American University
Office of Information Technology
Training Department

TeamDynamix: Client User Guide

www.american.edu/Training/tech.cfm

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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 Clients can:

- Request Projects
- Track Project Status
- Serve as Project Resources
- Contribute to the Project Feed

GETTING STARTED

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

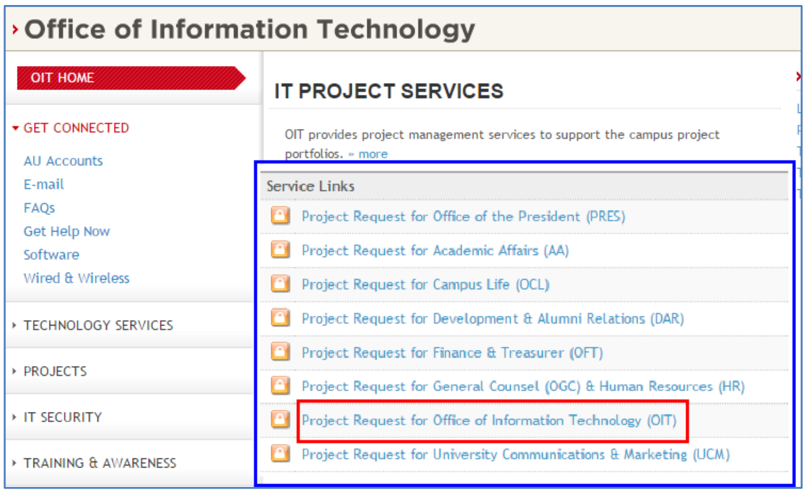
Project Issues and Risks:
Identifying issues and risk is your way to ensure quality in the project. All project team members are encouraged to use this tool to communicate issues and risks with the team.

TEAMDYNAMIX INTERFACE

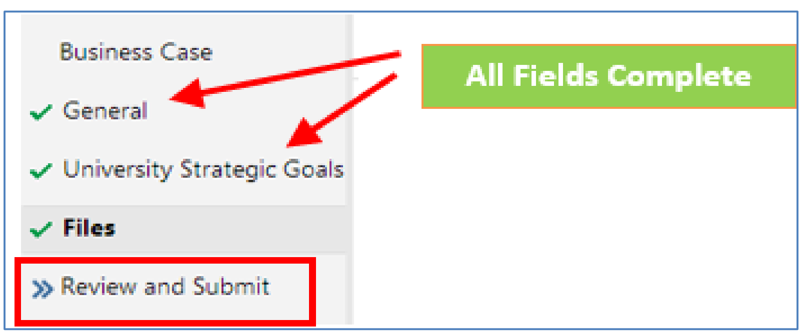
PROJECT REQUEST

TeamDynamix Clients will access a Project Request form from the IT Project Services webpage, and from within the TeamDynamix application. To submit a request from the IT Project Services webpage:

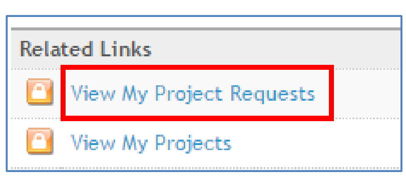
1. Navigate to the **IT Project Services** webpage: http://www.american.edu/oit/projects.
2. Click the desired **Service Link**, for example: **Project Request for Office of Information Technology (OIT)**.



3. Complete the request form. Required fields marked by a red asterisk (*) cannot be empty and must be filled out in the form. Once the form is complete, click the **MARK COMPLETE** button.
4. Once all fields are marked complete click **REVIEW AND SUBMIT.**

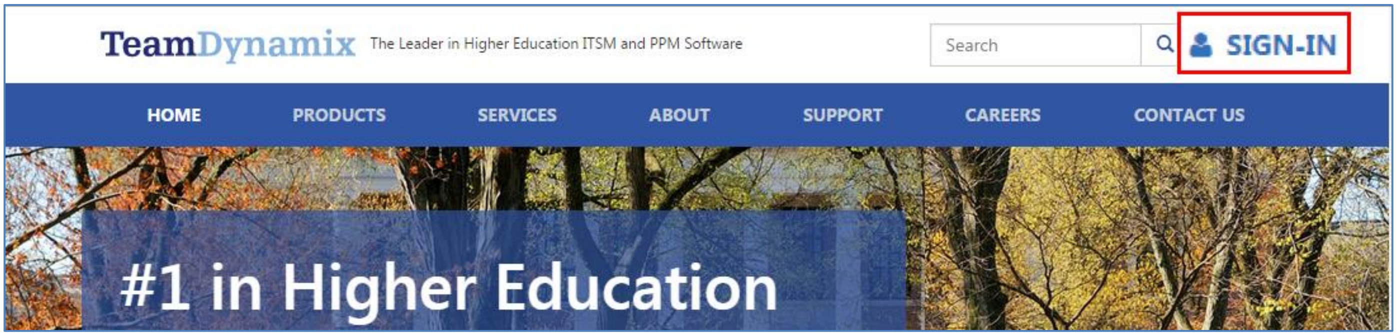


5. You can can view the status of your projects from the **Related Links** section by clicking the **VIEW MY PROJECT REQUESTS** link.

