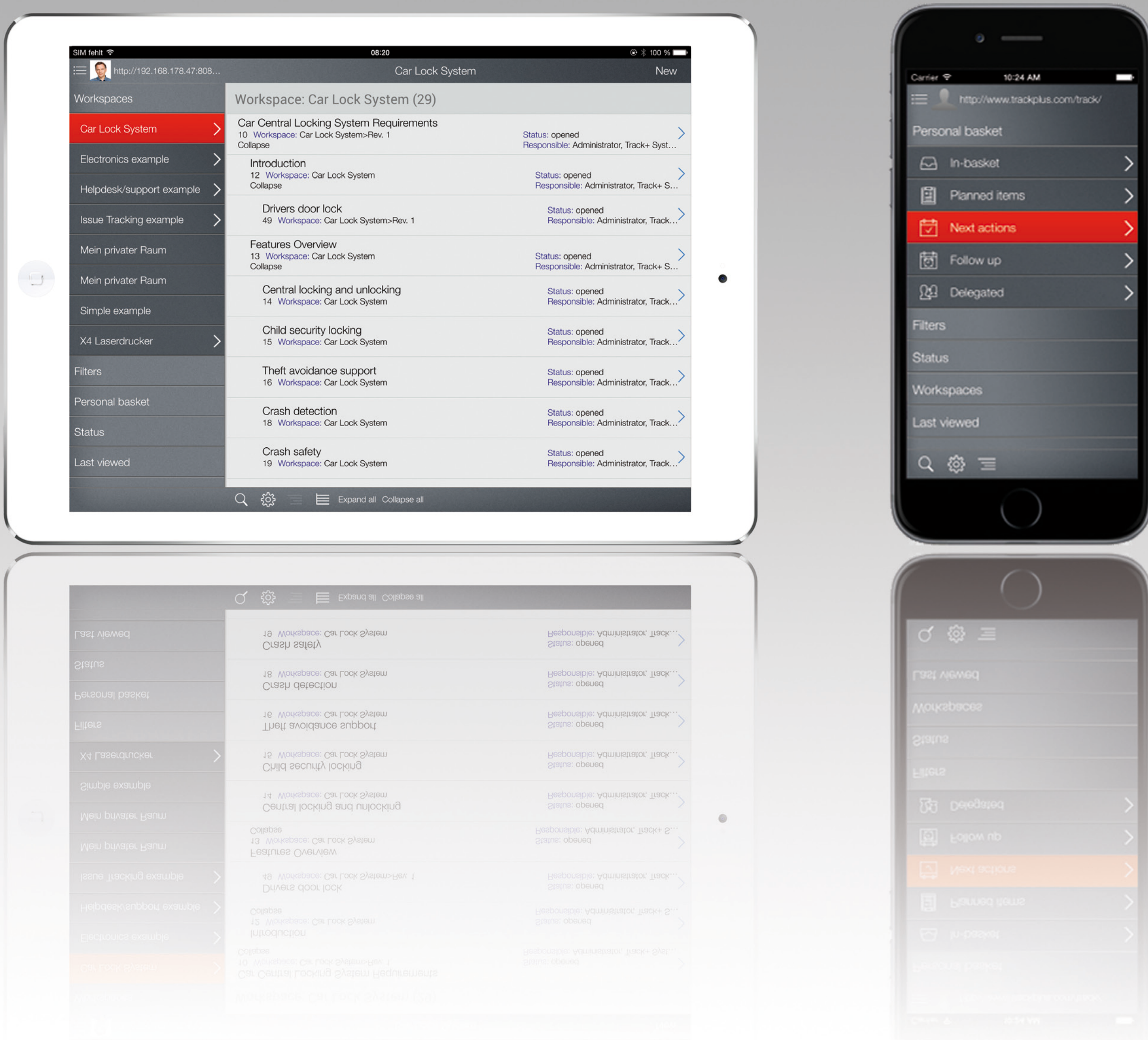

Release 2.0

Teamgeist Users's Manual

track+

Steinbeis-Transferzentrum
Task Management Solutions

Teamgeist User's Manual

Task Management Software

Steinbeis-Transferzentrum
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If you have any comments or suggestions regarding this document, please send them by e-mail to support@trackplus.com.

