User Guide for TeamDirection Dashboard

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Introduction

Learning TeamDirection Dashboard

Welcome to TeamDirection® Dashboard, the project aggregator that allows you to monitor all of your TeamDirection (TD) projects across multiple Groove workspaces from a single interface. Since Dashboard automatically finds all TD projects that you are a member of, most people find it convenient to place the Dashboard tool in a Groove workspace of its own.

You can organize your projects in folders and subfolders. The project folders can be created manually or set up to collect projects automatically based on a set of search criteria.

Most people require little or no training when using the Dashboard. Thanks to the graphical elements which can be easily affected using drag & drop and point & click actions, there is little complexity in the interface. However, to maximize the benefit obtained from your new tool, it pays to read the topics presented in this manual, as well as viewing the demo on the TeamDirection web site.

Need more information?
Read the following topic on Getting Started

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

Software Release
This Guide is intended for users of the TeamDirection Project Dashboard 3.1.2 (internal version number of 2.7.5.104 and above).

New in Dashboard

This release replaces the Dashboard previously shipping with TeamDirection Project. It is easily recognized by its foldering pane on the left-hand side of the user interface. Previous versions of Dashboard did not have foldering.

The new features are:

- The ability to organize projects into folders and create groupings of projects by dragging-and-dropping projects to folders, or by specifying characteristics such as those projects behind schedule (pages 5-10)
- Conveniently report % complete on tasks from multiple projects directly from the Dashboard
- User Interface customization - each user now has the ability to show/hide columns and re-order columns. These preferences are saved automatically, as in TeamDirection Project.
- Export your data to Excel, based on selected projects or tasks. You may write into a specific worksheet within a workbook, thereby having multiple projects written to the same workbook, each with its own worksheet.
- Easily generate a Status Report for one or more projects

Last Revision Date

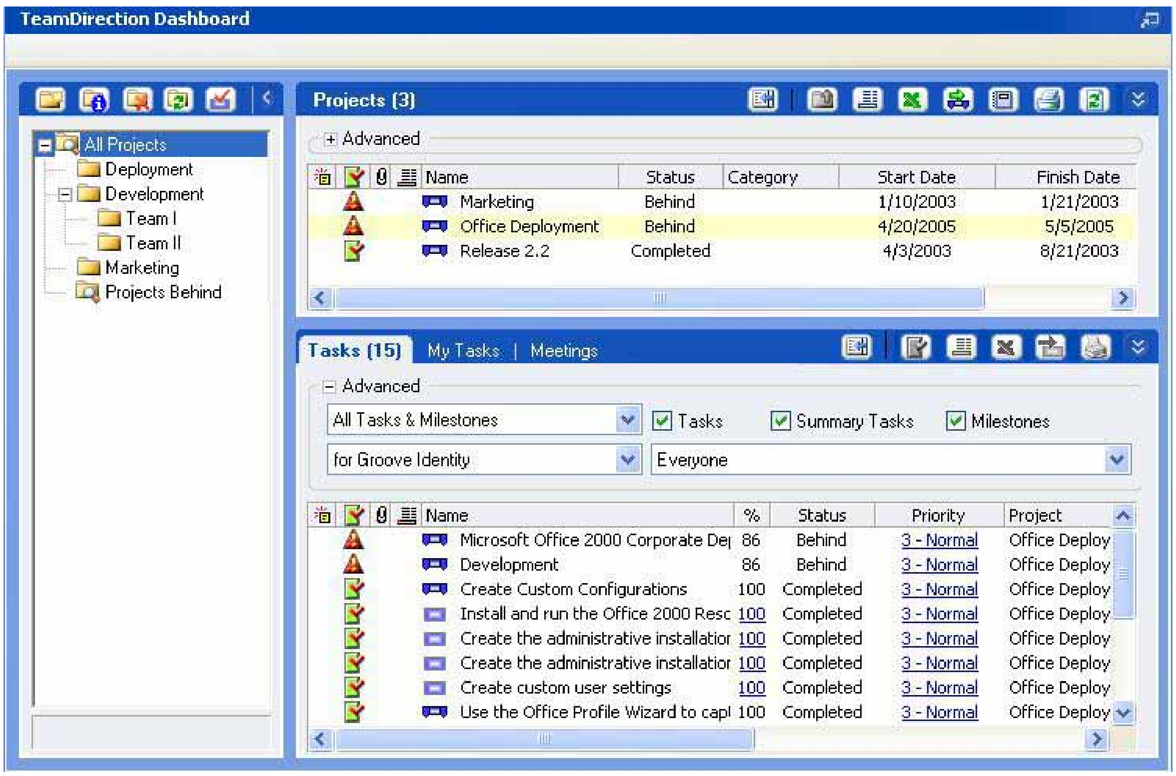
20-Sep-05

Getting Started

While Dashboard is intuitive and simple to use, there are several main functions that users should familiarize themselves with to gain the maximum benefit from the tool.

