Technician Quick Start:
New Work Management Interface

TeamDynamix

Version 1.0

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Overview

This document serves as a quick reference for Technician users on some of the changes they'll see in their frequently used areas of Work Management including:

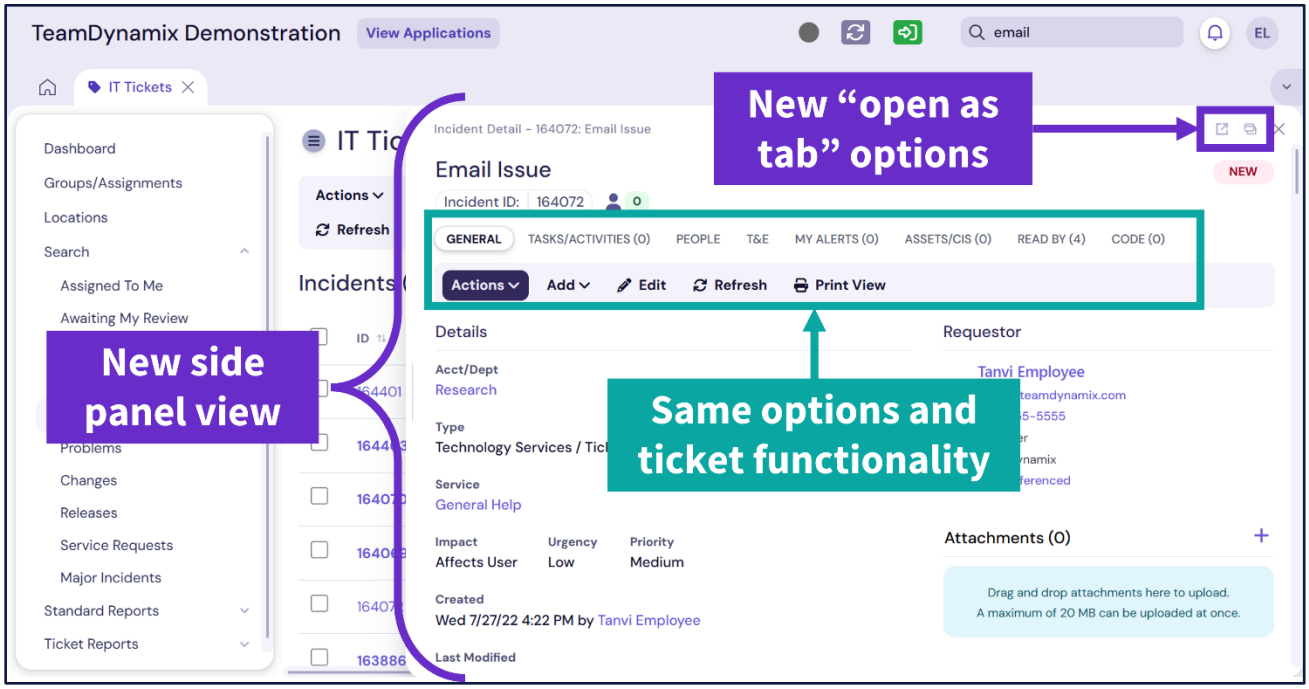
- **Navigating in Work Management**
- **Finding and Organizing Your Work**

What to Expect in the new Interface

While we've introduced some new features and reorganized a few items in Work Management, most of the underlying functionality remains the same.

For example, here is what you can expect from tickets:

- **What's Changing?** Tickets now open in a ***side-panel view*** instead of a new window, and you'll have the option to leave it in that view or open it either as a ***platform tab*** or ***browser tab***.
- **What's Not Changing?** All the other functionality within a ticket.