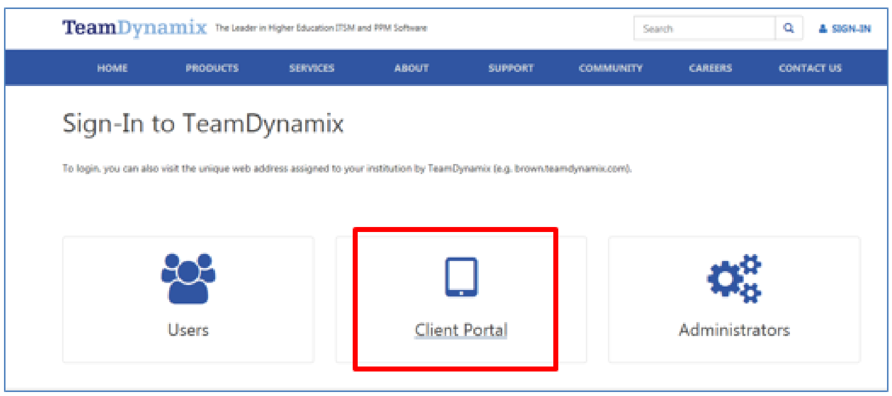


Client Interface

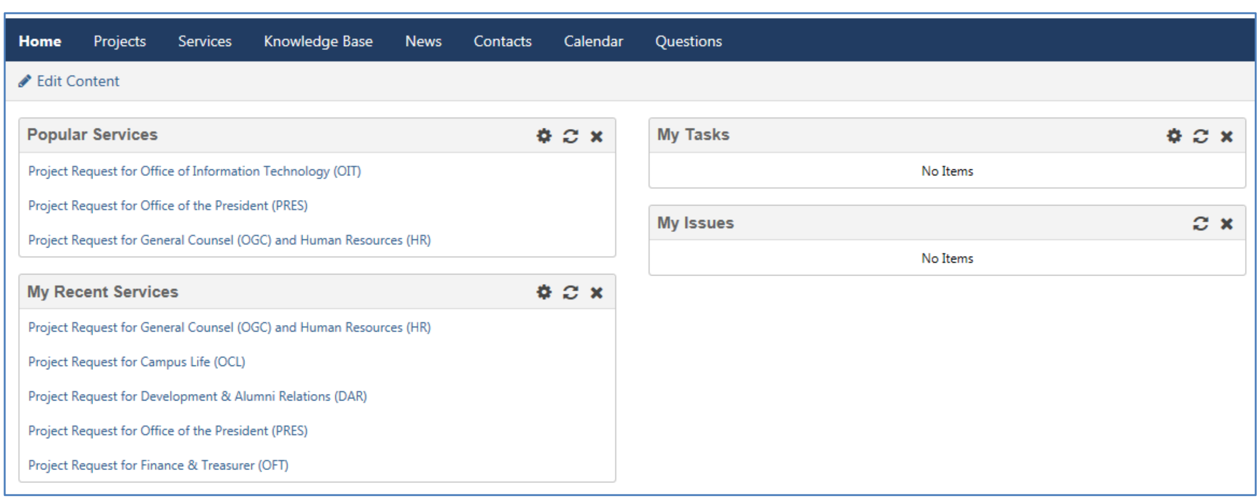
You can access the TeamDynamix client interface from: https://american.teamdynamix.com/.



1. Click the **SIGN IN** link in the upper right corner of the page.
2. Click the **CLIENT PORTAL** icon and, then, enter your American University login credentials.

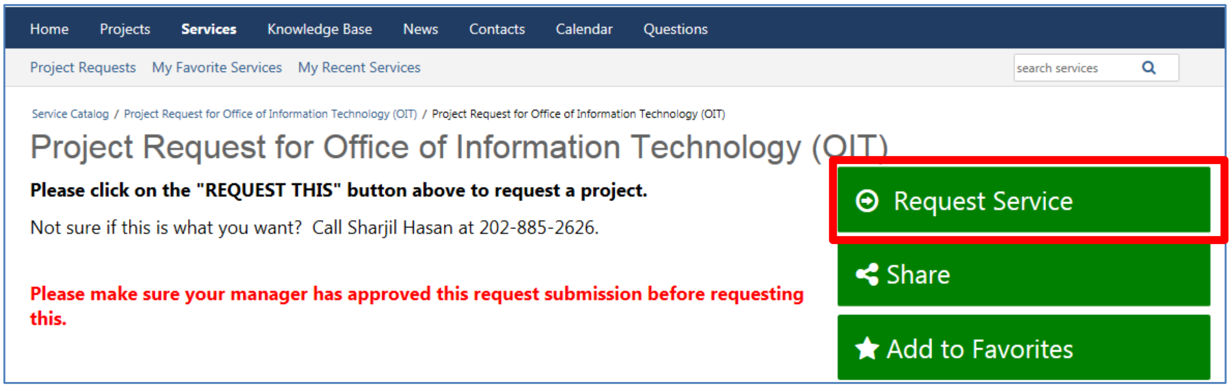


The Client Portal will open to the **Home** page. You'll see **Popular Services**, and a link **My Recent Services**. You will also see links to any **Tasks** you have been assigned to as a **Resource** on project, and also a link to any **Issues** you may have raised.