These functions are foldering, determining status for one or more projects, determining where to focus efforts each day, and reporting progress at the end of each day.

As seen below, user-defined folders containing projects are displayed in the leftmost column. Typically when a user enters Dashboard the first time there is only one folder called *All Projects*. The foldering may be independently determined by each user or the system administrator may mandate a pre-determined structure.



The upper right *Projects* pane shows lists all projects in the selected folder. The lower right pane lists the tasks, milestones and meetings for the project selected in the Projects pane.

Dashboard Features

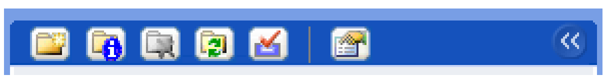
Folders

Projects are organized into folders for the purpose of viewing or reporting on them as a group. This could be because they are for the same client or organization, satisfy the same business goal such as revenue enhancement or social need, have a common attribute such as being high-priority, or have some commonality that is relevant to the user.

Creating Project Folders

Selecting the default *All Projects* folder will cause all of your projects to be listed in the Project pane (upper right). If you have a lot of projects or projects that are very large it may take a few moments for Dashboard to refresh. New folders will always be created as a sub-folder of the currently selected folder. For better organization, folders may be nested however you wish.

The Folder Toolbar



 Create folder icon: creates a new folder under the currently selected folder

 Edit folder properties: displays the edit screen for the currently selected folder

 Delete folder: deletes the currently selected folder

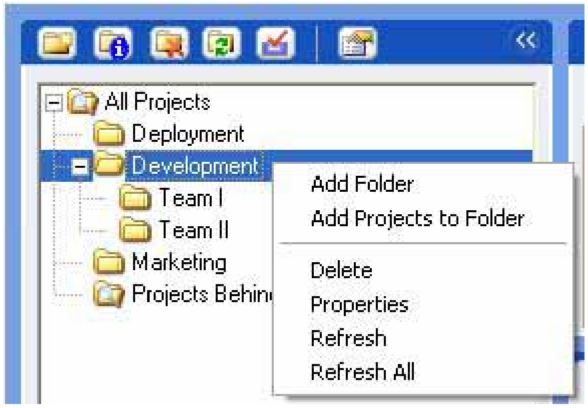
 Refresh Project list for folder: refreshes current folder and all folders which affect current folder contents

 Report Progress: displays all tasks for all projects assigned to the current Groove user in the MyTasks tab

 Allows the application settings to be edited

Creating a New Folder

Select a parent folder and click on the new folder button  OR right click on the parent folder and select the **Add Folder** option to bring up the *Create New Folder* dialog.



In the *Create New Folder* dialog type in the name for the folder and select the folder type. There are two types of folders you can choose from, *Manual* and *Search*, described below.

Manual Folders

Manual Folders contain only those projects that are manually placed into the folder.

Adding Projects to Manual Folders

Adding a project to a manual folder is done by selecting the *All Projects* folder and then dragging and dropping the desired projects directly from the *Project* pane to the destination folder in the Folders viewing area.

Removing Projects from Manual Folders

To remove a project from a folder, select the folder containing the project, right click on the project you wish to remove, and select *Remove from Folder*.

Search Folders

Search Folders are folders which will display projects based on search criteria you define.

To create a Search Folder you define a set of criteria that determine which projects are included in that folder. All projects that meet the specified criteria for the search folder and its parent folders will be included in the search folder.

In the screen shot above, the user has created a Search Folder that will display all of the projects that they are a member of that are of critical priority and behind schedule.

Nesting Folders

Manual folders are not affected by nesting with regards to which projects are displayed in the Projects pane; they always show those projects that have been manually added to the folder.

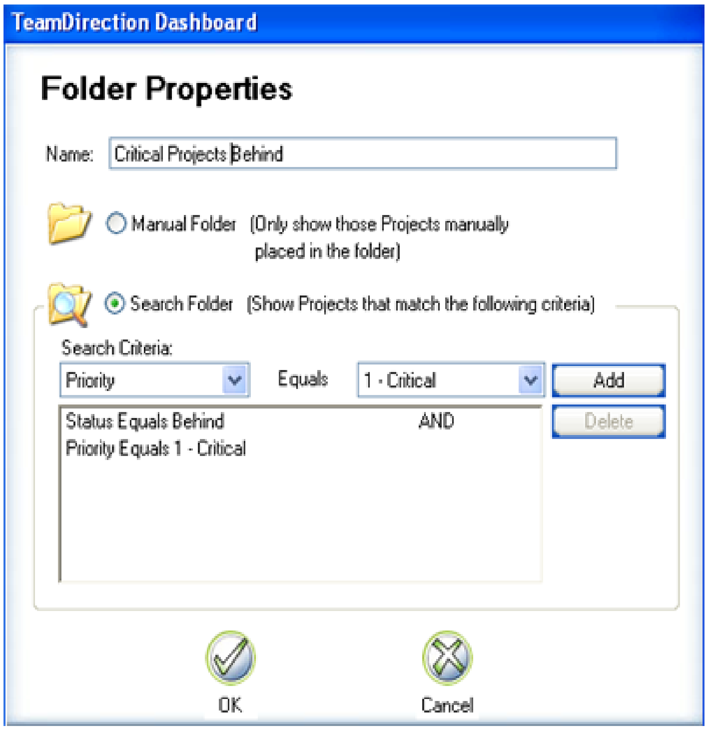
However, a Search folder will produce different results depending on what kind of parent folder it has. The effects of nesting on Search folders are as follows:

- When you create a search folder below the *All Projects* folder all available projects will be searched to find those that meet the search criteria of the folder being defined
- Nesting Search folders under other Search or Manual folders causes the subfolder to search only those projects which are in the parent folder. Each subfolder is limited to the projects in the parent folder.
- If a search folder has more then one parent Manual folder, only the closest parent folder will affect the child search folder. That is, only projects listed in the immediate parent manual folder will be searched for possible inclusion in the folder being defined.

Changing Folder Properties

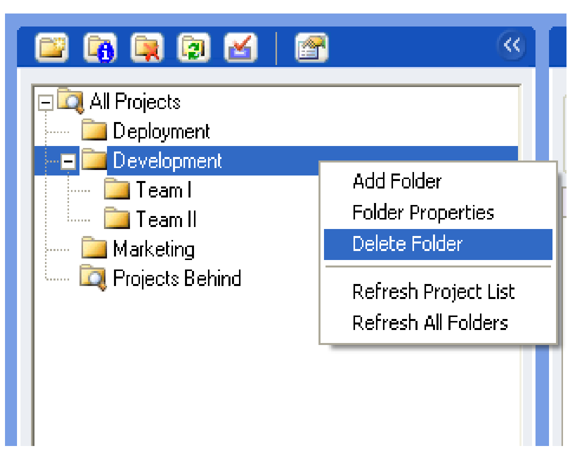
Changing Folder properties allows the folder type, name and search criteria, in the case of Search Folders, to be changed.

Folder properties can be edited at any time by selecting the folder and clicking on the Edit Selected Folder button  , or by right clicking on the folder and choosing **Folder Properties**, When finished, click the *OK* button to accept the changes.



Deleting Project Folders

To delete a folder from the folder tree, select the folder, and click on the Delete Folder  button, OR right click on the folder and select the **Delete** option.



Deleting a folder does not delete the projects that are displayed in the folder. The *All Projects* folder cannot be deleted.

Reporting Progress

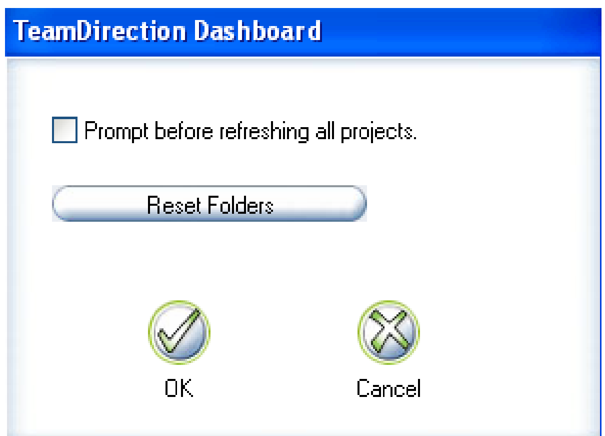
Clicking on the Report Progress button causes the following actions to occur:

1. The Folder pane is reset to *AllProjects*
2. All projects are listed and selected in the Projects pane
3. The Task pane is set to the MyTasks tab with the user's ToDo list displayed.

The result is the list of all tasks that should have been completed by now but have not been marked complete, those that should be worked on during the current period, and those that could be worked on ahead of time because their predecessor tasks are completed. This allows the user to either mark tasks complete or report progress on all of their current tasks across multiple projects.

Resetting Dashboard

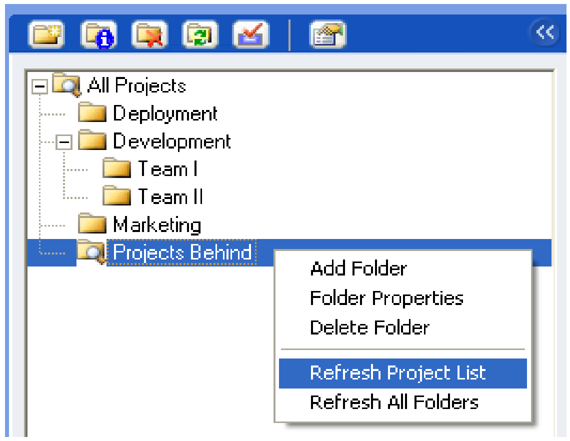
All existing folders can be reset at any time by pressing the Edit Application Settings button , and then pressing the Reset Folders button in the Reset Dialog.



