# TeamDynamix: Reporting

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 Role Permissions

**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.

# Standard Reports Pre-Configured

## Applying Filters to Existing Standard Reports

1. Click on the Tickets tab.
2. Select a report from the **Standard Reports** section in the left-hand navigator.
3. Click on green filter Tickets button in upper-right hand corner.
4. Choose the field you would like to filter and enter information.
5. Select green **Apply** button.

## Viewing Tickets Assigned To Me

1. Open **Tickets** application.
2. In the left-hand navigator, go to **Tickets** section.
3. Click on **Assigned To Me**.

***Note:*** *Incidents, Problems, Changes, Releases, and Service Requests will also be displayed.*

## Viewing Tickets Awaiting My Approval

1. Open **Tickets** application.
2. In the left-hand navigator, go to **Tickets** section.
3. Click on **Awaiting My Approval**.

## Commonly-used Standard Reports

The following standard reports are located in the **Tickets** application, **Standard Reports** section in the left-hand navigator:

**Ticket Aging** – Shows age of Overdue Tickets and Priority Level.
**Ticket Performance** – Shows Tickets by Account, Type, and Responsible Person.
**Ticket Count Report** – Displays Person, Avg Days Old of Open Ticket, and # of Tickets open/pending.
**Ticket History** – Shows # of tickets moved to a status class of New, In Process, or Completed for the first time with the specified date range, broken down by week or month.

## Viewing a Standard Report Description

1. Go to either the **Tickets**, **Analysis** or **Projects / Workspaces** application.
2. In the left-hand navigator, go to the **Standard Reports** section.
3. Click on a standard report (i.e. Ticket Aging Report, Actual Hours Report, Status Reports).
4. Select the blue **Help** button to view the report description.

# Customized Report Creation

## Which TeamDynamix application do I use to create a Report?

Just about every application in TeamDynamix has the capability to create customized reports using data from that application. For example: The Project/Workspaces application allows for the creation of Project, Issue, Task, and Plan reports; any ticketing application (i.e. "IT Service Management" or "Advancement") allows for the creation of Ticket and Ticket Task reports; and so on.

Users with Project Manager or Portfolio Manager security roles also have access to Analysis, and Finance applications, which allow for a more centralized reporting area where various reports can be aggregated – for example in Analysis, a user can create and view reports related to the Projects application, and to tickets.

Since not all users have access to Analysis and Finance, an important consideration in which application to use in creating a report is with whom the report will be shared to ensure they will be able to view and use the report. Generally, creating the report in the application in which it will be used is the best choice, however TeamDynamix does have the capability to move a report if circumstances change.

## Creating a Custom Report

This example creates a report from a Ticket application; however this model can be followed throughout TeamDynamix applications.

1. Click on Applications Menu (waffle) button in upper-left hand corner and select your department's ticketing application (i.e. Tickets, Advancement Tickets, SPA Tickets). A tab will be displayed on top navigator.
2. Click on your department's Ticketing application/tab.
3. Click on **+ Report** in the top toolbar and select **Report**.
4. Under '*What type of report would you like to create?*', select the appropriate data source (i.e. 'Ticket Report' or 'Ticket Tasks Report').
5. Type in a report name in the **Name** field and add a description (optional) in the **Describe your report** field.
6. The blue **Help** button will display useful information on the fields and KPIs available for reporting.
7. Select the columns you would like to see displayed in the final report.

   ***Note**: If planning to create a Chart with this report, **a maximum of 2 columns can be used.** The first column would be the data element you want to use to aggregate the data (i.e. Status, or Prim Resp). The second column needs to be numeric in nature (i.e. Ticket Count, Project Count) depending on the type of report you are creating. **Gantt charts do allow some additional columns to meet the criteria of that chart type.***

To modify an existing Column Field:

1. Click the drop-down arrow in the existing Field.
2. Select the new Field you would like to use.
3. Select **Save**.

To add a new Column Field:

1. Select green **Add** button.
2. Scroll down to newly created field.
3. Click on drop-down arrow and choose a field.
4. Click on **Save**.

