

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 Available 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

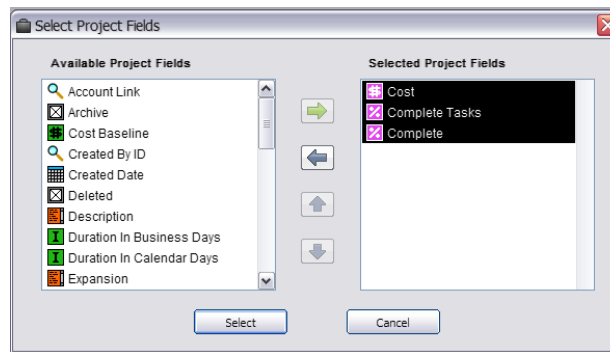
DreamTeam users can add any project, task and resource related fields to the Cost & Revenue report.

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 or 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.

Project	Planned Cost	Planned Revenue	Planned Profit
A	GBP 3,960.00	GBP 0.00	-GBP 3,960.00
B	GBP 8,720.00	GBP 0.00	-GBP 8,720.00
My Project	GBP 0.00	GBP 0.00	GBP 0.00
Grand Totals	GBP 12,680.00	GBP 0.00	-GBP 12,680.00

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.)

Project	Project: Cost	Project: Complete Tasks	Project: Complete	Planned Cost	Planned Revenue	Planned Profit
A	GBP 3,960.00	0%	27%	GBP 3,960.00	GBP 0.00	-GBP 3,960.00
B	GBP 0.00	0%	0%	GBP 8,720.00	GBP 0.00	-GBP 8,720.00
My Project	GBP 0.00	0%	0%	GBP 0.00	GBP 0.00	GBP 0.00
Grand Totals				GBP 12,680.00	GBP 0.00	-GBP 12,680.00

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

Fullscreen More Apps View Support

Cost and Revenue Report Finished

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

Fields: Project Fields Task Fields Resource Fields Show Actual & Planned Hours

View: Project None None Show Long Descriptions

Project	Project Cost	Project Complete	Actual Hours	Planned Hours	Remaining Hours	Planned Cost	Planned Revenue	Planned Profit
A	GBP 3,960.00	27%	0.00	264.00	264.00	GBP 3,960.00	GBP 0.00	-GBP 3,960.00
B	GBP 0.00	0%	0.00	464.00	464.00	GBP 8,720.00	GBP 0.00	-GBP 8,720.00
My Project	GBP 0.00	0%	0.00	60.00	60.00	GBP 0.00	GBP 0.00	GBP 0.00
Grand Totals			0.00	788.00	788.00	GBP 12,680.00	GBP 0.00	-GBP 12,680.00

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 and 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.

- 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

Dates: This Month
 Fields: Project Fields, Task Fields, Resource Fields
 Options: Show Hours Worked, Report By Days, Show Empty Columns, Show Unassigned Tasks
 View: Projects, Tasks, 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	A1	Geoffrey Appleton	GBP 1,320.00	70%	16.00	16.00	16.00	16.00	16.00	16.00	16.00	16.00	16.00	16.00	16.00
		Todd Appleton													
	A2	Geoffrey Appleton	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
		Todd 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	B1	Geoffrey Appleton	GBP 2,640.00	70%	16.00	16.00	56.00	56.00	56.00	56.00	56.00	16.00	16.00	16.00	16.00
		Todd Appleton													
	B2	Geoffrey Appleton	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
		Todd 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	Geoffrey Appleton	GBP 800.00	0%			40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
		Todd Appleton					40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00
My Project	Task 3	Geoffrey Appleton	GBP 0.00	0%										37.30	7.30
		Todd Appleton												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 and 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.

Project	Task	Resource	User	Contact	Date	Time Logged	Actual Cost	Actual Revenue	Actual Profit	Planned Hours	Planned Cost	Planned Revenue	Planned Profit	Status	Billable	Billing
B	B1	Geoffrey Appleton				67.00	GBP 1,880.00	GBP 1,260.00	-GBP 420.00	794.39	GBP 20,640.00	GBP 0.00	-GBP 20,640.00			
		Todd Appleton								88.00	GBP 2,540.00	GBP 0.00	-GBP 2,540.00			
	B2	Geoffrey Appleton				33.00	GBP 320.00	GBP 240.00	-GBP 80.00	176.00	GBP 5,280.00	GBP 0.00	-GBP 5,280.00			
		Todd Appleton06			2010-08-24	5.00	GBP 0.00	GBP 0.00	GBP 0.00	88.00	GBP 1,760.00	GBP 0.00	-GBP 1,760.00	Saved	No	f
		Todd Appleton06			2010-08-23	5.00	GBP 0.00	GBP 0.00	GBP 0.00					Saved	No	f
		Todd Appleton06			2010-08-27	5.00	GBP 0.00	GBP 0.00	GBP 0.00					Saved	No	f
		Todd Appleton06			2010-08-25	5.00	GBP 0.00	GBP 0.00	GBP 0.00					Saved	No	f
		Todd Appleton06			2010-08-25	5.00	GBP 0.00	GBP 0.00	GBP 0.00					Saved	No	f
		Todd Appleton			2010-08-26	4.00	GBP 180.00	GBP 120.00	-GBP 40.00					Saved	No	f
		Todd Appleton			2010-08-24	4.00	GBP 180.00	GBP 120.00	-GBP 40.00					Saved	No	f
	Task 10	Geoffrey Appleton								133.19	GBP 2,400.00	GBP 0.00	-GBP 2,400.00			
		Todd Appleton								68.39	GBP 800.00	GBP 0.00	-GBP 800.00			
		Todd Appleton								68.39	GBP 1,600.00	GBP 0.00	-GBP 1,600.00			
										88.00	GBP 1,760.00	GBP 0.00	-GBP 1,760.00			

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.