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Getting started

Topics:

1.1 What is Teamgeist?

Teamgeist is a mobile application for team task and project management. Teamgeist is available for iOS, Android, and Windows tablets and smart phones. To use Teamgeist you need to have an account on a Track+ server that you either operate yourself or that is provided to you.

Teamgeist permits you to manage your personal tasks and todo's as well as entire teams and projects. With Teamgeist you are up-to-date on all important matters even when you are on the road. Teamgeist gives you a functional subset of a Track+ server.

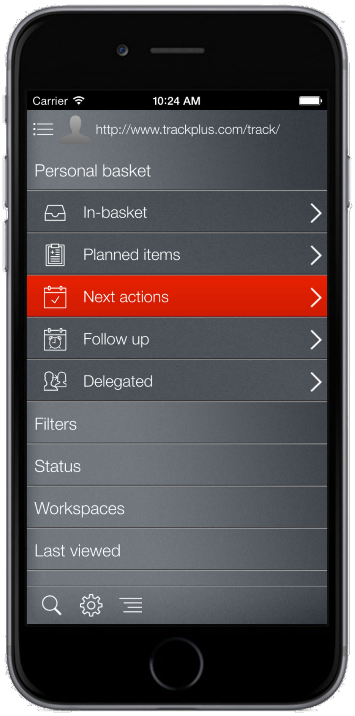

Figure 1-1: Teamgeist on a smart phone

1.2 Getting connected

To use Teamgeist you need to have an account on a Track+ server and must be logged in.

1.2 First login

After you have installed Teamgeist on your mobile device for the first time and have started the application you need to supply

- the URL of the server you want to connect to
- your user name on that server
- your password on that server

Subsequent calls of the application will take the setting you provided on your previous login.

Important: You should always use an SSL secured connection ("https" instead of just "http" at the start of the URL), otherwise the password could be intercepted. Even though the mobile client encrypts the password, that encryption cannot withstand a serious attempt to breach security.

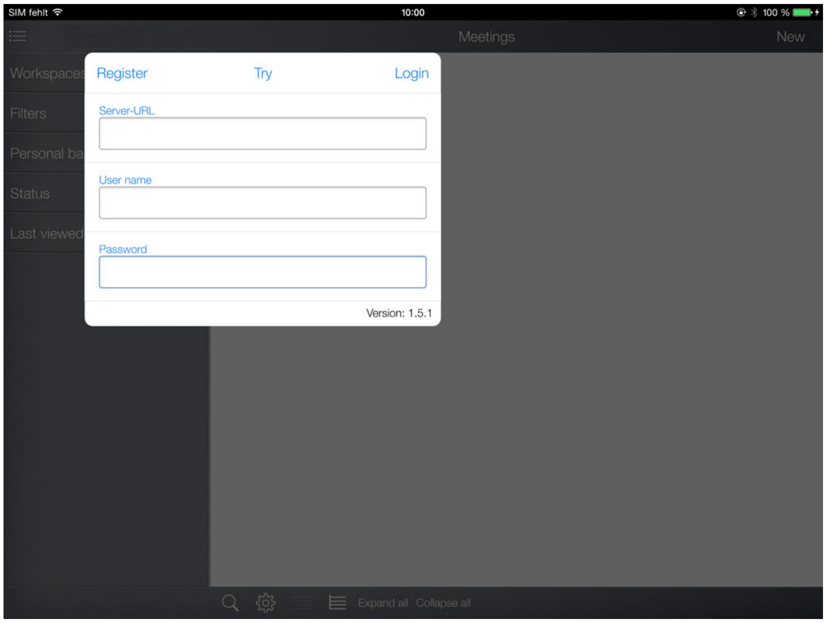

Figure 1-2: First login

1.2 Switching to another server or user

If you want to connect to a different server or as a different user you need to logout first.

Thereafter you can modify your connection parameters and login again.

To log out tap on the little wheel icon at the bottom of the screen.

