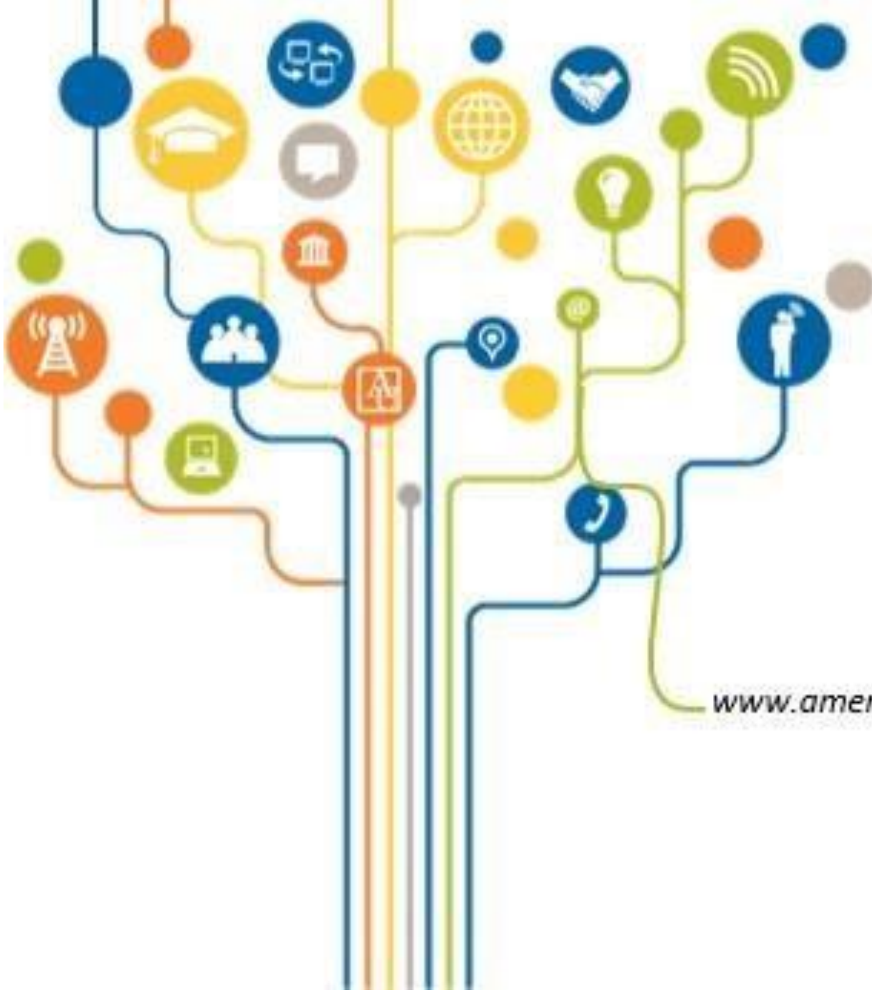
American University

Office of Information Technology

Training Department

TeamDynamix: Project Manager 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:

- 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

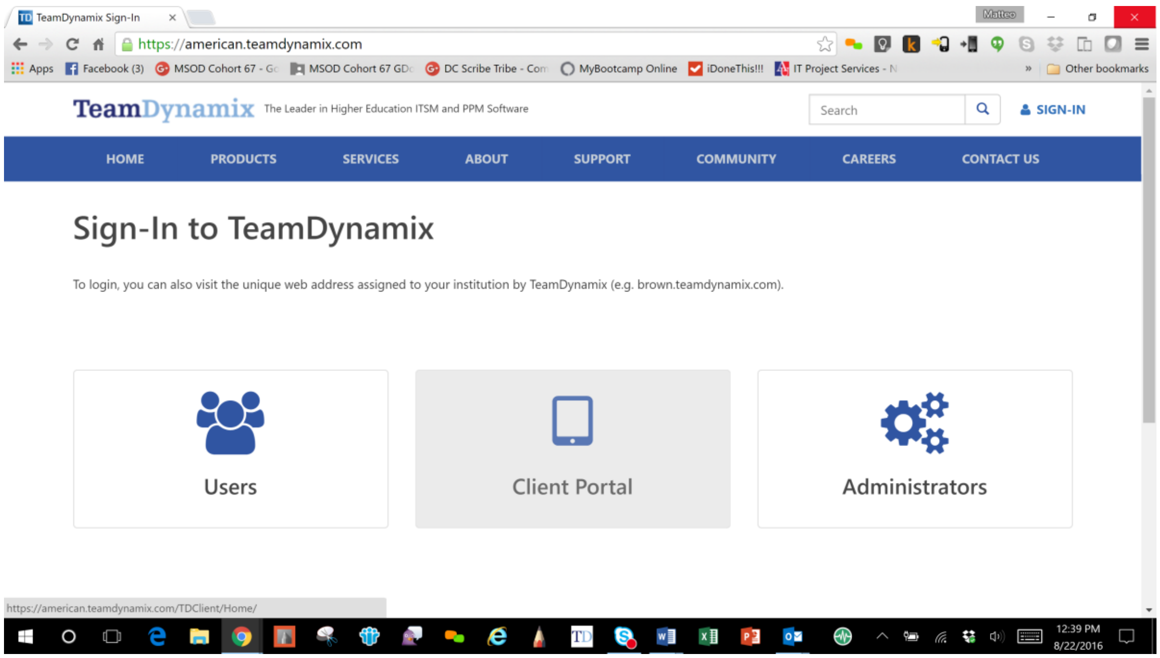
GETTING STARTED

SIGNING UP FOR TEAMDYNAMIX

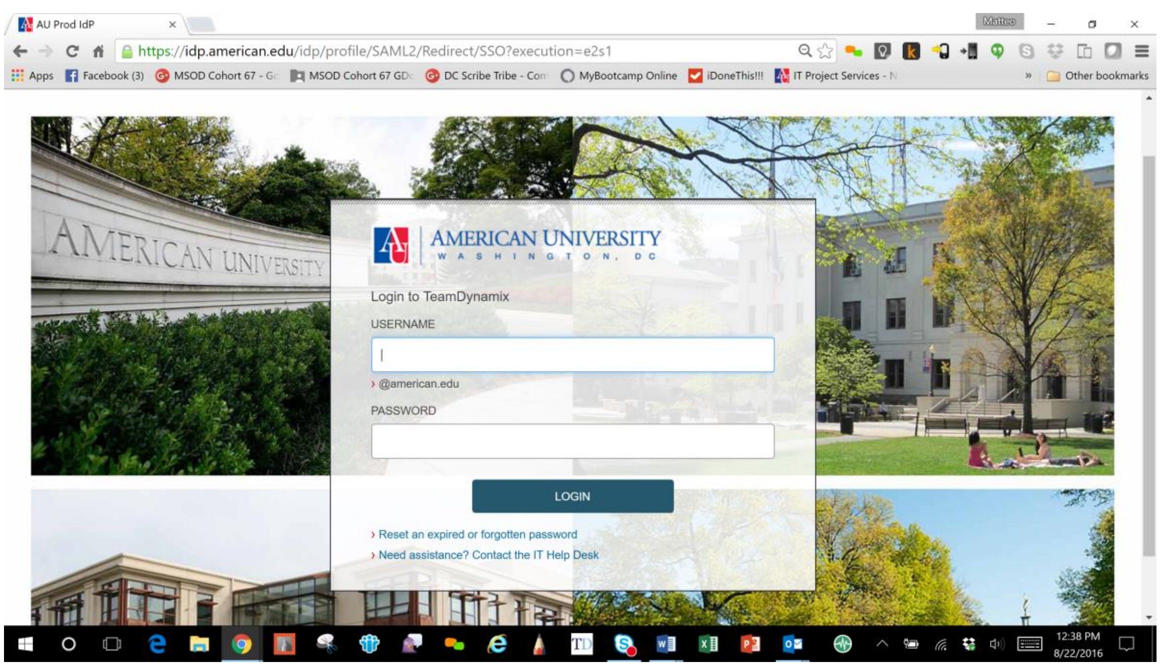
Please register for access to TeamDynamix using the steps below:

I. Go to https://american.teamdynamix.com/

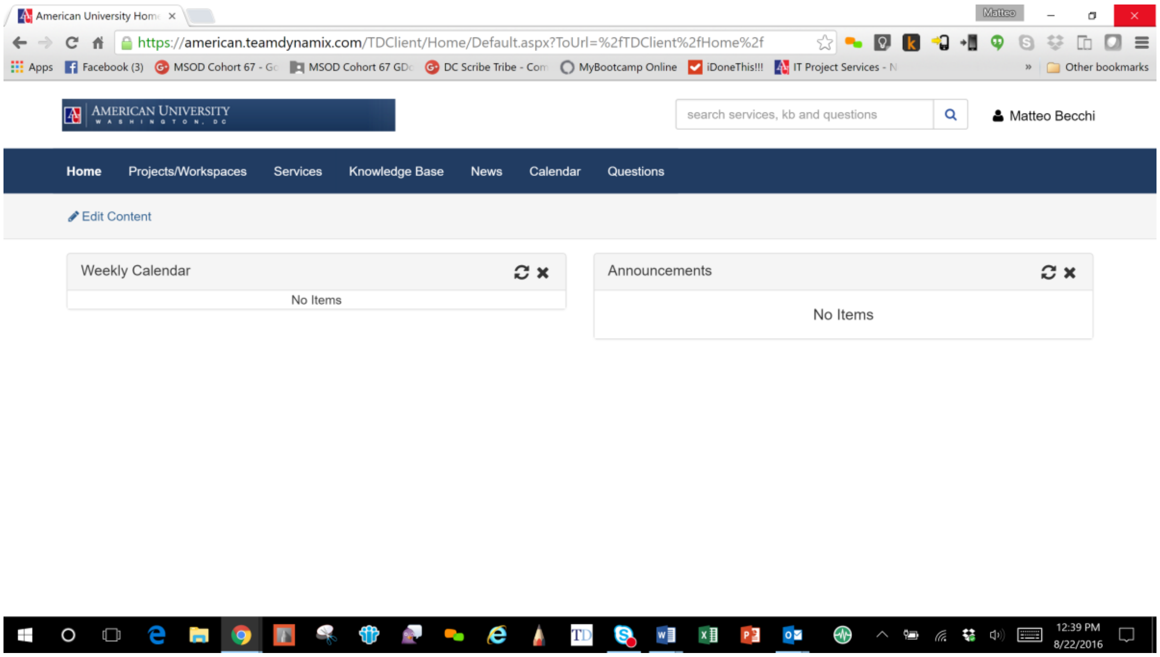
II. Click on the **Client Portal** button (center of the page)



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.'

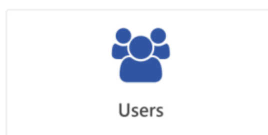


IV. Upon successful login, your TeamDynamix account will be created and you will see the TeamDynamix Client Portal page.



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.

> **Note:** 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

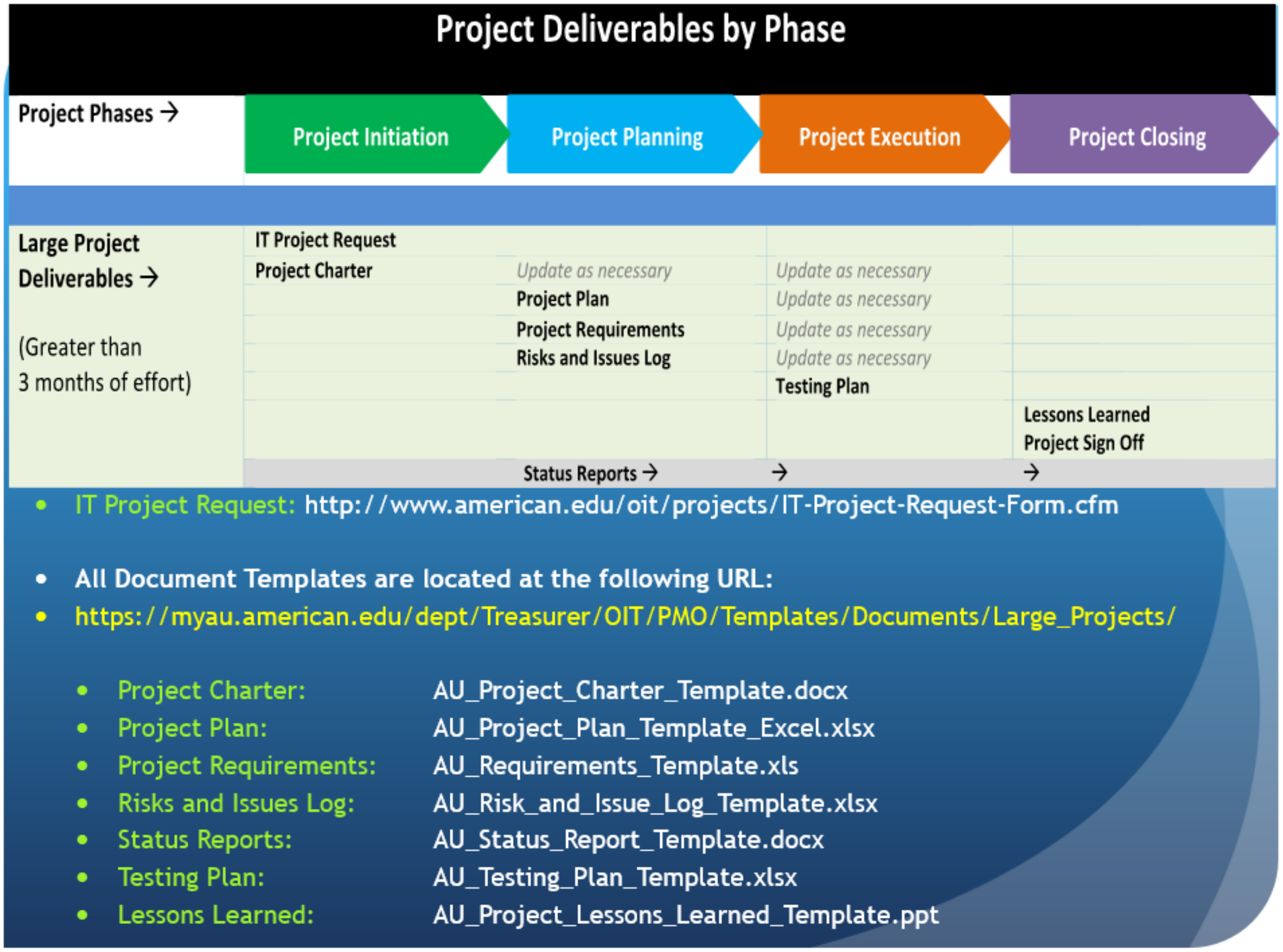
TeamDynamix tracks both **Operational** and **Project** time. An **Operational Workspace** has been setup for each team within OIT. The **Operational Workspace** allows the Resource Manager to set the individual team member's schedule and availability. Each OIT member can track hours worked on operational 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:



Project Deliverables by Phase

Project Phases →	Project Initiation	Project Planning	Project Execution	Project Closing
Large Project Deliverables →	IT Project Request			
	Project Charter	*Update as necessary*	*Update as necessary*	
		Project Plan	*Update as necessary*	
(Greater than 3 months of effort)		Project Requirements	*Update as necessary*	
		Risks and Issues Log	*Update as necessary*	
			Testing Plan	
				Lessons Learned
				Project Sign Off
		Status Reports →	→	→
Medium Project Deliverables →	IT Project Request			
	Project Charter	*Update as necessary*	*Update as necessary*	
		Project Plan	*Update as necessary*	
(1 to 3 months of effort)		Project Requirements	*Update as necessary*	
		Risks and Issues Log	*Update as necessary*	
			Testing Plan	
				Lessons Learned
				Project Sign Off
		Status Reports →	→	→
Small Project Deliverables→	IT Project Request Form			
		Project Requirements	*Update as necessary*	
			Testing Plan	
(40 hours to 1 month of effort)				Project Sign Off
		Status Reports →	→	→

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

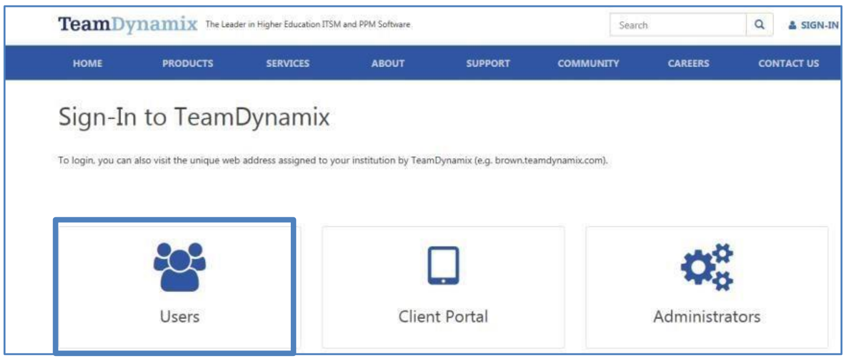
TEAMDYNAMIX INTERFACE

TEAMDYNAMIX INTERFACE

TeamDynamix Clients will access their request form from the **SERVICE link** on the **IT Project Services** webpage at: http://www.american.edu/oit/projects. 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)*.

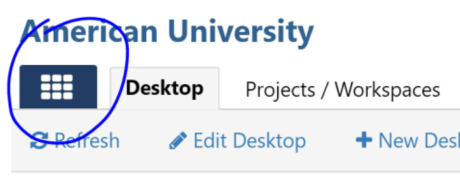
TeamDynamix users will access the interface from: https://american.teamdynamix.com/.

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

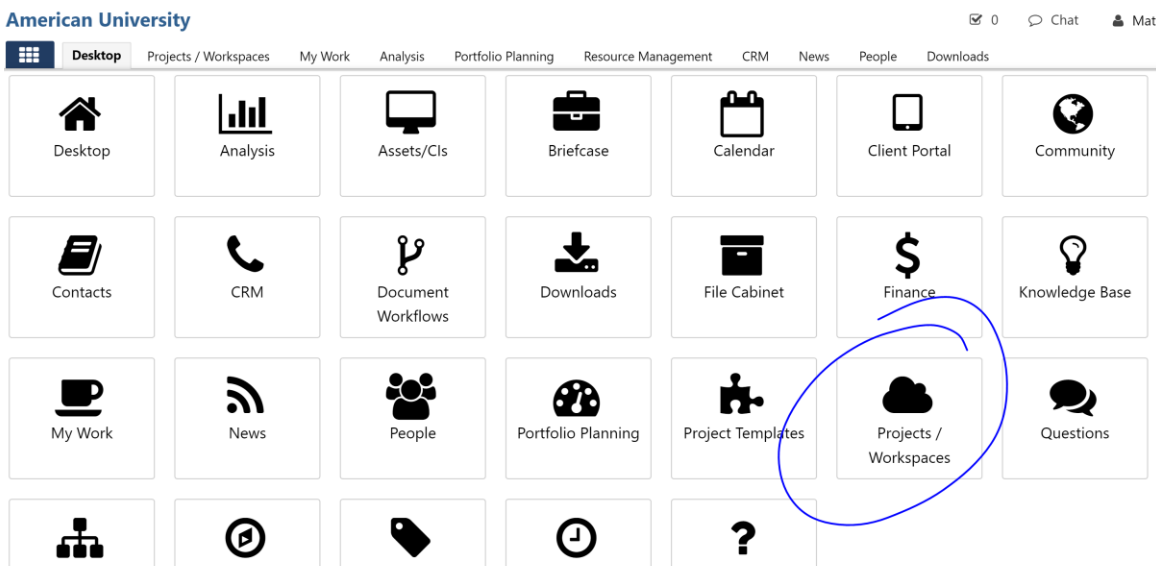


Next, you'll need to configure your **Project Desktop** and settings.

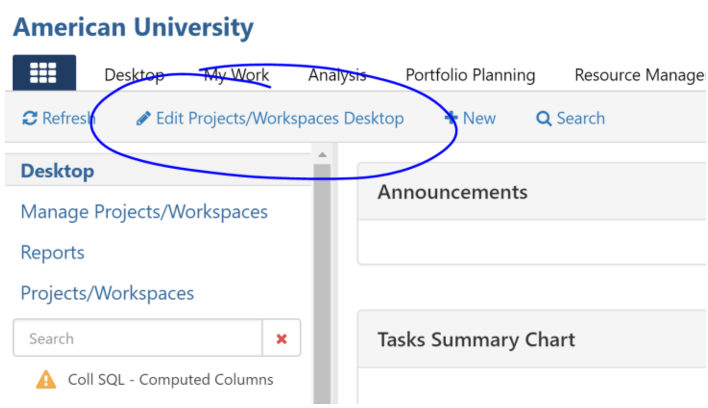
1. Click the blue **APPLICATIONS MENU** button, in the upper left corner of your screen.



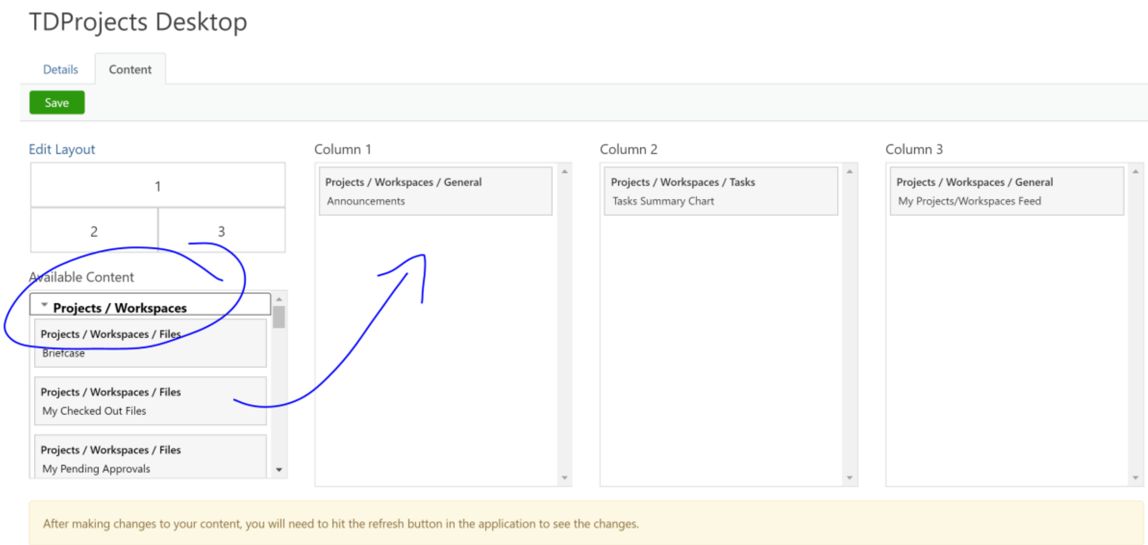
2. Click on the **PROJECT**S application.



3. Click the **Edit Projects Desktop** link.



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.**



SYSTEM SETTINGS SETUP

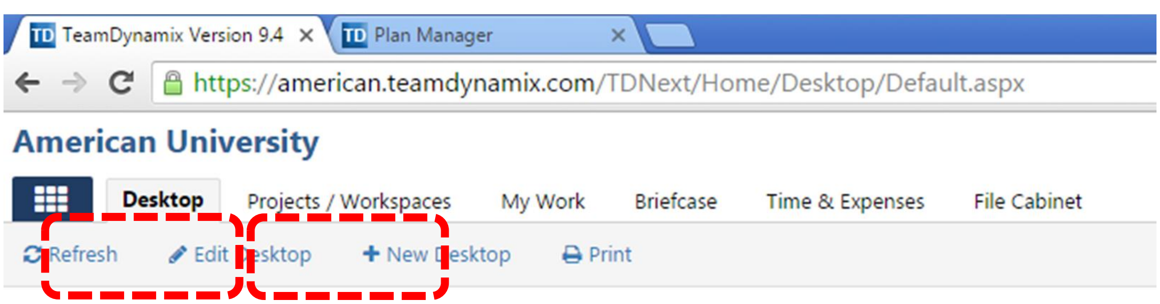
1. Click your name link in the upper right of the screen and select **VIEW MY PROFILE** from the dropdown selections.

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

TEAMDYNAMIX DESKTOP SETUP

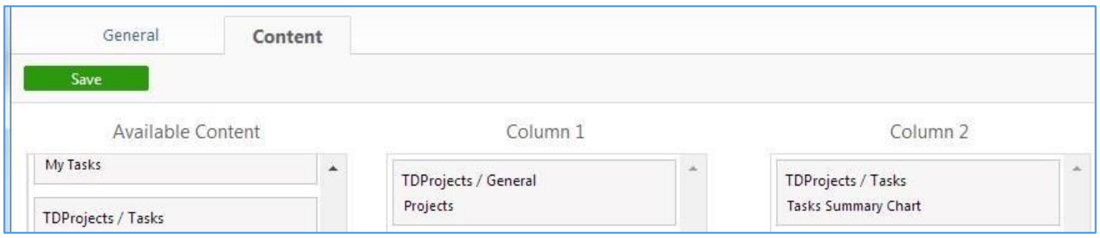
You will need to set up a **NEW DESKTOP** in TeamDynamix.

1. Click the **Edit Desktop** or **New Desktop** buttons to create your customized Desktop.
2.



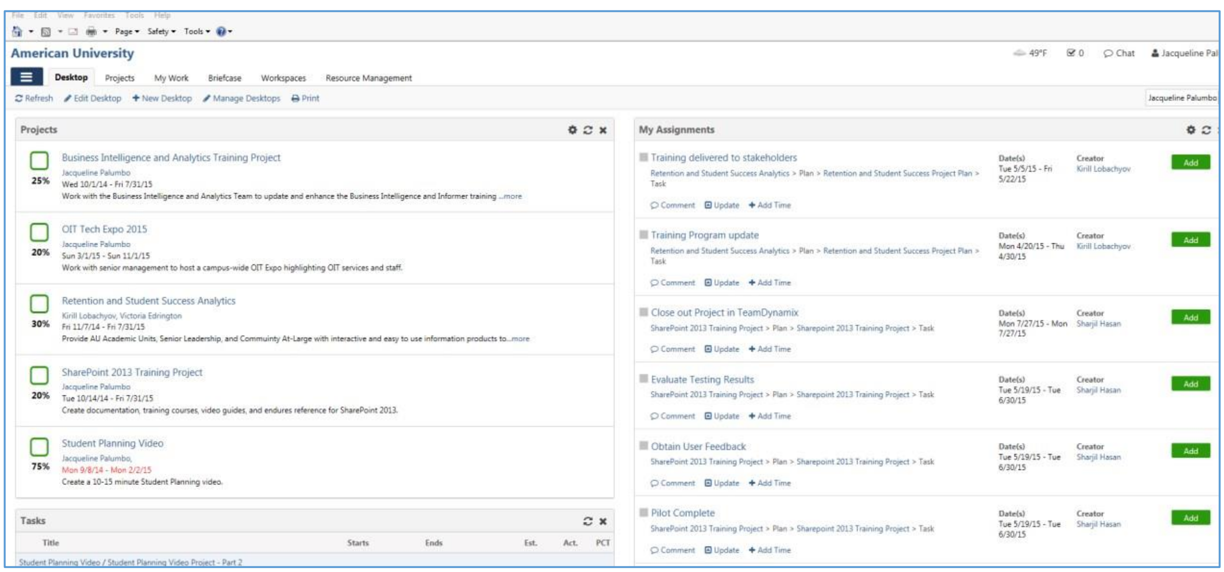
3. Enter a name for your **Desktop**, then click the **SAVE** button. You'll now need to add TD content widgets to your Desktop.

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.**



VIEWING YOUR ASSIGNED PROJECTS

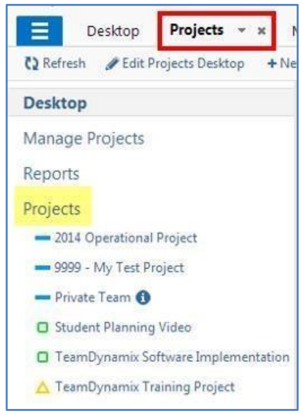
You will see a list of projects on your **Project Desktop** for which you are a resource. If you are not a resource, you will not see the project listed here.



