TeamDynamix: Basic Navigation & Ticketing
Version 11.7

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

Logging into TeamDynamix Production

TeamDynamix Production is the active system.

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

Logging into TeamDynamix Sandbox

TeamDynamix Sandbox is used for Training and Testing. This is an environment you can use for practice.

1. Visit usnhgateway.org
2. Click on Test & Development Environments
3. Click on TeamDynamix
4. Click on TD Test
Desktop

Viewing Profile and Adding a Picture

1. Click on your name in the upper right-hand corner:

2. Select My Profile
3. Click on Edit
4. In the Profile Picture section click on Browse
5. Choose file and Open
6. Click on Save

Creating a To Do List

The To Do List is a reminder for your personal items and cannot be used for time recording. Tickets and project tasks are where you would record time.

1. Click on To Do List box in upper right-hand corner:

2. Start typing in your To Do items to the right of check box:

3. Click inside the check box when you have completed each item.

**NOTE:** To Do List items will automatically be added to your My Work area as well.
Viewing Applications

1. Click on **Applications Menu** button  to view your applications. You will see only the applications available to you based on your security role:

![](image1)

Arranging and Creating your own Desktop View

1. Click on **Desktop** (top navigator tab).
2. Click on **Edit Desktop**
   
   *Note:* New TDx users click on +**New Desktop**. The **New Desktop** window will display. Enter a name for the new desktop and **Save**.

3. Click on **Content** tab and select the content you would like for your desktop view from the left-hand navigator, **Available Content** area. *Note: Click on the specific application to view all available content.* Click and hover over item and drag and drop to your preferred Column:

![](image2)

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

<table>
<thead>
<tr>
<th>TD Tickets / Tickets</th>
<th>TD Analysis / Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Assigned Tickets</td>
<td>Account/Dept. - PMO</td>
</tr>
</tbody>
</table>

4. Click **Save** or if you wish to rename your desktop click on **Details** tab, name your new desktop, **Save**, and close your **Edit Desktop** window.

5. To view your Desktop with changes, select **Refresh** in upper-left hand corner of menu bar.
Switching between Multiple Desktop Views

You can toggle between multiple Desktop views by choosing from the drop-down arrow located in upper-right hand corner:

Deleting a Desktop View

1. In the Desktop app, click on the Manage Desktops wheel
2. Select Delete next to the Desktop you want to remove:

3. Click on Manage Desktops arrow to return to desktop.

Changing the Desktop Layout

1. Click on Desktop
2. Click on Edit Desktop
3. Click on Edit Layout
4. Choose Layout and Save
5. Close the Edit Desktop window
6. To view your Desktop with changes, select Refresh in upper-left hand corner of menu bar.

Managing Tabs

1. Clicking on an Application icon, (i.e. Calendar) in the Application Menu will also open a tab which will remain even after logging out of TeamDynamix:

2. You can rearrange tab order by clicking on the tab, dragging, and dropping.
3. You can close a tab by clicking on the ‘x’ located on the tab.
My Work

To access My Work click on the Applications menu (Waffle button) in the upper left-hand corner and select My Work.

What is My Work?

The My Work Application is the area where all the work assigned to you is available to review and manage. Here you can provide updates on the progress of your work and record time (optional).

In the left-hand navigator, you will see the following sections:

**My Assignments**
My Assignments is a master task list with everything you are assigned to for the foreseeable future such as:
- Tickets – Captures small bodies of work under 80 hours of effort.
- Tasks – Tasks on a project plan that have been assigned to you or others.
- Issues – Things going awry on a project (i.e. bugs, risks, testing).

**My Work**
You can move tickets and tasks from My Assignments to My Work to make it easier to focus only on selected tasks that you need to work on that particular day or week.