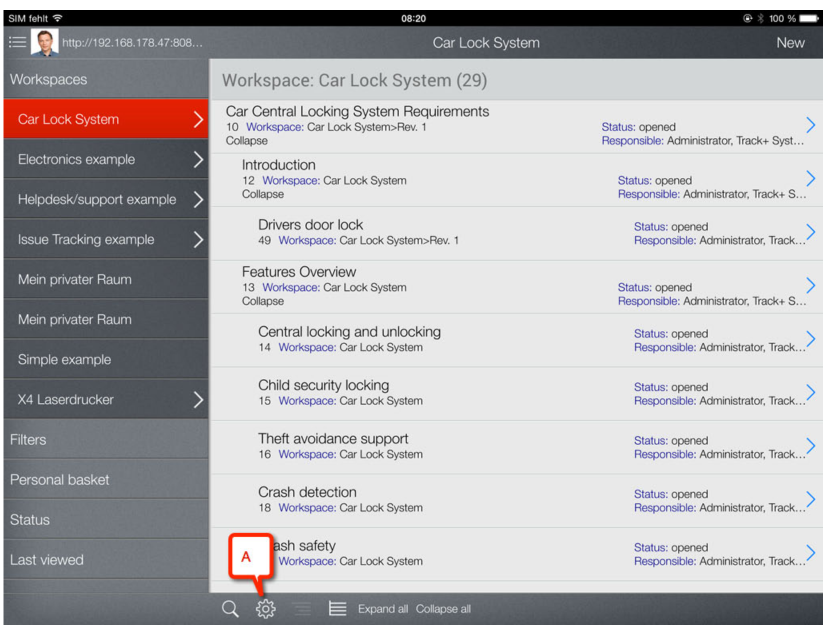

Figure 1-3: Logging out step 1

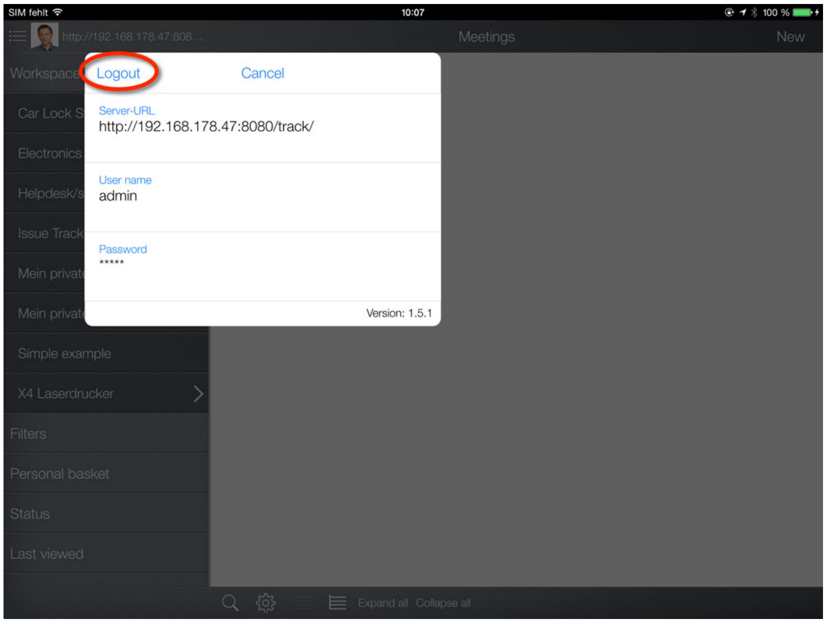

Figure 1-4: Logging out step 2

1.2 Registering with a server

In case you do not have an account you must either register with an existing Track+ server or have an administrator create an account for you. Self registration may have been disabled on your server.

To register tap on the "Register" label at the top of the connection dialog and fill out the form that appears.

