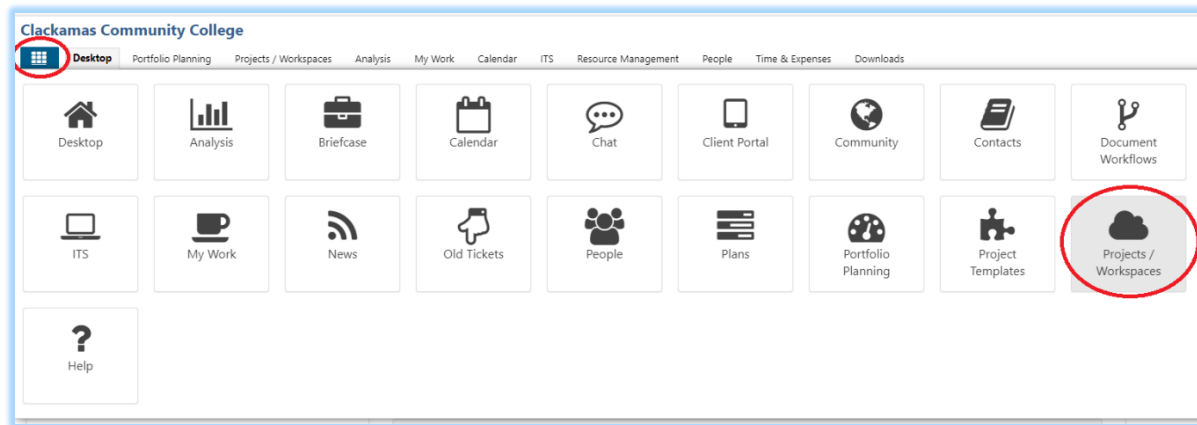
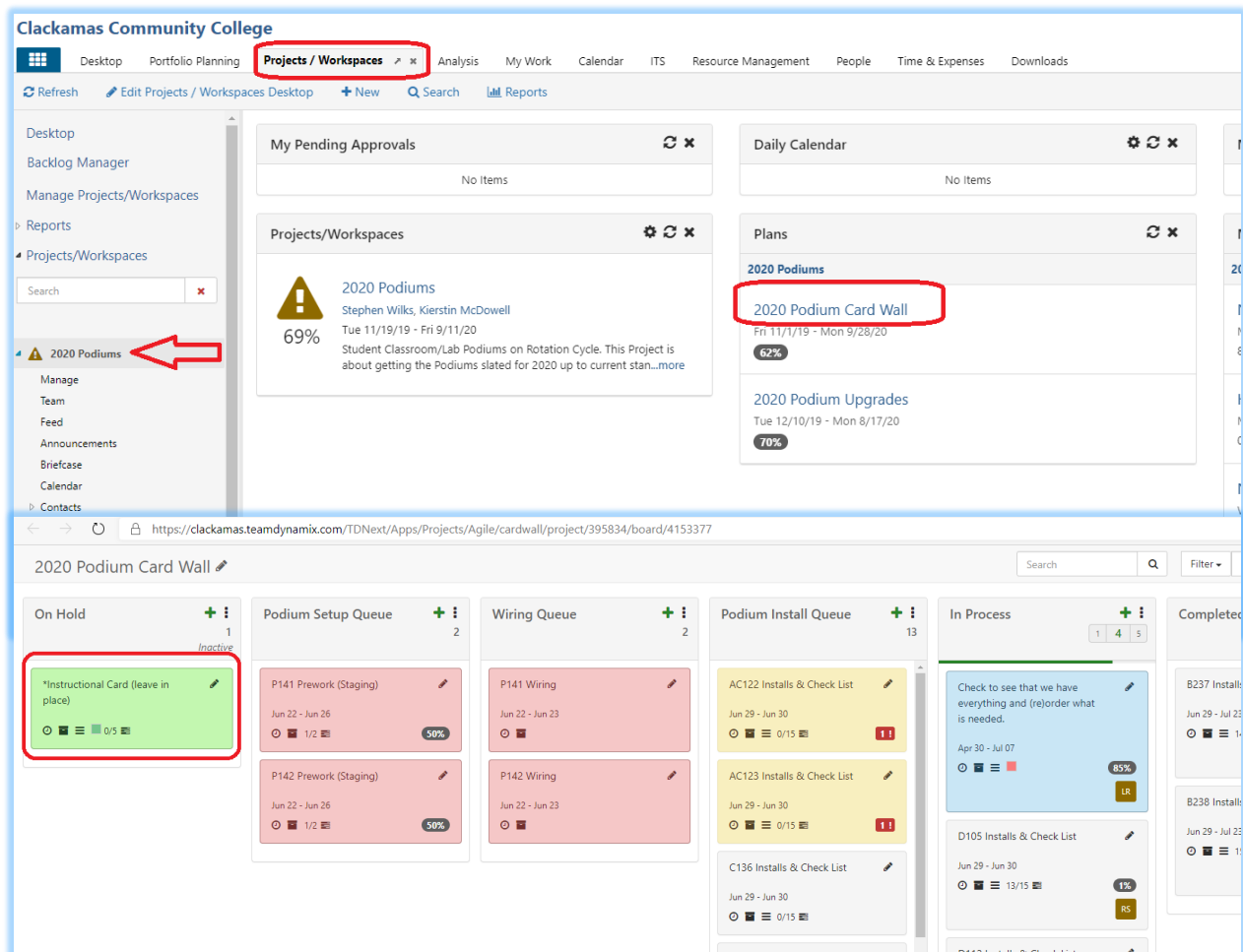