**My Timecard**
This section allows you to review and submit your timecard.

Moving tasks from My Assignments to My Work

1. Go into **My Assignments**
2. You can use Group and Sort sorting/filtering capabilities:

   ![My Assignments (45)](image)

3. Go to the task you would like to move to My Work
4. Click on +**My Work**:

   ![My Assignments (5)](image)
5. The task moves from My Assignments to My Work
6. To move the task back to My Assignments click on x My Work:

Rearranging Items in My Work

1. Go to Task
2. Click on grey squares to the left of task you would like to move. Drag and drop in your preferred order. You can also click on Move to Top:

Commenting and Notifying in a Task

1. Go to task and click on Comment
2. Enter comment
3. Optional: To notify team member click in Notify field and click in box to the left of team member’s name.
4. Click on Save

Creating an Issue from your Project Task in My Work

If there is a problem that’s impacting a project task, you can log it as an issue. An issue can also be used for capturing action items and decisions.

1. Click on Applications Menu button
2. Click on My Work
3. Open the project task
4. Click on Issues tab
5. Click on +New
6. Fill out fields and Save

Note: You can add a new category by clicking on the green + button to the right of category field.
Updating a Task

1. Click on **Update** and a new explorer window opens:

   ![Image](image1)

2. You can add Percent Complete (or Hours Remaining), Hours and send notification emails.
3. Click on **Save**

**My Time Card**

Tasks added to My Work will automatically appear in your Time Card for time entry. Time can be entered in **My Time Card** or in **My Work** on the task.

**Adding Time in My Time Card**

1. Click on + plus icon to the left of task
2. Select a Time Type from drop down arrow
3. Enter number of daily hours spent working on task
4. Enter description (optional)
5. Click on **Save**

**Entering Time in My Work**

1. Click on **Add Time** located under the task name
2. Select a Time Type from drop down arrow
3. Enter hours spent working on task
4. Enter description (optional)
5. Click on **Save**

**Tickets**

A ticket is a small body of work under 80 hours. They are also used for intake as some groups have web forms the customer fills out and the information is delivered into TeamDynamix as a ticket. A ticket could also be an enhancement request, vendor request, or work that can be easily accomplished.

Tickets are flexible and can be worked independently, bundled together, converted to a project, or brought into an existing project as a task.
Accessing the Ticket Application

1. Click on Applications Menu button.
2. Click on Tickets
   
   **Note:** Some Departments have their own Ticket segment and should select their appropriate segment located in the Applications Menu.

Creating a Ticket

1. Click on + Select Form... in top menu bar:

   ![Select Form](image)

   **Note:** You can also click + New in the top menu bar, then choose Problem Form, Change Form, Release Form, or Service Request Form:

   ![New](image)

2. Click inside the Form field and select a form
3. Fill out remaining fields and Save

2. Fill out the following ticket fields and Save:
   
   **Form** – If you know the name of the form you can type ahead. If you don’t know the name of the form, select from dropdown arrow, and use slider to choose an Incident or Service Request form.

   **Template** – Skip unless using a ticket template. TeamDynamix users can create their own ticket templates for frequently used tickets.

   **Service** – The Service is what the client is requesting or trying to do. The Service is defaulted by the form. If you need to add/change the service, begin typing the name of the service and choose from quick-search below the field, or click the magnifying glass to search.

   **Type** – Controls assignment and how work is organized.

   **Requestor** – Select person.

   **Note:** If user is not listed, add person by clicking on + icon. Add user’s First Name, Last Name, and enter Primary and Alert Notification Email addresses.

   **Acct/Dept.** – This is usually the customer’s department.

   **Note:** If the group isn’t listed, check the ‘Show Sales Accounts’ box after selecting the search (magnifying glass).

   **Title/Request Title/Summary** – Add a brief summary description (similar to a subject line in Outlook).

   **Description** – Provide additional request details.

   **Attachment** – Browse and attach file. If more than one file needs to be attached use your Ctrl key to select more than one file.
**Impact** – Choose Minor/Localized, Moderate/Limited, Significant/Large, or Extensive/Widespread from drop-down. (not required)

**Urgency** – Skip this field.

**Priority** – Select Low, Medium, High, or Critical from drop-down. (not required)

**Responsible** – Select user or group that will be assigned ticket. Checking the ‘Notify Responsible’ check box sends the responsible user an email notification. Responsible field doesn’t have to be filled out immediately, but if it is left blank the ticket will be unassigned.

