



**University of
New Hampshire**

TeamDynamix: Basic Navigation & Ticketing Version 11.3

UNH Training Reference Manual

*Provided by the Project Management & Process Improvement Office

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What is TeamDynamix?

TeamDynamix is a project, portfolio, and service management software application specifically designed for higher education and used by a variety of organizations within the University System. The application allows departments to effectively simplify, manage and collaborate upon their work – whether large-scale projects or small, repeatable processes - from inception through planning and completion.

What are UNH Teams using TeamDynamix for?

1. *Managing Work*

- Intake of requests: web forms, email capture or manual entry
- Responsibilities/assignments, prioritization
- Status updates

2. *Project Tracking*

- Tasks
- Milestones
- Progress, Status
- Issues
- Project updates

3. *Portfolio Management*

- Reporting
- Strategic Management
- Capacity Planning/Resource Management
- Projects/work in the pipeline

4. *Increased visibility across the team/transparency*

User Roles

Team Member – Manages personal workload, enters work requests, provides updates, can create personal reports and dashboards to assist in work management and may record time if necessary.

Project Manager – Initiates projects, develops project plans, creates custom reports, responsible for updating project status, in addition to same permissions as Team Member.

Portfolio Manager – Capacity planning, workload prioritization, approval of project request, in addition to same permissions as Team Member and Project Manager.

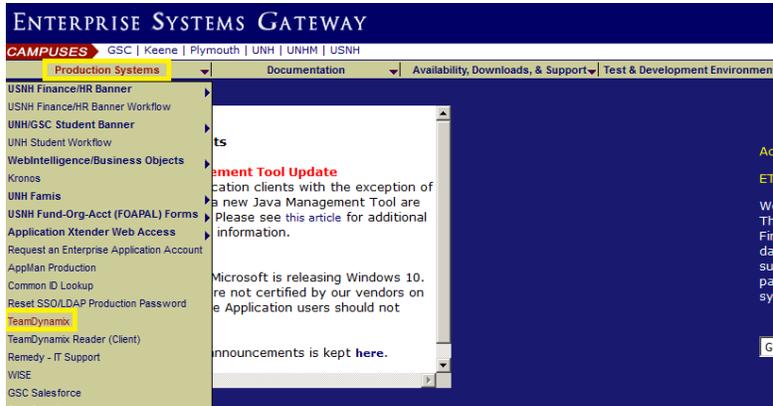
Executive – Receives and reviews reporting.

How to Login

Logging into TeamDynamix Production

TeamDynamix Production is the active system.

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



Logging into TeamDynamix Test

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

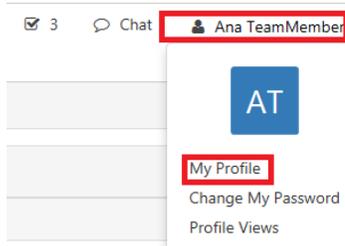
1. Visit usnhgateway.org
2. Click on **Test & Development Environments**
3. Click on **TeamDynamix**
4. Click on **TD Test**



