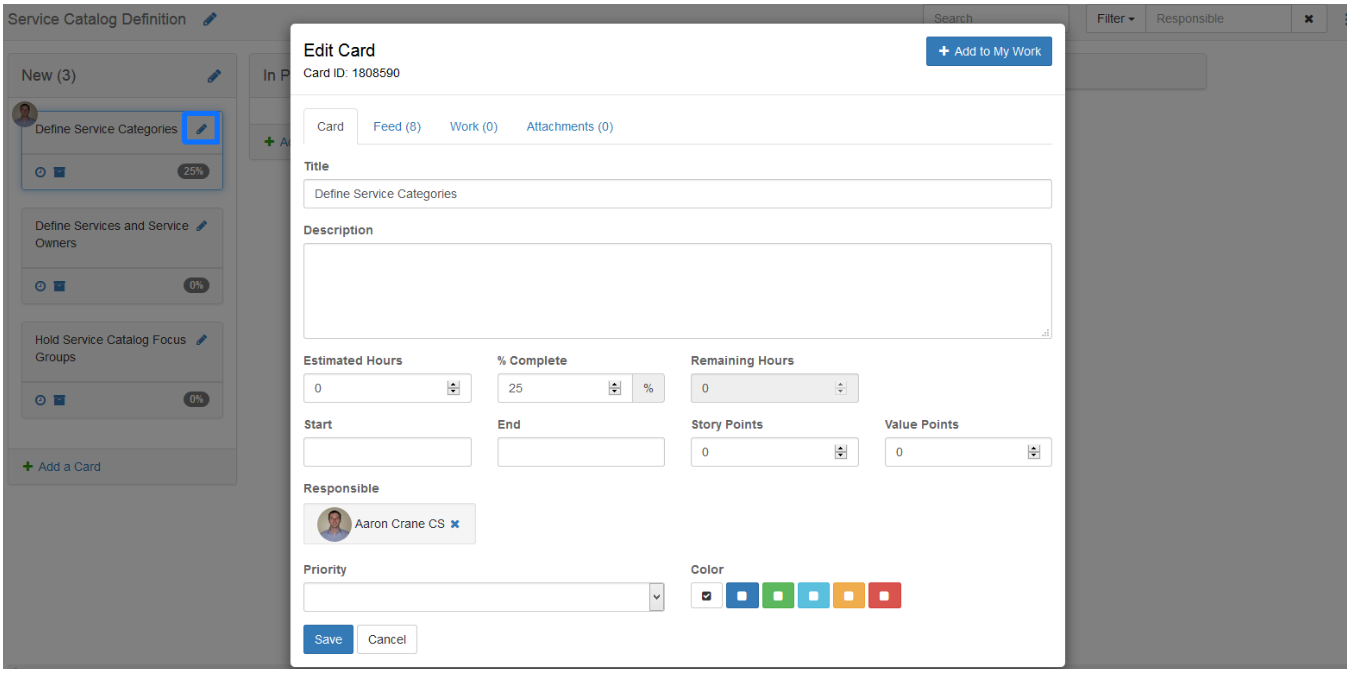
The TeamDynamix Card Wall tool can be used to define lists of tasks in certain “states”, such as “New”, “In-Process”, and “Completed”. Tasks can be moved, via drag-and-drop, from one list to another to indicate progress. Although a Card Wall is more traditionally used in Agile-type projects, a Card Wall can be created within TeamDynamix and used for any type of project.



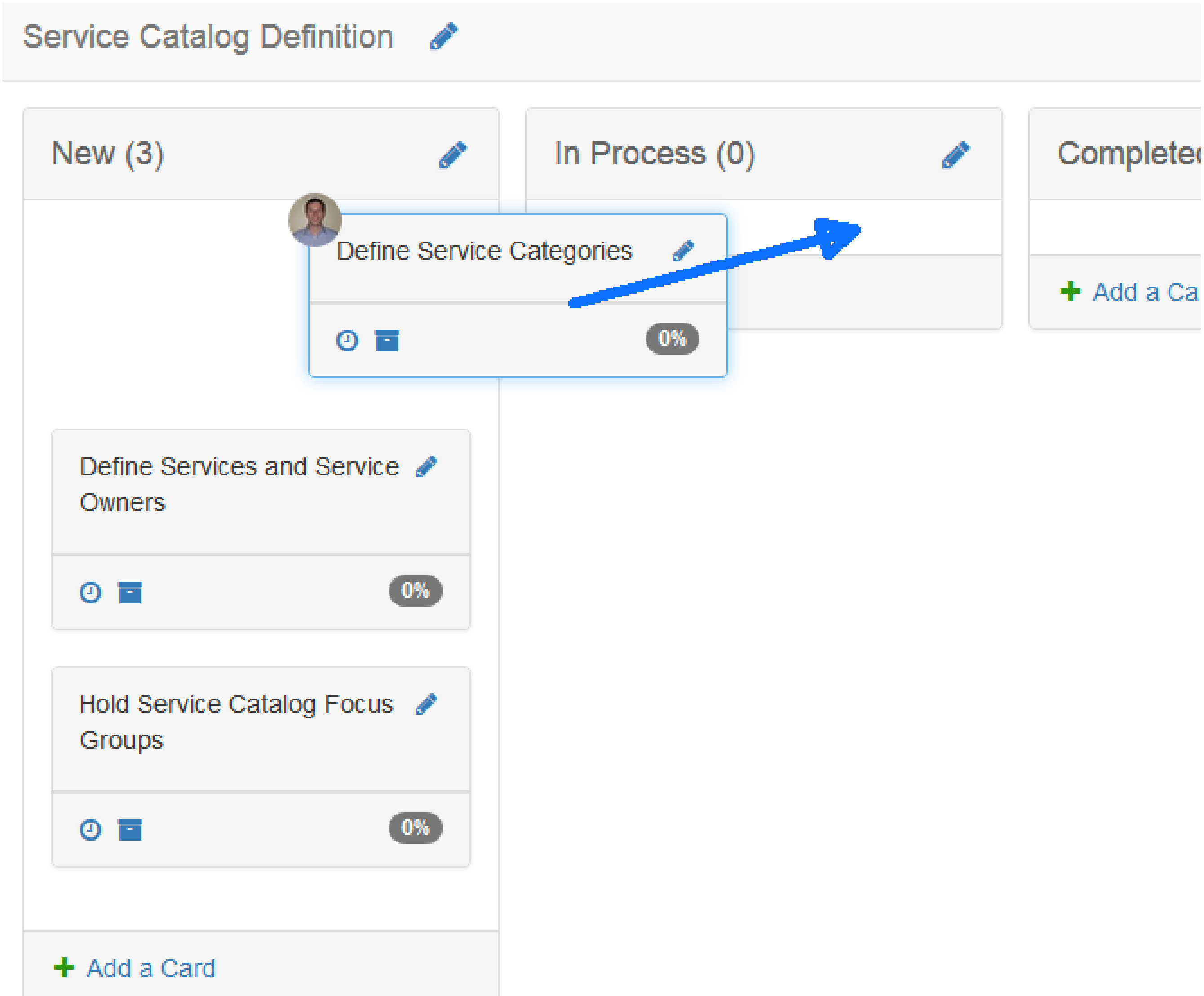
Once the card wall has been established, the default lists will display. The default lists are setup in the TeamDynamix Administration console. A new list can be created by clicking the "Add a List" option within the card wall.



Additionally, cards can be created within a list to represent the tasks for the project. Project Team Members can then drag the card from one list to another to represent the progress being made on each task. Multiple resources can be assigned as Responsible to a card wall task. Edits to any task can be made by clicking the pencil icon, including the start and end, setting priority, and adding estimate hours or points.

