Administrator's Guide for TeamDirection Project 3.1

Table of Contents

The Basics

Software Release
This Guide is intended for users of TeamDirection Project 3.1.6 and above

Customer Support
Visit our Support pages at www.teamdirection.com

Forum and Knowledge Base
Visit us at http://www.teamdirection.com/phpBB2/ for important announcements, troubleshooting, and solutions to known issues

For the latest Product News
http://www.teamdirection.com/tdweb/products/preview.php

New in Project 3.1.6

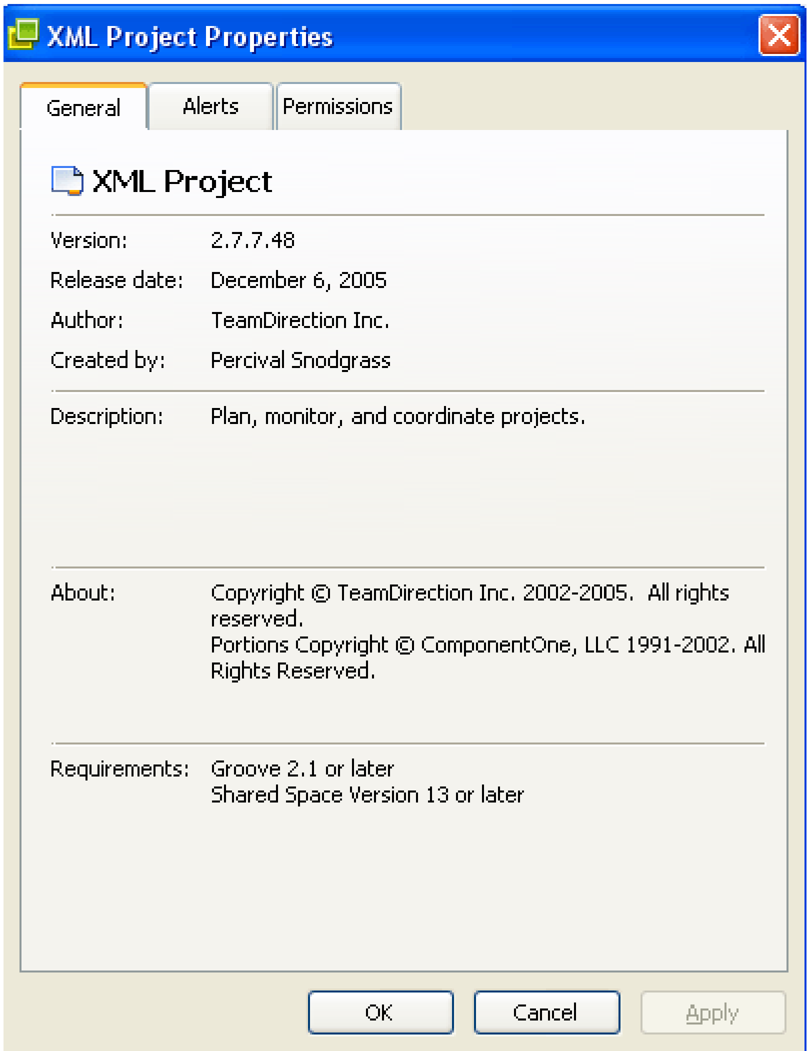
This release has the following changes and new features:

- Import from Excel
- Custom Properties
- End-user experience customization for
    - Controlled vocabulary
    - Dashboard folder hierarchy

Software Version

The TeamDirection Project version number, which is 2.7.7.48 in the image below, is useful when corresponding with Customer Support.

To view it, select "File | Properties| Tool" from the menu and the Properties pop-up will appear.



User Experience Customization

There are several files which can be used to customize the end-user experience. If any of these files are in the TeamDirection folder, then the file will automatically be used to customize the user interface. The TeamDirection files are located under Groove's main installation directory. For example, if you installed Groove to its default location, then the TeamDirection files will be in the directory:

C:\Program Files\Groove Networks\Groove\Data\ToolData\teamdirection.com\tdproject\v2x

The four files used to customize TeamDirection Project and Dashboard are:

TDProjCats.xml	Controls the available project categories
TDProps.xml	Controls available custom properties and controlled Vocabulary Lists
DefXLMapping.xml	A default Excel mapping file used when importing Excel workbooks into TeamDirection Project
DPBT.mdb	A default Dashboard folder hierarchy and table settings (see the use case "Creating a Default Dashboard Folder Hierarchy"

Once the desired files have been created, refer to the TD Deployment Tools User Guide (contact TeamDirection Support) for deployment options and instructions.