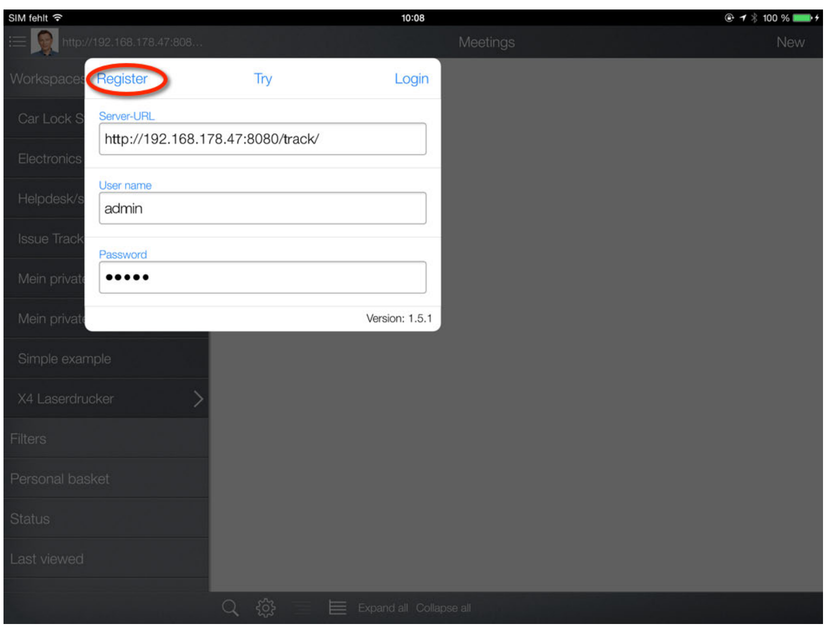

Figure 1-5: Registering step 1

You will receive an e-mail containing a confirmation link. You need to activate your account via this link before you can login.

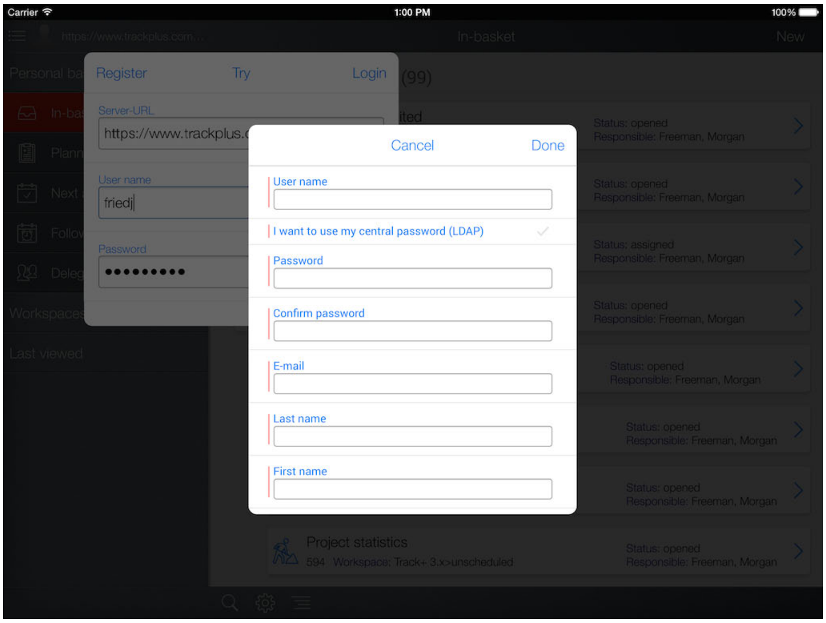

Figure 1-6: Registering step 2

1.2 Security

Teamgeist stores your connection details (server URL, user name, and password) on your mobile device. The password is encrpyted. Any other data used within Teamgeist is pulled from the server upon demand. The result of the last request is accessible even without a live connection to a server.

In case of loss of your mobile device the following information might be compromised:

- server URL
- user name
- password (encrypted)
- result of last query
- possibly details of the last task edited

The password encryption uses a private key provided by the server. While it is theoretically possible to retrieve the clear text password from its encrypted version using brute force, it would require a substantial computational effort to do so.

2

Working with Teamgeist

Topics:

2.1 Viewing items

The Teamgeist screen is divided into two areas: a navigation area with filters and the task list area. On a tablet device both are shown simultaneously while on a phone you manually switch between these two views.

To view a list of tasks or other items you apply one of the filters in the navigation area or use the full text search facility. What filters are available to you is configured on your server. The following sections describe the types of filters that are available. You may not see all of them depending on your server configuration.

