TeamDynamix Team Member Handbook

1 Welcome!

Hello, and welcome to the TeamDynamix community! TeamDynamix is a tool designed specifically for higher education to help institutions manage their projects, services, assets, and more.

TeamDynamix has several types of user licenses. "Enterprise" licenses are for people who need full access to all parts of TeamDynamix including TeamDynamix configuration and advanced reporting. "Team Member" licenses are for people who will be a resource on a project teams.

This handbook is for people with Team Member licenses. It shows how people with a team member license can use TeamDynamix for project management, including how to request projects, see your requests, participate on an active project team, and even how to manage a project even with a Team Member license.

2 A brief introduction to project portfolio management

Project management, fundamentally, is the art of translating uncertainty into certainty. Every organization has its own definition of a "project," and the definition can evolve over time, but a project is typically a significant new endeavor that has some level of uncertainty to it.

The two big parts of project portfolio management are:

- Identifying which projects to pursue (Portfolio Planning application)
- Managing to completion the selected projects (Projects/Workspaces application)

These two are related: new projects can only be pursued if existing projects can be completed; existing projects will be perceived as valuable only if they were the right projects to pursue.

3 TeamDynamix fundamentals

This section is a high-level overview of the parts of TeamDynamix. Each organization can use TeamDynamix in a different way, so this section also includes pointers to help you understand what your organization has made available to you.

3.1 TeamDynamix's interfaces

TeamDynamix has four interfaces:

- **TDAdmin**: Administrative setup for TeamDynamix, used by administrators. TDAdmin is not available for Team Members so you can safely ignore this.
- **TDNext**: The application suite interface for employees, used by Team Members and any other licensed users.
- **TDClient**: Client/end-user interface, used by everyone including Team Members.
- **TDMobile**: An interface designed for devices that cannot access TDClient or TDNext. It provides basic and responsive access to some parts of TeamDynamix.

All TeamDynamix interfaces are accessed via the web. Your organization will have a domain name and URL for each of these interfaces that looks like this:

- https://[[your-td-domain]/TDNext/
- https://[[your-td-domain]/TDClient/
- https://[[your-td-domain]/TDMobile/

3.2 Logging in

Your TeamDynamix administrator will need to tell you what username and password to use to log into TeamDynamix, depending on how user records are created and how authentication has been set up.

3.2.1 User records

Everyone who logs into TeamDynamix needs a user record. Your administrator is responsible for ensuring your user record is created.

Your organization may pre-populate user records, for example via a batch job or API integration, or your organization may have "self-registration" templates that create user records using single sign-on or LDAP information.

3.2.2 Authentication (passwords)

Your organization may have turned on single sign-on. If so, when you try to log into TeamDynamix you may be redirected to your organization's login screen.

Or, your organization may have turned on LDAP-based authentication, so you log in via the TeamDynamix login screen but you use your organization's password.

Or, you may have a TeamDynamix-specific password that you need to get from your TeamDynamix administrator.

3.3   Seeing what access your administrator has granted you

Your TeamDynamix administrator can control what you have access to do in TeamDynamix in two ways:

1. Applications assigned to your user record, e.g. whether you have access to the "Projects / Workspaces" application.
2. Permissions assigned to your security role, e.g. "Edit Plans" for projects.

To see what applications you can access, try logging into TDNext[1] and clicking on the application menu. You will see a list of applications represented by icons, such as "Desktop." These are the applications you can access.
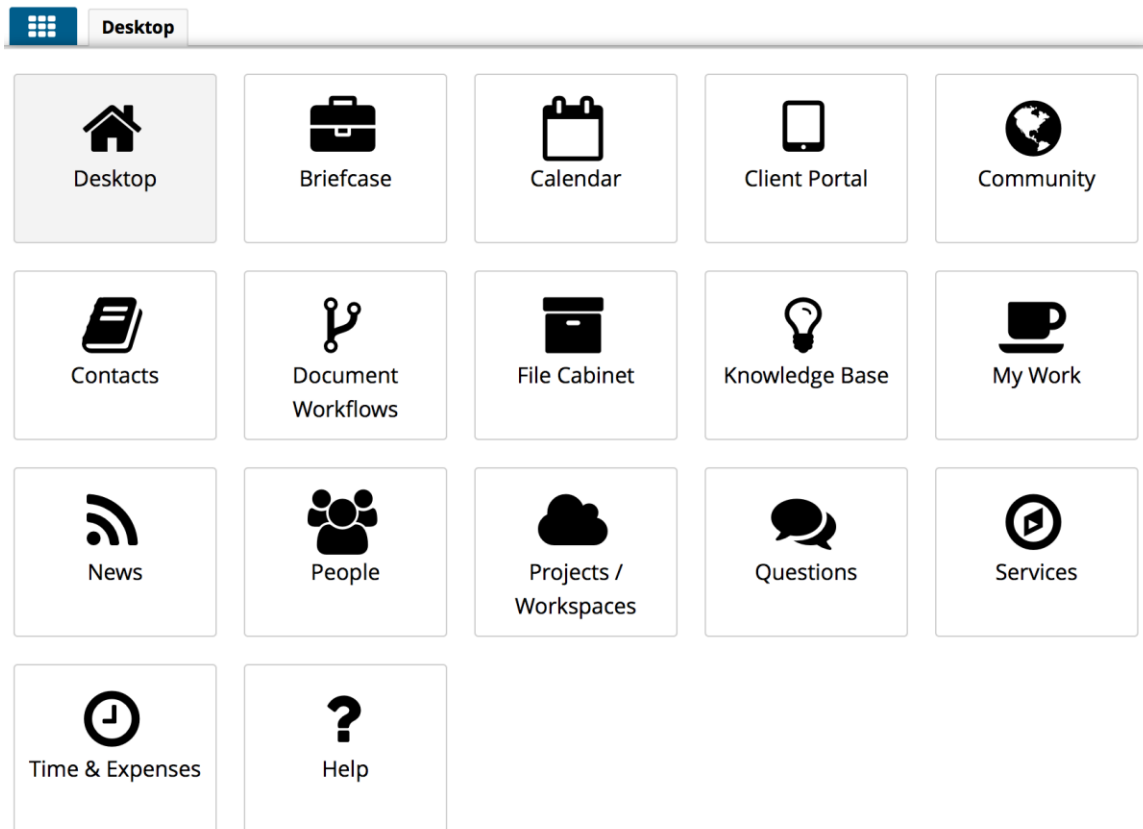
Figure 1. All applications that can be made available to a project team member. Some, such as "Services," will take you to TDClient applications.