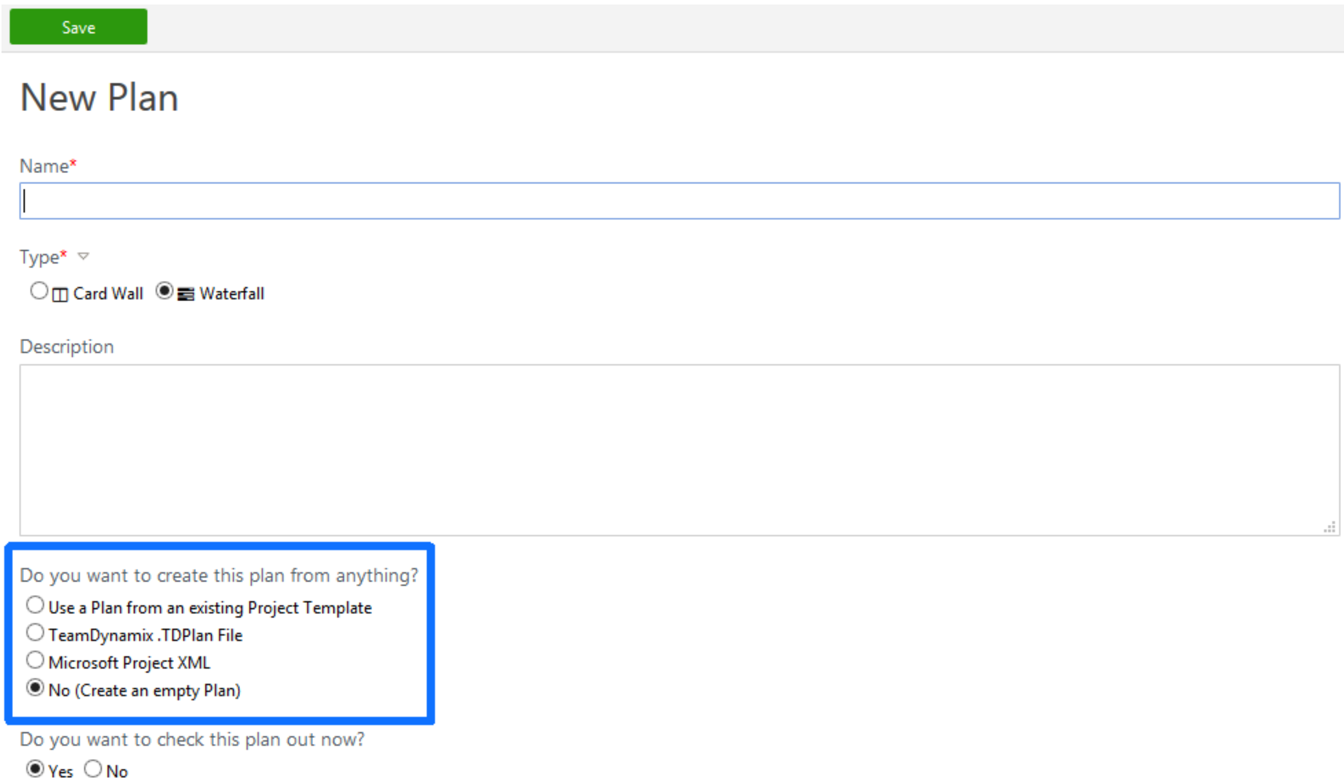


Moving a card from one list to another via dragging and dropping will change the percentage complete to correspond with the list's setting.

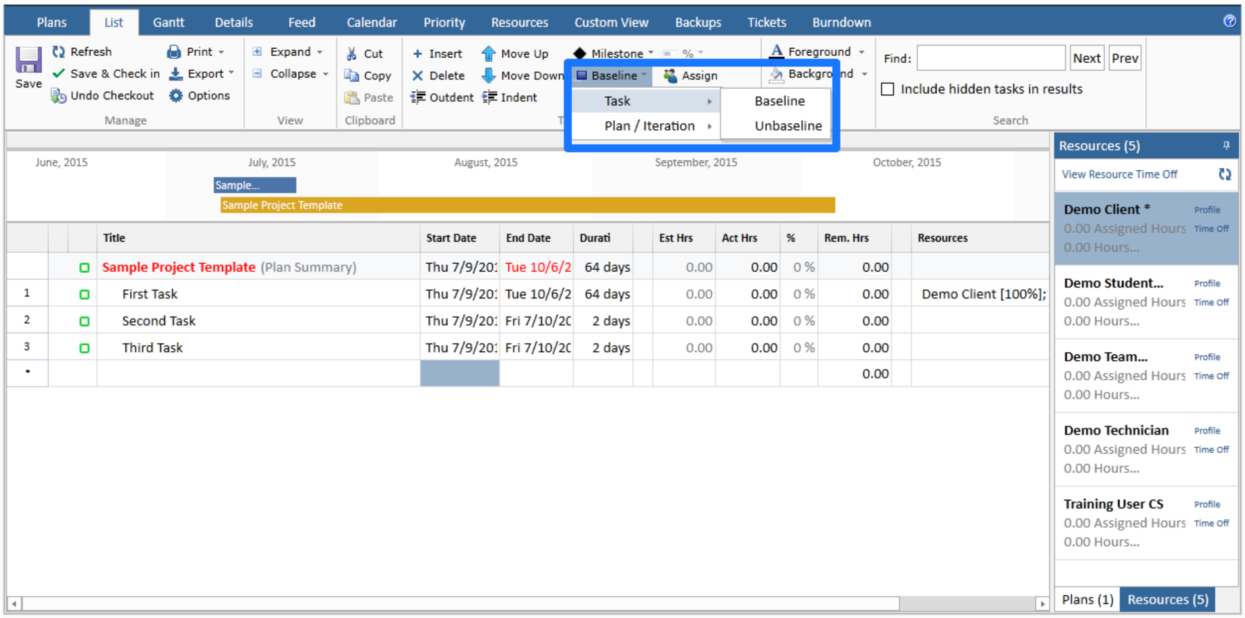


TeamDynamix Waterfall Plan

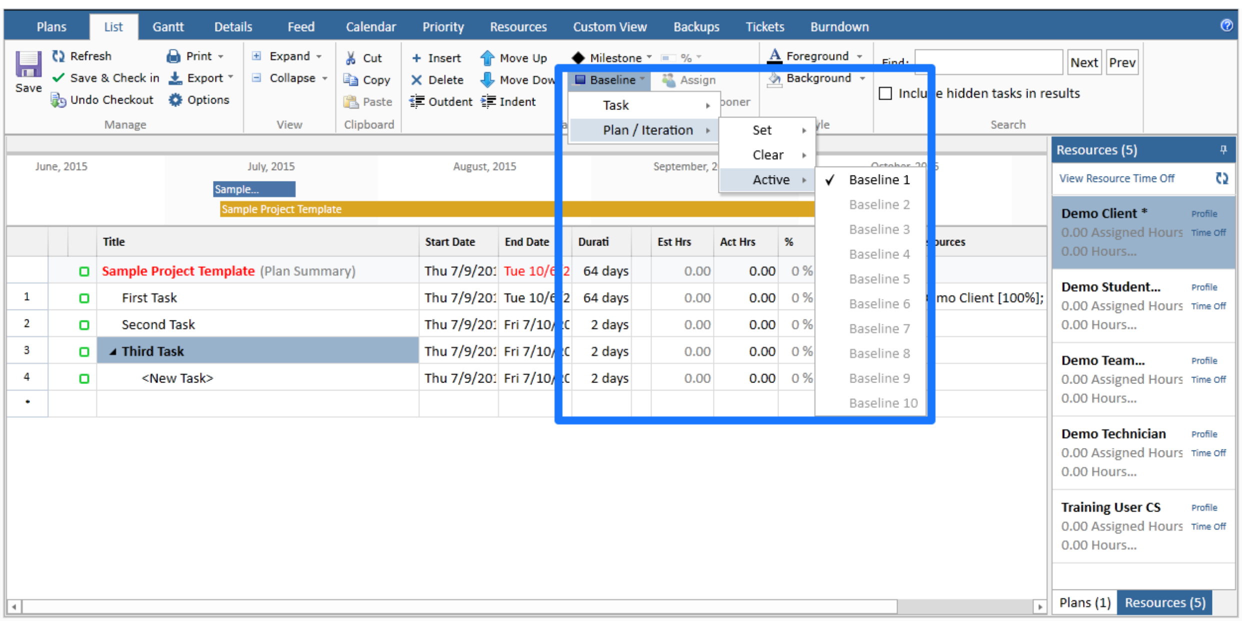
To create a Waterfall plan, select "Waterfall" as the option after clicking "New" beneath the plans section of a project. The plan must be given a name as well as deciding if a blank plan is to be created or if a plan should be created from a different source, such as a template or Microsoft Project file.