The Reset Folders button removes all existing folders, except for the *All Folders* root directory, and it returns all column settings to the defaults.

Refreshing Project Folders

To avoid excessive processing time, folder contents are not automatically refreshed every time a change is made to a project. So, to ensure a given folder is displaying the appropriate projects you will need to refresh the folders on occasion. For example, if you have a Search folder with the criteria set to display all projects that are behind schedule, but one of the displayed projects is now completed, then refreshing the folder will exclude it from the display because its status is no longer behind. You can refresh a folder by selecting the given folder and clicking on the refresh icon above the folders pane, or you can use the right mouse menu by selecting a given folder and clicking the right mouse button as shown below.



As the above figure shows, there are two options when using the right mouse menu to refresh a folder. These options are **Refresh All** and **Refresh Project List**. Selecting the refresh icon performs the same functionality as selecting *Refresh Project List* from the right mouse menu.

Refresh All – This option will refresh the entire folder tree. If you have a large number of projects, selecting this option may require a long processing time to complete the process

Refresh Project List – The effect of selecting this option differs depending on the structure of your folder list. Basically, when you select this option Dashboard will refresh any folder which might affect the view of the folder you selected for refreshing. This has the following effects:

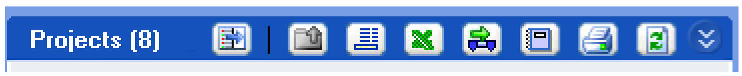
- All *Search* folders which are parent folders to the folder being refreshed will also be refreshed since the change you made to the project could affect them and thus also affect the folder you are refreshing.
- If you have a *Manual* folder as one of the parent folders then the process will not go beyond that folder.
- If there are no parent *Manual* folders to the folder being refreshed then the process will go all the way to the *All Projects* folder and have the effect of refreshing all folders in the tree.

Since *Manual* folders always display only what was placed in them by the user there is, changes to the projects do not effect what projects appear in a *Manual* folder and there is no need to refresh them.

Projects View Pane

TeamDirection Dashboard provides a powerful yet simple method of viewing and reporting on the status of all your projects in one convenient place. The Projects View pane displays a summary of all your projects that are in the currently selected folder and can be further filtered to display only the information that you need.

The Projects Pane Toolbar



Project Count: Gives the number of projects in the selected folder

 Show/Hide Project Notes: toggles between displaying and hiding the notes field

 Remove Projects: Removes the selected projects from the current folder (applies only to Manual folders).

 Discuss Project: takes you to the Groove discussion linked to this project.

 Export to Excel: exports the selected project to an MS Excel file

 Goto Project: Opens the first project of the currently selected projects

 Create Report: Creates a report for all currently selected projects

 Print Project Grid: prints out the project grid currently displayed in the *Projects* pane

 Refresh Selected Projects: refreshes the task information for the selected projects

 Displays or hides the Projects pane

Viewing Projects

The **Projects** pane defaults to showing any projects that are in the folder that you have selected. So, selecting the **All Projects folder** in the folder pane will display all projects across all of your workspaces.

Each row lists a project and its summary information. Columns are customizable and may be re-ordered, resized, hidden, unhidden and frozen. The order in which projects are displayed may be altered by sorting on a column.

- **Changing column order**
  You can reorder the columns by clicking in the column header and then dragging and dropping it to the desired position.

- **Resizing columns**
  Columns can be resized by clicking on a divider line between two columns in the column header and dragging it to the desired width. Note that the cursor may not turn into a double arrow until you click and hold down the left mouse button over the divider line.

- **Hiding / Un-hiding columns**
  To hide a column, right-click the column header and choose *Hide Column*. Unhide a column by right-clicking on any column header and choosing, *Show Column(s)…* to bring up the *Show Columns* selection window. You can then select which columns you want to show and then click OK.

- **Freezing Columns**
  Freezing a column keeps that column always in view. A frozen column is automatically moved to the far left of the Projects pane and does not move when scrolling to the other columns. You can freeze a column by right clicking on the column header and choosing *Freeze Column*. A column can be unfrozen by right clicking and choosing *Unfreeze Column*.

