



Discovery. Diversity. Distinction.

**TeamDynamix  
IT PROJECT REQUESTS  
How to submit a request**

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## Welcome!

TeamDynamix is a web-based project management solution that is used to track projects and allow for easy updates and reporting on project status. Clients are also able to access TeamDynamix to view project status as well as submit IT Project and work requests.

This User Guide is an overview for users responsible for submitting project requests. These basic steps will help to guide users through the general process of submitting IT-related project requests in TeamDynamix.

## Accessing TeamDynamix

TeamDynamix is accessed by using your web browser to enter the site:

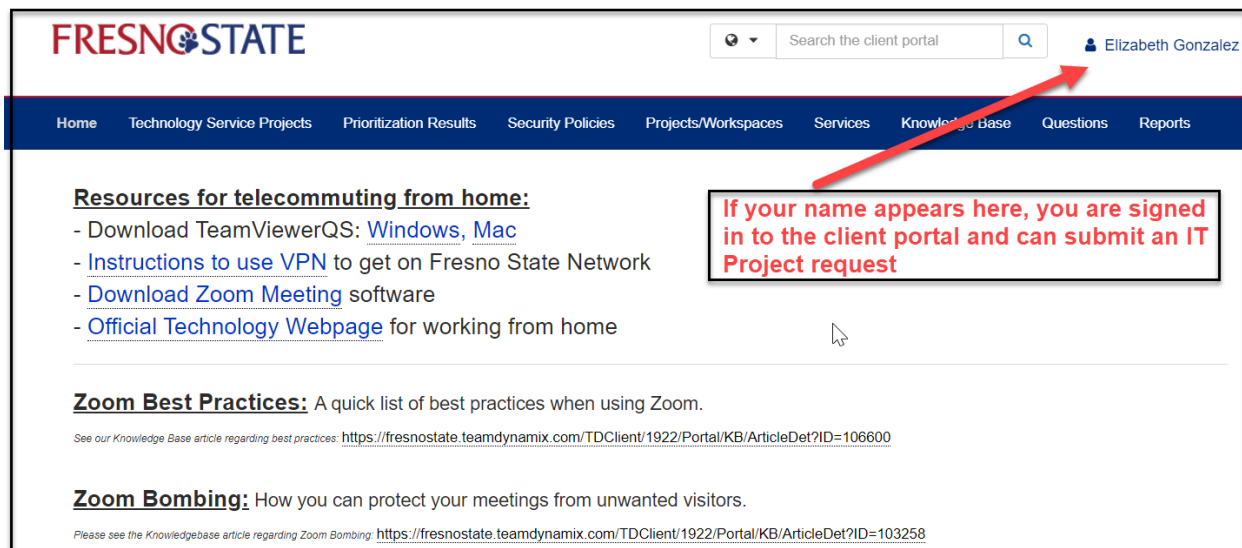
<https://fresnostate.teamdynamix.com>.

The username and password for TeamDynamix should be synchronized with the Fresno State email address and password (SSO).

Complete the login process by entering your username, password and clicking the LOGIN button.

Once you reach the client portal, you are already signed in if you see your name displayed on the upper right hand corner. If you don't see your name displayed, follow the next step.

Once you're in the client portal, click the "Sign In" link in the upper right hand corner. Your name should appear. If you are already signed in, your name appears in the upper right corner.