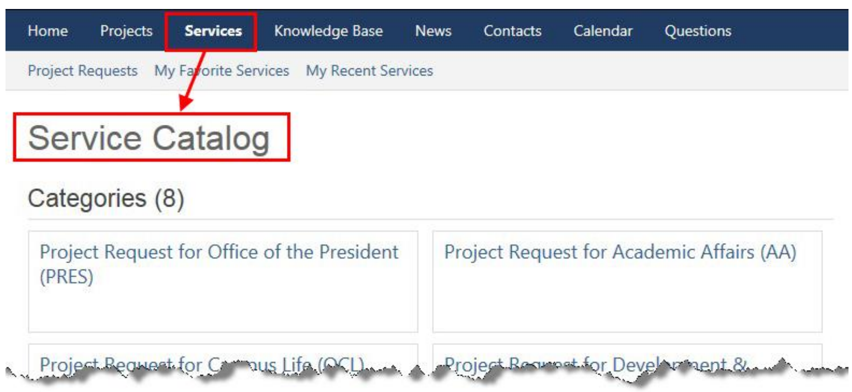


You can create a request directly from the **Home** page. To create a request:

1. Select the desired **PROJECT REQUEST** link.
2. After receiving approval from your manager to proceed, click on the **REQUEST SERVICE** button.

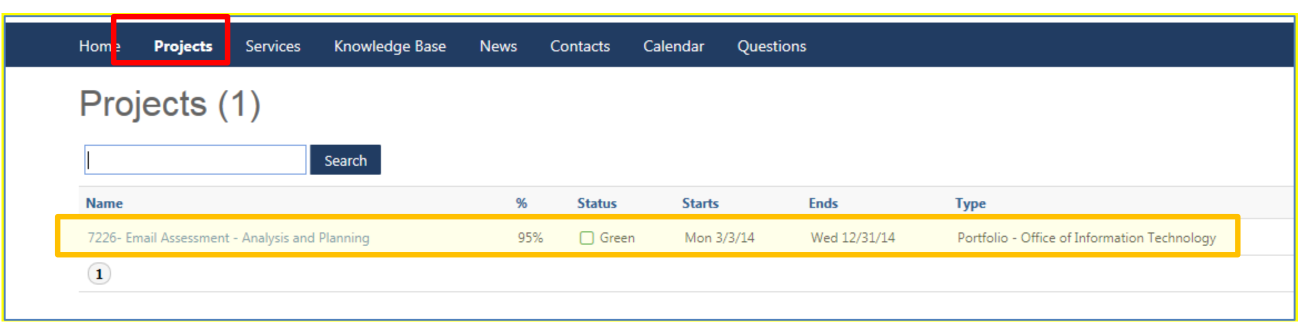


3. Complete the **New Project Technology Request** form.
4. You can also access the **Project Request** forms by clicking on the **SERVICE CATALOG** tab.



Approved Project List

You will see a list of projects on your approved projects on the **Projects Tab**. If you are not a requestor or a resource, you will not see the project listed here.



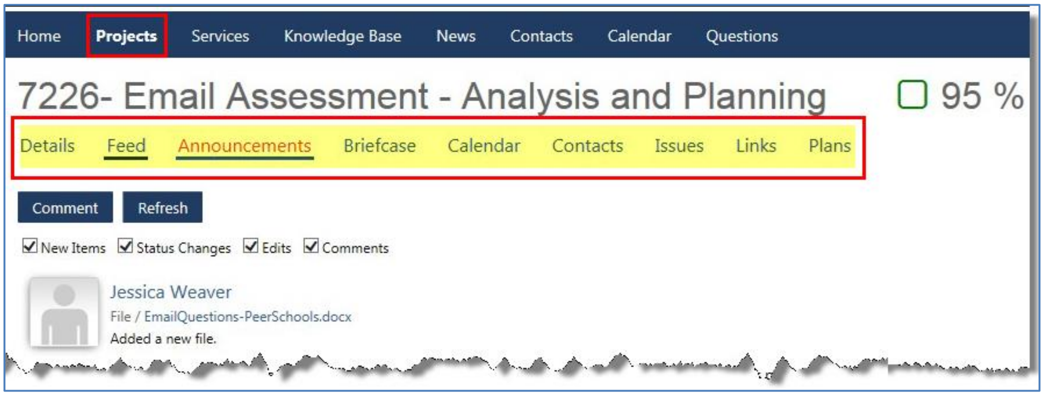
The **Project Icons** indicate the status of the project:

- 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

VIEW THE PROJECT

Click on the **Project Name** to view project information. There are nine tabs you can click to view project information:

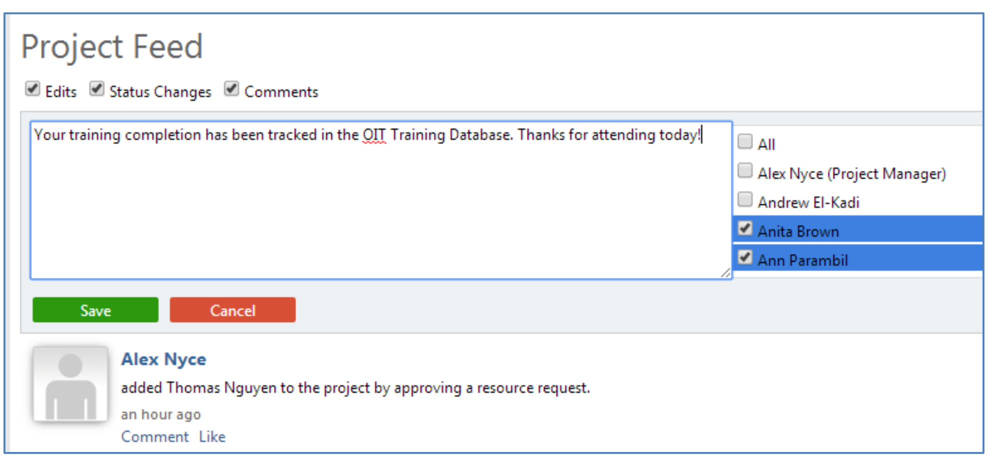
- Details
- Feed
- Announcements
- Briefcase
- Calendar
- Contacts
- Issues
- Links
- Plans



PROJECT FEED

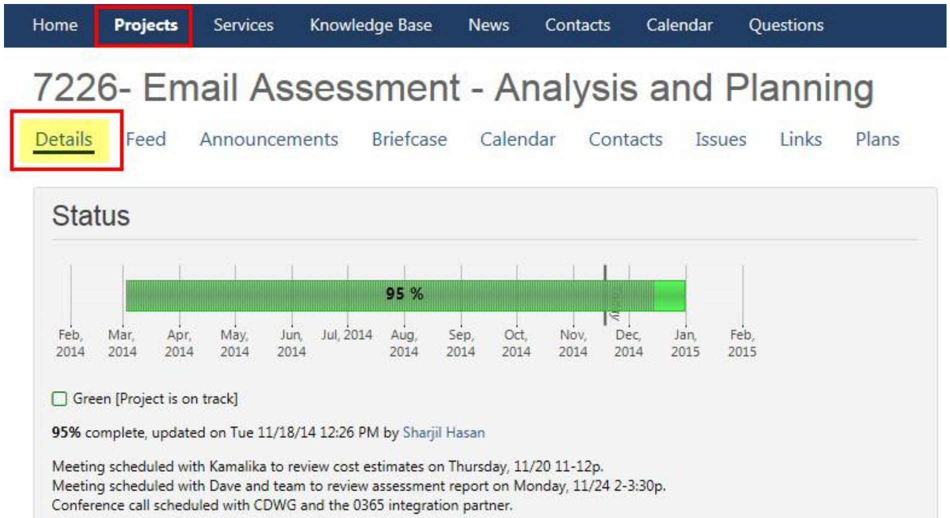
The project will open and display the **Project Feed**. The **Project Feed** automatically tracks all Status Changes, Edits, Comments, and Likes for the project. It also tracks replies to emails generated by the feed. Most feed items are system generated, however, you can also contribute directly to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



PROJECT DETAILS

The **DETAILS** tab provides detailed information about the project.



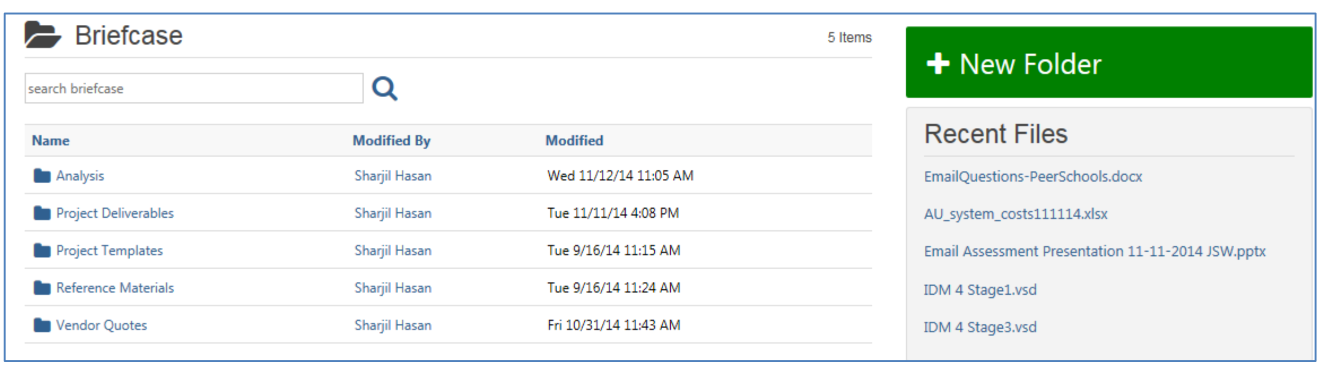
PROJECT ANNOUNCEMENTS

The **ANNOUNCEMENTS** tab displays announcements posted by the project team members, and allows you to post your own announcements. To post an announcement:

1. Click the **NEW** button.
2. Add information to the required fields, denoted with a red asterisk.
3. Click **SAVE**.

PROJECT BRIEFCASE

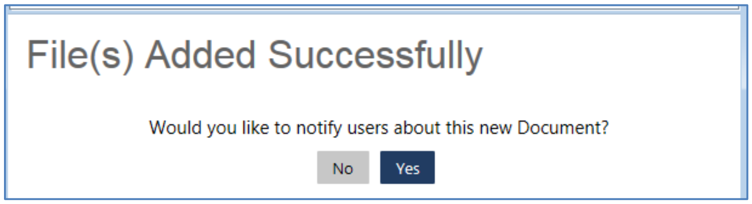
The **BRIEFCASE** is the central repository for project documents. The **Briefcase** allows you to upload documents and to save multiple revisions of a document when you use the Check Out/Check In feature. You can also notify team members that a document has been added to the briefcase.



To upload a folder to the **BRIEFCASE**:

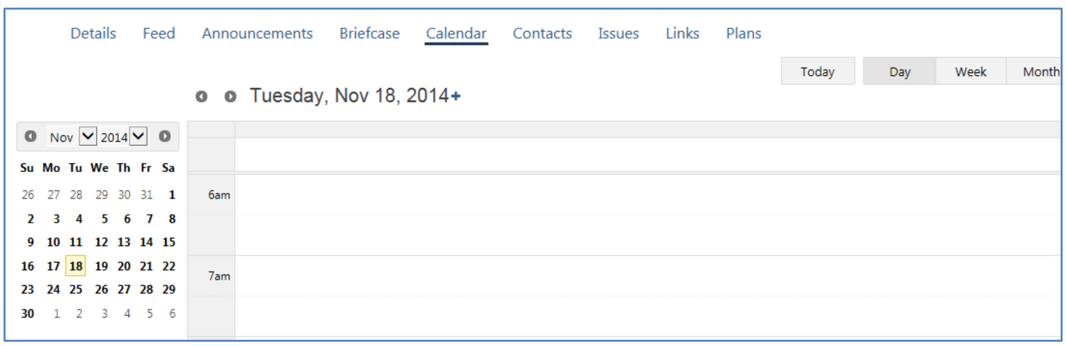
1. Click the folder name.
2. Click the **ADD FILES** button.
3. Browse to select the file to upload.

You can choose to notify team members and that a document was uploaded.



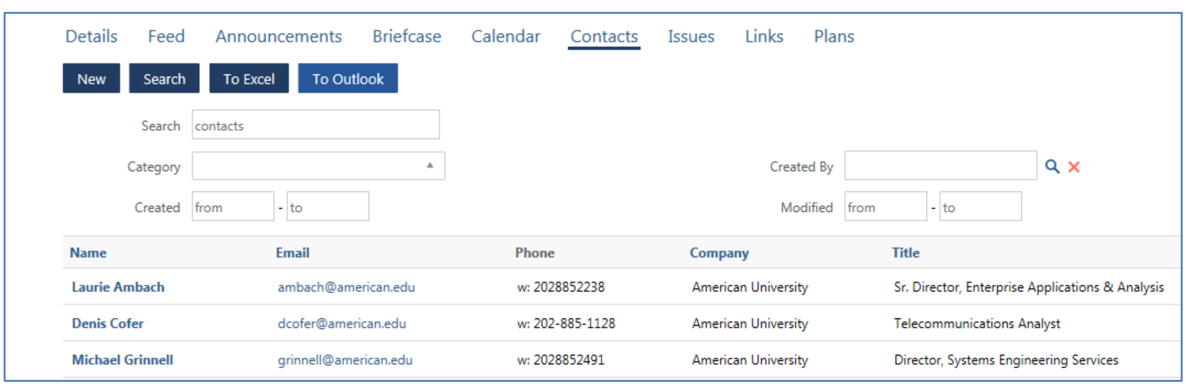
PROJECT CALENDAR

The **CALENDAR** allows you to see scheduled project information sorted by day, week, or month.



