TeamDynamix: Project Management
Version 11.7

UNH Training Reference Manual
*Provided by the Project Management & Process Improvement Office

Contents

What is TeamDynamix?

TeamDynamix is a project, portfolio, and service management software application specifically designed for higher education and used by a variety of organizations within the University System. The application allows departments to effectively simplify, manage and collaborate upon their work – whether large-scale projects or small, repeatable processes - from inception through planning and completion.

What are UNH Teams using TeamDynamix for?

1. Managing Work
   - Intake of requests: web forms, email capture or manual entry
   - Responsibilities/assignments, prioritization
   - Status updates

2. Project Tracking
   - Tasks
   - Milestones
   - Progress, Status
   - Issues
   - Project updates

3. Portfolio Management
   - Reporting
   - Strategic Management
   - Capacity Planning/Resource Management
   - Projects/work in the pipeline

4. Increased visibility across the team/transparency

User Roles

Team Member – Manages personal workload, enters work requests, provides updates, can create personal reports and dashboards to assist in work management and may record time if necessary.

Project Manager – Initiates projects, develops project plans, creates custom reports, responsible for updating project status, in addition to same permissions as Team Member.

Portfolio Manager – Capacity planning, workload prioritization, approval of project request, in addition to same permissions as Team Member and Project Manager.
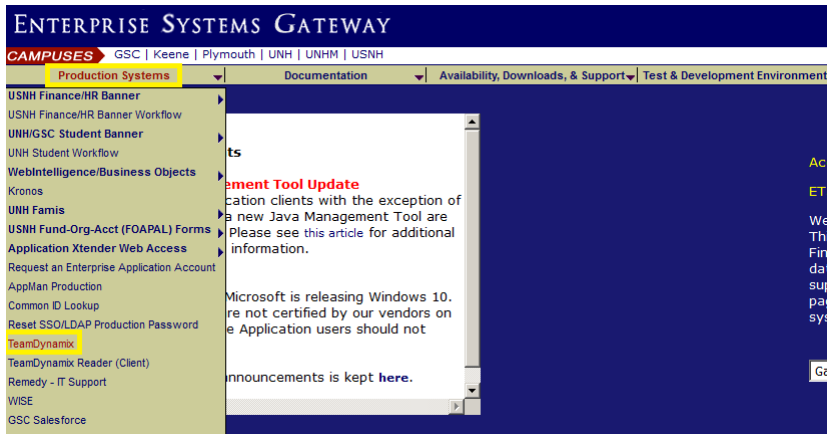
Executive – Receives and reviews reporting.

How to Login

Login to TeamDynamix Production

TeamDynamix Production is the active system.

1. Visit usnhgateway.org
2. Click on **Production Systems**
3. Click on **TeamDynamix**

Login to TeamDynamix Test

TeamDynamix Test is used for Training and Testing. You can use this environment for practice.

1. Visit usnhgateway.org
2. Click on **Test & Development Environments**
3. Click on **TeamDynamix**

Managing Projects

Creating a New Project

Note: These are the basic steps for project creation. Your department may require additional fields, which would be described in a supplement to this document.

1. Click on **Applications Menu** button to view your applications. You will see only the applications available to you based on your security role:
2. Select **Projects**
3. Select **+New > Project**

   Although there are many fields to serve a variety of needs, you do not need to complete them all. If a field is not mentioned, the default setting is recommended. **The following fields are required by our procedures**:

   - ➢ **Project Name**
   - ➢ **Type** This is generally the name of your Department.
   - ➢ **Acct/Dept** Typically, this is the name of your department (although some organizations use this field to indicate the customer).
   - ➢ **Start Date, End Date**
   - ➢ **Description** Describe the scope and deliverables of the project. This may need to be updated during the course of the project, for example if there were a scope change, it would become a permanent part of the 'Project Description'.
   - ➢ Based on the project type selected, there may be additional custom fields presented for completion. Fill out the necessary information, then scroll to the bottom of the screen to the Advanced section and complete fields as follows, below.

Project Impact – This section is required for ET&S, Research Computing, and Academic Technology only

   - ➢ Expected Project Outcomes
   - ➢ Impact if Project Not Completed
   - ➢ Project Tier
   - ➢ Link to Project Information Site, or Brief Public Description

   Advanced – Click to open the Advanced Section and complete the following:
   - ➢ **Project Template (optional)**
   - ➢ **Sponsor** The sponsor is a Person in an active senior management role, responsible to ensure the project remains viable and that benefits are realized; resolves any issues outside the control of the project manager.
   - ➢ **Portfolio(s)** A project can be part of one or more portfolios, which is a grouping of projects, for example by department, grant, or organizational objectives.
   - ➢ **Classification**
     - • *Enhancement* - An enhancement could be something that will augment or improve a program or process.