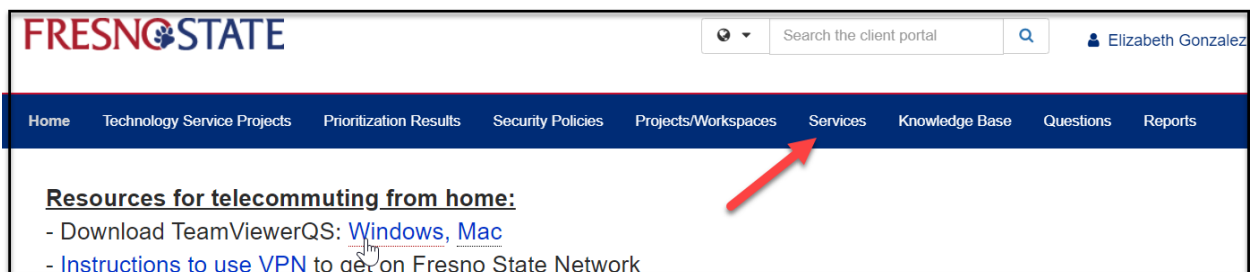
The screenshot shows the Fresno State client portal interface. At the top left is the Fresno State logo. To its right is a search bar with the text "Search the client portal" and a magnifying glass icon. Further right, the user's name "Elizabeth Gonzalez" is displayed next to a user icon. Below the search bar is a dark blue navigation menu with the following items: Home, Technology Service Projects, Prioritization Results, Security Policies, Projects/Workspaces, Services, Knowledge Base, Questions, and Reports. The main content area contains several sections: "Resources for telecommuting from home:" with a list of links for downloading TeamViewer, using VPN, downloading Zoom, and the official technology webpage; "Zoom Best Practices:" with a link to a knowledge base article; and "Zoom Bombing:" with a link to another knowledge base article. A red arrow points from a text box to the user's name in the top right corner. The text box contains the instruction: "If your name appears here, you are signed in to the client portal and can submit an IT Project request".

## Accessing the Services Home Page

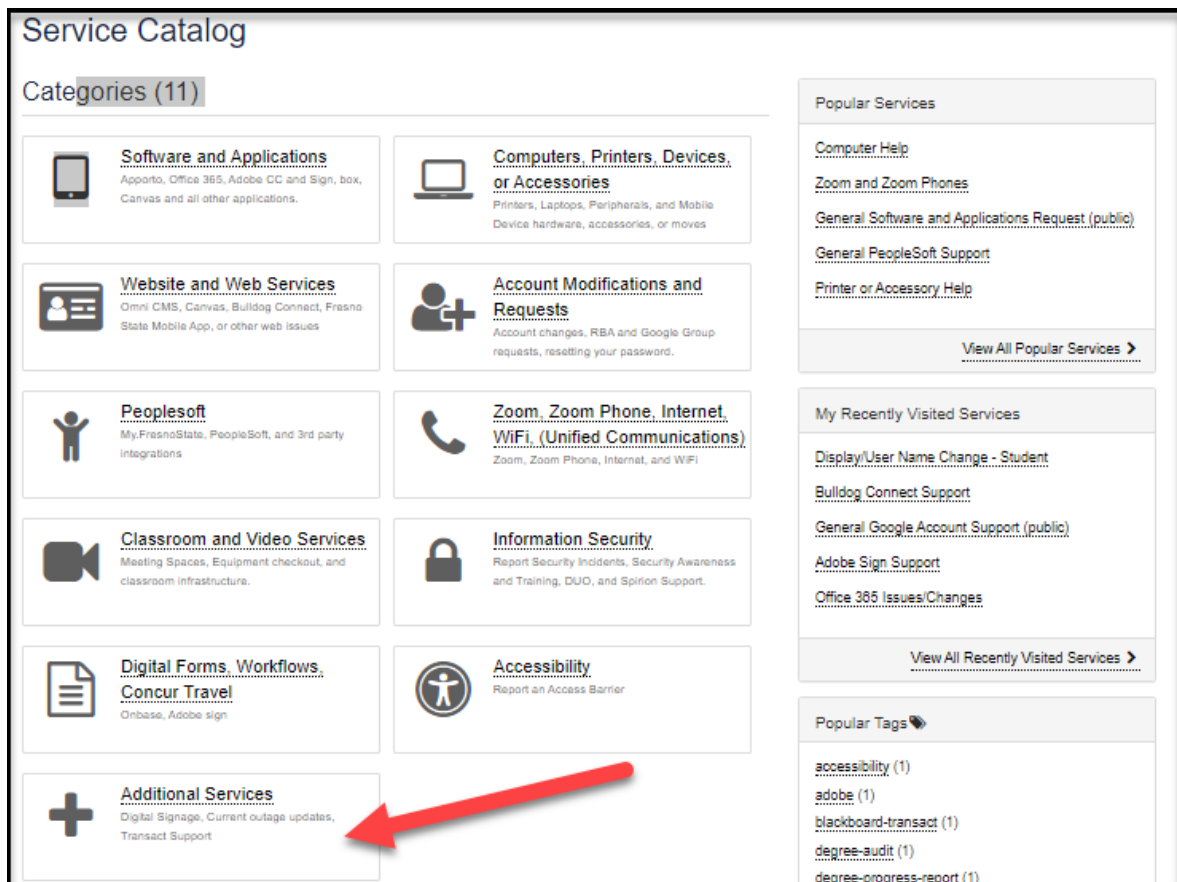
Once you're signed in, you will be directed to the Service Catalog home page. The Service Catalog lists the different types of requests you can submit to Technology Services.