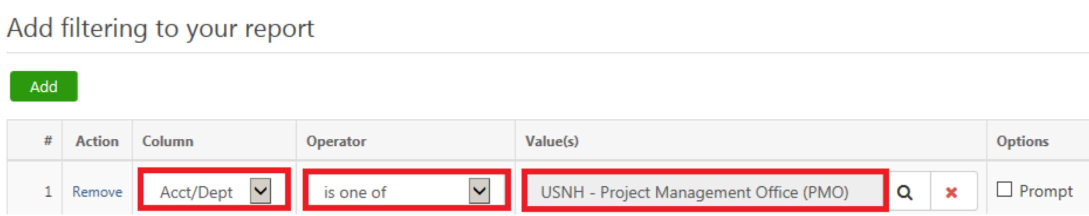
To remove a Column Field:

1. Select **Remove** to the left of the Column Field.
2. Click on **Save**.

8. Add Filtering to the report.

Filters are not limited to the data included in the report columns.

In this example we selected filters in the *Column*, *Operator*, and *Value* fields:

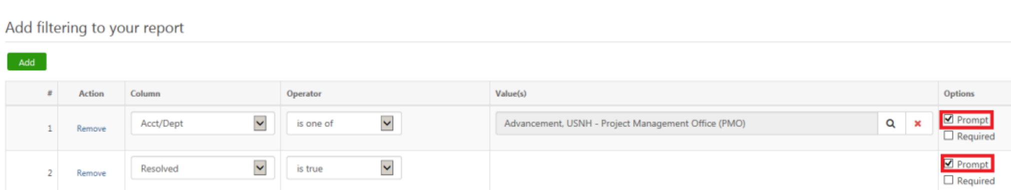



9. Add a Filtering Prompt (optional).

The Prompt option is used for quick access to modify filtering criteria.

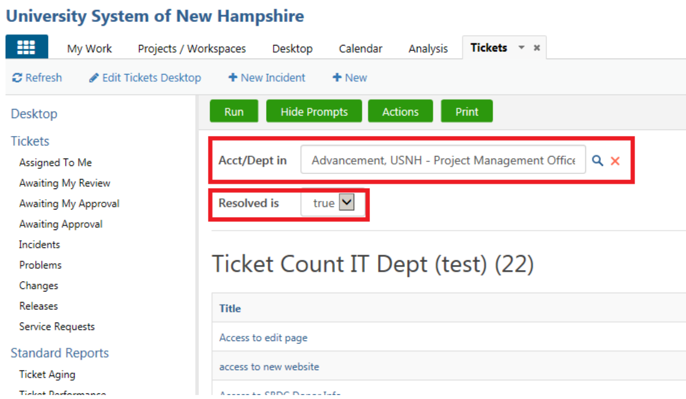
In the example below, two prompts for *Acct/Dept* and *Resolved* were selected to enable quick access filtering modification, which is displayed on top of report after it is run:

1. Click inside the Prompt box(s):




***Note:*** *Required option will populate after clicking inside Prompt option box.*

2. After the report is run, the prompts are displayed for quick access filter modification. Once the new filter information is chosen, select the green **Run Report** button.




10. Choose Advanced Filtering (optional).

    1. If you choose to specify advanced filtering syntax using parenthesis and the Boolean operators **AND OR**, click on the green **Show Advanced** button and enter syntax.

    2. Click on **Save**.

11. Order your report (optional).

    Select **Order by** field from drop-down and choose Ascending/Descending from drop-down.

12. Set the maximum number of rows to retrieve.

    By default, the report will retrieve up to 500 results. If needed, edit to any whole number between 0 and 50,000.

13. Set the Visibility of the report.

    Choose **Just Me**, **Everyone with this Application**, or **Me and the people in these Groups**.