Log on to <https://clackamas.teamdynamix.com/> and select “Users”. If you don’t already have the “Projects / Workspaces” tab. Select the Menu select button and if it is available “Projects / Workspaces”. (If not available, contact Kierstin for help.)



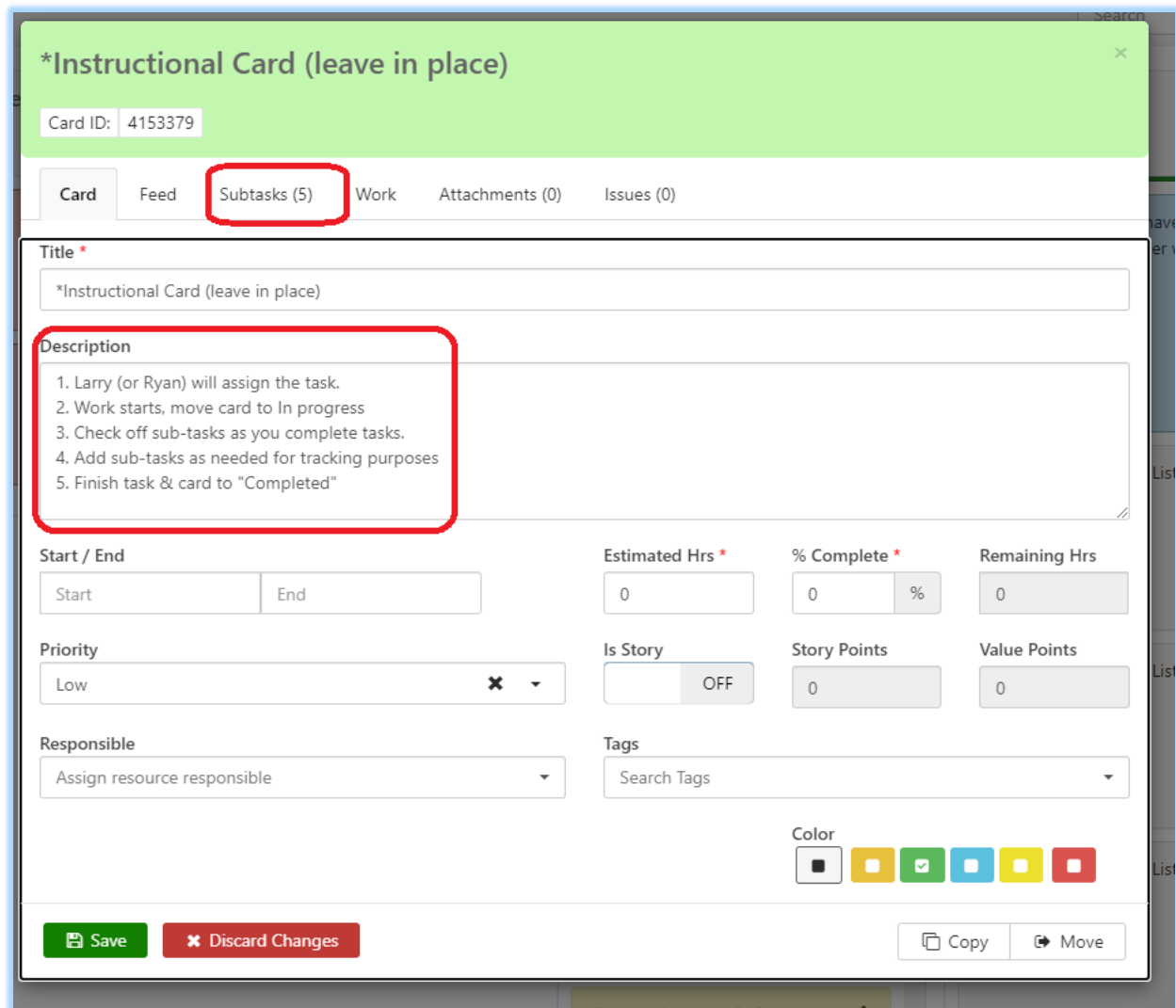
1. Select the “Projects / Workspaces” menu/tab.

