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INTRODUCING: TeamDynamix

TeamDynamix is a project and portfolio management (PPM) software solution specifically tailored to accommodate the needs of Higher Education, with a simple yet powerful web-based interface, that is platform neutral. This allows users to submit and keep track of project requests. TeamDynamix builds on a familiar project request framework, but delivers significant enhancements to the project request, approval, tracking, and reporting processes. TeamDynamix:

- Enables Project Requestors to submit and track requests
- Allows Portfolio Managers to review requests, and assign and monitor resources
- Includes functionality to automate processes by prepopulating forms and allowing the creation of workflows
- Automates status reports
- Strategic service enabler
- Option to automate survey requests upon project closure
- Centralized project documents repository
- Secure, hosted environment
- Community support
- Browser agnostic
- Adheres to the latest ITIL/ITSM methodology which is the current industry standard

GETTING STARTED

SIGNING UP FOR TEAMDYNAMIX

Please register for access to TeamDynamix using the steps below:

- I. Go to https://american.teamdynamix.com/
- II. Click on the Client Portal button (center of the page)



III. Enter your AU login credentials (username and password) and click on Continue. For the username, simply use your AU username WITHOUT the '@american.edu.'



IV. Upon successful login, your TeamDynamix account will be created and you will see the TeamDynamix Client Portal page.

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os 📑 Facebook (3) 🞯 MSOD Cohort 67 - Go 📗	MSOD Cohort 67 GD 🕜 OC Scribe Tribe - Con	MyBootcamp Online	iDoneThis!!! 🐴 IT Project Services - N	» 🦳 Other book
AMERICAN UNIVERSITY			search services, kb and questions	Q 🔺 Matteo Becchi
Home Projects/Workspaces Servic	es Knowledge Base News Ca	alendar Questions		
PEdit Content				
Weekly Calendar	2 ×	Announcen	nents	æ×
No	Items		No Items	

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V. Once you have successfully logged in, let a representative of the PMO know so they can update your TD account to assign you the correct permissions as well as allow access to the Projects application in TeamDynamix.

<u>Note:</u> Once your TD account is fully provisioned, you will use the **Users** button to log into the system (not the Client Portal)



TEAMDYNAMIX TERMS AND DEFINITIONS

Project:

A project is a requested activity or operation that has a distinct beginning and end and clearly defined scope and resources. A project is unique in that it requires a specific set of operations designed to accomplish a singular goal.

Project Request:

A Project Request is a request for a project that will be evaluated, and will eventually (if approved) be converted to a project.

Project Life Cycle:

A project requires a Project Life Cycle which is a collection of project phases that define:

- What work will be performed in each phase
- What deliverables will be produced and when
- Who is involved in each phase
- How management controls and approves work produced in each phase

Project Categorization:

Projects are measured by person hours (labor hours). Projects are categorized as:

- Small: Greater than 40 person hours and less than 1 month
- Medium: Greater than 1 month and less than 3 months
- Large: Greater than 3 months and less than 9 months
- Mega: Greater than 9 months

Project Issues and Risks:

Identifying issues and risk is your way to ensure quality in the project. All project team members are encouraged to use this tool to communicate issues and risks with the team.

TEAMDYNAMIX TIME TRACKING

TeamDynamix tracks both **Operational** and **Project** time. An **Operational Workspace** has been setup for each team within OIT. The **Operational Workspace** allows the Resource Manager to set the individual team member's schedule and availability. Each OIT member can track hours worked on operational tasks in the **Operational Workspace**. TeamDynamix also tracks overall project time including time spent on project tasks. While TeamDynamix is not a time management system, you are required to report time spent on all tasks related to a project.

PROJECT ELEMENTS

All TeamDynamix projects should include the following Project Deliverables:

- Project Deliverables
- Charter
- Plan
- Risk/Issues Log
- Business Case if applicable
- Requirements document if applicable
- Implementation plan if applicable
- Lessons learned
- Testing Plans
- UAT Sign off

The images below highlights the items required and recommended for each project, depending on project size:

	Pro	oject Deliverables b	y Phase	
Project Phases \rightarrow	Project Initiation	Project Planning	Project Execution	Project Closing
Large Project Deliverables → (Greater than 3 months of effort)	IT Project Request Project Charter uest: http://www.au	Update as necessary Project Plan Project Requirements Risks and Issues Log Status Reports → merican.edu/oit/project	Update as necessary Update as necessary Update as necessary Update as necessary Testing Plan → cts/IT-Project-Request	Lessons Learned Project Sign Off → t-Form.cfm
 All Document https://myau. 	Templates are loca american.edu/dept	ted at the following U /Treasurer/OIT/PMO/Te	RL: emplates/Documents/	Large_Projects/
 Project Ch Project Pla Project Re Risks and I Status Rep Testing Pla 	arter: AU_ an: AU_ quirements: AU_ ssues Log: AU_ orts: AU_ an: AU_	_Project_Charter_Temp _Project_Plan_Template _Requirements_Template _Risk_and_Issue_Log_Te _Status_Report_Templa _Testing_Plan_Template	olate.docx e_Excel.xlsx te.xls emplate.xlsx te.docx e.xlsx	

Project Deliverables by Phase						
Project Phases $ ightarrow$	Project Initiation	Project Planning	Project Execution	Project Closing		
Large Project Deliverables →	IT Project Request Project Charter	Update as necessary	Update as necessary			
(Greater than		Project Plan Project Requirements Risks and Issues Log	Update as necessary Update as necessary Update as necessary			
3 months of effort)			Testing Plan	Lessons Learned		
		Status Reports →	\rightarrow	→		
Medium Project Deliverables →	IT Project Request Project Charter	Update as necessary Project Plan	Update as necessary Update as necessary			
(1 to 3 months of effort)		Project Requirements Risks and Issues Log	Update as necessary Update as necessary Testing Plan			
		Status Danasta ->	2	Lessons Learned Project Sign Off		
Small Project	IT Project Request Form	Status Reports 7	7	7		
Deliverables→		Project Requirements	Update as necessary Testing Plan			
(40)				Project Sign Off		
(40 hours to 1 month of effort)		Status Reports →	<i>→</i>	→		

TEAMDYNAMIX USERS

There are four defined TeamDynamix User Groups at American University.

1. TEAMDYNAMIX Clients

- Request Projects
- Track Project Status
- Serve as Project Resources
- Contribute to Project Feed
- 2. TEAMDYNAMIX Team Members:
 - Update Work
 - Update Assignments
 - Track Project Status
 - Contribute to Project Feed
- 3. TEAMDYNAMIX Project Managers:

- Manage Projects
- Update Projects
- Add and delete tasks and resources
- Change name, start date end date
- Provide weekly status updates

4. TEAMDYNAMIX Portfolio Managers:

- All Project Manager Functions
- Create a New Portfolio
- Conduct Capacity Planning
- Create Portfolio Reports

TEAMDYNAMIX INTERFACE

TEAMDYNAMIX INTERFACE

TeamDynamix Clients will access their request form from the **SERVICE link** on the **IT Project Services** webpage at: <u>http://www.american.edu/oit/projects</u>. Click on the link for the appropriate portfolio your project request belongs to. For the purposes of this training you will click on the link labeled: *Project Request for Office of Information Technology (OIT)*.

TeamDynamix users will access the interface from: <u>https://american.teamdynamix.com/</u>.

1. Click the **Users** icon and, then, enter your American University login credentials.

TeamDynamix The Leader in Higher Education ITSM and PPM Software						Search	Q & SIGN-IN	
HOME	PRODUCTS	SERVICES	ABOUT	SUPPORT	COMMUNITY	CAREERS	CONTACT US	
Sign-Ir	to Team	Junamiy						
Jight I		Jynannx						
To login, you can	also visit the unique web	address assigned to you	ir institution by Team	lynamix (e.g. brown.t	eamdynamix.com).			
		-						
	202		Г			100	E Contraction of the second seco	
						A. 1		
	Users		Client	Portal		Administra	ators	

Next, you'll need to configure your **Project Desktop** and settings.

1. Click the blue **APPLICATIONS MENU** button, in the upper left corner of your screen.



2. Click on the **PROJECT**S application.



3. Click the Edit Projects Desktop link.

American University



- 4. Expand **Projects and Workspaces** in the **Available Content** pane (left side of screen).
- 5. Drag and drop **Announcements** to the **Column 1** pane.
- 6. Click SAVE.

TDPro	iocte	Dec	kto	n
IDPIO	ects	Des	κιο	ρ

Edit Layout	Column 1	Column 2	Column 3	
1 2 3 Available Content * Projects / Workspaces Projects / Workspaces / Files Brietcase	Projects / Workspaces / General Announcements	Projects / Workspaces / Tasks Tasks Summary Chart	Projects / Workspaces / General My Projects/Workspaces Feed	
Projects / Workspaces / Files My Checked Out Files Projects / Workspaces / Files My Pending Approvals				

SYSTEM SETTINGS SETUP

1. Click your name link in the **VIEW MY PROFILE** from the



upper right of the screen and select dropdown selections.

2. You can edit your profile, but please note that you should keep your <u>work email</u> for both the **Primary** and **Alert/Notification** email settings.

TEAMDYNAMIX DESKTOP SETUP

You will need to set up a **NEW DESKTOP** in TeamDynamix.

1. Click the Edit Desktop or New Desktop buttons to create your customized Desktop.

h	
Z	



3. Enter a name for your **Desktop**, then click the **SAVE** button. You'll now need to add TD content widgets to your Desktop.



- 4. Expand **TD PROJECTS** in the **Available Content** column.
- 5. Drag & Drop **PROJECTS / TASKS** to **Column1**, and **TASKS SUMMARY CHART** to **Column 2**.
- 6. Click SAVE.

General	Content				
Available C	ontent	Column 1		Column 2	
My Tasks	•	TDProjects / General	*	TDProjects / Tasks	

VIEWING YOUR ASSIGNED PROJECTS

You will see a list of projects on your **Project Desktop** for which you are a resource. If you are not a resource, you will not see the project listed here.

American University		49°F 8	20 O Chat	Jacqueline Page 1
Desktop Projects My Work Briefcase Workspaces Resource Management CRefresh / Edit Desktop + New Desktop / Manage Desktops				Jacqueline Palumb
Projects 0 C ×	My Assignments			00
Business Intelligence and Analytics Training Project Jacquises Paumo Web 2002.4-197.2013 Work with the Boainess Intelligence and Analytics Team to update and enhance the Boainess Intelligence and Informer trainingmore	Training delivered to stakeholders Researce and Student Success Analysis > Pan > Retention and Student Success Project Pan > Text Comment Update + Add Time	Date(s) Tue 5/5/15 - Fri 5/22/15	Creator Kinil Lobachyov	Add
CIT Tech Expo 2015 Integrating Palumbo Sec. 2015 Sec. 2017 Sec. 11/213 Work with serior management to host a campus-wide OIT Expo highlighting OIT services and staff.	Training Program update Retention and Student Success Analytics > Pan > Retention and Student Success Project Plan > Task O Comment © Update:	Date(s) Mon 4/20/15 - Thu 4/30/15	Creator Kirill Lobachyov	Add
Retention and Student Success Analytics Koil Lobaryov, Victoria Edministra Fill Charley Victoria Edministration Fill VICTA-Fin 73/273 Provide AU Academic Units, Senior Leadership, and Community At-Large with interactive and easy to use information products tomore	Close out Project in TeamOynamix StareFoint 2013 Training Project > Task Comment Duptate + Add Time	Date(s) Mon 7/27/15 - Mon 7/27/15	Creator Sharjil Hasan	Add
SharePoint 2013 Training Project Jacquidine Palumbo Two 1014/14-16710/15 Create documentation, training course, video guides, and endures reference for SharePoint 2013.	Evaluate Testing Results Stareford 2013 Training Project > Task Comment Update + Add Time	Date(s) Tue 5/19/15 - Tue 6/30/15	Creator Sharjil Hasan	Add
Student Planning Video Jacquite Planning 75% Mim 69/0714- Mer 2015 Create a 10-15 minute Student Planning video.	Obtain User Feedback Shure/bint 2013 Training Project > Task O Comment B Update + Add Time	Date(s) Tue 5/39/15 - Tue 6/30/15	Creator Sharjil Hasan	Add
Tasks C X Title Starts Ends Est. Act. PCT	Pilot Complete SharePoint 2013 Training Project > Plan > Sharepoint 2013 Training Project > Task Comment @Unders	Date(s) Tue 5/19/15 - Tue 6/30/15	Creator Sharjil Hasan	Add

The **Project Icons** indicate the status of the project:

• Blue bar – project has not yet been given an status

- Green Square project is on track
- Yellow triangle project is at risk with corrective actions in place
- Red circle project is at risk, but no successful corrective actions are in place



TD WORKFLOW





PROJECT SUBMISSION

Project Managers will access the request form through the **SERVICES link** on the Project Management Office home page: <u>www.american.edu/oit/projects</u>

<u>1 - Submit Project Request</u>

Go to <u>www.american.edu/oit/projects</u> and click on the appropriate portfolio to enter your new project request.

Review Users Guides, FAQ's and other Helpful Information in the Related Links section of this web



1. Select "Users"

TeamDy	namix ^{The Lead}	er in Higher Education ITS	M and PPM Software			Search	Q	🛔 SIGN-IN
HOME	PRODUCTS	SERVICES	ABOUT	SUPPORT	COMMUNITY	CAREERS	CONTA	CT US

Sign-In to TeamDynamix

To login, you can also visit the unique web address assigned to your institution by TeamDynamix (e.g. brown.teamdynamix.com).



