

## Getting Started With TeamDirection Project

### If you receive an e-mail invitation

You are being invited to a project that has been shared on a SharePoint site. To join, you must first have the software installed. If you do not already have it, go to [TeamDirection Project for SharePoint](http://www.teamdirection.com) (www.teamdirection.com and click Try It Now) for a free 15-day trial.

Once you have the software installed, click on the project link in the e-mail message. This will launch the Project Organizer, where the projects you participate in will be listed and new ones can be created. The Project Viewer will also open, showing the details of the specific project to which you have been invited.

### If you are creating a new project

Make sure you have the software installed, then follow these 3 easy steps



1. [Create a project plan](#)
2. [Connect to people and information](#)
3. [Assign resources to tasks](#)

#### 1. Creating a Project Plan


When you install the TeamDirection software for the first time, you see an empty Project Organizer. There are three ways to create a new project:

- a. Build the plan manually by typing task information into the task grid
- b. Import a Microsoft Project
- c. Import a TeamDirection archive file provided by someone else

##### a. Building the Plan Manually

Clicking  [Create a Project](#) will cause the Project Viewer to open, showing an empty project. Give your project a name by typing over the Untitled Project text, and add any number of tasks by typing their names (descriptions) into the grid. Use the Indent icon  to create sub-tasks under a summary task.

To assign workspace members, see Connecting to People and Information below.

If you want each of your team members to develop their own part of the plan, create a number of summary tasks each with a single sub-task. Share (click  on the menu bar) the plan on SharePoint and then assign a workspace member

to each summary task that you want developed further. Each summary task assignee will have permissions to add, edit and delete the sub-tasks comprising their summary task.


### **b. Importing a Microsoft Project**

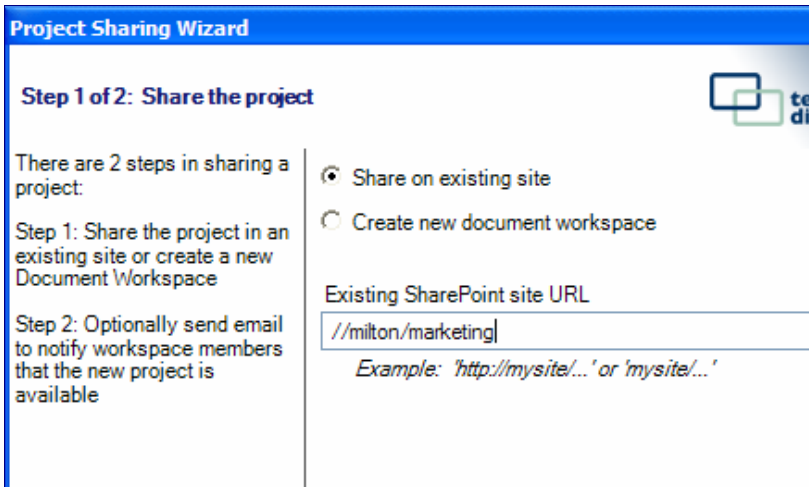
If you are a Microsoft Project user, you can populate your new project by importing an mpp file. Select File on the menu bar of the Project Organizer, then Import, and then browse to your mpp file. A new TeamDirection project will be created with the same name and tasks as your MS project.

### **c. Importing a TeamDirection archive file**

If someone has sent you a file to use as a template, use the Import option on the File menu bar to browse to the file location, then specify the project name and start date for the new project. you are creating.

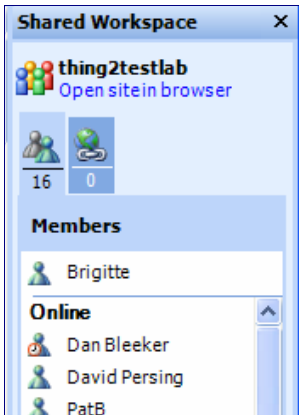
## **2. Connecting to People and Information**

To collaborate with your team members and assign them to tasks, you must share the project on SharePoint first. Click on the Share icon  and name the SharePoint site where you want to work together. This may be internal to your company or an external site.




### **The Member Pane – Connecting to People**

Once the project has been successfully shared, any existing workspace members will appear in the Member Pane to the right of the Gantt chart. You can see the status of your teammates and send messages to quickly resolve issues.

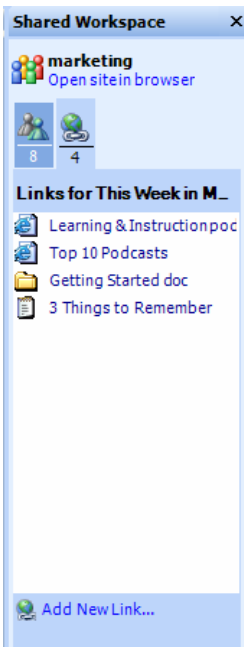


To send an Instant Message to any online member, click on their name once. For other options such as sending email, hover over the name with your mouse until a dropdown arrow appears to the right. You will be presented with several choices as well as seeing useful information such as whether the person has visited the project or not.

 You must be signed into Windows Messenger to send Instant Messages. If you see this icon in your System tray, it means you are not signed in.

### Links – Connecting to Information

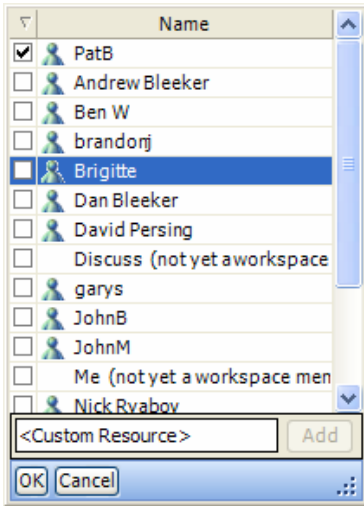
It's easy to include links to important information for your project, either at the project level or specific to any task. Just use the Add Link dialog accessed at the bottom of the Member Pane. The links can be anywhere that people have access to, including the Internet, your SharePoint site, or directories on your network. They will appear in your Links pane which is accessed by clicking on the Links tab next to the Members tab.