The preferred and quickest way to access the **IT Project Request form** is by the following these instructions:

- 1) Click on the Services tab.



- 2) Click on the Additional Services button to access the project request link.



3) Click on the Technology Services Project Request link:

Service Catalog / Additional Services

## + Additional Services


Digital Signage, Current outage updates, Transact Support

### Services (4)

[Digital Signage / Kiosk Support Service](#)  
Requests for assessing potential use of digital signage or kiosks at location on campus.

[Duplicate ID Cleanup](#)

[Request Updates to Current Outage](#)  
Request updates to a current or active outage. View current outages and their ID numbers here:  
<https://fresnostate.teamdynamix.com/TDClient/19...>

[Technology Services Project Request](#) 

Request IT-Related Projects

4) Click on the Request Project button:


FRESNOSTATE Search the client portal Elizabeth Gonzalez

Home Technology Service Projects Prioritization Results Security Policies Projects/Workspaces Services Knowledge Base Questions Reports

Project Requests Ticket Requests My Favorites My Recent My Approvals Services A-Z Categories Permissions Audit Templates Search

Service Catalog / Project Management / Technology Services Project Request

## Technology Services Project Request

[Request Project](#) 

OVERVIEW

## Creating a Project Request

- 1) Enter the project information on the form. Please provide as much detail as possible.  
\*Note: when you get to the end of the form, scroll back up to the top and click Save.  
You can also click Save before completion and come back to the form later.

The screenshot shows a web browser window with a navigation bar at the top containing links for Home, Technology Service Projects, Current Systems Status, Security Policies, Projects, Services, and Knowledge Base. The main heading is "Technology Services Project Request".

Annotations on the form include:

- A red arrow points to a "Save" button with the text: "When you get to the end of the form scroll back up and save".
- Next to the "Requestor Name" field is the text: "Name of requester (yourself or on behalf of another person)".
- Next to the "Division Delegate" radio button list is the text: "Select your Division Delegate".
- Next to the "Brief Project Description" text area is the text: "Describe the project".
- Next to the "Department" dropdown menu is the text: "Dept is auto-filled based on requestor's dept.".

The form fields are as follows:

- Requestor Name \***: A text input field.
- Division Delegate \***: A list of radio buttons with the following options:
  - Diana Ralls - President's Office
  - Dr. Alam Hasson - Academic Affairs
  - John Fugatt - Administration and Finance
  - Kelly Russell - Student Affairs and Enrollment Management
  - Leticia Cano - Advancement
  - Matt Studwell - Athletics
  - Robert Guinn - Campus-Wide
  - Robert Guinn - Technology Services
- Brief Project Description \***: A large text area for describing the project.
- Department \***: A dropdown menu currently showing "DeputyChief Information Office".

**Project Name \*** ⓘ  
Choose a name that is descriptive of your project, i.e., Student Accounts 1098-T Enhancement

**Enter the Project Name**

**Contact Number \*** ⓘ  
Enter primary contact persons phone number. Please use the following format: xxx - xxx - xxxx

**Phone number of primary contact**

**Why is there a business need? What solutions are you looking for? What are the issues? \*** ⓘ  
Why is there a business need? What solutions are you looking for? What are the issues?

**Provide as much detail as possible**

**What is the expected go live month and year?**

MM/YYYY

**This is the month/year you want your project to be in Production**

**Is it Mandatory, Regulatory, Compliance, or Accreditation? \*** ⓘ  
Please check all that apply.

Accreditation  
 Compliance  
 Mandatory  
 Regulatory  
 Not Applicable

**Check all that apply**

**Is this a Value-add, a Process improvement or Business opportunity? (Please Explain) \*** ⓘ  
If none type, no. Example: Redefining processes to make them more efficient; Reducing time it takes for a service; Improving cross campus department collaboration.