2. Log into TeamDynamix Using your AU credentials



3. Fill in the details of your project request; fields with a * are required.

М Аме	RICAN UNI	VERSITY						search ser	vices, kb	and questio	ns	۹	۱ ک
Home	Projects/	Workspaces	Services	Knowledge Base	News	Calenda	r Questior	ıs					
Project P	Requests	Ticket Requ	iests My F	avorite My Rece	nt My /	Approvals	Services A-	Z Sea	rch				
Service (Catalog / Pr	oject Request fo	or Office of Info	ormation Technology (OIT) / Proj	iect Request	for Office of Inf	ormation T	echnolog	y (OIT)			
Proj (OIT	iect R Γ)	equest	t for Of	fice of Inf	orma	tion T	echnol	logy					
🗸 Mar	rk Complete	🖺 Save						+ Hel	р — Н	elp			
Project N	Name 😧 *												
Project N	lame												
Acct/Dep	pt * 😧												
Used to s	specify unde	r which departn	ment in your org	ganization this project	falls								
Start ty	/ping								Q	×			
Sponsor	Name * 😧												
Whoever on the pr	"owns" the oject to begi	project on beha in.	alf of the organi	zation. The person the	at has overa	all responsibi	ity for a projec	t and can a	uthorize	vork			
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Matte	o Becchi x	ar Q *							ų	×			
Mattee Departm Director I	o Becchi x nent Manage level (or abo	er 🕑 * ve) who will app	prove the proje	ct request					ď	×			



Attach files as appropriate

b



1. Once the form is complete, click the MARK COMPLETE button.

Business Case	Mark Complete Save Print	
O General	Technology Project Reg	lest
O University Strategic Goals	By clicking on the "Technology Project Request" abov	e, you will be taken to the page to request the service/project.
O Files	Category	
» Review and Submit	Project Request for Office of Information Technology Project Name* 🗢	(TIO)
	Acct/Dept* ♥	
	Start typing	Q ×
	Sponsor Name* 😒	
	Jacqueline Palumbo 🛪	Q 🗙

4. Review your project request information for accuracy and completeness, then click on Submit



Business Case General University Strategic Goals Files Review and Submit

Complete the Submit process by clicking **OK** ono the warning message that appears:

Te 🗙 📜	
x.com/TDClient/Requests/ProjectRequests/ProjectBusinessCase.aspx?S=08	&RID=YCg5a-nnlkı
DD Cohort 67 G american.teamdynamix.com says:	× oject Services
This action will mark this project request as Submitted. At this point the request will move into the review stage and will no longer be editable. Do you want to continue?	tb and questions
OK Cancel]
My Favorite	
ind to End Training	
d Training	
→ Submit Print	
Canaral	Paqua

The system will confirm that your request was submitted successfully:

	RICAN UNIVER 5 m i n g t o n.	SITY • •					S	earch services, kb and questions	Q
Home	Projects/Wo	rkspaces Se	rvices Knowl	edge Base	News	Calendar	Questions	3	
Project R	lequests T	ïcket Requests	My Favorite	My Recent	My A	pprovals	Services A-Z	Search	
		What	⊘ R do you wa	equest ant to do	su now	bmitte ?	d Suco	cessfully!	
		View f View f View d	the request the service other reque	you just catalog sts	subm	litted			

<u>Note:</u> the Portfolio Manager will receive a notification informing them of this new request. The expected turnaround time for the Portfolio Manager to review and contact the requestor is generally 5 business days after the request has been submitted.

 The client can view the status of their projects from the **RELATED LINKS** section by clicking the *View My Project Requests* link on the website (<u>https://american.teamdynamix.com/TDClient/Requests/ProjectRequests/</u>).

Related Links	
View My Project Requests	
View My Project Portfolio	
Frequently Asked Questions	

You can return to this page to check on the status of your request (see top right corner "In Workflow"):



Project Request Status ranges as follows:

- 1. Not Submitted
- 2. Submitted
- 3. In Workflow
 - a. Initial Request Review
 - b. Determine/Validate Project Requirements and Scope
 - c. Size & Effort Estimation
 - d. Budget Review
 - e. Stakeholder/Process Owner Identification
 - f. Process Owner Review
 - g. Portfolio Manager Approval
 - h. Portfolio Owner Review
 - i. Final PMO Review
- 4. Approved
- 5. Declined

FULFILLING YOUR OBLIGATIONS AS A PORTFOLIO MANAGER

- 1. Receive E-mail Notification
- 2. Review new Request in TD
- 3. Conduct Feasibility and Preliminary Resource Availability Assessments
- 4. Approve Project Request in TD

TeamDynamix Request Workflow Assignment (Access Review)	
Hosein Nahidian <notify@teamdynamixapp.com> Monday, September 19, 2016 at 4:30 PM To: Sharjil Hasan</notify@teamdynamixapp.com>	
Details You are responsible for the current step ("Initial Request Review") in this project request's workflow.	
Project Request Details	
Project Access Review	
Acct/Dept OIT - Enterprise Systems	TeamDynamix Request Submitted (Access Review)
Type General / Portfolio - Office of Information Technology	HNSein Nahidian <notify@teamdynamixapp.com> Monday, September 19, 2016 at 4:30 PM To: Sharjil Hasan</notify@teamdynamixapp.com>
Description Deployment of NetIQ Access Review to allow data custodians auditing and self service capability for granting and reviewing restricted permissions/access.	Details
Workflow OIT Project Approval Workflow	Hosein Nahidian submitted this project request on Mon 9/19/16 4:30 PM Eastern Daylight Time. It was automatically assigned to the "OIT Project Approval Workflow" workflow.
Workflow Step Initial Request Review	Project Request Details
Created Mon 9/19/16 4-28 PM Eastern Davlight Time by Hosein Nabidian	Project Access Review
Evaluator Sharii Hasan	Acct/Dept OIT - Enterprise Systems
Time Frame None Specified	Type General / Portfolio - Office of Information Technology
Budget \$0.00	Description Deployment of NetlQ Access Review to allow data custodians auditing and self service capability for granting and reviewing restricted permissions/access.
TDNext https://american.teamdynamix.com/TDNext/Apps/Portfolios/ProjectExplorer.aspx? RID=IWDWuDLB6c_	TDNext https://american.teamdynamix.com/TDNext/Apps/Portfolios/ProjectExplorer.aspx? RID=I~WDWuDLB6c_

Notification of Request Submitted Assigned to Workflow

New Feature: Ability to Track Time Spent on Project Requests (TD v 9.4)

In previous versions, it was reported that considerable time was spent vetting out project requests and until 9.4 have not had the ability to track that time directly on the request. This problem has been addressed with project request time entry (special thanks to the team at **Boston College** for their contributions assisting in this redesign). Project request time entry works exactly like project time entry, so users will already know how to use it. You will also easily be able to see how much time was spent on the project request phase separately to the time spent once it becomes a project.

TeamDynamix								€ 0	🔉 Chat
Desktop Portfol	io Planning Project	s / Workspaces	Time & Expenses	> × Ticket	s Analysi	s Briefcas	e People	e Calenda	ar My Wo
C Refresh									
Time Entry	🔊 Resubmit	+ Add Time	C Refresh	🖨 Print					_
Submitted Time		Ade	d Time Entr	V					×
Submitted Time	Status Ite	em		/					Hours
Pending Time 24	Adam Test 2.1 22	2 Pro	ject/Workspace Time	Issue Time	e Ticket T	ime Time	e Off		24.00
Expense Entry	Rejected W	orkspace Proje	ct/Workspace *	-					8.00
Pending Expenses	Approved W	orkspace 9.3	- project request co	llaboration - re	quest from to	dpp		Ŧ	8.00
Time Off Calendar	Rejected W	orkspace	Type 🕜 *						8.00
		Soft	ware Development					Ŧ	24.00
This Week: Not Submitted									0.00
Billable 0.0		8	Sun Mon /21 8/22	Tue 8/23	Wed 8/24	Thu 8/25	Fri 8/26	Sat 8/27	24.00
Non-Billable 0.0			0.0 0.0	0.0	0.0	0.0	0.0	0.0	
Total 0.0		Sun 8/ W	ednesday descriptio	n					
Last Week: Not Submitted	Total Hours	0.00							
Billable 0.0									
Non-Billable 0.0	Comments								
Total 0.0									- 60
	Adam adam@	Torres Sa	ve Cancel						~
	Submitt	ted time report.							_

PROJECT APPROVAL

Project Approval by Portfolio Manager

Project requests should be discussed with the Portfolio Owner, and with the requestors, to discuss the scope of work. Once the Portfolio Owner has approved the request, the Portfolio Manager can track their project requests within the Portfolio Planning component of TeamDynamix.

Project Review and Approval for Portfolio Managers

The Portfolio Manager should use the following steps to evaluate a project request that has workflow:

- 1. Click on **PENDING MY APPROVAL** within **Portfolio Planning**.
- 2. Click on the **Project Request name** to open the **Business Case** window. The **Business Case Details** view will show which workflow, and step, the request is in.
- 3. Review the sections on the left side of the **Business Case** window. You can mark the section as complete if it requires no further review.
- 4. Any section marked with an asterisk must be reviewed and marked complete. Any section with a "lock" icon cannot be edited during this stage of the review process.

ACTIVATING A PROJECT

To activate the project, follow the steps below:

- 1. Go to **MY WORK** application.
- 2. Click on the MY MANAGED PROJECTS in the left navigation menu.
- 3. Select the **INACTIVE** option and click on the **SEARCH** icon.



- 4. Click on the project that needs to be active. The Project Details window will display.
- 5. In the **Project Details** window, click the **ACTIONS** icon and select **ACTIVATE**. The project is now activated.



- a Go to My Work application
- b Click on 'My Managed Projects' in the left navigation menu

c Select the 'Inactive' option and click on the 'Search' icon

American University	🥌 36°F	I 0	\wp Chat	🛔 Sharjil Hasan
Desktop My Work 🔻 Projects / Workspaces Analysis Admin File Cabinet				
CRefresh Pedit My Profile + New Event + New Issue				
My Managed Projects (3)				
My Approvals (9) My Managed Projects (9)				
My Assignments 29 Search O Active O Inactive O Both				

4. Click on the project that needs to be activated. The Project Details window will be displayed.

🏐 Project Explorer - 256110: Test fo	r End to End Training - Internet Explorer		o ×
https://american.teamdynamix.co	m/TDNext/Apps/Projects/TeamManagement/ProjectExplorer.aspx?PID=YCg5a-nnlkw_		
Project Details	Actions Update Status Refresh Print		
General University Strategic Goals Risks	Test for End to End Training Project ID: 256110		New
Files Expenses Time Types Role Forecasts Resources Score Card	Status New (New) 0% complete, updated Mon 2/22/16 9:59 AM by Sharjil Hasan The project Test for End to End Training has been activated.		
Score Card Stakeholders Plans Components Workflows Feed Status Chart Baselines	General Acct/Dept OIT - Enterprise Systems Service Project Request for Office of Information Technology (OIT) / Project Request for Office of Information Technology (OIT) Type General / Portfolio - Office of Information Technology	Manager(s) Matteo Becchi becchi@american.edu Primary Manager Sponsor	
	Health		

d 5. In the Project Details window, click the 'Actions' icon and select 'Activate.' The project is now activated.

• • •					
Project Details	Actions Update Status				
General	Activate Apply a Project Template Add Baseline Copy				
University Strategic Goals					
Risks					
Files	Status				

5. Add request to proper Portfolio Year ("current" for this exercise)

Ø Project Explorer - 253687: Colleague Security Class Re... - Internet Explorer × CI. 🗲 🛞 🗷 https://american.teami 🗷 https://american.teamdynamix.com/TDNext/Apps/Projects/Tea 6 ☆ © 🙂 mManagement/ProjectExplorer.aspx?PID=aqDlb1aA94A + Expand All Help - Collapse All Help > Chat American University Project Details Save 🛔 Matteo Becchi Desktop Projects / General General C Refresh / Edit Projects/We Additional Project Information ø Project Budget Project Name * 😵 Scoping & Level of Effort Estim Desktop ~ × Colleague Security Class Redesign (Role Based) Manage Projects/Workspace University Strategic Goals Sponsor 🕇 🙆 Reports Risks Kamalika Sandell 🗙 Q 🗙 Projects/Workspaces Expenses Search Time Types Acct/Dept * 🛛 ated By Created Coll SQL - Computed Columns Role Forecasts OIT - Enterprise Systems × Q 🗙 - Coll SQL - Data Extract - Mail F Resources Service 🔞 O Coll SQL - Data Extract - OCL C Score Card Coll SQL - Data Extract - Rave
 Stakeholders Project Request for Office of Information Technology (OIT) / Project Request for Office of Information Fri 7/18/14 10:21 AM Q 🗙 Coll SQL - Data Extract - Starken Type * 🔞 Fri 6/27/14 10:33 AM 🛕 Coll SQL - HR Fix Process General / Portfolio - Office of Information Technology × Q × A Coll SQL - Payroll Envision Auc Components Fri 6/5/15 4:28 PM A Colleague Security Class Rede: Workflows Portfolio(s) 📀 ▲ Colleague SQL Server Migratic Feed 15-16 OIT × Q 🗙 Tue 7/8/14 5:02 PM Develop framework for Agile F Status Chart O Ferrilli Classification 🕜 Baselines Implement Parchment transc Fri 8/28/15 8:47 AM ~ Improve Network & Server Ma Priority * 🕜 Tue 10/20/15 11:19 AM Matteo - Card Wall ~ Should Do Matteo's Operational Time 20* < 0 e 1 e x≣ 9 -٨ S w 0 3 (1)) **9** ÷ 3: TD

Within your project, click the General tab, scroll down to Portfolio(s) and click on the Search icon

General / Portfolio - Office of Information Technology ×	Q X
Portfolio(s) 😶	6
15-16 OIT \star	(Q ×
Classification 🕑	\bigcirc
Classification V	

Select the portfolio(s) to which your project belongs to by selecting the appropriate check box on the left side, then click on the Insert Checked button, and then click on Save in the prior screen

nttps	//amer	ican. teamdynamix.com /TDNext/Apps/0/Share	d/PortfolioLookupMulti?Key=QvFWi90Mivs_&AC=acb_taluPo	rtfolio&Selected=	=1345,		í
Se	arch	Insert Checked			38 F	Portfolio(s)	1
earc	h						
	ID	Name	Description	Manager	Projects	Requests	
	761	13-14 Academic Affairs		Randy Saba	4	0	
	758	13-14 Development and Alumni Relations Closeout	Portfolio to track closeout of projects from 13-14 portfolio year.	Matt Alshab	1	0	
	759	13-14 Office of Campus Life Closeout		Matt Alshab	0	0	
	760	13-14 Office of Finance and Treasurer Closeout		Matt Alshab	0	0	
	676	14-15 Academic Affairs		Randy Saba	40	0	
	743	14-15 Development and Alumni Relations		Matt Alshab	13	1	
	744	14-15 Human Resources		Matt Alshab	6	0	
	745	14-15 Office of Campus Life		Matt Alshab	13	0	
	651	14-15 Office of Information Technology		Sharjil Hasan	61	0	
	742	14-15 OFT		Matt Alshab	27	0	
	1089	15-16 Academic Affairs		Randy Saba	34	0	
	1280	15-16 DAR		Matt Alshab	13	0	
	1291	15-16 OCL		Matt Alshab	21	0	
	1281	15-16 OFT		Matt Alshab	43	0	
_	1040	15 16 00000		Mark Alabah	17	0	•