- **Sorting Rows**

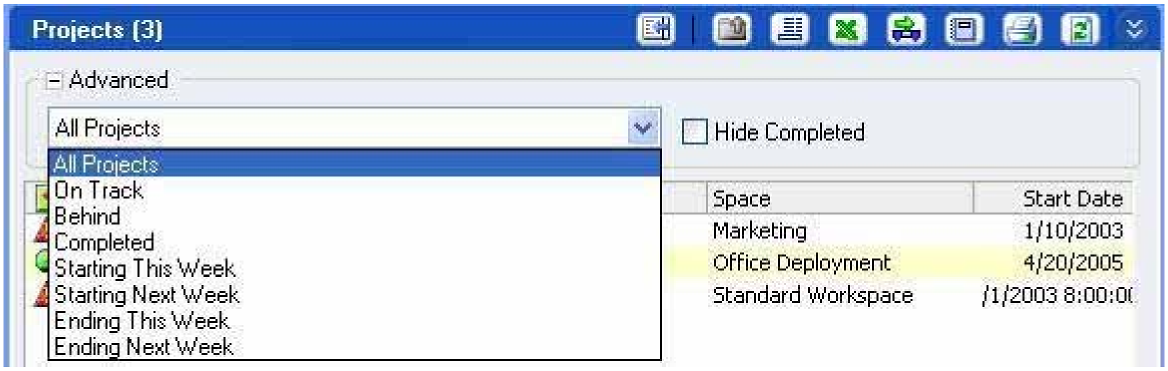
  To sort the project list in order by values in a specific column, click in that column header. To reverse the sort order, click in the column header again. The sort order is preserved, as are other user preferences.

- **Resetting Columns**
  No matter what changes you make to the information columns in the *Projects* pane, you can always restore the default settings by right-clicking any column header and selecting *Reset Columns to Default*.

Filtering the Project View

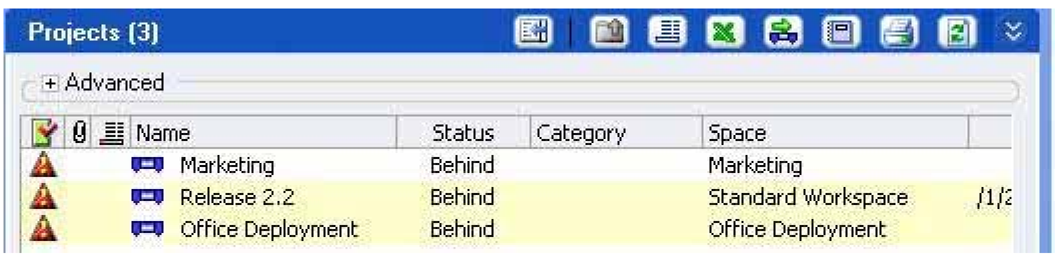
The projects in the *Projects* view pane can be filtered to show only the projects that you need to see. In the *Advanced* section at the top of the pane, you can choose the filter criteria from the drop down menu as shown below. Only projects that meet your selected criteria will be shown in the *Projects* view pane.

You can collapse or expand the *Advanced* section to increase/decrease your viewing space by clicking on the +/– symbol next to the word “Advanced”..



Selecting Projects

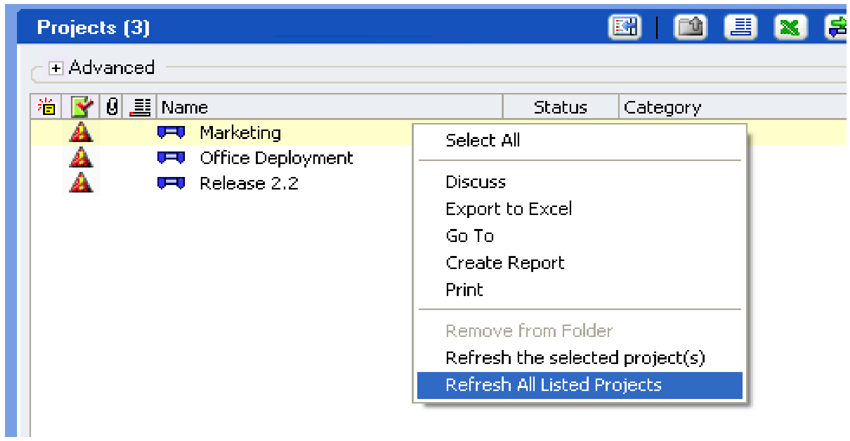
In order to print, create reports, or refresh project data, you must select one or more projects. To select a project, click on the project summary row. To select multiple projects one at a time, hold down the CTRL key on your keyboard and click the project rows that you want in your selection, or press the Shift key to select all projects up to the one you click on. Selected projects are highlighted yellow.



Refreshing the Project View

Dashboard refreshes all project and folder data when it is started. If project data changes while Dashboard is running, you will have to refresh the project data manually to see the changes. TeamDirection Dashboard does not automatically refresh the project data once the program is running.

Once you have selected one or more projects you can refresh their data by right-clicking on any project in your selection and choosing *Refresh the Selected Project(s)* from the menu. You can also choose *Refresh All Listed Projects* to refresh all of the projects that are currently visible in the *Projects* view.