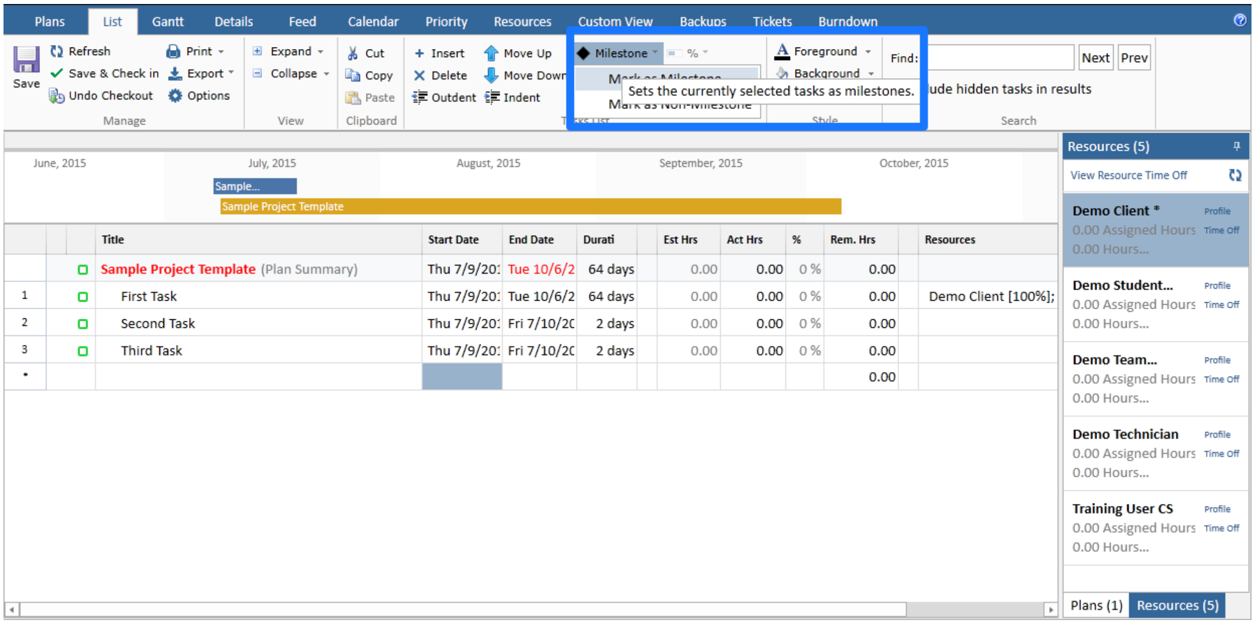
Once the plan has been established, tasks can be created within and then modified according to your project's schedule. It is important to note that the plan works in a "Check In/Check Out" fashion and must be checked out in order to edit. Once checked out, simply type in task row to create a new task. In addition, more advanced capabilities are also possible within the plan manager. For example, a plan can have a baseline added to it at any point of the process. A baseline can be applied to both the entire plan or down to the task level. As seen in the screenshots, to add a baseline visit the List or Gantt tab and select Baseline.



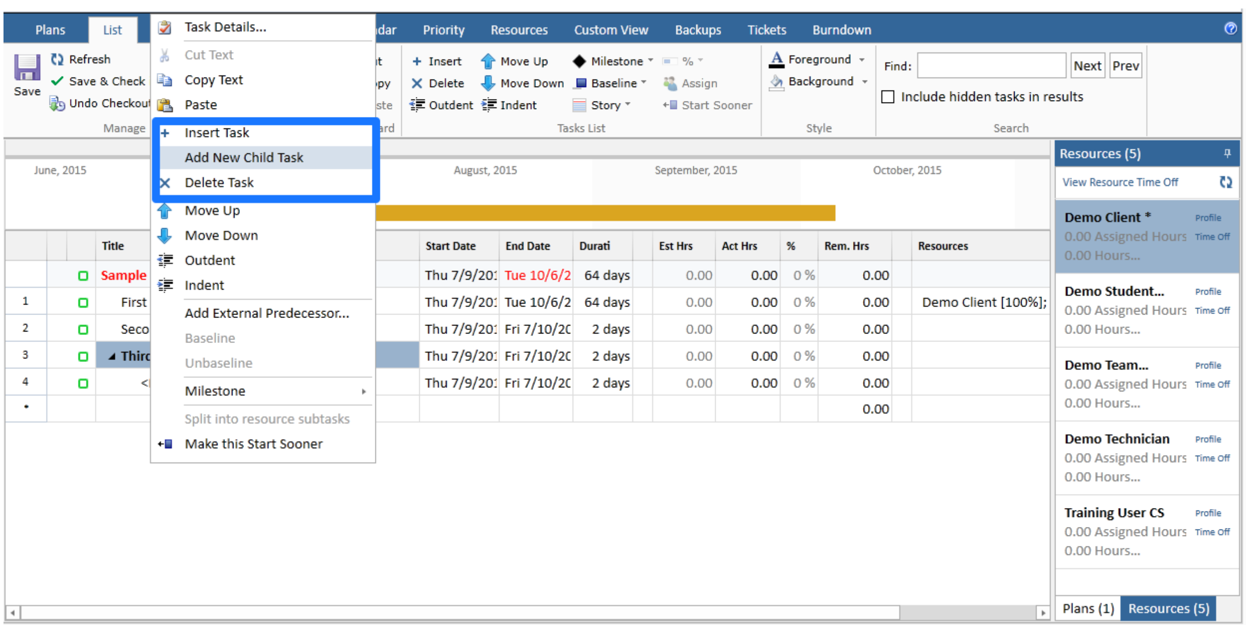
A list of the active baselines can be found by following the steps below. In this same interactive dropdown a user is also able to set and also clear baselines if desired.



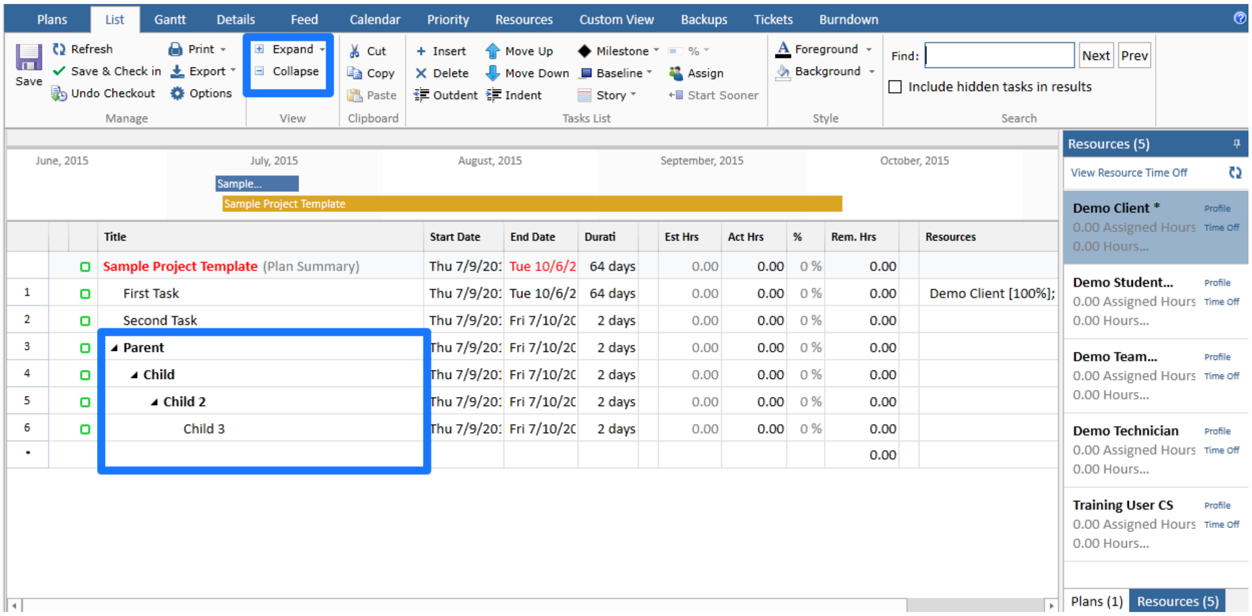
In the plan there may be key dates, deadlines, or possible needed equipment delivery. Mark these milestones by selecting Milestone on either the List or Gantt tab.