    Check or uncheck **Do not show this report in the navigator (desktop module only)** to choose whether the report will show in the left-hand navigation pane.

    *If choosing **Me and people in these Groups**:
    1. Click on magnifying glass (Group Lookup window opens).
    2. In Search box, type in a portion of your group name.
    3. Click on the green **Search** button.
    4. Check the box to the left of Group box.
    5. Click on the green **Insert Checked** button.

14. Add a Chart (optional).

    Click on Type drop-down arrow to select chart options.
    ***Note***: *If planning to create a Chart with this report, a maximum of **2 columns** can be specified in the Columns section of the report creator – review that step if needed.* ***Gantt charts do allow some additional columns to meet the criteria of that chart type.***

15. Desktop delivery.

    If a chart type was selected in previous step, the **Grid** or **Chart** options are available to show how report will be displayed on your Desktop (Dashboard).

    Select from the **Page Size** drop-down arrow, the amount of rows displayed for each page.

16. Email Delivery.

    Configuring the email delivery sends the report to the recipient's Outlook email based on the set schedule:

    To set Delivery Schedule:
    1. Click on green **Add** button.
    2. Select Daily, Weekly, or Monthly from **Interval** field drop-down.
    3. Supply day and time information (information needed varies depending on interval selection).
    4. Choose Excel, PDF, or HTML in the **Format** field.
    5. Search **Recipients** from magnifying glass.

       ***Note:*** *To add multiple recipients, search name and click in box to the left of person's name. Continue to search names and click in box to the left of person's name. When finished searching and selecting all the names, click on the green* ***Insert Checked*** *button. All the names selected will display in* ***Recipients*** *field.*

    6. Click on **Save**.

17. Run Report.

    At the top of page, click on the **Save and Run** button to display your newly created report.

    This newly created report will be available for future use, in the **Ticket Reports** section of the left-hand navigator.

    Reports can be edited by the owner as needed by clicking on green **Actions** button and edit.

    Reports can be added to the desktop by any user who has visibility into the report. If there are filtering prompts, the desktop will always use the defaults.

## Exporting a Report to Excel

1. Open report.
2. Click on green **Actions** button.
3. Select **Export to Excel.**

## Copying a Report

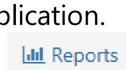
1. Open report.
2. Click on green **Actions** button.
3. Select **Copy.**
4. Create a **New Name.**
5. Choose whether to **Copy Visibility Permissions.**
6. Select **Save.**
7. Choose **View the new report.**
8. Edit the report parameters.
9. Click on **Save and Run.**

## Moving a Report between TeamDynamix Applications

***Note****: Only the Report Owner or Report Owning Group can perform this action.*

1. Open the report in its existing application.
2. Click on the green **Actions** button.
3. Select **Move.**
4. The **Move Report** window opens.
5. In the **New Application** field, select the destination application from the drop down.
6. Select the green **Save** button.
7. A pop up will ask, '*Are you sure you wish to move the report*?'
8. Click **OK.**

## Hiding Reports in the Analysis application

1. Open the **Analysis** application.
2. Select **Reports** button 

on top menu bar.
3. Scroll down and uncheck the **Show in Navigator** boxes for the reports you choose to hide from the left-hand side navigator.
4. Select **Save.**

## Deleting a Customized Report

***Note:*** *Reports can only be deleted by the owner or owner group.*

1. Open the report from the left-hand navigator.
2. Select **Actions > Delete.**
3. A pop up will ask, '*Are you sure you want to delete this report*?'
4. Click **OK**.

## Creating a New Reports Desktop

1. Open **Desktop** application by clicking on the **Desktop** tab in top navigator.
2. Select **+New Desktop** from top menu bar.
3. Name the Desktop and **Save**.
4. Choose the reports you would like for your display view in **Available Content** section located in left-hand navigator. Click on the report located in left-hand navigator located in the Tickets, Analysis, or Projects/Workspaces section and drag and drop to your preferred column.