Desktop

Viewing Profile and Adding a Picture

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



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

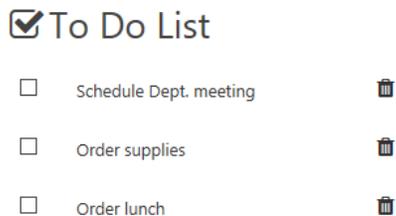
Creating a To Do List

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

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



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

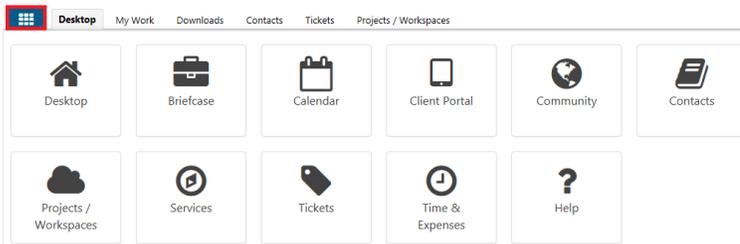


3. Click inside the check box when you have completed each item.

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

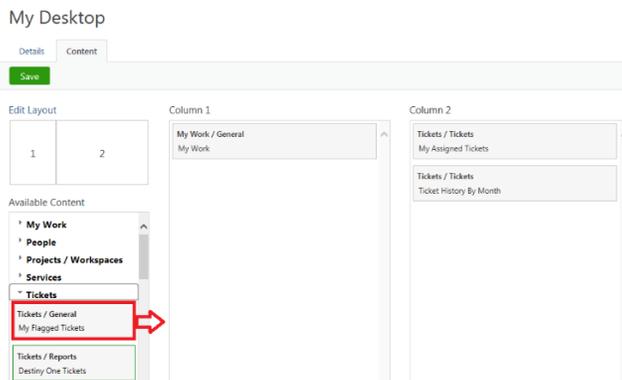
Viewing Applications

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



Arranging and Creating your own Desktop View

1. Click on **Desktop** (top navigator tab).
2. Click on **Edit Desktop**
Note: *New TDx users click on +New Desktop. The New Desktop window will display. Enter a name for the new desktop and Save.*
3. Click on **Content** tab and select the content you would like for your desktop view from the left-hand navigator, **Available Content** area. *Note: Click on the specific application to view all available content. Click and hover over item and drag and drop to your preferred Column:*



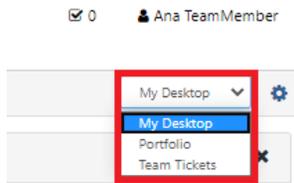
Note: A grey border is a stock report available from the vendor. A green border is a custom report created through the Tickets, Projects, or Analysis module:



4. Click **Save** or if you wish to rename your desktop click on **Details** tab, name your new desktop, **Save**, and close your **Edit Desktop** window.
5. To view your Desktop with changes, select **Refresh** in upper-left hand corner of menu bar.

Switching between Multiple Desktop Views

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



Deleting a Desktop View

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

⊕ Manage Desktops

Name	Default	Shared	Created	Delete
My Desktop	Yes	No	Mon 10/20/14 3:42 PM	
Portfolio	No	No	Fri 12/16/16 10:04 AM	Delete
Reports	No	No	Fri 12/16/16 10:04 AM	Delete

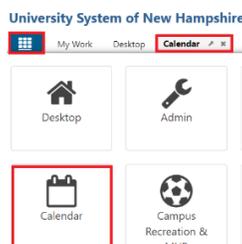
3. Click on ⊕ **Manage Desktops** arrow to return to desktop.

Changing the Desktop Layout

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

Managing Tabs

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



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

My Work

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

What is My Work?

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

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

My Assignments

My Assignments is a master task list with everything you are assigned to for the foreseeable future such as:

- Tickets – Captures small bodies of work under 80 hours of effort.
- Tasks – Tasks on a project plan that have been assigned to you or others.
- Issues – Things going awry on a project (i.e. bugs, risks, testing).

My Work

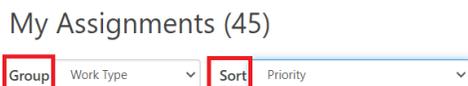
You can move tickets and tasks from My Assignments to My Work to make it easier to focus only on selected tasks that you need to work on that particular day or week.

My Timecard

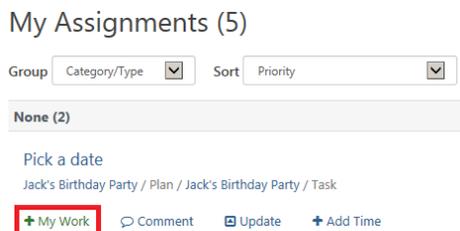
This section allows you to review and submit your timecard.

Moving tasks from My Assignments to My Work

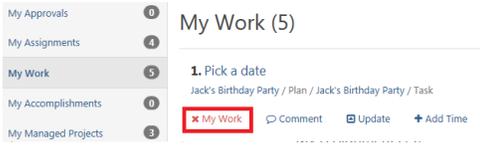
1. Go into **My Assignments**
2. You can use Group and Sort sorting/filtering capabilities:



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

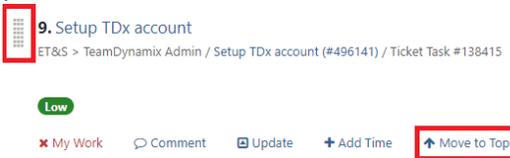


5. The task moves from **My Assignments** to **My Work**
6. To move the task back to **My Assignments** click on **x My Work**:



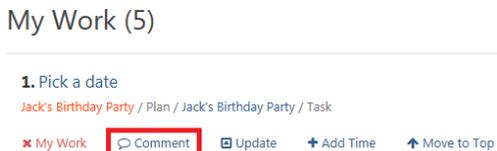
Rearranging Items in My Work

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



Commenting and Notifying in a Task

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



Creating an Issue from your Project Task in My Work

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

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

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

Updating a Task

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

My Work (5)