Project Categories

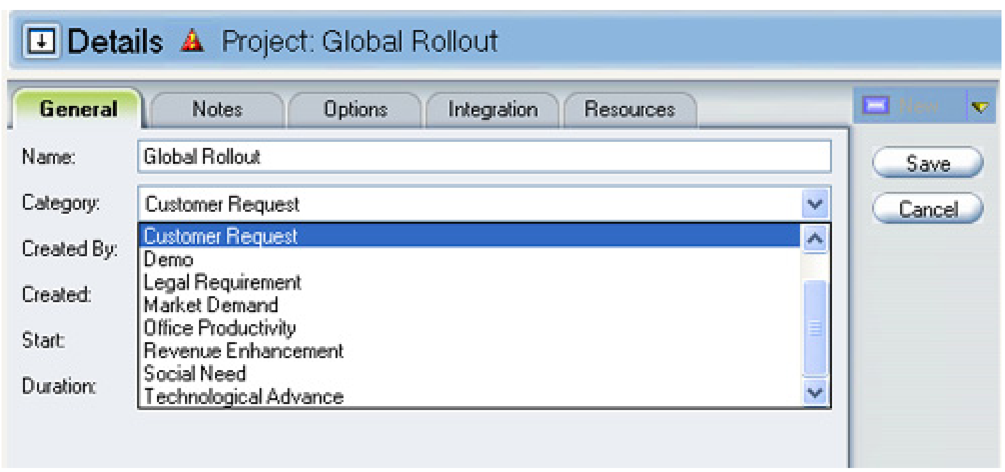
By default, TeamDirection allows users to type any value in the project category text-box field which is found in the *Detail* pane’s *General* tab. However, if the ***TDProjCats.xml*** file is placed in the TeamDirection files directory, then the text-box becomes a drop-down box and users are only allowed to select those values which appear in the drop-down list.

Note: After placing the file in the TeamDirection directory the user must close and reopen the project before the new settings take effect.

The format for the TDProjCats.xml file is as follows:

```
<?xml version="1.0" encoding="UTF-8"?>
<Categories>
   <Category>
      <DisplayValue>Customer Request</DisplayValue>
   </Category>
   <Category>
      <DisplayValue>Demo</DisplayValue>
   </Category>
      ……
<Categories>
```

This file may be edited using any text editor. The example above demonstrates the result if more of the categories had been entered. When the user clicks on the *Edit* button in the *General* tab of the *Details* pane, a list such as the following is displayed:

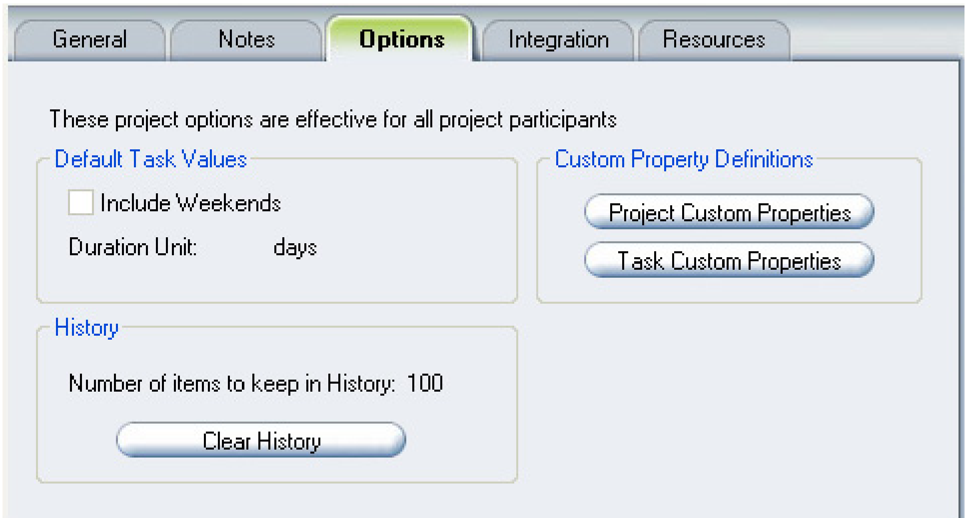


The “<None>” option is used to clear out previously selected values. Be sure to click on the *Save* button before exiting to save your settings.

Custom Properties

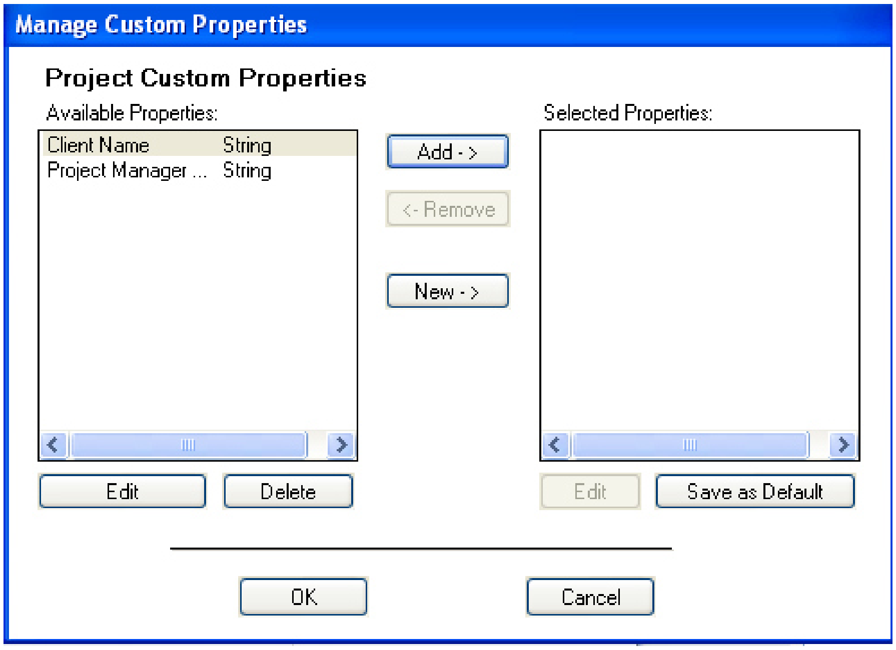
By default the task data includes the following properties: Name, Resource(s), Start Date, Finish Date, Duration, Priority, % Complete, Include weekends (yes or no), and Notes. In order to provide additional fields (aka properties or attributes) a file named ***TDProps.xml*** must be created and placed in the same directory as indicated above.