To see the TDClient-specific applications you can access, try logging into TDClient[2]. The list of applications at the top (e.g. "Projects/Workspaces") are the TDClient

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[1] If you cannot log in to TDNext:
- Verify you have the correct URL,
- You may not have a user record in TeamDynamix,
- Your user record may not have access to the "TDNext" application, or
- Your username or password may be incorrect.

[2] If you cannot log in to TDClient:
- Verify you have the correct URL,
- You may not have a user record in TeamDynamix.

applications you can access. If logged in to TDNext, you can access TDClient by clicking "Client Portal" in the application menu.
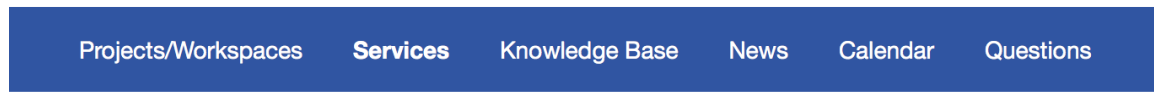
Figure 2. All TDClient applications that can be made available to a Team Member.

It is harder to know, without asking your TeamDynamix administrator, what your security role lets you do. In this handbook we will identify things you may or may not be able to do based on your security role.

Figure 3. An example of a TeamDynamix administrator's options when defining a security role. If you believe you do not have the proper permissions in an application, ask your TeamDynamix administrator.

> *If you read something in this guide that you cannot do in your TeamDynamix environment, it is possible that your security role does not allow you access. Please work with your TeamDynamix administrator to review your security role's permissions.*

3.4   Applications you may be able to see

You may or may not have access to see these applications. Remember, as described in section 3.3 your administrator can control which applications you can access as well as what you can do within each application.

Application	Brief description	See also
Community (TDNext)	Link to the TeamDynamix Community site.	Section 3.5
Desktop (TDNext)	View delivered modules and custom reports all within a dashboard like application.	Section 7.3
Knowledge Base (TDClient)	Captures internal, user-facing, or public knowledge articles.	Section 8.2
My Work (TDNext)	A collection of everything TeamDynamix that pertains to the authenticated user.	Section 6.1
People (TDNext)	The people records within TeamDynamix.	*Not covered in this handbook.*
Project Requests (TDClient)	View your Not Submitted and Submitted project requests.	Section 4.2, 4.3
Projects / Workspaces (TDNext)	Interact with Projects and/or Workspaces in which you are a resource on. Access all detail pertaining to a project.	Section 5
Projects / Workspaces (TDClient)	View and interact with projects where you are a stakeholder. Designed more for Client license and/or requestors.	Section 5.4
Questions (TDClient)	A forum like application enabling users to ask questions of other TeamDynamix users within your organization.	Section 8.1
Services (TDClient)	Review services offered and make a request for the work to be completed—for example, a new project request.	Section 4.1
Time & Expenses	Time or effort tracking as well as any expense entry for a project.	Section 6.3

This guide will cover all these applications and what you can do in each, but feel free to skip the sections that are not relevant for your organization.

3.5 How to learn more

The TeamDynamix Community site is a great way to learn more about the product. You can also download manuals, ask questions, see release notes, and watch videos, such as TeamDynamix User Conference presentations.

Here's one way to access the TeamDynamix community site:

1. When logged into TDNext
2. Select the on the "Community" button[3] in the application menu
3. You may be prompted to register, if this is your first time using Community

Once you are on the Community site, notice there are several tabs at the top, as well as a search box.
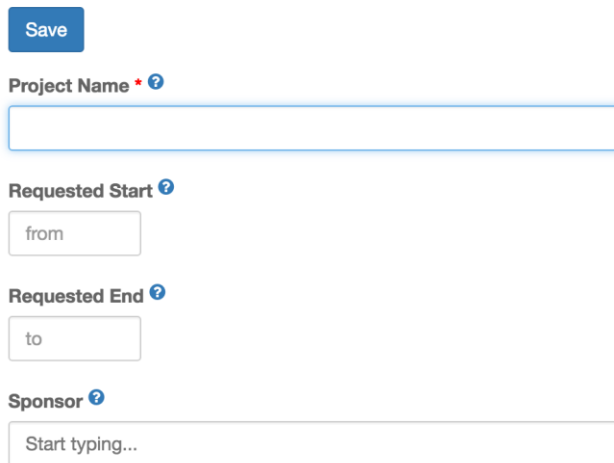
4 Identifying projects to pursue

The first part of project portfolio management is identifying which projects to pursue.