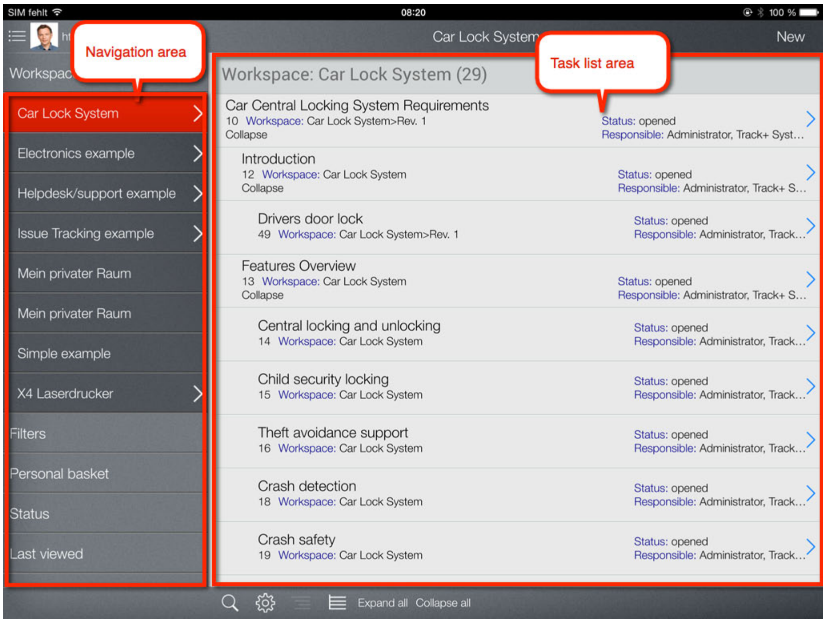

Figure 2-1: Navigation and task list area

2.1 Workspaces or projects

All items are organized in workspaces or projects. Workspaces and projects can themselves contain other workspaces or projects. You can select the desired workspace by tapping the respective entry in the navigation area. Tap the right arrow symbol to select a sub-workspace or phase/release.

The selection will contain all tasks and other items in that workspace, sub-workspace or release that have not been closed. To get closed items as well you need to apply custom filters.

If you have a private workspace only, this section will not be visible.

2.1 Personal baskets

You can categorize each item personally, just for yourself in personal baskets. This permits you to put follow-up dates on items, or to delegate items to others.

To get the list of items in one of the personal basket categories you tap on the respective entry in the navigation area. To move an item to a specific category tap on the item in the task list area long enough to have ot change its color, drag it to the navigation area and drop it there.

If you drop it into the "follow-up" bar you will be asked for a follow-up date and time.

If you drop it into the "delegate" bar you will be asked for a person to delegate it to, and a follow-up date.

2.1 Filters

The filters section offers you a list of pre-configured filters that you have subscribed to. To change this list you need to go to your server using a web-client with the same server URL you are using in Teamgeist.

2.1 States

Each item or task has a state. The most simple model has two states: "open" or "closed". To change the state of an item you can drag it onto the respective field in the navigation area and drop it there.

If in all workspaces you have access to only the two basic states are defined, the states section in the navigation area will not be shown. In the task list area you can change states using a check box.

2.1 Last used

This section lists the filters that you have used last.

2.1 Switching view modes

Tasks and other items in the task list area can be shown either as a flat list or as a tree structure. You can switch between different view modes using the icons in the bottom tool bar. When you are in tree view mode you can expand the entire tree using the "Expand all" button. You can collapse the entire tree using the "Collapse all" button.

2.2 Working with items

You can view items details, can create new items, can modify items, and can add comments to items.

2.2 Showing and hiding the navigation

To show or hide the navigation area use button **A** in Fig. 2-2. Use buttons **D** and **E** to expand or collapse the item tree.