Project Explorer - 253687: Colleague Security Class Re... - Internet Explorer

- 🗆 ×

https://american.teamdynamix.com/TDNext/Apps/Projects/TeamManagement/ProjectExplorer.aspx?PID=aqDlb1aA94A_

Project Details	Save + Expand All Help - Coll.	apse All	Help
General	General		
Additional Project Information	General		
Project Budget	Project Name * 🕫		
Scoping & Level of Effort Estima	Colleague Security Class Redesign (Role Based)		
University Strategic Goals			
Risks	Sponsor + 🔮		
Expenses	Kamalika Sandell 😠	Q	×
Time Types	Acct/Dept * 😡		
Role Forecasts	OIT - Enterprise Systems *	Q	×
Resources			
Score Card			
Stakeholders	Project Request for Office of Information Technology (OIT) / Project Request for Office of Information	Q	×
Plans	Type * 🛛		
Components	General / Portfolio - Office of Information Technology *	Q	×
Workflows	Portfolio(s) 🕄		
Feed	15-16 OIT × Colleague SQL Server Migration ×	Q	×
Status Chart			
Baselines	Classification 🔮		
			\sim
	Priority * 🕫		
	Should Do		\checkmark

🙆 Project Explorer - 253687: Colle	ague Security Class Re Internet Explorer
https://american.teamdynamix.c	om/TDNext/Apps/Projects/TeamManagement/ProjectE
Project Details	Save Changes saved.
General	Coperal
Additional Project Information	General
Project Budget	Project Name * 🕫
Scoping & Level of Effort Estima	Colleague Security Class Redesign (Role Based)
University Strategic Goals	
Risks	Sponsor 🕂 🥝
Expenses	Kamalika Sandell 🗙

6. **Project is Scheduled based on Priority and Resources**

Further down on the general tab, select the project start and end dates as appropriate considering your portfolio priorities of demand and supply, and then Save

🖉 Project Explorer - 253687: Colle	ague Security Class Re Internet Explorer –		2	×
https://american.teamdynamix.co	om/TDNext/Apps/Projects/TeamManagement/ProjectExplorer.aspx?PID=aqDlb1aA94A_			
Project Details	Save + Expand All Help - Coll	apse All	l Help	^
General	Project Request for Office of Information Technology (QIT) / Project Request for Office of Information	0		
Additional Project Information	Tochaology (OIT) ::	~	-	
Project Budget	Type * 😢			
Scoping & Level of Effort Estima	General / Portfolio - Office of Information Technology ×	Q	×	
University Strategic Goals		-		
Risks	Portfolio(s) 😧			
Expenses	15-16 OIT * Colleague SQL Server Migration *	Q	×	
Time Types	Classification 🙆			
Role Forecasts			~	
Resources	Drievity * 🖗			
Score Card				
Stakeholders	Should Do		•	
Plans	Start Date * 🛛 End Date * 🖓 Duration			
Components	04/01/201 04/03/2017 522 weekdays			
Workflows	● Apr ∨ 2015 ∨ ●			
Feed	Su Mo Tu We Th Fr Sa			
Status Chart	29 30 31 1 2 3 4			
Baselines	5 6 7 8 9 10 11			
	12 13 14 15 16 17 18 ian-provided, security class structure leveraging a role-based security mo	del.		
	19 20 21 22 23 24 25			
	26 27 28 29 30 1 2			
				\sim

7. Classifies Project as Large // Medium // Small

Scroll down to the very bottom of the General tab to select the project size

Project Explorer - 253687: Colle	ague Security Class Re Internet Explorer		-		\times	
https://american.teamdynamix.co	om/TDNext/Apps/Projects/TeamManagement/ProjectExplorer.aspx?PID=aqDlb1aA94A_					
Project Details	Save Changes saved.	+ Expand All Help	- Collaps	se All Help	,	^
General	Approved Budget Year 😧					
Additional Project Information				\sim		
Project Budget	Baseline Portfolio					
Scoping & Level of Effort Estima						
University Strategic Goals				•		
Risks	Portfolio Year 😧					
Expenses				~		
Time Types	Pank Order					
Role Forecasts						
Resources						
Score Card	Scoping & Level of Effort Estimates					
Stakeholders						
Plans	Assumptions					
Components						
Workflows						
Feed						
Status Chart	Project Size 😧					
Baselines						Í.
	Mega				11	
	Large					
	Small					
<i>(</i>	L					Y

8. Changes Project Status to "In Progress"

From your Project Details tab, click on the Update Status button

Project Explorer - 253687: Co	lleague Security Class Re Internet Explorer		-		×
https://american.teamdynamix	.com/TDNext/Apps/Projects/TeamManagement/ProjectExplorer.aspx?PID=aqDlb	o1aA94A_			
Project Details	Actions Update Status Refresh Print				^
General University Strategic Goals Risks	Colleague Security Class Redesign (R Project ID: 253687	ole	In P	roces	s
Expenses	Status				
Time Types Role Forecasts Resources Score Card Stakeholders Plans	In Process (In Process) 5% complete, updated Wed 6/22/16 12:15 AM by TeamDynamix System Administr Changed health from Green - On track to Yellow - At risk with corrective actions. This project was automatically moved to Yellow health because it had not been up	rator dated in 15 working days.			
Workflows Feed Status Chart Baselines	Acct/Dept OIT - Enterprise Systems Service Project Request for Office of Information Technology (OIT) / Project Request for Office of Information Technology (OIT) Type General / Portfolio - Office of Information Technology	Manager(s) Matteo Becchi@america Primary Manage	c hi in.edu er		

Select "In Process" from the New Status pull-down menu (top of the screen), adjust health and % complete as appropriate, and add in any comments, and notifications you deem necessary to announce the activation of your project:

🥥 Update Project Status - 253687: Colleague Security Class Re Internet Explorer		- 0	×
https://american.teamdynamix.com/TDNext/Apps/Projects/TeamManagement/ProjectStatusUpdate.aspx	PID=aqDlb1aA94A_		
Save			
Colleague Security Class Redesign (Role Based) Project ID: 253687		In Process	
In Process	Issues		
New On Hold Yellow	Open 12/13 (92.31 %)		
Percent Complete 5 %	Closed 1/13 (7.69 %)		
Comments	Tasks		
	Completed 32/205 (15.61%) In Process 40/205 (19.51%)		
	Overdue 41/205 (20%)		
Notification	Not Started		
Notify	85/205 (41.46%)		
Notify Other People	Delayed		

9. Assigns PM

From the Resources tab, select Add Resources from the Actions button (top of your screen)

🙋 Project Explorer - 253687: Co	olleague Security Class Re Inte	ernet Explorer						-			×
https://american.teamdynamia	x.com/TDNext/Apps/Projects/Te	amManageme	nt/ProjectExplorer	.aspx?PID=aqD	lb1aA94A	_					-
Project Details	Actions Refresh	Print									
General	Add Resources					All R	esource Requ	iests	Resou	irce Rep	port
University Strategic Goals	Remove Resources	Delevery Dele	Description of Data	De al	C 1-1-1-		Dill Date		45		
Risks	Shift Schedules	Primary Kole	Requested Role	POOL	Status	Approver	BIII Kate	Api	15	ivia	y 1: ^
Expenses								Req	Sch	Req	S
Time Types	Alec Dhuse	InfoSec Engineer	InfoSec Engineer	Information Security	Current		\$0.00				
Role Forecasts	Andy Squires	System	System	Enterprise	Current		\$0.00				
Resources		Administrator (App)	Administrator (App)	Infrastructure							
Score Card	Rrad Bice	Project	Proiect Manager	Enterprise	Current		\$0.00				
Stakeholders		Manager		Infrastructure							
Plans	Crystal Price	Project	Project Manager	Student	Current		\$0.00				
Components		Manager		Information Systems							
Workflows	Debra Gonski	System	System	Enterprise	Current		\$0.00				
Feed		Administrator (App)	Administrator (App)	Infrastructure							
Status Chart	Eric Weakland	Project	Project Manager	Information	Current		\$0.00				
Baselines		Manager		Security							
	Laurie Ambach	Project Manager	Project Manager		Current		\$0.00				~
	<									>	
			Budgeted			Scheduled			1	Remain	ning
	Currency		\$0.00			\$0.00				\$0	0.00
	Hours		0.00			1,918.05				-1,918	B.05

Type any portion of the name of the PM you want to assign your project to, and click on Search; select your resource, and then click on the Next button.

<i> [2]</i> Project Explorer - 253687: Coll	league Security Class F	Re Internet Ex	kplorer						-	- 🗆	×	
https://american.teamdynamix.	com/TDNext/Apps/Pro	ojects/TeamMar	nagement/Projec	tExplorer.asp	k?PID=ac	Dlb1aA94	1A_					
Project Details	Search Ne	xt Cancel								1 R	esource(s)	
General	Add Resc		(top 1 of 2)									
University Strategic Goals	Add Rest		(tep 1012)									
Risks	Name	fil			●E	mployees	5 O Noi	n Employ	ees OB	Both		
Expenses		C 1 1 1										
Time Types	Pri. Role	Start typing		Q ×	Res	ource Pool	Start	yping		Q	×	
Role Forecasts												
Resources		whose capacity	y is not manage	a								
Score Card	When resources ar	e added to the p	roject, their bill rate	es will also be o	opied ove	er. These pi	roject-leve	bill rates	will not be		×	
Stakeholders	automatically upda	ated by any future	e changes to resou	rce bill rates.								
Plans												
Components	Resource	Pri Func Role	Resource Pool	Reports To	Jul 16	Aug 16	Sep 16	Oct 16	Nov 16	Dec 16	Jan 17	Fe
Workflows	Filemon Palero	Project Manager	Architect*	Joni Snyder	39.10	156.00	154.00	147.00	154.00	154.00	154.00	14
Feed												
Status Chart	* resource assignm	nent requires app	roval									
Baselines												
L	<)	≻
https://american.teamdynamix.co	m/TUNext/Apps/Proje	ects/leamManad	gement/Sch									

Request time for your resource as appropriate for your project (bottom of the window), and then click on the Save button.

Project Explorer - 253687: 0	Colleague Se	ecurity Class R	e Internet f	Explorer					-		×
https://american.teamdynan	nix.com/TDN	lext/Apps/Pro	jects/TeamMa	nagement/Pro	ojectExplorer.a	spx?PID=aqDl	lb1aA94A_				
Project Details	Save	Distribute	Back	Cancel							^
General	Creat	e a Sche	edule fo	or Filem	on Palei	O (Step 2 d	of 2)				
University Strategic Goals											
Risks		Project:	Colleague Secu Based)	urity Class Rede	esign (Role	Project	Dates: We	ed 4/1/15 - Mon	4/3/17		
Expenses			-1918.05								
Time Types	Un	scheduled Hours:	1510.05								
Role Forecasts											
Resources	Description	n									
Score Card											
Stakeholders											
Plans	Notify r	esources that t	hey have been	added							
Components	* One or r	more selected res	ource requires as	signment approva	il.						
Workflows											
Feed	Changing	schedule interval	will not preserve	the date ranges i	n which you've co	nfigured hours. T	he total number	of hours entered w	ill be spread acro	iss the	
Status Chart	complete	project date rang	e when the interv	al is changed.		inguica nouisi n			in be spread dere		
Baselines	Resources added by	can only be notif the resource poo	fied of being adde I approver during	ed if they do not the approval pro	require resource a cess.	pproval. If a resou	irce requires resc	ource approval, the	y can be notified	of being	
	Schedule	can be edited eith	her in terms of ho	urs or percent of	capacity. Use % to	allocate percent	of resource's cap	acity (e.g. 50 %).			
	 Months 	s O Weeks									
		Jul 2016	Aug 2016	Sep 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 201	
	Capacity	147.00	161.00	154.00	147.00	154.00	154.00	154.00	140.00	161.0	
	Available	39.10	156.00	154.00	147.00	154.00	154.00	154.00	140.00	161.0	
	Schedule	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	~

** Once the resource's manager approves your resource request you will see that resource's name appear in the Resource tab of your project, with a Role of Project Manager. **

FULFILLING YOUR OBLIGATIONS AS A PROJECT MANAGER

SETTING UP THE OPERATIONAL WORKSPACE

The **Operational Workspace** is used to set an individual's schedule by specifying hours or percent of a resource's capacity that will be allocated for production support. This will reduce a resource's capacity available for projects by the number of hours or percent specified. It is essential for the **Operational Workspace** to be set up <u>prior</u> to assigning resources or tasks to a project.

- 1. Go to the Workspaces Application.
- 2. Click on MANAGE WORKSPACES in the left navigation pane.



- 3. Click the Workspace you would like to edit.
- 4. In the selected Workspace pop-up window click the MEMBERS tab.

000		Workspace Memb	bers – Project Managen	nent Office (Ry
Project M Workspace ID: 22649	anagemer	nt Office (PMO) - Operatio	ns 14-15		Active
Details	Gener	al Members	Workflows	Time Accounts	Ticket Types	
Actions	Refresh					3 Members
Sea	rch			Latest Scheduled Date	e from - to	
Resource P	ool	Q ×		Page Siz	e 30 🛟	
Group By 🗘	🔘 Next Users 🔘 C	Client Users 💿 Both				
Member	Client Scheduled	Title	Resource Pool	Compan	y Added	Status
Ann Parambil	No	Project Manager	Project Manage	ment Office Americar	University Mon 8/25/14 1:07 P	M Active
Matteo Becchi	No	IT Project Manager	Project Manage	ment Office Americar	n University Mon 8/25/14 1:08 P	M Active
🗹 Sharjil Hasan *	No	Director, Project Management	Office Project Manage	ment Office Americar	n University Mon 8/25/14 12:55 l	PM Active

- 5. Select the individual whose schedule you want to edit by selecting the checkbox in front of the name.
- 6. Click the **ACTIONS** button and select **SET SCHEDULE**.