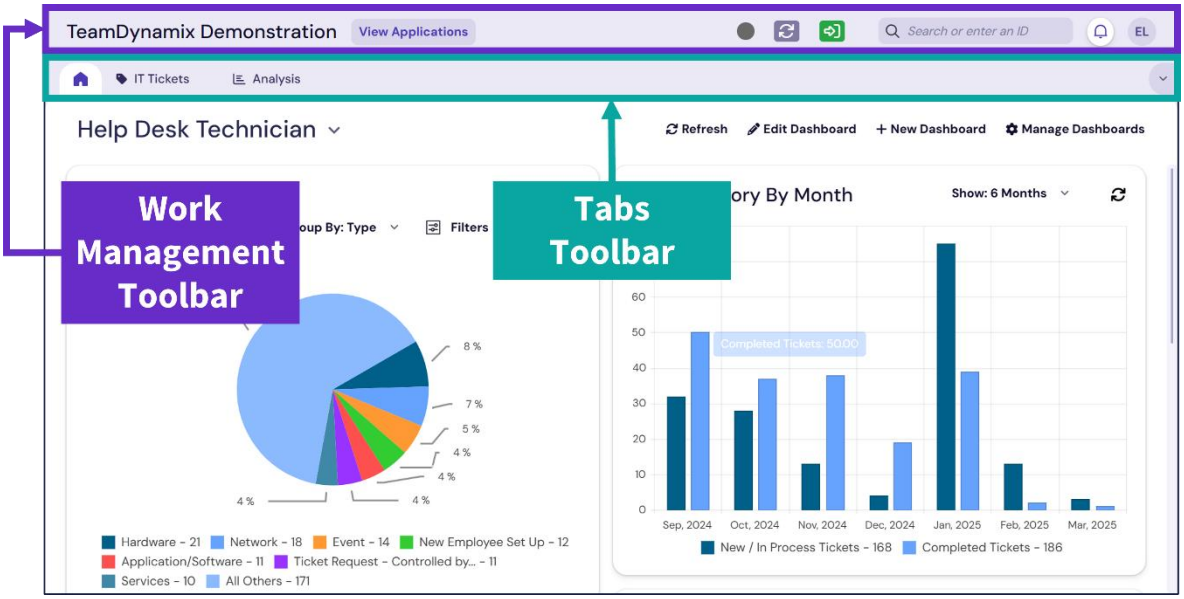


For more product guidance and training, visit these resources:

- **Solutions Portal**: Go here for product documentation and release notes.
  - **Version 12.0 Release Notes**
- **TeamDynamix Learn**: Go here for self-paced product training videos.

Navigating in Work Management

The ***Work Management Toolbar*** and ***Tabs Toolbar*** show up regardless of what page you are on, except for some areas (like Project card walls).

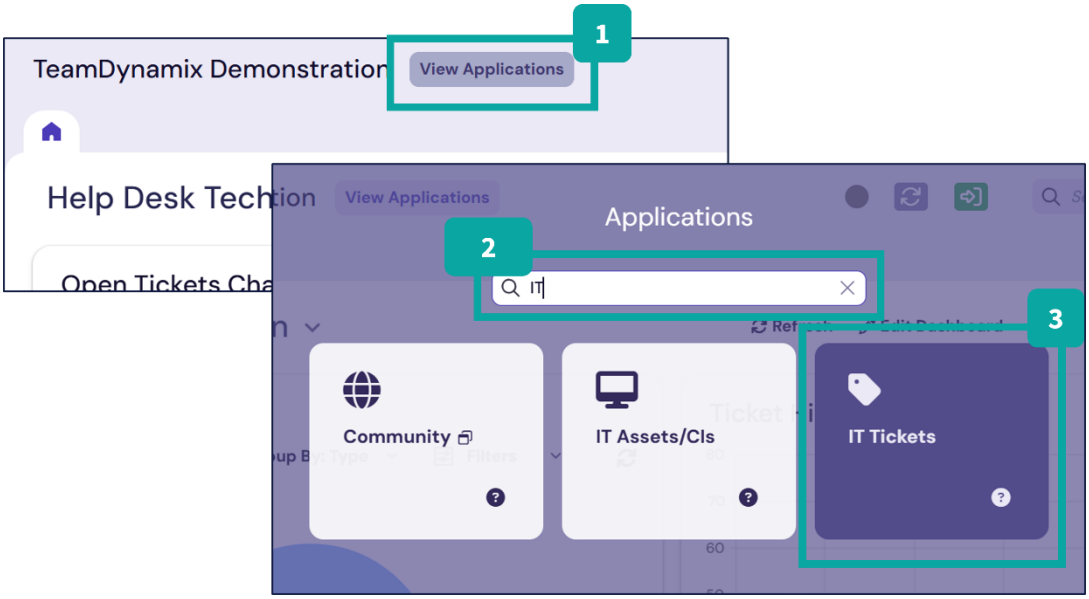


Applications Menu

The Applications menu now appears in the ***Work Management Toolbar***.

To go to different applications:

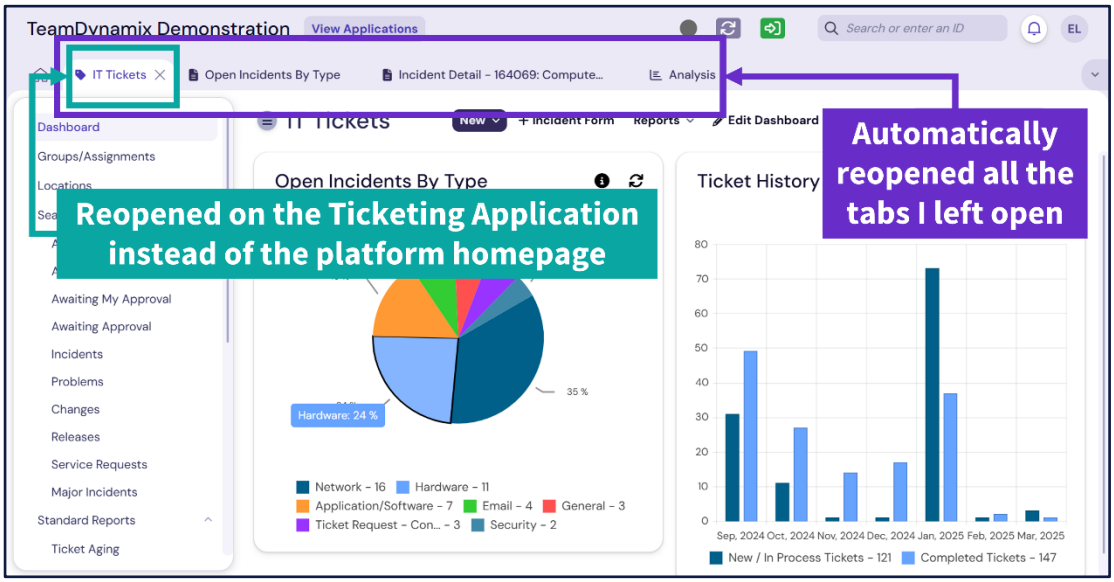
1. In the **Work Management Toolbar**, click **View Applications**.
2. (*Optional*) **Search for** the name of the application.
3. Click the **application tile**.