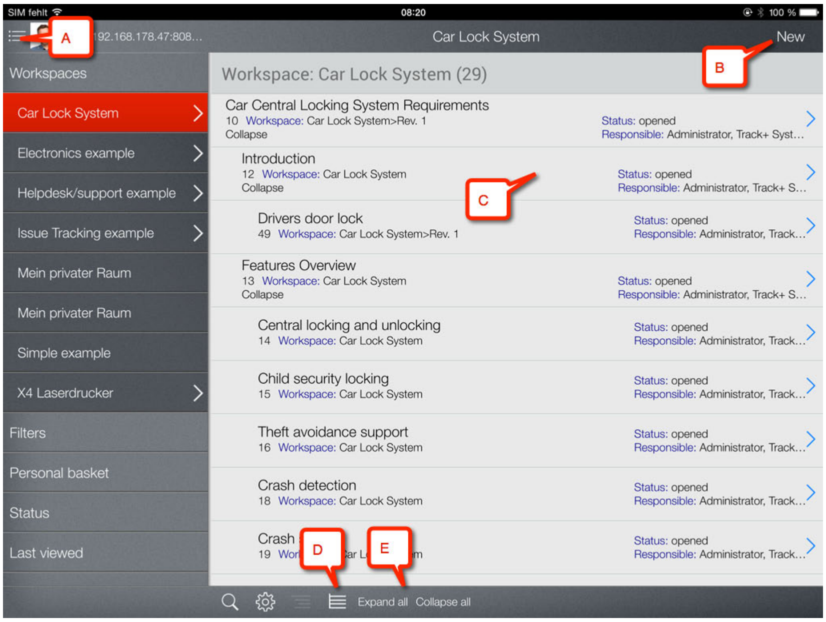

Figure 2-2: User interface elements

2.2 Viewing item details

To see details of an item tap on the item in the task list area (**C**) or on the arrow on the right side of an item (Fig. 2-2).

2.2 Creating items

To create an item tap on button **B** (Fig. 2-2). You will be asked for a workspace or project and an item type.

2.2 Editing items

To edit an item tap on the item in the task list area (**C**) or on the arrow on the right side of an item (Fig. 2-2). Then tap on button **B** to switch to edit mode.

2.2 Adding comments to items

To add or edit a comment a comment tap on the item in the task list area (**C**) or on the arrow on the right side of an item (Fig. 2-2). Then tap on the comment tab.

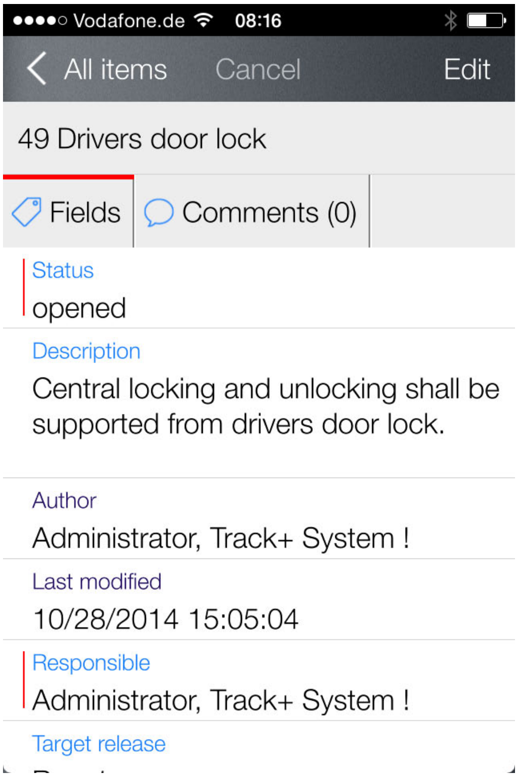

Figure 2-3: Comment tab

2.2 Changing item status or basket

To change the item status or basket drag the item to the respective field in the navigation area (Fig. 2-4).

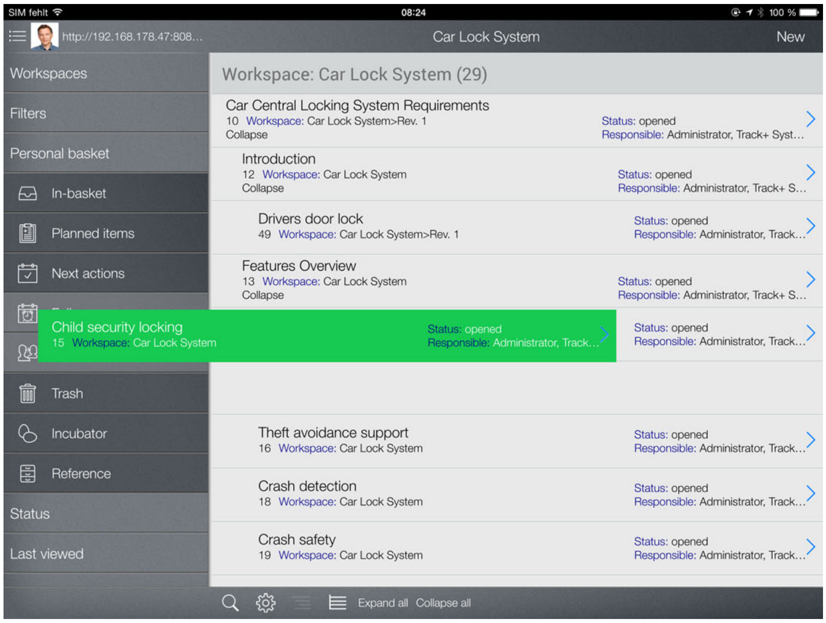

Figure 2-4: Comment tab

2.2 Simplifying the user interface

You can simplify the user interface on two ways:

1. You just have your own private workspace. The workspace area will disappear and all dialogs involving the selection of the workspace will not be shown anymore. The application behaves similar to a standard to-do list manager.
2. All workspaces you can access are configured to have just two item statuses like "opened" and "closed". The user interface will change such that the status area disappears and each item has a check box that shows its status. You close or reopen an item by tapping on the check box.

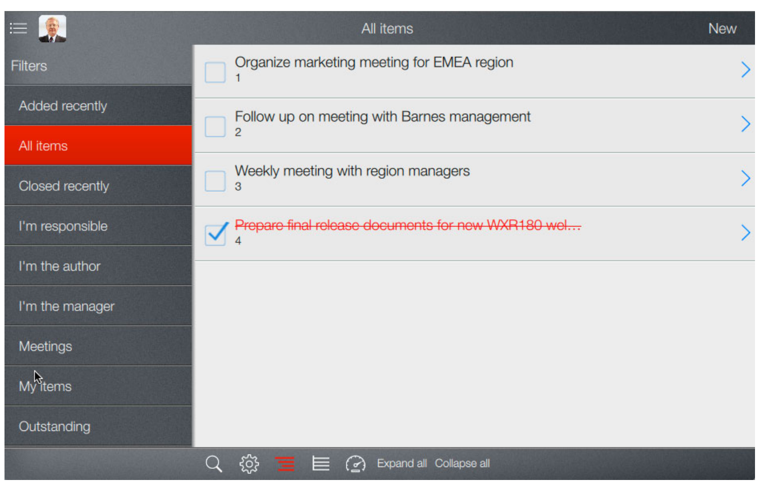

Figure 2-5: Simplified user interface with two item statuses

2.3 The Cockpit

With the cockpit you can visualize the information most important to you quickly in a single location. The configuration of your mobile cockpit is taken from the web client, except for some tiles which may not be available on the mobile device.

2.3 Switching to the cockpit

To switch to the cockpit view tap on the instrument symbol **A** in the bottom toolbar. To go back to the task list view tap on the flat or tree view symbols in the bottom toolbar.

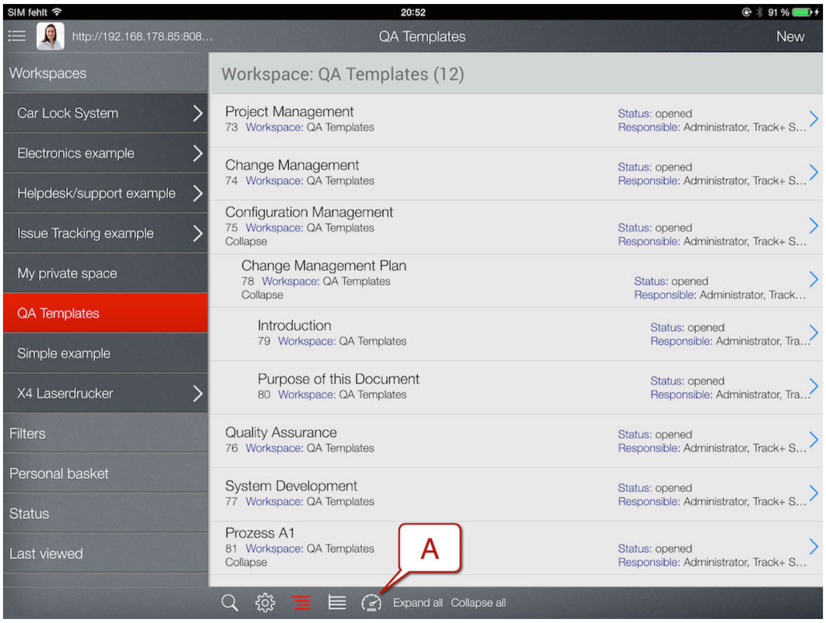

Figure 2-6: Switching to the cockpit

2.3 Activity stream

The activity stream shows you what has recently happened in the area of interest to you. You configure on the server the types of events you are interested in using filters.