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

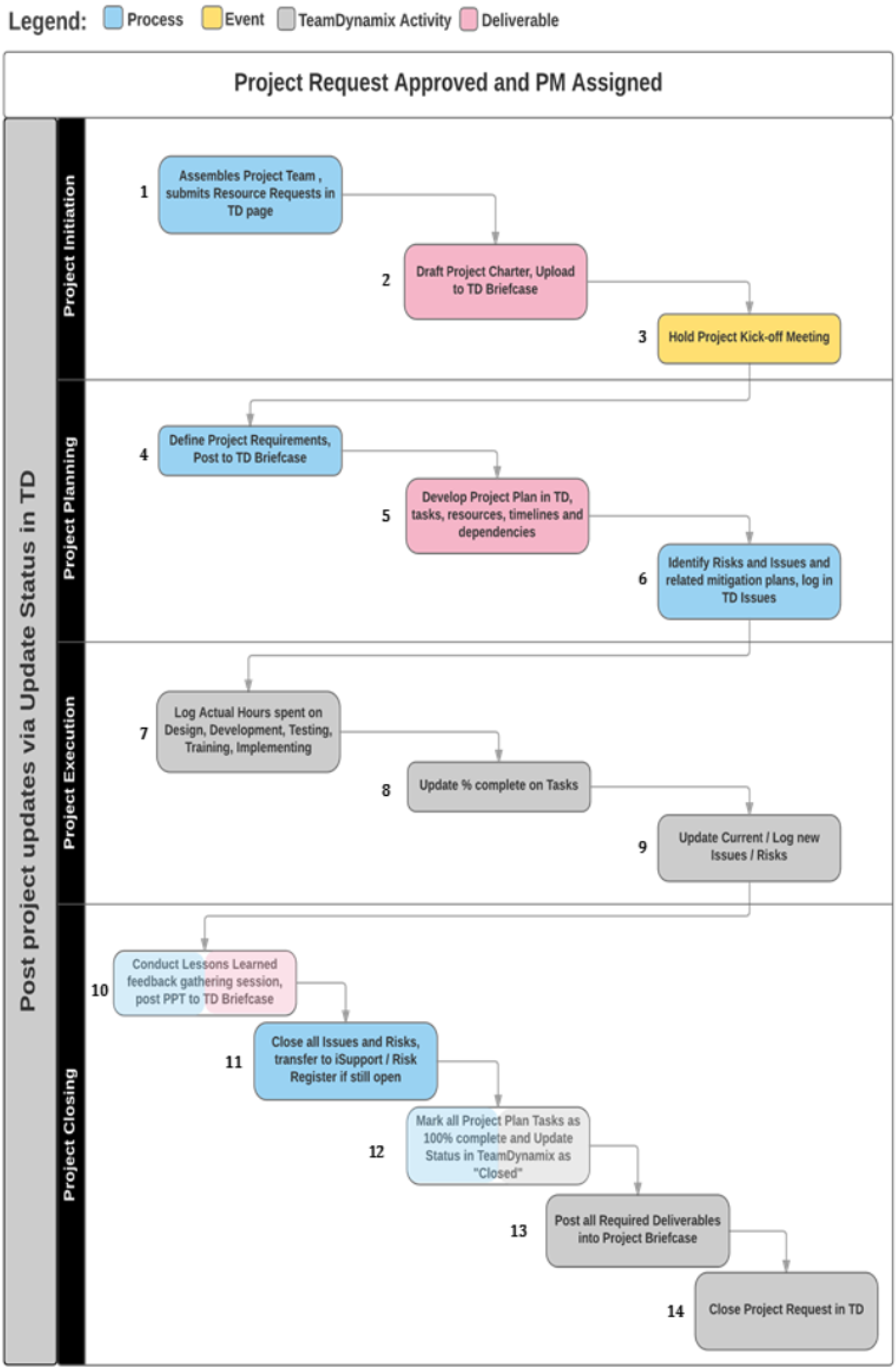
- Blue bar – project has not yet been given an status

- 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


Submit Project Request from american.edu/oit/projects
Reviews Request in TeamDynamix
Conduct Feasibility and Preliminary Resource Availability Assessments
Approves Request in TeamDynamix
Add Request to Proper Porfolio Year
Classifies Project as Large, Medium or Small
Project is based on Priority and Resources
Changes Project Status to "In Progress"
Assigns PM


Legend: Process Event TeamDynamix Activity Deliverable
Project Request Approved and PM Assigned
Post project updates via Update Status in TD
Project Initiation
1 Assembles Project Team , submits Resource Requests in TD page
2 Draft Project Charter, Upload to TD Briefcase
3 Hold Project Kick-off Meeting
Project Planning
4 Define Project Requirements, Post to TD Briefcase
5 Develop Project Plan in TD, tasks, resources, timelines and dependencies
6 Identify Risks and Issues and related mitigation plans, log in TD Issues
Project Execution
7 Log Actual Hours spent on Design, Development, Testing, Training, Implementing
8 Update % complete on Tasks
9 Update Current / Log new Issues / Risks
Project Closing
10 Conduct Lessons Learned feedback gathering session, post PPT to TD Briefcase
11 Close all Issues and Risks, transfer to iSupport / Risk Register if still open
12 Mark all Project Plan Tasks as 100% complete and Update Status in TeamDynamix as "Closed"
13 Post all Required Deliverables into Project Briefcase
14 Close Project Request in TD

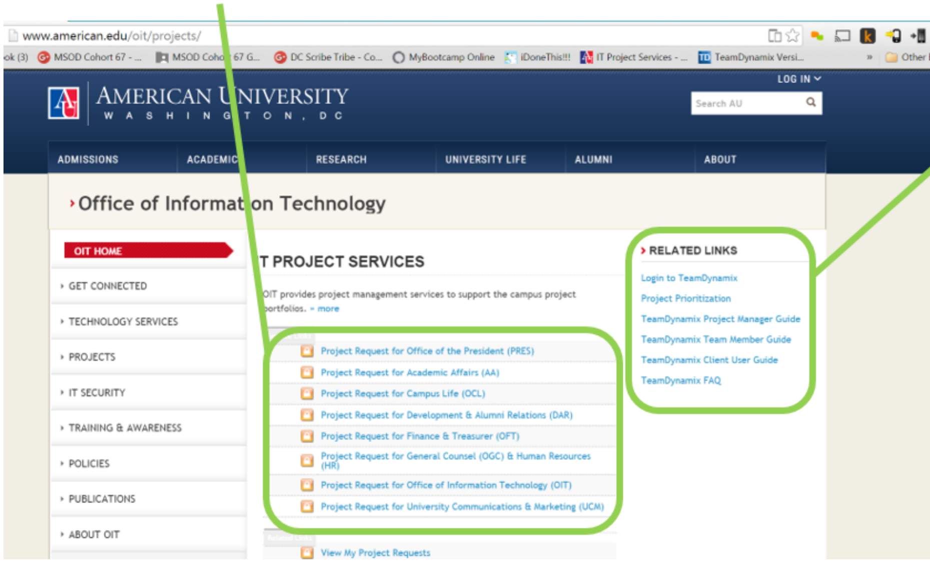
PROJECT SUBMISSION

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

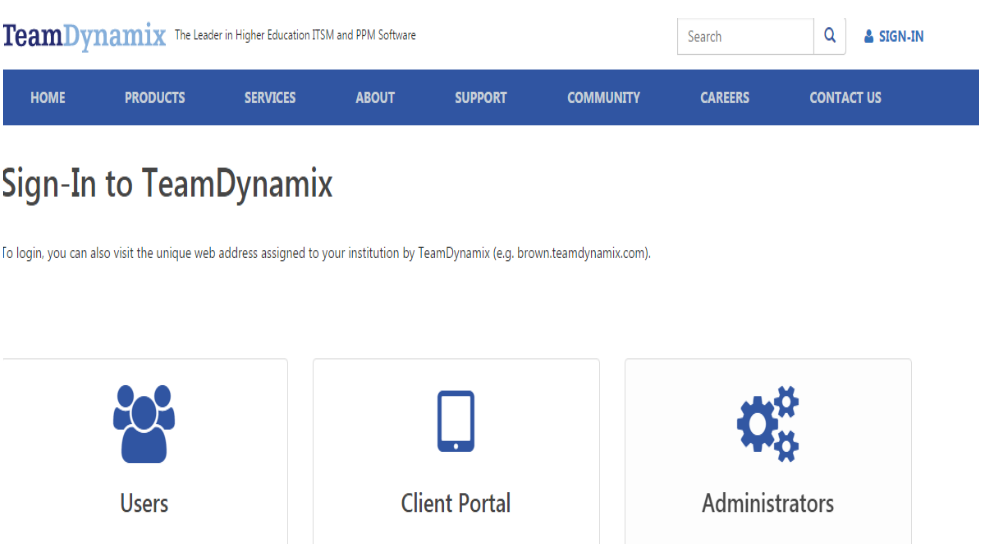
1 - Submit Project Request

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

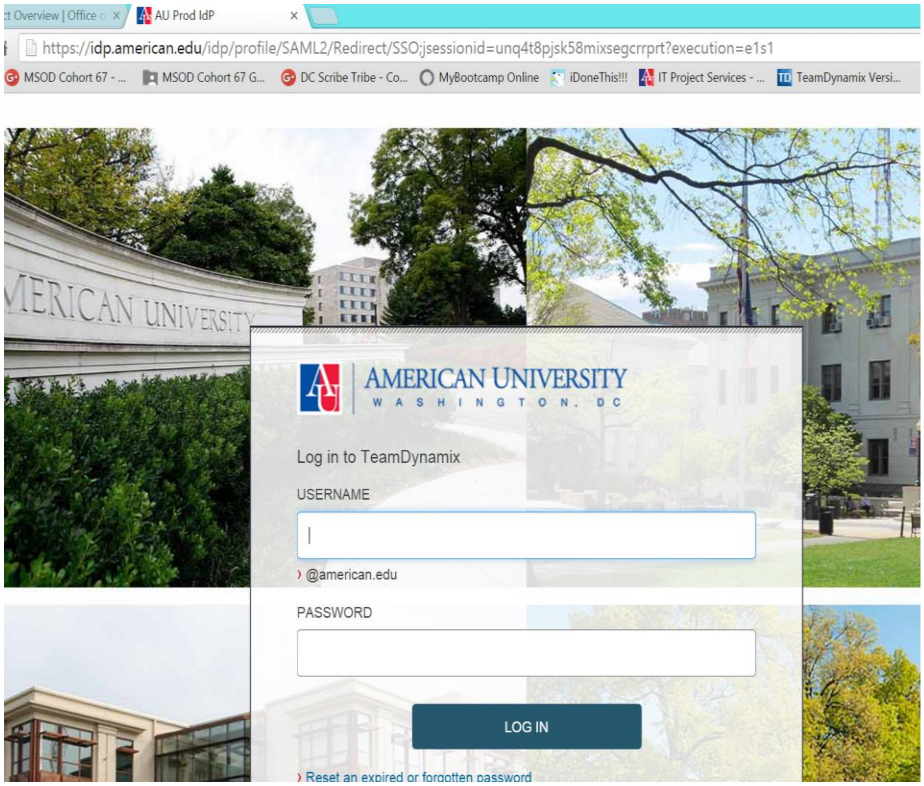
Review Users Guides, FAQ's and other Helpful Information in the Related Links section of this web page.



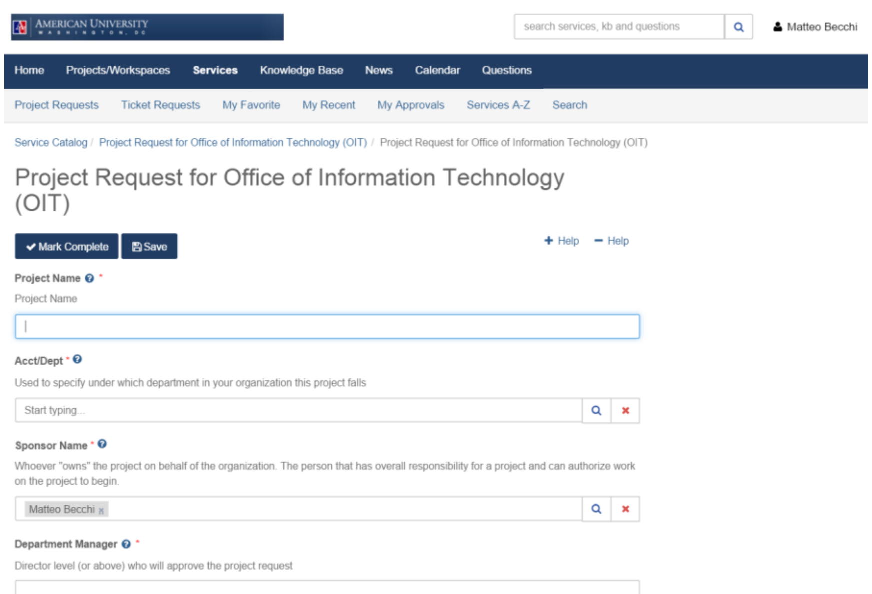
1. **Select "Users"**



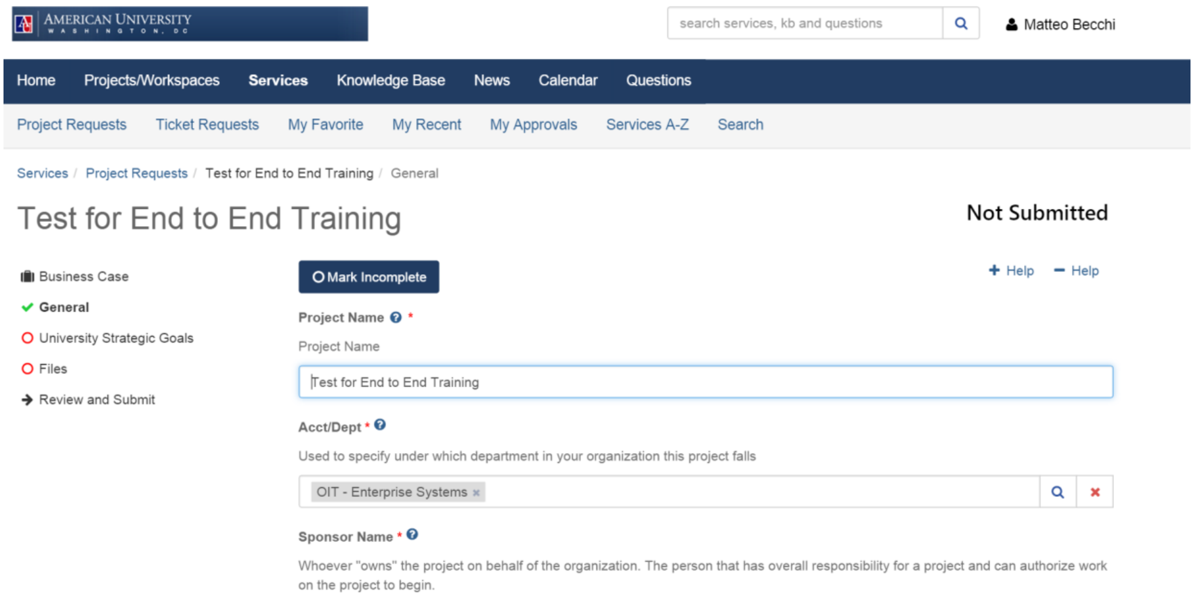
2. **Log into TeamDynamix Using your AU credentials**



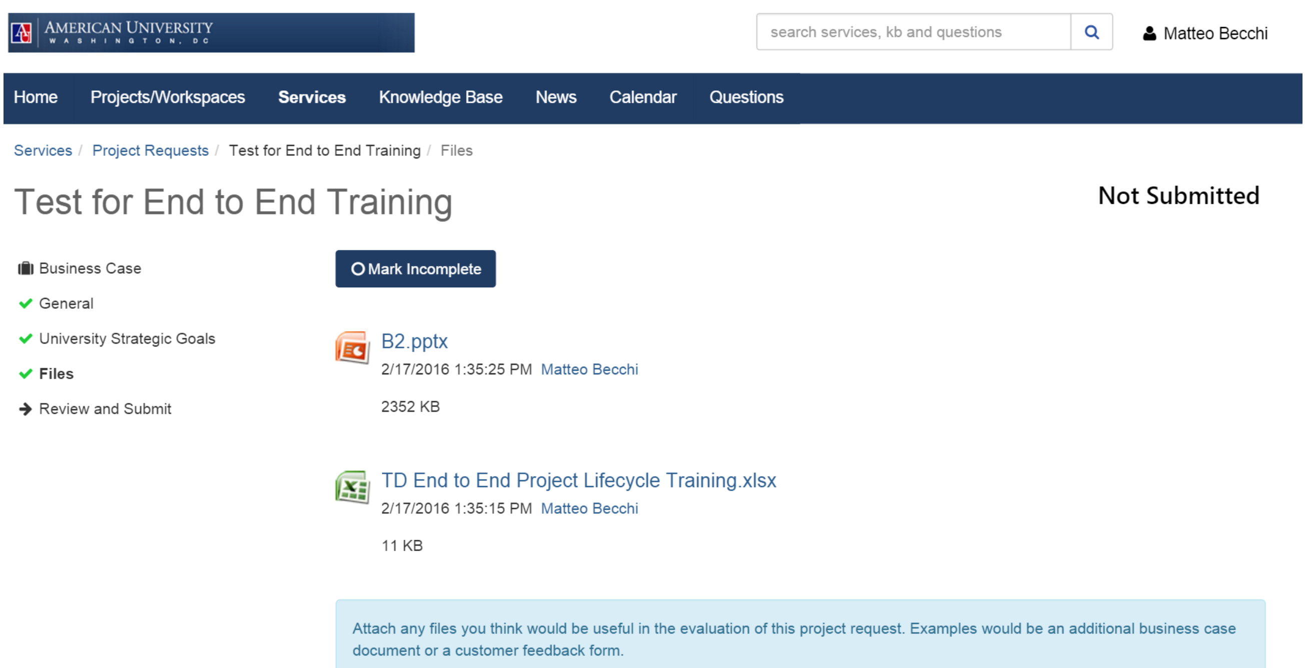
3. **Fill in the details of your project request; fields with a * are required.**



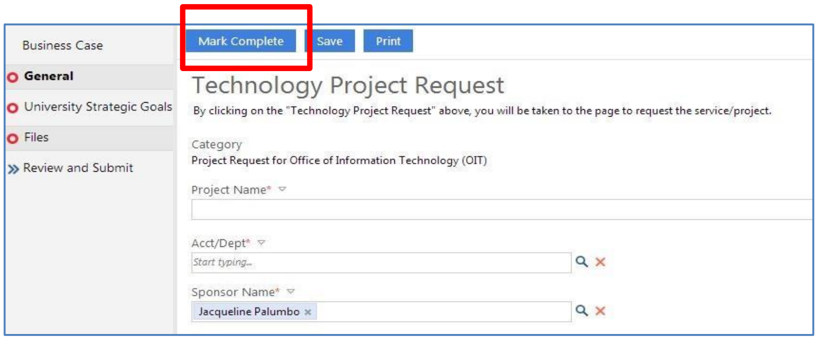
a **Enter your project name and Save:**



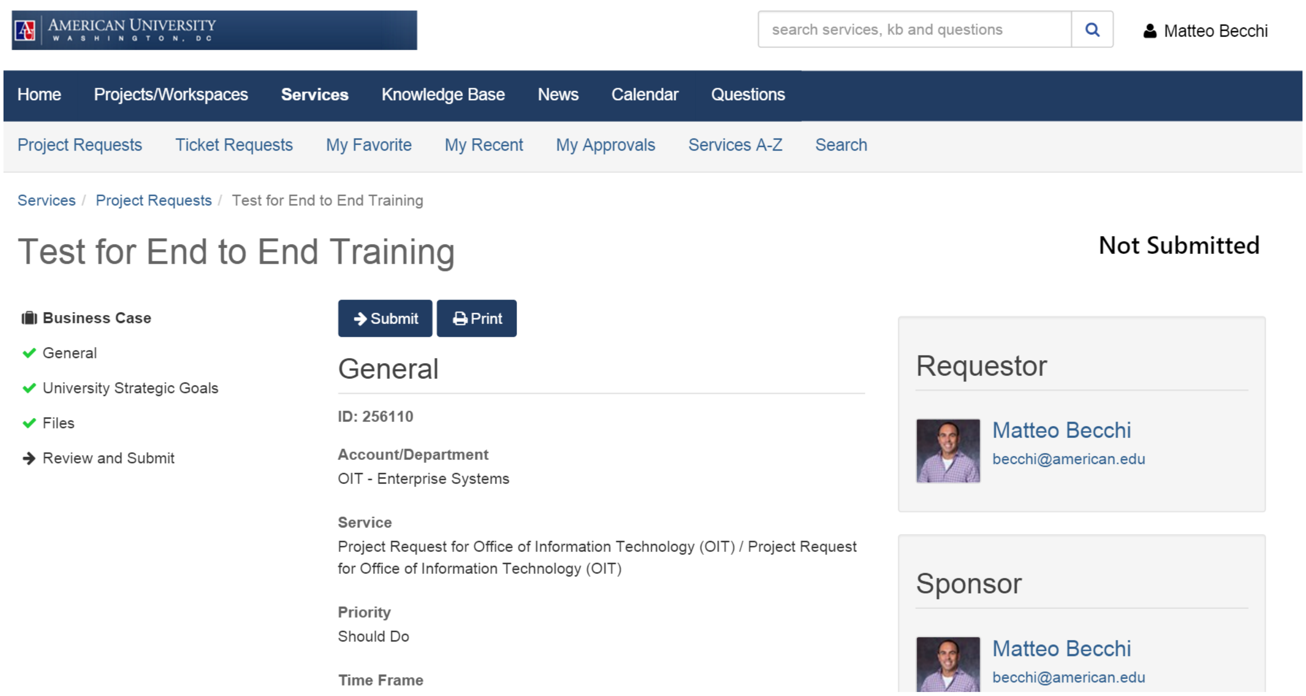
b **Attach files as appropriate**

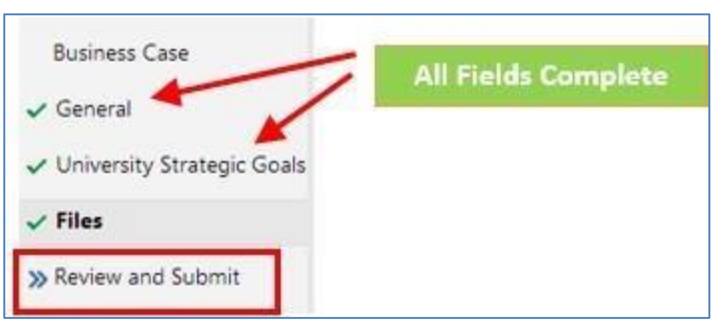


1. Once the form is complete, click the **MARK COMPLETE** button.



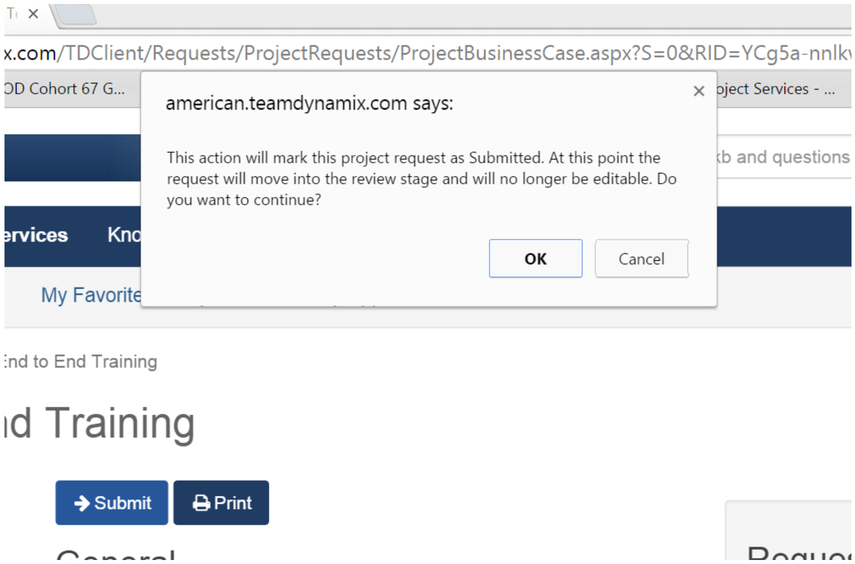
4. Review your project request information for accuracy and completeness, then click on **Submit**



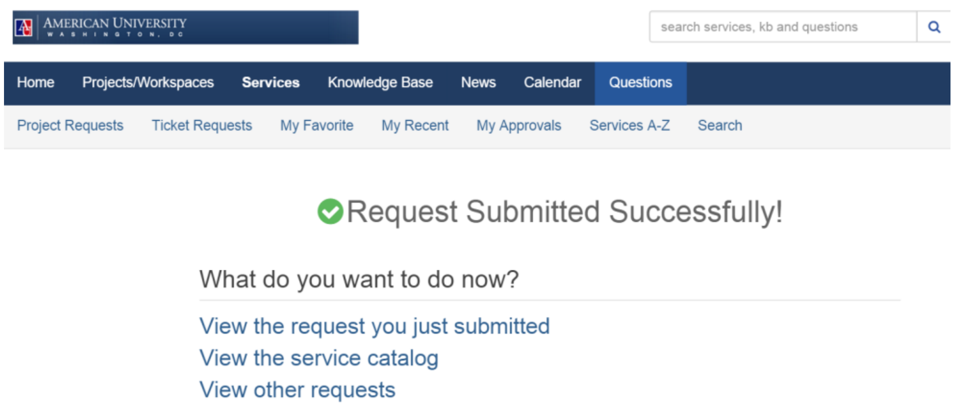


s

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



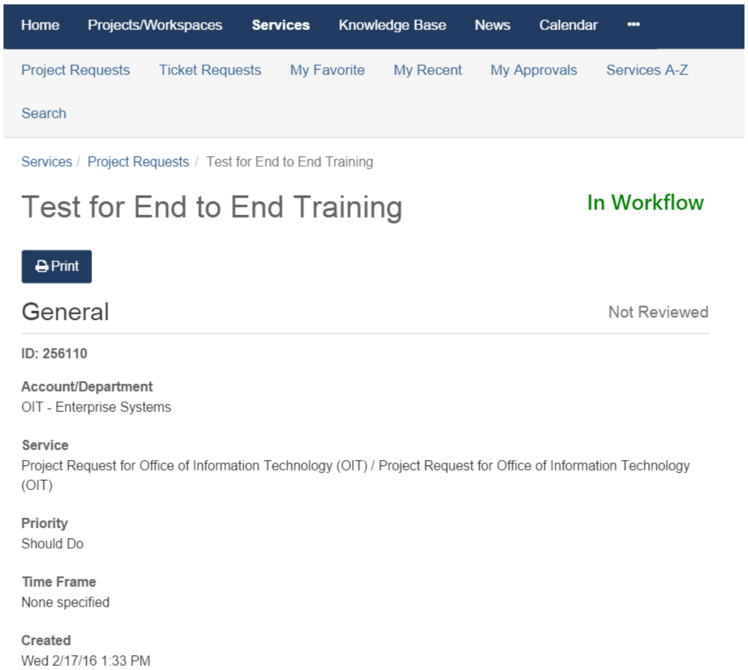
The system will confirm that your request was submitted successfully:



Note: 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.

1. 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 (https://american.teamdynamix.com/TDClient/Requests/ProjectRequests/).

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)

HN Hosein Nahidian <notify@teamdynamixapp.com>
Monday, September 19, 2016 at 4:30 PM
To: Sharjil Hasan

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
Type General / Portfolio - Office of Information Technology
Description Deployment of NetIQ Access Review to allow data custodians auditing and self service capability for granting and reviewing restricted permissions/access.
Workflow OIT Project Approval Workflow
Workflow Step Initial Request Review
Created Mon 9/19/16 4:28 PM Eastern Daylight Time by Hosein Nahidian
Evaluator Sharjil Hasan
Time Frame None Specified
Budget $0.00
TDNext https://american.teamdynamix.com/TDNext/Apps/Portfolios/ProjectExplorer.aspx?RID=I~WDWuDLB6c_

TeamDynamix Request Submitted (Access Review)

HN Hosein Nahidian <notify@teamdynamixapp.com>
Monday, September 19, 2016 at 4:30 PM
To: Sharjil Hasan

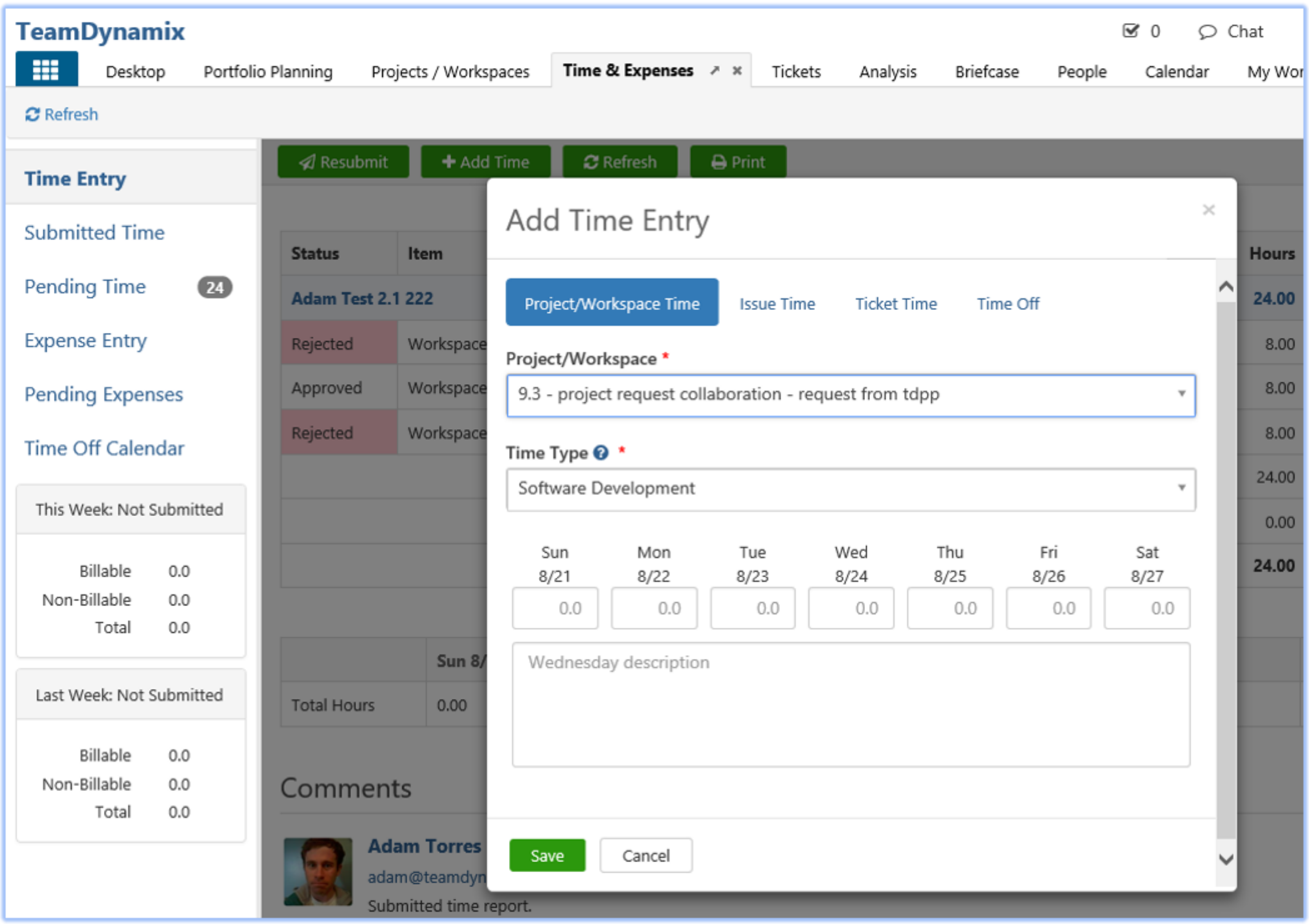
Details
Hosein Nahidian submitted this project request on Mon 9/19/16 4:30 PM Eastern Daylight Time. It was automatically assigned to the "OIT Project Approval Workflow" workflow.

Project Request Details
Project Access Review
Acct/Dept OIT - Enterprise Systems
Type General / Portfolio - Office of Information Technology
Description Deployment of NetIQ 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=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.



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

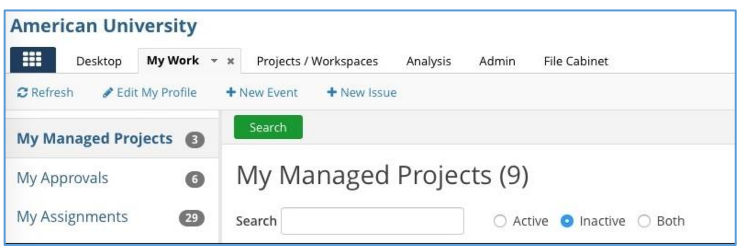
The Portfolio Manager should use the following steps to evaluate a project request that has workflow:

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.

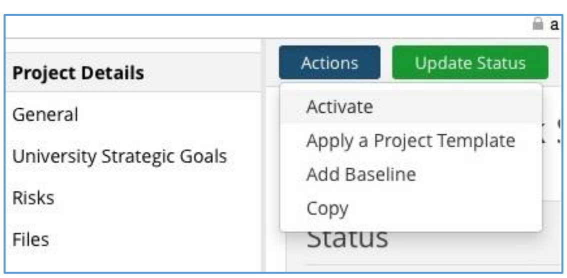
ACTIVATING A PROJECT

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.

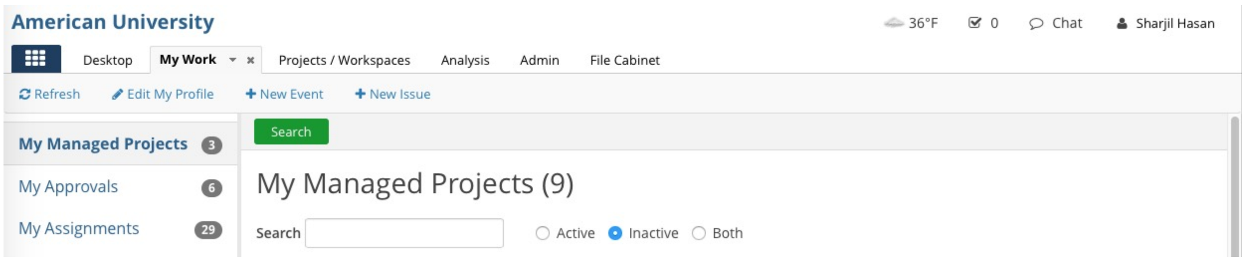


4. Click on the project that needs to be active. The **Project Details** window will display.
5. In the **Project Details** window, click the **ACTIONS** icon and select **ACTIVATE**. The project is now activated.