**Provide as much detail as possible**

**Is this project required to reduce risk? (Please Explain) \*** ⓘ  
**If it does not reduce risk type, no.** Example: Server is end of life; software needs upgrade to be supported by vendor; do not have internal expertise; technology not supported for project request; space limitations; funding not available.

**Provide as much detail as possible.**

**Is this a Value-add, a Process improvement or Business opportunity? (Please Explain) \*** ⓘ  
**If none type, no.** Example: Redefining processes to make them more efficient; Reducing time it takes for a service; Improving cross campus department collaboration.

**Provide as much detail as possible.**

**How Does this Project Align to Strategic Priority One \*** ⓘ  
Please refer to <http://fresnostate.edu/president/strategic-plan> for more information.

**Click on this link to view the Strategic Priorities**

Access to classes  
 Curriculum and course redesign  
 Co-curricular and student support services promoting engagement and a sense of belonging  
 Not Applicable

**Check all that apply**

**How Does this Project Align to Strategic Priority One \* ?**  
Please refer to <http://fresnostate.edu/president/strategic-plan...> for more information.

Access to classes  
 Curriculum and course redesign  
 Co-curricular and student support services promoting engagement and a sense of belonging  
 Not Applicable

**To access the plan**  
**Check all that apply**

**How Does this Project Align to Strategic Priority Two \* ?**  
Please refer to: <http://fresnostate.edu/president/strategic-plan...> for more information.

Training, leadership, and professional development  
 Fair compensation to include salary, benefits, and workload  
 Recruitment  
 Onboarding  
 Strategically develop faculty and staff to support student success  
 Aspire to achieve Chronicle of Higher Education's "Great Colleges to Work For" designation  
 Strengthen culture of fairness, respect, diversity, and shared governance  
 Not Applicable

**Check all that apply**

**How Does this Project Align to Strategic Priority Three \* ?**  
Please refer to: <http://fresnostate.edu/president/strategic-plan...> for more information.

Modernize and upgrade existing facilities and infrastructure  
 Plan for new facilities and spaces to support enrollment growth  
 Embrace technology to support innovation, teaching and learning  
 Implement innovative parking and transportation strategies  
 Build and operate a healthier, more sustainable campus environment  
 Not Applicable

**Check all that apply**

**How Does this Project Align to Strategic Priority Four \* ?**  
Please refer to: <http://fresnostate.edu/president/strategic-plan...> for more information.

Support the Central Valley Promise outcomes  
 Increase campus-community connections through service-learning, internships, short courses, etc.  
 Plan and launch a comprehensive campaign to support campus strategic priorities  
 Not Applicable

**Check all that apply**

**If this project is not done, what is the Impact to the University, College, or Department? \* ?**  
Describe in as much detail as possible what the impact is

**Provide as much detail as possible**

**Is initial funding secured for this project? \***  
 Yes  
 No  
 Not Required / Not Applicable

**Check one**

**Are there funds for ongoing maintenance and support? \* ?**  
Example: License Fees, Upgrade Services, Support Fees, etc. Please Scroll to top of page to Save this request

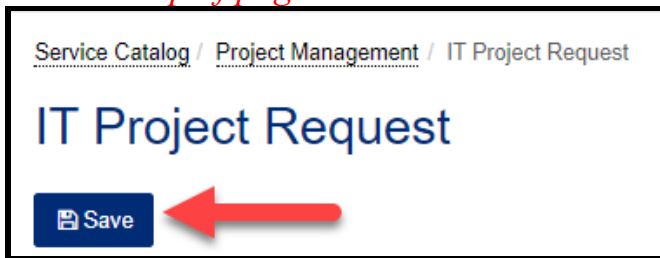
Yes  
 No  
 Not Required / Not Applicable

**Check one**

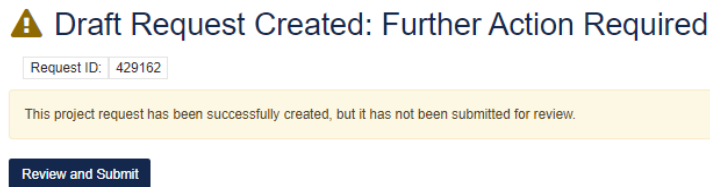


- 2) When you get to the end of the form, Scroll up to the top of the form and Click Save.
  - a. After you click save you will have an opportunity to review the information you entered before you submit the form.
  - b. You will also have the opportunity to upload files after you click Save.

