DreamTeam Feature Release Notes

These release notes support the Project Report Field Selectors that have been added to the Cost & Revenue, Resource Availability, Time & Expense and Issues & Action Items reports on the DreamTeam Project Reporter.

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1. Overview of the Project Report Field Selectors Feature

The DreamTeam Project Report now allows users the ability to add both standard and custom fields to the following DreamTeam Reports:

Cost & Revenue
Resource availability
Time & Expense
Issues & Action Items

Users now can add project, task and resource related fields to any of the reports mentioned above by clicking on the new Project Fields, Task Fields and Resource Fields buttons and then selecting their desired fields from the Availabile Fields box and clicking the green arrow and adding that field to the Selected Fields box. The selected fields will then be displayed as new columns on the report. Below you will find instructions by Report detailing how to utilize these new reporting features.
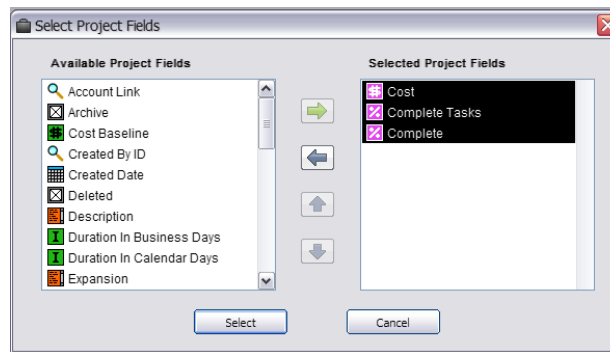
Cost & Revenue Report

DreamTeam users can add any project, task and resource related fields to the Cost & Revenue report.

To add fields to the Cost & Revenue Report follow the instructions below:

1. Go to the Project Reports application in the More Apps Menu
2. Select the projects an resources that you want to report on
3. Click on the Cost & Revenue Tab
4. Initially you will see columns containing Projects, Planned Cost, Planned Revenue and Planned Profit. To add project, task or resource related fields simply click on the appropriate button located above the View menus.

5. Similar to adding fields to the Standard Report, simply click on the appropriate button and select the fields you want to add from the Available Fields box and click the green arrow and add those fields to the Selected Fields box.

6. Once selected, these selected fields will be added as columns to the Cost & Revenue Report. These columns will be displayed in order of the view menus. (Ex: If the view menus are by projects, tasks and resources, then the projects fields will be added first.)

7. Users can still add the Actual, Planned and Remaining Hour columns by checking the Show Actual and Planned Hours check box to the right.

Resource Availability Report

DreamTeam users now have the ability to add project, task and resource related fields to the Resource Availability Report.

To add fields to the Resource Availability Report follow the instructions below:

1. Go to the Project Reports application in the More Apps Menu

2. Select the projects an resources that you want to report on

3. Click on the Resource Availability Tab

4. Initially you will see the same options as before, but now you will also see the Project Fields, Task Fields and Resource Fields buttons right above the Options menu. To add project, task or resource related fields simply click on the appropriate button located above the View menus.

5. Similar to adding fields to the Standard Report, simply click on the appropriate button and select the fields you want to add from the Available Fields box and click the green arrow and add those fields to the Selected Fields box.

6. Once selected, these selected fields will be added as columns within the Resource Availability report table. These columns will be displayed in order of the view menus. (Ex: If the view menus are by projects, tasks and resources, then the projects fields will be added first.)

Resource Availability Report From: 2010-08-01 To 2010-08-31

| Projects & Resources | Standard Report | Cost & Revenue | Resource Availability | Resource Leveling | Time & Expense | Issues & Action Items |

Dates: This Month

Fields: Project Fields | Task Fields | Resource Fields | ☐ Show Long Descriptions

Options: Show Hours Worked | Report By Days | ☐ Show Empty Columns | ☐ Show Unassigned Tasks

View: Projects | Tasks | Resources | ☐ Show Unassigned Resources

Project	Task	Resource	Task: Cost	Task: Complete	2010-08-13	2010-08-16	2010-08-17	2010-08-18	2010-08-19	2010-08-20	2010-08-23	2010-08-24	2010-08-25	2010-08-26	2010-08-27
A					16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00
	A1		GBP 1,320.00	70%											
		Geoffrey Appleton													
		Todd Appleton													
	A2		GBP 2,640.00	0%	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00
		Geoffrey Appleton			8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00
		Todd Appleton			8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00
B					16:00	16:00	56:00	56:00	56:00	56:00	56:00	16:00	16:00	16:00	16:00
	B1		GBP 2,640.00	70%											
		Geoffrey Appleton													
		Todd Appleton													
	B2		GBP 5,280.00	0%	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00	16:00
		Geoffrey Appleton			8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00
		Todd Appleton			8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00	8:00
	Task 10		GBP 800.00	0%			40:00	40:00	40:00	40:00	40:00				
		Geoffrey Appleton					40:00	40:00	40:00	40:00	40:00				
My Project														37:30	7:30
	Task 3		GBP 0.00	0%										7:30	7:30

Time & Expense Report

DreamTeam users now have the ability to add project, task and resource related fields to the Time & Expense Report.