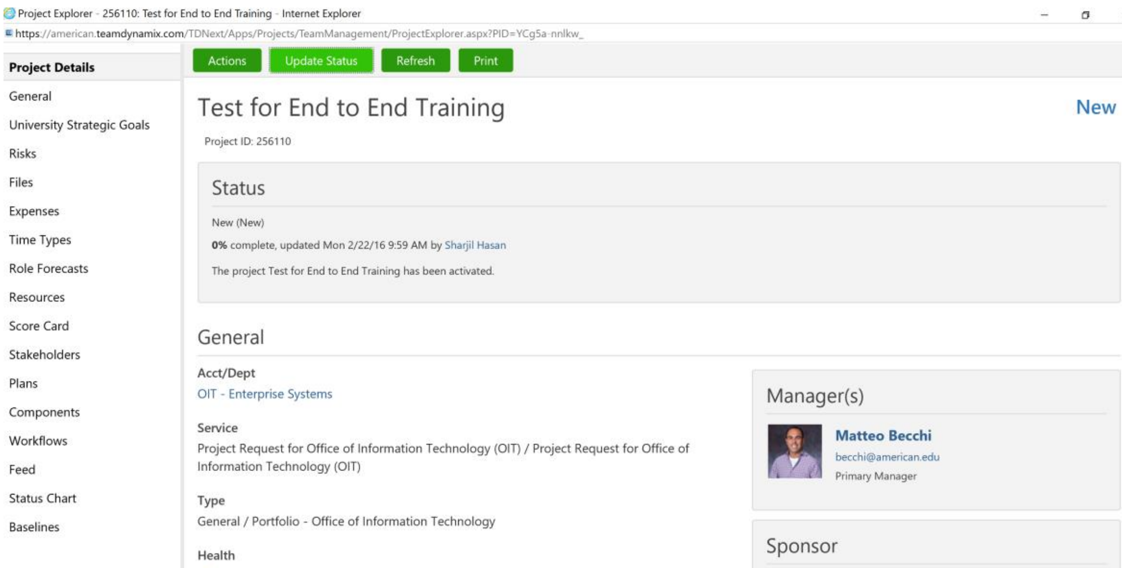


a **Go to My Work application**

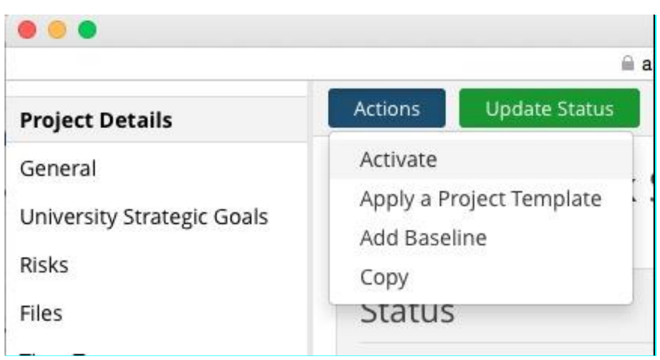
b **Click on 'My Managed Projects' in the left navigation menu** c **Select the 'Inactive' option and click on the 'Search' icon**



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

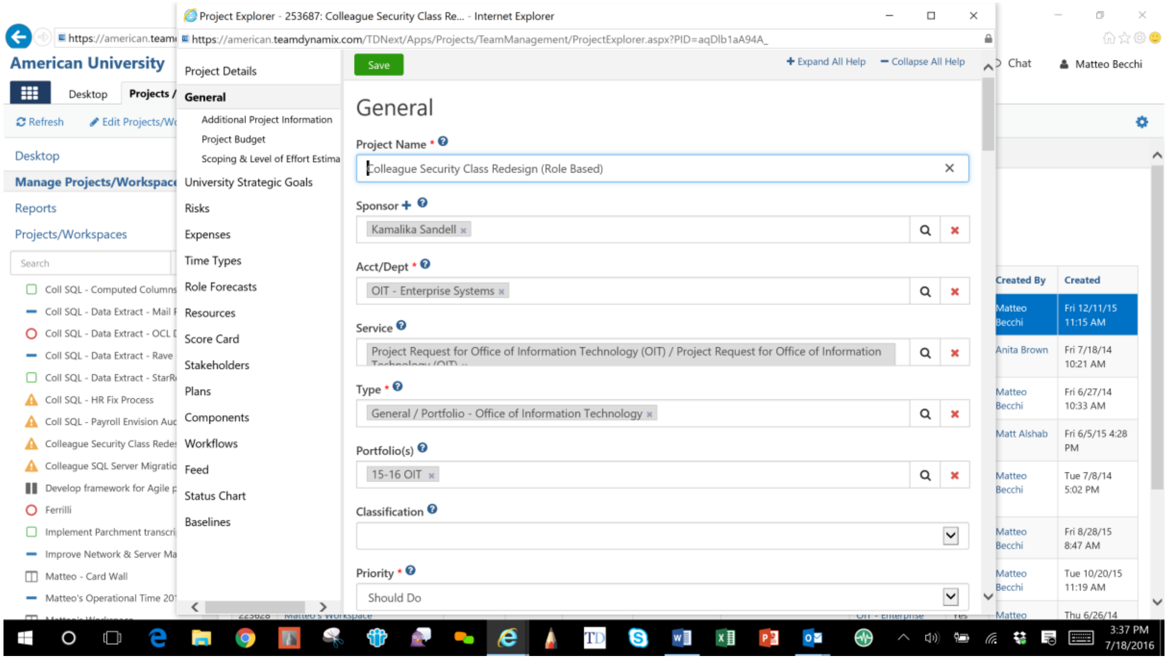


d **5. In the Project Details window, click the 'Actions' icon and select 'Activate.' The project is now activated.**

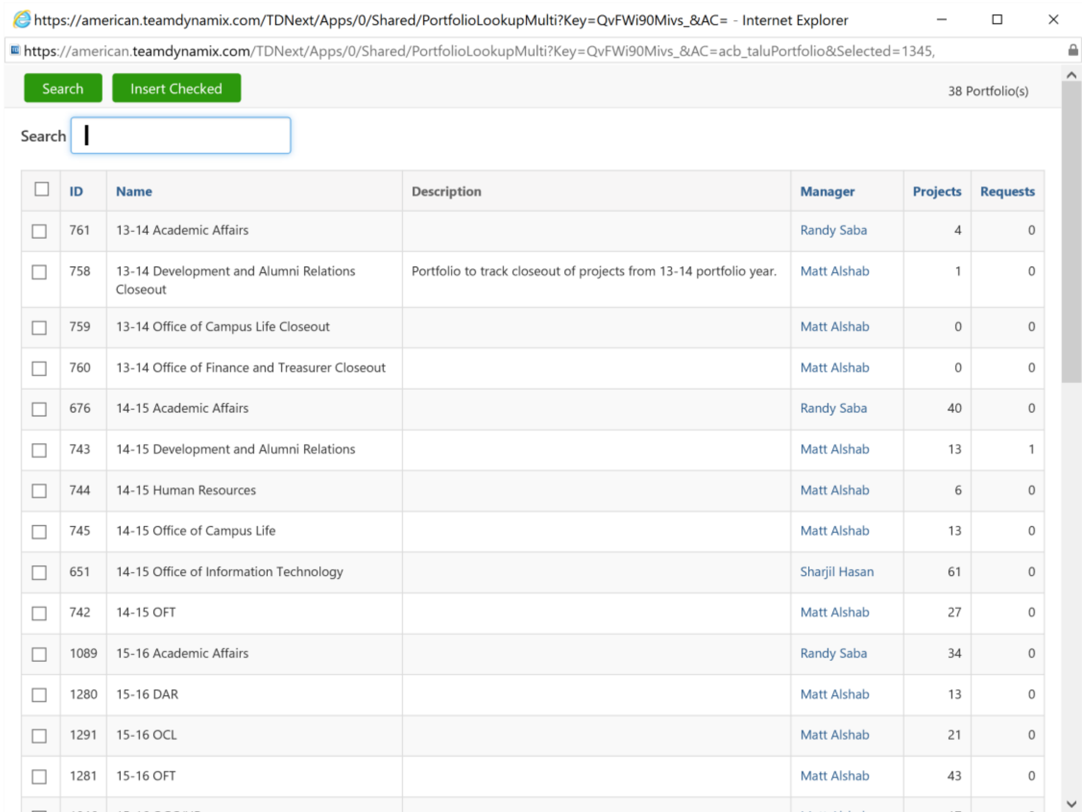


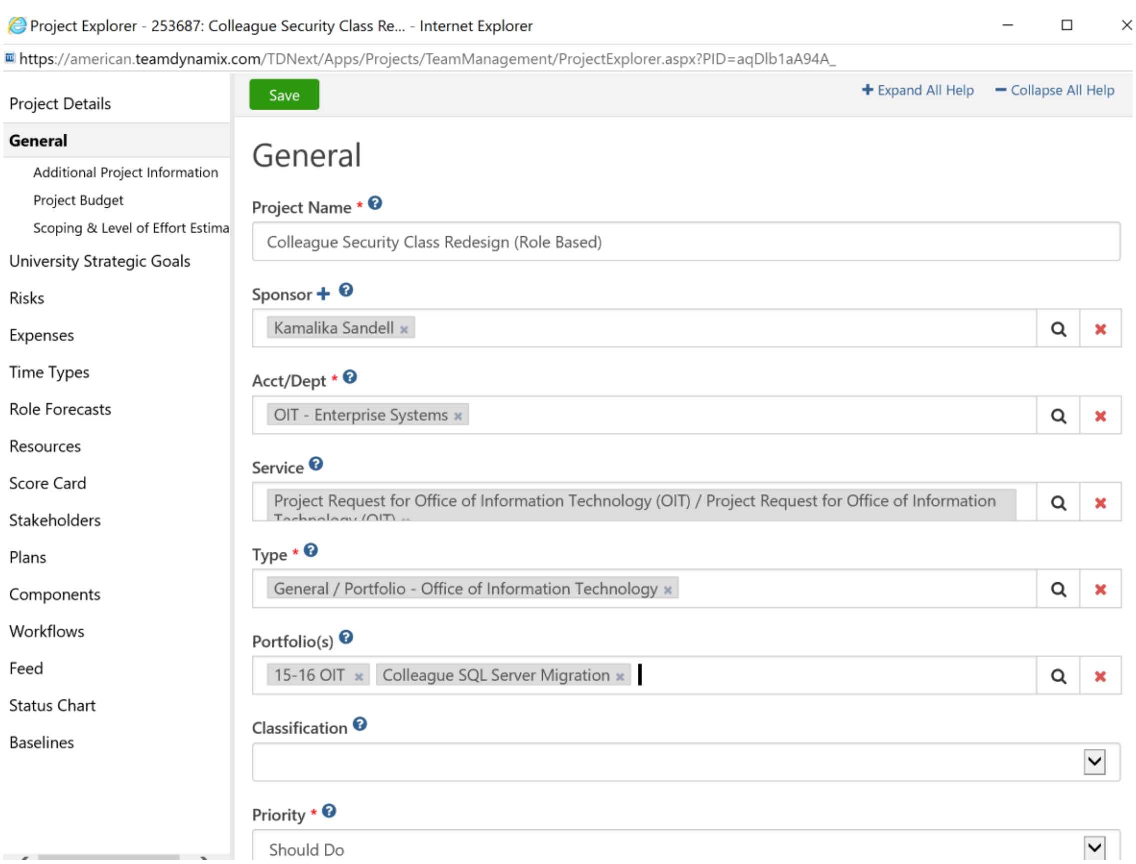
5. **Add request to proper Portfolio Year ("current" for this exercise)**

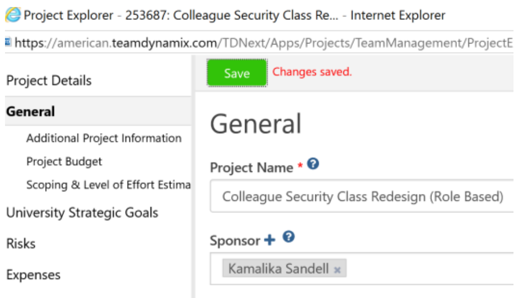
Within your project, click the General tab, scroll down to Portfolio(s) and click on the Search icon



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

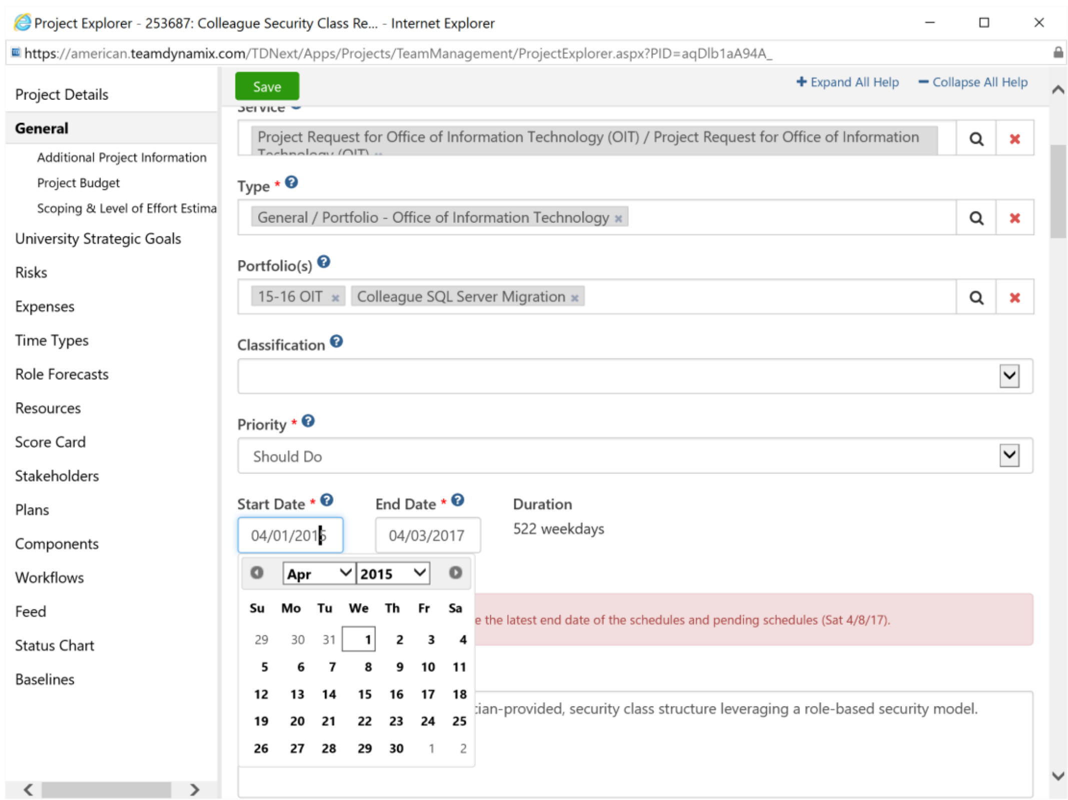

https://american.teamdynamix.com/TDNext/Apps/0/Shared/PortfolioLookupMulti?Key=QvFWi90Mivs_&AC= - Internet Explorer
https://american.teamdynamix.com/TDNext/Apps/0/Shared/PortfolioLookupMulti?Key=QvFWi90Mivs_&AC=acb_taluPortfolio&Selected=1345,
Search
Insert Checked
38 Portfolio(s)
Search
ID | Name | 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


Project Explorer - 253687: Colleague Security Class Re... - Internet Explorer
https://american.teamdynamix.com/TDNext/Apps/Projects/TeamManagement/ProjectExplorer.aspx?PID=aqDlb1aA94A_
Project Details
General
Additional Project Information
Project Budget
Scoping & Level of Effort Estima
University Strategic Goals
Risks
Expenses
Time Types
Role Forecasts
Resources
Score Card
Stakeholders
Plans
Components
Workflows
Feed
Status Chart
Baselines
Save
Expand All Help
Collapse All Help
General
Project Name *
Colleague Security Class Redesign (Role Based)
Sponsor
Kamalika Sandell
Acct/Dept *
OIT - Enterprise Systems
Service
Project Request for Office of Information Technology (OIT) / Project Request for Office of Information
Type *
General / Portfolio - Office of Information Technology
Portfolio(s)
15-16 OIT
Colleague SQL Server Migration
Classification
Priority *
Should Do



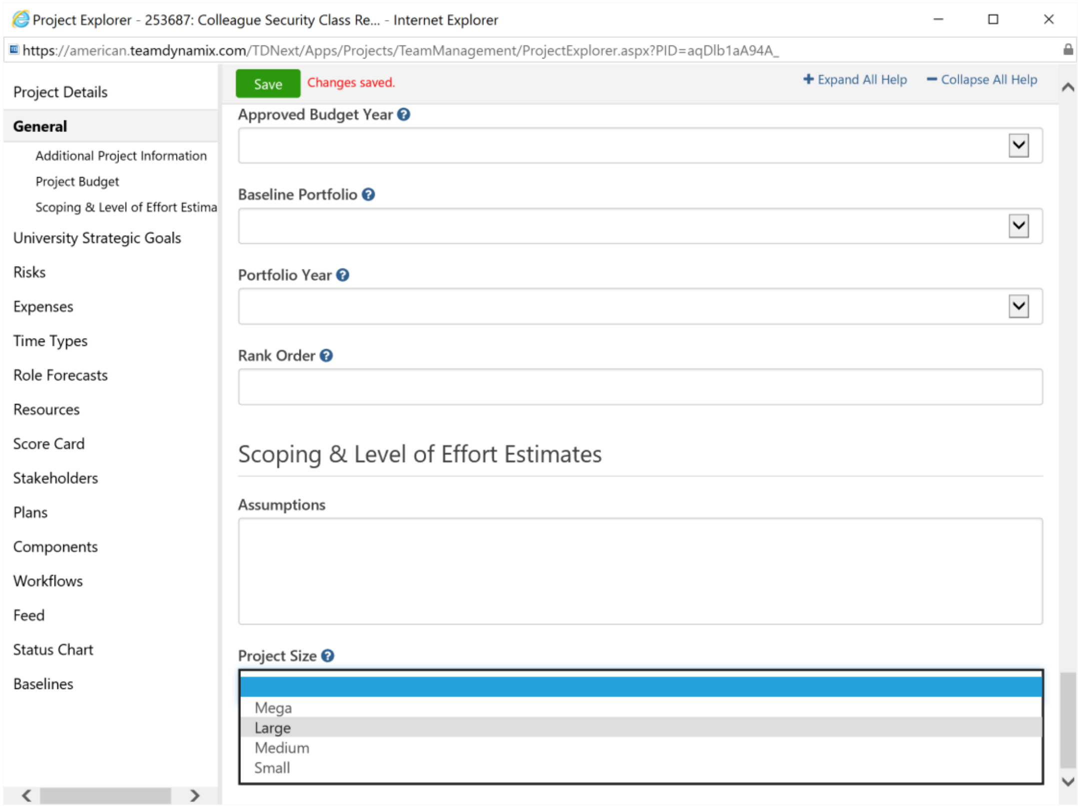
6. **Project is Scheduled based on Priority and Resources**

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



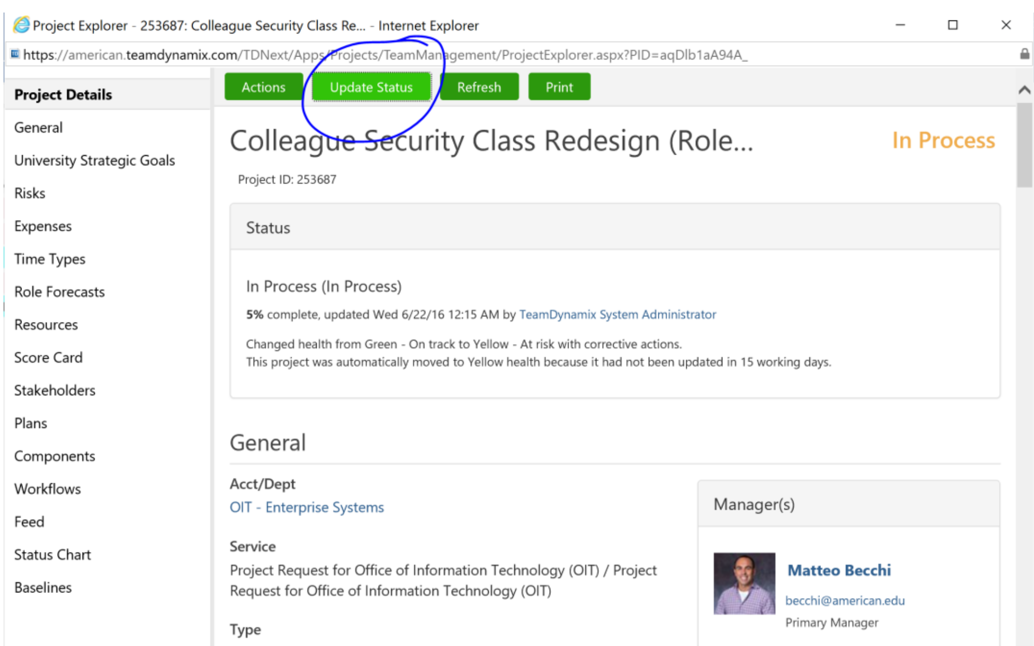
7. **Classifies Project as Large // Medium // Small**

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

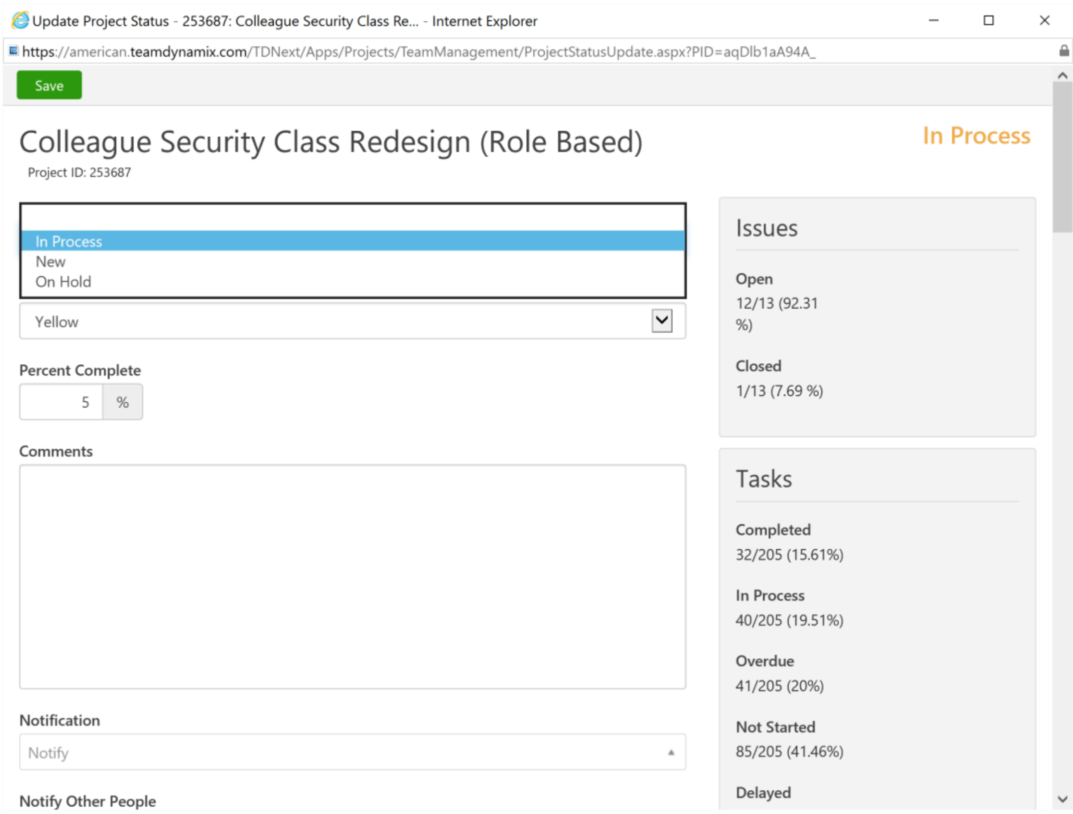


8. **Changes Project Status to "In Progress"**

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

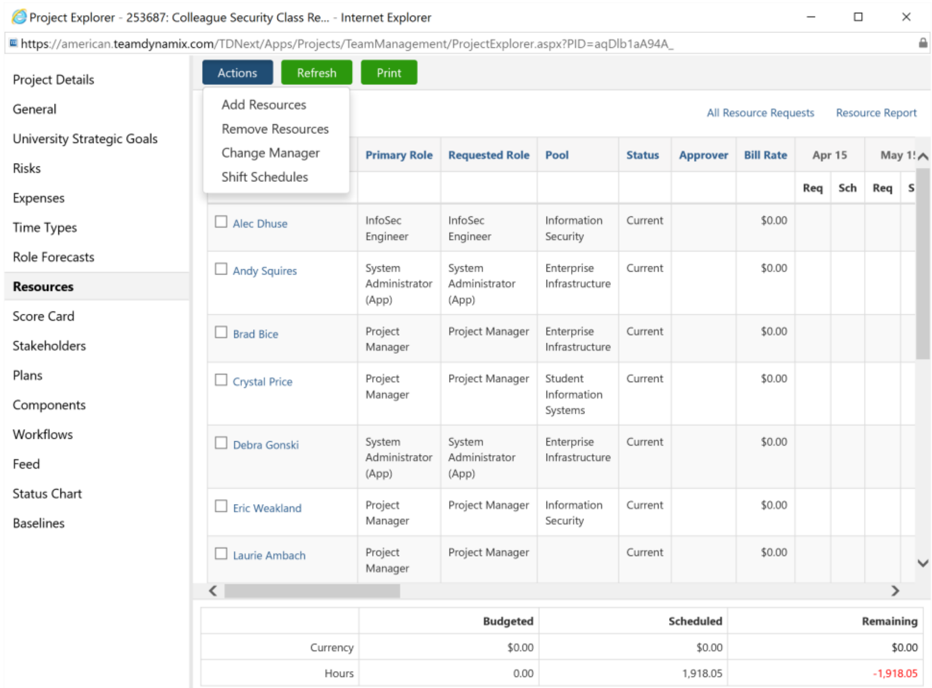


Select "In Process" from the New Status pull-down menu (top of the screen), adjust health and % complete as appropriate, and add in any comments, and notifications you deem necessary to announce the activation of your project:

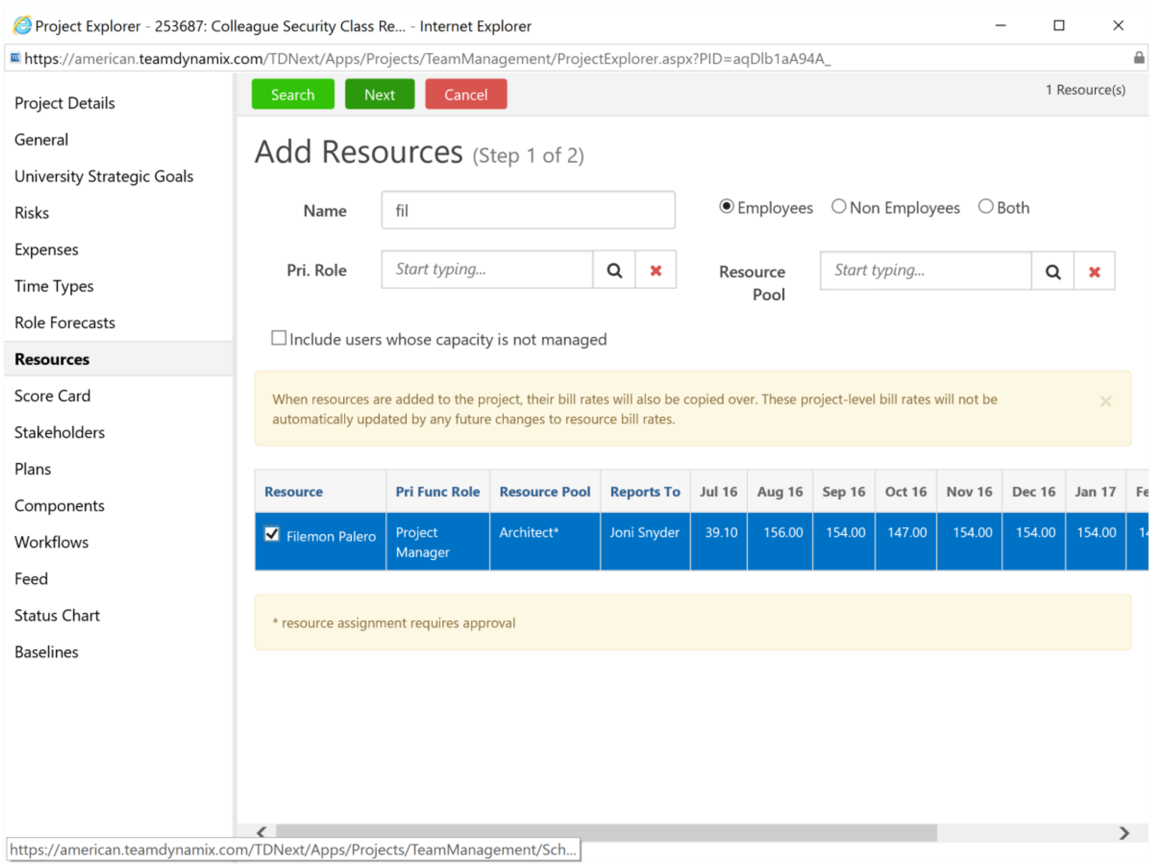


9. **Assigns PM**

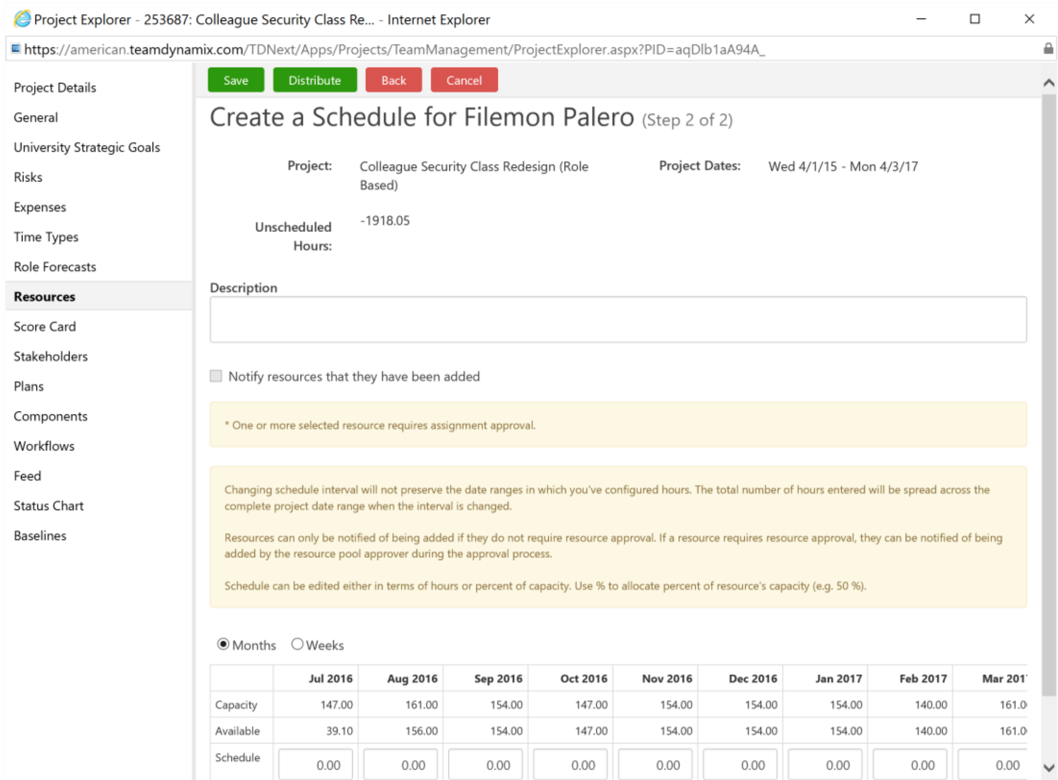
From the Resources tab, select Add Resources from the Actions button (top of your screen)



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.