2. Select the Project Plan you are interested in. That will bring up a card wall that looks similar to but different to my example using the 2020 Podium Card Wall.



The screenshot displays the Clackamas Community College TeamDynamix interface. The top navigation bar includes 'Desktop', 'Portfolio Planning', 'Projects / Workspaces' (highlighted with a red box), 'Analysis', 'My Work', 'Calendar', 'ITS', 'Resource Management', 'People', 'Time & Expenses', and 'Downloads'. The left sidebar shows 'Desktop', 'Backlog Manager', 'Manage Projects/Workspaces', 'Reports', and 'Projects/Workspaces' (selected). A red arrow points to the '2020 Podiums' link in the sidebar. The main content area shows 'My Pending Approvals' (No Items), 'Daily Calendar' (No Items), and 'Plans'. The 'Plans' section lists '2020 Podiums' (62% complete) and '2020 Podium Upgrades' (70% complete). The '2020 Podium Card Wall' is highlighted with a red box. Below the plans, the '2020 Podium Card Wall' is displayed as a Kanban board with columns: 'On Hold' (1 item), 'Podium Setup Queue' (2 items), 'Wiring Queue' (2 items), 'Podium Install Queue' (13 items), 'In Process' (5 items), and 'Completed'. The 'On Hold' column contains an 'Instructional Card (leave in place)' highlighted with a red box. The 'Podium Setup Queue' column contains two items: 'P141 Prework (Staging)' and 'P142 Prework (Staging)', both at 50% completion. The 'Wiring Queue' column contains two items: 'P141 Wiring' and 'P142 Wiring', both at 50% completion. The 'Podium Install Queue' column contains three items: 'AC122 Installs & Check List', 'AC123 Installs & Check List', and 'C136 Installs & Check List', all at 0/15 completion. The 'In Process' column contains two items: 'Check to see that we have everything and (re)order what is needed.' (85% complete) and 'D105 Installs & Check List' (1% complete). The 'Completed' column contains two items: 'B237 Installs' and 'B238 Installs', both at 100% completion.

3. You are now in the Card Wall. Some planners will add a card like the green card called “*Instructional Card” to see reminders as to how this specific Card Wall is being used.
 - a. (Note, this card has 5 subtasks, not to be confused with the 5 items listed in the description on this page.)