Selecting the project row in the task grid, then the Options tab, you will see a new section called *Custom Property Definitions*. Utilize these buttons to begin creating your custom property definitions.



Creating New Properties

Custom properties may be defined at the project or task level by clicking the appropriate button, causing the Manage Custom Properties dialog to appear.



The Available properties list on the left is the list of all custom properties in the manager's projects. These are shown to enable the use of consistent names. For example, if the manager sees that the word "Cost" has been used previously, he may choose to use the same label if it has the same meaning.

The Selected Properties list on the right is the list of custom properties for this project.

To create new Project or Task custom properties:

- Click on either the *Project Custom Properties* or *Task Custom Properties* button
- Click the *New* button
- Enter the *Display Name* you wish the users to see
- Enter the field type of the property; that is, will this be a string, a decimal number, an integer, or a date field.
- In the *Possible Property Values* list box enter the values which are permissible in this field. These are only applicable to data that has the string data type.
- Click OK

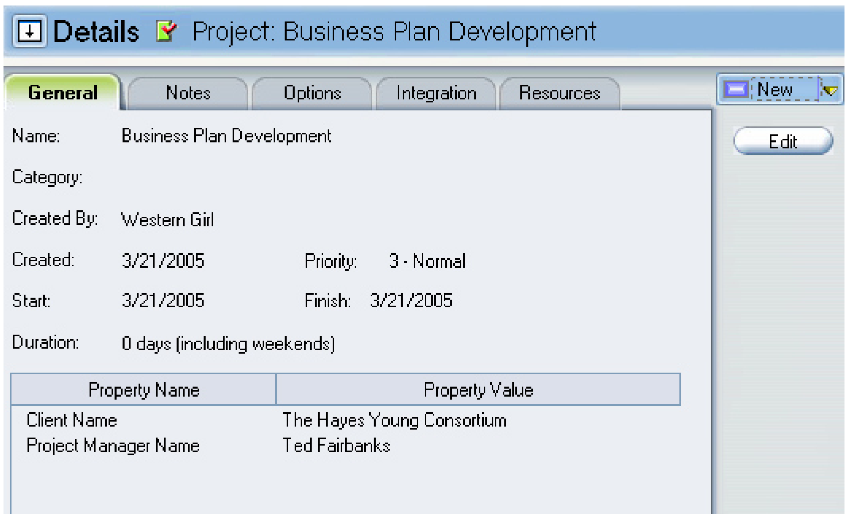
When Save as Default is chosen, the properties are written to the TDProps.xml file and may be made available for general distribution. This will cause the default attributes to be made available in the General tab of any new projects created.

Using the New Properties

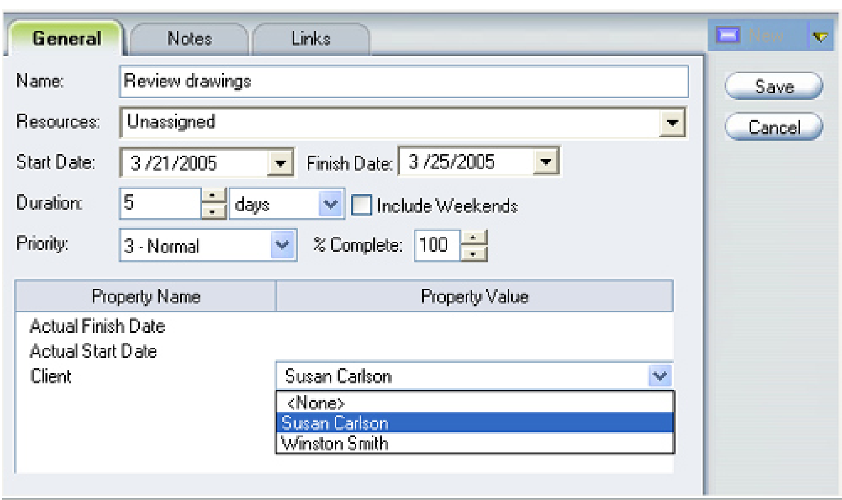
Once the custom properties are created for the project