**Source** – Skip this field unless your group is reporting on intake method tracking.

**Start Date** – Defaults to today and indicates the date ticket work is expected to start. Select date using the date picker.

**Due Date** – Defaults to tomorrow and indicates the date work on the incident is expected to complete. Select date using date picker.

**Status** – This is a framework, and each group should define how they are using these designations. The following are suggested definitions:
- **New** - Entered, not yet reviewed, and assigned
- **Open** - Ticket has been viewed, acknowledged, and assigned
- **In Process** - Work underway
- **Closed** - Work completed
- **Pending** - Awaiting information
- **On Hold** - Awaiting action from the requestor
- **Cancelled** - Ticket declined and/or withdrawn

**Task Template** – Skip unless using a task template. Task templates are used for a series of tasks used often and need to be implemented by a TeamDynamix Administrator.

**Location** – Skip this field.

**Assets/CI** – Skip this field (unless your dept. is tracking assets).

**Estimated Hours** – Skip this field.

**Time Budget** – Skip this field.

**Expenses Budget** – Skip this field.

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**Viewing Tickets Assigned to Me in the Ticket Section**

1. Open **Tickets** application
2. Click on **Tickets** in left-hand navigator
3. Click on **Assigned To Me**

   **Note:** 'My Assigned Tickets' can also be displayed in the Desktop

**Assigning or Reassigning a Ticket**

1. Open ticket
2. Click on green **Actions** button
3. Select **Reassign Service Request**
4. Type name in **New Responsibility** field
5. Click on **Save**

   **Note:** TeamDynamix Administrators recommend that you assign Tickets to Groups rather than a person.
Taking a Ticket
1. Open ticket
2. Click on green Actions button
3. Select Take Incident
4. A pop up will ask, ‘Are you sure you want to take primary responsibility for this Incident?’
5. Click o.k.

Updating a Ticket
1. Open ticket
2. Click on green Actions button
3. Click on Update

Adding Time to a Ticket
1. Open ticket and go to the T&E (Time & Expenses) tab
2. Click on green Add Time button
3. Choose Time Type from drop down arrow
4. Enter Hours
5. Enter Time Date
6. Select Save

Copying a Ticket
1. Open ticket
2. Click on green Actions button
3. Select Copy Incident or Service Request
4. Click on green Save button

Adding an Attachment to a Ticket
1. Open ticket
2. Drag and drop file to the Attachments area on right-hand side.
   Note: You can also click the + sign in the attachments field to browse your computer.

Viewing the Ticket Feed
The Feed is an audit trail capturing all activity in the ticket.
1. Open ticket
2. Select General tab
3. Scroll to bottom of page to the Feed area
4. You can add a comment to the feed by clicking the green Comment button
5. Type comment in box
6. Select Save
How the Ticket Feed works with Email Reply Processing

This feature reduces the burden of copying / pasting emails and uploading documents in TeamDynamix.

A TDx user can generate an email notification to another party from a TDx item, i.e. a ticket, project, briefcase, or file. These notifications are stored in the item’s feed. Any email replies are sent to the original sender’s email and the item’s feed. If the TDx notification was generated from an item that can hold a file, i.e. a ticket or briefcase file, then any attachments included in the response will be automatically posted in TDx as well.

*Note:* If the email conversation continues after the initial response, those communications are not captured. To document an ongoing conversation in TDx, the TDx user should Comment/Reply from TDx rather than email.

Filtering and Searching Tickets

1. Open Ticket Applications
2. Click on Tickets in left-hand navigator
3. Click on green filter button in upper-right hand corner
4. Enter search criteria by clicking on magnifying glass to the right of the field you want to use for searching.
5. Explorer window opens.
6. Enter Search Phrase and click on Search
7. Check box to the left of Name
8. Click on Insert Checked
9. Select Apply

*Note:* You can save a search by clicking on the green Save Search button and access it in the future using the green My Saved Searches button.