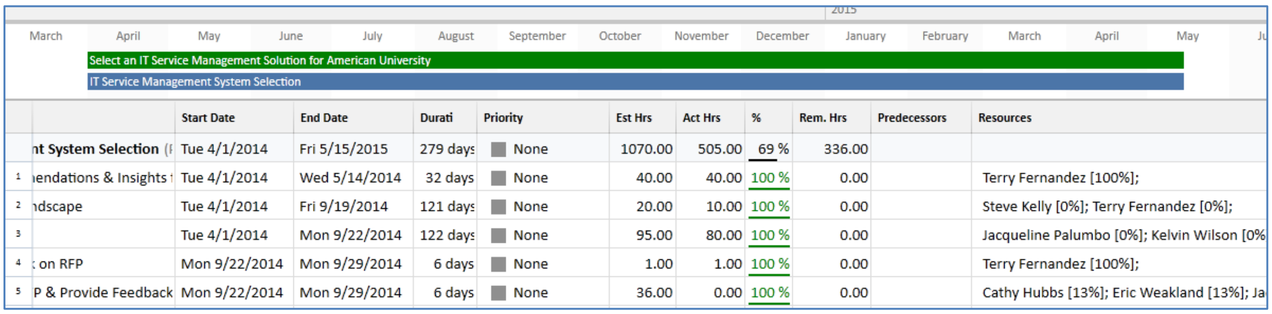
PROJECT CONTACTS

The **CONTACTS** tab displays contact information for each project member.



Project Teams

1. Click 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 the project they are working on, their assignments, and their accomplishments on the project. You can comment or update information from this window.



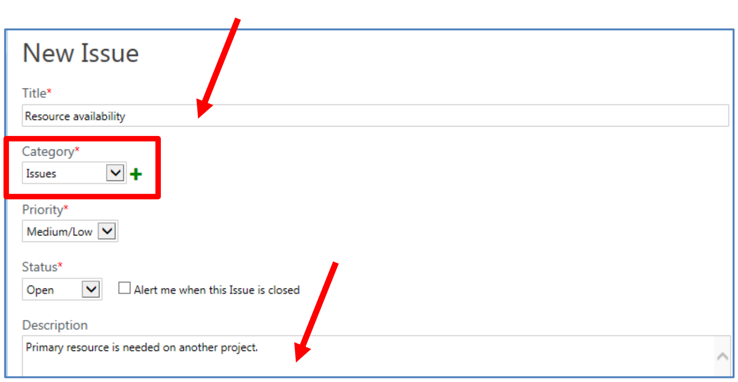
		Start Date	End Date	Durati	Priority	Est Hrs	Act Hrs	%	Rem. Hrs	Predecessors	Resources
	nt System Selection (I	Tue 4/1/2014	Fri 5/15/2015	279 days	None	1070.00	505.00	69 %	336.00		
1	ıendations & Insights	Tue 4/1/2014	Wed 5/14/2014	32 days	None	40.00	40.00	100 %	0.00		Terry Fernandez [100%];
2	ıdscape	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	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

Project Issues and Risks

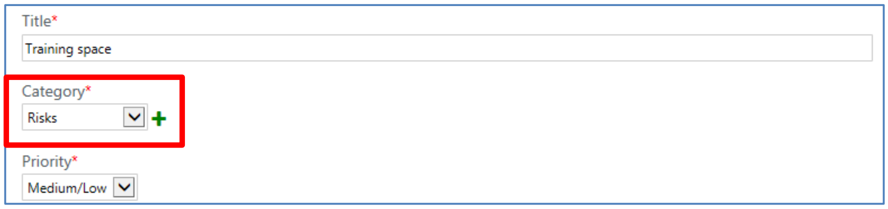
Identifying issues and risks is your way to ensure quality in the project. All project team members are encouraged to use this tool to communicate issues and risks with the team. Note that you can use an existing category, or add one into TeamDynamix for use on this project only. Identified Issues and Risks can be viewed by clicking the **ISSUES** tab.

ID	Category	Title	Responsible	Modified	Priority	Status
64700	Action Items	Add way to track meeting time	Sharjil Hasan	Wed 10/22/14 6:15 PM	Medium	Closed
65726	Action Items	Esna - Product/Solution Discovery Call	Sharjil Hasan	Thu 9/11/14 1:17 PM	Low	Open
65724	Action Items	Google Apps - GADS Research	Joni Snyder	Thu 9/11/14 12:43 PM	Low	Open

1. To create a new issue, click the **ISSUES** link on the **Project** navigation pane.
2. Click **NEW**.
3. Enter a brief description in the **Title** field, and a detailed description in the **Description** field.
4. Select **ISSUE** for the **Category**. ***Note***: you can use an existing category, or add one into TeamDynamix for use on this project only.

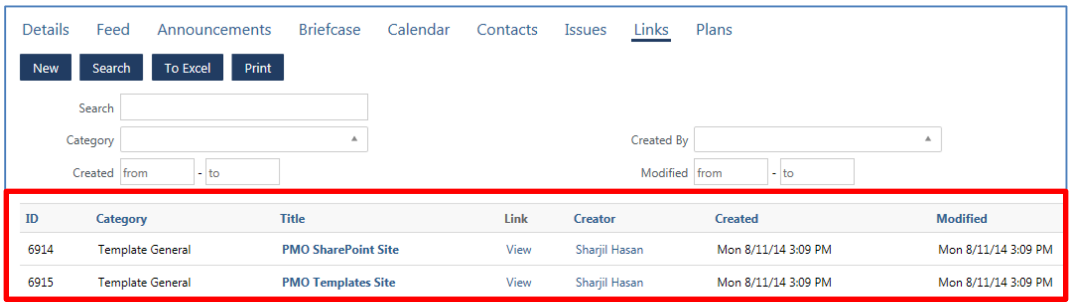


5. Complete all the required fields denoted with a red asterisk.
6. Click the **SAVE** button; you'll receive a confirmation message.
7. To create a new **Risk**, follow the steps above, but select **RISK** for the category.