- The custom task properties will be available as columns in the project's task grid
- The custom project properties are available in the Detail pane's *General* tab
- These custom properties will also display in the TeamDirection Dashboard tool once chosen from the Show list
- These custom attributes will be exported in the Export to Excel function

In the General tab, the custom properties will appear in a grid as seen below:

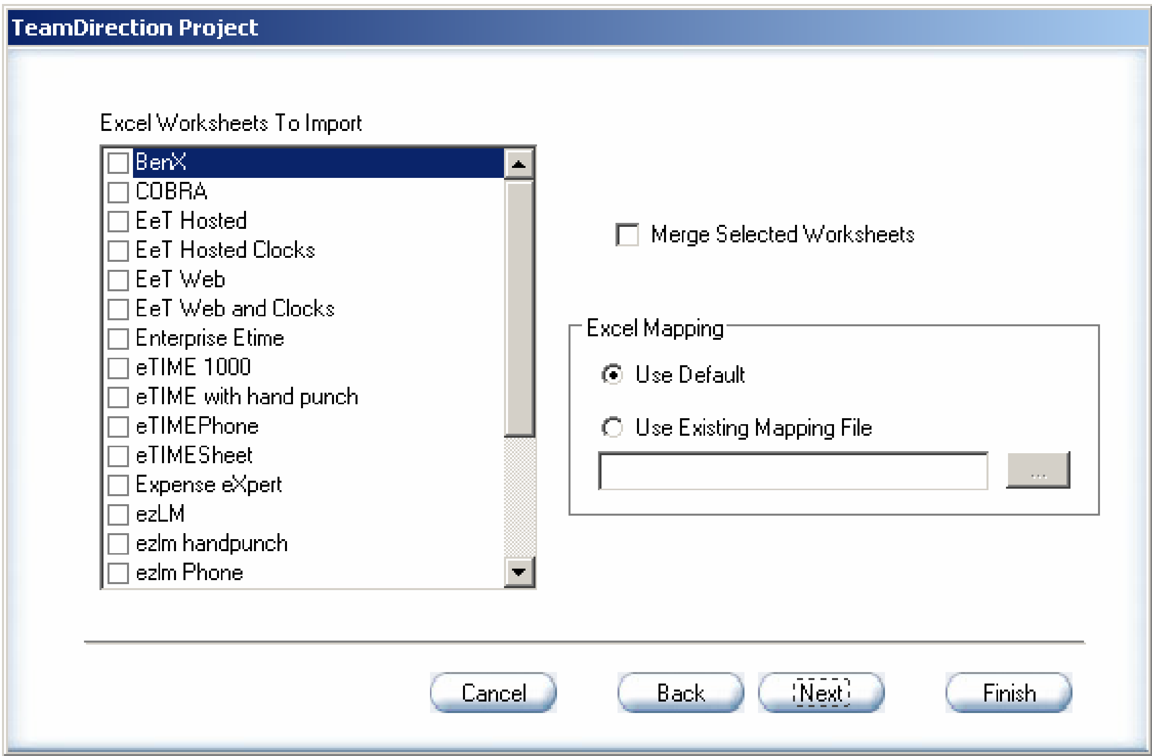


Allowable values are determined by the data type and whether or not a list of values was pre-defined for that property. If it was, then the user may only choose from the constrained list as seen below:



Customizing Excel Import

When using Excel as the data source for populating TeamDirection projects, it is necessary to map the incoming data to the desired fields in the Project tool. Any number of mappings may be defined and saved for future use, and if one is saved with the name DefXLMapping.xml, then it can be used as the default in future to save time. See the Use Default radio button below.