- *Feasibility Study* - Feasibility Study category is used for projects that are being done to determine the viability or achievability of a project.
- *Maintenance* - Maintenance is selected for work that is required on a regular basis to perform upgrades and new releases, etc.
- *New* - New is an undertaking of some work that has never been done before or does not replace a system or process that is currently in place.
- *Operational* - Operational projects are filtered out of most reporting as these items are considered not to be "real" projects – so Admin time, holidays, user support, regular daily duties, etc. fit here. This is used to help with meeting 100% time recording obligations.
- *Regulatory* - Regulatory is for work that is required by a governing or monitoring body to meet requirements to remain in adherence to laws regulations.
- *Upgrade*

➢ **Priority**
➢ **Status**
➢ **Health**

4. Click Save.

Resources

I. Click **Actions > Add Resources**
II. Enter **Name** – or - **Resource Pool** then select **Search**
III. Check the box to the left of the person(s) you would like to add as resources on the project.
IV. Click **Next**
V. By default, the person(s) will receive an email letting them know they have been added to the project. If you do not wish to generate an email, uncheck **Notify resources that they have been added**.
VI. Add a schedule (optional, for capacity planning).
VII. Click **Save**

Goals

Click **Add.** Highlight any relevant goal, add comments, and click Save.

Repeat until all applicable goals have been added.

Settings (optional)

This section allows the Project Manager to control:
➢ Components available on the project (i.e., Briefcase, Links, Announcements),
➢ Time Types used when recording time,
➢ General settings related to the project such as Alerts to the Project Manager when the assigned hours for plans exceed scheduled hours, or estimated hours for the plan exceed estimated project hours.

5. Close the New Project entry screen.
6. Return to the Projects application. Select **Refresh** and you should see the new project in the list of active projects in the left navigator.

Managing Projects

1. Click on **Applications Menu** button ▦ then choose **Projects**
2. On the left-hand navigation bar, choose **Manage Projects**

   The **Manage Projects** module is the hub for project administration activity. The users assigned as project manager and the alternate manager are the only people who can make changes via the Manage Projects module to that project. Project managers can easily:

   a) View the project and project members they manage.
   b) Monitor project team activity via summary reporting.
   c) Create new projects.
   d) Add people to project teams.
   e) Add workflows for the project members to use.
   f) Add expense types to make sure only authorized expense types are used on the project team.
   g) Add time types to make sure only authorized time types are used on the project team.
   h) Deactivate people from projects.
   i) Activate, deactivate and/or close projects.

Updating Project Status

The project manager may update the project status and make comments that will be presented to the executive reporting tools. This should be done on a monthly basis.

1. Click on **Applications Menu** button ▦ then choose **Projects.**
2. Click the **Manage Projects** folder in the left navigator bar.
3. In the Manage Projects window, select the appropriate project and open.
4. Click on the **Update** button.
5. This will open the status update window.
6. Select the appropriate status from the **New Status** dropdown list.
7. Select the appropriate Health from the **Health** dropdown list.
8. Update the **Percent Complete.**
9. Enter **Comments** providing a detailed description of the project objectives using the following format:
   a) Summary Status
   b) Recent Accomplishments (list)
   c) Issues (list, high-level)
   d) Upcoming Milestones/Deliverables (list)

Note: Using this format is important for your sponsor to get a quick glimpse of what's going on.
10. Click the **Save** button.

Choosing a Plan Type: Card Wall or Waterfall?

Card Wall plan types are managed using the Card Wall user interface, while Waterfall plan types can be managed with the Web or Windows based Plan Manager Applications. Waterfall plans are designed to manage complex plans such as those with interdependent tasks and shared task responsibility. Card Wall plans are designed to manage simple plans with tasks worked by collaborative teams. Card Wall is used to 'hit the ground running' for small start-up projects that will not last for an extended period.

It is not possible to convert plans from Card Wall to Waterfall or vice versa. Carefully consider the features of each type of project plan before creating a new project plan.