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



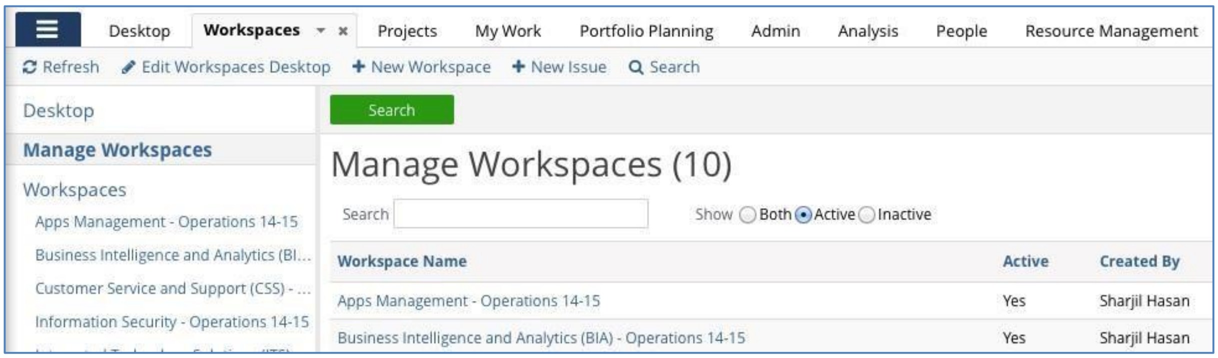
**** Once the resource's manager approves your resource request you will see that resource's name appear in the Resource tab of your project, with a Role of Project Manager. ****

FULFILLING YOUR OBLIGATIONS AS A PROJECT MANAGER

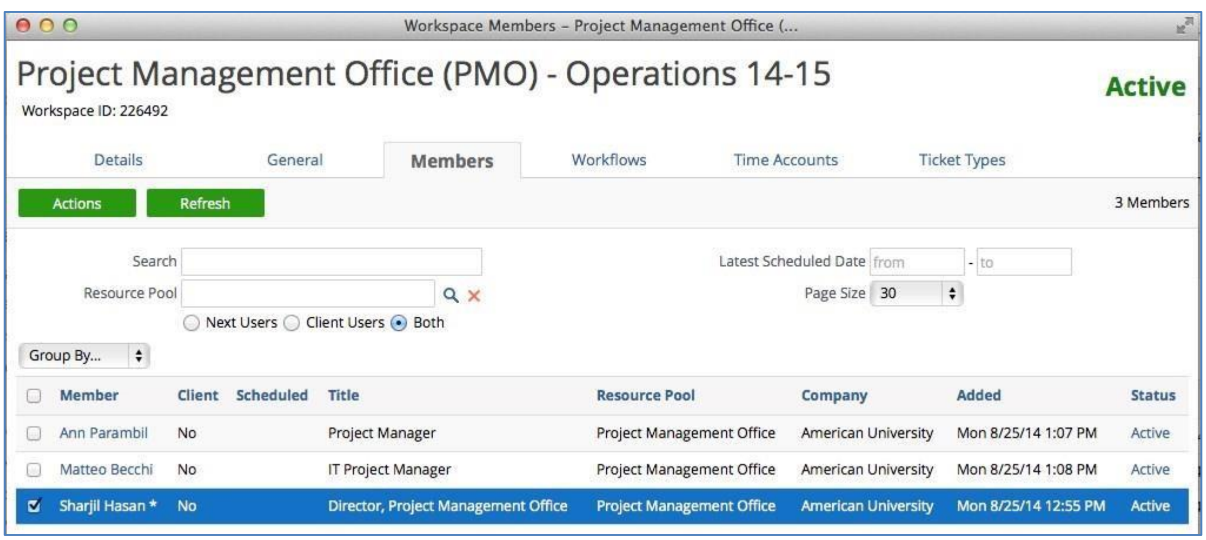
SETTING UP THE OPERATIONAL WORKSPACE

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 prior to assigning resources or tasks to a project.

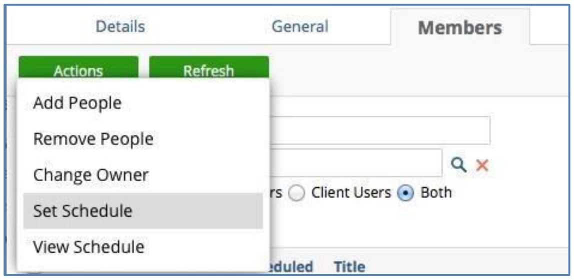
1. Go to the **Workspaces Application**.
2. Click on **MANAGE WORKSPACES** in the left navigation pane.



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



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**.



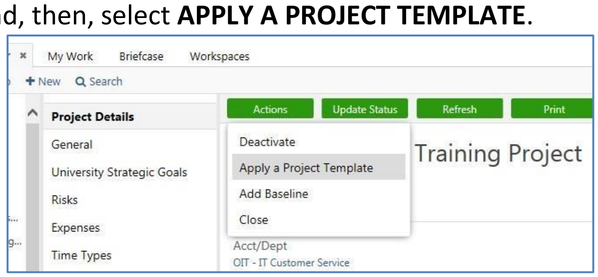
7. Specify the time as **Hours** or as a **Percent of Resource's Capacity**.

8. Click **SAVE**.

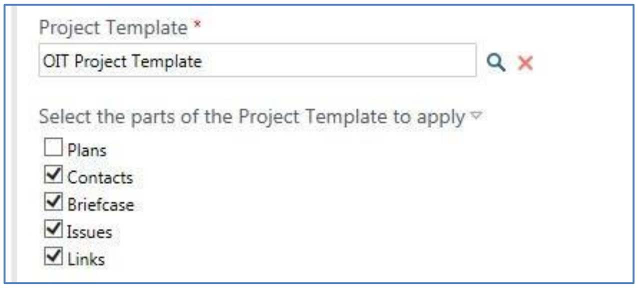
APPLYING A TEMPLATE TO THE PROJECT

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**.

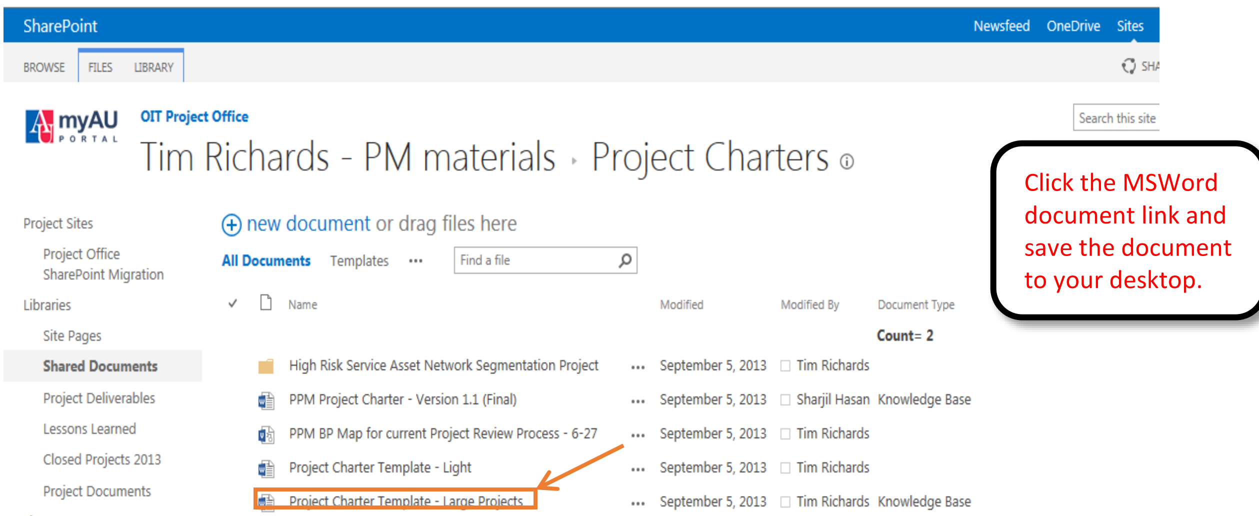


3. Click the **SEARCH** button. Select the **OIT Project Template**. You can also deselect any parts of the Project Template that you do not wish to use, for example the **Plans**.

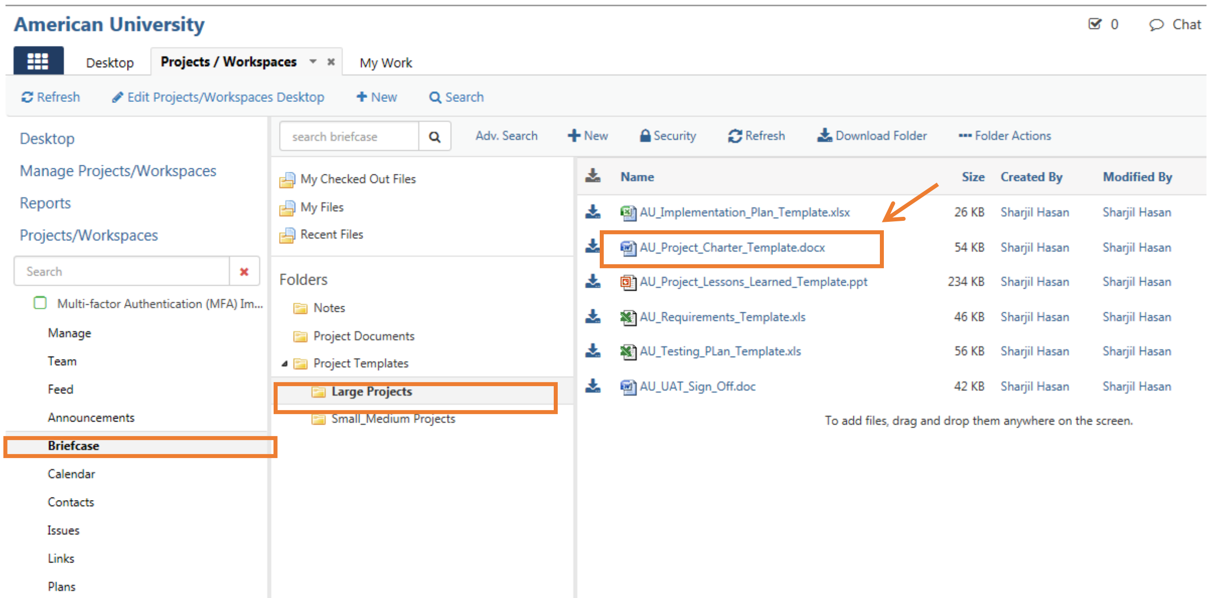


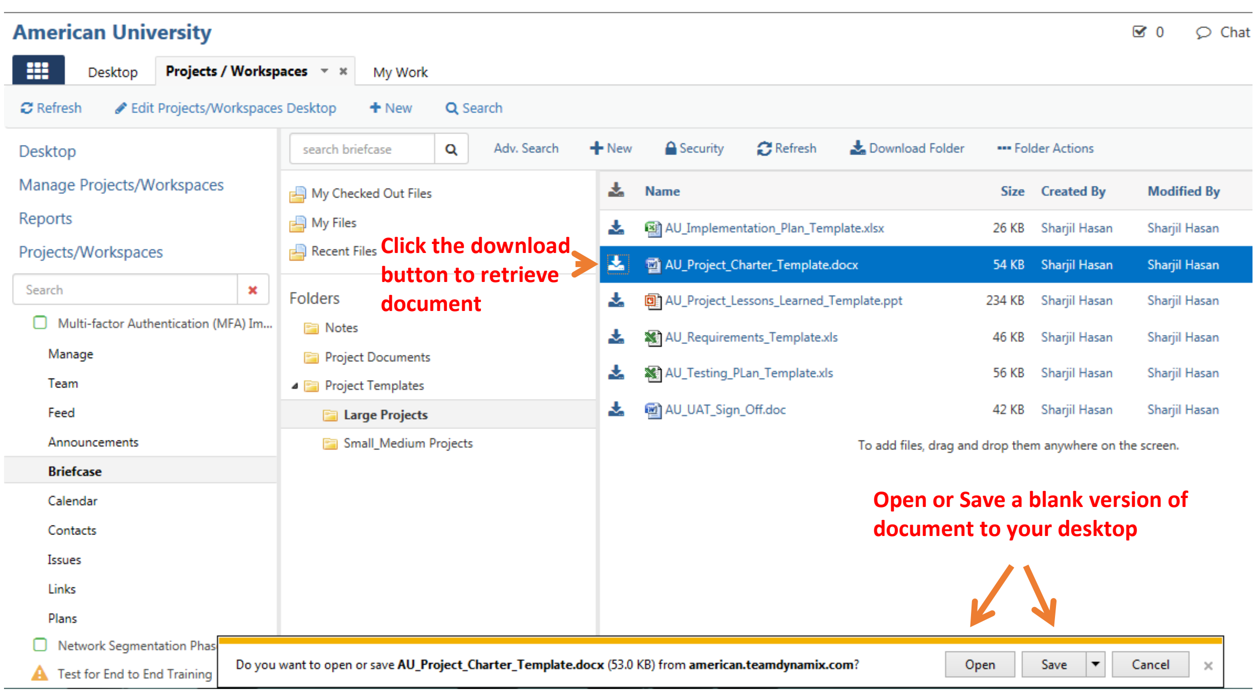
DRAFT PROJECT CHARTER, UPLOAD TO TD BRIEFCASE

1. 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



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


American University
0
Chat
Desktop
Projects / Workspaces
My Work
Refresh
Edit Projects/Workspaces Desktop
New
Search
Desktop
Manage Projects/Workspaces
Reports
Projects/Workspaces
Search
Multi-factor Authentication (MFA) Im...
Manage
Team
Feed
Announcements
Briefcase
Calendar
Contacts
Issues
Links
Plans
search briefcase
Adv. Search
New
Security
Refresh
Download Folder
Folder Actions
My Checked Out Files
My Files
Recent Files
Folders
Notes
Project Documents
Project Templates
Large Projects
Small_Medium Projects
Name
Size
Created By
Modified By
AU_Implementation_Plan_Template.xlsx 26 KB Sharjil Hasan Sharjil Hasan
AU_Project_Charter_Template.docx 54 KB Sharjil Hasan Sharjil Hasan
AU_Project_Lessons_Learned_Template.ppt 234 KB Sharjil Hasan Sharjil Hasan
AU_Requirements_Template.xls 46 KB Sharjil Hasan Sharjil Hasan
AU_Testing_PLan_Template.xls 56 KB Sharjil Hasan Sharjil Hasan
AU_UAT_Sign_Off.doc 42 KB Sharjil Hasan Sharjil Hasan
To add files, drag and drop them anywhere on the screen.


American University
0
Chat
Desktop
Projects / Workspaces
My Work
Refresh
Edit Projects/Workspaces Desktop
New
Search
Desktop
Manage Projects/Workspaces
Reports
Projects/Workspaces
Search
Multi-factor Authentication (MFA) Im...
Manage
Team
Feed
Announcements
Briefcase
Calendar
Contacts
Issues
Links
Plans
Network Segmentation Phas
Test for End to End Training
search briefcase
Adv. Search
New
Security
Refresh
Download Folder
Folder Actions
My Checked Out Files
My Files
Recent Files
Click the download button to retrieve document
Folders
Notes
Project Documents
Project Templates
Large Projects
Small_Medium Projects
Name
Size
Created By
Modified By
AU_Implementation_Plan_Template.xlsx 26 KB Sharjil Hasan Sharjil Hasan
AU_Project_Charter_Template.docx 54 KB Sharjil Hasan Sharjil Hasan
AU_Project_Lessons_Learned_Template.ppt 234 KB Sharjil Hasan Sharjil Hasan
AU_Requirements_Template.xls 46 KB Sharjil Hasan Sharjil Hasan
AU_Testing_PLan_Template.xls 56 KB Sharjil Hasan Sharjil Hasan
AU_UAT_Sign_Off.doc 42 KB Sharjil Hasan Sharjil Hasan
To add files, drag and drop them anywhere on the screen.
Open or Save a blank version of document to your desktop
Do you want to open or save AU_Project_Charter_Template.docx (53.0 KB) from american.teamdynamix.com?
Open
Save
Cancel

2. Project Charter Table of Contents

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

Table of Contents

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....

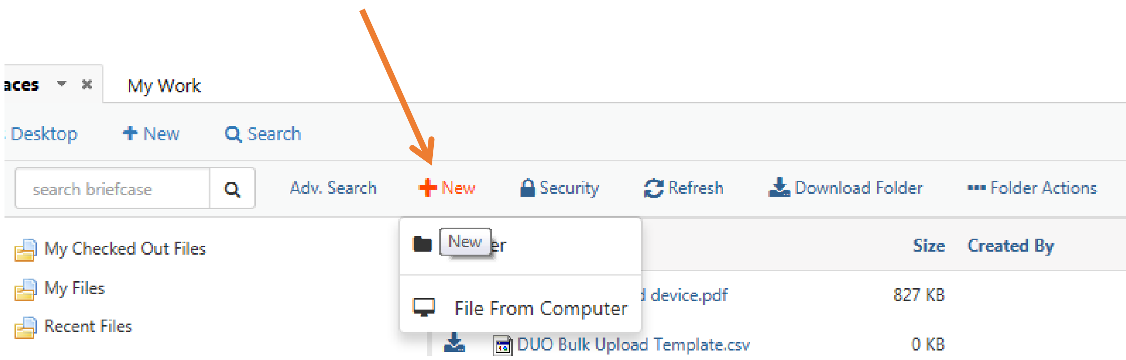
6.2. Project Rationale

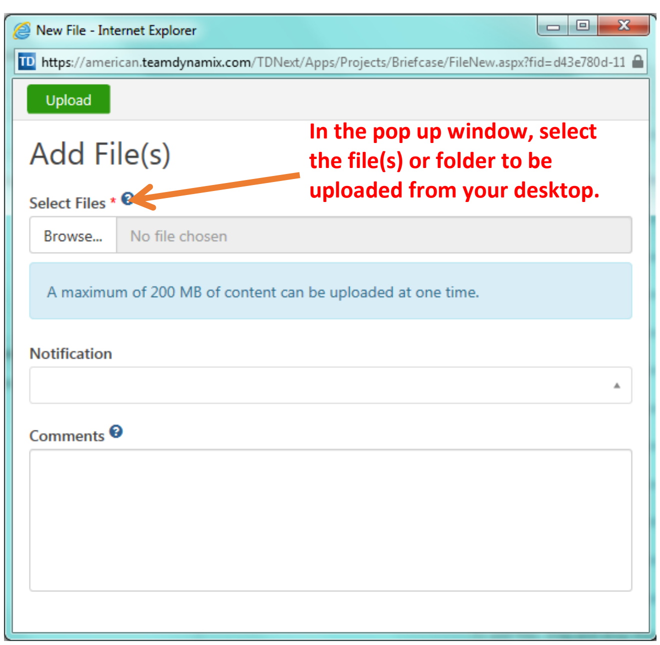
Describe the reasons for undertaking this project.

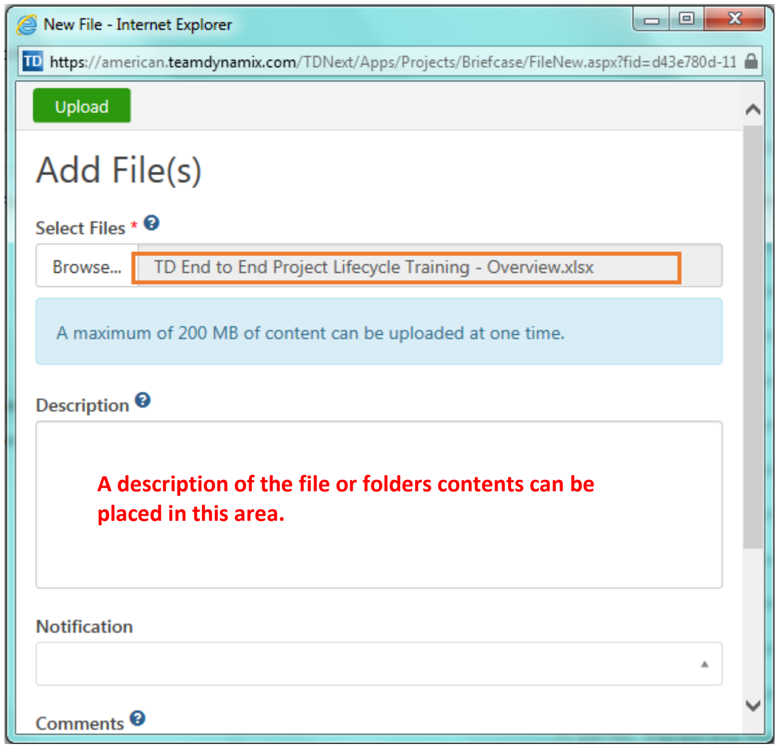
- Is the project linked to the university's overall strategic plan and/or open audit issue?
- How will this request have an impact on students? How will it improve services to students, student retention, etc.?
- How will this request have an impact on staff productivity or innovation?
- How will this 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.

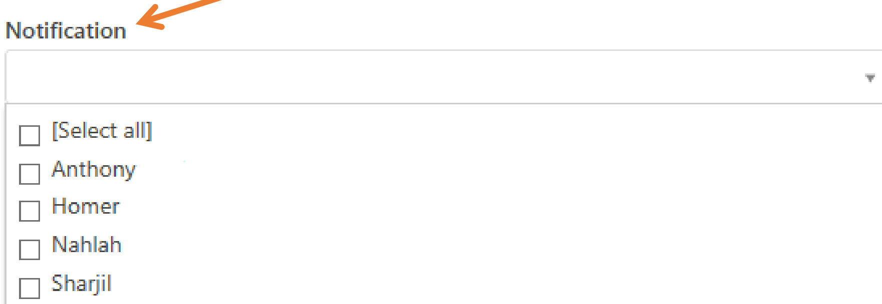
Select the file folder in the Briefcase that the document is to be uploaded to and click "New".



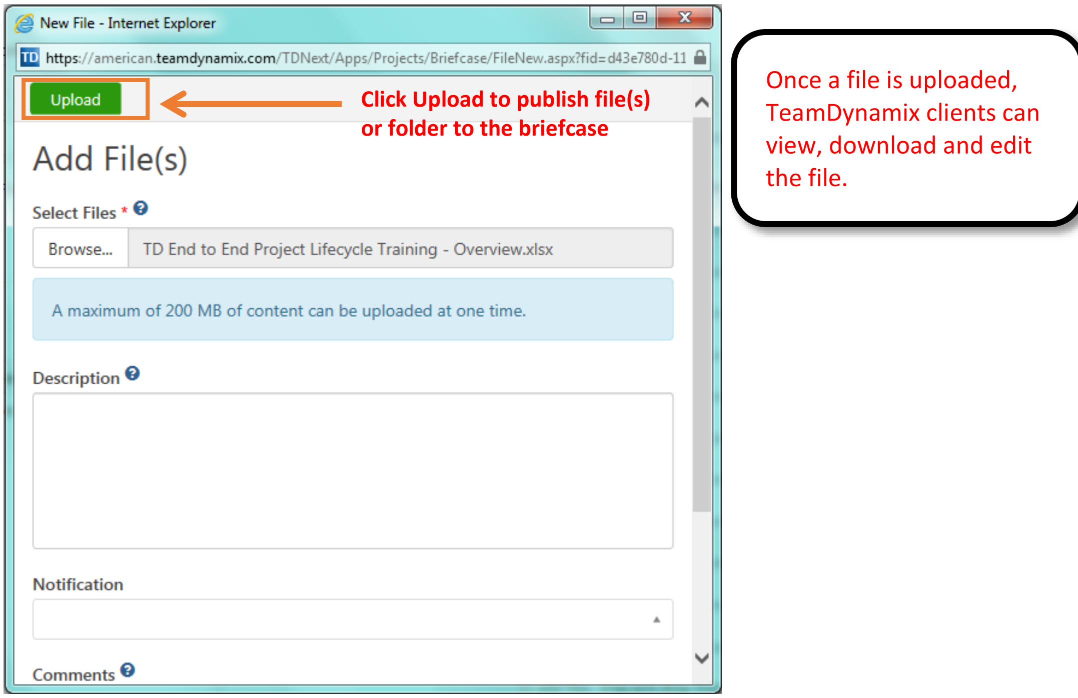




You can choose to notify team members that a document was uploaded.



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

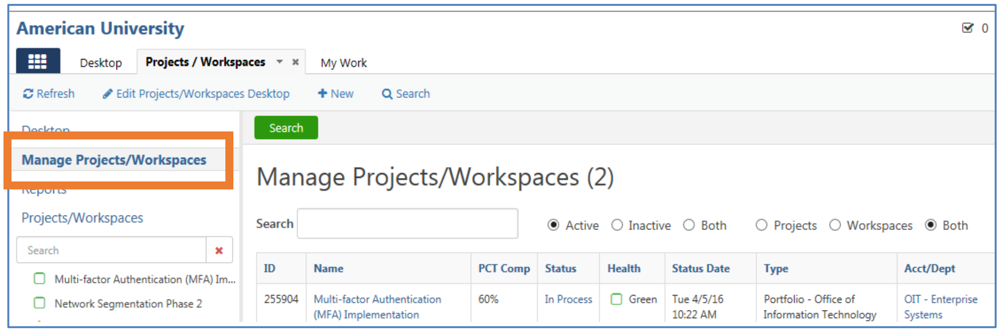
Once you have held your kick-off meeting please be sure to upload your kick-off documentation into the TD Project Briefcase.

ADDING A RESOURCE TO THE PROJECT

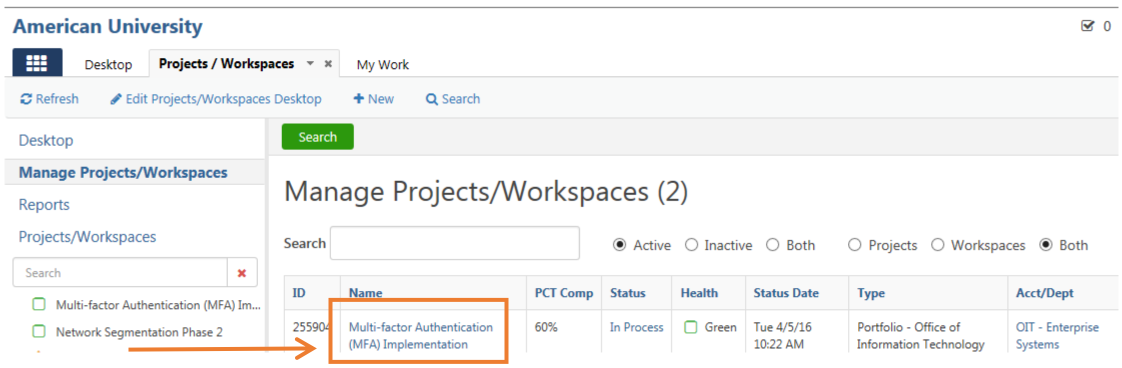
A Project does not have a status in TeamDynamix unless at least one resource has been assigned to it. To add a resource to a project, the resource must be added to the **Resource section** of the **Project Details** window. It is important to note that only resources that are added to the project will 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**

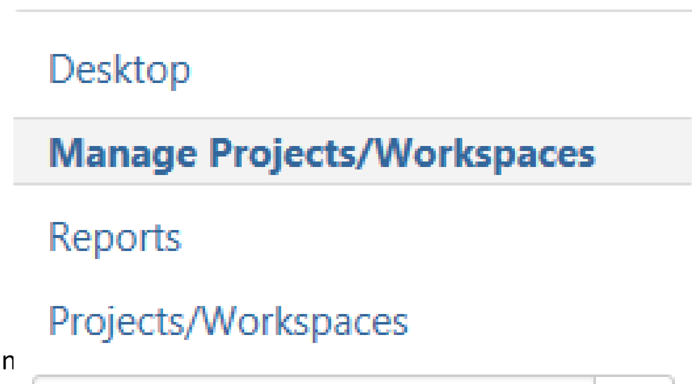
2. Click the **PROJECT NAME**.



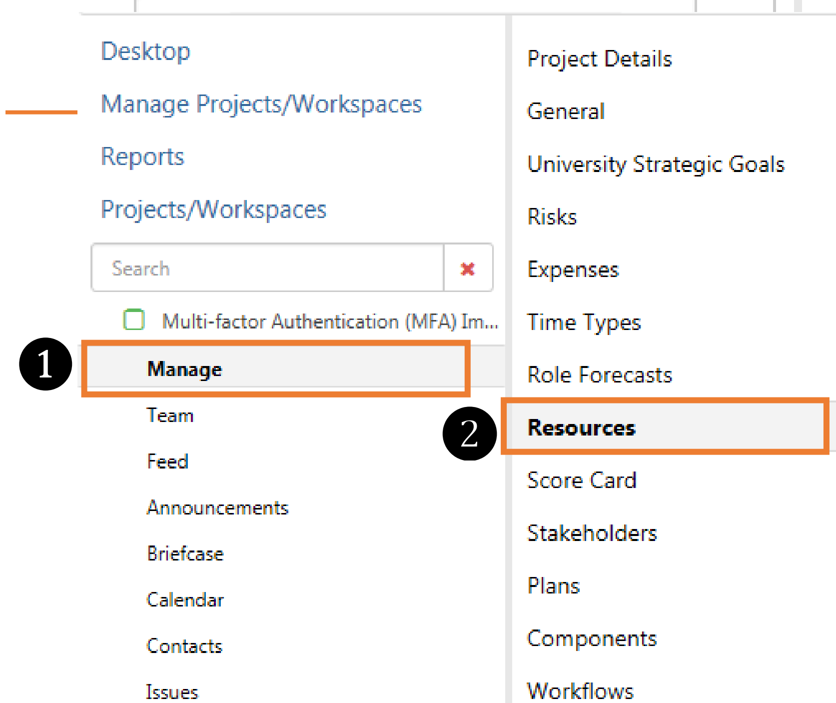
3. Click the project name to open the Project Details window.