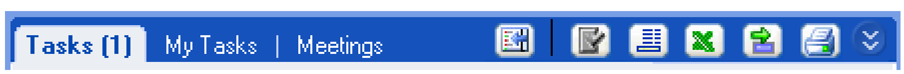


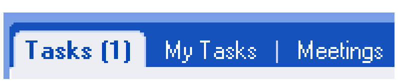
Task & Meetings Views

The *Tasks* view pane provides customizable views of all the Tasks, Milestones and Meetings for the projects selected in the *Projects* view pane. From this pane you can quickly view and update the status and progress of all of your tasks.

The Tasks/Meetings Pane Toolbar

The toolbar of the task/meetings pane allows you to easily perform many functions.





Tasks/Meetings tabs: These tabs select your view of the selected project(s) data. The number in the *Tasks* tab indicates the number of tasks in this pane

 Show/hide Task Notes: toggles between showing/hiding the task notes for the selected task

 Mark Complete: marks all selected tasks as complete

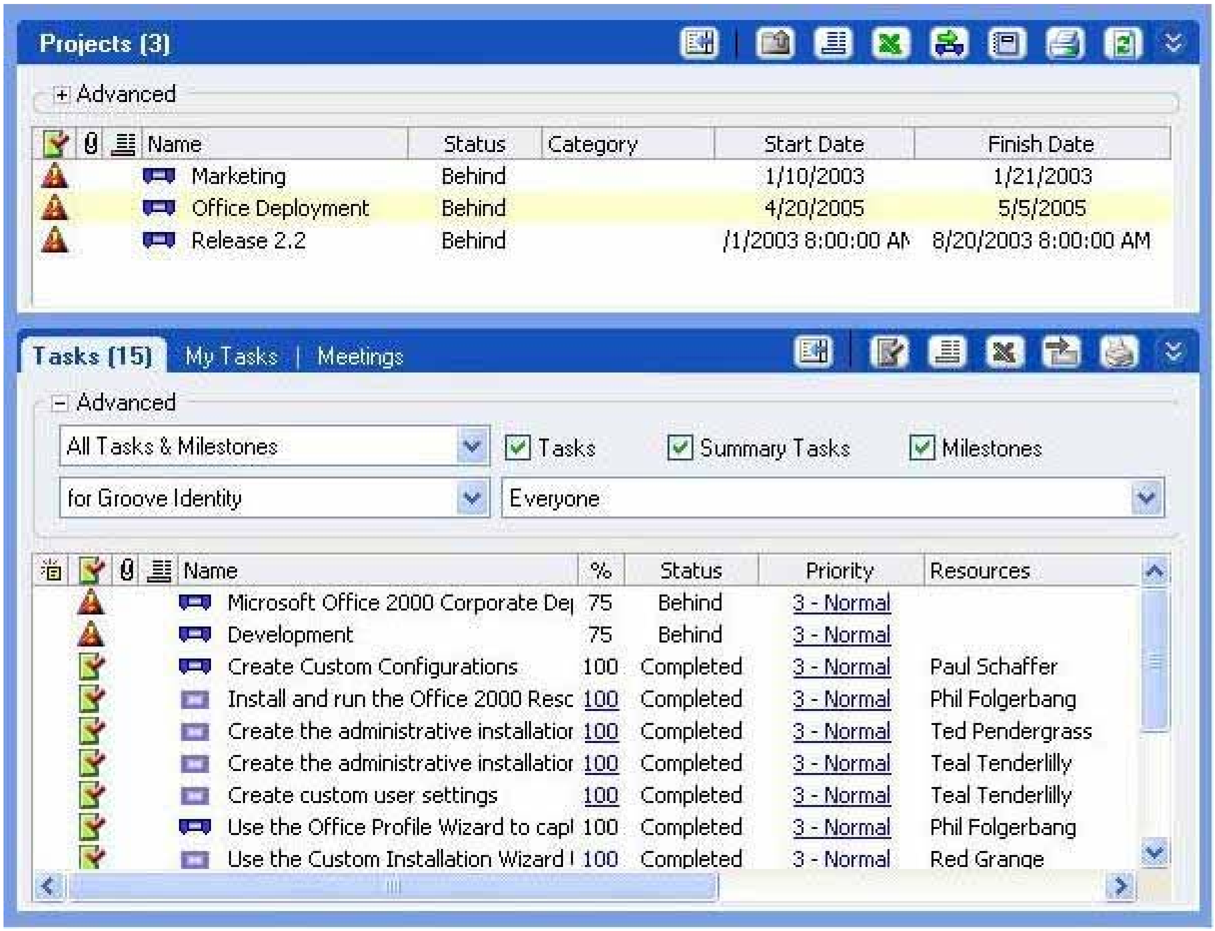
 Discuss Task: opens any Groove discussion linked to the currently selected task (the discussion must already exist).