Details	General	Members
Actions Ref	resh	
Add People		
Remove People		
Change Owner		Q X
Set Schedule	rs 🔾 Client Us	ers 💽 Both
View Schedule		

7. Specify the time as Hours or as a Percent of Resource's Capacity.

Jet Jene	uule i		arjii me	dSdff								
Enter time as												
• Hours												
O Percent of P	course's C	anacity										
Fercencorra	esources c	apacity										
	sources c	apacity										
Resource(s)	esource's c	apacity										
Resource(s)	Sep 14	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 1

8. Click SAVE.

APPLYING A TEMPLATE TO THE PROJECT

During the conversion process to a project, you can specify a **Project Template**. It is important to note that you can only apply a template at this time in the project process. Once the project has been created, you cannot go back and apply a template. Templates allow you to include a started project plan, set of issue categories, briefcase structure with documents and more. OIT has two sets of Project Templates: one for large projects, and one for small/medium projects. To apply a template to a project:

- 1. Click **PROJECT DETAILS** in the navigation pane.
- 2. Click ACTIONS, and, then, select APPLY A PROJECT TEMPLATE.

+ 1	New Q Search				
^	Project Details	Actions Update Status	: Refresh Print		
	General	Deactivate	Training Project		
	University Strategic Goals	Apply a Project Template	fraining Project		
	Risks	Add Baseline			
	Expenses	Close			
g	Time Types	Acct/Dept OIT - IT Customer Service			

3. Click the **SEARCH** button. Select the **OIT Project Template**. You can also deselect any parts of the Project Template that you do not wish to use, for example the **Plans**.
| OIT Project Template | Q 🗙 |
|------------------------------------|------------------|
| elect the parts of the Project Tem | plate to apply ⊽ |
| Plans Contacts | |
| EL CONdets | |
| ✓ Briefcase | |
| ✓ Briefcase ✓ Issues | |

DRAFT PROJECT CHARTER, UPLOAD TO TD BRIEFCASE

 Where can you find blank versions of the Project Charter?
 Option 1: Sharepoint Site, Project Charter Template – Large Projects https://myau.american.edu/dept/OIT/PMO/Templates/default.aspx

SharePoint Newster Newster Stare BROWSE Files UBRARY Sare Image: Stress Project Sites Image: Stress Project Office Sare document or drag files here Sare Project Sites Image: Project Office Image: Stress Project Office Sare Click the MSWord document link are save the document link are s	ittps.//inydu.din	encan.euu/uept/on/rivio/remplates/uerauit.aspx	
BROWSE FILES LIBRARY OIT Project Office Tim Richards - PM materials · Project Charters o Project Sites Project Office SharePoint Migration Libraries V Name Modified Modified By Document Type Site Pages Counter 2 Shared Documents Project Deliverables Lessons Learned Closed Projects 2013 Project Soura Project Deliverables Project Charter Template - Light Project Documents Project Deliverables Project Charter Template - Light Project Documents Project Deliverables Descons Learned Closed Projects 2013 Project Deliverables Project Deliverables Project Deliverables Project Deliverables Project Deliverables Project Charter Template - Light Project Deliverables Project Charter Template - Light Project Charter Template - Light Project Deliverables Project Charter Template - Light Project C	SharePoint		Newsfeed OneDrive Sites
Off Project Office Tim Richards - PM materials > Project Charters ③ Project Sites Project Office SharePoint Migration Libraries V Name Modified Modified By Documents High Risk Service Asset Network Segmentation Project Shared Documents Project Deliverables Lessons Learned Closed Projects 2013 Project Source Project Charter Template - Light Project Deliverables Project Charter Template - Light Project Charter Temp	BROWSE FILES LIBRARY		🗘 SHA
Project Sites	MAU PORTAL Tim	°™ Richards - PM materials → Project Charters ©	Search this site
Project Office SharePoint Migration Libraries V Name Modified Modified By Documents Templates V Name Modified Modified By Document Type Count 2 Libraries High Risk Service Asset Network Segmentation Project September 5, 2013 Tim Richards Project Deliverables Project Charter Template - Light September 5, 2013 Tim Richards Project Charter Template - Light September 5, 2013 Tim Richards <	Project Sites	(+) new document or drag files here	document link an
Libraries Name Modified Modified By Document Type Site Pages Count = 2 Shared Documents I high Risk Service Asset Network Segmentation Project September 5, 2013 Tim Richards Project Deliverables PP MP Project Charter - Version 1.1 (Final) September 5, 2013 Sharjil Hasan Lessons Learned PM BP Map for current Project Review Process - 6-27 September 5, 2013 Tim Richards Project Documents Project Charter Template - Light September 5, 2013 Tim Richards Project Documents Project Charter Template - Large Projects September 5, 2013 Tim Richards	Project Office SharePoint Migration	All Documents Templates ··· Find a file	save the docume to your desktop.
Site Pages Count= 2 Shared Documents I High Risk Service Asset Network Segmentation Project Im September 5,2013 Tim Richards Project Deliverables Im PPM Project Charter - Version 1.1 (Final) Im September 5,2013 Sharjil Hasan Knowledge Base Lessons Learned Im PPM BP Map for current Project Review Process - 6-27 Im September 5,2013 Tim Richards Closed Projects 2013 Im Project Charter Template - Light Im September 5,2013 Tim Richards Project Documents Im Project Charter Template - Large Projects Im September 5,2013 Tim Richards	Libraries	✓ □ Name Modified By Document Type	
Shared Documents I High Risk Service Asset Network Segmentation Project Image: September 5, 2013 Image: Imag	Site Pages	Count= 2	-
Project Deliverables PPM Project Charter - Version 1.1 (Final) September 5, 2013 Image: September 5, 2013 Image: September 5, 2013 Lessons Learned PPM BP Map for current Project Review Process - 6-27 September 5, 2013 Image: Time Richards Closed Projects 2013 Project Charter Template - Light September 5, 2013 Image: Time Richards Project Documents Project Charter Template - Large Projects September 5, 2013 Image: Time Richards	Shared Documents	📔 High Risk Service Asset Network Segmentation Project 🛛 💀 September 5, 2013 🗌 Tim Richards	
Lessons Learned PPM BP Map for current Project Review Process - 6-27 September 5, 2013 Tim Richards Closed Projects 2013 Project Charter Template - Light September 5, 2013 Tim Richards Project Documents Project Charter Template - Large Projects September 5, 2013 Tim Richards	Project Deliverables	👔 PPM Project Charter - Version 1.1 (Final) 🛛 💀 September 5, 2013 🗌 Sharjil Hasan Knowledge Bas	e
Closed Projects 2013 Project Charter Template - Light Project Documents Project Charter Template - Large Projects Project Social Tim Richards Project Charter Template - Large Projects Project Social Tim Richards Project Charter Template - Large Projects Project Social Tim Richards Project Charter Template - Large Projects Project Social Tim Richards P	Lessons Learned	🚯 PPM BP Map for current Project Review Process - 6-27 🛛 💀 September 5, 2013 🗌 Tim Richards	
Project Documents September 5, 2013 🗌 Tim Richards Knowledge Base	Closed Projects 2013	Project Charter Template - Light September 5, 2013 🗆 Tim Richards	
	Project Documents	Project Charter Template - Large Projects September 5, 2013 🗆 Tim Richards Knowledge Bas	e

Option 2: In the briefcase of newly formed project. <u>This is your best option</u>.



American Universi	ity									I 0	♀ Chat
Desktop Proj	jects / Worksp	aces 👻 🗶 My Work									
😂 Refresh 🛛 🖋 Edit Projec	cts/Workspace	s Desktop + New	L Search								
Desktop		search briefcase	Adv. Search	+ New	Security	C Refresh	🛓 Download Folder	Fol	der Actions		
Manage Projects/Worksp	baces	🚽 My Checked Out Files		*	Name			Size	Created By	Modifie	ed By
Reports		🚔 My Files		*	AU_Implemen	tation_Plan_Ten	iplate.xlsx	26 KB	Sharjil Hasan	Sharjil H	lasan
Projects/Workspaces		Recent Files Click th	e download		aU_Project_Ch	arter_Template	docx	54 KB	Sharjil Hasan	Sharjil H	lasan
Search	×	Folders docum	ent	*	AU_Project_Le	ssons_Learned_	Template.ppt	234 KB	Sharjil Hasan	Sharjil H	lasan
 Multi-factor Authenticati 	tion (MFA) Im	🔄 Notes		*	X AU_Requirem	ents_Template.x	s	46 KB	Sharjil Hasan	Sharjil H	lasan
Manage		Project Documents		*	AU_Testing_Pl	.an_Template.xl	5	56 KB	Sharjil Hasan	Sharjil H	lasan
leam Feed		Project Templates		*	AU_UAT_Sign	Off.doc		42 KB	Sharjil Hasan	Sharjil H	lasan
Announcements		Small_Medium Proj	ects				To add files, drag an	id drop the	m anywhere on	he screen.	
Briefcase											
Calendar							Open or S	ave a	blank ver	sion of	
Contacts							document	t to yo	ur deskto	p	
Issues								1			
Links									7		
Plans	Dhaa										
A Test for End to End Train	ning Do you	want to open or save AU_Proje	ct_Charter_Template.do	сх (53.0	KB) from american	.teamdynamix.	com? C	Dpen	Save 🔻	Cancel	×

2. Project Charter Table of Contents

Table of Contents

The Table of Contents lists all the templatized sections that are required for each charter.

1. INTRODUCTION
2. ROLES AND RESPONSIBILITIES
3. MILESTONES AND DELIVERABLES
4. PROJECT CHARTER ACCEPTANCE
5. DOCUMENT MANAGEMENT
5.1. VERSION CONTROL
5.2. DISTRIBUTION
5.3. DOCUMENT NAME AND LOCATION
6. EXECUTIVE SUMMARY
6.1. PROJECT GOALS AND OBJECTIVES
6.2. PROJECT RATIONALE
6.3. IMPACT STATEMENT
6.4. SCOPE
6.5. OUT-OF-SCOPE
6.6. RISKS ANALYSIS
6.7. PROJECT APPROACH
6.8. PROJECT CRITICAL SUCCESS CRITERIA
6.9. BUDGET AND RESOURCES
7. DOCUMENTATION RETENTION (OPTIONAL)

3. Each section of the blank charter template will have an explanation of its required contents

1. Introduction

The Project Charter defines the scope, objectives, and overall approach for the work to be completed. It is a critical element for initiating, planning, executing, controlling, and assessing the project. It should be the single point of reference on the project for project goals and objectives, scope, organization, estimates, work plan, and budget. In addition, it serves as a contract between the Project Team and the Project Sponsors, stating what will be delivered according to the budget, time constraints, risks, resources, and standards agreed upon for the project. Changes to scope will affect constraints such as time, cost, etc.

6.1. Project Goals and Objectives

Project Goals and Objectives identify the most significant reasons for performing a project. Goals should describe improvements this project is expected to accomplish along with who will benefit from these improvements. This section should explain what various benefactors will be able to accomplish due to the project.

Check box or Link to university's strategic goals and objectives Pilot Projects....

6.2. Project Rationale

Describe the reasons for undertaking this project.

- Is the project linked to the university's overall strategic plan and/or open audit issue?
- How will this request have an impact on students? How will it improve services to students, student retention, etc.?
- How will this request have an impact on staff productivity or innovation?
- How will this project result in improvements to the working environment, workflow improvement, etc.?
- What is the volume of data affected?
- 4. Once you have completed the Project Charter, you will need to upload the file to the Project Briefcase.

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5. Upload the file to the Project Briefcase



HOLD THE PROJECT KICK-OFF MEETING

Basics of the kick-off meeting

- ➔ Who
- ➔ What
- ➔ How
- → When
- → How

Once you have held your kick-off meeting please be sure to upload your kick-off documentation into the TD Project Briefcase.

ADDING A RESOURCE TO THE PROJECT

A Project does not have a status in TeamDynamix unless at least one resource has been assigned to it. To add a resource to a project, the resource must be added to the **Resource section** of the **Project Details** window. It is important to note that only resources that are added to the project will be available within the plan manager for task assignment. If the resource requires approval, it is important to note that the resource will not be officially added to the project until the resource manager approves the resource request. If there is a resource conflict the Project Manager will need to assign an alternate resource or consider a time shift for the project.

1. Click MANAGE PROJECTS / WORKSPACES

2. Click the **PROJECT NAME**.

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Desktop Projects / W	orkspaces - ×	My Work								
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Network Segmentation Phase 2	255904	Multi-factor Authentication (MFA) Implementation	60%	In Process	Green	Tue 4/5/16 10:22 AM	Portfolio - Office of Information Technology	OIT - Enterprise Systems		

3. Click the project name to open the Project Details window.



4. Click the arrow next to the project name to view the sub-headings



6. Click Action then ADD RESOURCE.

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Resources		InfoSec Engineer	InfoSec Engineer	Information Security	Current		\$0.00				4.00
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	Curr	ency	:	\$0.00		\$0	.00				\$0.00
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7. Click **SEARCH** to view all available resources or **FILTER** resources by name, primary role, resource pool and employee status.

Project Explorer - 255904: Multi-face	ctor Authentication	Internet Explorer					• X			
10 https://american.teamdynamix.co	m/TDNext/Apps/Proje	cts/TeamManagement/Proje	ctExplorer.aspx?PID=kitl	37smuJDQ_			6			
Project Details	Search Next Cancel									
General	Add Reso	Add Resources (Step 1 of 2)								
University Strategic Goals					-					
Risks	Name			Employees	○ Non Employees	OBoth				
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- 8. You can "Filter" to find a resource by name, primary role, resource pool or employee status.