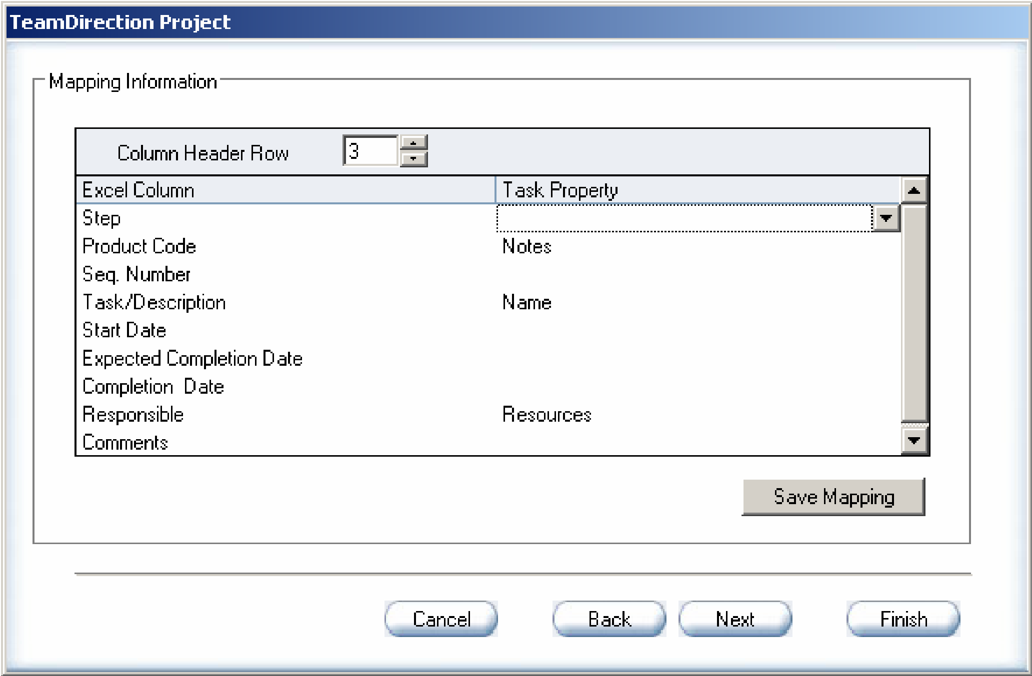


By default, if more than one sheet is selected, the tasks from the second sheet will be appended to the project after tasks from the first sheet.

The option to merge is only displayed if the default mapping file specifies a SortColName referencing an existing field. This field is the one that will be used to merge worksheets if more than one worksheet is selected for import.

On the Mapping Information screen you will see which Excel column values are mapped to Project properties. It is possible to have fields specified in the mapping file that do not exist in the actual project and these are ignored. When viewed in the Mapping Information dialog, the TD Property column value is left blank.

Mappings may include custom properties.



In the screen shot shown above, only data from the Product Code, Task/Description and Responsible columns will be imported. If no value is mapped to the task name property, then *New Task* will be used.

Specifying a merge column

The user interface does not currently allow for specifying a merge column, and therefore the xml file must be edited for this purpose (see below). In the example shown, Seq. Number is being specified as the column to sort on. It must be an integer.

```
<Mapping>
  <SortColName>Seq. Number</SortColName>
  <MappingItems>
    <MappingItem>
      <ExcelColumnName>Step</ExcelColumnName>
      <TDPropName>Step</TDPropName>
    </MappingItem>
    <MappingItem>
      <ExcelColumnName>Product Code</ExcelColumnName>
      <TDPropName>Notes</TDPropName>
    </MappingItem>
  </MappingItems>
</Mapping>
```

To enable the summary/subtask relationship using the Sequence Number method, a custom property named Sequence Number with data type Integer must be created. Then it must be populated as follows: values which are a multiple of a hundred (200 for example) represent summary tasks, while those such as 231 would represent sub-tasks below the summary task.

Customizing the Dashboard Folder Hierarchy

The default folder hierarchy for Dashboard is maintained in a file called DPBT.mdb and may be generally deployed to define a default folder hierarchy for users.

It may be customized as follows:

1. Using windows explorer, go to the TD Project install directory as noted in the beginning of this document.
2. Make a copy of the original DPBT.mdb located in this directory and store it somewhere so that you can always return to its values
3. Move or delete your current user settings file from the TeamDirection directory.
   a. This file will look something like the following: *170290326708_TR.MDB*. The exact name will differ depending on your Groove user ID. If there are multiple files with this format for the name it means multiple Groove users have accessed Dashboard from this machine.
   b. Copy all of these user files to a different directory location if you wish to be able to retrieve them later or simply delete them.
4. Start TeamDirection Dashboard.
5. Upon startup there should only be the single *All Projects* folder and all the Dashboard settings should be reset to their original values.
6. Make changes to Dashboard so that the application reflects the desired default state.
   a. Create the desired folder hierarchy
   b. Make the desired changes to the way data is displayed in the tables on the right hand side of the Dashboard.

      Note: each table on the different task tabs has its own settings. So, even though the *Tasks* and the *My Tasks* table look similar, the table settings are stored separately.
7. Adjust the rest of the fields to the desired states which will become the default for all users using this *DPBT.mdb* file. For example, if you want the *Select All* checkbox to be selected when a user first uses the application or restores the application's original settings then check the box now.
8. Close Dashboard.
9. Return to the TD Project install directory as described in the beginning of this document.
10. There should be a single user settings file (the format is described above.
11. Copy this settings file to a different directory and rename it "DPBT.mdb". This is the file that you will want to install for your users when you deploy the Dashboard application.

Deploying the Files

To deploy any or all of these files, copy them to the user's TeamDirection v2x directory. The files affecting TeamDirection Project will take effect once the user restarts Project. However, the DBPT.mdb file for customizing Dashboard will not affect users who are already using the Dashboard until they click on the *Reset Folders* option in their configuration screen.

Activation

The Basics

When you first install **TeamDirection Project** on your machine, there is a free **60 day evaluation period**. The product is fully functional, all features are enabled and there are no limitations to the number of tasks or milestones. When this evaluation period expires, the product enters a **Preview Mode**,

What is Preview Mode?

TeamDirection Project can be used freely in preview mode. In this mode you are limited to 5 tasks or milestones. All the other features are enabled. To remove the 5 task limitation you need to activate the product. Activation requires either a Groove Project Edition License Key or a TeamDirection License ID/Password combination or Registration Code.

What is a License?