 Export to Excel: exports the currently selected task(s) to an excel file.

 Goto Task: opens the project associated with the current task and sets the view in the project to that task

 Print Task(s): prints all tasks currently displayed in the Task pane

 Hides/displays the task pane



Both the task and project panes indicate if there is a discussion or file associated with a task or project by displaying the appropriate icon. If there is an associated discussion, the icon appears on that task or project row. If there are one or more attachments associated with a task or project, you will see the icon in the task or project row.

The Task view pane has 3 tabs:

- **Tasks** shows all tasks and milestones using your Task View Filtering options.
- **My Tasks** shows all tasks and milestones for your Groove identity.
- **Meetings** shows all meetings for the selected projects.

For each tab you can customize the view by selecting which columns to show/hide and by ordering them. This is done in the same way customizing columns works for the *Projects* view as described earlier.

Filtering Tasks

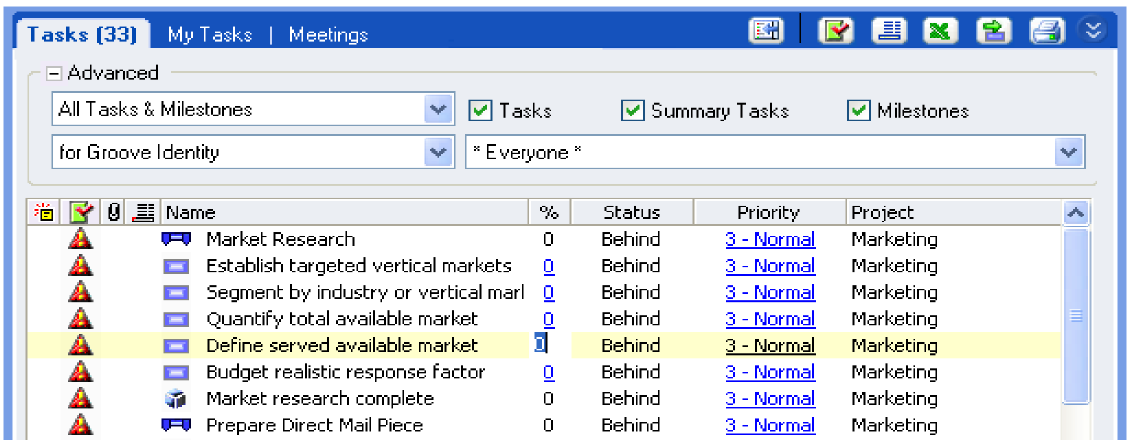
All of the tabs in the Tasks pane allow you to filter the displayed tasks in the same way that the *Projects* pane filters the displayed projects. You can select the types of tasks that you want to see with the check boxes in the *Advanced* section at the top of the *Tasks* pane as well as narrowing your displayed tasks using the three dropdown menus.

The first drop down menu filters the tasks based on status and dates. The lower two dropdown menus work together to allow you to filter the tasks based on who is currently assigned to the tasks in the *Resource* fields.