***Instructional Card (leave in place)**

Card ID: 4153379

Card | Feed | **Subtasks (5)** | Work | Attachments (0) | Issues (0)

Title *

*Instructional Card (leave in place)

Description

1. Larry (or Ryan) will assign the task.
2. Work starts, move card to In progress
3. Check off sub-tasks as you complete tasks.
4. Add sub-tasks as needed for tracking purposes
5. Finish task & card to "Completed"

Start / End

Start | End

Estimated Hrs * 0

% Complete * 0 %

Remaining Hrs 0

Priority Low

Is Story OFF

Story Points 0

Value Points 0

Responsible Assign resource responsible

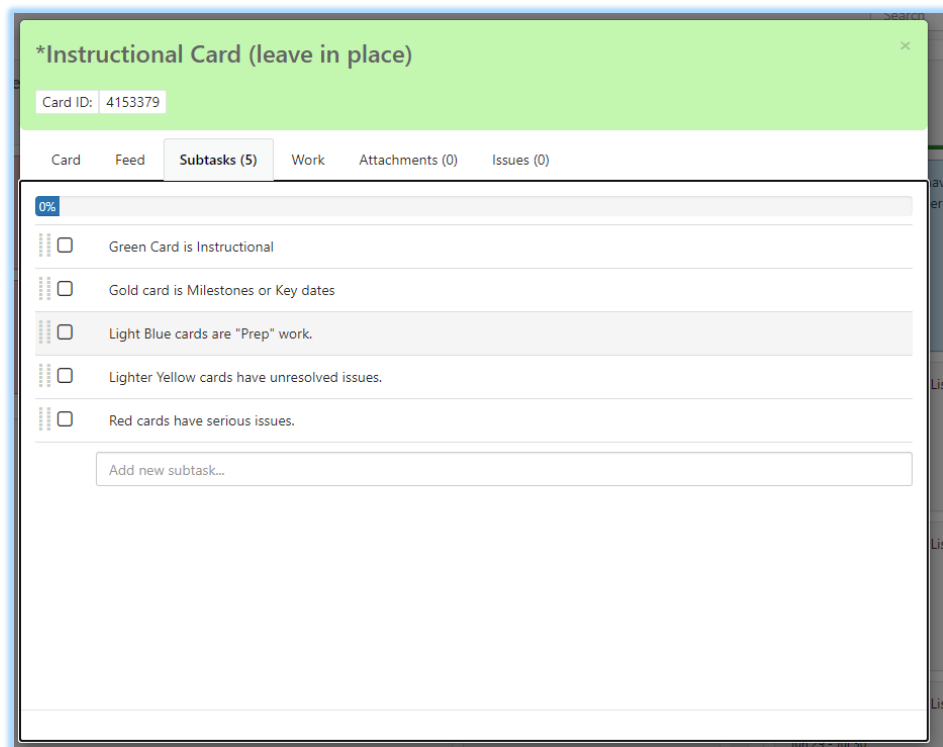
Tags Search Tags

Color

Save Discard Changes Copy Move

Some planners will use Subtask as a legend for how to use this card wall

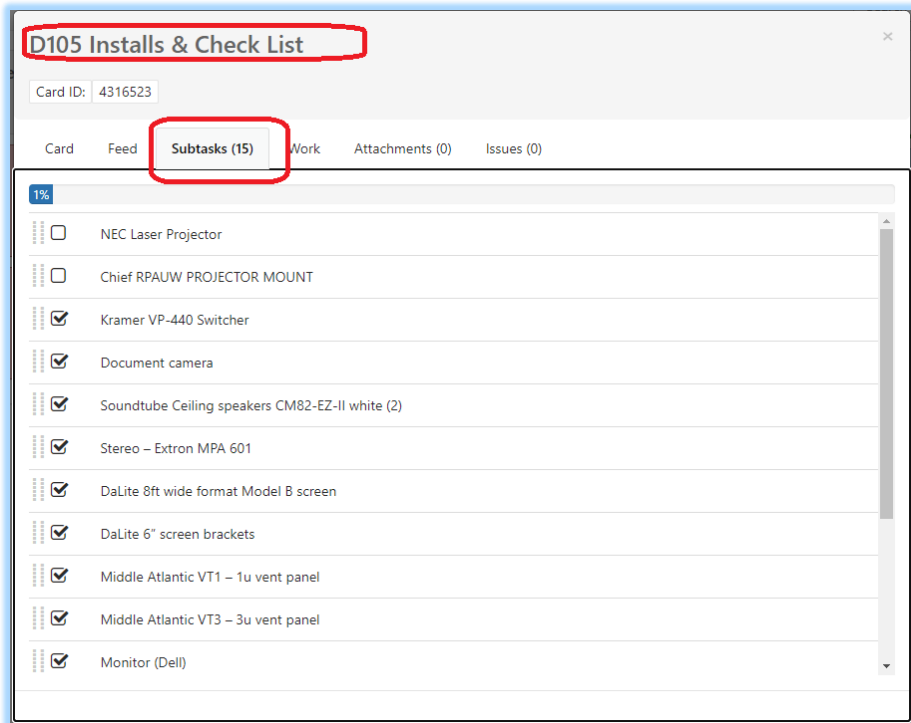