Your organization may or may not have created a way for you to request projects. If they have created a way for you to request a new project, there are two major steps:

1. Filling out the initial project request form
2. Completing the request sections and submitting it

4.1 Filling out the initial project request form

Figure 4. The beginning of the default project request form. Your environment may use a different form or set of forms. Or, your environment may not have a service configured to create a project request; your administrator must create a project request service before project requests can be submitted.

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[3] If you do not see a "Community" button, your administrator may have disabled the application. Please ask them to re-enable the button.

Do you have access to the "Services" TDClient application? (If you don't, you may want to ask your TeamDynamix administrator if you can have access to this application.)

Inside the Services application, there may be one or more service entries for requesting a new project. (These services must be created by someone with an Enterprise license and also has the permission to add services.)
The default TeamDynamix project request form asks for some general information about the project request, such as the project request name, sponsor, and description. However, the TeamDynamix administrators may have created a custom request form that asks additional questions.

4.2   Completing the request and submitting it
If you've saved a project request in the Not Submitted status and want to revisit it to complete and submit:

1. Log into TDClient
2. Click "Services"
3. Click "Project requests"

This view shows you all your project requests. Please note the "Status" column—if it says "Not Submitted," then you can click on the request name to complete the request and submit it.
When you open up your request, you will see a list of section on the left including at least "Business Case" and "Review and Submit." Your TeamDynamix administrator may have enabled other sections as well:

Note: Section name and order can be customized, it is possible that your TeamDynamix administrator has renamed or reordered a section to best suite your institution.

Section	What it Means to You
General	General project information, this will include any custom fields that are unique to your environment.
Goals	Select from a pre-defined list of goals, identifying which of those goals this project request supports.
Systems Affected	Select from a pre-defined list of systems, identifying which systems would be impacted if this project were to occur.
Related Processes	You select from a pre-defined list of processes, identifying which processes would be impacted if this project were to occur.
Risks	Are any of the listed risks relevant to this project? If so select to which degree and include comments.

Benefits	Identify any possible returns/outcomes for this project, including monetary benefits and/or a description of intangible benefits.
Files	Add any relevant files, for example vendor quotes or a project charter.
Expenses	Add any expected expenses (excluding labor) to complete this project. For example, if there will be hardware, software, or travel costs.
Returns	This section can record the financial and non-financial returns expected from a project.
Role Forecasts	Identify the skill sets and amount of estimated hours needed to achieve this project. A named human resource will not be assigned until the project request has graduated to a project.
Score Card	To accurately assess multiple project requests compare them against the same metrics, this score card. The score card will generate a score for the project request committee to utilize in prioritizing projects.
Stakeholders	Stakeholders are stakeholders for this project, along with a description of their "stake" or reason why they are a stakeholder, and whether for this project the stakeholder will be responsible, accountable, consulted, or informed[4].

Again, different organizations want to collect different types of information for project requests. Your TeamDynamix administrator decides which of these sections you can see when creating a project request.
As you fill out each section, click "Mark Complete" to indicate you are done with that section. When all sections are complete, go to "Review and Submit" and submit your project request. You must mark all sections complete to submit the request.

4.3   Reviewing your submitted requests

Once project requests have been submitted, they are managed in another part of TeamDynamix that requires an Enterprise license. However, you can still see your submitted requests:

1. Log into TDClient
2. Click "Services"
3. Click "Project Requests"

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[4] These terms come from the "RACI Matrix", which is a way of clarifying which roles need to be included at what level for an activity.

The Projects Requests page on the Client Portal shows you all your project requests. Please note the "Status" column. "Not Submitted" requests are still waiting for you to complete them (see section 4.2).
Requests in any other status have been submitted and are at some level of review.

Project request status	Meaning
Not Submitted	Still waiting on you to complete the request. Or, the request was returned to you, perhaps for more information. (See section 4.2)
Submitted	Request has been submitted, however it is not yet assigned a project request workflow for review.
Approved	Request has completed the project request workflow and is waiting for someone (not you) to graduate the request into a project.
Declined	This project request was declined i.e. it will not be moving forward.
Any other status	Your TeamDynamix administrator can configure project request workflows. The status you see here is whatever name they have given to the current workflow step.
Request is missing	You will not see a submitted project request in two cases: (1) if it was deleted by an administrator, or (2) if it has been converted into a project record (see section 5).

You can click on any request to see basic information about the request, including the sponsor and evaluator. The evaluator is the person configured in TeamDynamix to review and process the request.
The Feed is an audit trail of all activity on the project request. The Feed also supports comments to communicate with request resources. If you add a comment to the Feed, consider using the Notify box. When you check someone's name in the Notify box, the user will receive an email notification about the Feed activity. Please note that your Feed comments will be visible to everyone who has access to the project, including end users.

5   Viewing and updating projects

There are many ways to use TeamDynamix to show and manage projects. There are even two different, closely related applications to see project information:

- "Projects/Workspaces" in TDNext (designed primarily for project resources), and
- "Projects/Workspaces" in TDClient (designed primarily for Client users).

5.1   Project-specific roles

Users can have several roles on a project:

- Project manager: Users with Team Member licenses can be listed as a project manager for a project. *You do not need the TeamDynamix Project Manager or Enterprise license to be listed as project manager for a project.*
- Resource: People on the project team to be assigned tasks/activities.
- Sponsor: The person authorizing this work.
- Stakeholder: Other people who have been identified as a stakeholder, possibly including whether they are responsible, accountable, consulted, or informed, and a description of their stake in the project.
- Contact: A contract record important to track within the project, yet not a resource on the project.