The project plan can be separated into categories, if desired. Doing so requires parent and child relationships to be created between tasks. To create a relationship, right click on an existing task and select to add a new child task. This will then make the clicked on task the parent of the just created task.



To view all tasks, or to collapse to the parent categories only, use the Expand and Collapse functions outlined below.

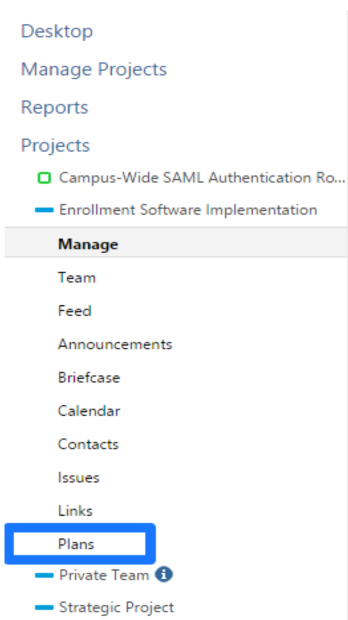


ASSIGNING WORK TO RESOURCES

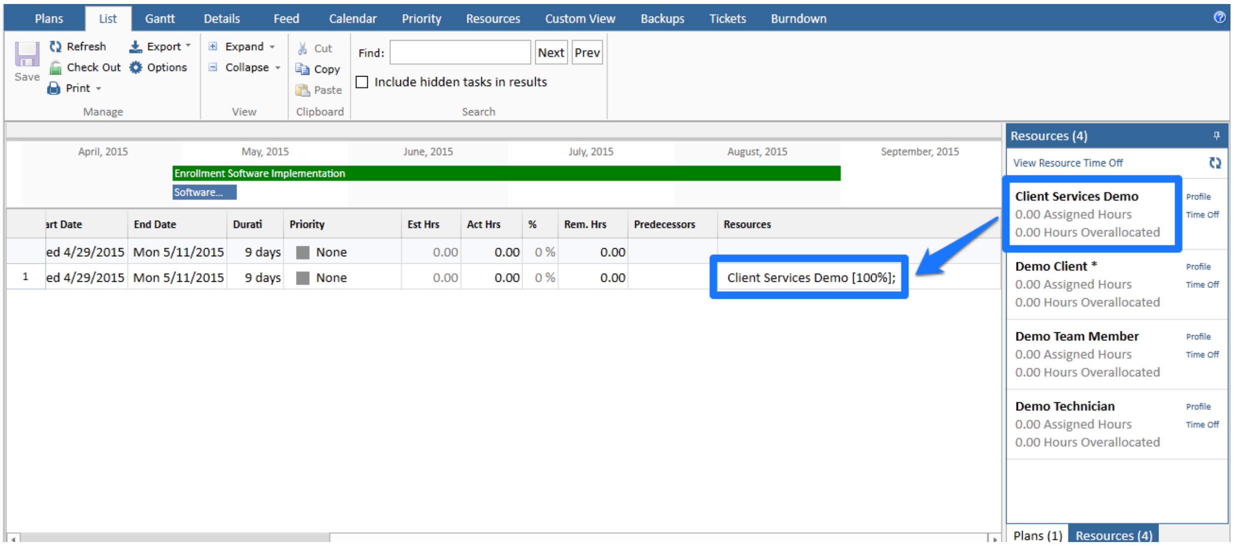
Assigning work to resources is the most critical task a project manager can perform. This will keep users engaged with the application and provide the data that is crucial to reporting. Most resources will monitor the My Work application for the tasks they are assigned. It is up to the project and resource managers to assign tasks and tickets (service requests, incidents, etc.) to the resource so that he knows what work to complete.

Tasks, Issues, Tickets, and Ticket Tasks are all items that can be assigned to a resource. Tasks and Issues are assigned from the within the Projects/Workspaces Application. Tickets are assigned within the Ticket Application. To assign Tasks and Issues to a user, follow the steps below:

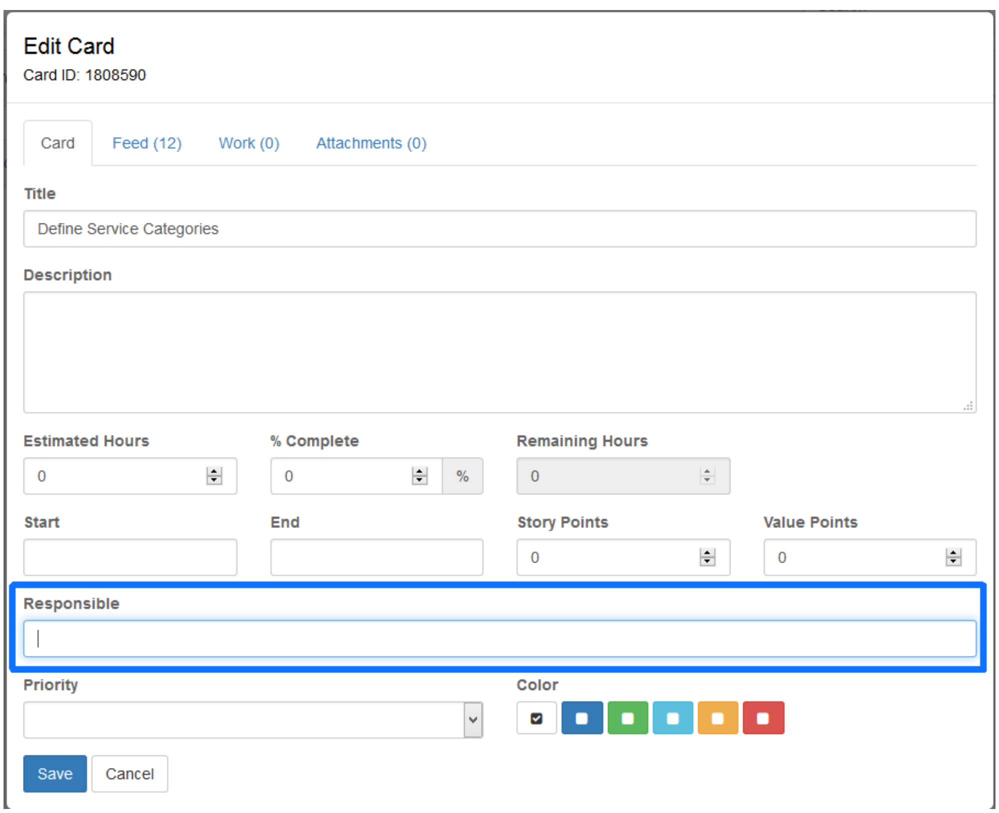
1. In TDNext, open the Projects/Workspaces Application and find the appropriate project beneath the Projects node.
2. Open the project plan by clicking on the Plans link and then click the Waterfall or Card Wall plan. If you do not already have a project plan, click the New button to create one.



3. To assign a resource to a task within a Waterfall plan, simply drag the resource from the Resources pane onto the task row within the Resources column.