Select Project Fields

Available Project Fields

- Account Link
- Archive
- Cost Baseline
- Created By ID
- Created Date
- Deleted
- Description
- Duration In Business Days
- Duration In Calendar Days
- Expansion

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Selected Project Fields

- Cost
- Complete Tasks
- Complete

Select
Cancel

- 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.)

Timesheet Report From: 2010-08-08 To 2010-08-08

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

Dates: All Dates Show Planned Cost & Revenue

Fields: Project Fields | Task Fields | Resource Fields

Options: Timesheets | All Entries Show Long Descriptions

View: Projects | Tasks | Resources | Users & Contacts

Project	Task	Resource	Task: Complete	User	Contact	Date	Time Logged	Actual Cost	Actual Revenue	Actual Profit	Planned Hours	Planned Cost	Planned Revenue	Planned Profit	Status
A							9:00	GBP 180.00	GBP 135.00	-GBP 45.00	727.59	GBP 8,886.66	GBP 0.00	-GBP 8,886.66	
	A1		70%								88.00	GBP 1,320.00	GBP 0.00	-GBP 1,320.00	
		Geoffrey Appleton									44.00	GBP 440.00	GBP 0.00	-GBP 440.00	
		Todd Appleton									44.00	GBP 880.00	GBP 0.00	-GBP 880.00	
	A2		0%								176.00	GBP 2,640.00	GBP 0.00	-GBP 2,640.00	
		Geoffrey Appleton									88.00	GBP 880.00	GBP 0.00	-GBP 880.00	
		Todd Appleton									88.00	GBP 1,760.00	GBP 0.00	-GBP 1,760.00	
	Task 10		0%				9:00	GBP 180.00	GBP 135.00	-GBP 45.00	199.59	GBP 1,066.66	GBP 0.00	-GBP 1,066.66	
		Geoffrey Appleton									166.39	GBP 400.00	GBP 0.00	-GBP 400.00	
		Todd Appleton									33.19	GBP 666.66	GBP 0.00	-GBP 666.66	
		Todd Appleton				2010-08-23	3:00	GBP 60.00	GBP 45.00	-GBP 15.00					Save
		Todd Appleton				2010-08-25	3:00	GBP 60.00	GBP 45.00	-GBP 15.00					Save
		Todd Appleton				2010-08-27	3:00	GBP 60.00	GBP 45.00	-GBP 15.00					Save
	A1		70%								88.00	GBP 1,320.00	GBP 0.00	-GBP 1,320.00	
		Geoffrey Appleton									44.00	GBP 440.00	GBP 0.00	-GBP 440.00	
		Todd Appleton									44.00	GBP 880.00	GBP 0.00	-GBP 880.00	
	A2		0%								176.00	GBP 2,640.00	GBP 0.00	-GBP 2,640.00	
		Geoffrey Appleton									88.00	GBP 880.00	GBP 0.00	-GBP 880.00	

Export | Print

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 and 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.

The screenshot shows the DreamTeam Project Reporter interface. At the top, there are navigation tabs: 'Projects & Resources', 'Standard Report', 'Cost & Revenue', 'Resource Availability', 'Resource Leveling', 'Time & Expense', and 'Issues & Action Items'. Below the tabs, there are 'Fields:' buttons for 'Project Fields' and 'Task Fields', both highlighted with red arrows. Below the fields are 'Options:' dropdown menus for 'Any Action Item Status', 'Any Action Item Date', 'Any Issue Status', 'Any Issue Type', 'Any Issue Priority', and 'Any Issue Severity'. A table below displays the report data with columns: Project, Task, Highlight, Issue, Action Item, Owner, Created Date, Resolve By, Due Date, Status, Type, Priority, Severity, Description, Impact, and Resolution. The table is divided into sections A and B. Section A includes rows for 'New Highlight', 'project issue', 'project issue action', 'task issue', and 'task issue action'. Section B includes rows for 'Proj B Highlight' and '222222'. At the bottom, there are 'Export' and 'Print' buttons.

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.

The screenshot shows the 'Select Project Fields' dialog box. It has two main sections: 'Available Project Fields' on the left and 'Selected Project Fields' on the right. The 'Available Project Fields' list includes: Account Link, Archive, Cost Baseline, Created By ID, Created Date, Deleted, Description, Duration In Business Days, Duration In Calendar Days, and Expansion. The 'Selected Project Fields' list includes: Cost, Complete Tasks, and Complete. There are green and blue arrows between the lists for moving fields, and 'Select' and 'Cancel' buttons at the bottom.

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.