Platform Tabs

Automatically Reopened Tabs

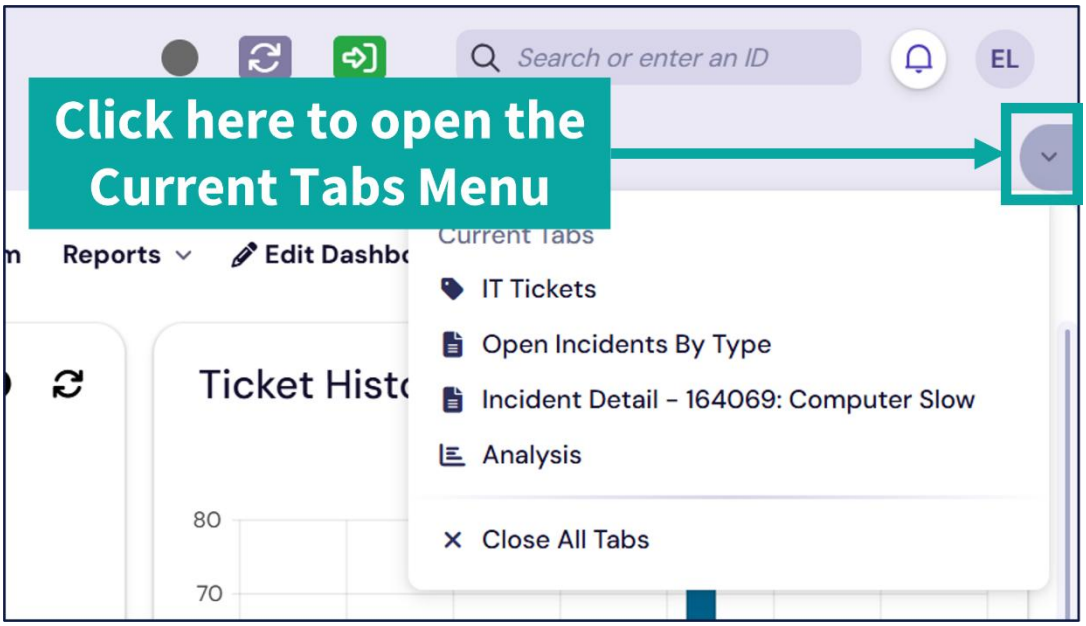
If you leave any tabs open in your last session, the platform will automatically reopen them the next time you access Work Management.



Current Tabs Menu

You can use the ***Current Tabs Menu*** to:

- View a list of your current tabs
- Close all of your open tabs



Finding and Organizing Your Work

My Work

Much like tickets, the underlying functionality in the ***My Work Application*** is staying the same. The only changes are some toolbar items appearing in different areas.