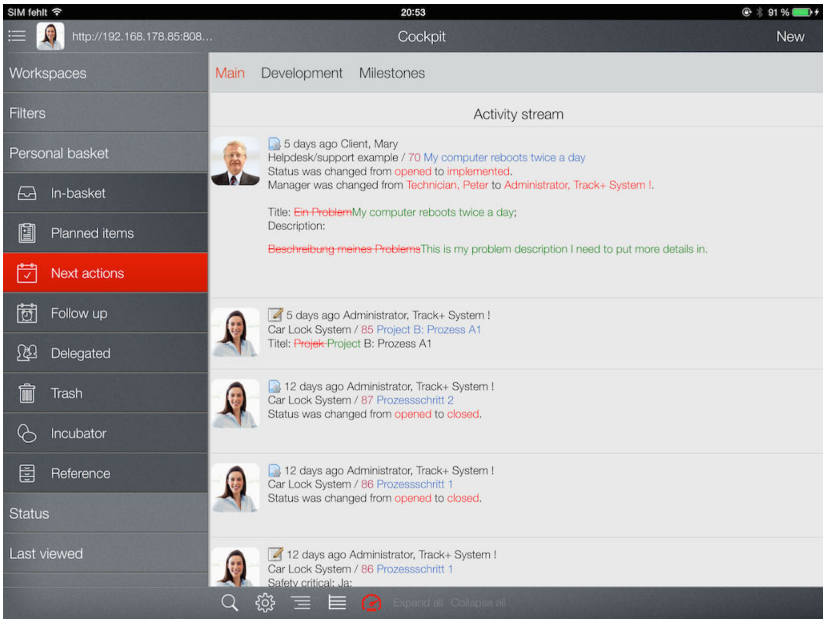

Figure 2-7: Activity stream cockpit tile

2.3 Status over time

The status over time graph displays the number of items over time. Which items are considered and the period and frequency of measurements you define on the server.

Figure 2-8: Status over time cockpit tile

2.3 Milestone trend analysis

The milestone trend analysis cockpit tile displays the development of milestone dates over time. Which items are considered and the period and frequency of measurements you define on the server.

Figure 2-9: Milestone trend analysis cockpit tile

2.3 Responsible load

The responsible load cockpit tile displays the distribution of open items for a set of team members.

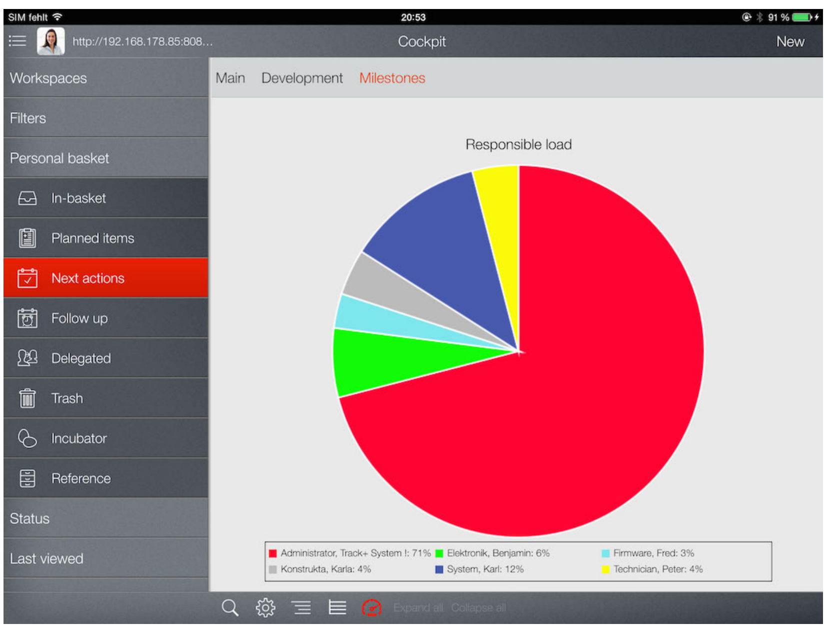

Figure 2-10: Responsible load