A license enables you to use TeamDirection Project without any limitations for a single Groove account on up to 5 machines. You can purchase a license directly from within TeamDirection Project by invoking the activation wizard (see below). The license can also be purchased directly from the TeamDirection Web Site or from Groove Networks as Groove Virtual Office Project Edition.
When you buy a license from TeamDirection, you get a License ID and a Password, which you then use to activate the product.

If you purchase Project Edition from Groove Networks, you already have a license and are able to activate with the Groove Activation Key (see below).

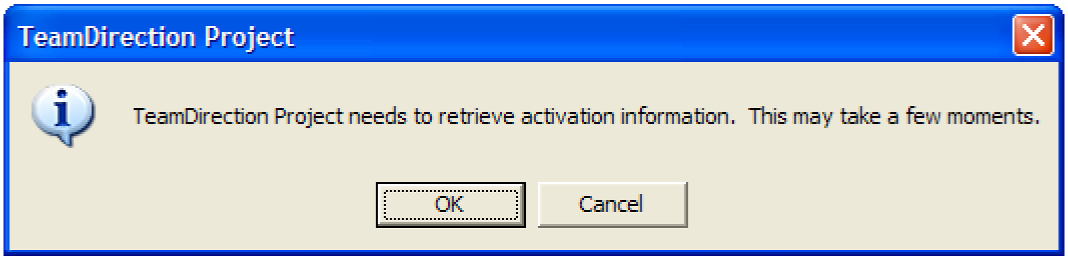
What is the Activation Wizard?

The activation wizard guides you through the activation process. It is invoked in two ways:

1. Click the OK button when you first open the space and are prompted with the activation dialog:

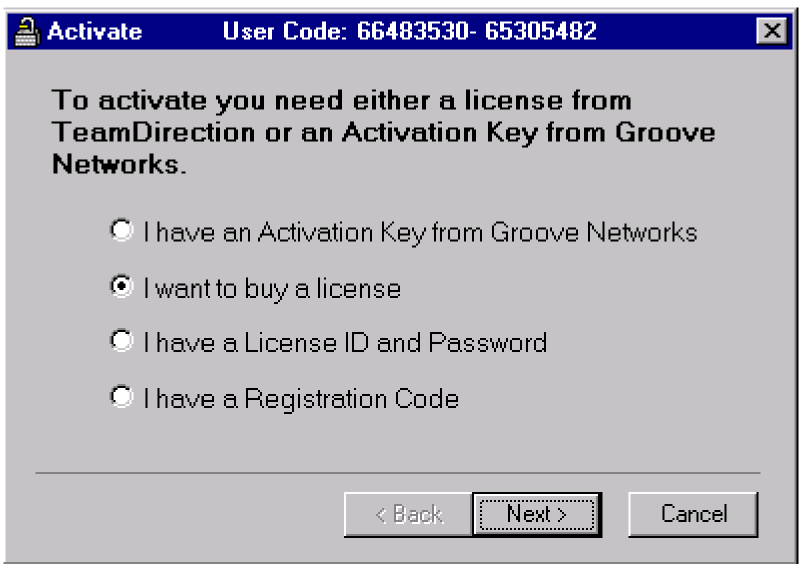
2. At any time click the 

button on the toolbar. The dialog shown below will appear. Click OK.



Purchasing a License

Invoke the Activation Wizard as above. You will then see the activation dialog which will send you to the TeamDirection Web Site Purchase page if you choose the "I want to buy a license" option:



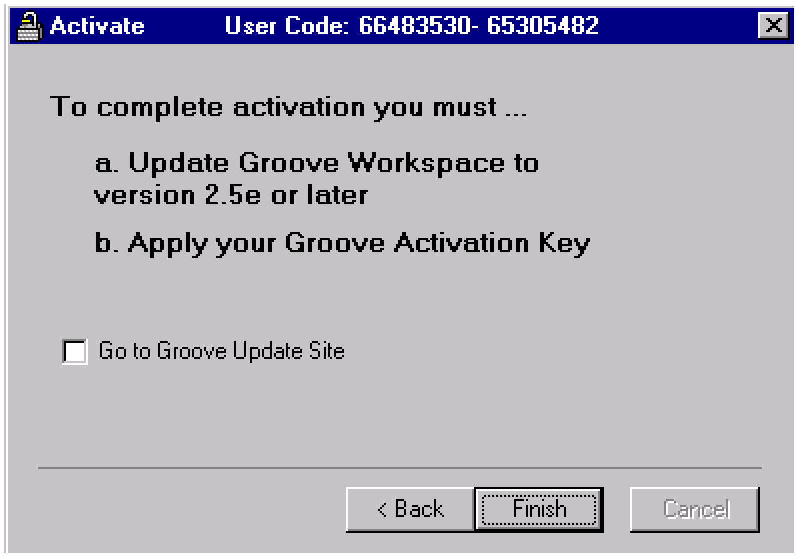
NOTE: If using American Express you may need to put "0000" for the CVV2 number or the charge will not go through.

Activating with a Groove Activation Key

If you purchased Groove Virtual Office Project Edition (formerly Groove Workspace Project Edition) which includes TeamDirection Project and Dashboard, you will activate the software using your Groove Activation Key.