8	🥑 Funct	ional Role Lookup - Internet Explorer			x
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	Searc	h			
		Role	Created	Members	
		BI Developer	Wed 3/19/14 3:42 PM	8	
		Business System Analyst	Wed 3/19/14 3:40 PM	5	
		Communication / Documentation	Wed 3/19/14 3:41 PM	1	
		Desktop Support Analyst	Wed 3/19/14 3:40 PM	0	
		Help Desk Analyst	Wed 3/19/14 3:40 PM	2	
		IDM Administrator	Wed 3/19/14 3:44 PM	2	
		InfoSec Engineer	Wed 3/19/14 3:42 PM	5	
		ITS Developer	Wed 7/9/14 9:24 AM	11	
		Network Architect	Wed 3/19/14 3:42 PM	1	
		Network Engineer	Wed 3/19/14 3:43 PM	12	
		Notes Developer	Wed 3/19/14 3:45 PM	2	
		OIT Trainer	Wed 3/19/14 3:43 PM	4	
		Oracle DBA	Wed 3/19/14 3:41 PM	2	
		Participant	Wed 10/30/13 3:08 PM	295	~

9. Click "**NEXT**" and you will notice that your resource has been populated after the search. You will notice the resource's availability for the time frame of the project.

Project Explorer - 255904: Multi-fac	tor Authentication I	internet Explorer							
https://american.teamdynamix.com	m/TDNext/Apps/Proje	:ts/TeamManagement/P	rojectExplorer.aspx?F	PID=ki	itB7smuJDQ_		-		a
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Feed									
Status Chart	* resource assign	ment requires approval							
Baselines									

10. Select a resource by clicking the resource's name and then create a schedule for the resource. Check the box to "Notify resource that they have been added" and then click "Save" to add the resource.

Project Explorer - 255904: Multi-f.	tor Authentication Internet Explorer		x
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Project Details	Save Distribute Back Cancel		^
General	Create a Schedule for Suzanne Ba	arron (Step 2 of 2)	
University Strategic Goals		· · ·	
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	can be notified of being added by the resource pool approver during the	approval process.	
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- 11. In addition to adding resources, occasionally resources may need to be pulled off a project. To remove a resource from a project:
 - Select the **REMOVE RESOURCE** button.

- Select the resource to remove and also select a resource to delegate project resource to. When a resource is removed, any tasks that resource owns in a project plan will be reassigned to the **Delegate To** resource.
- Select whether or not to associate the materials to the new resource. Then, click the Remove Resource button. If you choose to delegate the materials, project documents, issues, contacts, etc. will be delegated to the new resource. Otherwise, these items will be deleted. It is important to note that project tasks will not be deleted and will always be delegated to the new resource.

<pre>{emove/Delegate*</pre>	
Pamula Tyler	(A.)
Delegate To	
Jacqueline Palumbo	τ.
Action	
Remove person and delete all associated	l materials
Remove person and delegate associated	materials to another person

ADDING NON-OIT STAFF TO A PROJECT

Clients (non-OIT member AU Staff) will need to have a Client account created before they can be added to a project in TeamDynamix. You will need to obtain the person's name, email address, phone number and the project role and submit the request to the OIT Help Desk so that access may be granted to the project application. Once their account is created, add them to the project. Client users will need to follow the steps below to access TeamDynamix:

- 1. Go to https://american.teamdynamix.com
- 2. Click SIGN IN.
- 3. Click CLIENT PORTAL.
- 4. Log into TeamDynamix using your AU credentials.

ADDING A CONTRACTOR AND/OR VENDOR TO A PROJECT

A contractor and/or vendor will need to have a Client account created before they can be added to a project in TeamDynamix. You will need to obtain the person's name, email address, phone number and the project role and submit the request to the OIT Help Desk so that access may be granted to the project application. Once their account is created, add them to the project, then have them follow the steps above.

DEFINE PROJECT REQUIREMENTS, POST TO TD BRIEFCASE

As one of the first steps in project planning phase, project requirements must be defined and added to TD project documents.

Project requirements document is required for all size of project from small to large, as one of the main project deliverables.

A template can be found and downloaded from project briefcase.



Accordingly, after gathering the project requirements with the project team, it can be uploaded to briefcase as part of the project deliverables documents, by clicking on NEW button and choosing "file from my computer" and upload the completed requirements document.

American University			🖉 New File - Internet Explorer	seinvand
Desktop Projects / Work	spaces 👻 🗶 My Work Briefcase Time &	Expenses File Cabi	100 https://american.teamdynamix.com/TDNext/Apps/Projects/Briefcase/FileNew.aspx?fid=94365872-fd	
C Refresh 🕜 Edit Projects/Workspace	ces Desktop + New Q Search		Upload	•
Briefcase	search briefcase Q Adv. Search	+ New 🔒 Security	Add File(s)	1 file
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Links Plans	Folders		A maximum of 200 MB of content can be uploaded at one time.	
Retire Novell File Servers	Box Documentation		Notification	
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Feed	a 🔄 Documentation		Comments @	
Announcements	Paola Documentation			
Briefcase	📁 project Deliverable			
Calendar	🔚 Large Projects			
Contacts	Small_Medium Projects			
Issues				
Links			1	

ADDING A PROJECT PLAN, MANAGING TASKS, TIMELINES AND DEPENDENCIES

Develop Project Plan in TD, tasks, resources, timelines and dependencies

Once a project request has been approved by the Portfolio Owner you will find it under **PROJECTS** on the TeamDynamix **Desktop**. A sample plan will be applied to the Project, unless you deselected this option. You can choose to update the sample plan, delete the plan and start over by creating a new plan, or import a Microsoft Project XML file to use as the project plan.

The process of converting a **project request** to a **project** includes updating the project plan, looking for the availability of resources, determining project dates, and assigning resources to the project.

1. Click on the Project name to open the **Project Details** window from the Desktop. You will see the default settings that created by the Portfolio Owner.

Project Explorer - 229318: ShareP	oint 2013 Training Pr Internet Explorer	
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Project Details	Actions Update Status Refresh Print	^
General	SharePoint 2013 Training Project	
University Strategic Goals	Project ID: 229318	- No Status
Risks	General	
Expenses		
Time Types	Acct/Dept OIT - IT Customer Service	Manager(s)
Resources	Service	
Score Card	Project Request for Office of Information Technology (OIT) / Project Request for Office of Information Technology (OIT)	jpalum@american.edu
Stakeholders		
Plans	l ype General / Portfolio - Office of Information Technology	
Components	Portfolio(s)	Sponsor
Workflows	 14-15 Office of Information Technology (Sharjil Hasan) 	1
Feed	Description	Jacqueline Palumbo
Status Chart	Create documentation, training courses, video guides, and endures reference for SharePoint 2013.	
Baselines	Shirt on coust	
	Priority	
	Should Do	
	Status	
	- No Status [No Status]	
	0% complete, updated on Tue 10/14/14 4:42 PM by Sharjil Hasan	
	Converted Project Request with status of Requested to Project with status of No Status.	

- 2. You can also access this information by taking the following steps:
 - a. Click on the **PROJECTS** tab.
 - b. Click on Manage

American University		4	► 64°F	☑ 0	р (I
Desktop Projects • ×	My Work Briefcase Wo	rkspaces			
CRefresh 🖋 Edit Projects Desktop 🕇	New Q Search				
Desktop	Project Details	Actions Update Status Refresh Print			
Manage Projects	General	ShareDoint 2012 Training Project			
Reports	University Strategic Goals	Project ID: 229318			
Projects	Risks	General			
 Business Intelligence and Analytics Trai 	Expenses				
 CommonSpot v.9 Upgrade Training Pr OIT Tech Expo 2015 	Time Types	Acct/Dept OIT - IT Customer Service	N	/lanage	er(s)
- OIT Training You Tuby Channel	Resources	Service			laceu
- Private Team 🚯	Score Card	Project Request for Office of Information Technology (OIT) / Project Request for			ipalum(
Select an IT Service Management Solut	Stakeholders	Office of Information Technology (OIT)			21
- SharePoint 2 Training Project	Diane	Туре			
Manage	Plans	General / Portfolio - Office of Information Technology			
Team	Components	Portfolio(s)	S	ponso	r
ream	Workflows	 14-15 Office of Information Technology (Sharjil Hasan) 			

3. Click **PLANS**, then click the**SAMPLE PLAN.**

General	Plans (1)								
University Strategic Goals									
Risks	Title	Tasks*	Starts	Ends	Created By	Created	Published	Est Hrs	Act. Hrs
Expenses	Sample Project Plan - Name & Project ID	64 Tasks	Wed 10/15/14	Thu 10/16/14	Sharjil Hasan	Tue 10/14/14 4:42 PM	No	0.00	0.00
Time Types								0.00	0.00
Resources									
Score Card	Task count does not include pa	arent tasks.							
Stakeholders									
Plans									

4. Click CHECK OUT to edit the plan.

	Plans	List	Gantt	Details Fe	ed Cale	endar	Priority	Resources	Custom View	Backups	Tickets	Burndown		0
Sat	ve 🔒 P	Refresh Check Out Print + Manage	≟ Export *	 Expand → Collapse → 	 Cut Copy Paste Clipboard 	Find:	ıde hidde	n tasks in resu Search	Next Prev					
					2015									Plans (1) .
embe	er	October SharePoi	N. sember nt 2013 Trainin	December g Project	Januar	y Fe	bruary	March	April	May	June	July	August	□ Include Inactive + Q
		I												Sample Project Plan - Name &
	WBS	Icon	s Title	2			Sta	rt Date	End Date	Durati	Priority	Est Hrs	Act Hrs	Wed 10/15/2014 - Thu 10/16/2014
		0	Sar	nple Project Pla	in - Name <mark>8</mark>	& Project	ID (P W	ed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00	
1	1	0		Project Initia	ation		W	ed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00	

5. Click directly in a field to edit the sample text.

	WBS	lcons	Title	Start Date	End Date	Durati	Priority
		00	Sharepoint 2013 Training Project (Plan Sum	Mon 10/13/2014	Mon 7/27/2015	192 days	None None
1	1	0	Project Definition	Mon 10/13/2014	Mon 11/10/201-	21 days	None None
2	1.1	~	Define Project Plan and Time Frame	Mon 10/13/2014	Mon 10/13/2014	1 day	None None
4	1.2		Develop Project Charter	Wed 11/5/2014	Mon 11/10/2014	4 days	None
6	2		Project Planning and Analysis	Tue 11/11/2014	Tue 1/20/2015	39 days	None

6. Click on **EXPAND** on the **Ribbon** to view all project details.

1	Mans	List	Gantt	Detaile	Faad	Caler	idar	Priority	Resources	Custor	n View
Save	C Re	fresh eck Out nt	 Export • Options 	Expand	• • •	Cut Copy	Find:	clude hidde	n tasks in resu	Next Its	Prev
		Manage		View		Clipboard			Search		

7. You can also click directly in the plan to view the project details.

	Plans	List G	antt De	tails	Feed	Calendar	Priori	ty Resources	Custom View	Backups	Tickets	Burndown	
	() Ref	resh	Print -	E E	Expand +	🐰 Cut	+ Inser	rt 👚 Move Up	♦ Milestone *	- % +	Find:		Nex
Sav	e 🛃 Und	io Checkout	Export	: <u> </u>	Lollapse +	Copy	X Dele	te 🔸 Move Down lent 津 Indent	Story *	Start Soc	oner 🗌 Ind	clude hidden tasks ir	n results
		Manage			View	Clipboard		Ti	asks List			Search	
					2015	5							
ember	00	tober N	lovember	Decem	ber J	January	February	March	April	May	June	July	August
		SharePoint 20	13 Training Pro	oject									
	WBS	Icons	Title					Start Date	End Date	Durati	Priority	Est Hrs	Act Hrs
		0	Sharep	oint Tra	aining Proj	ect (Plan Su	ımmary	Wed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00
1	1	0	4	Project I	Initiation			Wed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00
2	1.1	0		▶ Initia	ate Project	t Request		Wed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00
5	1.2	0		> Asse	mble Proj	ect Team		Wed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00
7	1.3	0		> Deve	elop Proje	ct Charter		Wed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00
10	1.4	0		⊳ Proje	ect Kickoff			Wed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00
12	2	0	4	Project	Planning a	and Analysis	5	Wed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00
13	2.1	0		Deve	elop Proje	ct Schedule	8	Wed 10/15/2014	Thu 10/16/2014	2 days	None	0.00	0.00

8. Use the **Insert**, **Delete**, and **Move Up** and **Move Down** buttons to customize the project plan, or rightclick for a full menu of options.

	S	harepoint 201	3 Training Project	3	Task Details				
	WBS	Icons	Title		Update		End Date	Durati	Priority
		00	Sharepoint 2013 Traini	2	Comment	4	Mon 7/27/2015	192 days	None
	1	0	Project Definition	*	Cut Text	4	Mon 11/10/2014	21 days	None None
	1.1	~	▲ Define Projec		Copy Text	4	Mon 10/13/2014	1 day	None
	1.1.1	~	Define Pro		Paste	4	Mon 10/13/2014	1 day	None
	1.2		🔺 Develop Proj	+	Insert Task		Mon 11/10/2014	4 days	None
	1.2.1	•	Finalize Pr		Add New Child Task		Mon 11/10/201-	4 days	None
	2		▲ Project Planning	×	Delete Task	-	Tue 1/20/2015	39 days	None
	2.1		Develop Proj		Move Up		Sun 11/23/2014	9 days	None
	2.2		🔺 Develop Train	*	Niove Down		Tue 1/20/2015	30 days	None
	2.2.1		Determine		Indent		Fri 11/28/2014	2 days	None
	2.2.2		Prepare Ti	4	Add External Predecessor		Sun 1/4/2015	17 days	None
	2.2.3		Develop S		Baseline		Tue 1/20/2015	11 days	None
	3	0	Project Execution	della la	Unbaseline	8	Sun 11/30/2014	29 days	None
	4	O	Project Closing		Milestone		Mon 7/27/2015	189 days	None
1	4.1	0	Document Le	5	Split into resource subtasks		Fri 10/17/2014	2 days	None None
ß	4.2	0	Recognize Tea	+	Make this Start Sooner		Fri 10/17/2014	2 days	None
			The second	1. 1957	The start starts and a start start start on the start of the start st				

9. Once you are done editing the Project Plan, click **SAVE & CHECK IN**.

10. The **Project Tasks** will display. The **Project Task Icons** display the status of the task:

✓ Task is 100% complete.
Task is started.
O Task is overdue.
♦ Task is a milestone.
▲ Task is delayed because it has a predecessor that is overdue.
🍘 Task has an attachment.
Task has an issue associated with it.