Old toolbar items were on 1 level

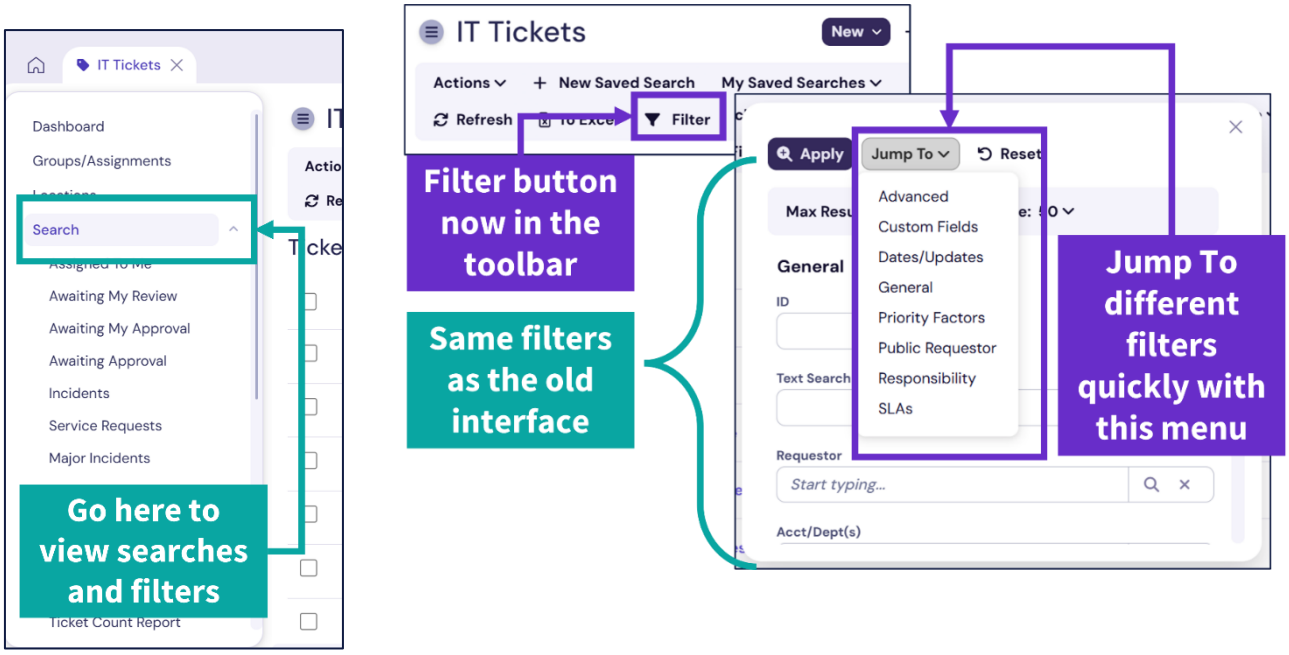
New toolbar items appear on 2 levels

Ticket Application Search

To start a search, go to the **Search** section of the ***navigation menu***.

The ticket filtering options are the same, but here are a few elements we redesigned:

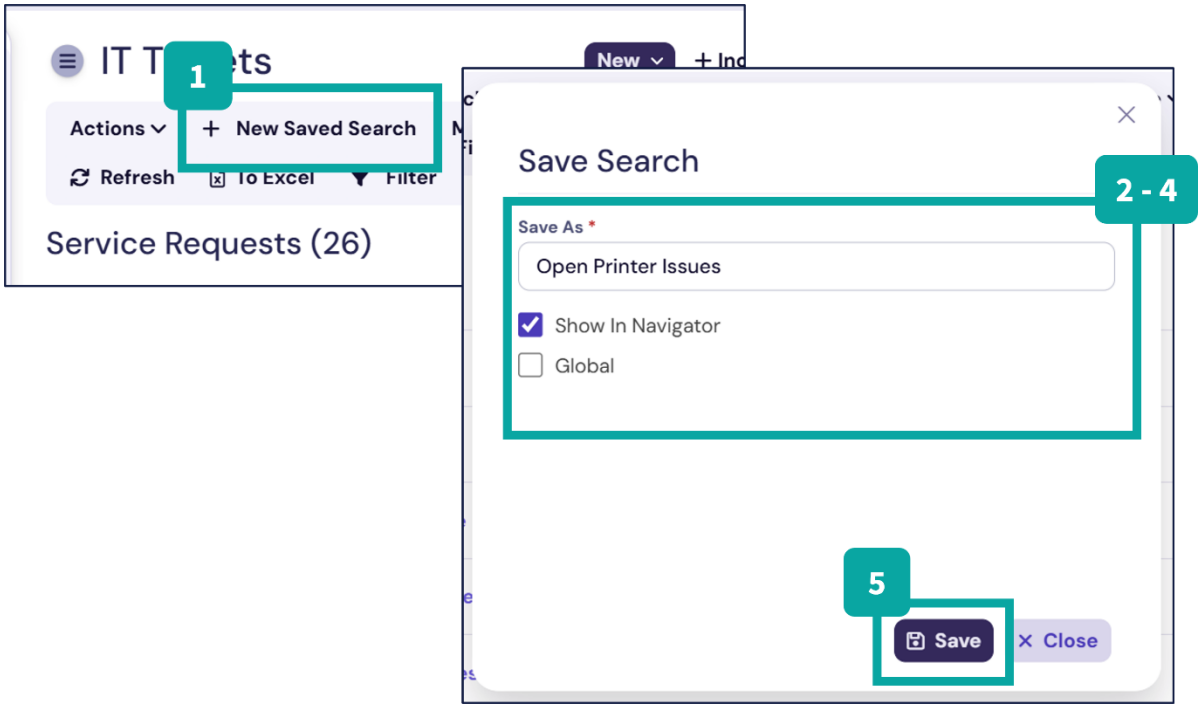
- The Filter button now appears in the Ticketing Application Toolbar.
- It opens as a new window instead of a side-panel.
- You can use the new ***Jump To*** menu to quickly go to different filter types.