- Usually the subtasks will be steps included in this task, for example here you can see that “NEC Laser Projector” & “Chief RPAUW PROJECTOR MOUNT” have not yet been checked off. Your project plan will more likely have subtasks, like Build app, test app, promote app to production.



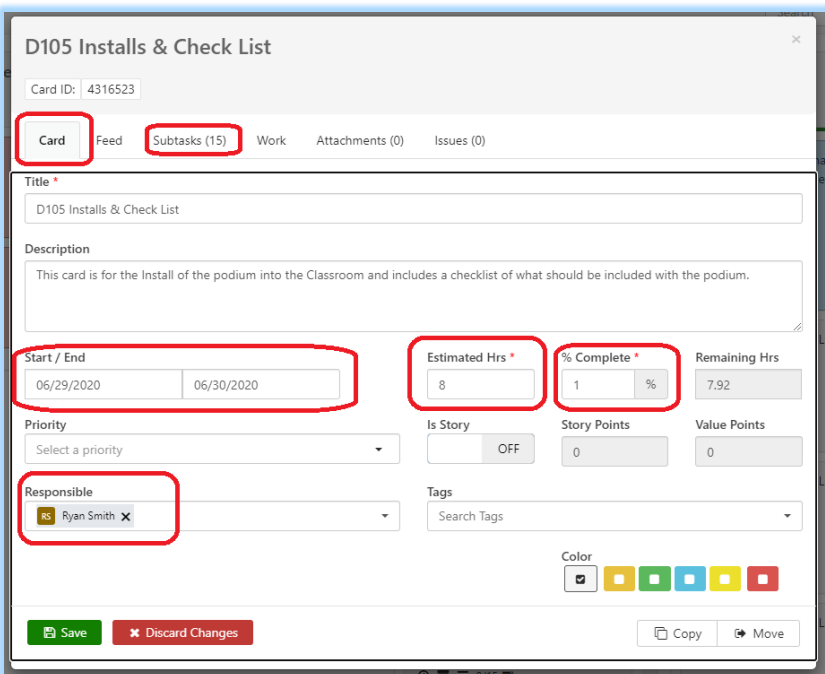
The screenshot shows a web interface for a project card wall. At the top, a green header bar contains the text "*Instructional Card (leave in place)" and a close button. Below this, a white bar displays "Card ID: 4153379". A navigation menu includes tabs for "Card", "Feed", "Subtasks (5)", "Work", "Attachments (0)", and "Issues (0)". The "Subtasks (5)" tab is active, showing a progress bar at 0% and a list of five subtasks, each with an unchecked checkbox:

- ☐ Green Card is Instructional
- ☐ Gold card is Milestones or Key dates
- ☐ Light Blue cards are "Prep" work.
- ☐ Lighter Yellow cards have unresolved issues.
- ☐ Red cards have serious issues.