11. You can click the **GANTT** tab on the **Ribbon** to view the plan in Gantt chart format.

IMPORTING A PROJECT PLAN

You can easily import a project plan from an existing Project Template, TeamDynamix file, or a Microsoft Project XML file. Follow the steps below to import a project plan. See screen shots below.

- 1. For your project, click on **Plans** from the left navigation menu.
- 2. Click **NEW** in the menu tab.
- 3. In the New Plan window, under the **"Do you want to create this plan from anything?"** section, select one of the following:
 - Use a plan from an existing Project Template
 - TeamDynamix .TDPlan File
 - Microsoft Project XML

			american.team	dynamix.com		Ċ
American University						
Desktop My Work Proje	cts / Works	paces – ×				
CRefresh / Edit Projects/Workspace	s Desktop	+ New Q Search				
Projects/Workspaces	New	Refresh Print				
Search ×						
Apps Management - Operations	Plans	5 (1)				
AVST Unified Messaging Implem	ID	Title	Туре	Starts	Ends	Created By
Manage	4005000					
Team	1835203	AVST Voicemail Deployment Project Plan	S Waterfall	Wed 9/2/15	Wed 8/31/16	Sharjil Hasan
Feed						
Announcements						
Briefcase						
Calendar	Task cou	nt does not include parent tasks.				
Contacts						
Issues						
Links	1					
Plans						

🚔 american.teamdynamix.com	
Save	
New Plan	
Name *	
Description	
- +0	
Type * 🔮	
Do you want to create this plan from anything?	
Use a plan from an existing Project Template	
IeamDynamix .TDPlan File Microsoft Project YML	
No (Create an empty plan)	
Do you want to check this plan out now?	
Yes () No	

EXPORTING A PROJECT PLAN

You can export a project plan by clicking **EXPORT** on the **List** tab and selecting one of the options.

Pl	ans List	Gantt	Details	Feed	Cale	endar	Priority	Resources	Cust	om View	Backups	Tickets	Burndown
Save	 Refresh Check Out Print * Manage 	Export Export	 Expand snapshot a to Excel to Project > 	l ∓ 🛛 🐰 s .tdplan KML	Cut opy aste oard 2015	Find:	lude hidde	n tasks in res Search	Next	Prev			
tember	October Sharef Sharep	Novem Point 2013 Train Oint 2013 Traini	ber De ing Project ing Project	cember	J	anuary	Febru	ary M	arch	Apri	1	May	June

USING WINDOWS PLAN MANAGER (VS. WEB PLAN MANAGER)

You can Install the Windows Plan Manager from the Downloads App within TD:



Once installed, be sure to update the TDNext URL with the proper AU path:



Alternatively, you can view and manage your project plan using the Web Plan Manager:

Enhanced Web Plan Manager in TD v. 9.4

Version 9.4 TD PPM removes the dependence on Silverlight for managing project plans. This version phases out Silverlight and launches a new version of Web Plan Manager, written using HTML5 and JavaScript. Project users now have Card Wall, Web Plan Manager, and Windows Plan Manager in their toolbox for managing projects. The new Web Plan Manager can be used from any browser on a Mac or PC and runs up to **40%** faster than the Silverlight Plan Manager.

Sta	ndard Pro	oject Testi	ng / Scr	ବ୍ତ (Get a Li	ink	CN	Check	(in	່ວ Undo	Check Ou	Search				۹ ≡
	Collapse	All 👻 I	🗃 Gantt 💌 🔊 Feed 💌		•											
	WBS	Status	Title	, O(ct 11 20 w)15 т	F	s	s	м	Oct '	I8 2015 w т	F	s	s	м
0			Screenshots													
27	8.4.1	~	Provide default feedback filters on initial page los	a												
28	8.4.2	0	Provide default feedback filters on initial page los	a	5											
29	8.4.3	A	Provide default feedback filters on initial page los	a 🤸												
30	8.5	A	Add permission helpers for briefcase actions								5					
31	8.5.1	0	Add permission helpers for briefcase actions - S	F			b									
32	8.5.2	A	Add permission helpers for briefcase actions - D	e			4	-		-						
33	8.5.3	A	Add permission helpers for briefcase actions - Te	e						×						
34	8.6	A	Disable request validation on all Project General/	F						, m						
35	8.6.1	0	Disable request validation on all Project Gen	•												
36	8.6.1.1	0	Audit HTML encoding is properly applied in													
37	8.6.1.2	A	Disable request validation on all applicable	F											Ļ	
38	8.6.2	A	Disable request validation on all Project General	v												>
39	8.7	A	▲ Add selectable/filterable "Benefits" to	Þ												
4																E.

ASSIGNING RESOURCES TO A TASK

- 1. Use the Horizontal Scroll Bar to scroll to the far right portion of the Project Plan screen.
- 2. Click the **RESOURCES** tab to display all the resources assigned to the project.
- 3. Drag and drop the **Resource** in the appropriate task. Multiple resources can be assigned to the same task.

Jacqueline Palumbo (Manager) OIT Trainer	Suzanne B	arron	
Pamula Tyler OIT Trainer	Feed Refresh Print	Working On	Assignments
Suzanne Barron OIT Trainer	Suzanne Barron SharePoint 2013 Trainin Checked in version 2. 2 hours ago Comment Like	g Project / File / Introduction to S	harepoint2010 (1).docx

4. Double-click the resource name to **add** or **remove** a resource to the task or to adjust percentages.

Suzanne Barron [100%];	•
Manage Resources	
🔲 Jacqueline Palumbo	
Suzanne Barron	

You can also change the % assignment of any task to resources using the "% Assigned" slider bar within the task details screen, "Resources" tab:

Save 2 R	ew • • Save & Check In Dpen • D Undo Check Out kefresh Print Manage	• Task Details - Project Plan: Session 1 Session 1 TeamDynamix Training / Project Plan				• ×	
Status	Title Project Plan (Plan Summary)	Task Relationships (1) Rese	ources (1) Work Alert	s Issues Time	Types		
0	Create Training Content (S	Auto-distribute resource assignments	🖨 Print				2%]; Anth
A	Group all Training Content (_				100%];
×	Plan Training Schedule with	Name	Date Assigned	Is Assigned	% Assigned	Est. Hours	alf [100%];
×	Draft and Send Communicat	Matteo Becchi	Thu 5/26/2016		100 %	0.00	alf [100%]
0	Send Calendar Invites for I	Ann Parambil					alf [100%]
A	Review / Validate the 3 Cla	Anthony Wallace					0%];
0	Deliver Training	Cathylynn Metcalf					4.2%]; An
0	4 Team Member Training	Samer Atawneh					2.2%]; An
0	Session 1	Sharjil Hasan					100%];
A	Session 2	Sheila Hosseinvand					5%]; Antł
▲ ₽	Session 3						5%]; Antł
0	Session 4						
0	Session 5						
0	Session 6						
0	Session 7	Total			100 %	0.00	
0	Session 8	This task is 100 % assigned.					
A	PM Training Sessions	Tue 6/28/2016	e //26/2016 21 days None	0.00 3.	00 8 % 0.00 80 +3	Ann Parambil [2	e5%]; Anth

CREATING PROJECT ISSUES AND RISKS

Identifying issues and risk is your way to ensure quality in the project. All project team members are encouraged to use this tool to communicate issues and risks with the team. Note that you can add an existing category, or add one into TeamDynamix for use on this project only.

Definitions:

A *risk* is a potential problem that needs a mitigation strategy to avoid impacting a project's success. A **risk** is an uncertainty with some degree of likeliness to happen.

An **issue** is a function associated with a project that may impede continuation and adversely affect the project. An **issue** is something real, something that has already been encountered and must be dealt with.

- 1. To create a new issue click on **ISSUES** on the **Project** navigation pane.
- 2. Click on **PROJECTS/WORKSPACES**, then select your project from the left hand side.

American University				
Desktop Projects / Works	paces 👻 K	File Cabinet Briefcase My V	Vork Ass	sets/CIs
CRefresh / Kefresh	es Desktop	+ New Q Search		
Desktop	Search			
Manage Projects/Workspaces				
Reports	Man	age Projects/Work	space	s (6)
Projects/Workspaces	Search		A (2)	active 🔘 1
Search 🗶	10		DCT C	<i>C</i> • •
 Digital Marketing Recruiter Initiatives 	ID	Name	PCT Comp	Status
Operational Reports	255155	Digital Marketing Recruiter Initiatives	70%	In Process
- Private Team 🚯				
Project Management Office (PMO)	257734	Operational Reports	70%	In Process
Recruiter Training				
Shorelight MAP Application Intergrati	. 257737	Recruiter Training	30%	In Process
SPExS Modular Masters				
A Test for End to End Training	257708	Shorelight MAP Application Intergration in Recruiter	95%	In Process
 UCM Digital Marketing Project: New Undergraduate Recruiter Implementa 	257712	SPExS Modular Masters	75%	In Process

- 3. Choose Issues
- 4. Click **NEW**.
- 5. Enter a brief description in the **Title** field, and detailed description in the **Description** field.
- 6. Select **ISSUE** for the **Category**. Note: you can add an existing category, or add one into TeamDynamix for use on this project only.

Save	
New Issue	
Title*	
Resource availability	
Category* Issues	
Priority*	
Medium/Low	
Status*	
Open 🔽 🗌 Alert me when this Issue is closed	
Description	
Primary resource is needed on another project.	~

- 7. Complete all the required fields denoted with a red asterisk.
- 8. Click the **SAVE** button; you'll receive a confirmation.
- 9. To create a new Risk, follow the steps above, but select RISK for the Category.

Save	^
New Issue	
Title*	
Training space	
Category* Risks	
Priority* Medium/Low	

10. You can also move an existing issue from your current project to another project



🔟 Move Issue - 97955: Test Issues - Google Chrome	_		\times
https://american.teamdynamix.com/TDNext/Apps/Projects/Issues/Issu	eMove	aspx?T	ID Q
Save Cancel			4
Move Issue			
Created Sun 9/18/16 11:13 AM			
Project/Workspace *			_
			<u> </u>
Title *			_
Test Issues			
Estimated Hours			
Status *			_
Open			<u> </u>
Start Date Due Date			. 1
09/21/2016 09/21/2016			- 1
Priority *			
Low			•
Category *			
			•

WORKING WITH PROJECT TEAMS

- 1. Click on the Project Name in the Navigation Pane of the Project Desktop.
- 2. Click TEAM.
- 3. Click the team member's **NAME** to see the details of what they are working on, their assignments, and their accomplishments on this project. You have the ability to comment or update information from this window.

	Plans List Ga	antt Details	Feed Calen	dar Prior	ity Resources	Custom Vie	ew Back	tups	Tickets B	urndown	
Sa	Ve Gresh Sefresh Sefre	ptions Expan	d ▼ 3 Cut p se ▼ 1 Copy Paste Cipboard	Find:	idden tasks in res	Next Prev					
-	Wallage	View	chipboard		Jearch		1		2015		
	March April	May Ju	ine July	August	September	October	November	Decem	ber Janu	ary Februar	y March April May J
	Select an IT Serv	ice Management Solu	tion for American Univ	ersity							
	11 Service Manag	gement system select	on								
		Start Date	End Date	Durati	Priority	Est Hrs	Act Hrs	%	Rem. Hrs	Predecessors	Resources
	nt System Selection (F	Tue 4/1/2014	Fri 5/15/2015	279 days	None	1070.00	505.00	69 %	336.00		
1	endations & Insights	Tue 4/1/2014	Wed 5/14/2014	32 days	None None	40.00	40.00	100 %	0.00		Terry Fernandez [100%];
2	ndscape	Tue 4/1/2014	Fri 9/19/2014	121 days	None	20.00	10.00	100 %	0.00		Steve Kelly [0%]; Terry Fernandez [0%];
3		Tue 4/1/2014	Mon 9/22/2014	122 days	None None	95.00	80.00	100 %	0.00		Jacqueline Palumbo [0%]; Kelvin Wilson [0%
4	: on RFP	Mon 9/22/2014	Mon 9/29/2014	6 days	None	1.00	1.00	100 %	0.00		Terry Fernandez [100%];
5	P & Provide Feedback	Mon 9/22/2014	Mon 9/29/2014	6 days	None	36.00	0.00	100 %	0.00		Cathy Hubbs [13%]; Eric Weakland [13%]; Ja
6	PCD to Publish RFP	Sun 9/28/2014	Tue 9/30/2014	2 days	None	2.00	2.00	100 %	0.00		Terry Fernandez [100%];
7	of Intent to Bid	Wed 10/1/2014	Mon 10/6/2014	4 days	None	1.00	1.00	100 %	0.00		Terry Fernandez [100%];
-											

CREATING PROJECT ANNOUNCEMENTS

Use the Project Announcement feature to communicate with Team Members.

- 1. Click **ANNOUNCEMENTS**, then **NEW ANNOUNCEMENT** in the navigation pane of the **Project Desktop**.
- 2. Click the **Project Name** in the navigation pane of the **Project Desktop**.
- 3. Type a **Title** for the announcement, then select the project(s). You can choose an expiration date for the announcement.
- 4. If you select **NOTIFY ALL**, every project member will be notified. Therefore, it is recommended that users add this view to the **Projects Desktop**.

USING THE PROJECT BRIEFCASE

The **Project Briefcase** is the central repository for project documents. You can access all documents in the TeamDynamix Briefcase by clicking on the **BRIEFCASE** tab. The **Briefcase** allows you upload and save multiple revisions of a document. You can also notify team members that a document has been added to the briefcase.

American Univ	ersity				
Desktop	Projects	My Work	Briefcase	т х	Workspaces
search briefcase	Q	Advanced Searc	n 🕒 🖬		
By Checked Out File	5				
📙 My Files					
📑 Recent Files					

You can access the **Briefcase** for a specific project by clicking on the **Briefcase link** under the **Project** name.