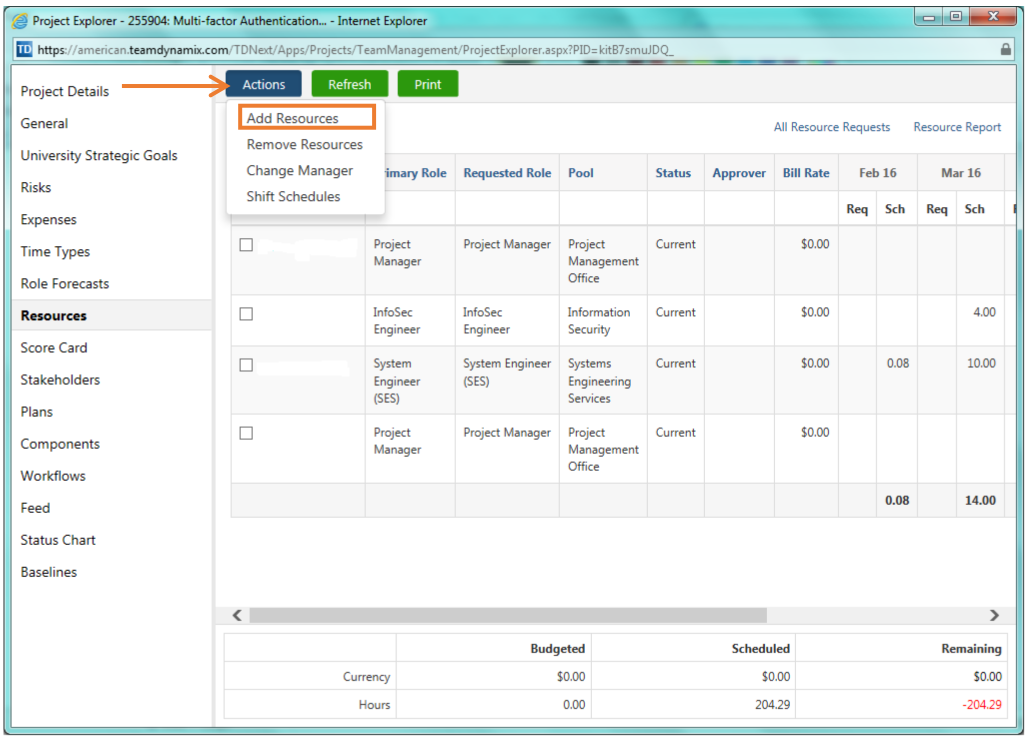
4. Click the arrow next to the project name to view the sub-headings



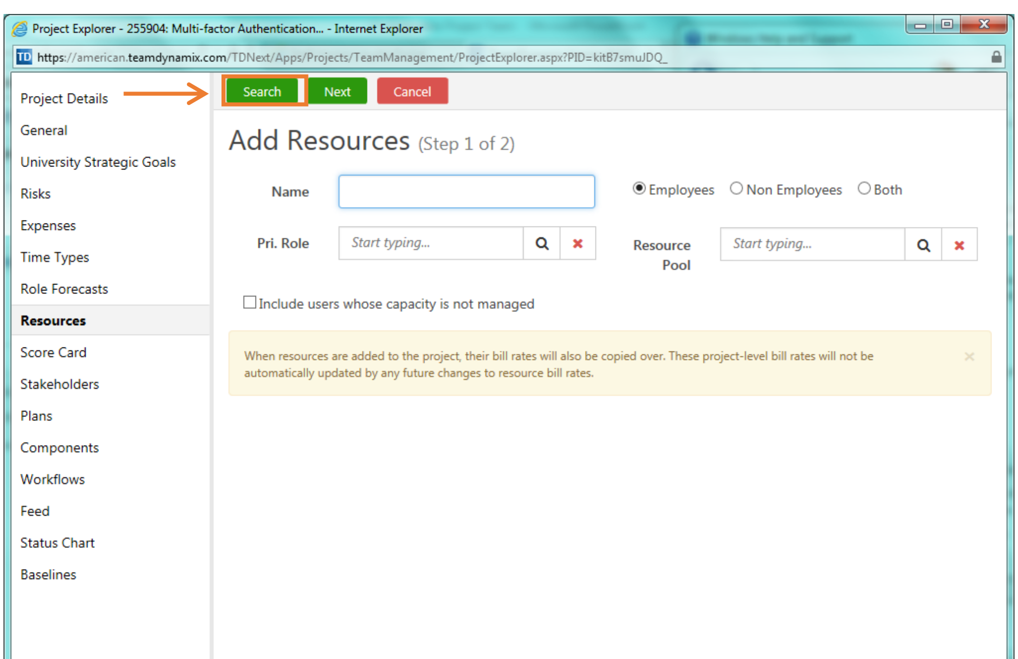
5. In the sub-headin



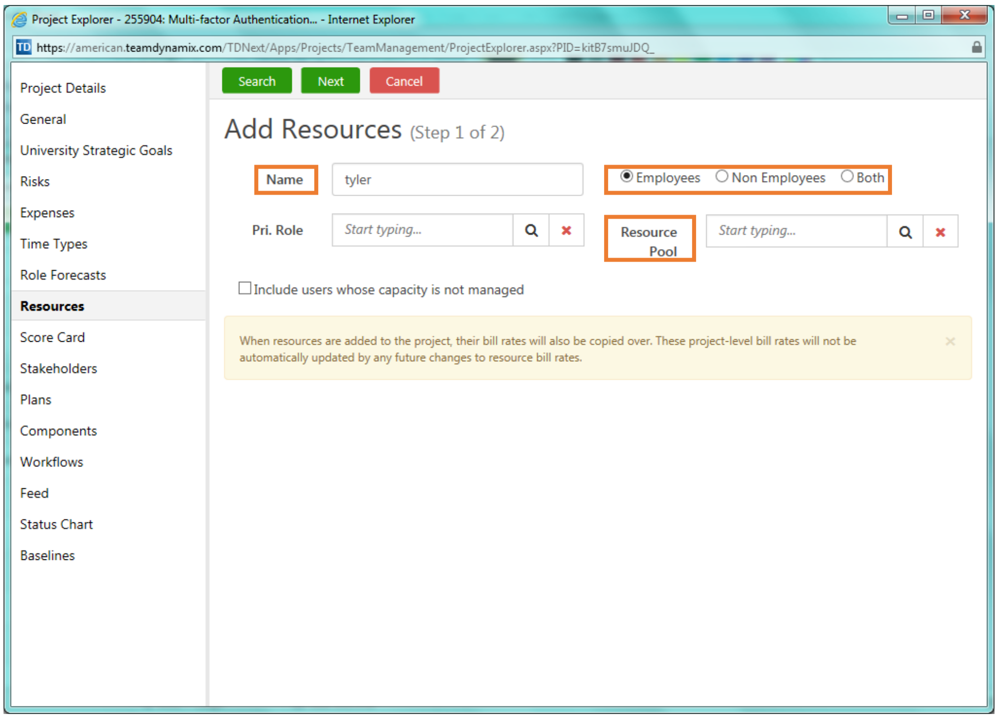
6. Click **Action** then **ADD RESOURCE**.

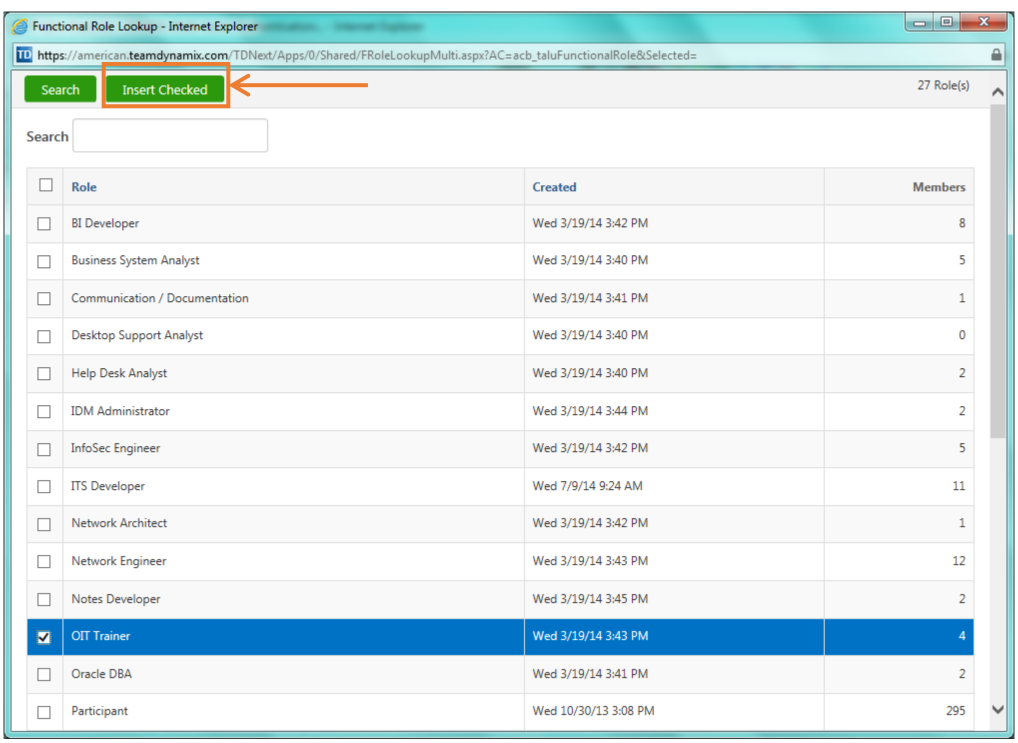


7. Click **SEARCH** to view all available resources or **FILTER** resources by name, primary role, resource pool and employee status.

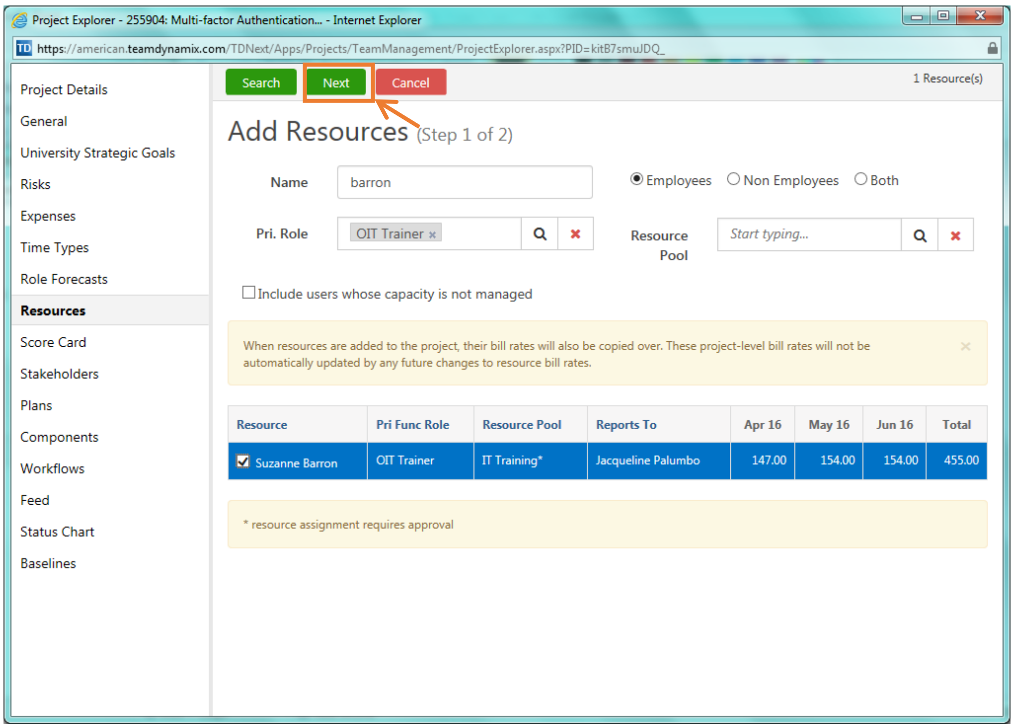


8. You can “Filter” to find a resource by name, primary role, resource pool or employee status.

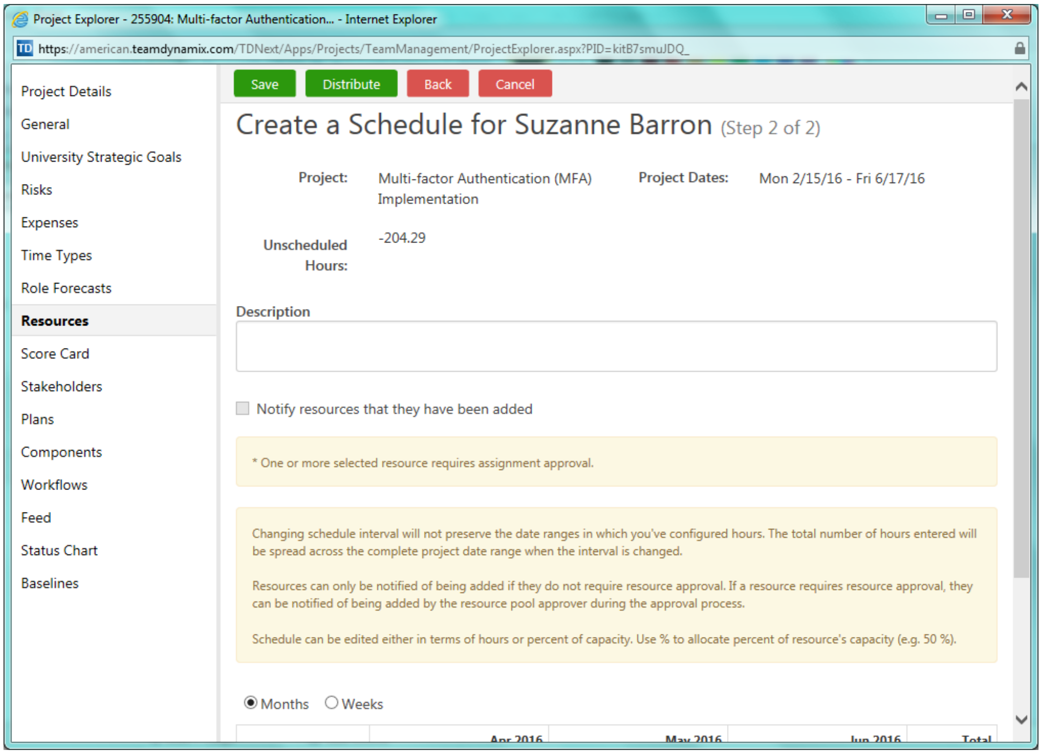


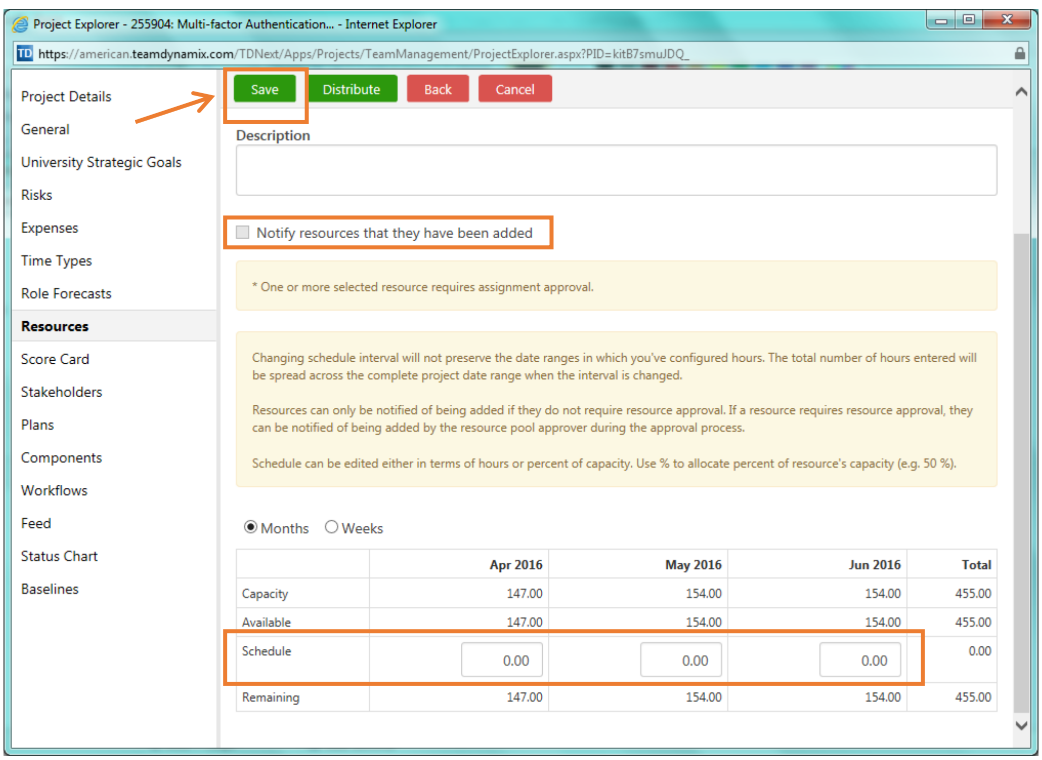


9. Click “**NEXT”** and you will notice that your resource has been populated after the search. You will notice the resource's availability for the time frame of the project.



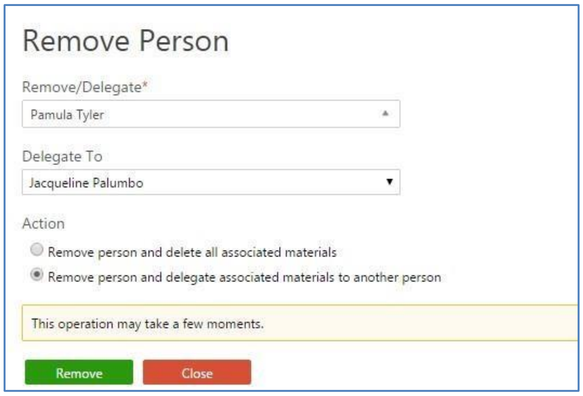
10. Select a resource by clicking the resource's name and then create a schedule for the resource. Check the box to “Notify resource that they have been added” and then click “Save” to add the resource.





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.



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:

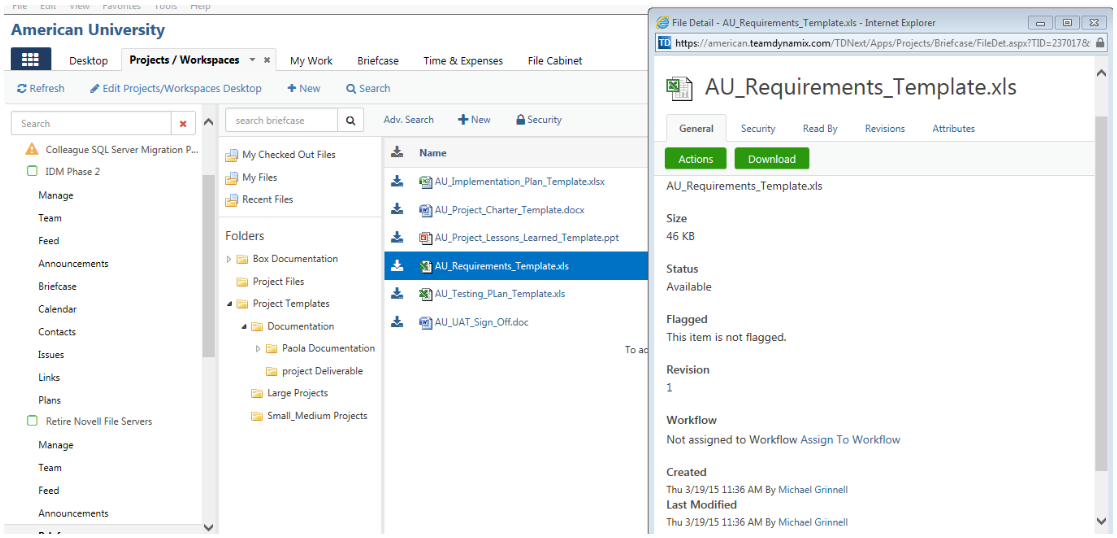
1. Go to https://american.teamdynamix.com
2. Click **SIGN IN**.
3. Click **CLIENT PORTAL**.
4. Log into TeamDynamix using your AU credentials.

ADDING A CONTRACTOR AND/OR VENDOR TO A PROJECT

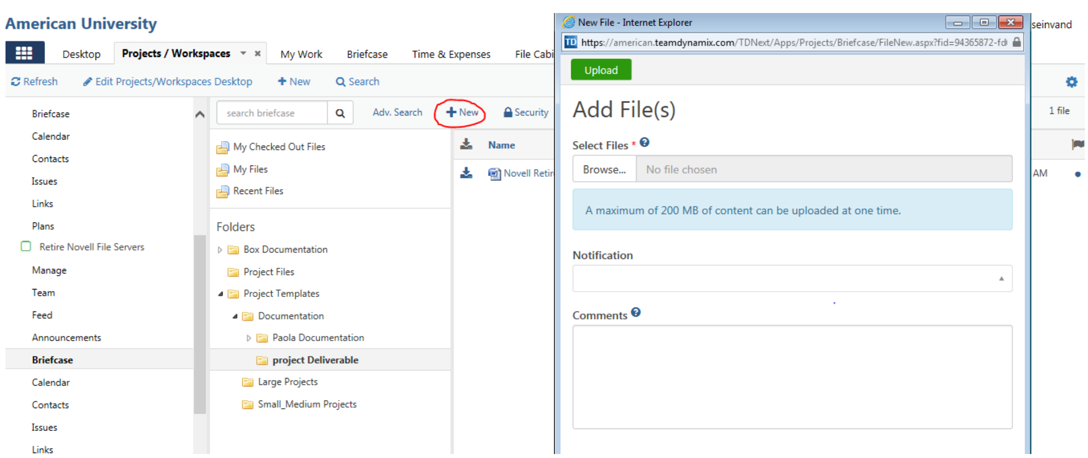
A contractor and/or vendor will need to have a Client account created before they can be added to a project in TeamDynamix. You will need to obtain the person's name, email address, phone number and the project role and submit the request to the OIT Help Desk so that access may be granted to the project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



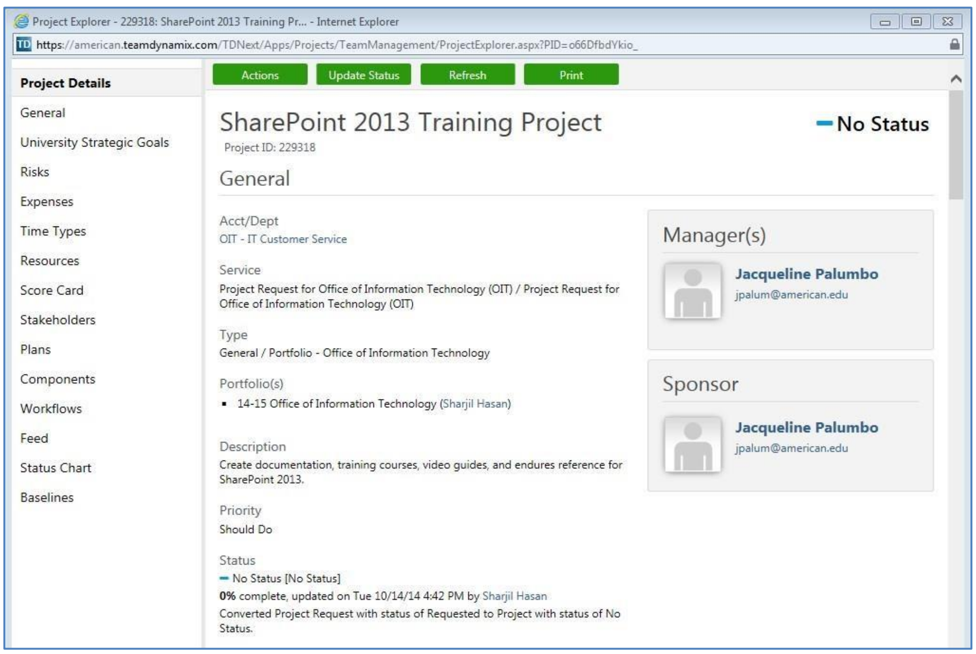
ADDING A PROJECT PLAN, MANAGING TASKS, TIMELINES AND DEPENDENCIES

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

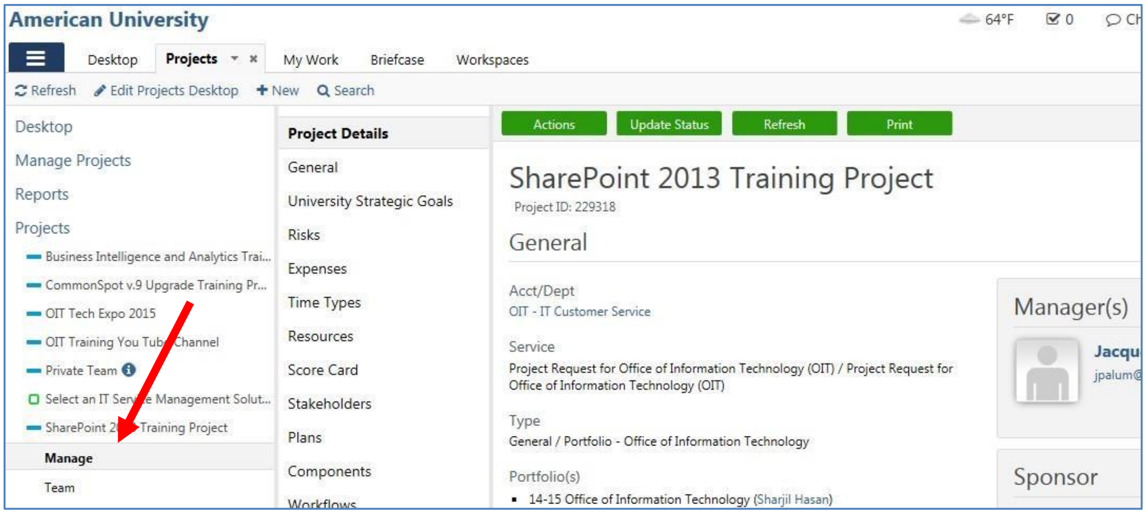
Once a project request has been approved by the Portfolio Owner you will find it under **PROJECTS** on the TeamDynamix **Desktop**. A sample plan will be applied to the Project, unless you deselected this option. You can choose to update the sample plan, delete the plan and start over by creating a new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



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


American University
64°F
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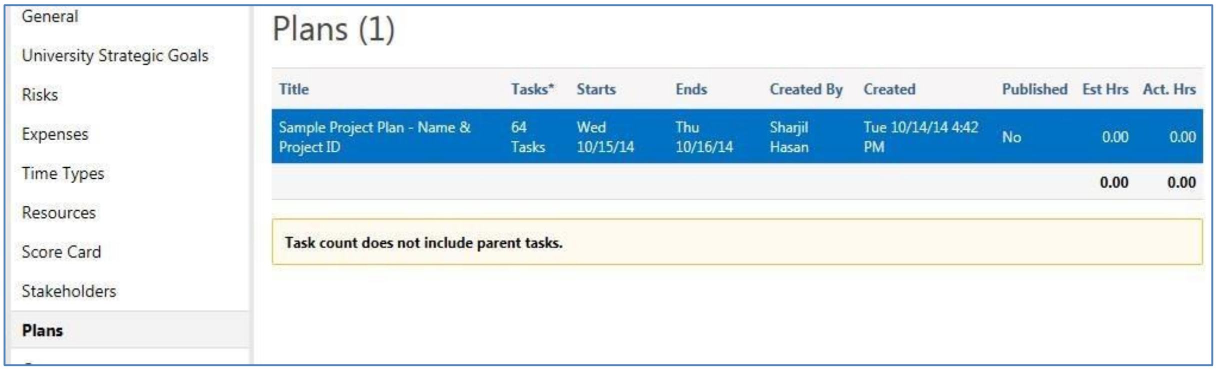
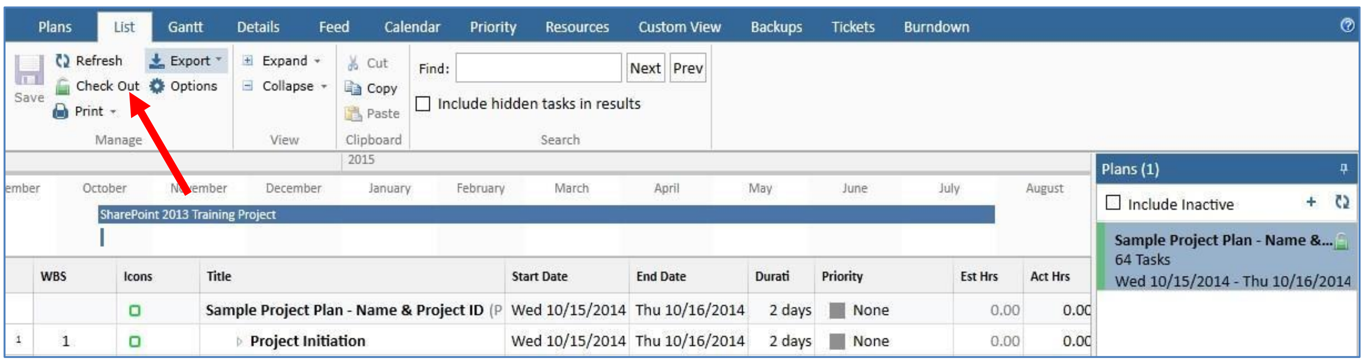
Desktop
Projects
My Work
Briefcase
Workspaces
Refresh
Edit Projects Desktop
New
Search
Desktop
Manage Projects
Reports
Projects
Business Intelligence and Analytics Trai...
CommonSpot v.9 Upgrade Training Pr...
OIT Tech Expo 2015
Private Team
Manage
Team
Project Details
General
University Strategic Goals
Risks
Expenses
Time Types
Resources
Score Card
Stakeholders
Plans
Components
Actions
Update Status
Refresh
Print
SharePoint 2013 Training Project
Project ID: 229318
General
Acct/Dept
OIT - IT Customer Service
Service
Project Request for Office of Information Technology (OIT) / Project Request for Office of Information Technology (OIT)
Type
General / Portfolio - Office of Information Technology
Portfolio(s)
14-15 Office of Information Technology (Sharjil Hasan)
Manager(s)
Sponsor

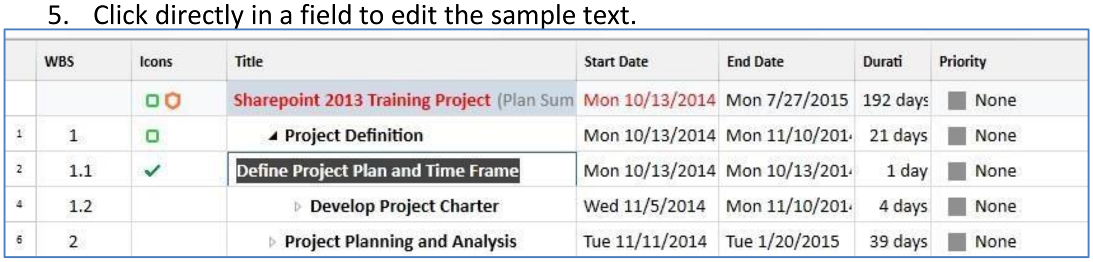
3. Click **PLANS**, then click the **SAMPLE PLAN.**



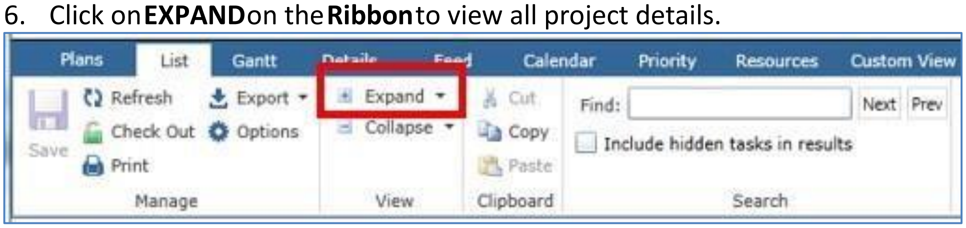
4. Click **CHECK OUT** to edit the plan.