5.2   Accessing projects in TDNext

To access projects in TDNext:

1. Log in to TDNext.
2. Open the "Projects/Workspaces" application.
3. Notice the list of projects on the left, as well as the search bar on the left.

Note: You will only see projects if the project is open, active[5], and you are a resource or stakeholder on the project.

You can then click on the project name to expand it and see its components.

You may be able to see additional projects using the TDClient interface, if those projects are configured to be visible to all logged-in users or to be publicly visible (see section 5.4).

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[5] The project manager for a project can make a project active or inactive by going to the "manage" component and choosing "activate" or "deactivate" under the "actions" button.

5.3   Project components in TeamDynamix

Your project managers and TeamDynamix administrators choose which of the possible TeamDynamix project components to use for each project. Different projects may use different project components[6].

Project Component	Description
"Details" or "Manage" summary information	Information about the overall project. Items such as, start date, end date, project health, project manager, etc..
Team	List of people on the project team.
Feed	An audit trail of all activity that occurs on the project. This includes, status updates, resource assignments, comments, completing tasks, etc…
Announcements	Announcements to the project team, stakeholders, or contacts.
Briefcase	Files repository of files related to the project, organized into folders.
Calendar	A project calendar, which includes options to show time off, task dates, and other information that impacts the project.
Contacts	People associated with this project. Automatically includes any listed project resources and project stakeholders.
Issues	Ad-hoc or emergent issues related to the project.
Links	Arbitrary URIs/web links that pertain to the project, e.g. http://www.example.com.
Plans	Where project plans are created, viewed, and managed.

5.3.1   "Details" or "Manage" summary information

When in the Projects/Workspaces application each project you're a resource on will appear in the left navigation. To view/interact with the project, expand the options by selecting the project. If you are listed as the project manager or alternate project manager, the top component will be called "Manage." Otherwise, it will be called "Details."

When a project request is converted into a project, the information from the project request is shown here. This component can show many "project sections," including sections that were not collected during the project request or project review stages. All project sections are described more fully in section 4.2.

The project manager can update any of this summary information.

Here are the most important project sections for the average active project:

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[6] The project manager for a project can turn components off or on by going to the "manage" component, to the "components" section, and then selecting or deselecting components.

- Project Details section
  - Shows the latest project update and the project's start and end dates.
  - You can review all updates or report on the latest status update. It is also helpful to view the Status Chart section of the project.
  - "Actions" button, only available for the project manager:
    - activate or deactivate the project,
    - close the project, which can include sending a project survey,
    - apply a project template,
    - add a project-level baseline, or
    - copy the project into a new project.
- General
  - A project manager can change the project start and end date, name, description, or other project settings. The settings have contextual help to explain what the settings do.
  - All custom attributes will show within this section. If any Attribute Sections have been configured these will appear in the navigation.
- Resources
  - Shows the project team.
  - **"Actions" button > "Add resource"**, visible only for the project's project managers, let you add people to the resource list.
  - **"Actions" button > "Change manager"**, visible only for the primary project manager, let you change the primary and alternate project managers.

5.3.2 Team

The "Team" component shows each project resource and what they're working on within TeamDynamix.
If you click on a person, you will see:

- **Feed:** shows all their updates across all parts of TeamDynamix, e.g. when they have closed a task.
- **Working on** and **Assignments**: comes from what has been assigned to this person, and what they have told TeamDynamix they are working on in the "My Work" application.
- **Accomplishments**: lists their completed tasks, tickets, and issues.

5.3.3 Feed

The project feed is a chronological account of all activity on the project. You can see and filter project updates, messages, and other changes. You can filter the feed by checking/unchecking the types of feed entries you want to see and clicking "Refresh."
You can add new comments to a project's feed. If you add a comment to a feed, consider using the "Notify" box. When you check someone's name in the Notify box, TeamDynamix will email them a notification that you have left a comment on the feed.

5.3.4   Announcements

You can see or create project announcements, which can then be emailed to project contacts and will be visible in TDClient. To notify project resources and stakeholders about the announcement, check the "Notify Users" checkbox. Announcements can have expiration dates.

5.3.5   Briefcase

The briefcase is a file repository used to record documents related to the project. Your organization can turn on integrations with other file-sharing services such as Google Drive or Box. If you find yourself collecting or sharing files related to a project, consider sharing them via the briefcase so that they will be accessible later to all project resources.

5.3.6   Calendar

This calendar can summarize project timelines and dates of task assignments. If you want a personal view of tasks and issues that are specific for you, please consider the "My Work" application instead.

5.3.7   Contacts

If you find yourself emailing people about the project, consider adding them as a contact to the project and then contacting them via the project feed. That way other people will see your correspondence as well and all communication pertaining to the project is captured within the project itself.

5.3.8   Issues

Issues that arise once the project is in flight are worth documenting. Once an issue is created, it can be given a status, responsibility, and completion date. Issues will show as an item of work for the responsible, additionally time can be recorded on an issue.

5.3.9   Links

If your team chooses, you can record relevant links here for quick access, e.g. to a vendor's documentation or an institution's website.

5.3.10 Plans

Plans can be very complicated. One project can have many plans, although most projects only have one plan.
Plans can be of two types:

1. Waterfall
2. Card Wall

Only Project Manager or Enterprise licenses can add a plan to a project. However, once a plan is created, project resources (with necessary permissions) can add or modify tasks within existing plans.