Saving Searches

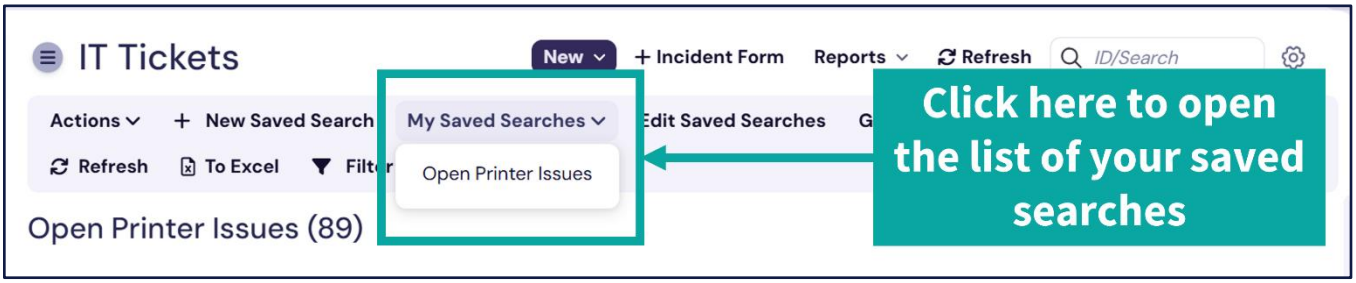
To save a search in the new interface:

1. After you've filtered a search the way you like, click **+ New Saved Search**.
2. Enter the name you'd like to **Save As.**
3. (*Optional*) Enable **Show In Navigator** to see it in the navigation menu.
4. (*Optional*) Enable the **Global** setting to make it available to others.
5. Click **Save**.



To edit one of your saved searches:

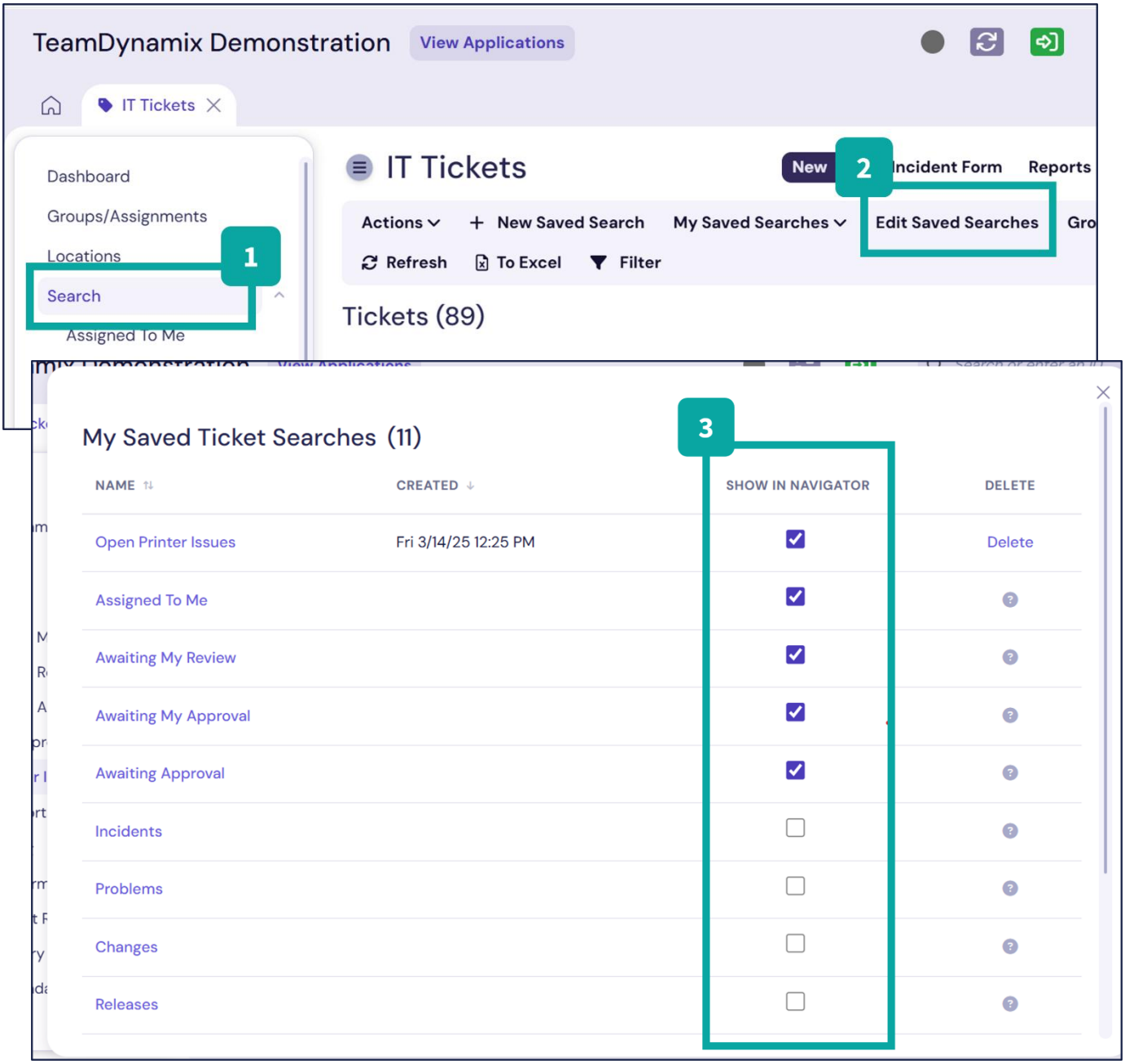
1. In the **Ticket Search Toolbar**, click **My Saved Searches**
2. Select the search you want to edit.
3. Edit the filters as needed.
4. Click **+ New Saved Search**.
5. Enable the **Overwrite** option.
6. Click **Save**.