In addition to the items you create links to in the project tool, you can put important information in the Document Workspace associated with your project on the SharePoint site.

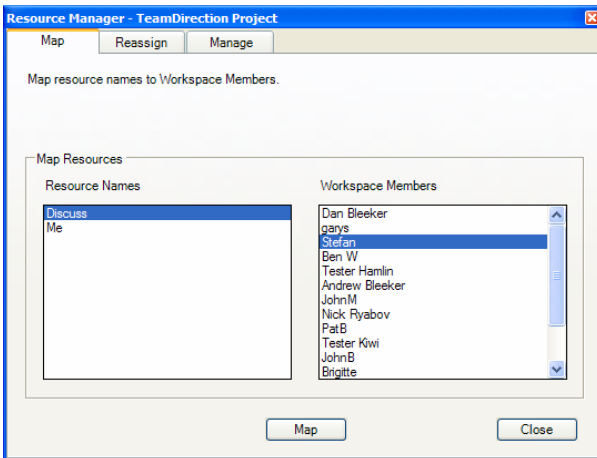
### 3. Assigning Resources to Tasks

Assign workspace members to tasks by clicking in the Assigned column and checking the member name(s) of those being assigned to a task or milestone.

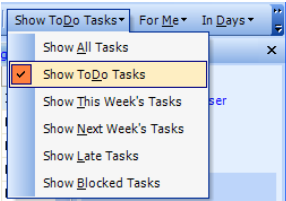


If there were resource names in the MS Project file you imported, or if you created custom resource names in the drop down box associated with the Assigned column before inviting people, then these names need to be associated with workspace members in order for them to see their assigned tasks.

To associate workspace members with Assignee names, go to Tools on the menu and select Manage Resources. Using the tab entitled Map, select the Resource Name on the left, then select the Workspace Member on the right that those tasks are being assigned to, then click Map. In the example, tasks assigned to "Discuss" are being assigned to the workspace member Stefan.

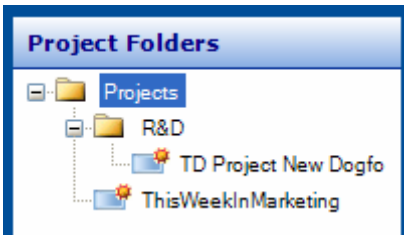


Mapping resources to workspace members ensures that they will see all of their assigned tasks when they filter on "Show ToDo Tasks" from the menu bar. Showing ToDo tasks allows you to focus on the work that is due soon or already overdue.



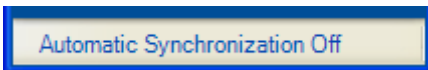
## Synchronization

Once your team members have opened the project and started reporting progress, you will be able to see Unread Markers next to the project whenever information changes, provided that you are synchronizing your projects with the SharePoint versions either manually or using automatic synchronization.

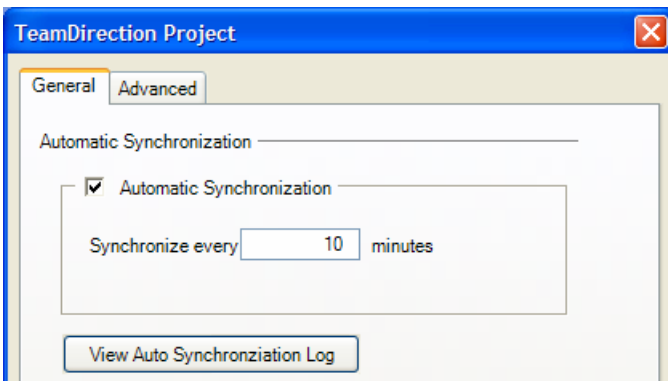


By default, automatic synchronization is turned off when you first install TeamDirection Project.

To turn it on, click the Automatic Synchronization Off link at the bottom of the Project Organizer.

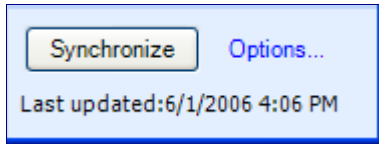


You will be taken to the Tools | Options dialog where you can turn it on and specify how often you would like automatic synchronization to occur.



Automatic synchronization only occurs for closed projects, stopping while a specific project is open, and resuming for that project once it is closed again.

You may also synchronize manually from within a project to disseminate your changes such as new task assignments or reporting progress. To do this, click the Synchronize button in the lower right of the Member pane.



While you may not have made changes, you may also synchronize to get updates from your team members earlier than the automatic synchronization is scheduled to deliver them. To do this, click the Synchronize button at the bottom of the Member pane.

If you are using a hosted site or even an internal site where you will be challenged for your authentication credentials each time you open the application, it may be best to Synchronize manually whenever you have made changes or which to get updates from the rest of your team. Otherwise, if automatic synchronization is turned on for these sites, you may be prompted for your credentials every time TeamDirection Project tries to access SharePoint.

## Permissions

Permissions are hierarchical. If someone is assigned to a summary task, then he is able to add, edit and delete tasks within the scope of that summary task. Individuals who have been assigned sub-tasks may only edit and report progress on their own tasks. If someone is added to the Assigned column for the project, they can add, edit and delete anything in the project.

## More Questions?

Check our monitored [Forum](#) to see if your issue has already been addressed for someone else. If not, feel free to enter a question there or contact us at [support@teamdirection.com](mailto:support@teamdirection.com)