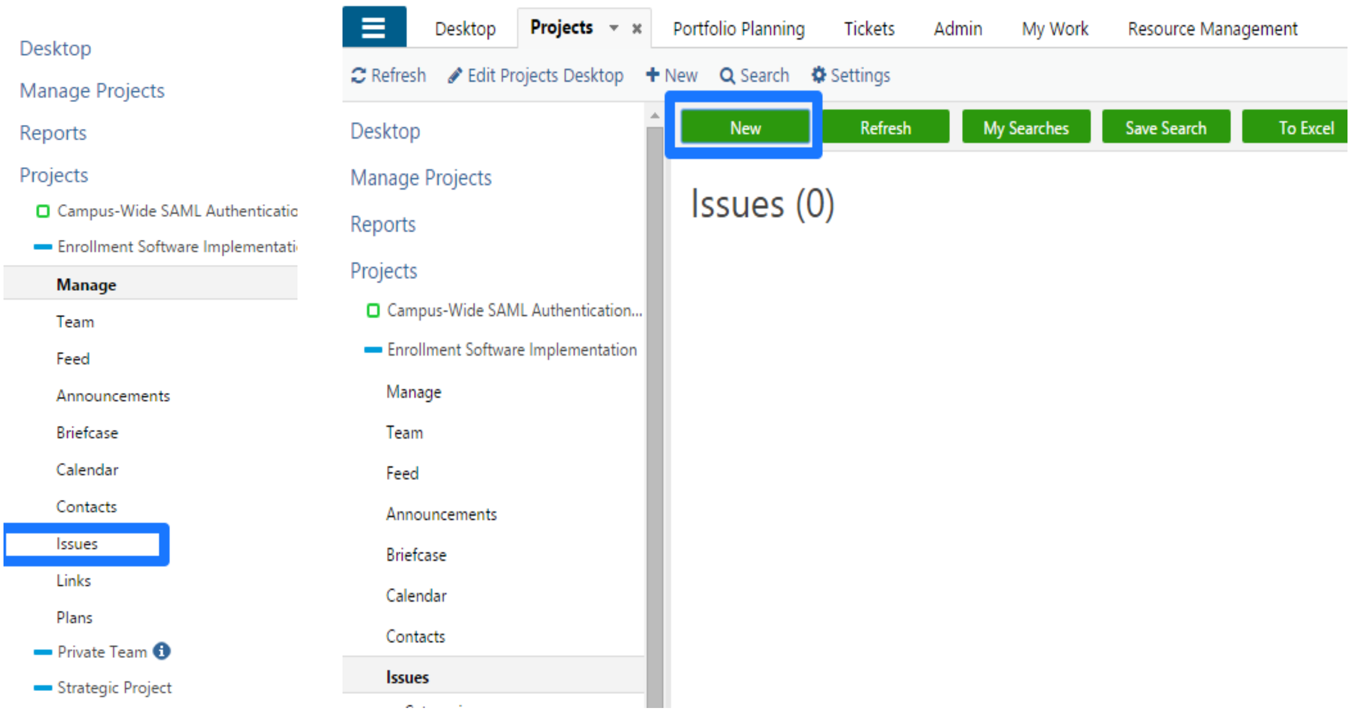


If using a Card Wall plan, edit the task and enter a resource's name in the Responsible field. Multiple resources can be added to a Card Wall task.

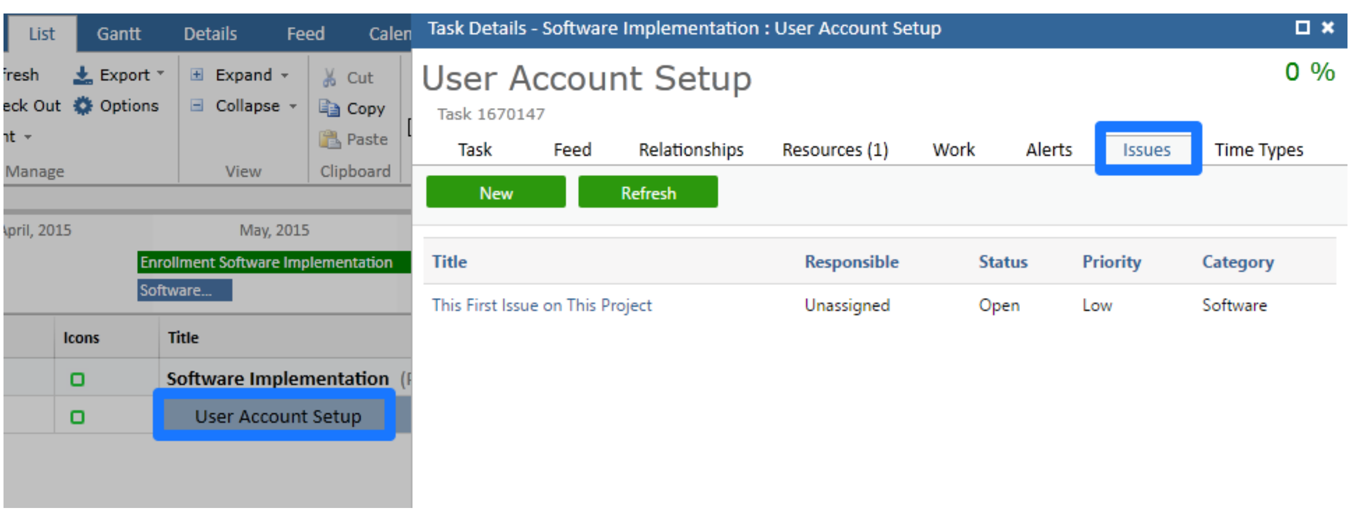


4. Once the plan is saved after assigning a resource to a task, the task will appear in the users "My Assignments" view within the My Work application.

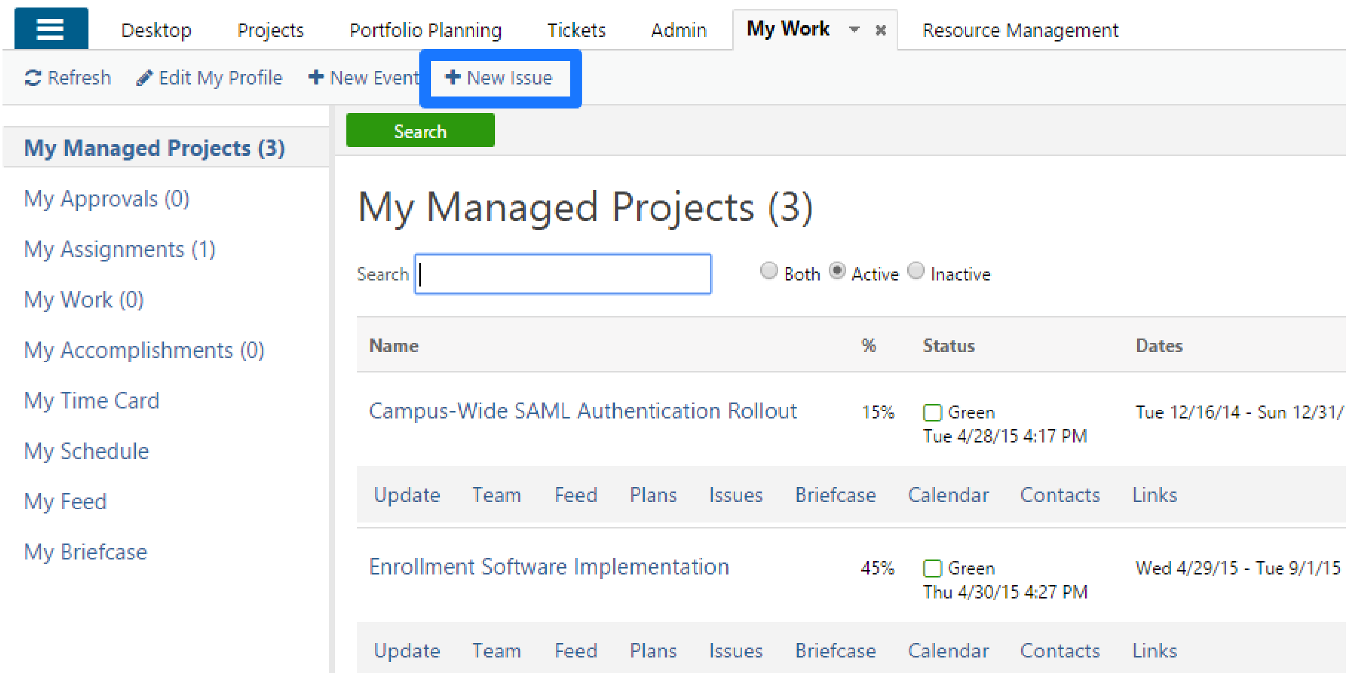
5. There are a couple options for creating issues against a project. Issues can be created from the Project folder within the Projects/Workspaces Application. Issues can also be created from within the project plan. Finally, users can create issues from the My Work application.
6. To create an issue from the Projects/Workspaces Application, expand the project folder and then expand the Issues link. Click "New" to create an issue.