Creating Ticket Templates from an Existing Ticket

1. Click on Tickets in left-hand navigator
2. Open the ticket that you want to use as a template
3. Click on green Actions button and select Create Ticket Template
4. Create Template Name
5. Edit the fields and Save
Creating Ticket Templates for Repeating Tickets
1. Open Tickets application
2. Click on gear button in upper-right hand corner
3. Select New Ticket Template
4. Fill out fields and Save

Locating Newly Created Templates
1. Click on Settings wheel in upper-right hand corner:
   ![Settings Wheel]
2. Select My Templates

Assigning a Ticket to Workflow
This allows for task and approvals to be completed. Workflows need to be built by a user with Administrative rights. Contact TeamDynamix Administrators if desired.
1. Open ticket
2. Click on green Actions button
3. Select Assign Workflow

Adding a Ticket to the Calendar
1. Open ticket
2. Click on green Actions button
3. Click on Add to Calendar

Viewing a Ticket in the Calendar
1. Open Calendar application in main applications menu
2. Click on filter button in upper-right hand corner
3. Verify Include Published Tickets box under Tickets is checked.

Scheduling Tickets
Scheduled tickets are based upon a ticket template that you create (or that is available to you).
1. Open Tickets application
2. Click on gear button in upper-right hand corner
3. Select New Scheduled Ticket

Viewing Scheduled Tickets
My Schedules will display tickets you have scheduled to auto-generate on a regular basis.
1. Open Tickets application
2. Click on gear button in upper-right hand corner
3. Select My Schedules
Ticket Tasks

Adding a Task to a Ticket
1. Open ticket
2. Click on green Add button
3. Click on Task
4. Fill out fields
5. Click on Save

Updating a Task
4. Open ticket that contains task
5. Go to task on right-hand side of screen
6. Select Update
7. You can add Percent % Complete, Hours and Notification emails.
8. Make changes and Save

Commenting on Tasks
5. Open ticket that contains task
6. Go to task on the right-hand side of screen
7. Select Update
8. Enter comment and Save

Accessing My Work to see your Assigned Tasks
1. Open Applications menu
2. Open My Work application
3. Click on My Assignments in left-hand navigator to view tasks

Note: People with a large volume of projects and tickets assigned to them, we recommend creating a custom report on your desktop as a better solution.

Creating a Task Template
A task template is a pre-defined series of tasks used regularly. To have a task template created please contact a TeamDynamix Administrator.
Ticket Reports

Viewing Standard Ticket Reports

1. Open Tickets application
2. Click on Standard Reports in left-hand navigator

The following are examples of commonly used standard reports in the TeamDynamix Tickets application:

1. **Ticket Aging**
   Ticket age in Days and Priority

   **Ticket Aging Report (1364)**
   
   ![Ticket Aging Report](image)

   - > 90 Days: 464
   - 61-90 Days: 502
   - 31-60 Days: 52
   - 16-30 Days: 52
   - < 16 Days: 52

   - Low
   - Medium
   - High
   - Critical

2. **Ticket Performance**
   Tickets by Account, Type, and Responsible Person

3. **Tickets Count Report**
   Tickets by Person, Average Days Old, and number of Tickets

*Note:* To build your own custom reports, sign up for the TeamDynamix Reporting class at: ittraining.unh.edu
TeamDynamix Support

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

Register for UNH TeamDynamix Classes
https://ittraining.unh.edu/apps/ssr?action=category&id=33

Search the UNH IT TeamDynamix Knowledge Base
https://td.usnh.edu/TDClient/60/Portal/KB/?CategoryID=130

Submit a UNH TeamDynamix Support Form
https://td.usnh.edu/TDClient/60/Portal/Requests/ServiceDet?ID=120