American University		🖾 65°F
Desktop Projects • ×	My Work Briefcase Workspaces	
Refresh Projects Desktop Projects Business Intelligence and Analytics CommonSpot v.9 Upgrade Training OIT Tech Expo 2015 OIT Training You Tube Channel Private Team Select an IT Service Management S, SharePoint 2013 Training Project Manage Team Feed Announcements Briefcase	Advanced Search Advanced Search My Checked Out Files My Files Recent Files Folders Project Templates	

1. Click on the **ADD NEW** button, it oupload and name a <u>new</u> folder, or, you can open an existing project folder.

earch briefcase	Q	Advanced Search	Đ	•	±	Ø	Ŵ	C	≫	6
Michaeladoutil	-									

- 2. Click the **SINGLE** or **MULTIPLE** upload buttons, . You can also drag and drop the files to move them.
- 3. You can choose to notify team members and that a document was uploaded.

Select users that you would like to notify	
□ Jacqueline Palumbo	
🗌 Pamula Tyler	
Suzanne Barron	
inter Ontional Email Comments	

4. Team members will not be able to publish a file after it is uploaded. Once a file is uploaded, TeamDynamix clients can view the file.

UPLOADING A DOCUMENT

1. Open Briefcase Tab: The Briefcase allows users to store project documents in Team Dynamix.



3. Select the project name from the left navigation pane. Create a folder to store all uploaded documents.



4. Click on upload to select a file stored on your computer.



5. The document uploaded will be stored in the designated folder for other team members to access the contents.

*	Name	Size	Created By	Modified By	Modified
*	Required Project Deliverables.pptx	940 KB	Matteo Becchi	Matteo Becchi	Wed 5/11/16 2:23 PM

To add files, drag and drop them anywhere on the screen.

EDITING A DOCUMENT

You must check out a document prior to editing, in order to utilize the version control feature.

- 1. Double-click the document name.
- 2. Click ACTIONS to view a full menu and, then, select CHECK OUT.

General	Security	Read By	Revision
Actions	Download		
Move			
Сору	ePoint 2	010 \ Introduction to Sharep	oint2010.docx
Rename			
Add to File Cabinet			
Forward			
Delete			

- 3. Once the document is selected, click **DOWNLOAD** to download the document.
- 4. Edit, Save and Check In the document.
 - Note: only one person can check out a document at time, however multiple team members can upload *new* versions of a document to the application.
 - TeamDynamix will hold all document revisions in the **REVISION HISTORY** tab.

DELETING A DOCUMENT IN TEAMDYNAMIX

Click on the file and the File Detail form will be displayed. Under the General tab, click the Actions icon and select Delete. WARNING: DO NOT CLICK ON THE 'TRASH' ICON TO DELETE A FILE. IT WILL DELETE THE ENTIRE FOLDER INSTEAD. A FILE CAN ONLY BE DELETED FROM THE FILE DETAIL FORM. If you accidentally delete a folder, the folder can be restored, but it will require a support call to TeamDynamix.

USING SHAREPOINT AND TEAMDYNAMIX

SharePoint and TeamDynamix may be used in tandem on projects. All OIT Projects should be tracked in TeamDynamix, with documents stored in the Project Briefcase. This allows documents to be checked in and out, and version control to be utilized. If the project includes external team members who do not have a TeamDynamix account, you may also need to use a SharePoint site to review and store documentation.

TRACKING AND UPDATING WORK AND TIME

MY WORK

TeamDynamix automatically stores all assignments for the project in **MY ASSIGNMENTS** on the **MY WORK tab**. It is recommended that you choose to filter your assignments to display in **MY WORK**. To do this:

1. Click ADD next to the assignment you want to add to My Work.

My Assignments (2)			
Group Sort Project		~	Page Size 10 🔽
Show Future Items 🗹 Show Group Assignments 🗹			
Conduct Pilot or Proof of Concept	Date(s)	Creator	Add
Select an IT Service Management Solution for American University > Plan > IT Service Management System Selection > Task	Fri 12/5/14 - Thu 4/30/15	Terry Fernandez	
🔎 Comment 🔳 Update 🔸 Add Time			

2. My Work will display the filtered assignments. You will use the My Work view to update progress.

Evaluate Vendor Presentations & Demos						60 %
Project Select an Π Service Management Solution for American University			Dates Fri 11/14/14 - Fri 12/5/14	Est Hrs 100.00	Act Hrs 12.00	Remaining Hrs 40.00
Percent Complete*						
60						
Time Type	Ho	ours On				
	*	11/12/2014				
	Q					
Documentation Meeting	^					^
Planning Project Work	~					

REPORTING TIME IN THE WORKSPACE

MY TIME CARD

While TeamDynamix is not a time management system, users are required to report time spent on all tasks related to a project. You track hours worked by using **My Time Card**. To track time worked against a project task you will use the **My Work tab**.

- 1. Go to the MY WORK application.
- 2. Click on **MY TIME CARD** in the left navigation menu.
- 3. Then click on the + SIGN under your task



American University

- 3. This provides you a window where you can enter number of hours for the day.
- 4. Add the number of hours for the day for which you are reporting time.

Desktop Projects	/ Workspaces File Cabinet	Briefcase My Work 👻	× Assets/CIs Analys	is People	Document Worl	kflows
CRefresh 🕜 Edit My Profile	+ New Event + New Iss	sue				
My Managed Projects	Submit as Final	Add Time Refresh	Print			
My Approvals	Add Time Entr	ry		×	2016 📆 🔇	Ø
My Assignments					n Mon 18 5/09	Tue 5/10
My Work	Time Type	Sun May 8 2016 - Sat	May 14 2016 🛛 🔊			
My Accomplishments				•		
My Time Card	Sun Mon 5/8 5/9	Tue Wed 5/10 5/11	Thu Fri 5/12 5/13	Sat 5/14	0.00 0.00	0.0
My Schedule	0.0	0.0 💌 0.0 💌		0.0		
My Feed	Wednesday description	on				
My Briefcase						

5. Select the associated **Time Type** using the drop down.

Submit as Final Add Time Refresh Print	
Add Time Entry	× ‡20
🔇 Sun May 8 2016 - Sat May 14 2016 💽	n 18
Time Type 😮	•
Admin Time	0.00
Design Development	
Documentation Implementation	
Maintenance Meeting	

6. Click Save.

Updating Time worked on Project Tasks

Project Team Members need to update progress and time worked on a weekly basis. This information can be accessed by clicking on the **MY WORK** tab.

1. Click on **UPDATE** to update work progress

American Univers	sity		e 0 5
Desktop Pr	rojects / Workspaces File Cabinet Briefcase My Work 🕆 🗶 Assets/CIs Analysis People Document Workflo	WS	
CRefresh Sector My	Profile + New Event + New Issue		
My Managed Projects	6 Refresh New To Do Print		
My Approvals	• My Work (3)		
My Assignments	Add documentation to PM folders	Date(s)	Creator
My Work	Digital Marketing Recruiter Initiatives > Plan > Digital Marketing - Recruiter Initiatives (only) Project Plan > Task	Mon 3/14/16 - Fri 4/15/16	Ann Parambil
My Accomplishments	22		
My Time Card	2 Close Project	Date(s)	Creator
My Schedule	Operational Reports > Plan > Operational Reports - GR Units > Task	Mon 6/13/16 - Mon 6/13/16	Ann Parambil
My Feed	Comment		
My Briefcase	3 Deliver Training Session 1	Date(s)	Creator
	Test for End to End Training > Plan > Project Plan > Task	Fri 6/17/16 - Mon 6/20/16	Matteo Becchi
My Upcoming Events 🕃	Comment Dupdate Add Time Add Time Move to Top Add Add		

Save Refresh			
Deliver Training Session 1			
Percent Complete *			Details
Time Type Hours On Analysis 3 5/19/2016 Comments Met with project coordinator to understand task requirement and provided documentatio	n.		Project Test for End to End Training Dates Fri 6/17/16 - Mon 6/20/16 Est Hrs 0.00 Act Hrs 0.00 Remaining Hrs
Notification			0.00
Cathylynn Metcalf, Matteo Becchi (Manager), Sharjil Hasan		*	
Notify Other People			
Start typing	Q	×	

- 2. Update **Percentage Complete** (required field), add time type and hours worked. You may also add comments, and notify team members.
- 3. Click **SAVE** when done.

UPDATING PROJECT STATUS

Projects should be updated on a weekly basis. The standard project update contains the following components:

Summary – Overall summary of the state of the project Recent Accomplishments – What happened in the last week / month Activities Planned Ahead – What do you plan to happen in the next week / month Overall Project Timeline – High level timeline of major project pieces Issues – New issue, or updates to existing ones Risks – New risks, or updates to existing ones

To update a project:

1. Select the **Project** name in the **Desktop**.

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≡	Desktop Projects My Work Briefcase Workspaces Resource Management		
C Refresh	🖌 🖋 Edit Desktop 🔸 New Desktop 🖌 Manage Desktops 🖶 Print		
Project	ls	• C ×	
	Business Intelligence and Analytics Training Project		
25%	Jacqueline Palumbo		
	Wed 10/1/14 - Fri 7/31/15		
	Work with the Business Intelligence and Analytics Team to update and enhance the Business Intelligence and Informer trainingmore		
20%	OIT Tech Expo 2015		
	Jacqueline Palumbo		
	Sun 3/1/15 - Sun 11/1/15		
	Work with senior management to host a campus-wide OIT Expo highlighting OIT services and staff.		
30%	Retention and Student Success Analytics		
	Kirill Lobachyov, Victoria Edrington		
	Fri 11/7/14 - Fri 7/31/15		
	Provide AU Academic Units, Senior Leadership, and Commuinty At-Large with interactive and easy to use information products to more		
	SharePoint 2013 Training Project		
	Jacqueline Palumbo		
20%	Tue 10/14/14 - Fri 7/31/15		
	Create documentation, training courses, video guides, and endures reference for SharePoint 2013.		

2. Click UPDATE STATUS

Project Details	Actions Úpdate Status Refresh Print	^	
General University Strategic Goals	SharePoint 2013 Training Project	Green	
Risks	General		
Expenses			
Time Types	Acct/Dept OIT - IT Customer Service	Manager(s)	
Resources	Service	Jacqueline Palumbo	
Score Card	Project Request for Office of Information Technology (OIT) / Project Request for Office of Information Technology (OIT)	jpalum@american.edu	
Stakeholders			

- 3. Fill in the following fields and click **Save**. See screen shot below.
 - New Status From the drop down list, select 'In Process', 'New', or 'On Hold'.
 - Health From the drop down list, select 'Green', 'Yellow', or 'Red'
 - **Percent Complete –** Enter the percentage completed for the project.
 - **Comments** Provide a summary update for the project including accomplishments, high-level timeline, next steps, issues and risks.
 - Notification From the drop down list, select 'All' to notify the project team members.
| Update Project Status - 256110: TeamDynamix Trainir | g - G | oogle (| Chrome — | | \times | |
|---|-----------------|---------|-------------------------------|----------|----------|--|
| https://american.teamdynamix.com/TDNext// | Apps | /Proje | cts/TeamManagement/ProjectS | tatusUpd | la E | |
| Save | | | | | | |
| TeamDynamix Training
Project ID: 256110 | | | In | Proces | s | |
| New Status * | | | | | | |
| In Process | | • | Issues | | | |
| Health | | | Open
1/1 (100.00 %) | | | |
| Green | | • | | | | |
| Percent Complete | | | Tasks | | | |
| Comments | Completed | | | | | |
| Summary – Overall summary of the state of the project | 17/153 (11.11%) | | | | | |
| Recent Accomplishments – What happened in the last week /
Activities Planned Ahead – What do you plan to happen in the | montł
e next | ו | In Process | | | |
| week / month | | | 2/153 (1.31%) | | | |
| Issues – New issue, or updates to existing ones | pieces | 5 | Overdue | | | |
| Risks – New risks, or updates to existing ones | | | 03/133 (34.2370) | | | |
| I | | | Not Started | | | |
| | | 6 | 51/155 (24.1676) | | | |
| lotification | | | 14/153 (9.15%) | | | |
| Start typing | | | Milestones | | × | |
| letify Other Deeple | | | 0/10 (0%) | | | |
| Start typina | 0 | * | | | | |
| | ~ | ~ | | | | |
| Other Email Addresses | | | Actual Hours | | | |
| | | | Tasks | | | |

4. Click the **SAVE** button when done. You can choose to notify the project team members and other stakeholders when updating the project status.

TRACK ACCOMPLISHMENTS

Use **MY ACCOMPLISHMENTS** view to track work that you have completed on the project.

Jacqueline Palumbo 🗸	My Work - x Eriefcase		😡 Help 🦛 8
🕻 Refresh 🥒 Edit My Profile 🔸	New Event + New Issue		
My Managed Projects (2) My Approvals (0) My Assignments (3)	Send Output Totay Yesterday This Week Last Week This Month Custom 6/30/2014 - 7/6/2014 Send out Communication Notification for TD Training TrainDynamic Software Implementation > TeamDynamic Implementation > Task Comment Update Add Time	Completed Men 6/30/14 3:56 PM	Creator Sharjil Hasan
My Work (4) My Accomplishments (1) My Time Card			

The **Project Feed** automatically tracks all Status Changes, Edits, Comments, and Likes for the project. It also tracks replies to emails generated by the feed. Most feed items are system generated, however you can also contribute directly to the Feed.

- 1. Click the Project Name in the navigation pane of the Project Desktop.
- 2. Click FEED.
- 3. Click **COMMENT** to contribute directly to the Feed. Select the Team Members you wish to notify by email.
- 4. You can select **LIKE** any entries in the Feed.

Your training completion has been tracked in the QIT Training Database. Thanks for attending today	All Alex Nyce (Project Manager Andrew El-Kadi
	Ann Parambil
Save Cancel	
added Thomas Nouven to the project by approving a resource request	
an hour ago	

WORKING WITH THE PROJECT CALENDAR

You will only see calendar items related to the projects you are involved in.

- 1. Click on the **Project Name** in the navigation pane of the **Project Desktop**.
- 2. Click CALENDAR.
- 3. Select one of the view choices.



4. You can also click **SHOW** to select what to display on the calendar.

_	17 mm
•**	My Events
18 N	Issues
	 Mybraes
	Tasks
	My Tasks
	Time Off
	My Time Off
	Tickets

CLOSING OUT A PROJECT

You will need to complete all five steps in order to close a project.