1. Pick a date

Jack's Birthday Party / Plan / Jack's Birthday Party / Task

✖ My Work Comment **Update** + Add Time ↑ Move to Top

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

My Time Card

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

Adding Time in My Time Card

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

Entering Time in My Work

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

Tickets

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

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

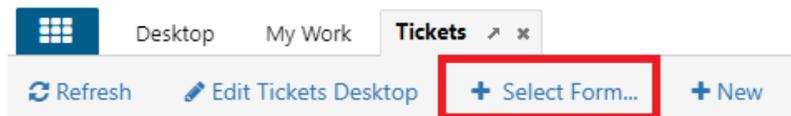
Accessing the Ticket Application

1. Click on **Applications Menu** button .
2. Click on **Tickets**

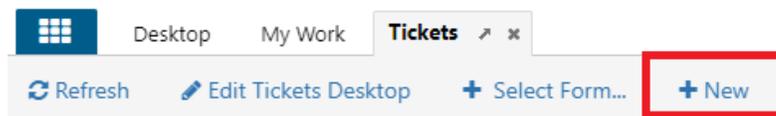
Note: Some Departments have their own Ticket segment and should select their appropriate segment located in the **Applications Menu**.

Creating a Ticket

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



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



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

2. Fill out the following ticket fields and **Save:**

Form – If you know the name of the form you can type ahead. If you don't know the name of the form, select from dropdown arrow, and use slider to choose an Incident or Service Request form.

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

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

Type – Controls assignment and how work is organized.

Requestor – Select person.

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

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

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

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

Description – Provide additional request details.

Attachment – Browse and attach file. If more than one file needs to be attached use your Ctrl key to select more than one file.

Impact – Choose Minor/Localized, Moderate/Limited, Significant/Large, or Extensive/Widespread from drop-down.

Urgency – Skip this field.

Priority – Select Low, Medium, High, or Critical from drop-down.

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

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

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

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

Status – This is a framework, and each group should define how they are using these designations. The following are suggested definitions:

New - Entered, not yet reviewed, and assigned

Open - Ticket has been viewed, acknowledged, and assigned

In Process - Work underway

Closed - Work completed

Pending - Awaiting information

On Hold - Awaiting action from the requestor

Cancelled - Ticket declined and/or withdrawn

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

Location – Skip this field.

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

Estimated Hours – Skip this field.

Time Budget – Skip this field.

Expenses Budget - Skip this field.

Viewing Tickets Assigned to Me in the Ticket Section

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

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

Assigning or Reassigning a Ticket

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

Note: *TeamDynamix Administrators recommend that you assign Tickets to Groups rather than a person.*

Taking a Ticket

1. Open ticket
2. Click on green **Actions** button
3. Select **Take Incident**
4. A pop up will ask, 'Are you sure you want to take primary responsibility for this Incident?'
5. Click o.k.

Updating a Ticket

1. Open ticket
2. Click on green **Actions** button
3. Click on Update

Adding Time to a Ticket

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

Copying a Ticket

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

Adding an Attachment to a Ticket

1. Open ticket
2. Drag and drop file to the **Attachments** area on right-hand side.

Viewing the Ticket Feed

The Feed is an audit trail capturing all activity in the ticket.

1. Open ticket
2. Select **General** tab
3. Scroll to bottom of page to the **Feed** area
4. You can add a comment to the feed by clicking the green **Comment** button
5. Type comment in box
6. Select **Save**

How the Ticket Feed works with Email Reply Processing

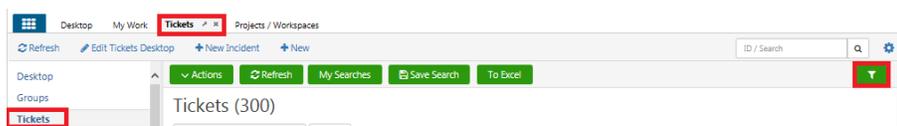
This feature reduces the burden of copying / pasting emails and uploading documents in TeamDynamix.