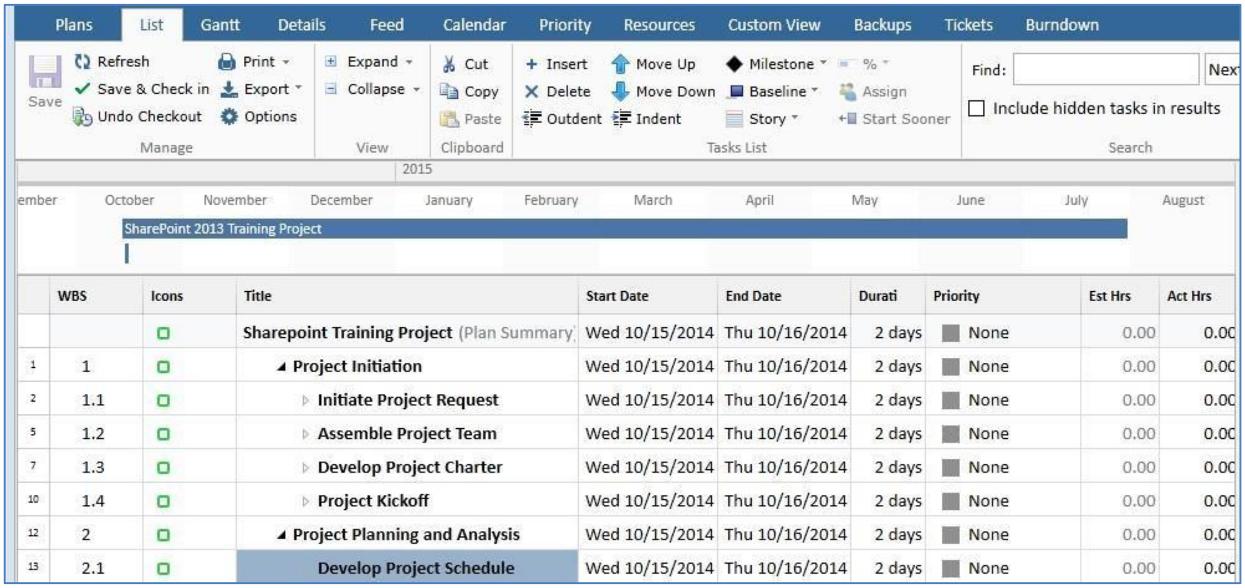
5. Click directly in a field to edit the sample text.



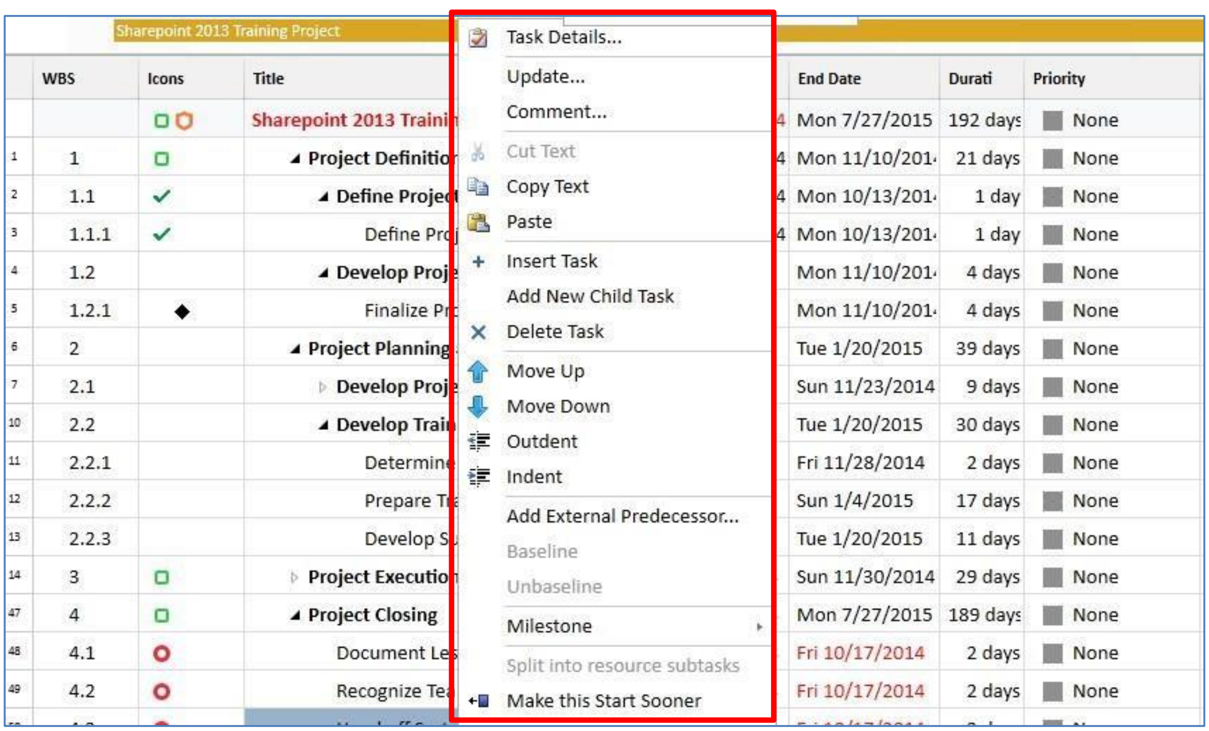
6. Click on **EXPAND** on the **Ribbon** to view all project details.



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

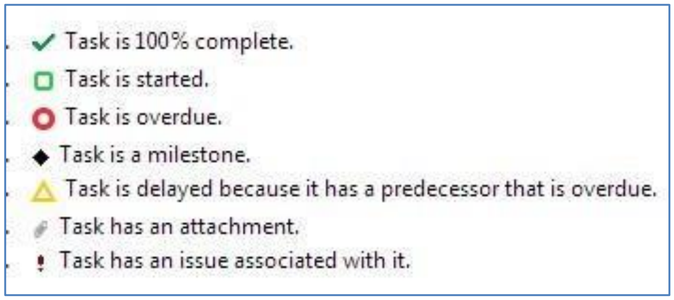


8. Use the **Insert**, **Delete**, and **Move Up** and **Move Down** buttons to customize the project plan, or rightclick for a full menu of options.



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:

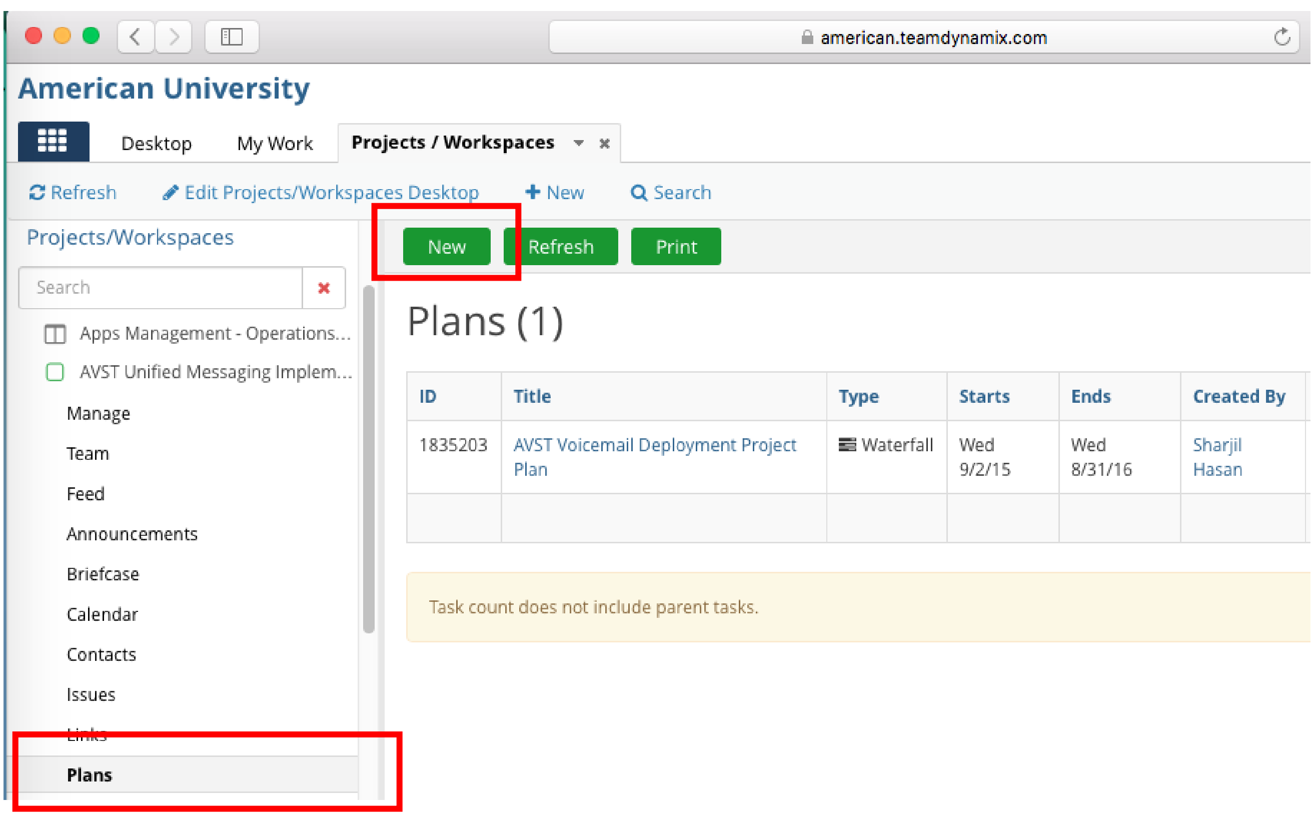


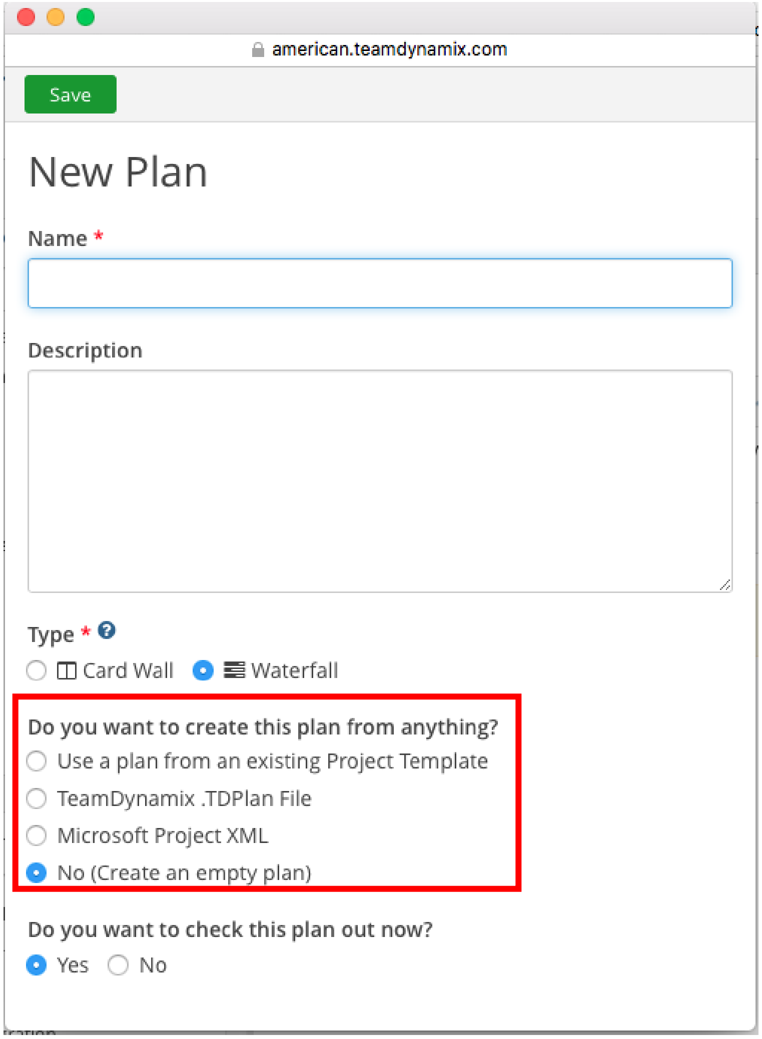
11. You can click the **GANTT** tab on the **Ribbon** to view the plan in Gantt chart format.

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.

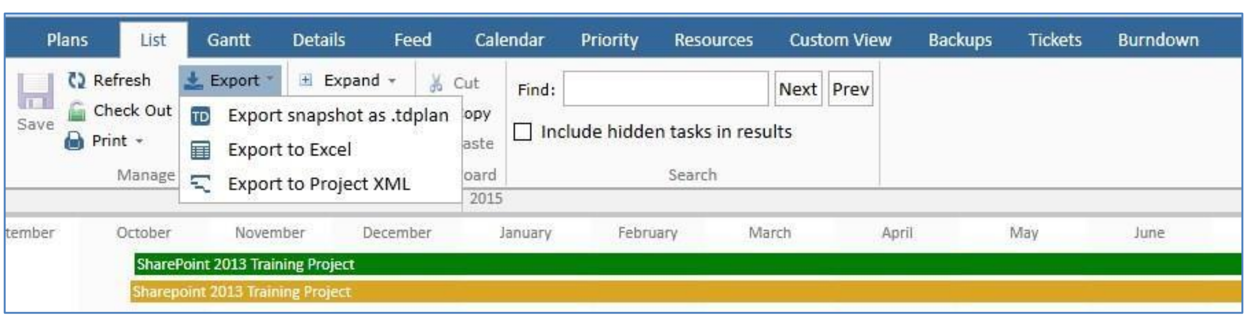
1. For your project, click on **Plans** from the left navigation menu.
2. Click **NEW** in the menu tab.
3. In the New Plan window, under the **"Do you want to create this plan from anything?"** section, select one of the following:
    - Use a plan from an existing Project Template
    - TeamDynamix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





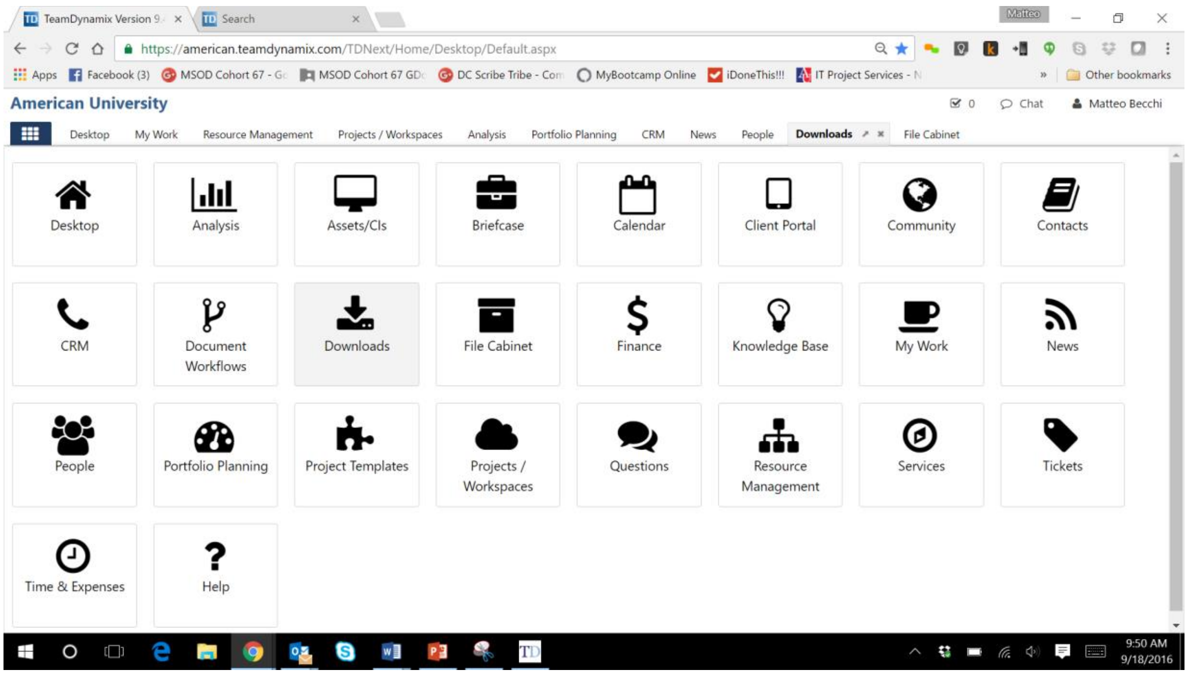
EXPORTING A PROJECT PLAN

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

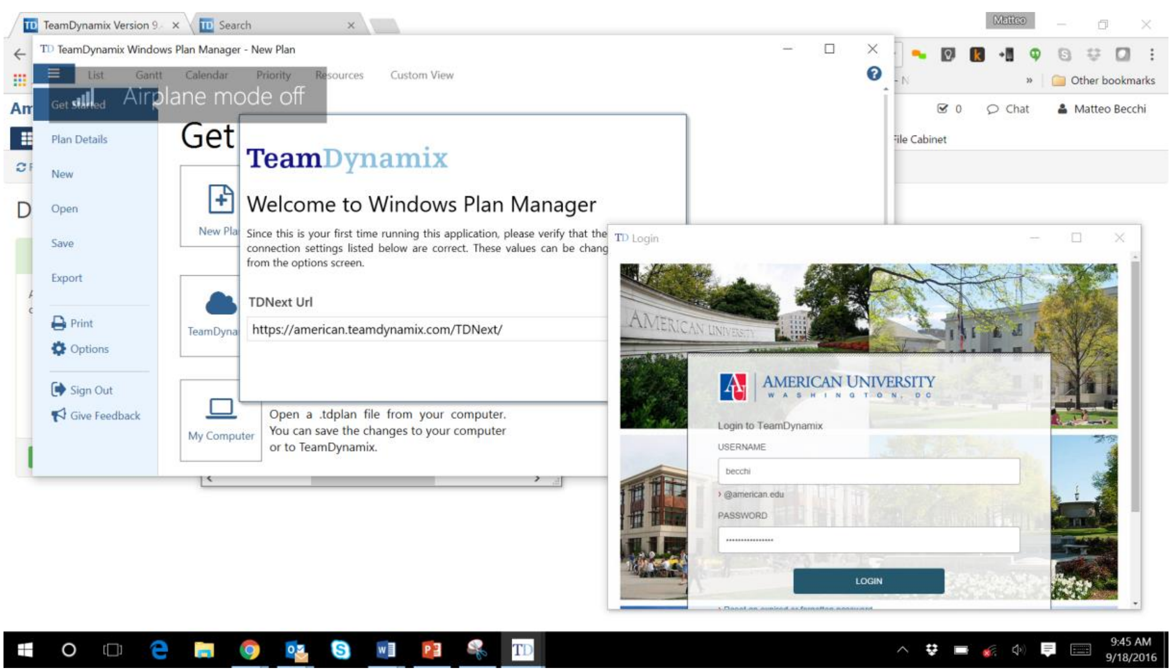


USING WINDOWS PLAN MANAGER (VS. WEB PLAN MANAGER)

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



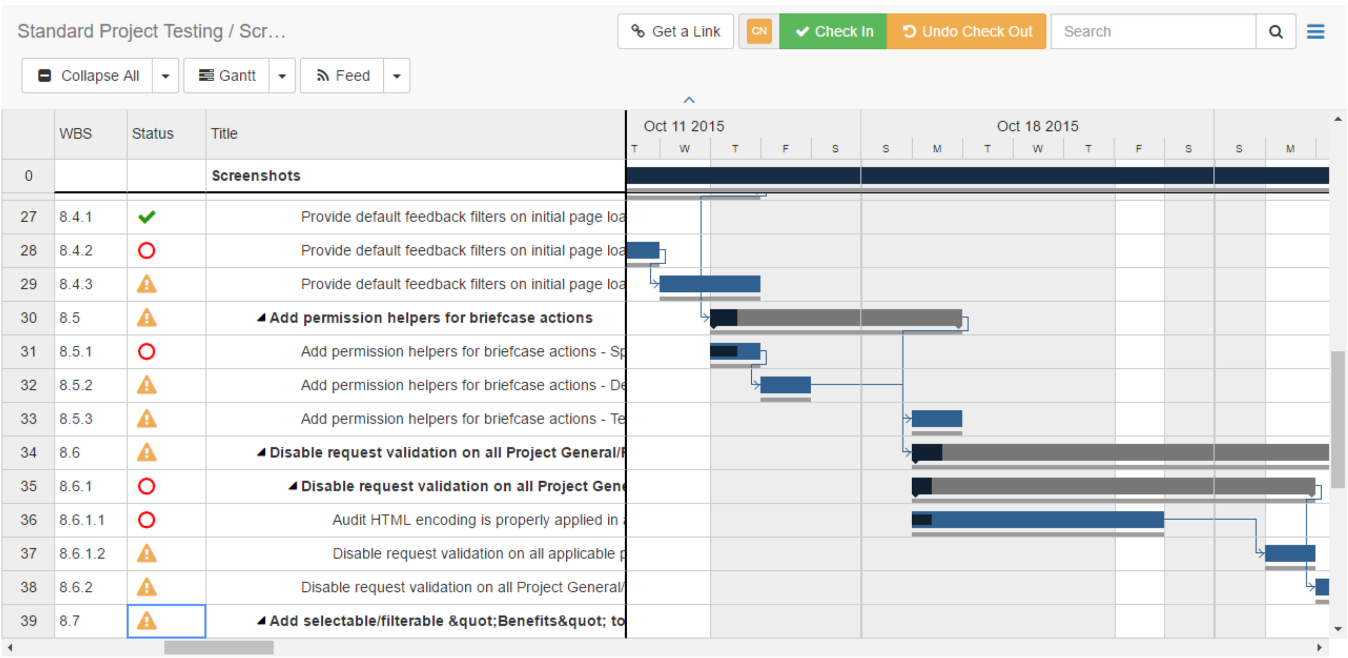
Once installed, be sure to update the TDNext URL with the proper AU path:



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

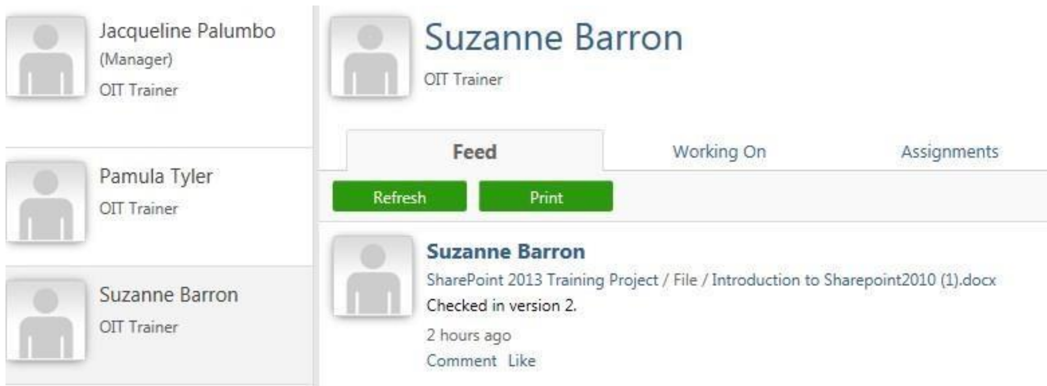
Enhanced Web Plan Manager in TD v. 9.4

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.

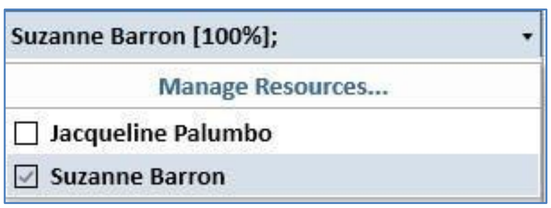


ASSIGNING RESOURCES TO A TASK

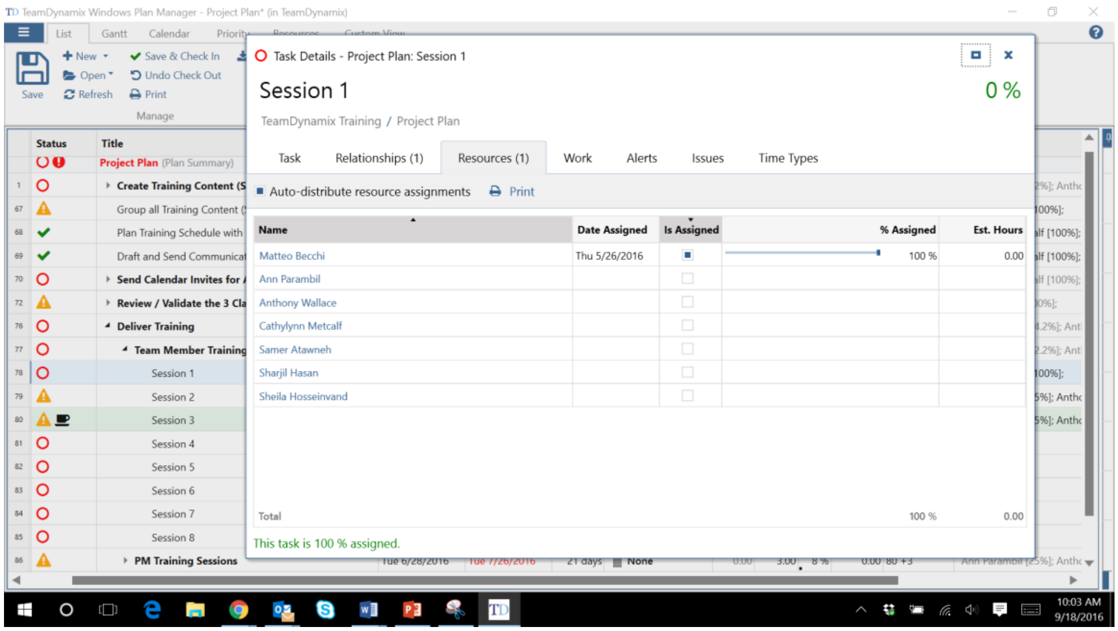
1. Use the **Horizontal Scroll Bar** to scroll to the far right portion of the **Project Plan** screen.
2. Click the **RESOURCES** tab to display all the resources assigned to the project.
3. Drag and drop the **Resource** in the appropriate task. Multiple resources can be assigned to the same task.



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



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



CREATING PROJECT ISSUES AND RISKS

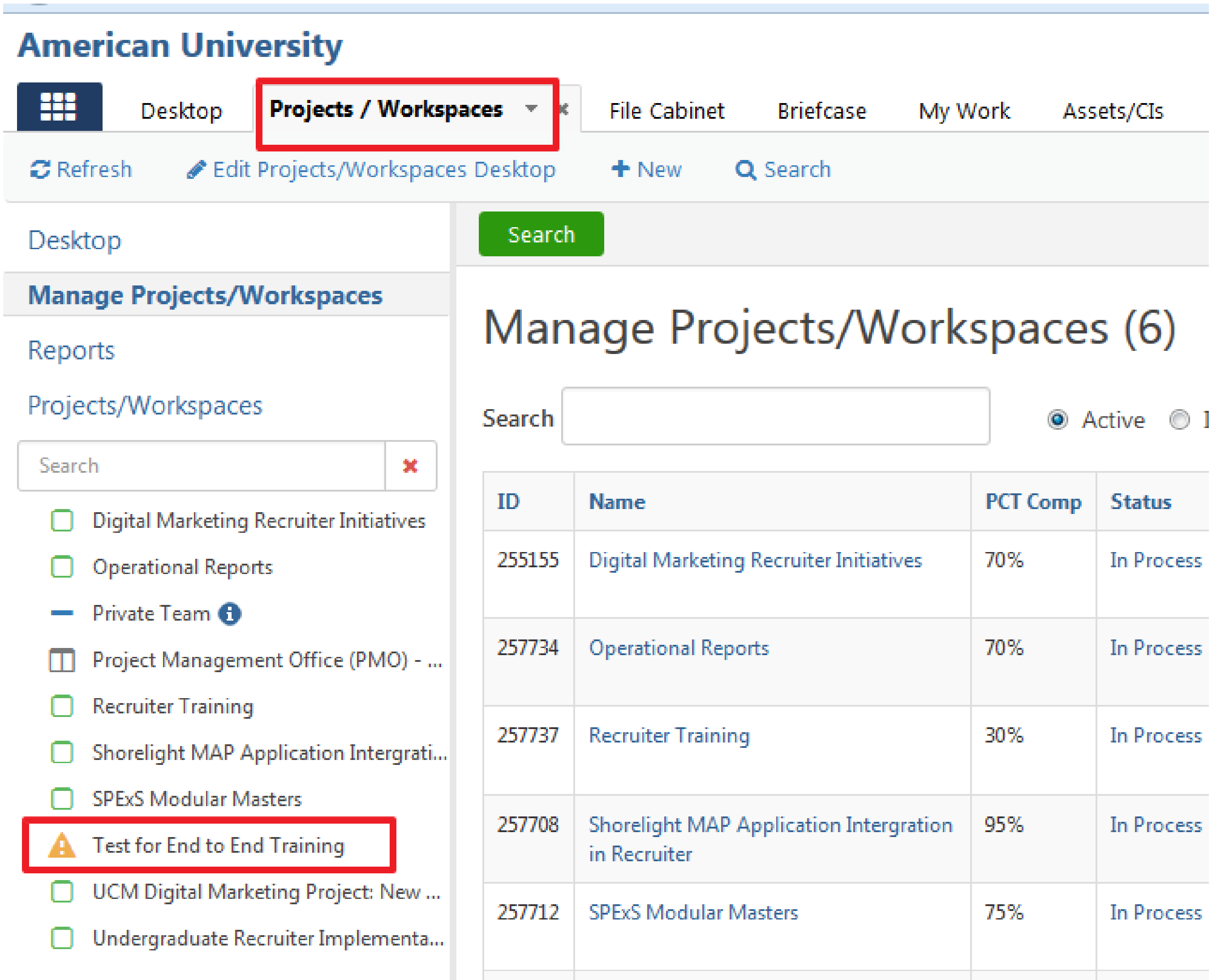
Identifying issues and risk is your way to ensure quality in the project. All project team members are encouraged to use this tool to communicate issues and risks with the team. Note that you can add an existing category, or add one into TeamDynamix for use on this project only.

Definitions:

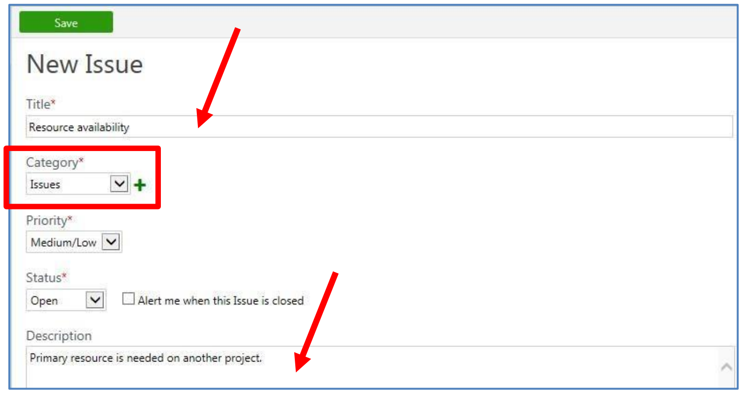
A ***risk*** is a potential problem that needs a mitigation strategy to avoid impacting a project's success. *A* **risk** *is an uncertainty with some degree of likeliness to happen.*

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.*

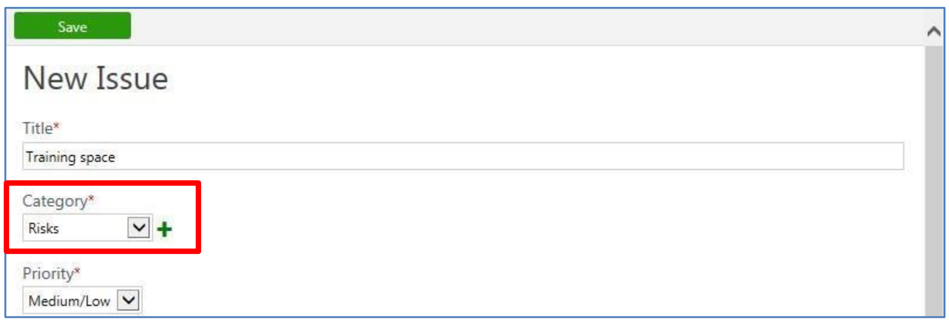
1. To create a new issue click on **ISSUES** on the **Project** navigation pane.
2. Click on **PROJECTS/WORKSPACES**, then select your project from the left hand side.



