

## Task Manager for PPM

There are two ways to create and update task plans with PPM – with the web server under the Projects application, or with the desktop client application called Task Manager. The client application has more features that make it easier to create new plans. With the Task Manager you can work on local plans or server plans.

### How to Download Task Manager from TeamDynamix

To download TD's Task Manager, you need to follow these steps.

**Step 1:** Go to <http://teamdynamixhe.com> and click on the COMMUNITY link.



**Step 2:** At the PPM COMMUNITY page, create your TD Community account by clicking on **Register Now**.



**Step 3:** You will get your TD Community credentials by email. Then return to the site, click on COMMUNITY, and sign in.



Step 4: Next, click on the featured download link **Task Manager**.

**TeamDynamix<sup>HE</sup>** The Leader in Higher Education Project and Portfolio Management (PPM) Software Sign In

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-  **Task Manager**  
Task Manager is a free, powerful desktop application you can use to quickly and easily create and manage task plans. If you are a TeamDynamix user, this tool will synchronize seamlessly with TeamDynamix.

Step 5: Before downloading Task Manager, watch the video for help on using this desktop client application.

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## Task Manager

Task Manager is a powerful new desktop application which operates as a stand-alone application, but integrates seamlessly with TeamDynamix Enterprise applications. Use Task Manager to create, update and manage plans and tasks offline. When you're finished, upload your plan into TeamDynamix or save it to your computer. A free, intuitive and easy-to-use alternative to Microsoft® Project™.

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**Downloads:**

-  **Task Manager Professional Edition** 1.6.2.1

**Related Media:**

-  Task Manager Overview

**Institutions Using Task Manager:**

- McGill University
- Franklin University
- The Ohio State University-Fisher COB
- Columbus State Community College
- University of New Hampshire
- University of Colorado at Boulder
- Carnegie Mellon University
- University of Texas San Antonio

**Video Player:** 00:00 / 00:00

**Step 6:** It is important that you are signed in to TD's PPM Community, otherwise you will not be presented with the correct edition of the Task Manager. Click on the download link of the **Task Manager Professional Edition**.

The screenshot shows the TeamDynamix website interface. At the top, the logo 'TeamDynamix<sup>HE</sup>' is displayed with the tagline 'The Leader in Higher Education Project and Portfolio Management (PPM) Software'. The user is logged in as 'Hello, Kathy Wilmot!' with links for 'My Profile' and 'Sign Out'. The navigation menu includes 'HOME', 'VIDEOS', 'COLUMNS', 'EVENTS', 'DOWNLOADS' (highlighted), and 'FORUMS'. The main content area is titled 'Task Manager' and includes a descriptive paragraph: 'Task Manager is a powerful new desktop application which operates as a stand-alone application, but integrates seamlessly with TeamDynamix Enterprise applications. Use Task Manager to create, update and manage plans and tasks offline. When you're finished, upload your plan into TeamDynamix or save it to your computer. A free, intuitive and easy-to-use alternative to Microsoft® Project™.' Below the text is a video player showing a screenshot of the Task Manager software interface. To the right, there are social media share buttons and a 'Downloads:' section with a red arrow pointing to the 'Task Manager Professional Edition' download link (version 1.6.2.1). Below that is a 'Related Media:' section with a link to 'Task Manager Overview'. At the bottom right, there is a list of 'Institutions Using Task Manager:' including McGill University, Franklin University, The Ohio State University-Fisher COB, Columbus State Community College, University of New Hampshire, University of Colorado at Boulder, and Carnegie Mellon University.

**Step 7:** Follow the instructions provided by TD for installing. Once installed, open the Task Manager by clicking on the desktop icon.



**Step 8:** You will be asked to register/activate Task Manager. This only needs to be done once and then you will receive notifications when updates are available. For this one time only, use your TD PPM Community credentials (not your McGill credentials).

The screenshot shows a dialog box titled 'TD Activate Now' with the 'TeamDynamix<sup>HE</sup> Activation' window. The text inside reads: 'Enter your TeamDynamix Downloads username and password in the fields below and click OK to log in. This is the username and password you used to originally download this software and may be different from your TDProjects username and password if you are a TDProjects user. Don't have an account? [Register now](#)'. There are two input fields: 'E-Mail Address' and 'Password'. A link '[Forgot your Password?](#)' is next to the password field. At the bottom, there is a 'Connection Settings...' link and 'OK' and 'Cancel' buttons.

**Step 9:** When prompted, enter the URL for McGill's PPM server. You can also find this field under the Task Manager Tools > Options:

TD Options

Prompt when discarding unsaved changes  
 Confirm deletion of tasks  
 Start parent tasks expanded  
 Automatically check out plans when opening from TeamDynamix  
 Do not display optional updates (Not recommended)

TDProjects URL  ?

Proxy Server  ?

Default Lag  (in days) ?

Hours per Day

Workdays per Week

This software keeps a list of recently used plans.

## Notes:

1. To access server plans, or save local plans to the server, you will be prompted to use your McGill credentials to connect to the server.
2. You will need to **check out** server plans before you can edit.
3. You should always add resources to the project before adding them to tasks in the plan. The project is accessed on the server under the Projects application > Management.