7. Issues created from within the project plan are linked to a task. To create an issue from a particular project plan task, double-click the task row to open the task details. Then, click on the Issues section of the task details window.

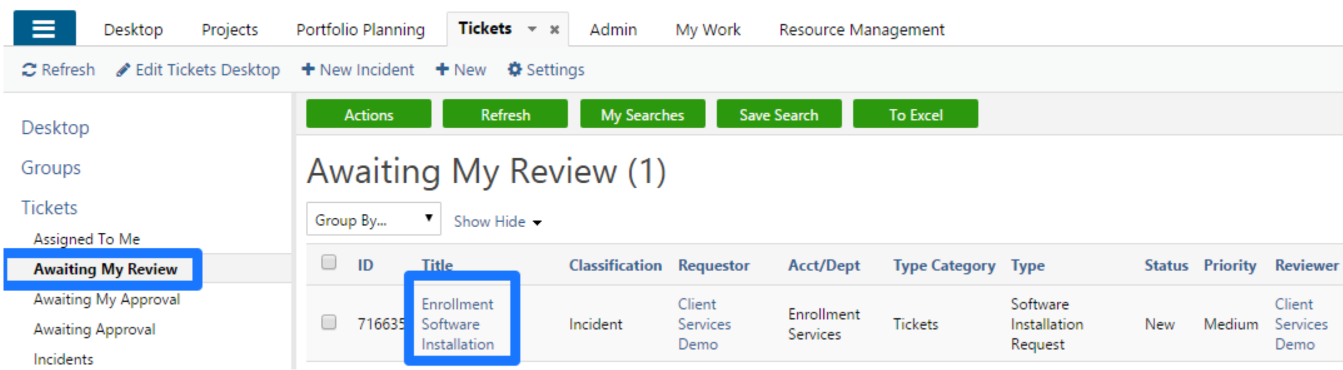


8. Any user can create an issue from the My Work application. The "New Issue" icon appears in the menu bar.

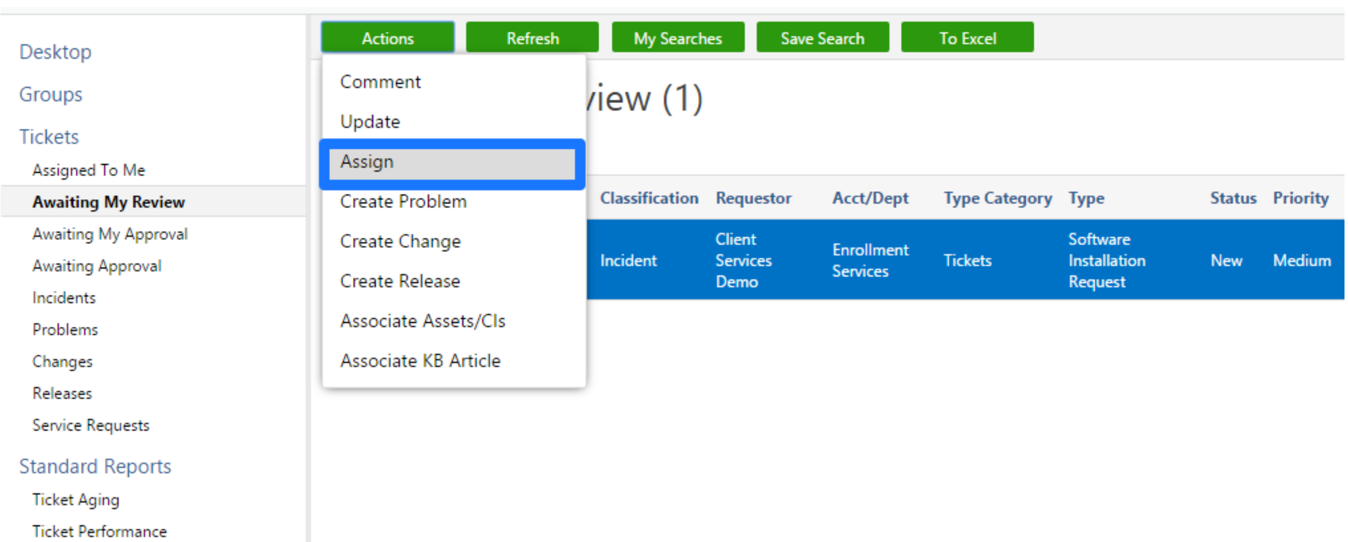


Tickets and Ticket Tasks (sub-tasks within a ticket) are also work items that can be assigned to users. Typically, when a ticket is created it will go to a group or an individual for review. If the ticket is going to a group for review, it is likely that all users are monitoring for tickets similar to a queuing scenario. Any of the users monitoring those ticket groups will likely "Take" the ticket and be responsible for its completion. If a specific individual is responsible for reviewing a specific ticket type or types, that individual is likely going to evaluate the ticket and then assign responsibility. To assign responsibility of a ticket, follow the steps below:

9. Open a ticket for which you are responsible for reviewing by clicking on the ticket name.

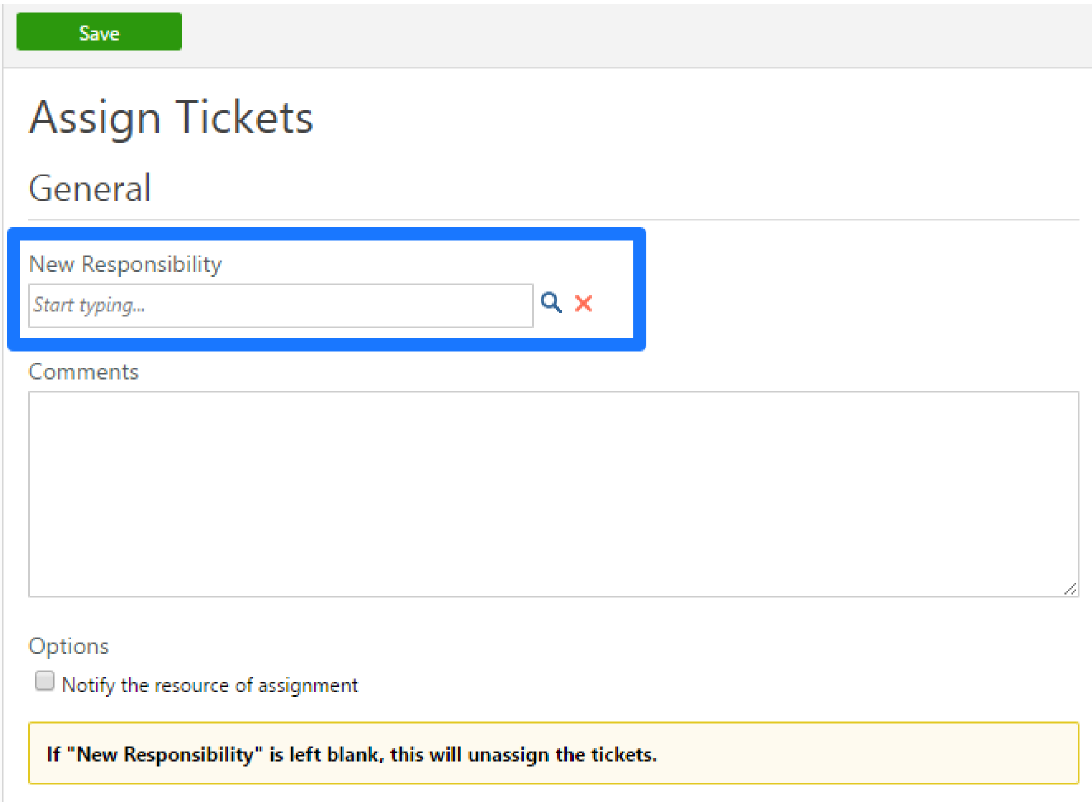


10. Click the Action button and select "Assign"



11. Browse or start typing to add an individual or group as the New Responsibility and then select "Assign Resource". Only one person or one group can be