   ***Note:*** *A grey border is a stock report available from the vendor. A green border is a custom report created through the Analysis, Tickets, or Projects / Workspaces application.*

5. Click **Save** and close **Edit Desktop** window.
6. Select **Refresh** from top menu bar in upper left-hand corner.
7. Select your newly created desktop/dashboard from the drop-down in upper-right hand corner.

## Editing an Existing Reports Desktop

1. Open **Desktop** application by clicking on the **Desktop** tab in top navigator.
2. Select **Edit Desktop**.
3. Choose the reports you would like for your display view in **Available Content** section located in left-hand navigator. Click on the report located in left-hand navigator located in the Tickets, Analysis, or Projects/Workspaces section and drag and drop to your preferred column.

   ***Note:*** *To remove reports you no longer wish to see on the desktop. Click on the report located in the Columns area, drag and drop module in the* ***Available Content*** *section in left-hand navigator.*

4. Click **Save** and close Edit Desktop window.
5. Select **Refresh** from top menu bar in upper left-hand corner.

# Project Reporting

The Analysis application shows an aggregate of reports such as Project, Ticket, and Task reports.

## Searching Active Projects

1. Open **Analysis** application.
2. In left-hand navigator go to **Project Searches** section and click on **Active Projects Search.**
3. Click on green Filter icon in upper right-hand corner.
4. Select a tab:
   *Standard Fields* – Provided by TeamDynamix
   *Custom Fields* – UNH only
   *Layout* – Use the arrows located between **Available Fields** and **Selected Fields** to move fields. The arrows to the right of **Selected Fields** will change the **Selected Fields** order.
5. Enter filter information in **Standard Fields**.
6. Select green **Apply** button.

   ***Note:*** *To display a Gantt chart select green **Show Chart** button at top of right-hand pane and scroll down page to view.*

## Saving a Project Search

Follow the *Searching Active Projects* steps above, then proceed with following steps:

1. Select the green **Save Search** button.
2. Enter Search name in **Save As** field.

   ***Note:*** *The **Global** box checked means that all users in the TDx application can use the search.*

3. Click on green **Save and Close** button.
4. Saved searches will be displayed under **Project Searches** in left-hand navigator.

## Deleting a Saved Project Search

1. In the **Analysis** application, go to left-hand navigator **Project Searches** section.
2. Click on the saved search you would like to delete.
3. Click on green **Show Details** button on top of right-hand pane.
4. Click on red **Delete** button.
5. At the '*Are you sure you want to delete this saved search?*' message, click on **OK**.

## Project Report Types

**Canned Reports** - Built by TeamDynamix but still customizable, (i.e. Resource Reports and Standard Reports) which are available in the **Analysis** application left-hand navigator.

**Customized Reports** - Created by application users in the Tickets, Projects / Workspaces, or Analysis application. ***Note:*** *Not all users have access to the Analysis application.*

## Creating a Report Folder

Folders can be created in any application that supports reporting to improve organization of reports displayed in the left-hand navigator.

1. Open the New Report Folder window – this can be done in one of three ways:
    a. While building a custom report you can create a new folder by clicking the **green + button** near the "**Choose a report folder**" field.
    b. In Ticketing applications, select **+Report** > **Report Folder** on the toolbar.
    c. In all other applications, select **+New** > **Report Folder** on the toolbar.
2. Provide a name for the report folder.
3. Optionally add a description. This description will only display on the Edit Report Folder screen.
4. Choose an Order. Folders are sorted by Favorite, then Order, then Name.
5. Choose if you want to mark this folder as a Favorite. Favorite folders only apply to the individual, even if the folder is shared.
6. Set the visibility of the folder. The visibility controls who can see the Folder. *Note: Each report's own visibility will still control who can see that report.*
    a. Just Me – the folder will not be shared with others.
    b. Me and people in these Groups – you'll define a set of Groups who can see the folder.
7. **Save**.

# 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 Knowledge Base
https://td.usnh.edu/TDClient/KB/?CategoryID=130

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