5.3.10.1 Waterfall Plans

Waterfall plans can be very detailed. You probably will need a different license if you manage a waterfall plan, as TeamDynamix's project team member license does not let you delete waterfall plan tasks.

Waterfall plans allow you to set dependencies, time estimates, milestones, and other detailed project scheduling. Waterfall plans will be familiar to people comfortable with Gantt charts or tools such as MS Project.

Waterfall plans must be "checked out" in order to be changed. However, even without checking out a plan you can open tasks via the plan and update or complete these tasks. Also, tasks where you are listed as responsible will show up in "My Work" (see section 6.1).

5.3.10.2 Card Wall Plans

Card Wall plans are less detailed, but easier to use: work starts in one list, say "not started," and moves to other lists, such as "in progress" or "done." You can edit existing or create new swim-lanes/lists and you can track many attributes on card wall tasks. Once a card wall plan is created, project Team Member licenses have full access to update the card wall.

You can easily create cards for work. Then, you can open those cards to record information about the work, such as the responsible party and a description of the work.

Card walls are a very simple way to track project work. If your organization does not use TeamDynamix plans, you can still ask someone to create a card wall plan so that you can track your work on a project.

5.4   TDClient to view or update projects

The TDClient Projects/Workspaces application is designed primarily for end users. Using TDClient is a great way to see what end users see. Note, for example, that users can see project feed posts. TDClient shares lots of information about projects. To access projects in TDClient,

1. Log into TDClient
2. Click "Projects/Workspaces" in the navigation
3. A list of all projects viewable to you will appear

5.4.1 When users will (or won't) see a project record in TDClient

TDClient's "Projects/Workspaces" application have a project visible to a client in these cases:

- Their TeamDynamix user record has the "Projects/Workspaces" application AND
- The project is "active" AND
    - You are listed on the project (as a resource, stakeholder, or contact) OR
    - The project settings (under "General"), for "Client Portal Visibility", are set to make the project visible to all users.

If you cannot see a project record in TDClient, check with the project manager to confirm that the project is active and that you are listed as the proper role on the on the project.

5.4.2 TDClient project components

The below project components can show up if they are enabled for the project. (See also section 5.3)

Component	About
Details	This shows portions of the project details, similar to section 5.3.1.
Feed	This shows the project feed and lets users add new comments, similar to section 5.3.3.
Announcements	This shows any active project announcements and lets users add new announcements, similar to section 5.3.4.
Briefcase	This shows project files and lets users add new folders and files, similar to section 5.3.5. *Note: you can add security to a briefcase folder to make it more or less visible.*
Calendar	This shows selected project and other date-driven information, similar to section 5.3.6. Please note the gear icon, which lets you select information to show on the calendar.
Contacts	This shows all project team members, stakeholders, and other contacts, similar to section 5.3.7. You can also add contacts to the project.
Issues	This shows project issues and lets users create new issues, similar to section 5.3.8.
Links	This shows project URL/web links and lets you add links, similar to section 5.3.9.
Plans	This lets people see a read-only version of the project's plans. Both waterfall and card wall plans are able to be viewed.

5.5 Typical work on a project

5.5.1 For the project team
If you are on a project team, typically in TeamDynamix you may be:

- Adding or updating files in the project briefcase (see section 5.3.5).
- Adding or updating any project issues (see section 5.3.8).
- Updating and completing any project tasks created in project plans (see section 5.3.10).
- Adding other comments to the project (see the Feed, section 5.3.3).

Because you may be working on many projects, the "My Work" application was created to let you see your tasks and issues across all items of work in TeamDynamix. "My Work" can be a helpful way to quickly see and update your work across all projects, and is described in section 6.1.

5.5.2 For the project's project manager
If you are a project manager, you probably have the above project team member work and also other project updates/reviews:

- Providing project status updates.
- Reviewing the project start and end dates and other details as needed by your organization's project management process.
- Closing the project.
- Creating project announcements (see section 5.3.4).
- Reviewing and updating the project's issues (see section 5.3.8).
- Reviewing and updating the project's plans (see section 5.3.10).

6 My Work, Workspaces, and tracking time
The "Projects/Workspaces" application lets you look at work project-by-project. However, many times you are doing work on several different projects at once. "My Work" provides a centralized view of all your tasks and issues across projects.
Also, in a typical organization, project work is only a portion of your time. Some organizations want to track other work that is not captured within a project. The scheduled and actual time for this can be managed in Workspaces.
Some organizations track people's time for status reports or other purposes. TeamDynamix has a "Time & Expenses" application to track effort on projects and workspaces.

6.1 My Work

The "My Work" application displays all assignments pertaining to you, all in one place.

My Managed Projects 1
My Approvals 1
My Assignments 1
My Work 1
My Accomplishments 0
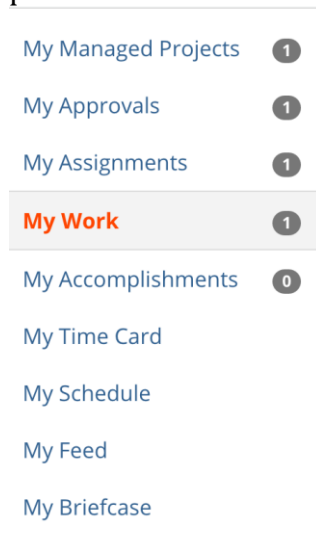My Time Card
My Schedule
My Feed
My Briefcase

Figure 5. Sections in "My Work." Note that the numbers by each section, which show how many records there are in each section, may not change until you hit the "Refresh" button.