*Scroll to top of page and click Save*



- 3) After clicking save you will see the next screen. Click review and submit if the request is completed:



## Submitting a Project Request

- 4) After clicking review and submit, you can review and adjust the information you entered. Scroll through the screen to review your information. You also have the option of exiting the form after saving without submitting. You can edit or complete it at a later date or time.

\*Note that a checkmark appears next to the sections as you mark them complete.

Services / Project Requests / test for guide / General

test for guide

Request ID: 407117

Business Case

**General**

Files

Time Types

Role Forecasts

Resources

Risks Register

Review and Submit

Mark Complete Save

Requestor Name \*

Liz Gonzalez

Division Delegate \* ⓘ

Please select your Division Delegate for the project.

- Diana Ralls - President's Office
- Kathleen Scott - Administration and Finance
- Leticia Cano - Advancement
- Malisa Lee - Student Affairs and Enrollment Management
- Robert Guinn - Campus-Wide
- Robert Guinn - Technology Services

Not Submitted

+ Show Help - Hide Help

1) From the General section, you can review the information you entered and modify if necessary.

2) After review and adjustments, click the "Mark Complete" button. This completes the General section only.

- 5) You can add files to provide clarification, additional instructions, diagrams, etc. You can either click the Add Attachments button or you can “drag and drop” the files.

Services / Project Requests / test for guide / Files

test for guide

Request ID: 407117

Business Case

General

**Files**

Time Types

Role Forecasts

Resources

Risks Register

Review and Submit

Mark Complete Add Attachments

Not Submitted

1) Click on the Files section

2) You can Add Attachments by clicking the button or you can Drag and Drop the attachments

3) Click the "Mark Complete" button. If no files are attached, just Mark Complete.

Drag and drop attachments here to upload.  
A maximum of 4 MB can be uploaded at once.

Attach any files you think would be useful in the evaluation of this project request. Examples would be an additional business case document or a customer feedback form.

- 6) Mark the next two sections complete per following instructions:

Services / Project Requests / test for guide

test for guide

Request ID: 407117

Business Case

- General
- Files
- Time Types**
- Role Forecasts
- Resources
- Risks Register
- Review and Submit

1) Click on Time Types section and "Mark Complete." The Time types are a PMO defined default

2) click on Role Forecasts section and "Mark Complete." The Roles will be added by the Project Manager if the project is approved.

Mark Complete Save

Time Type	Account	Billable	Capitalize	Time Off	Delete
Administrative Time	1008	False	False	False	Delete
Business Analysis	1001	True	True	False	Delete
Consulting	1011	False	False	False	Delete
Feasibility Analysis	1002	False	False	False	Delete

Not Submitted

7) You can skip the Resources and Risks Register sections. No need to mark those complete.

Click the Review and Submit section per following instructions:

Services / Project Requests / test for guide

test for guide

Request ID: 407117

Business Case

- General
- Files
- Time Types
- Role Forecasts
- Resources
- Risks Register
- Review and Submit

1) At this point you can go back to any section and update if required

2) Click the "Submit" button.

Submit Print

General

Account/Department  
DeputyChief Information Office

Service  
Project Management / Technology Services Project Request

Priority  
Low

Requestor  
EG Elizabeth Gonzalez  
lizgonzalez@csufresno.edu

Sponsor  
Elizabeth Gonzalez

Not Submitted

8) . \*Note, once you submit the form, you will no longer be able to make changes, unless the form is returned to you by the PMO for additional information.

You will get the following message. You can view the request you just submitted by clicking the first link.

Request Submitted Successfully!

Request ID: 407117

What do you want to do now?

- [View the request you just submitted](#)
- [View the service catalog](#)
- [View other requests](#)

## After Submitting the Form

- 1) When the form is submitted it is automatically assigned into an approvals workflow. The approver in the first step of the workflow is a Division Delegate and responsible for approving or denying your Divisions project requests.

It is best if the Division Delegate is aware of the project that you are submitting and usually speeds up the approvals process.