Below the list is a text input field labeled "Add new subtask...".



5. Going back to the “Card” tab, we see that this task had a Start / End of 6/29-6/30/2020. This when the work was “scheduled”. For our purposes 6/29/2020 was simply a place holder as due to COVID-19 we did not have to reserve the rooms as normal. You or your planner may change the start and end dates as needed as well as the estimated hours, etc.
 - a. Note that this task shows assigned to Ryan Smith. You can have more than one person assigned to a task, but we want who ever is doing the work here and you will see why on the “Work” Tab.
6. If you are assigned task to work on and the “Responsible” has not yet been updated please

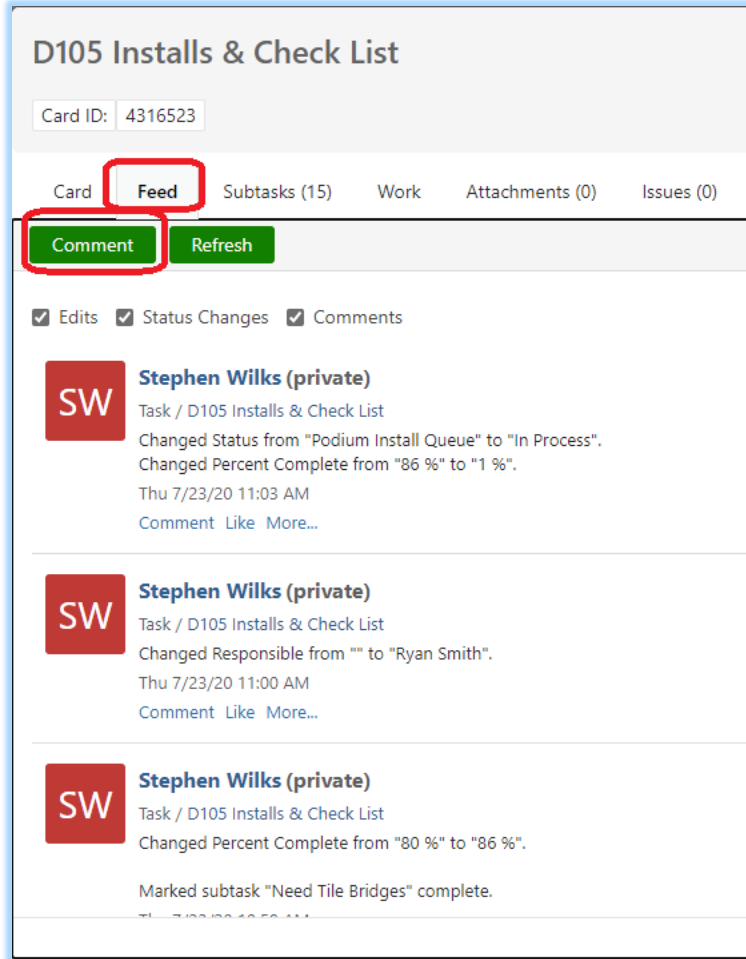


update it with who ever is assigned that task. Who ever is assigned will be responsible for checking off the subtasks as the are completed. This allows someone else to take over where the last person finished without a lot of guessing.

7. In addition to the check list, there is a “Feed” button. From the feed button you can see who changed what and if anyone added comments.

a. It is highly recommended to leave comments for any issues, concerns or just notes that you may want included with this task a reference.

- b. Note also that you can filter out Edits, Status Changes, and Comments. By unchecking those boxes and hitting refresh.