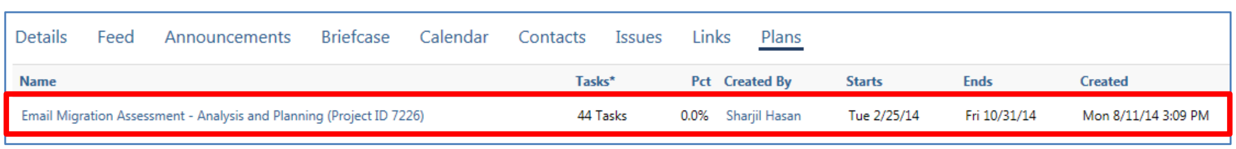
PROJECT LINKS

The **LINKS** tab is a repository for all links related to the project.

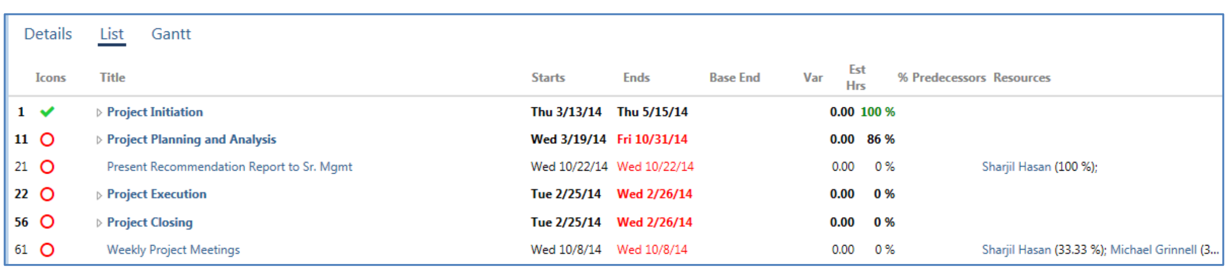


PROJECT PLANS

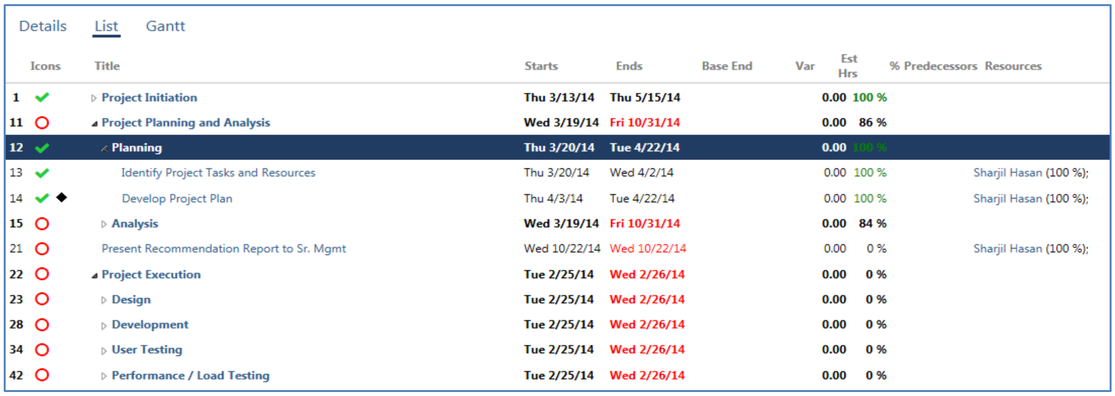
The **PLANS** tab allows you to review project tasks and milestones.



1. Click the project name to expand the plan. The plan will display in list view.



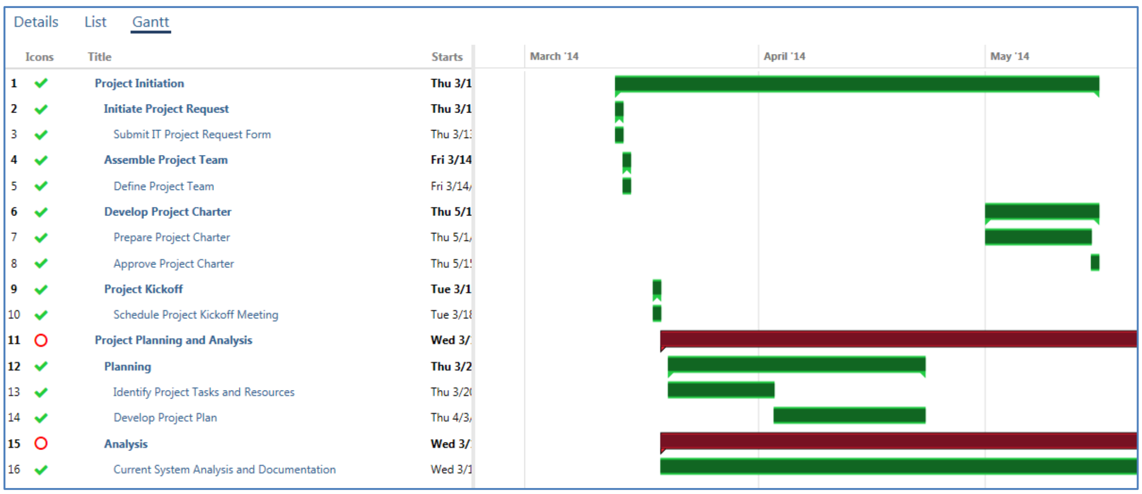
2. Drill down to display tasks and milestones.