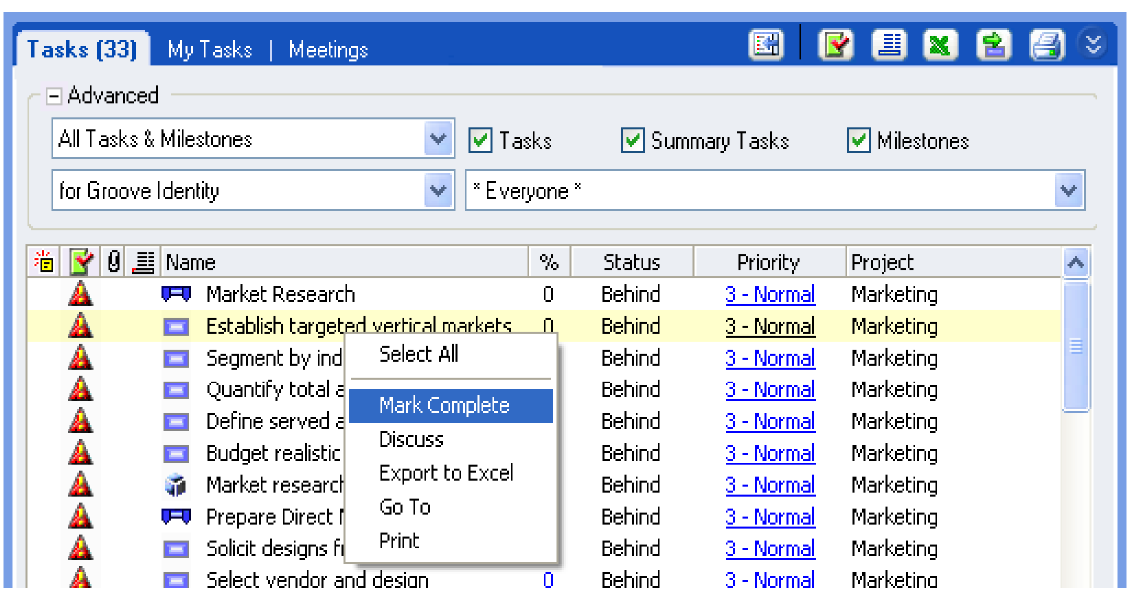
Reporting Progress

Dashboard allows users to update the percent complete and the priority for all the tasks within the *Tasks* view. Permissions are the same as for editing task information in the specific TeamDirection Project.

To edit a percentage complete for a task, click on the % field for the task and edit the value. The up and down arrows also can be used to change this field in increments.



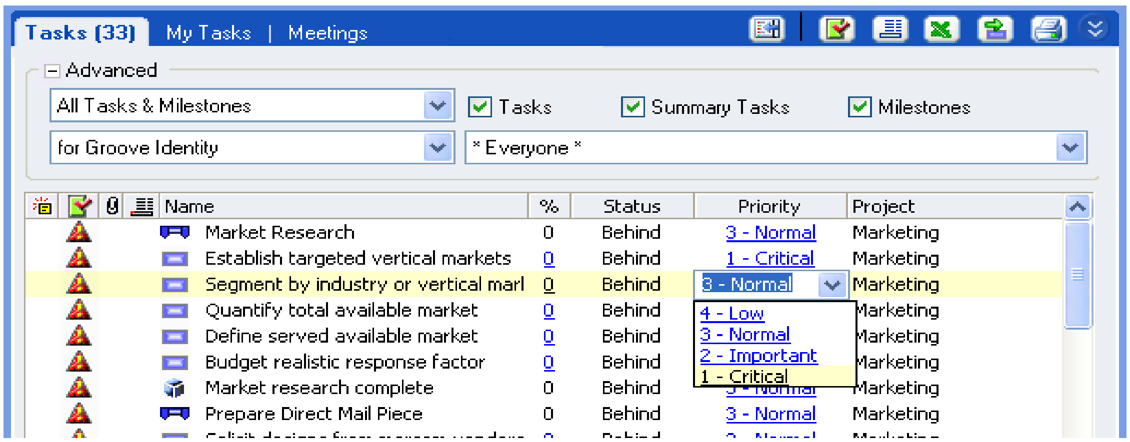
If a task is set to be marked complete, you can either select the project and press the Mark Complete  button at the top of the tasks pane, or you can right click on the task and choose *Mark Complete* from the menu as shown below.



Updating Priority

If a particular task changes in importance, a manager can change the priority of the task in Dashboard allowing the resources that are assigned to that particular task to prioritize accordingly.

To change a tasks priority, click on the priority field for the task and select the appropriate priority. Below is an example of a manager assigning a priority of Critical to a task.



Note that if the current folder is searching for Projects based on a criterion which is altered when you change these fields, changing these fields may cause the project, and thus the tasks, to no longer be shown when the folder is refreshed. For example, if the folder is set to show projects that are behind schedule and marking a task complete or updating the % complete causes the project to no longer be behind schedule, then the next time you refresh this folder, this project and its tasks will no longer be displayed here.

Reports

Reports are created based on the selected projects in the *Projects* pane. Once you select the desired projects and click on the report button you will be able to select the criteria you wish to include in the report.
To create a project report:
Select one or more projects in the *Projects* view pane.
Click on the *Create Report*  button in the *Projects* view Pane toolbar or right-click on the selected project(s) and choose the *Create Report* option.
The Report Dialog will display and allow you to select the project items and criteria for generating the report.
Once the desired criteria is selected and the report is generated, you can print the report or save the report in HTML, text, or PDF formats.

Exporting to Excel

In addition to creating reports, you can export your project or task list to an Excel file by clicking on the  icon or by using the right mouse button menu and selecting *Export to Excel*. Only the tasks or projects currently selected will be exported. To export a list of projects or tasks do the following:

1. Select the projects/tasks you wish to export. To select all items in the list click the right mouse button in the list and select the menu option *Select All*
2. Click the Export to Excel icon or, using the right mouse button, click in the list and select *Export to Excel*
3. If you wish to export to an existing Excel file click on the *Use Existing Excel File* option and select the file and worksheet you wish to export to. To use a new worksheet simply type in the name you wish to use for the worksheet and it will be created in the file
4. Once the export is done the file will open for you to check the results. You must save the file to keep the changes. Closing the file without saving will cause the exported data to be lost.
5. Click OK to the message indicating that the export is complete.

Note that any sort order which has been set for the task rows in the user interface will be reflected in the Excel file.