D105 Installs & Check List

Card ID: 4316523

Card **Feed** Subtasks (15) Work Attachments (0) Issues (0)

Comment Refresh

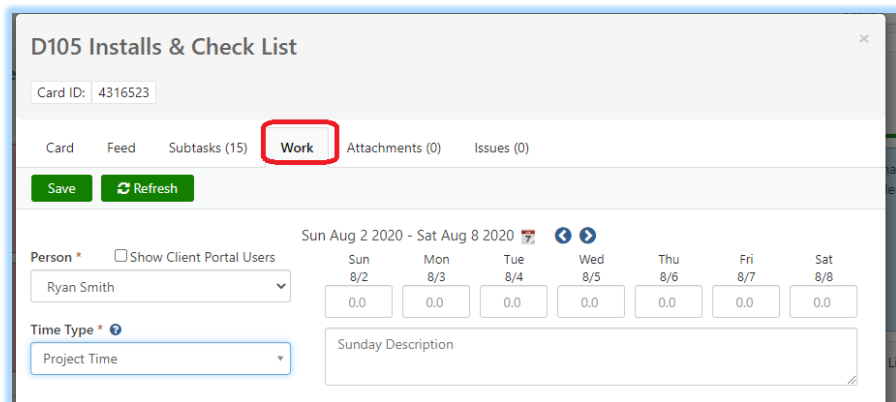
☒ Edits ☒ Status Changes ☒ Comments

SW **Stephen Wilks (private)**
 Task / D105 Installs & Check List
 Changed Status from "Podium Install Queue" to "In Process".
 Changed Percent Complete from "86 %" to "1 %".
 Thu 7/23/20 11:03 AM
[Comment](#) [Like](#) [More...](#)

SW **Stephen Wilks (private)**
 Task / D105 Installs & Check List
 Changed Responsible from "" to "Ryan Smith".
 Thu 7/23/20 11:00 AM
[Comment](#) [Like](#) [More...](#)

SW **Stephen Wilks (private)**
 Task / D105 Installs & Check List
 Changed Percent Complete from "80 %" to "86 %".
 Marked subtask "Need Tile Bridges" complete.

8. If your project is tracking hours for project time, select the "work" menu to enter your daily hours.



D105 Installs & Check List

Card ID: 4316523

Card Feed Subtasks (15) **Work** Attachments (0) Issues (0)