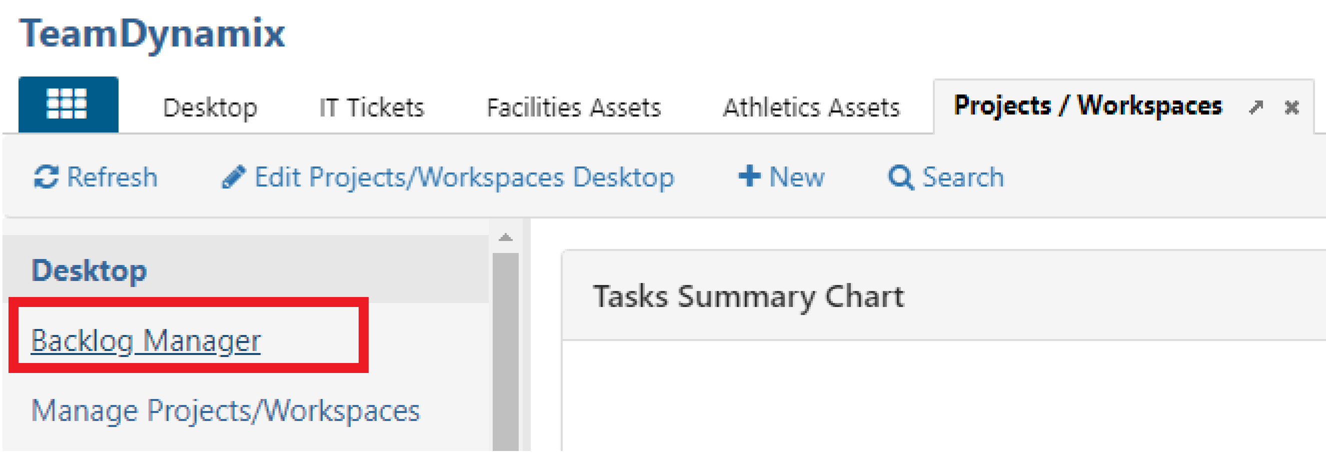
assigned responsibility of a ticket. However, you can create sub-tasks called ticket tasks on a ticket if other steps need to be completed as part of the overall ticket. Click the "Add" beneath the Tasks section of a ticket to create a new ticket task.



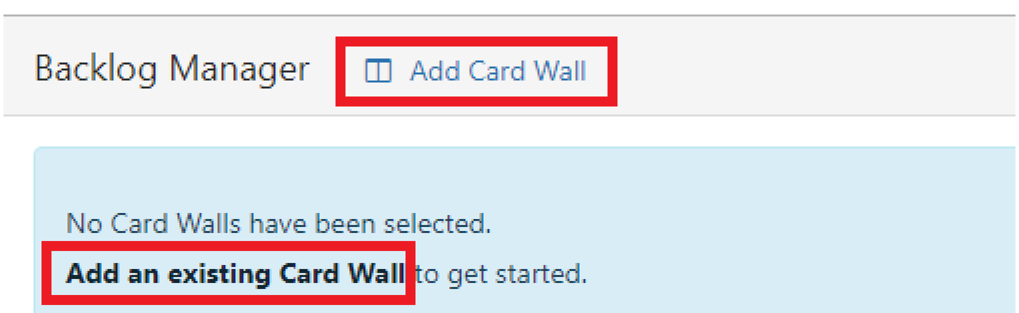
USING THE BACKLOG MANAGER

The Backlog Manager allows project managers to view their backlog in TDNext, organize it with an intuitive drag-and-drop interface within their browser, and pull groups of items from the backlog into sprints. Both the backlog and individual sprints will be represented as Card Walls on one or more projects in TeamDynamix. The Backlog Manager also allows assigning resources to cards with a drag-and-drop interface.

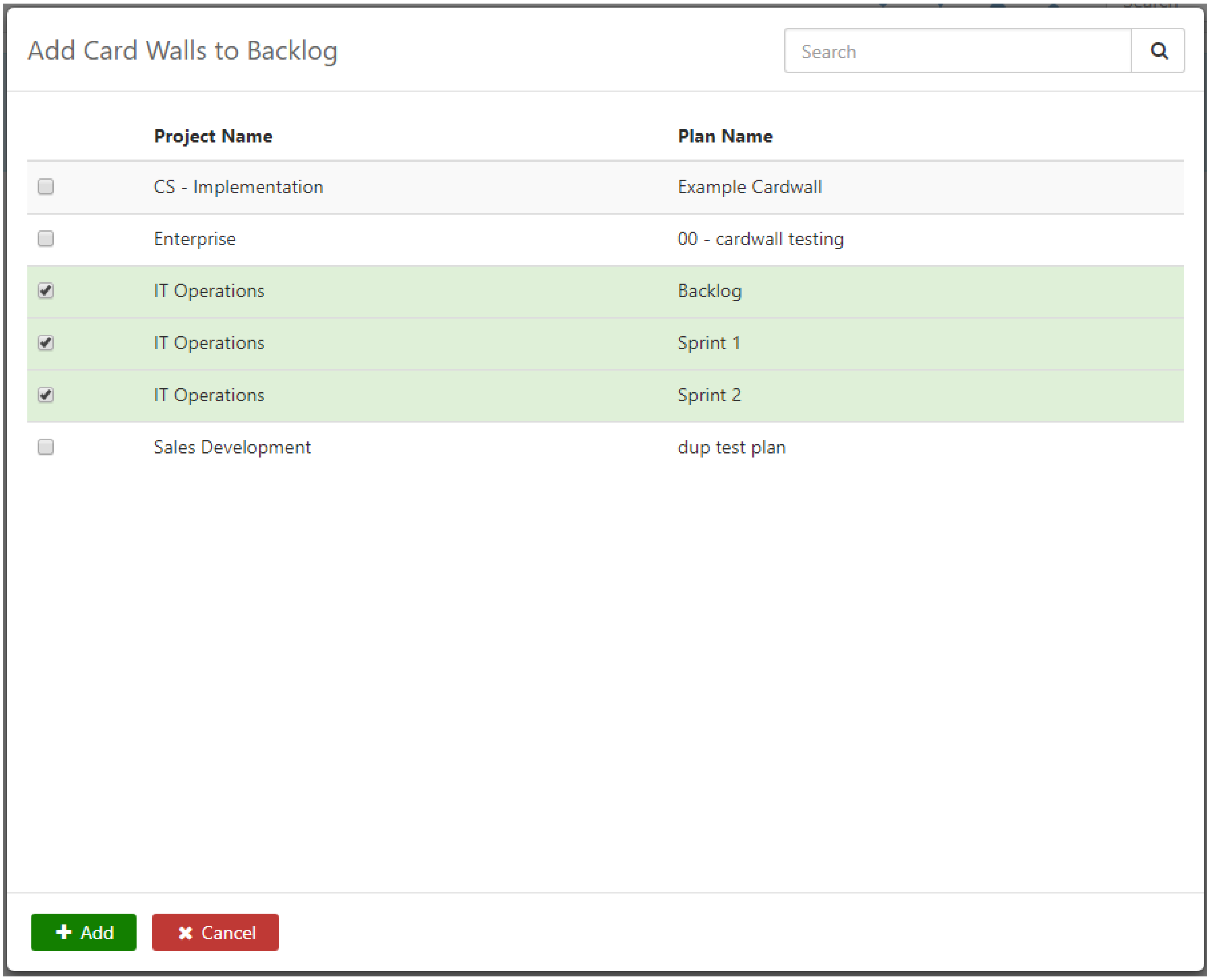
The Backlog Manager is accessed in TDNext and is available to anyone who can access the Projects/Workspaces application. Within Projects/Workspaces, click Backlog Manager in the left navigation menu to launch the Backlog Manager in a new tab.



In the Backlog Manager, click Add Card Wall or Add an existing Card Wall to open the Add Card Walls to Backlog window.