Before doing do, you must be running Groove Workspace 2.5e or later. To upgrade to the latest Groove Workspace release, visit their web site at www.groove.net.

Once you are running an appropriate release, the product will activate automatically if you have activated your Groove edition. Otherwise, choosing "Activate Product" from the Help menu will allow Groove to be activated.



There are no other messages after clicking Finish.

Activating with a License ID and Password

This section is only relevant if you purchased licenses through TeamDirection rather than Groove Networks. There are 2 ways to activate with a License ID and Password:

1. Activating Online

When you buy a license you receive a License ID and a Password.

A. If you bought the license online using the Activation Wizard, the dialog below will appear

Enter your License ID and Password and press Activate.

B. If you bought the license directly from the web site or got the License ID and Password from your administrator, you need to:

1. Invoke the activation wizard.
2. Choose "I have a License ID and Password" and press Next.
3. Choose "I want to activate online" and press Next.
4. Enter your License ID and Password and press Activate.

2. Activating by email

If you have a License ID and a Password but need to activate by email:

1. Invoke the Activation Wizard.

2. Select "I have a License ID and Password" and press Next.

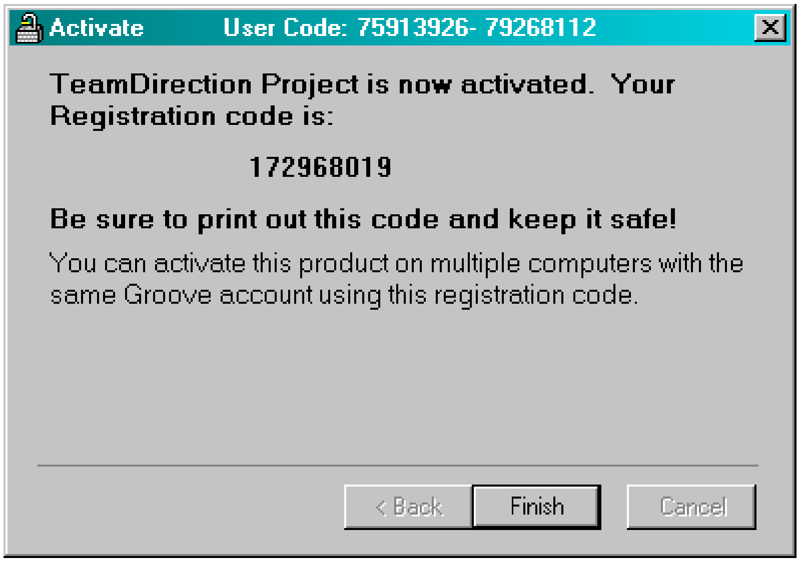
3. Select "I want to activate by email" and press Next.

4. You will be prompted to enter your License ID and Password and your email editor will be started. The email text to be sent to TeamDirection for activation will contain your User Code, License ID and Password.

5. You will receive an email reply with a Registration Code that you will be able to use to activate (see Activating with a Registration Code below).

The Registration Code

After successful activation, it is possible to find the registration code by pressing the Activate button once more. It will be displayed as follows:



Activating with a Registration Code

This section is only relevant if you purchased licenses through TeamDirection rather than Groove Networks.

What is a Registration Code?

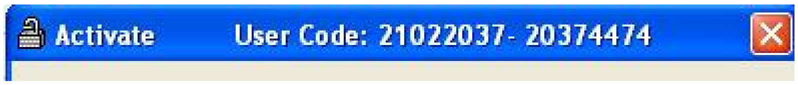
The Registration Code is a number which enables you to activate if you do not want to activate online using a License ID and Password.

What does the Registration Code do?

If you bought a license, your license record is stored on the TeamDirection Licensing Server.
When you want to use your license to get your product activated, your User Code is registered with the Licensing Server and you get back a Registration Code, valid only for this User Code.
This Registration Code is then used by TeamDirection Project activation software to activate the product for your Groove Account.
This process happens online, automatically, if you activate online using your License ID and Password**.** You can also use the Registration Code offline, manually, to activate the product (see below).

What is the User Code?

Your User Code is a number associated with your Groove Account. You can see your User Code on the top blue caption of any dialog box in the Activation Wizard:



When do I activate with a Registration Code?

You can use the Registration Code to activate in the following 3 situations:

1. You activate by email. You will send your User Code and get a reply containing your Registration Code.
2. Your administrator has bought a license pack for your group. Your administrator will then ask you for your User Code. Once he gets your User Code, he will give you a Registration Code enabling you to activate.
3. You use the same license to activate on multiple machines. You get your Registration Code from one machine which has been activated, by pressing the  button. You can then use this Registration Code to activate any other machine for the same Groove Account (same User Code).

Activating with a Registration Code

To activate with a Registration Code, do the following:

1. Invoke the Activation Wizard and click OK to the first message box.

2. Select **"**I have a Registration Code**"** and press Next.

3. Enter your Registration Code and press Finish.

Activating on multiple machines

1. Get your Registration Code from any machine which has already been activated for your account. You do this by pressing the  button on the toolbar and reading the Registration Code displayed on the pop-up dialog box.