Save **Refresh**

Sun Aug 2 2020 - Sat Aug 8 2020

Person * ☐ Show Client Portal Users
 Ryan Smith

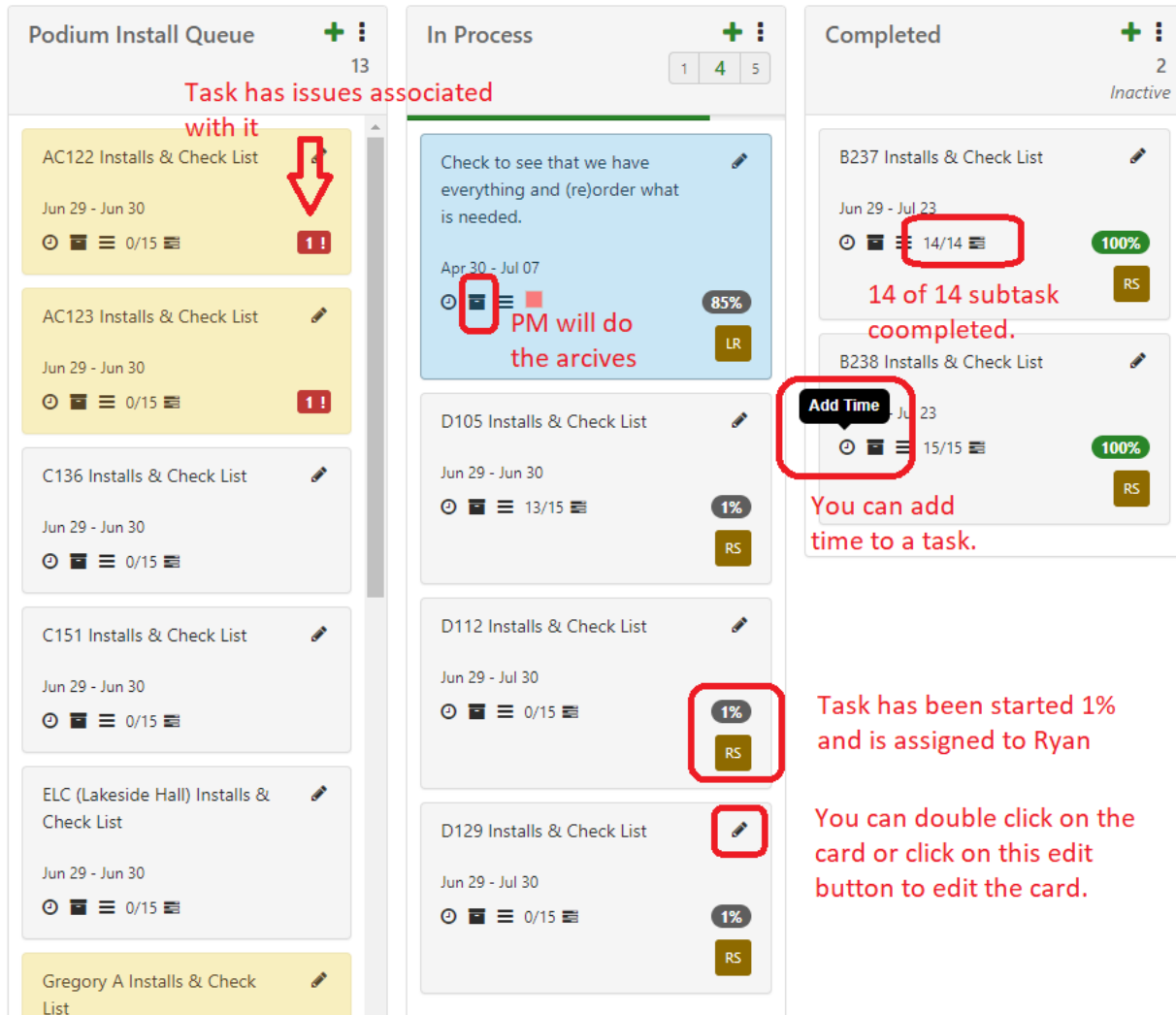
Time Type * ☐
 Project Time

Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6	Fri 8/7	Sat 8/8
0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sunday Description

9. When you take on a task, move the card to the "In Process" list. This will change the percent complete to %1, showing that the task has started. When the task is complete, move it to the "Completed" list. Moving a task to completed will change it to 100% complete, but it will not check off the subtasks for you.
10. Remember to check off the subtask when they are complete as this may be how someone else picks up the task if you get reassign, to busy to complete the task, etc.

11. Here is a summary or quick reference.



Podium Install Queue + 13

Task has issues associated with it

AC122 Installs & Check List
Jun 29 - Jun 30
0/15 1!

AC123 Installs & Check List
Jun 29 - Jun 30
0/15 1!

C136 Installs & Check List
Jun 29 - Jun 30
0/15

C151 Installs & Check List
Jun 29 - Jun 30
0/15

ELC (Lakeside Hall) Installs & Check List
Jun 29 - Jun 30
0/15

Gregory A Installs & Check List

In Process + 4 5

Check to see that we have everything and (re)order what is needed.
Apr 30 - Jul 07
85% LR

D105 Installs & Check List
Jun 29 - Jun 30
13/15 1% RS

D112 Installs & Check List
Jun 29 - Jul 30
0/15 1% RS

D129 Installs & Check List
Jun 29 - Jul 30
0/15 1% RS

Completed + 2 Inactive

B237 Installs & Check List
Jun 29 - Jul 23
14/14 100% RS

14 of 14 subtask coompleted.

B238 Installs & Check List
Jul 23
15/15 100% RS

Add Time

You can add time to a task.

Task has been started 1% and is assigned to Ryan

You can double click on the card or click on this edit button to edit the card.

Thank you for your attention to this process.

Stephen Wilks, PMP
Enterprise Project Management Specialist.