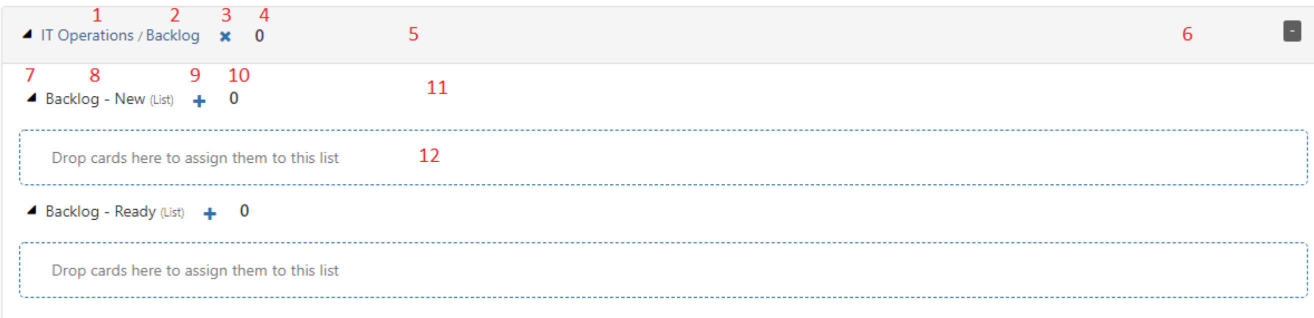


In the Add Card Walls to Backlog window, select the card walls that you want to include. You can use the Search to filter by project name or plan name. When you've selected the ones you want, click Add.



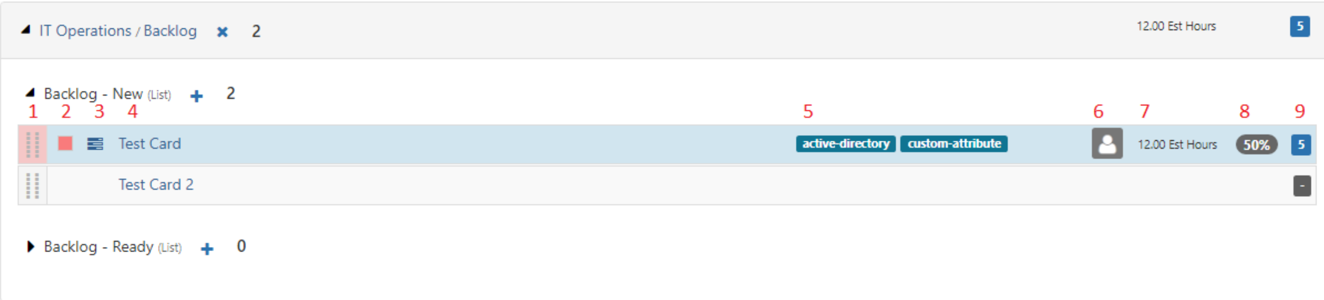
The card walls you selected will load. After you arrange the card walls in the order that you want, you can bookmark the page to automatically load that set of card walls next time you use the backlog manager.

This section describes how to work with and understand the Card Walls in the Backlog Manager. The card wall will display as shown in the screenshot below:



1. The name of the project. Click to open the project in a new tab.
2. The name of the card wall. Click to open the card wall in a new tab.
3. Click the X to remove this card wall from the Backlog Manager
4. The number of cards in this card wall
5. Click anywhere in the title bar to collapse the card wall. Drag anywhere in this area to rearrange the order of the card walls.
6. The top right will show the estimated hours and total story points for cards in this card wall.
7. Click the arrow to collapse one of the lists in the card wall.
8. The name of a list in the card wall.
9. Click the + to add a card to this list or convert a ticket to a card.
10. The number of cards in the list.
11. Click in the whitespace to drag lists and rearrange them within a card wall. A list cannot move to another card wall.
12. This area will show the cards in this list, or say "Drop cards here to assign them to this list." Cards at the top of the list in the card wall will display at the top in Backlog Manager.

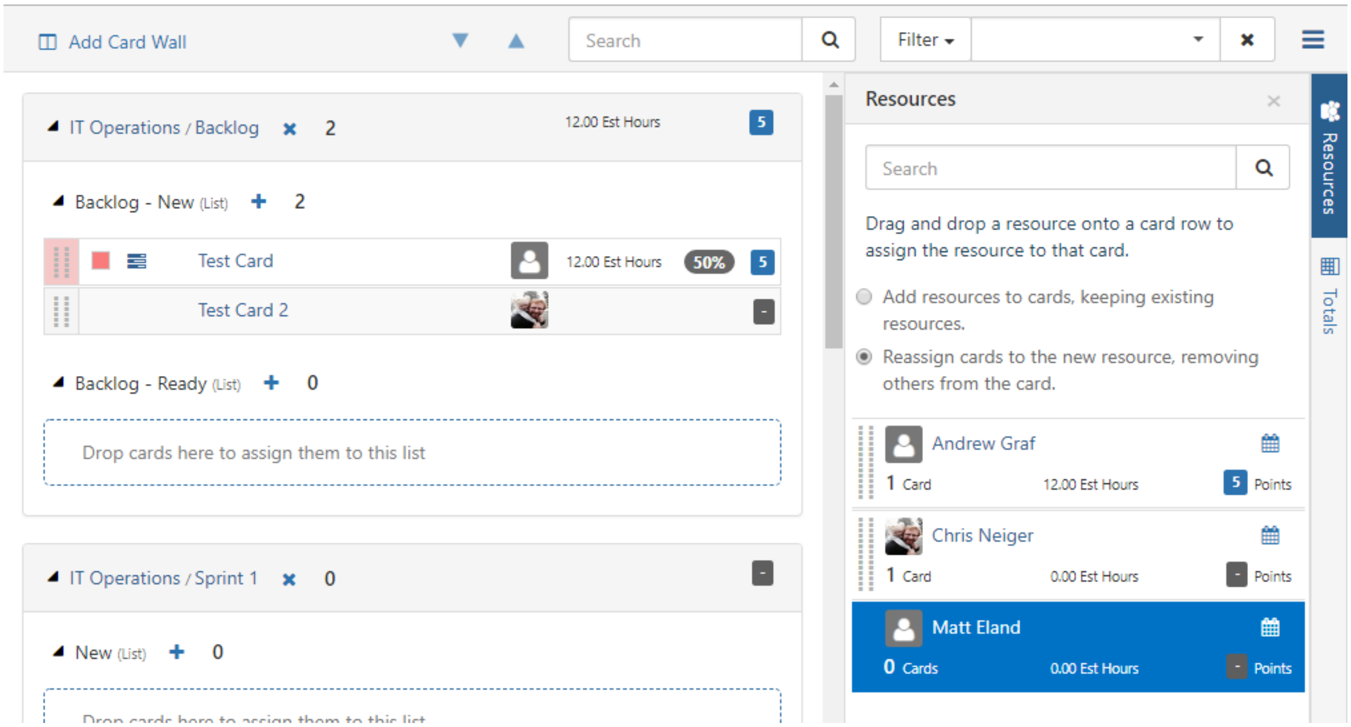
Each list in the card wall can include 0 or more cards, which will display as follows:



1. The card's Color.
2. The card's Priority
3. The Subtask indicator. Clicking this will open the card to the Subtasks tab.
4. The card's Title. Clicking this will open the card to the Details tab.
5. The card's Tags.
6. The responsible resource(s).
7. The card's estimated hours.
8. The card's Percent Complete.
9. The card's Story Points.

Cards can be moved around the backlog manager by dragging them between lists, either within the same card wall or across multiple. You can also move them using the arrow buttons at the top of the page.

The Resources Sidebar allows viewing the resources on the card walls that are open and assigning them to cards as needed. Each resource tile in the sidebar includes the resource's total assigned cards, estimated hours, and story points. Click the Calendar icon to view the resource's schedule report.



Once open, you can click on a card to highlight its resources or click on a resource to highlight their cards. You can also drag a resource tile onto a card to assign the resource, according to the assignment options at the top of the sidebar.

The Resources sidebar is also available when viewing a card wall.

The Totals sidebar summarizes the totals for each card wall in the backlog manager. This sidebar is also included in the card wall view, where it summarizes by list. The sidebar only includes cards in active lists.