Details List Gantt

	Icons	Title	Starts	Ends	Base End	Var	Est Hrs	%	Predecessors	Resources
1		Project Initiation	Thu 3/13/14	Thu 5/15/14			0.00	100 %		
11		Project Planning and Analysis	Wed 3/19/14	Fri 10/31/14			0.00	86 %		
12		Planning	Thu 3/20/14	Tue 4/22/14			0.00	100 %		
13		Identify Project Tasks and Resources	Thu 3/20/14	Wed 4/2/14			0.00	100 %		Sharjil Hasan (100 %);
14		Develop Project Plan	Thu 4/3/14	Tue 4/22/14			0.00	100 %		Sharjil Hasan (100 %);
15		Analysis	Wed 3/19/14	Fri 10/31/14			0.00	84 %		
21		Present Recommendation Report to Sr. Mgmt	Wed 10/22/14	Wed 10/22/14			0.00	0 %		Sharjil Hasan (100 %);
22		Project Execution	Tue 2/25/14	Wed 2/26/14			0.00	0 %		
23		Design	Tue 2/25/14	Wed 2/26/14			0.00	0 %		
28		Development	Tue 2/25/14	Wed 2/26/14			0.00	0 %		
34		User Testing	Tue 2/25/14	Wed 2/26/14			0.00	0 %		
42		Performance / Load Testing	Tue 2/25/14	Wed 2/26/14			0.00	0 %		

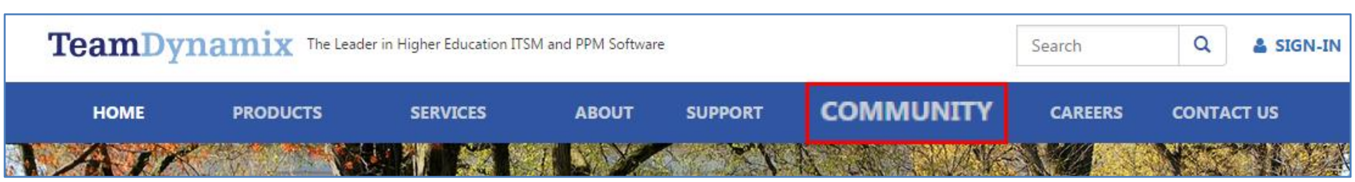
3. You can also view the plan in Gantt chart format.



Create a Community Account

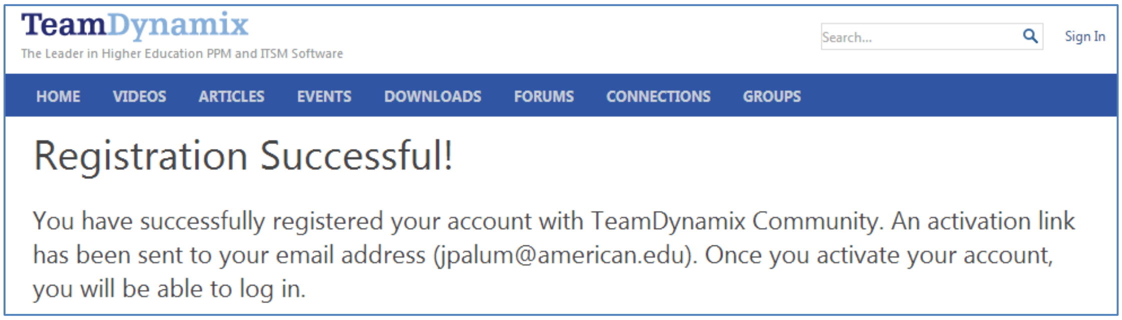
It is recommended that you set up your Community Account *before* working with the interface. The Community page contains valuable information including update notes and videos and webinars.

1. Click the **COMMUNITY** link.



2. Click **REGISTER NOW**.
3. Complete the required form fields and **SAVE** the form.
4. The **REGISTRATION CONFIRMATION** screen will display and an email will be sent to your AU email address.
5. Click the link in the e-mail to complete the **ACTIVATION PROCESS**.

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



GETTING HELP

Please contact the **OFFICE OF INFORMATION TECHNOLOGY HELP DESK**:

- help@american.edu
- 202-885-2550
- AskAmericanUHelp