2. Go to the other machine where you have not activated yet TeamDirection Project**.** Make sure it runs with the same Groove Account.

3. Press the button. You will see the Activation Wizard dialog box.

4. Select **"**I have a Registration Code**"** and press Next.

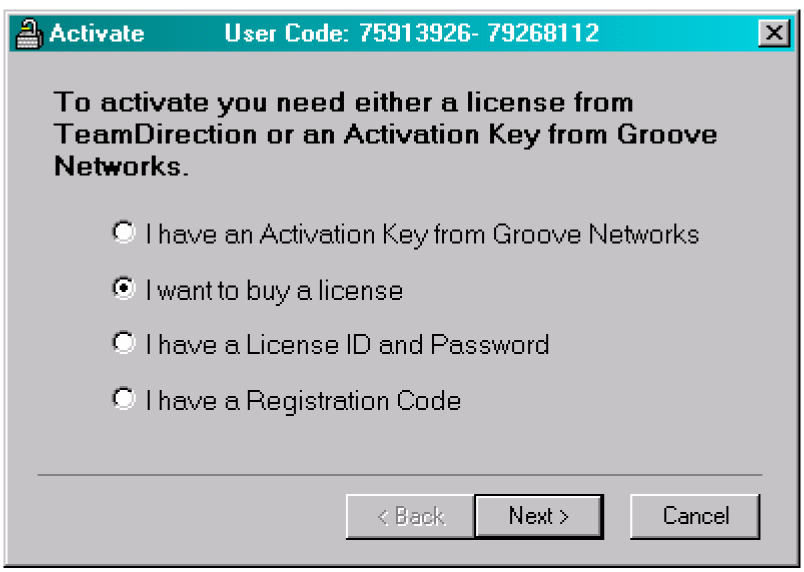
5. Enter your Registration Code and press Finish.

Managing a Group License

When you buy a license for multiple seats for your company or workgroup, you need to distribute the license seats to your group members and have them activated.

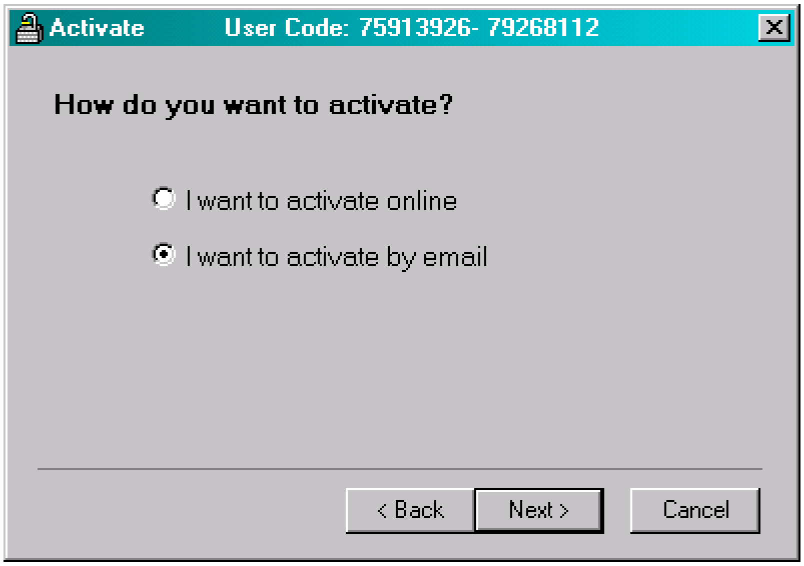
There are two methods to do this:

- If you send each user your License ID and Password, they can enter these into their product activation wizard and get activated online automatically.
- You can use the License Console available in the Support area of the TeamDirection web site (http://www.teamdirection.com/tdweb/support/registerLic.php). This option requires you to manually generate Registration Codes for each user, but provides complete control on how the license seats are distributed. In order to activate a user with the License Administrator console, you need to know the **User Code** of the person you want to activate. You can find this number by having the user push the **"Activate"** button on their TeamDirection Project toolbar. The User Code is displayed in the top caption of the activation wizard in the user copy of the product.



First screen in activation wizard

- You can also obtain the User Code from the user by having them select "I have a license ID and Password" then select "I want to activate by Email"



Activate online or by Email option screen. Note the user code in the title bar of the window

- Once the user clicks on *Next*, they will be asked for a License ID and Password. Since they do not have these, and you don’t need it anyway, they can input any number for the License ID and any alphanumeric text for the PW.

- Clicking *Activate* will automatically generate an email which contains the user’s Groove User Code.

- Have the user change the *To:* address to be the admin person and send the Email.

There are 5 steps in activating a user via manual registration and activation:

1) The user sends in a **Groove User Code**
2) The admin enters a valid **License ID, Password and the User Code** in the License Administrator Console on the TeamDirection web site, and clicks Submit
3) A corresponding **Registration Code** will be displayed
4) Send the **Registration Code** back to the user
5) The user enters the **Registration Code** in the activation wizard to activate their install of the TeamDirection Project.