The following workflow is built into the IT Project Request process:

## Workflow Steps

PROJECT REQUEST PROCESS			
Step	Status	Process	Responsibility
1	Initiation Approval	Waiting for the Division Delegate to review and approve or reject this step.	Division Delegate
2	Initial PMO Review	Sponsor has approved the project request. The Project Mangement Office is reviewing the request. The PMO can return the request to the requestor for additional information. The PMO can also decline the request if not complete, if it does not align to a strategic priority or if funding is required but not secured.	PMO
3	Assign to Business Analyst Requirements Gathering	The PMO has assigned a Business Analyst. The BA will document the requiremenets. The BA will contact the requestor to get additional high level requirements.	Business Analyst
4	Follow-Up review with PMO	The PMO reviews the request, requirements and scope. The BA clarifies any questions or asked to get additional information to support the project request. The PMO rates the project using the PMO project rating criteria.	PMO
5	Capacity Review	Pmo conducts high level feasibility analysis, IT readiness and resource availability	PMO
6	Final Approval	IT Advisory Board reviews the requirements, rates the project and prioritizes. Final prioritization is reviewed by Cabinet.	Advisory Committee

## HOW TO VIEW YOUR PROJECT REQUESTS

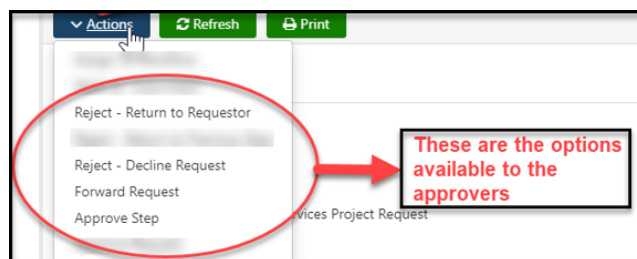
After submitting your project request, you can check the status of your request using the following steps:

- From the Services menu, click on Project Requests.
- You will see a list of all active projects and the status of those projects.
- You can also search by ID number or on closed project requests.

ID	Request	Acct/Dept	Service	Reviewer	Status	Modified
374251	3/22 test for Division Delegate	DeputyChief Information Office	Project Management / IT Project Request		Not Submitted	Fri 3/22/19 11:38 AM
374286	3/27 FOR REQUESTORS	DeputyChief Information Office	Project Management / IT Project Request		Not Submitted	Wed 3/27/19 2:29 PM
373476	Feb 8 testing	DeputyChief Information Office	Project Management / IT Project Request		Not Submitted	Tue 2/12/19 5:14 PM
373498	Jan 12 Test	DeputyChief Information Office	Project Management / IT Project Request		Declined	Tue 2/12/19 5:15 PM
373643	test 2/14	DeputyChief Information Office	Project Management / IT Project Request		Cabinet Approval	Fri 3/22/19 11:43 AM

## Division Delegate Approval

The Division Delegate can perform the following actions for each Project Request:



- a. Reject a Request and return to the requestor– Return to Previous Step (with comments)
  - This causes the request to return to the Requestor with a status of rejected. The Division delegate will include comments regarding the rejection. The Requestor can re-submit if more information is required.
- b. Reject – Decline the Request: The Division Delegate is not approving the project request. Requestor will need to negotiate with the Division Delegate and can re-submit the request if approved to do so.
- c. Forward Request
  - The Division Delegate can forward the Request to another person. That person will receive an email notification to provide additional information. The request stays in the Division Delegate’s workflow step.
- d. Approve Step
  - The Request is approved to move forward in the workflow.

- 1) If the Request is approved, the PMO reviews and will assign someone to conduct the high-level Business Analysis and Requirements Gathering in the next step.
- 2) The Analyst may need to call the requestor to get high-level business requirements and additional information about the project before reviewing their findings with the PMO.
- 3) The Analyst will upload any business requirements, additional business case documentation or other supporting documentation.
- 4) The Analyst will then approve this step, return to previous step or forward to another person for additional information. The form stays in its' current workflow step until the Analyst performs and action.
- 5) The Analyst will conduct a Follow-Up review with the PMO. The PMO may provide additional documentation, instructions or other high-level details.
- 6) The Deputy CIO and the IT Advisory Committee will review, rate, score and prioritize projects. Final prioritization will be presented to Cabinet for review.

## **More information about the Technology Services Project Management Office, (PMO)**

If you would like more information about the PMO, please visit our website.

[Technology Services PMO](#)

The PMO contact information is also on the main page of our website. Feel free to provide feedback or call for help.