To access "My Work,"

1. Log in to TDNext
2. Select "My Work" from the application menu

"My Work" has several sections:

My Managed Projects	If you are if you a project manager of an active project, you will see that project in this list. Clicking on the project lets you review the project's sections and provide status updates. There are also quick links to other project components.
My Approvals	Approvals for, resource requests, time reports, project requests, and service requests. Dependent on the role played at the institution varying approvals will rely on you.
My Assignments	Whenever someone puts your name on a task or other unit of work in TeamDynamix, that work will show up in "My Assignments." In some circumstances, other people can see this list, for example if they click on your name in a project's "Team" component. (See section 5.3.2)

My Work	Things only show up here if you have explicitly indicated that you are working on them by clicking "Add to My Work" from within the My Assignments section. You can also send work back to "My Assignments" if necessary. You have 100% control over what shows up under your own "My Work."
My Accomplishments	Tasks you have completed show up here.
My Time Card	This is another way to access your time card, rather than using the "Time & Expenses" application. (See section 6.3)
My Schedule	View the hours are you scheduled for on a project or workspace. For example, if there is a project beginning next month and you have been allocated 30 hours on that project, you would see that allocation in "My Schedule."
My Feed	This shows activity across all projects you a resource on.
My Briefcase	This shows all project and workspace briefcases that you can access.

6.2   Workspaces

Workspaces, part of the "Projects/Workspaces" TeamDynamix application, can serve multiple purposes. A workspace is very similar to a project in that it has many of the components of a project, including the feed, resources, announcements, briefcase, and calendar. However a key difference is that workspaces do not have plans. The workspace can be used as a collaborative place for resource teams to discuss, share files, track work, etc.

A very common use of workspaces is for scheduling time and tracking actual time. It is understood that any user is not fully allocated to only project time. Therefore to honestly represent the user's availability a workspace is used to "hold time" for the recurring or administrative work not found within a project. For instance there are likely non-project related meetings and other responsibilities that demand your time. This time is what is scheduled to you on a workspace. You can be a member of multiple workspaces and create a new workspace, if you have the necessary permissions.

Once a workspace has been created and workspace members have been added, users with a Team Member license can use a workspace few ways:

- To record time off
- To record non-project time, if your organization tracks time
- To track non-project files, using the briefcase
- To track non-project issues (although TeamDynamix "Tickets" application provides much more in-depth ticket tracking)

6.3   Tracking time

The "Time & Expenses" application will let you record project time, workspace time, issue time, and time off. It is strongly encouraged to use "My Work" and recording your time on tasks and issues as you work. When you update a task in "My Work" there is an option to add hours worked. Those hours will then be recorded on your timecard.

To access Time & Expenses:

1.   Log in to TDNext
2.   Select the "Time & Expenses" from the application menu

The time you record can go through an approval process, and the time can roll up to the project record to show total time spent on the project. Users can also have costs associated with their time (via the user record), and the project will then show the expenses for the time spent on the project. Users with the "Analysis" application can run a Scheduled v. Actuals report to learn how to improve estimates of resource scheduling.

6.3.1 Adding work time via Time & Expenses

When you select the application, you will be taken to the "Time Entry" screen. Here you can navigate week-by-week, see what time has been recorded, and add time. Please select the week you want to record time. You can then add time by clicking the "+" button under a listed project or workspace, or by clicking the "Add Time" button.

In the "Add Time Entry" dialog box you must select if this is Project/Workspace, Issue, or Time Off time. Once you have selected the proper entity to record the time on a time type (a descriptor of the kind of work accomplished) is required.

Depending on how your environment is configured, you may be able to record time for a project, or only for tasks on that project. Your environment may have several time types for different sorts of work, such as Meetings, Testing, or Administrative. Please review your organization's time-tracking process for what time types to use. *Note: If a project or workspace does not have any time types, time cannot be recorded on it.*

6.3.2 Adding leave/time off

TeamDynamix administrators can denote organization-wide holidays[7]. However, your organization may also want to see in TeamDynamix your time off.

To record time off, your TeamDynamix administrator must have set up a place to record leave. They need to create one or more time types coded as a "Time Off Type[8]," a place to record time off (likely will be a workspace), and then associate the time types with the workspace/project for recording time off

Once all that has been set up, adding time off is relatively easy:

1. Log in to TDNext
2. Go to the "Time & Expenses" application
3. By default, you should be taken to the "Time Entry" section
4. Navigate to the week that you will be entering time off.
5. Click "Add Time"
6. Click "Time Off"
7. Select the workspace your administrator set up along with the appropriate time type
8. Record the number of hours you are taking that day. Please note: your administrator defines your daily capacity —if you are taking a full day of leave, please make sure you record however many hours your administrator has defined. (The default TeamDynamix daily capacity is 8 hours per day.)

6.3.3 Finalizing your timecard

If your organization tracks time, you will need to finalize your timecard at the end of each week. To do this, go to the Time & Expenses application, to Time Entry, to the week to finalize. Then click "Submit as Final."

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[7] Under Admin > Days Off
[8] Admin > Accounts > Time accounts

Depending on your organization's processes, your time may then go to a review. You can still see the time via the "Time Entry" section for that week or under the "Submitted Time" section. Once time has been submitted as final you are unable to modify the time, unless the reviewer rejects the time entry.