1. Conduct Lessons Learned feedback gathering session, post PPT to TD Briefcase

🔄 🛈 🔒 https://american.teamdynamix	.com/TDNext/Home/Desktop/Default.aspx	C Q Star	rch	☆ 白 ♡	\$ A @ 0	≡
Most Visited () Getting Started () HP D	ownload Store 🛃 Web Sice Gallery 🔛 Pedro Calde	ron de la B		₿1 p0	Nat 👗 Samer Atawne	eh
C Refresh C Edit Projects / Workspa	ces Desitoo + New Q Search	e Management veopie snercase				•
Calendar	search briefcase Q Adv. Search	+New @Security @Refresh &Download Folder	*** Folder Actions		6 file	les
Contacts		4 8	for footally	M-00-00		-
Issues	My Checked Out Files	2 Name	Size Created by	modified by in	noamea	~
Links	My Files	AU_Implementation_Plan_Template.xlsx	26 KB Matteo Becchi	Matteo Becchi V	Ved 5/11/16 2:23 PM	•
Plans	Recent Files	AU_Project_Charter_Template.docx	54 KB Matteo Becchi	Matteo Becchi V	Ved 5/11/16 2:23 PM	•
A Test for End to End Training	Folders	Lessons_Learned_Template.ppt	234 KB Matteo Becchi	Matteo Becchi V	Ved 5/11/16 2:23 PM	•
Details	🔄 Project Request Files	* Stall Requirements Templateuts	an and the sources participa	Matteo Recchi V	Ved 5/11/16 2:21 PM	-
Team	# 🔛 Project Templates		St KD - Martin Barchi	Martin Breaki		
Feed	🔛 Large Projects	Au_resong_PLan_remplate.us	30 NB Matteo Secon	Matteo Becchi V	Ved 3/11/16 2/23 PM	•
Announcements	🔤 Small_Medium Projects	AU_UAT_Sign_Off.doc	42 KB Matteo Becchi	Matteo Becchi V	Ved 5/11/16 2:23 PM	•
Briefcase		To add files, dru	ag and drop them anywhere on th	e screen.		
Calendar						
Contacts						
lisues						
Links						
Plans Tart Diniart Samer 5-22-15						
Test Project samer 5-22-15	1					
Team						
Feed						
Announcements						
Reletase						
Calendar						
Contacts						

2. Close all Issues and Risks, transfer to iSupport / Risk Register if still open

New Issue	
Title*	
Error Message in screen capture	
Category* Issues	
Priority*	
Status*	
Description	
Cannot grab a screen capture due to error message.	^

3. Mark all Project Plan Tasks as 100% complete

-	Q Refresh → Print - ✓ Save & Check in ± Deport * iĝij Undo Checkout O Options Mintege	Collapse +	A Cut Copy Copy Coboard	+ Insert X Delete # Outdent	Move Up Hove Dow El Indent	Hiestone * Baseline * Story * Tasks List	Assign B Start Sconer	A Forego A Backgr	ound + Find: 1	idden tar	iks in resul	Next Prev ts	3
-	February, 2016	March, 2	214		April, 2016		May, 2016	_	June, 2016		3494 2016		Plans (2)
	Total for the	d to find Tiaming										\sim	Include Inactive
_						Project P	64 -				_		Project Plan
						Start Dute	End Date	Durati	Priority 0	Ext.Hes	Ad Bis	% Rev	Tue 5/3/2016 - Wed 7/6/2016
18	Define Project Requirements, PE	At taxing builde	e			Fri 5/20/2016	Mon 5/23/2016	Thebyth	10110 100 ren 5/27/201	6 0.30	tays Que	Nobel	
19	Develop Project Plan in TD, task	s, resources, tim	elines and	dependenci	es	Tue 5/24/2016	wed 5/25/2016	2 days	None None	0.30	0.0	0%	
20	Identify Risks and Issues and relu	ated mitigation p	lans, log ir	TD Issues		Thu 5/26/2016	Fri 5/27/2016	2 days	III None	0.30	000	0%	
21	ject Execution				Tue 5/3/2016	Mon 5/9/2016	5 days	None None	0.90	000	0.%		
22	Log Actual Hours spent on Design, Development, Testing, Training, Implementing			ementing	Tue 5/3/2016	Tue 5/3/2016	1 day	III None	0.30	00	0%		
25	Update % complete on Tasks					Wed 5/4/2016	Thu 5/5/2016	2 days	None None	0.30	000	0%	
24	Update Current / Log new Issuer	r/Risks				Fri 5/6/2016	Mon 5/9/2016	2 days	III None	0.30	00	0%	
25	ject Closing					Tue 5/10/2016	Mon 5/23/2016	10 days	III None	1.50	00	0%	
26	Conduct Lessons Learned feedb	ack gathering set	ision, post	PPT to TD B	riefcase	Tue 5/10/2016	Wed 5/11/2016	2 days	III None	0.30	00	0%	
27	Close all issues and Risks, transfe	er to iSupport / F	tisk Registe	r if still oper	5	Thu 5/12/2016	Fri 5/13/2016	2 days	None None	0.30	00	0.%	
28	Mark all Project Plan Tasks as 10	0% complete				Mon 5/16/2016	Tue 5/17/2016	2 days	III None	0,30	000	100	
29	Post all Required Deliverables in	to Project Briefc	ase			Wed 5/18/2016	Thu 5/19/2016	2 days	III None	0.30	000	0%	
50	Close Project Request in TD					Fri 5/20/2016	Mon 5/23/2016	2 days	None None	0.30	000	0%	
31	urring Steps					Tue 5/3/2016	Mon 5/9/2016	5 days	III None	0.30	0.00	0%	
32	Post project updates via Update	Status in TD				Tue 5/3/2016	Mon 5/9/2016	5 days	None None	0,30	0.00	0.%	
55	all Training Content (Steps and S	icreen Shots) int	o 1 Docum	ent		Mon 5/30/2016	Fri 6/3/2016	5 days	III None	0.00	0.0	0.%	· memory
									1				Plans (2) Resources (7)

- 4. Post all Deliverables into the Project Briefcase
- 5. Close Project Request in TD
 - a. From Manage Project, change the project status to CLOSE.

Project Details	Actions	Update Status	Refresh
General	Deactivate		Training
University Strategic Goals	Apply a Proje	Training	
Risks	Add Baseline	8	
Expenses	Close		
Time Types	Acct/Dept OIT - IT Custome	er Service	

Complete the close process, then click the CLOSE button.

Close	
Close Project	
Contribute files to the File Cabinet	
You should add any necessary items from this project to the File Cabinet before closing it. Adding files to the File Cabinet will allow us access information stored in this project at a later time, even after the project is closed. Click the "Go To Briefcase" link below to add fil the File Cabinet.	ers to es to
Go To Briefcase	
Close unfinished items	
Issues (0 unfinished)	
Tasks (46 unfinished)	
* All resource requests will be cancelled. * All resource schedules will be changed to end today. * All tickets associated with unfinished tasks will be reverted.	
Request feedback	
Closure Survey 🗵	
\checkmark	
There are no project surveys currently available for use. If you wish to use a project survey, please notify your TeamDynamiz administrator.	c
Choose the closed project status	
Active	
Active: This will allow users on this Project to continue to report time and expenses on this Project.	
O Inactive: This will disallow users to add time and expenses on this Project.	

- 6. Post all Required Deliverables into Project Briefcase
 - a. Add **Briefcase** files to the **File Cabinet**. The **File Cabinet** is a document repository that is accessible once the project is closed.

TrainingDept - CommonSpot9.xlsx								
General	Security	Read By	Revisions	Attributes				
Actions	Download							
Move								
Сору	ject \ Pro	ject Documents \ TrainingD	ept - CommonSpot9.xlsx					
Rename								
Add to File Cabine	t							
Forward								
Delete								
Flag								
Check Out								
NEVISION								

TEAMDYNAMIX REPORTING

TeamDynamix allows you to easily run status reports from a project that that you are a resource on. There are five types of reports in TeamDynamix:

- 1. Status
- 2. Issue
- 3. Plan(s)
- 4. Time
- 5. BBPM

STATUS REPORTS

This report displays the following details for a project for the specified date range:

- Milestones (Completed or that should have been completed for the period)
- Tasks Completed (During the period)
- Active Tasks (Tasks started before the period end date that are not complete)
- Overdue Tasks (Tasks whose end date is before today and the percent complete is less than 100%) \square Open Issues
- Closed Issues (During the period)
- Events (During the period)
- Upcoming Events (In the next 7 Calendar days)
- Time Reported By Project (During the period)

ISSUE REPORTS

These reports display current project issues:

- Issue Aging Report
- Issue Resolution Status Report
- Issue Work Report
- Issues by Due Date Report

PLAN(S) REPORTS

These reports include:

- Plan(s) Summary Report
- Milestones Report
- Task Work by Person Report
- Tasks Summary by Plan Report
- Tasks by Person Report

TIME REPORTS

These reports track time as designated by your organization.

BBPM REPORTS

These are bare bones project management reports. There are two BBPM reports:

- 1. Task Report
- 2. Issues Report

RUN A REPORT

1. Click on **REPORTS** in the Navigation Pane.



- 2. Select the Report type, e.g. Plan(s) Summary Report.
- 3. Select the Project.

4. Determine the **Report Parameters**.

5. Click **RUN REPORT**.

American University	
Desktop Projects -	* My Work Briefcase Workspaces
CRefresh 🕜 Edit Projects Desktop	+ New Q Search
Desktop	Run Report Print Help
Manage Projects Search Users	Plans Summary Report
Reports	Project SharePoint 2013 Training Project
Status Reports	
Project Status Report	

6. The report will display.

Run Report Print	Help			
Plans Summary R	eport			
Project SharePoint 2013 Training Proje	ect 🔽			
Starts	Ends	3-		
Monday, October 13, 2014	Monday, July 27, 2015	2	2	
Duration	Days Used	2		
206 weekdays	7.28 %	2-	_	
Estimated Hours	Actual Hours	Hour		
2.00	0.00	1-		
Hours Over/Under	Hours Used	1		
2.00	0.00 %			
Estimated Percent Complete	Total Tasks	0	Ect Hire	
0.00 %	50 tasks		LSUTIS	ACUTIS

7. Some reports, including Status Reports, allow you to export directly to Microsoft Word.

Run F	Report	Print	To Word Help					
Tear	nDyna 14 - Tue 8/12/	mix Train	ing Project					
Status Green (P	roject is on tra	ck) Updated Thu 6/20	5/14					
Comme	nts							
Change GH	d status from Y	ellow to Green.						
Descrip	tion							
Training	for TeamDyna	imix						
Report	Period							
Sun 6/15	5/14 to Sat 6/21	/14						
Run Dat	te							
Thu 6/26	5/14 10:53 AM							
0 Mile	estones (Completed o	r that should have	e been comp	leted for the per	iod)		
Plan	# Task	Start Date	Base Start Date	End Date	Base End Date	Completed	Est Hrs	Base Est H
0 Tasl	ks Compl	eted (During	the defined perio	od)				
Plan	# Task	Start Date	Base Start Date	End Date	Base End Date	Completed	Est Hrs	Base Est Hrs

SETTING UP A COMMUNITY ACCOUNT

It is recommended that you set up your Community Account before working with the interface. It is recommended that you set up your Community Account before working with the interface. The Community page contains valuable information including update notes and videos and webinars.

Home Videos Articles Events Downlo	ads Questions Connections Groups		
COMMUNITY		Sign In	
Download free project managemen Read the latest news and articles	it software	Register Now	
Videos D	Articles	Featured Downloads	
Transitioning to a Service-Focused Organization (A Webina	Great Higher Ed Client Portals Sharon Santino March 9, 2015	Task Manager Task Manager is a free, powerful desktop application you	
February 25, 2015	TD Insider's Look Case Studies Sharon Santino March 6, 2015	can use to quickly alto easily create and manage task plans. If you are a TeamDynamix user, this tool will synchronize seamlessly with TeamDynamix.	
TeamDynamix 9.0. Introduction to TD			
TeamDynamix 9.0. Introduction to TD Enterprise Service Ma February 13, 2015	Who Said Winter Isn't Fun? Kylle Miller March 4, 2015	Upcoming Events	
Tem/Dynamis 0.0. Introduction to TD Enterprise Service Ma Freeway 13,2015 Interface Score Virginia Tech's Iterative IT Service Mana	Who Said Winter Isn't Fun? Kyle Miller March 4, 2015 To Team: Meet Our New Marketing Inform, Kylie	Upcoming Events PPM/ITSM Implementations: Proven Higher Ed Approaches	

To set up a Community Account:



- 2. Click **REGISTER NOW**.
- 3. Complete the **REQUIRED FORM FIELDS** and **SAVE** the form.
- 4. You'll see **REGISTRATION CONFIRMATION screen**.

HOME	VIDEOS	ARTICLES	EVENTS	DOWNLOADS	FORUMS	CONNECTIONS	GROUPS
Rec	jister	an Ad	cour	nt			
Email Ad	dress*						
First Nam	ie [*]						
Middle N	ame						

5. Check your e-mail to complete the **ACTIVATION PROCESS**.



6. Click the BACK button on your browser several times to return to the TEAMDYNAMIX HOME PAGE.

TEAN	Л	DYNA	AMIX U	NIVERSAL	WIDGETS				
The Te	ea	mDyna	amix Des	ktop contains	four universal w	idgets:			
1.	,	Weath	er						
2.	-	To Do	List						
3.	(Chat							
4.		Sign oı	ut						
4	5	53°F	⊠ 0	© Chat	Lacqueline				

The **CHAT** feature shows all TeamDynamix users who are currently online. Chat communications are temporary and are not captured in the system, but are stored on the TeamDynamix servers.

12 ucar(c) online	
to user(s) onnine	
What are you working on rig	ht now?
Alex Nyce	-
Cathy Hubbs	
Eric Weakland	
Gary Wood	

GETTING HELP

Please contact the OFFICE OF INFORMATION TECHNOLOGY HELP DESK:

- <u>help@american.edu</u>
- 202-885-2550
- AskAmericanUHelp