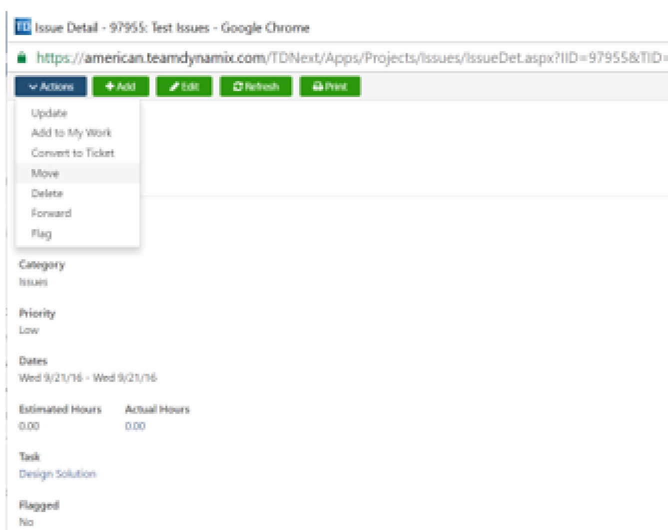
3. Choose Issues
4. Click **NEW**.
5. Enter a brief description in the **Title** field, and detailed description in the **Description** field.
6. Select **ISSUE** for the **Category**. Note: you can add an existing category, or add one into TeamDynamix for use on this project only.

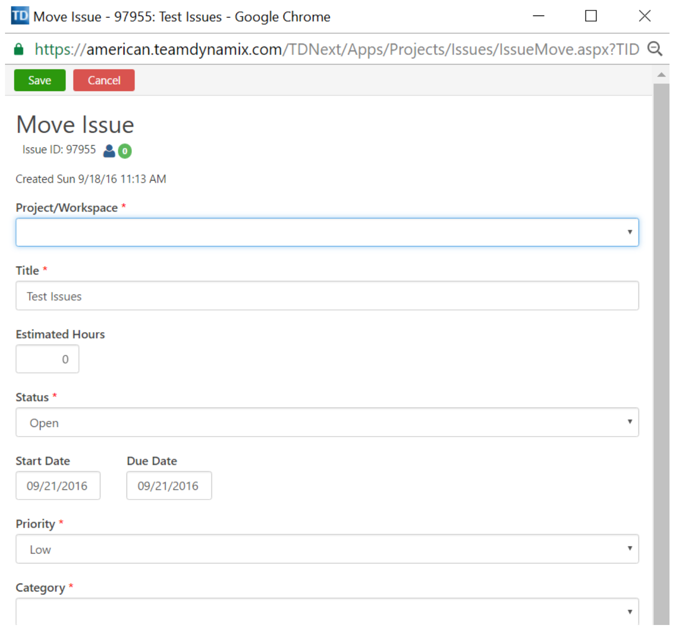


7. Complete all the required fields denoted with a red asterisk.
8. Click the **SAVE** button; you'll receive a confirmation.
9. To create a new **Risk**, follow the steps above, but select **RISK** for the Category.



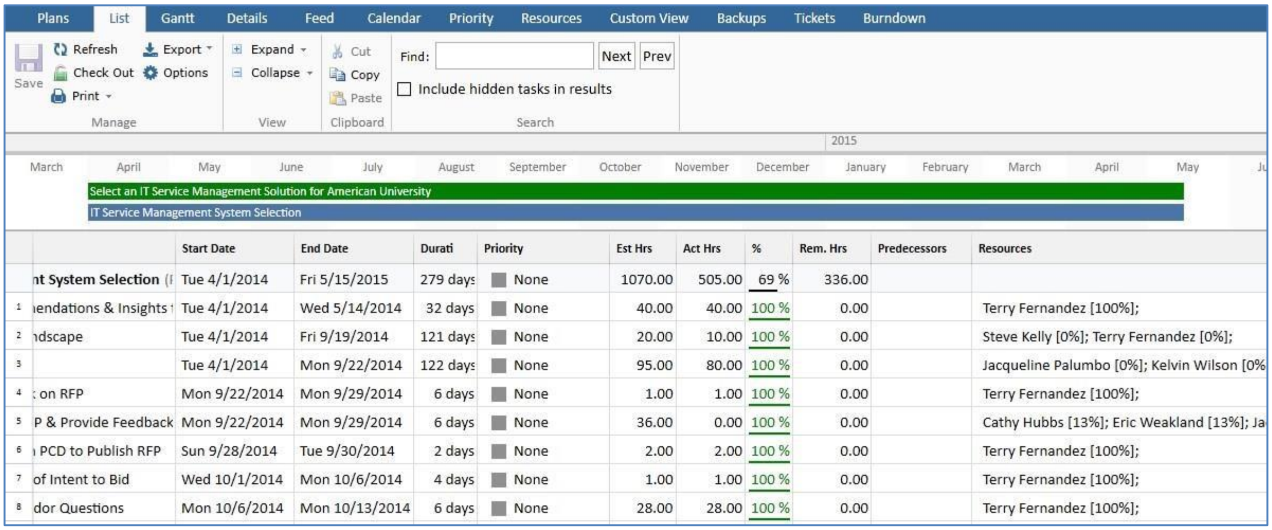
10. You can also move an existing issue from your current project to another project




Move Issue - 97955: Test Issues - Google Chrome
https://american.teamdynamix.com/TDNext/Apps/Projects/Issues/IssueMove.aspx?TID
Save
Cancel
Move Issue
Issue ID: 97955
Created Sun 9/18/16 11:13 AM
Project/Workspace *
Title *
Test Issues
Estimated Hours
0
Status *
Open
Start Date
09/21/2016
Due Date
09/21/2016
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.



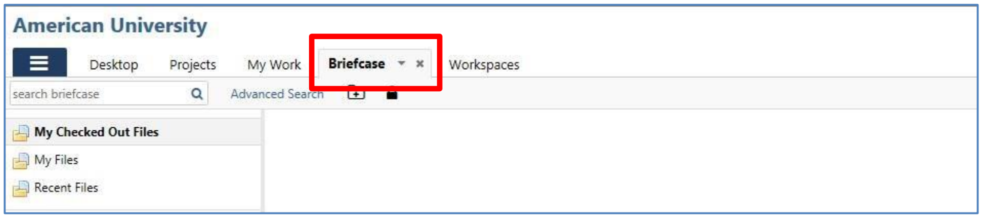
CREATING PROJECT ANNOUNCEMENTS

Use the **Project Announcement** feature to communicate with Team Members.

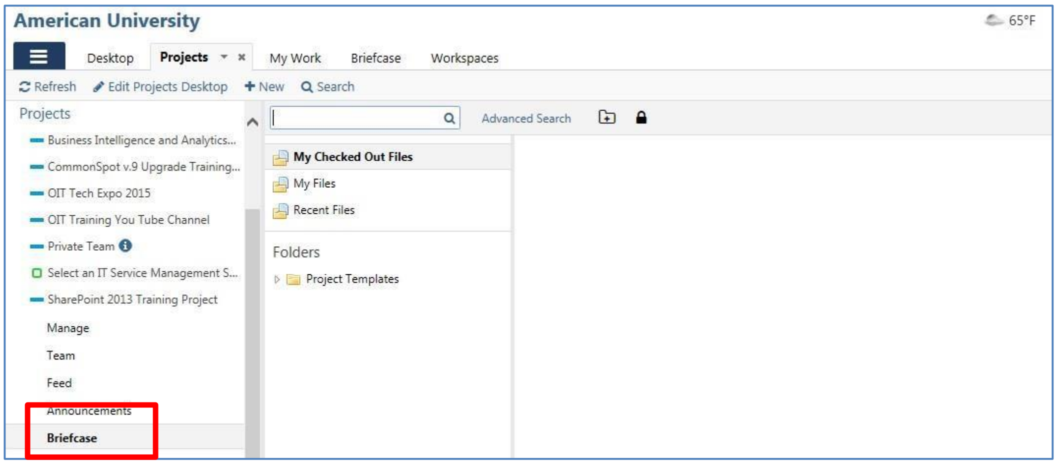
1. Click **ANNOUNCEMENTS,** then **NEW ANNOUNCEMENT** in the navigation pane of the **Project Desktop**.
2. Click the **Project Name** in the navigation pane of the **Project Desktop**.
3. Type a **Title** for the announcement, then select the project(s). You can choose an expiration date for the announcement.
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

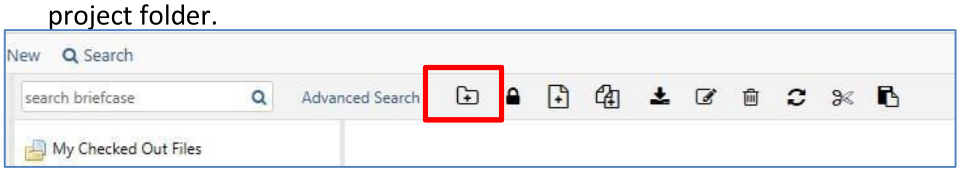
The **Project Briefcase** is the central repository for project documents. You can access all documents in the TeamDynamix Briefcase by clicking on the **BRIEFCASE** tab. The **Briefcase** allows you upload and save multiple revisions of a document. You can also notify team members that a document has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

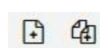


You can access the **Briefcase** for a specific project by clicking on the **Briefcase link** under the **Project** name.

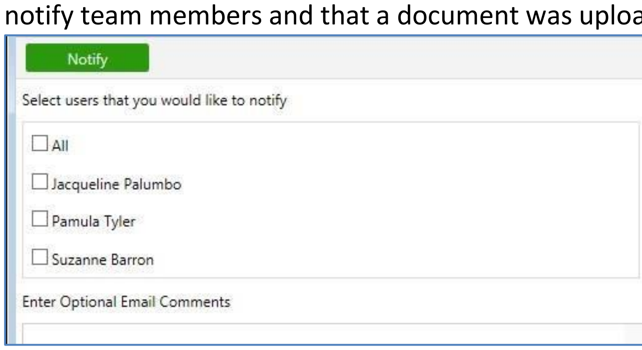


1. Click on the **ADD NEW** button,  , to upload and name a <u>new</u> folder, or, you can open an existing project folder.



2. Click the **SINGLE** or **MULTIPLE** upload buttons,  . You can also drag and drop the files to move them.

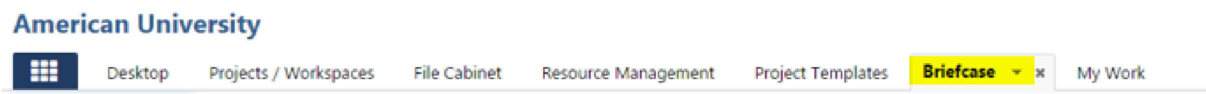
3. You can choose to notify team members and that a document was uploaded.



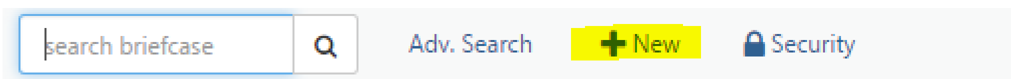
4. Team members will not be able to publish a file after it is uploaded. Once a file is uploaded, TeamDynamix clients can view the file.

UPLOADING A DOCUMENT

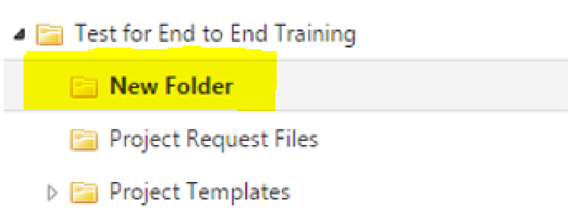
1. Open Briefcase Tab: The Briefcase allows users to store project documents in Team Dynamix.



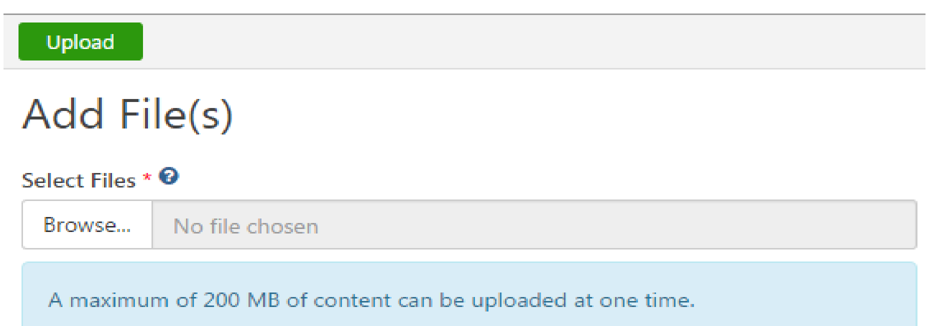
2. Select add new.



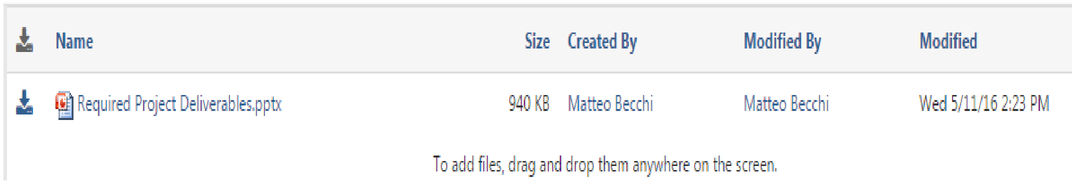
3. Select the project name from the left navigation pane. Create a folder to store all uploaded documents.



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



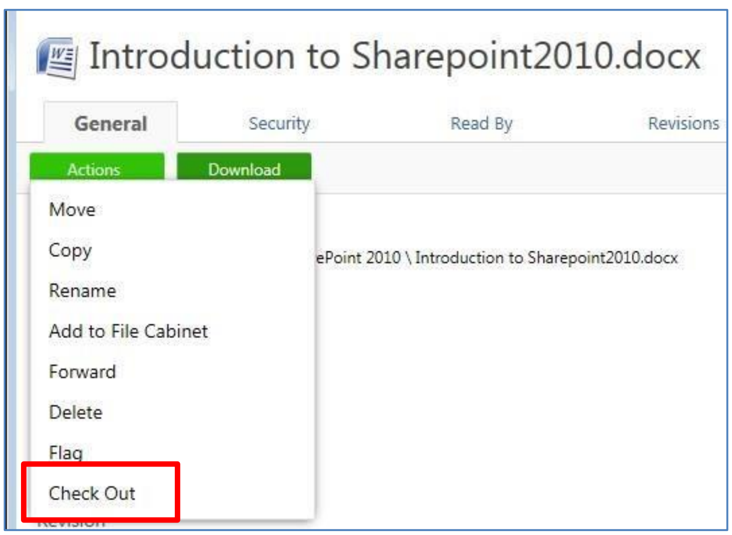
5. The document uploaded will be stored in the designated folder for other team members to access the contents.



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**.



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

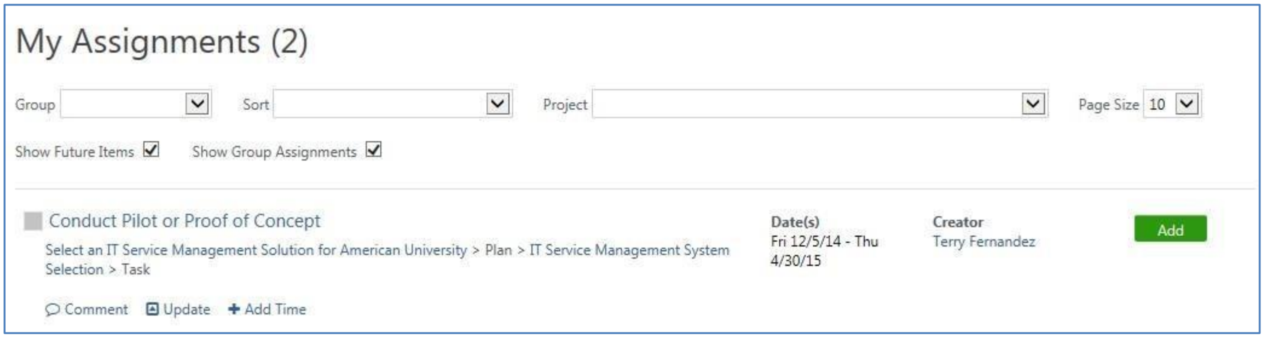
SharePoint and TeamDynamix may be used in tandem on projects. All OIT Projects should be tracked in TeamDynamix, with documents stored in the Project Briefcase. This allows documents to be checked in and out, and version control to be utilized. If the project includes external team members who do not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

TRACKING AND UPDATING WORK AND TIME

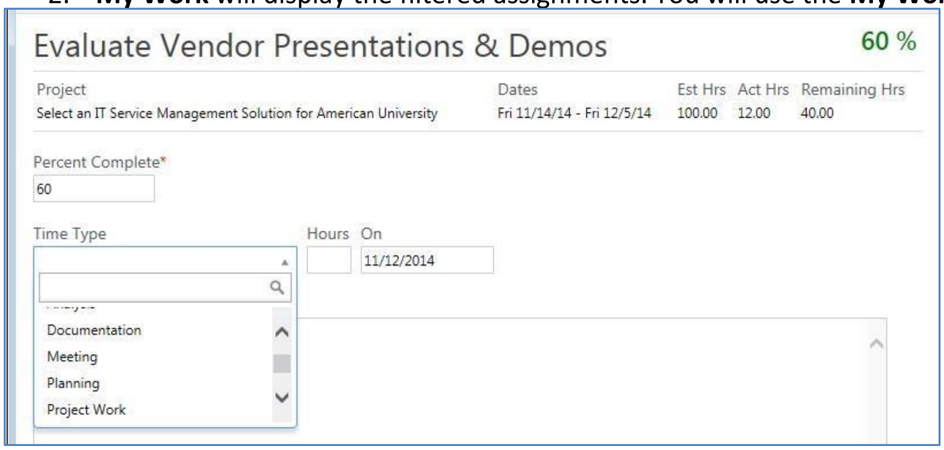
MY WORK

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**.



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

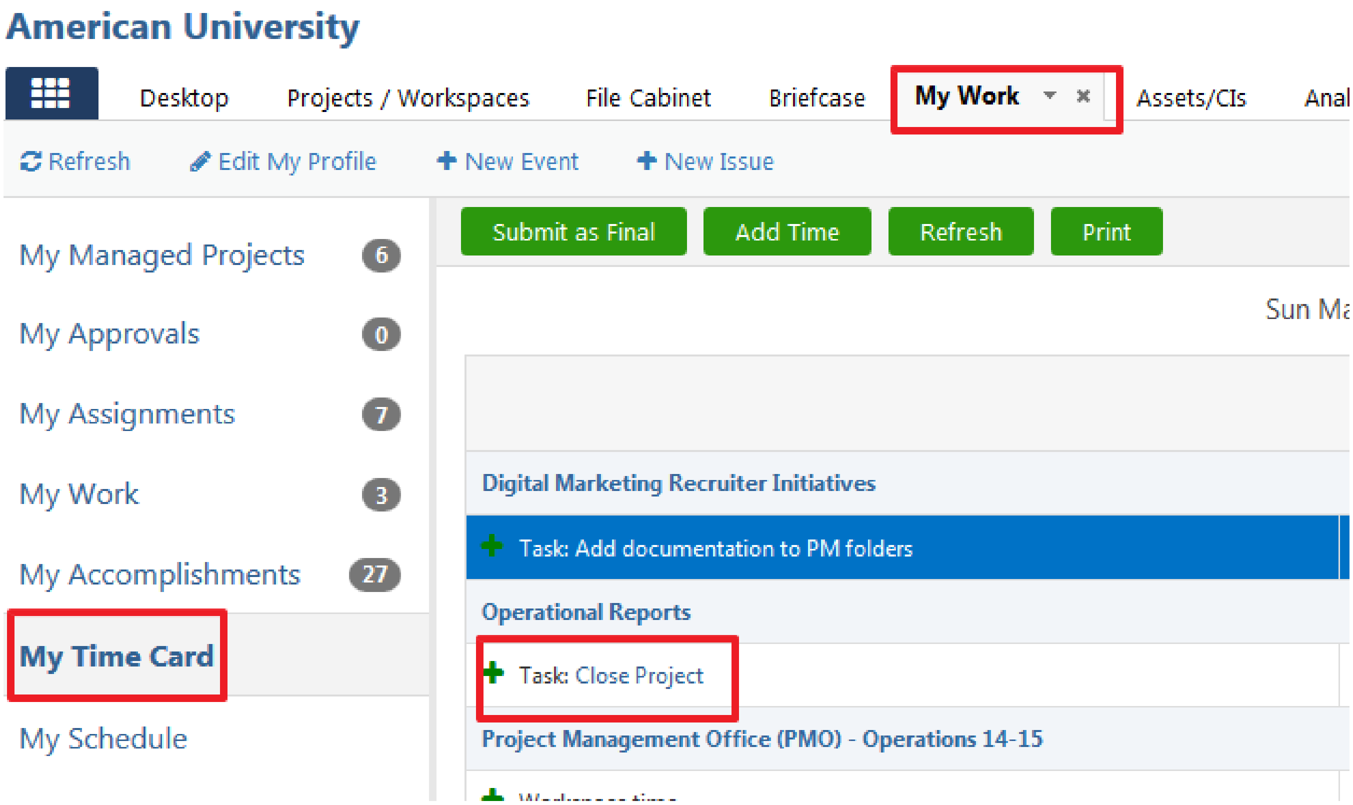


REPORTING TIME IN THE WORKSPACE

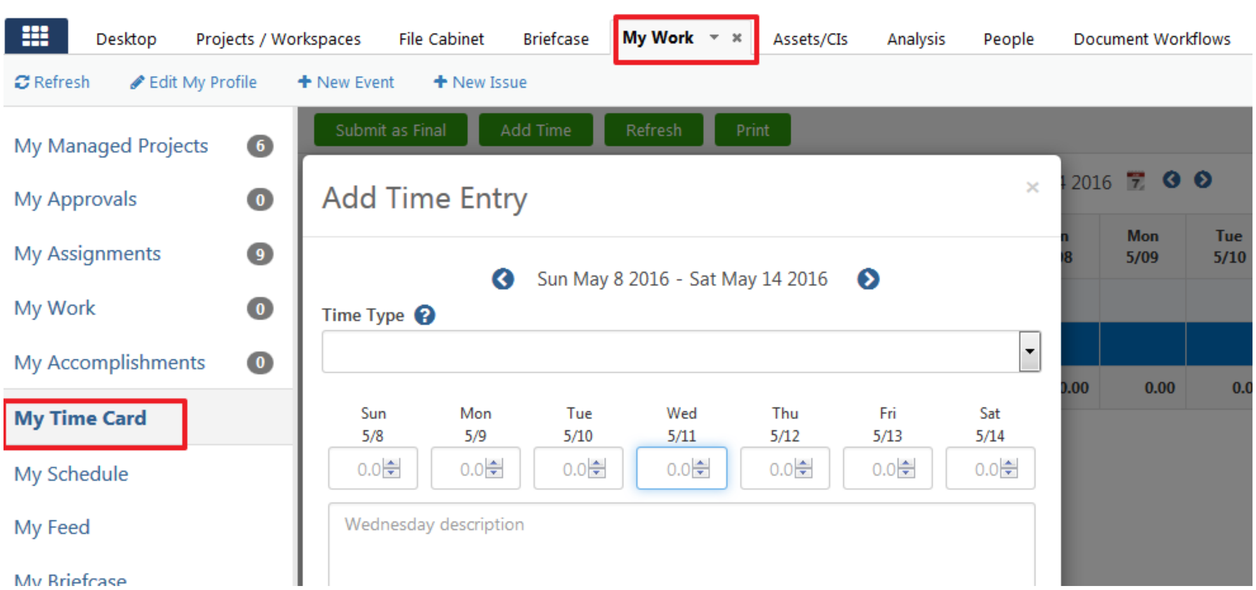
MY TIME CARD

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**.

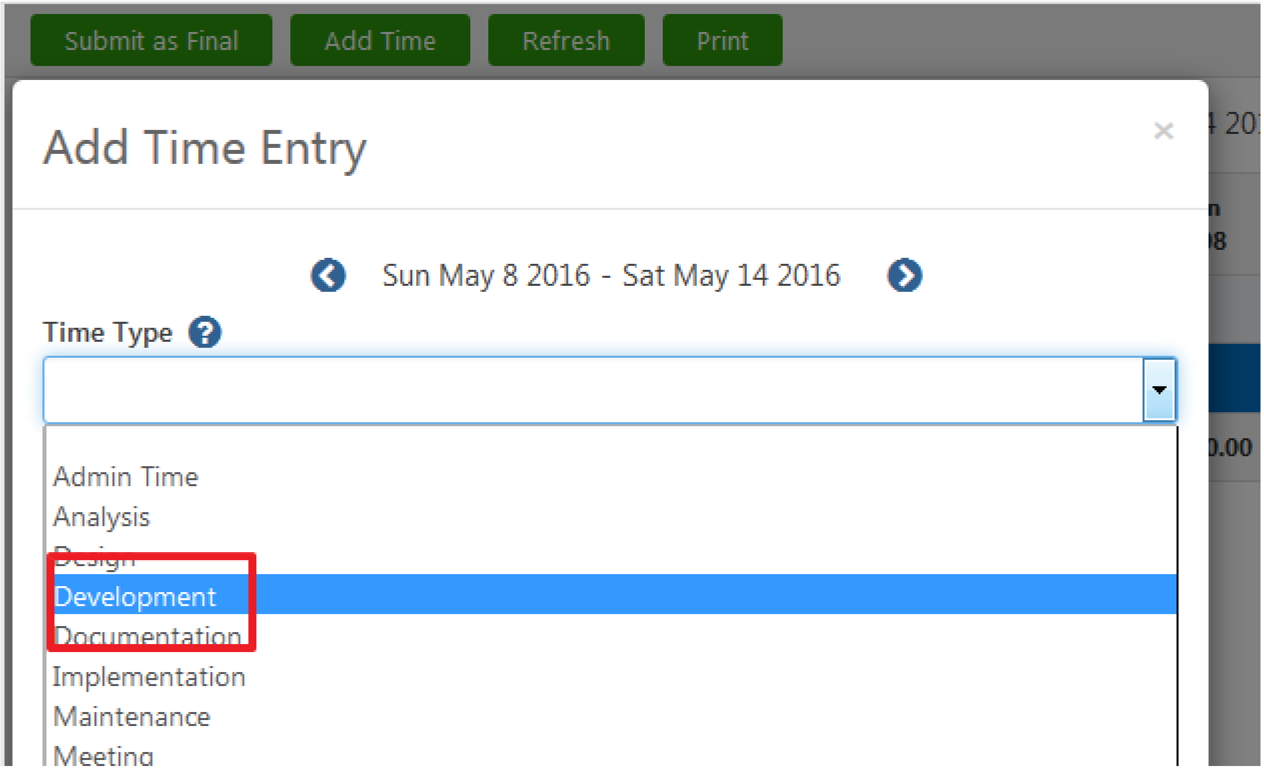
1. Go to the **MY WORK** application.
2. Click on **MY TIME CARD** in the left navigation menu.
3. Then click on the **+ SIGN** under your task



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.



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

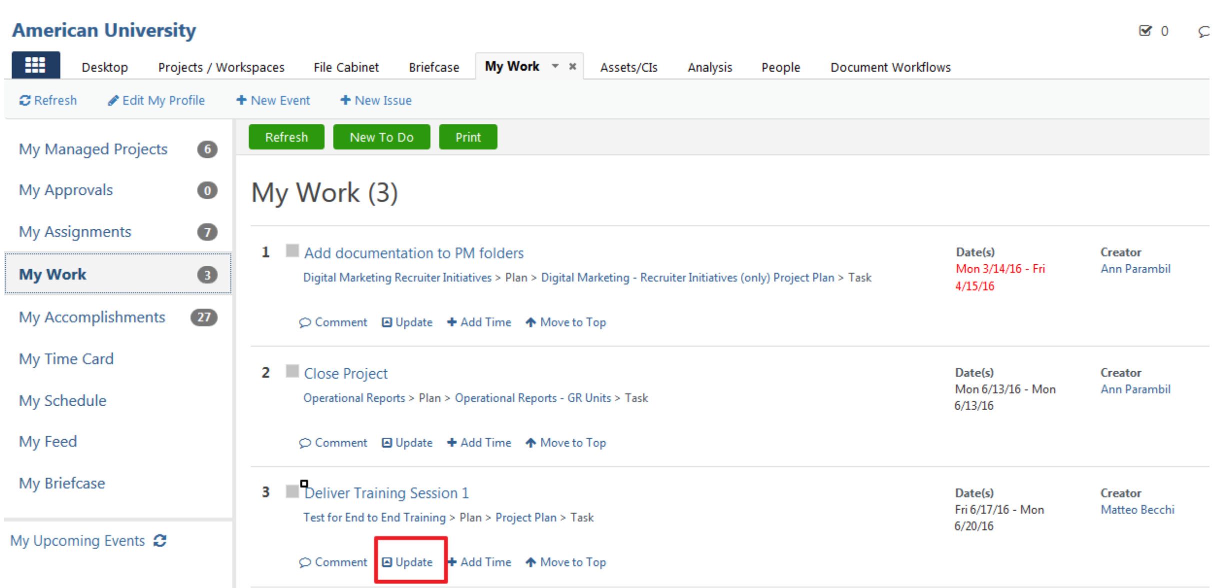


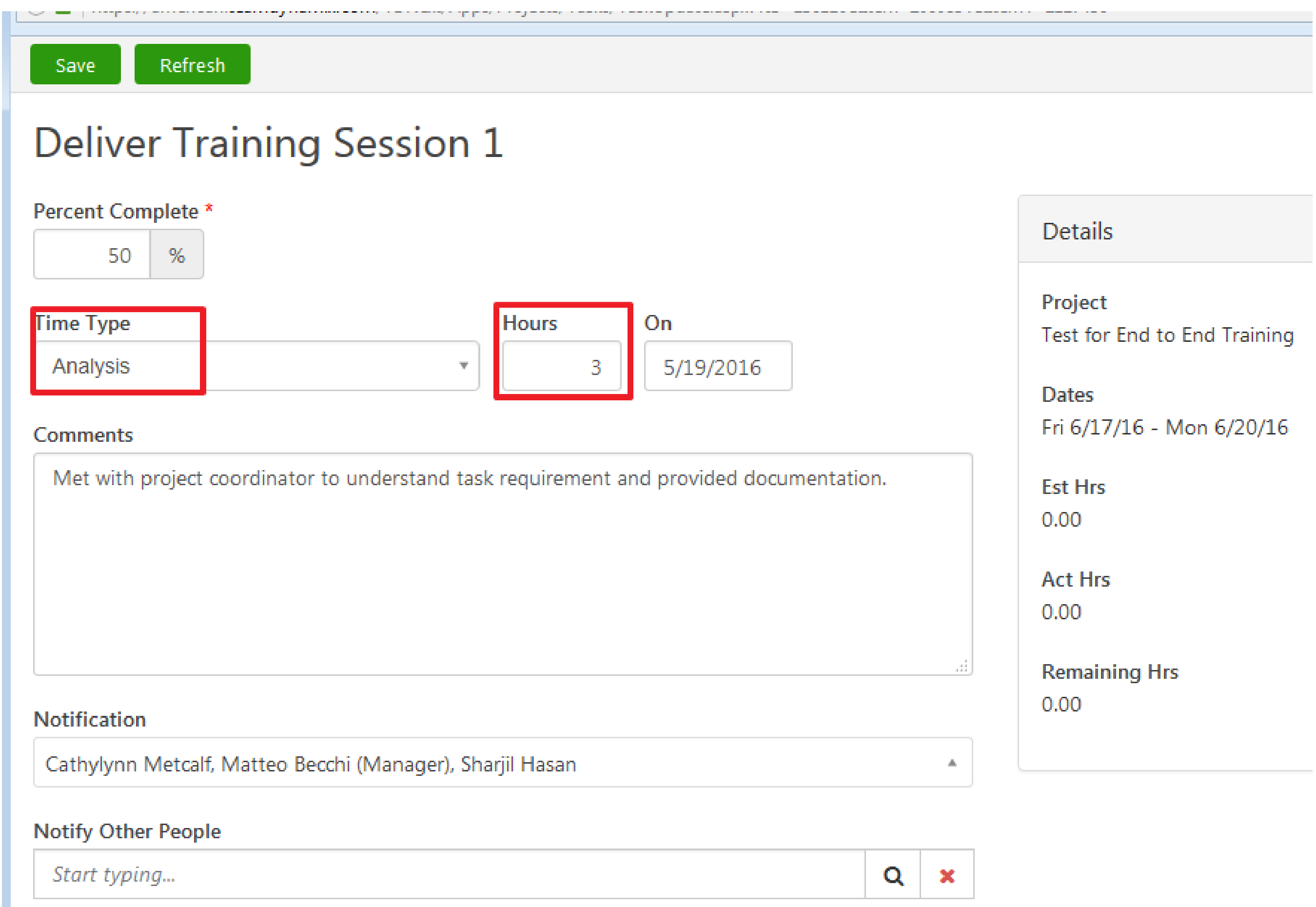
6. Click **Save**.