7 Reporting and Desktops

TeamDynamix provides ad-hoc reporting and ways to pull together different reports and information into "Desktops."

7.1 Creating Reports

Many TDNext applications have a way to create reports. For project team members, most likely you would create reports under "Projects/Workspaces." To create a report:

1. Log in to TDNext
2. Select the "Projects/Workspaces" application
3. Click the "New" button and select "Report"

In Projects/Workspaces, you can create reports for each of the following types of data:

Data type	Example
Project Reports	Reports with one row per project
Issue Reports	Reports with one row per project/workspace issue
Survey Response Reports	Reports with one row per project survey response (Surveys can be sent out when a project is closed)
Tasks Reports	Reports with one row per project task

Once you select the data type, you will be taken to the report editing screen, which has several sections:

- Name
- Description
- Report columns
- Filtering
- Ordering
- Maximum rows
- Visibility
- Chart
- "Desktop delivery" (how this report is seen when added into a Desktop)
- Email delivery

7.1.1 Name

The name that will show up in lists of reports.
Note: if you make this report visible to others, the name will be the main way they know what the report is.

7.1.2 Description

Optionally, describe your report including its purpose or assumptions.

7.1.3 Report columns

Select the columns to see in your report. You can add, remove, and rearrange columns.
The blue "Help" button will provide a description of each column and what it means. Notably, there are a few special types of columns:

- "Count" columns, e.g. "Issue Count." If you include a "Count" column, TeamDynamix will look at the other columns you have selected and return unique values along with a count. For example if you select only two columns, "Project Type" and "Project Count," you will see each type of project type in use along with how many projects use that type.
- Columns you can "Aggregate", where a drop-down shows up in the "Aggregate" column. These let you summarize data, for example to show the maximum or minimum values.
- Date-based columns, e.g. "Project Created." You can change the "Display Format" roll these up to different levels of detail, such as only the year or the year and month.

7.1.4 Filters

Choose what data to include in your report.
By default, all filters behave in an AND relationship, i.e. results are only rows that match all filters. Select the column, the operator (e.g. "is one of" or "is not one of"), and the value.
If you select the "Prompt" checkbox, then anyone running the report will be prompted for what values to filter on. Selecting the "Prompt" checkbox will display the "Required" checkbox, so you can specify whether the field must be filled out. If you want the field to be required you must also specify a default by choosing a value from the "Value(s)" column.
Note: you almost always want to add a filter for Project Status is "Active."
If you want to do more advanced filtering:

1. Add all the filters you want to use
2. Click "Show Advanced"
3. Note the filter number for each filter you created, e.g. "1", "2", "3"

4. Type in your combined filter in the box using the numbers, OR, AND, and parentheses. For example, "1 OR (2 AND 3)" would return results where filter 1 is true or where both filter 2 and 3 are true.

7.1.5 Ordering
This section lets you choose the order that rows will be displayed. Records will be showed in order by the first value, and then when records are tied the second value will be used. For example, if you order by status and then by modified date, you will see all records sorted by their status and then within each status you will see them ordered by modified date.

7.1.6 Maximum rows
By default, TeamDynamix will limit the maximum number of records returned on a report. If you want more or fewer rows returned, change the number.
Note: Increasing this value may make your report take longer to run.

7.1.7 Visibility
By default, reports are visible only to you. However, you can make your report visible to other groups by selecting the "Me and people in this groups" option. If a group of users that you need does not exist, speak with your TeamDynamix administrator to have it created.

7.1.8 Chart
Here's where you can add a visualization, such as a bar chart or a pie chart. Understanding the special columns such as "Project Count," as described in section 7.1.3, will help greatly. Typically you will want to see aggregate data in a chart, such as the number of projects by project manager. In this case, your chart would show "Project Manager" as the "Name" and "Project Count" as the value.

7.1.9 Desktop delivery
Desktop delivery means how this report is seen when pulled into a desktop. Desktops (described in section 7.3) can show information across several applications and reports. Here you can choose how this report is viewed in a Desktop application. You can choose between a chart view (if you added one) or the grid view of your report.

7.1.10 Email delivery
Email delivery for TeamDynamix reports is very powerful. You can define daily, weekly, or monthly reports be emailed. Further, you can choose the format (e.g. Excel, PDF, etc..) and who should receive the report. Any TeamDynamix user, including Client licensed users, can receive reports via email delivery. Only TeamDynamix users can receive reports via email delivery.

7.2   Running reports

Once a report has been created, you can find it in the application where it was created under the "Reports" section in the left navagation. You will only see reports that you have create or have been shared with you (see section 7.1.7).
After you select the report, you have several options:

- **Run**: The run button will run the report. If there are report prompts, you can change their values and click "Run" to see the updated report.
- **Actions**
  - **Export to Excel**
  - **Show Details**: If you are the report owner, you can delete the report here. You can also change the report owner.
  - **Print**: An HTML, printable version of the report.
  - **Copy**: Create a new report from this report. Useful when you do not own the report you're viewing and you want your own version so you can modify the report.
- **Change page size**: TeamDynamix will paginate your report by whatever the value is here, e.g. if you say page size "30" then you will see 30 results plus a "next" button to see the next set of results in the report.

7.3   Desktops

There are two types of desktops within TDNext:

1. Desktops defined in the Desktops application,
2. Application-specific desktops, many but not all applications have their own desktop, such as the desktop for Projects/Workspaces application"

The Desktops application lets you create multiple desktops, one of which will be the default desktop displayed when you open the application.
Other applications can have exactly one desktop, additionally an application's desktop can only show data specific to that application.