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

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

Filtering and Searching Tickets

1. Open Ticket Applications
2. Click on **Tickets** in left-hand navigator
3. Click on green filter button in upper-right hand corner



4. Enter search criteria by clicking on magnifying glass to the right of the field you want to use for searching.
5. Explorer window opens.
6. Enter Search Phrase and click on **Search**
7. Check box to the left of Name
8. Click on **Insert Checked**
9. Select **Apply**

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

Creating Ticket Templates from an Existing Ticket

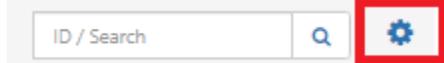
1. Click on **Tickets** in left-hand navigator
2. Open the ticket that you want to use as a template
3. Click on green **Actions** button and select **Create Incident Template**
4. Create Template Name
5. Edit the fields and **Save**

Creating Ticket Templates for Repeating Tickets

1. Open **Tickets** application
2. Click on  gear button in upper-right hand corner
3. Select **New Ticket Template**
4. Fill out fields and **Save**

Locating Newly Created Templates

1. Click on **Settings** wheel in upper-right hand corner:



2. Select **My Templates**

Assigning a Ticket to Workflow

This allows for task and approvals to be completed. Workflows need to be built by a user with Administrative rights. Contact TeamDynamix Administrators if desired.

1. Open ticket
2. Click on green **Actions** button
3. Select **Assign Workflow**

Adding a Ticket to the Calendar

1. Open ticket
2. Click on green **Actions** button
3. Click on **Add to Calendar**

Viewing a Ticket in the Calendar

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

Scheduling Tickets

Scheduled tickets are based upon a ticket template that you create (or that is available to you).

1. Open **Tickets** application
2. Click on  gear button in upper-right hand corner
3. Select **New Scheduled Ticket**

Viewing Scheduled Tickets

My Schedules will display tickets you have scheduled to auto-generate on a regular basis.

1. Open **Tickets** application
2. Click on  gear button in upper-right hand corner
3. Select **My Schedules**

Ticket Tasks

Adding a Task to a Ticket

1. Open ticket
2. Click on green **Add** button
3. Click on **Task**
4. Fill out fields
5. Click on **Save**

Updating a Task

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

Commenting on Tasks

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

Accessing My Work to see your Assigned Tasks

1. Open  Applications menu
2. Open **My Work** application
3. Click on **My Assignments** in left-hand navigator to view tasks

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

Creating a Task Template

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

Ticket Reports

Viewing Standard Ticket Reports

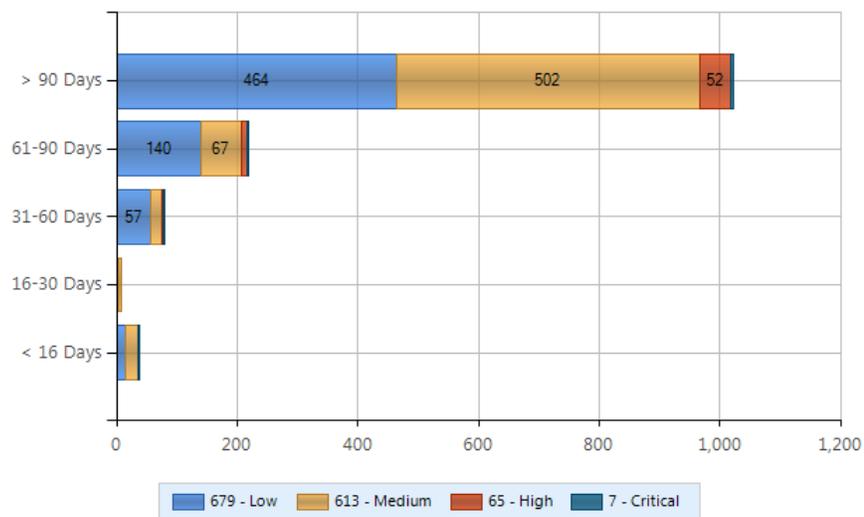
1. Open **Tickets** application
2. Click on **Standard Reports** in left-hand navigator

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

1. Ticket Aging

Ticket age in Days and Priority

Ticket Aging Report (1364)



2. Ticket Performance

Tickets by Account, Type, and Responsible Person

3. Tickets Count Report

Tickets by Person, Average Days Old, and number of Tickets

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

TeamDynamix Support

Join the TeamDynamix Community

<https://community.teamdynamix.com/>

Register for UNH TeamDynamix Classes

<https://ittraining.unh.edu/apps/ssr?action=category&id=33>

Search the UNH IT TeamDynamix Knowledge Base

<https://td.unh.edu/TDClient/KB/?CategoryID=130>

Submit a UNH TeamDynamix Support Form

<https://td.unh.edu/TDClient/Requests/ServiceDet?ID=120>