Customizing Searches in Navigation Menu

To customize the searches that appear in your navigation menu:

1. In the **navigation menu**, go to **Search**.
2. In the **Ticket Search Toolbar**, click **Edit Saved Searches**.
3. Enable the **Show in Navigator** option, based on which saved searches you want to see.
   - The platform automatically saves your selection when you make a change.



Dashboards

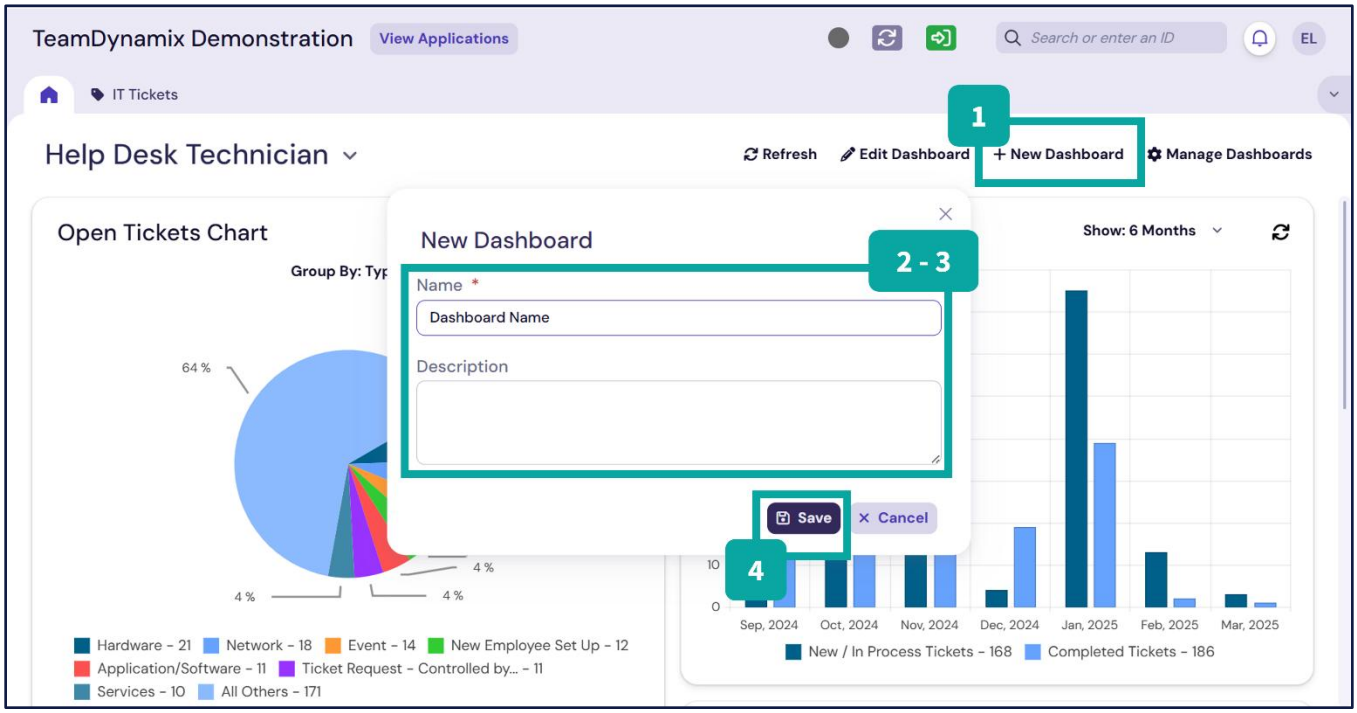
To make it easier to visualize and review report data, we're moving from Desktops to more flexible and user-friendly Dashboards.

- Existing Desktops (including custom reports) will automatically be converted to Dashboards.
  - The new interface supports **Bootstrap 5**. If you used Bootstrap 3 in any of your Desktop modules, we recommend double checking if your code needs any updates.
    - **Example:** "data-toggle" is now "data-bs-toggle"
- Many of the out of the box widgets are now **Dynamic Widgets**.
  - These widgets allow filtering, sorting, grouping, and customizing columns directly in your dashboards.

Creating and Editing Dashboards

To create a new dashboard:

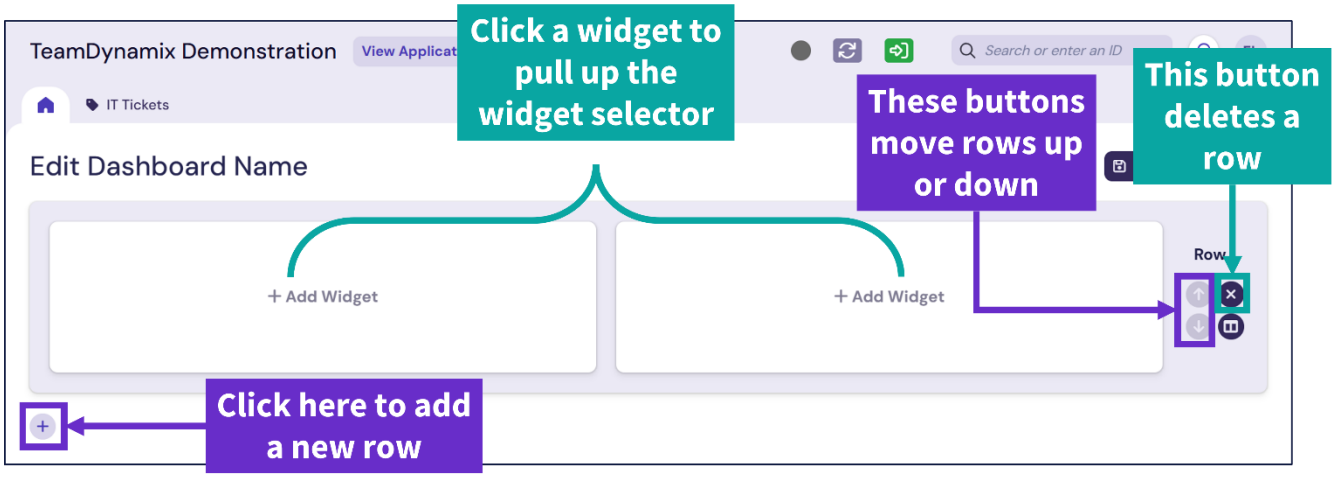
1. From the homepage, click **+ New Dashboard**.
2. Enter a **Name**.
3. (*Optional*) Enter a **Description**.
4. Click **Save**.

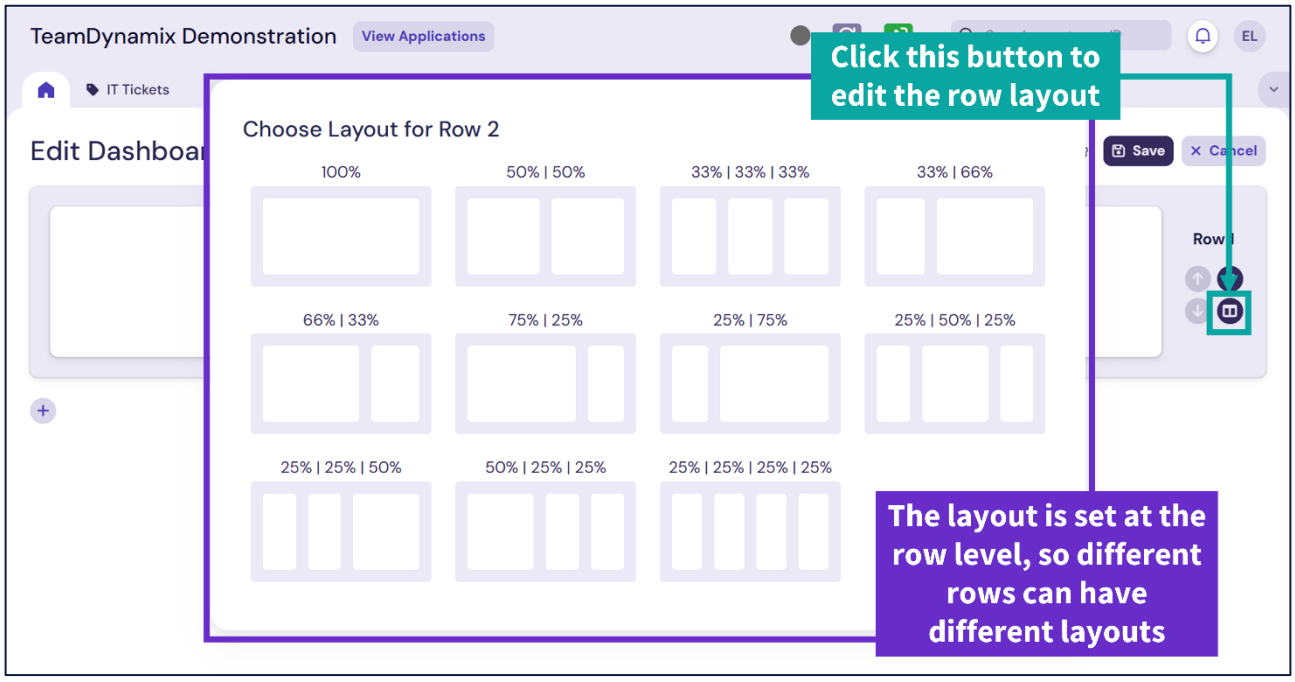


From here, you'll go to the new **Edit Dashboard page**.