7.3.1 Creating or editing a desktop

To create a desktop, either

- Go to your Desktop application (TDNext > Desktop) and click "New Desktop", or
- Go to the specific TDNext application such as Projects/Workspaces application, select "Desktop", and then click "Edit Projects/Workspaces Desktop." You can only have one application-specific desktop per application.

In the Desktop application, if you want to edit an existing desktop, click the gear in the top right corner to go to "Manage Desktops," and choose the desktop you want to edit.

7.3.2 Changing desktop content

Once you have opened the desktop to edit it, you will see two tabs, "Details" and "Content."

Under the "Content" tab, note the "Edit Layout" button. Here you can change how many columns to see in your desktop, and where the columns should be.

In the "Content" tab you can also add "Available content" into columns. Available content includes built-in content, such as a chart of your project issues, as well as reports that have been made visible to the desktop module.

7.3.3 Switching between desktops

In the "Desktop" application you can create many desktops. You can switch desktops by choosing the desktop name in the drop-down box.

To change your default desktop:

1. Click the gear to go to "Manage Desktops",
2. Click the name of the desktop that you want to make default,
3. Go to the "Details" tab
4. Click the "Set as default" button.

8 Other applications

8.1 Questions

Your administrator may have given you access to the TDClient Questions application. Questions is designed for TeamDynamix users to help other TeamDynamix users. If you have access to Questions, you can ask or answer questions. For example, if on a project you do not know how to get a contractor access to your environment, you could post a question. Anyone else using Questions could then answer that question. Questions are very much like an open forum and are intended to be ways for people to help one another learn.

8.2 Knowledge Base

Your administrator may have given you access to the TDClient Knowledge Base application. A Knowledge Base's goal is to ensure that the knowledge that is being

distributed to employees is accurate, reliable, and trustworthy. Improving the quality of information prepares employees to make effective decisions, and the end result is a more efficient team. Providing corrections and improvements to the Knowledge Base helps improve the work process and internal knowledge. Knowledge Base is different from Questions (section 8.1) in that Questions' question and answers can be asked by any user, only people with a license beyond the client license can create entries in the Knowledge Base. Entries in the Knowledge Base require review and approval by an editor before being published.

9   Use cases

This section describes ways to use TeamDynamix to help you and your team work more effectively. The previous sections describe the team member components of TeamDynamix; this section describes common ways to put together those components to make your life easier.

9.1   Move work from email into TeamDynamix

Email is in many ways the tool of last resort. When there isn't a defined process, people will often email one another to delegate work, ask for status updates, and otherwise figure out who's doing what.

Because so many processes use email, it's virtually impossible to eliminate email entirely. However, you can look at ways that email are used and move that work, process by process, into other tools that may be better equipped to track and follow up on that work.

TeamDynamix has many sections that can track processes and work better than you could with email. Here are some example types of emails and ways that the same information could be shared in TeamDynamix.

Email	TeamDynamix equivalent
Weekly project email to project team	Project status update, with optional notifications to all project contacts or the project team.
Urgent issue with a project, e.g. a stakeholder just announced they are retiring	Project issue assigned to the project manager. (See section 5.3.8)
Question about when a project is going to be complete	Ideally, the person asking this question would check TeamDynamix's project record for the most up-to-date information. However, if the person asking the question emails, the person receiving the email could log the question as an issue on the project, and then update and close the issue so that others could see it. (See section 5.3.8)
Copy of vendor scope of work document	Instead, add the file to the project briefcase. (See section 5.3.5)

Project manager asking for project team member updates	Project manager goes to the task(s) in question and adds an update for the project team member. Access tasks via plans. (See section 5.3.10)
Email asking for all active projects	Consider creating a project report with scheduled email delivery once a week. (See section 7.1.10)

Please note: many of these can generate email notifications. One way of thinking about these emails is that they are reminders that redirect people from email back into the tool. If you have the TeamDynamix email service, it can be used to ensure that any email replies are tracked via TeamDynamix.

9.2 Track your own project tasks in TeamDynamix

You may be assigned to a project in TeamDynamix but your organization or project manager does not track much about that project. There are still ways that you can track your tasks on that project.
One way is to ask for someone to create a card wall project plan for you on the project. This takes very little time. You can then add card wall tasks for yourself and manage those tasks. (See section 5.3.10.2)
Another way is to log your work as issues on that project. You can do this as long as the project issues component has been turned on (which is the default). Just create issues for each thing that you need to do. You can even record start and end dates.
Using the card wall to create tasks or using issues, you can then see all this work, and work from other projects, in the My Work application. (See section 6.1)

9.3 Show over-commitments with TeamDynamix

You may have been assigned way too much work to do at one time and you want to show that to someone—for example, your functional manager (i.e. boss).
Here are several ways to show how much work you have:

- Show people what shows up under "My Work." It will show all tasks and issues that have been assigned to you. This is a simple method but it does not provide much information beyond the list. (See section 6.1)
- Use TeamDynamix resource management, which requires projects to have resource estimates, and add time for your non-project work via workspaces. This method is unfortunately not easy to do on your own; your organization would have to set up TeamDynamix resource management.
- Pull a report of your current tasks, including the estimated hours for each task. To do this, first edit your tasks to add estimated hours, for example by clicking the task in "My Work." Second, from the "Projects/Workspaces" application, create a report of all your tasks.