The following features are only available in Card Wall plans:
1. Real Time Updates
2. Drag and Drop Status Updates
3. Drag and Drop Percent Complete Updates
4. Subtask Checklists
5. Task Archive
6. Task Color Coding

The following features are only available in Waterfall plans:
1. Check In/Check Out editing
2. Shifting
3. Milestones
4. Predecessors/Dependencies
5. External Dependencies
6. Parent/Child Tasks
7. Cut/Copy/Paste Tasks
8. Plan Export/Import
9. Issues (available from TDNext Task Edit)
10. Add Time for Other User (available from TDNext Task Edit)

Creating a Project Plan using Waterfall

1. Click on **Applications Menu** button [⊞] then choose **Projects**.
2. Click on the appropriate project name link in the left navigation bar.
3. Click on **Plans**.
4. Click on the **New** button in the ribbon bar.
5. Enter a name for the new plan.
6. Enter a description for the new plan if desired.
7. Select **Waterfall**.
8. Choose whether to start with an empty plan, or you may choose to import the following:
   i. Use a plan from an existing Project Template
   ii. TeamDynamix .TDplan File

iii. Microsoft Project XML
9. Select whether or not to check out the plan.
10. Click on the **Save** button.
11. Close window and select **Refresh** button to see the plan.

Card Wall

Card wall is used for managing project tasks and is based upon a physical card wall. Just like its real‐life inspiration, users can create columns and cards. Teams can also drag and drop cards as they complete their work.

The virtual card wall has some advantages over a physical card wall:

- No need for index cards, tape, sticky notes, markers, or wall space.
- Users can quickly and effortlessly rearrange the card wall.
- Data and information is more secure because it's stored in the system.
- Team members can see and interact with the card wall from any location.
- Managers can easily track and report on progress through automated reports.

There is an option available when creating a plan that allows you to specify whether the new plan should be Waterfall (for use with Plan Manager) or Card Wall. Card Wall is not supported in Plan Manager, nor in the Client Portal.

Creating a Project Plan using Card Wall

1. Click on **Applications Menu** button then choose **Projects.**
2. Click on the appropriate project name link in the left navigator bar.
3. Click on **Plans**.
3. Click on green **New** button in the ribbon bar.
4. Enter a name for the new plan.
5. Enter a description for the new plan if desired.
6. Select **Card Wall**.
7. Click on the **Save** button.
8. Select **View the plan you just created** to open the plan.

Adding Cards

1. Click on green **+** icon
2. Enter card title
3. Select enter key to save

Editing Cards

Cards can be edited which allows for specification of detailed task information such as responsible person, description, and color-coding the card.

1. Click on pencil in upper right-hand corner of card
2. Apply edits and **Save**

Card Components

Title – Card task name.
Description – Add optional details**.**
Start / End – Enter card task start/end date.
Estimated Hours – Enter estimated hours.
% Complete - Manually enter % complete or lists can be automatically configured to update a card's % complete when the card is dropped into the list.
Priority – Prioritize card with High, Medium/High, Medium, Medium/Low, or Low drop-down options.
Is Story - Set value indicating whether this task is a story.
Story Points – Assign a unit of measure to convey an estimate of effort influenced by the amount of work, complexity, risk and uncertainty.
Value Points – Assign a relative measure of the value returned by each user story.
Responsible – Card tasks can have multiple responsible users, which are represented by user profile pictures or initials when viewing the cards on the board.
Tags – To group multiple cards together.
Color – To color code a card select the color box option.
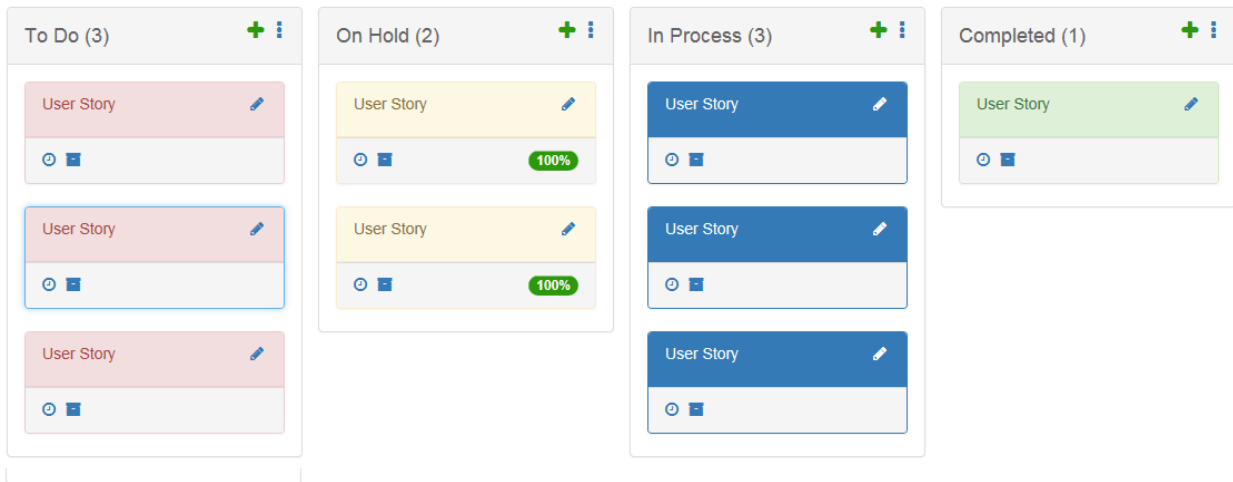**Feed** - Area to add comments. An audit trail, which captures events that occur in the system.
Subtasks – Break down a task by adding subtasks.
Work - Add working time.
Attachments - Add attachments.
Issues – An issue can be added if there is a problem impacting the task. An issue can also be used for capturing action items and decisions.