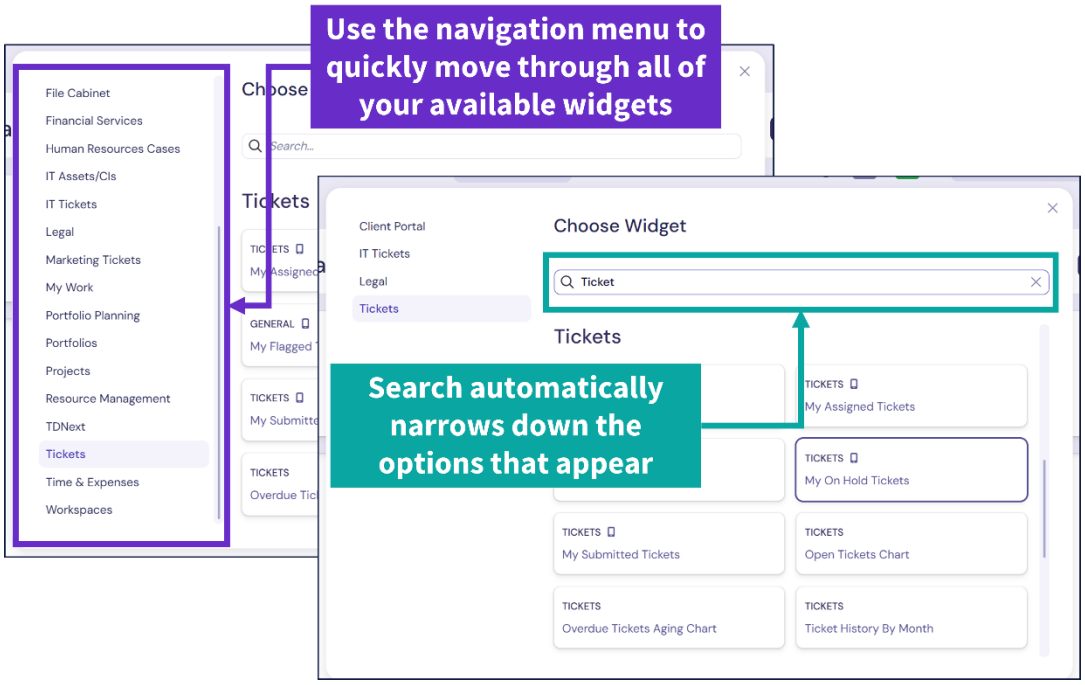
There are more flexible layout options in the editor, so you have more control over the look and feel of your dashboards.

- Dashboards can have multiple rows
- Rows have their own layout options
- The widget selector shows more information
- More dynamic widgets are available





You can use the ***navigation menu*** or the ***Search*** to quickly find widgets.

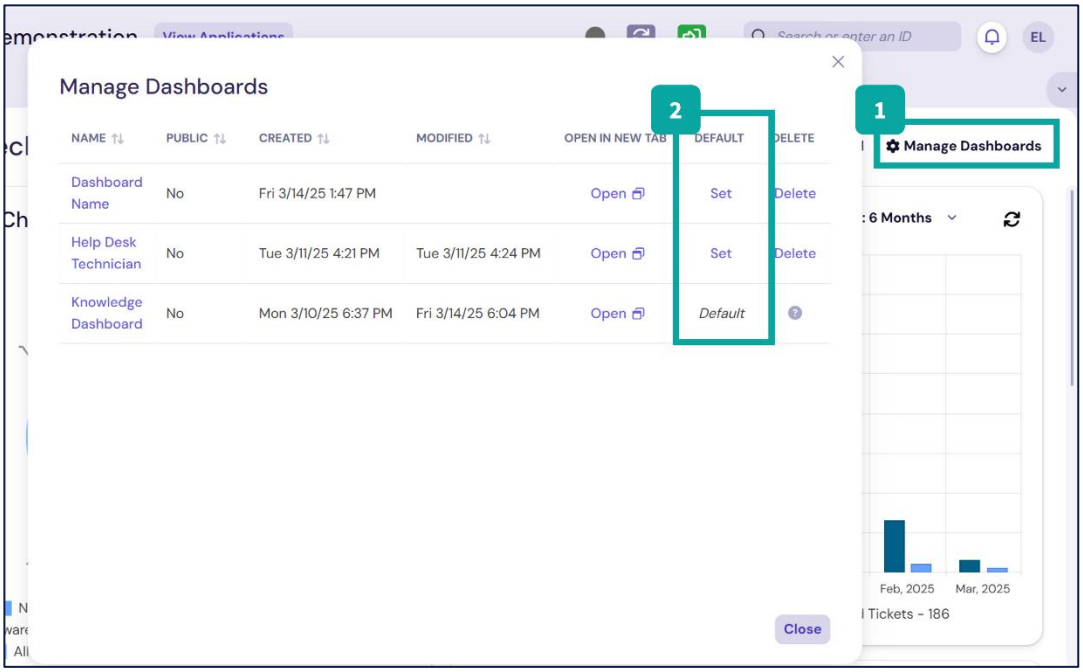


Setting Default Dashboard

The default dashboard will show up on your Work Management homepage.

To mark a dashboard as your default:

1. From the **Work Management homepage**, click **Manage Dashboards**.
2. In the **Default** column, click **Set**.



Managing Ticketing Application Dashboard

In contrast to your platform dashboards, application dashboards are limited to widgets from that application.

To change what shows up on your Ticketing Application Dashboard:

1. Click **View Applications**.
2. Select the ticketing application.
3. Click **Edit Dashboard**.
    - If you don't have a dashboard setup, click **Get Started**.