To add fields to the Time & Expense Report follow the instructions below:

1. Go to the Project Reports application in the More Apps Menu

2. Select the projects an resources that you want to report on

3. Click on the Time & Expense Tab

4. Initially you will see the same options as before, but now you will also see the Project Fields, Task Fields and Resource Fields buttons right above the Options menu. To add project, task or resource related fields simply click on the appropriate button located above the View menus.

5. Similar to adding fields to the Standard Report, simply click on the appropriate button and select the fields you want to add from the Available Fields box and click the green arrow and add those fields to the Selected Fields box.

6. Once selected, these selected fields will be added as columns within the Resource Availability report table. These columns will be displayed in order of the view menus. (Ex: If the view menus are by projects, tasks and resources, then the projects fields will be added first.)

Issues & Action Items Report

DreamTeam users now have the ability to add project, task and resource related fields to the Issues & Action Items Report.

To add fields to the Time & Expense Report follow the instructions below:

1. Go to the Project Reports application in the More Apps Menu

2. Select the projects an resources that you want to report on

3. Click on the Time & Expense Tab

4. Initially you will see the same options as before, but now you will also see the Project Fields, Task Fields and Resource Fields buttons right above the Options menu. To add project and task related fields simply click on the appropriate button located above the View menus.

5. Similar to adding fields to the Standard Report, simply click on the appropriate button and select the fields you want to add from the Available Fields box and click the green arrow and add those fields to the Selected Fields box.

6. Once selected, these selected fields will be added as columns within the Issues & Action Items report table. These columns will be displayed in order of the view menus.

Fullscreen | More Apps ▾ | View ▾ | Support ▾   DreamTeam Project Reporter

Issue and Action Item Report Finished

| Projects & Resources | Standard Report | Cost & Revenue | Resource Availability | Resource Leveling | Time & Expense | Issues & Action Items |

Fields: [Project Fields] [Task Fields]

Options: [Any Action Item Status ▾] [Any Action Item Date ▾] ☐ Show Long Descriptions
[Any Issue Status ▾] [Any Issue Type ▾] [Any Issue Priority ▾] [Any Issue Severity ▾]

Project	Task	Project: Start Date	Highlight	Issue	Action Item	Owner	Created Date	Resolve By	Due Date	Status	Type	Priority	Severity	Description	Impact	Resolut
A		2010-08-10 8:00 AM														
	(No Task)															
			New Highlight			Todd Appleton	2010-08-17					Medium				
				project issue		Todd Appleton	2010-08-18	2010-08-26		Not Started	Issue	Medium	Medium			Mac OS X Tiger (ven
					project issue action	Todd Appleton	2010-08-18		2010-08-25	Completed						
	A2															
					task action	Todd Appleton	2010-08-18		2010-08-18	Not Started						
				task issue		Todd Appleton	2010-08-18	2010-08-19		Not Started	Issue	Medium	Medium			
					task issue action	Todd Appleton	2010-08-18		2010-08-31	Completed						
B		2010-08-10 8:00 AM														
	(No Task)															
			Proj B Highlight			Todd Appleton	2010-08-26					Medium		this is the hl for project B.		
	B1															
				222222			2010-08-26			Not Started	Issue	Medium	Medium			
					333333		2010-08-26			Not Started						

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2. Product Support:

The purpose of this document is to highlight the Delta Select feature. Please direct all questions to DreamFactory Support at one of the following Support Options.

Live Chat – You can initiate a Live Chat with one of our Success Engineers by simply clicking on the Support Menu and selecting the Live Chat option.

Phone Support – You can contact our Support Engineers by phone at 1-877-577-3453 or by selecting the Phone Support option from the Support Menu.

Email Support – You can also email DreamFactory Support at support@dreamfactory.com.

Support Wiki – You can access additional information by accessing the DreamFactory Support Wiki online at http://dreamfactory.pbworks.com/SnapShot.

DreamFactory Support is available 5:00 AM until 5:00 PM PST (8:00 AM – 8:00PM EST) M-F.