Card Wall Highlights

- Cards can be dragged and dropped between lists to indicate the status of the work being done.
- Lists can be configured to automatically update a card's percent complete when the card is dropped in the list.
- Cards can have multiple responsible users, which is represented by user profile pictures or initials when viewing the cards on the board.
- Updates to the cards show up in the feed.
- Time can be entered directly from the board for a specific card and shows up under the work tab for the card.
- Subtasks, Attachments, and Issues can be added to tasks.

Archiving Cards

Cards can be archived to remove them from the screen without permanent deletion. Once a card is archived, it appears on the archive list. From the archive list, cards can be restored or permanently deleted.

How to archive a card:

1. Click on file icon on card:
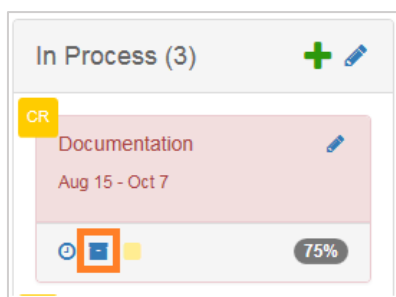
2. Confirm you want to archive and card will move to the Archive area.
3. To view Archived cards, click on ≡ menu button in upper-right hand corner.
4. In the Settings section, check the **Show Archived Cards** box.
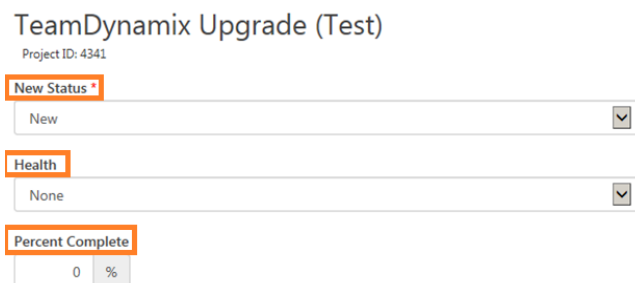
Creating a Burndown Report

The Burndown report can be accessed directly from the Card Wall menu. A card is simply a specialized type of task. Cards will show up as tasks in reports and desktop modules that currently display task information.

1. Open Card Wall project plan.
2. Click on ≡ menu button in the upper-right hand corner.
3. In the Plan Details section, select **Burndown Chart.**
4. Select Dates and Resources.
5. Click on green **Run Report** button.

Project Status and Health

Project Update Options

When updating a project, managers have options for selecting the project's status, health, and percent complete:

Project Status Field

By default, the following Project 'Status' fields are available:

- In Process
- New (Not Started)
- On Hold

Project Health Field

The Project 'Health' field contains the following values:

1. *None*
2. *Green* - Project is on track
3. *Yellow* - Project is at risk with corrective actions
4. *Red* - Project is at risk with no corrective actions

Viewing Project Health

In TDNext, users can see the Project Health by selecting **Project Details** in left-hand navigator:

Reporting on Project Health

Users that have access to the Analysis application can report on project health:

1. Open **Analysis** application
2. Click on **+New** and **Report**
3. Click on **Project Report**
4. Name your report
5. In the **Select the columns you would like to see** section, choose the **Health** field from:

6. Select **Save and Run** to view report.

TeamDynamix Support

Join the TeamDynamix Community
https://community.teamdynamix.com/

Register for UNH TeamDynamix Classes
https://ittraining.unh.edu/apps/ssr

Search the UNH IT TeamDynamix Knowledge Base
https://td.usnh.edu/TDClient/KB/?CategoryID=130

https://tdforms.usnh.edu/teamdynamix/

Submit a UNH TeamDynamix Support Request
https://td.usnh.edu/TDClient/Requests/ServiceDet?ID=120