## **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**.

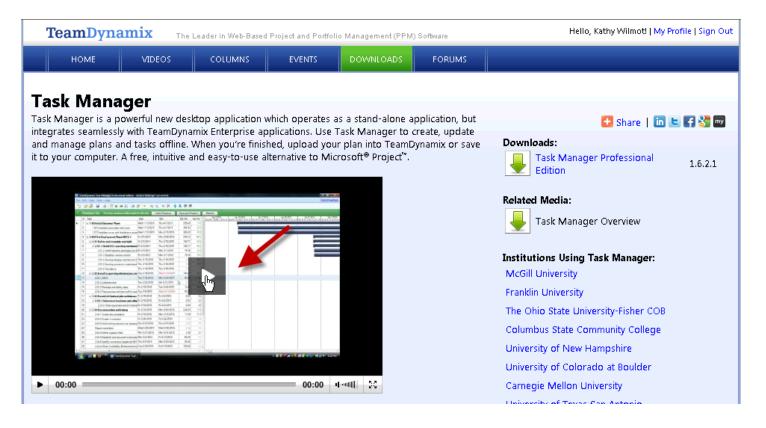


Step 3: You will get your TD Community credentials by email. Then return to the site, click on COMMUNITY, and sign in.





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



**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**.

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**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).

TD Activate Now	×						
TeamDynamix <sup>##</sup>	Activation						
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? <u>Register now</u>							
E-Mail Address							
Password	Forgot your Password?						
Connection Settings	OK Cancel						

**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									
<ul> <li>Prompt when discarding unsaved changes</li> <li>Confirm deletion of tasks</li> <li>Start parent tasks expanded</li> <li>Automatically check out plans when opening from TeamDynamix</li> <li>Do not display optional updates (Not recommended)</li> </ul>									
TDProjects URL	https://ppm.mcgill.ca/TDNext/	0							
Proxy Server		0							
Default Lag	1 (in days)	0							
Hours per Day	8								
Workdays per Week	5								
This software keeps a Clear Recent Plans	list of recently used plans.	el							

## 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.