**TeamDynamix User License Breakdown**

License costs are prorated quarterly. During a quarter, new users can be added. At the end of that quarter, UM will true up with Team Dynamix. See PDF for pricing breakdown.

<table>
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<tr>
<th>User Type</th>
<th>Key Capabilities</th>
<th>Key Limitations</th>
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<tbody>
<tr>
<td>Enterprise</td>
<td>Ability to participate in the portfolio planning &amp; governance process, access to all of the out of the box and custom reporting tools, and create/maintain project status, charter, resources and budget information.</td>
<td>No limitations. Common roles would be (but not limited to): executive leadership, directors, administrators, portfolio planners and project managers.</td>
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<tr>
<td>Technician</td>
<td>Technicians can manage every aspect of the ticketing lifecycle with full access to the ticketing application for both help desk and operational tracking functions. Technicians also have the following project related capabilities: Ability to update task, issue and risk information. This includes tracking time, expenses, and status against Tasks, and Issues. Technicians can also create issues, tasks, task plans as well as upload/download project documentation.</td>
<td>Service desk technicians are focused on managing tickets (incidents, Problems, and changes) as well as operational work and project work. The technician cannot access non-ticket related analysis reporting, portfolio planning, financial reporting and resource management tools.</td>
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<td>Student Technician</td>
<td>Student technicians have all of the capabilities of the Service Desk Technician but this license is designated specifically for student help desk resources who work 2 days or fewer per week at the help desk.</td>
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<tr>
<td>Clients</td>
<td>Ability to access the client portal and use the service catalog (submit requests), knowledge base, and F &amp; Q. Additionally, they can view relative project information as well as add and update documents, issues and risks.</td>
<td>TDClient users are intended to request work and view work status only. They cannot make updates to tasks, tickets or time.</td>
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How to Best Generate User License Counts?

TeamDynamix finds a “top down” internal analysis to be the best approach for associating the right fitting license to the appropriate individuals within the typical higher education work environment.

Example license review methodology:

1. Create a spreadsheet with everyone’s basic contact information from the different areas of the University or College that will be a technical user of TeamDynamix.

2. Identify the Enterprise users first by using the below questions/criteria for each user. If the user requires one of the below abilities then mark them as an Enterprise user.
   a. Who needs admin access to affect configurations? (Define and manage SLA’s, add/change user access information, define and create security roles, etc.)
   b. Who needs access to create, view, and/or drill down on reports concerning portfolio views, resource management and projects across the organization?
   c. Who needs the ability to evaluate and approve project requests? This also includes any technical user that will need the ability to collect and enter project charter information during the project request review workflow.
   d. Who needs the ability to create and publish dashboards for public consumption?
   e. Who needs the ability to manage a project’s status, charter and scope information? This includes adding resources to the project or operational workspaces and maintaining their high level allocations (estimated hours).

3. Identify the Technician Users next. This step should be the easiest since the remaining names on your list will most likely qualify as a technician.
   a. Who are the different service owners that will need to manage the service detail page, custom attributes, request entry forms, associated knowledge and files, resource allocations, etc…?
   b. Ability to Create and update tickets (work requests, incidents, problem, change and releases)
   c. Ability to Create and update project tasks and issues
   d. Ability to approve ticketing related workflow steps that require approval
   e. Ability to access and create reports/Desktop widgets for the Surveys, Assets, and Tickets application

4. Of the Technician Users identified, how many are students? We have a Student Technician license which is heavily discounted because they tend to work about half the time of a full-time technician. The Student Tech licenses has the same capability as the normal technician.