<u>Updating Time worked on Project Tasks</u>

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





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.

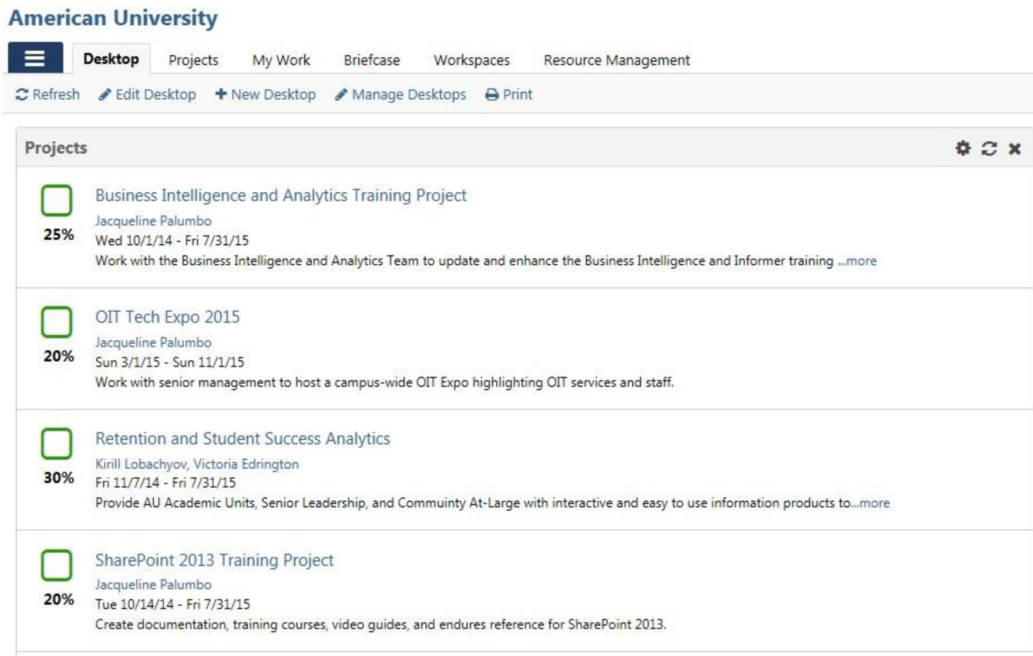
UPDATING PROJECT STATUS

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

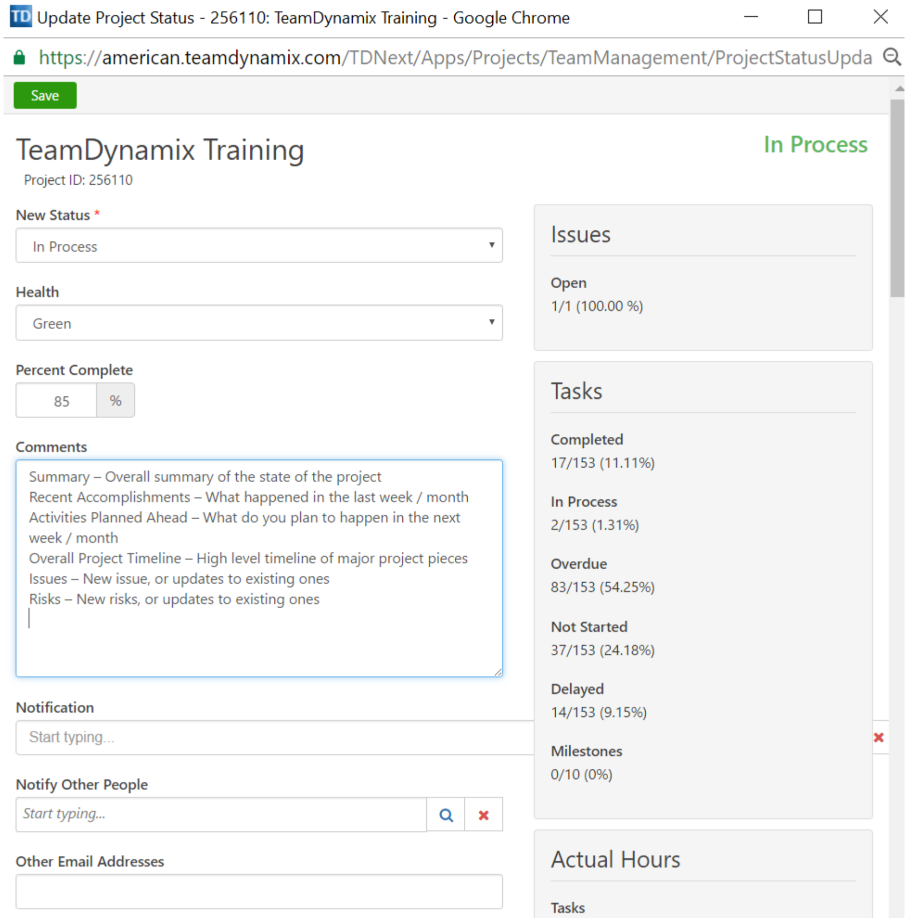
To update a project:

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



2. Click **UPDATE STATUS**

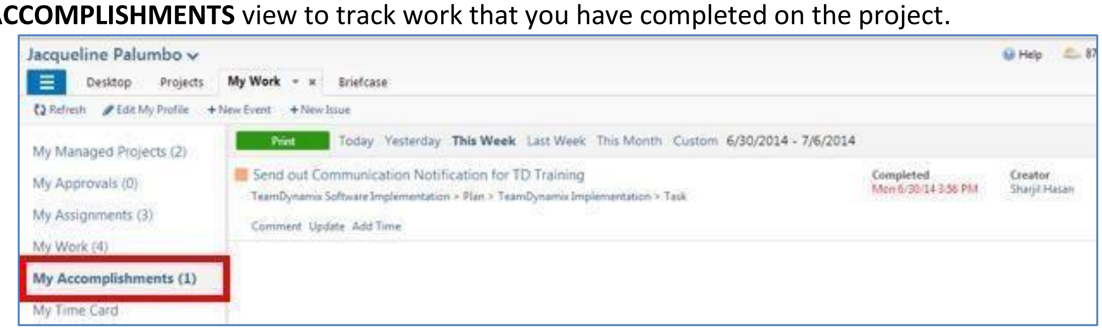
3. Fill in the following fields and click **Save**. See screen shot below.
   - **New Status** – From the drop down list, select 'In Process', 'New', or 'On Hold'.
   - **Health** – From the drop down list, select 'Green', 'Yellow', or 'Red'
   - **Percent Complete –** Enter the percentage completed 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.



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

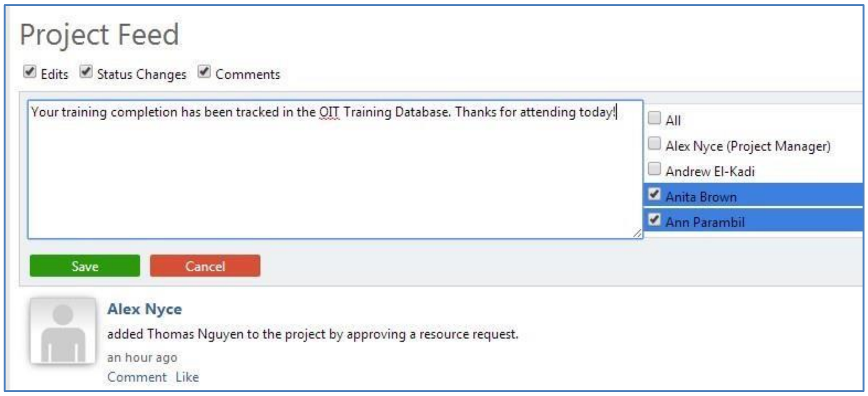
TRACK ACCOMPLISHMENTS

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



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.

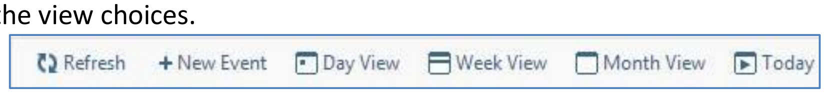
1. Click the **Project Name** in the navigation pane of the **Project Desktop**.
2. Click **FEED**.
3. Click **COMMENT** to contribute directly to the Feed. Select the Team Members you wish to notify by email.
4. You can select **LIKE** any entries in the Feed.



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.

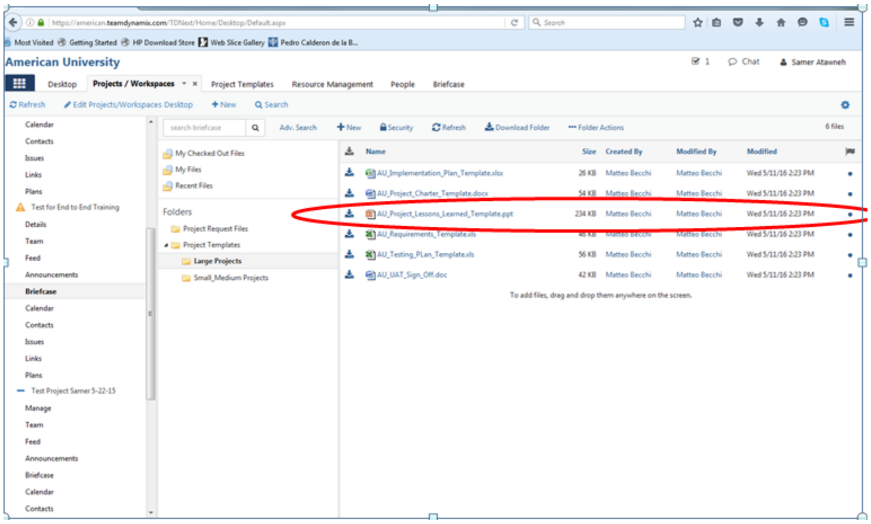


4. You can also click **SHOW** to select what to display on the calendar.

CLOSING OUT A PROJECT

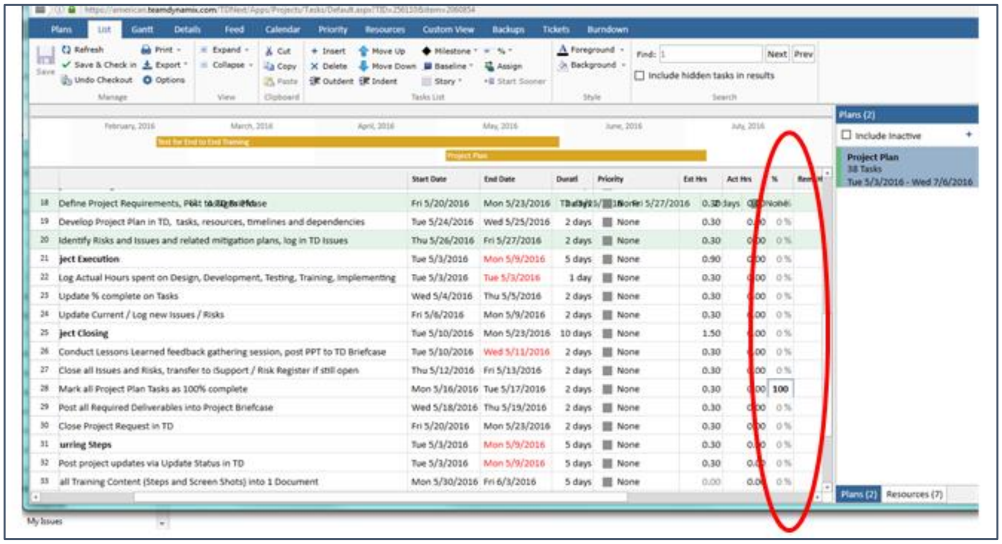
You will need to complete all five steps in order to close a project.

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



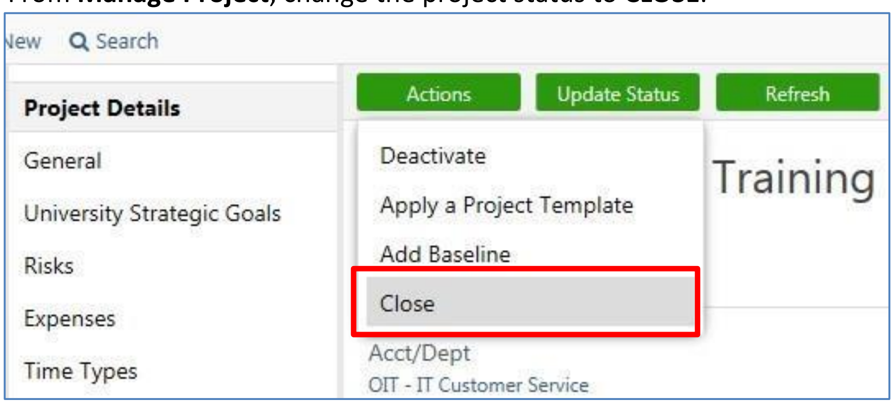
2. Close all Issues and Risks, transfer to iSupport / Risk Register if still open

3. Mark all Project Plan Tasks as 100% complete

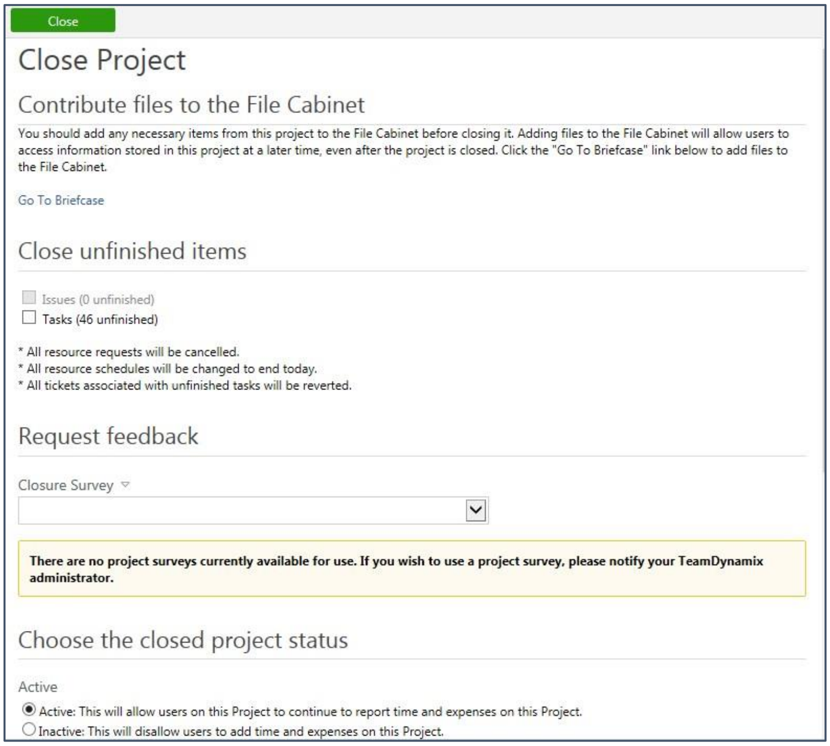


4. Post all Deliverables into the Project Briefcase

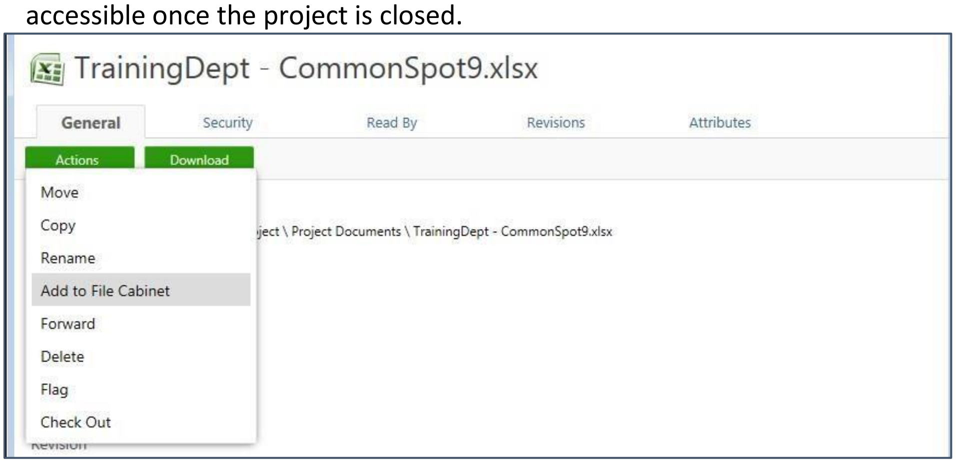
5. Close Project Request in TD
   a. From **Manage Project**, change the project status to **CLOSE**.



Complete the close process, then click the CLOSE button.



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.



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%) □ 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.

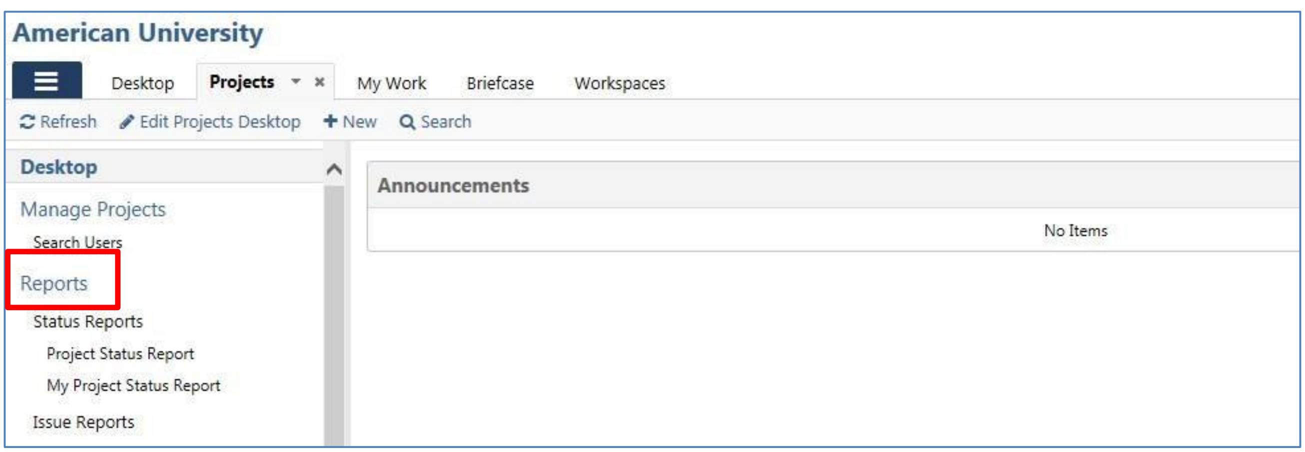
BBPM REPORTS

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

1. Task Report
2. Issues Report

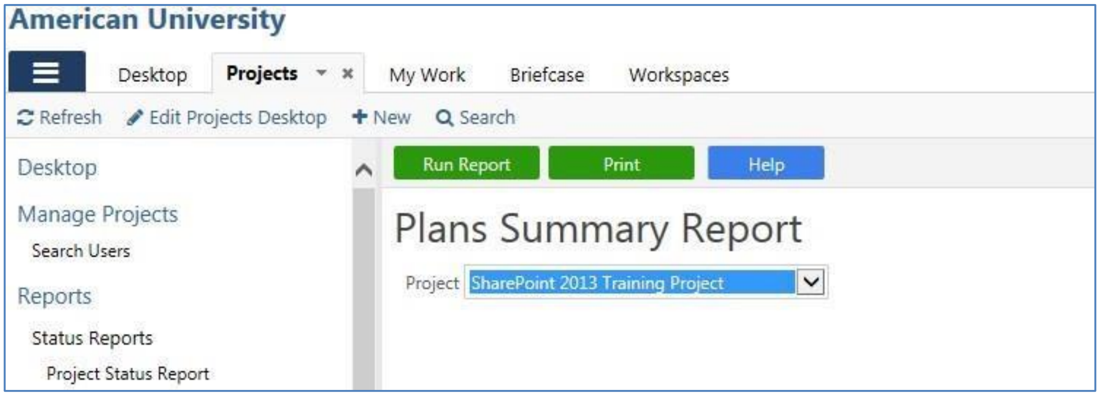
RUN A REPORT

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

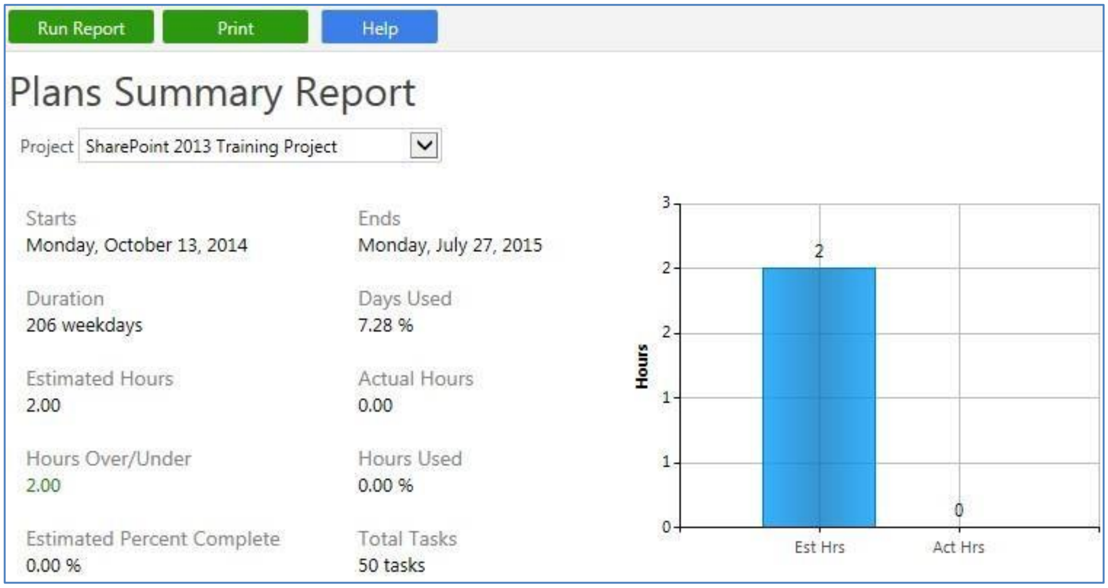


2. Select the **Report** type, e.g. Plan(s) Summary Report.
3. Select the **Project**.

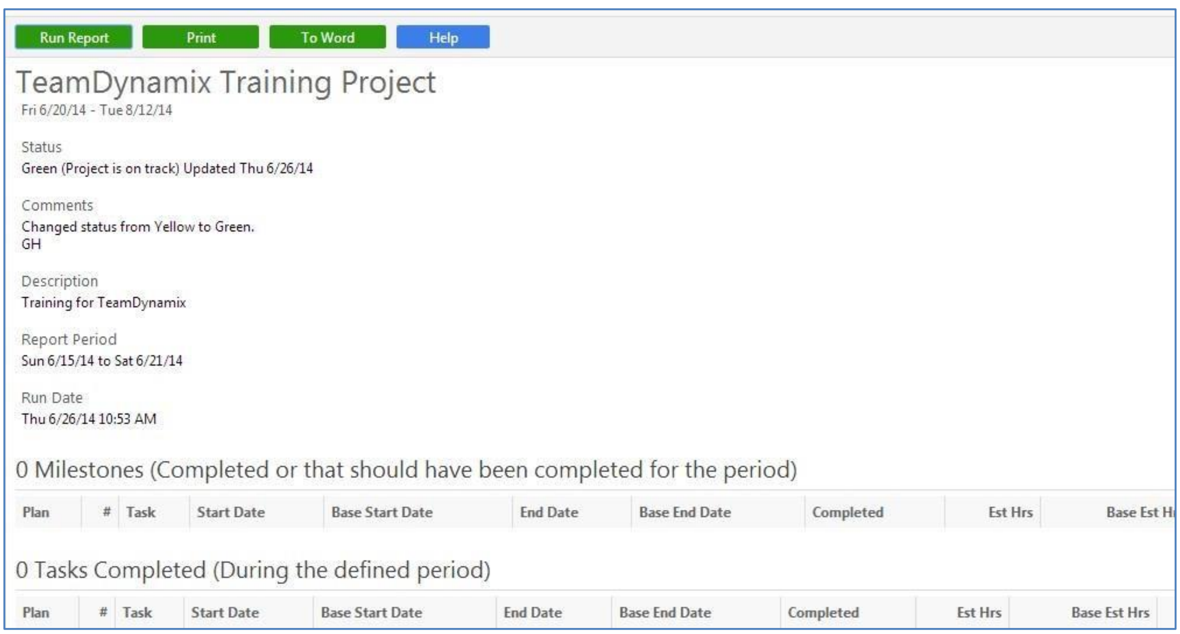
4. Determine the **Report Parameters**.
5. Click **RUN REPORT**.



6. The report will display.

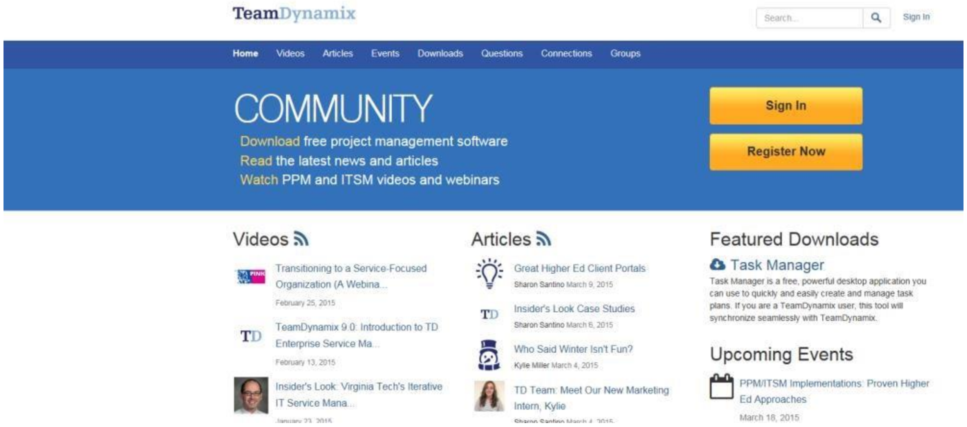


7. Some reports, including Status Reports, allow you to export directly to Microsoft Word.



SETTING UP A COMMUNITY ACCOUNT

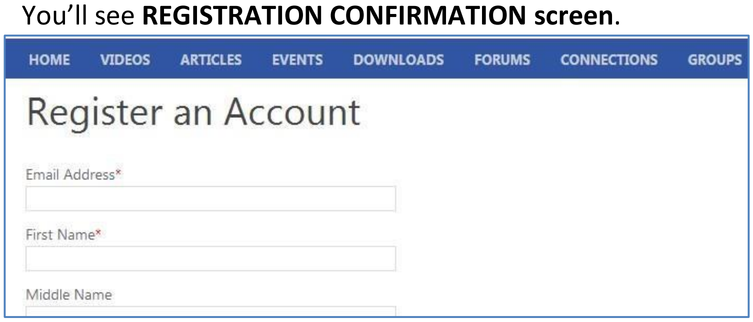
It is recommended that you set up your Community Account before working with the interface. It is recommended that you set up your Community Account before working with the interface. The Community page contains valuable information including update notes and videos and webinars.



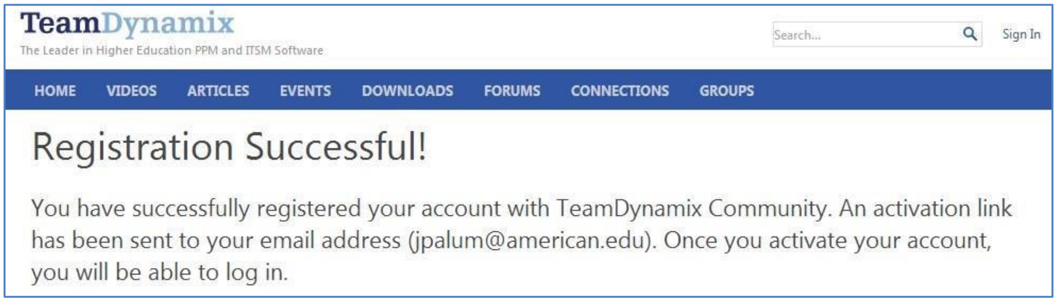
To set up a Community Account:

1. Click the **COMMUNITY** link.

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



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



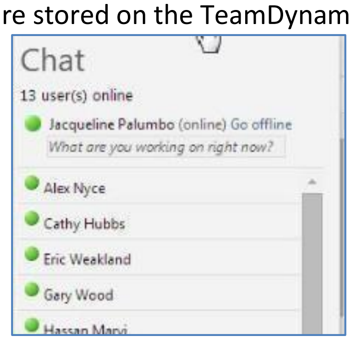
6. Click the **BACK** button on your browser several times to return to the **TEAMDYNAMIX HOME PAGE**.

TEAMDYNAMIX UNIVERSAL WIDGETS

The TeamDynamix Desktop contains four universal widgets:

1. Weather
2. To Do List
3. Chat
4. Sign out

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.



GETTING HELP

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

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