FRESNO STATE
Discovery. Diversity. Distinction.

TeamDynamix
IT PROJECT REQUESTS
How to submit a request

Contents

FRESNO STATE
Discovery. Diversity. Distinction.

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

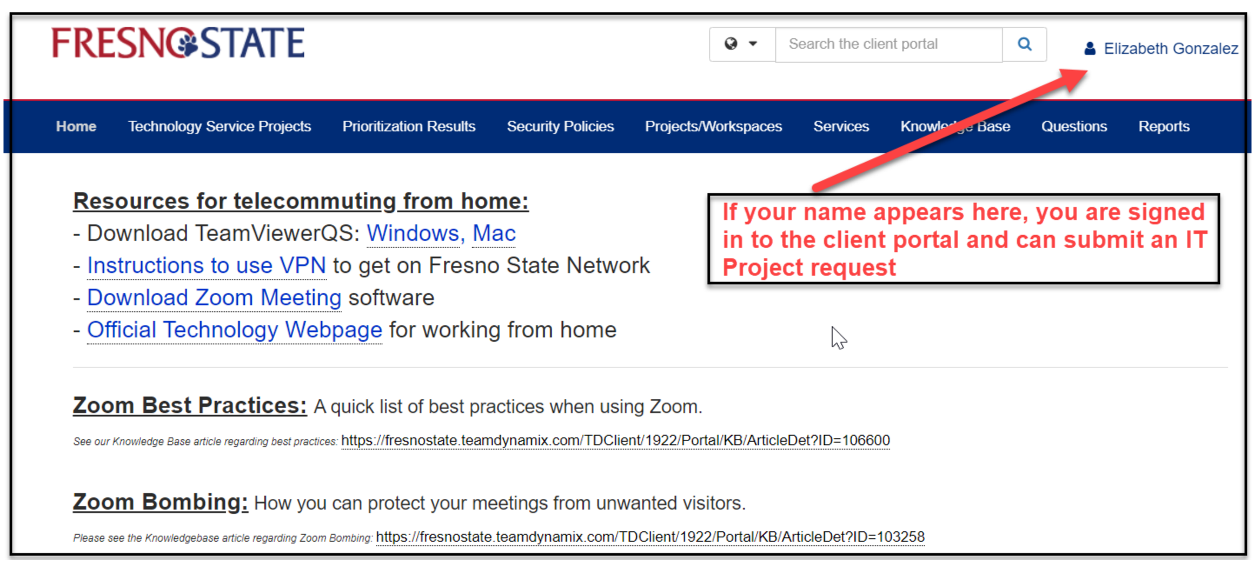
TeamDynamix is accessed by using your web browser to enter the site: https://fresnostate.teamdynamix.com.

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.

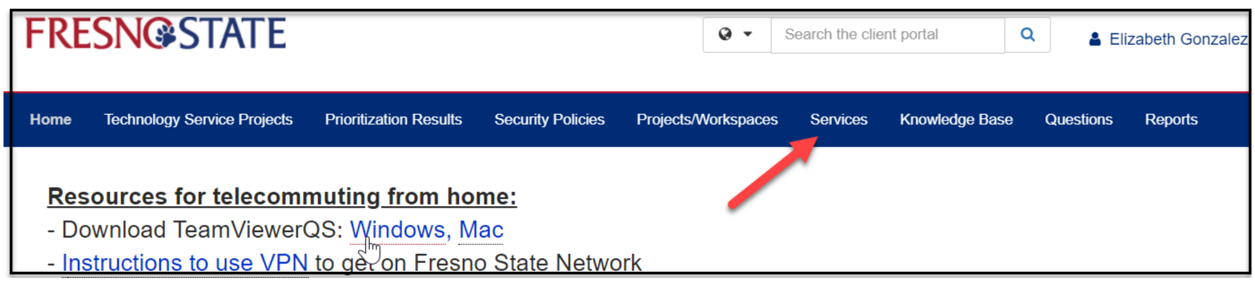


Accessing the Services Home Page

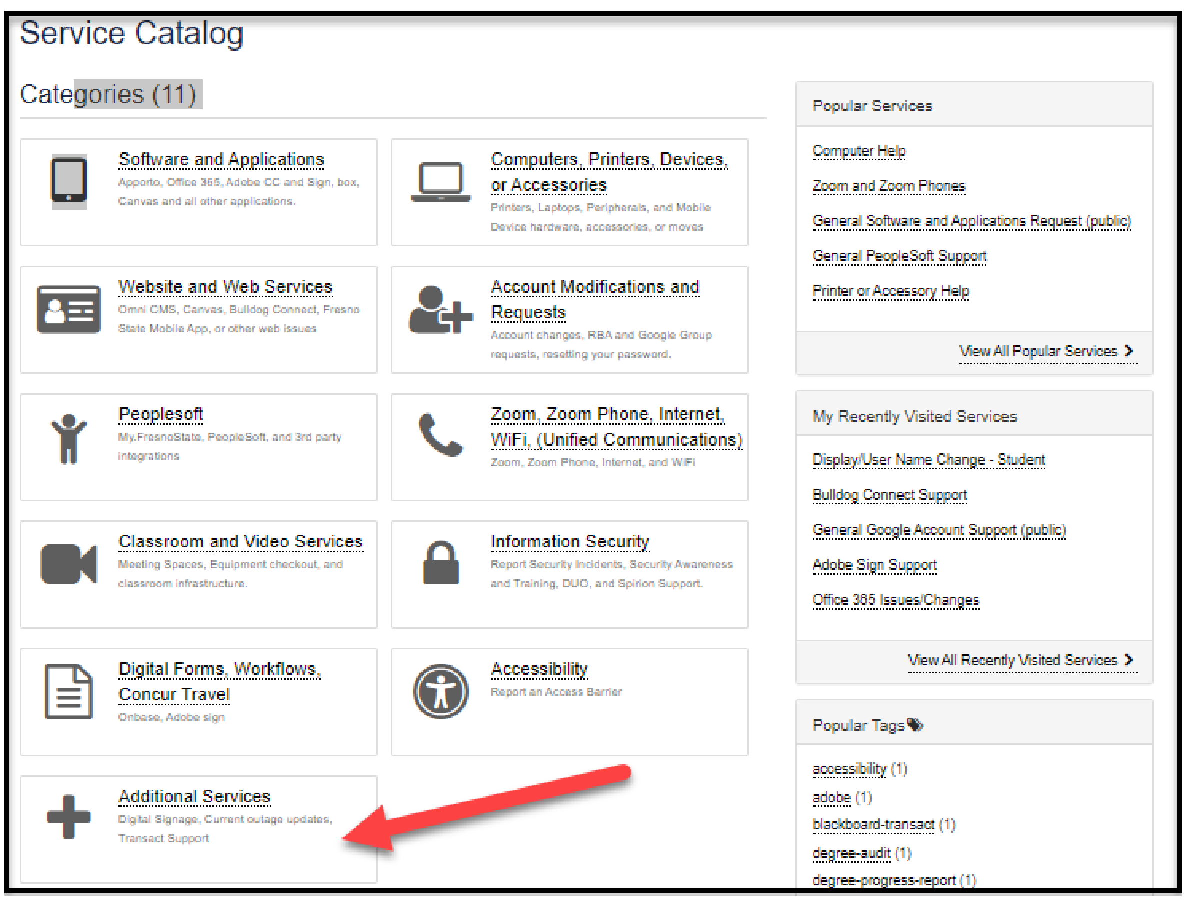
Once you're signed in, you will be directed to the Service Catalog home page. The Service Catalog lists the different types of requests you can submit to Technology Services.

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

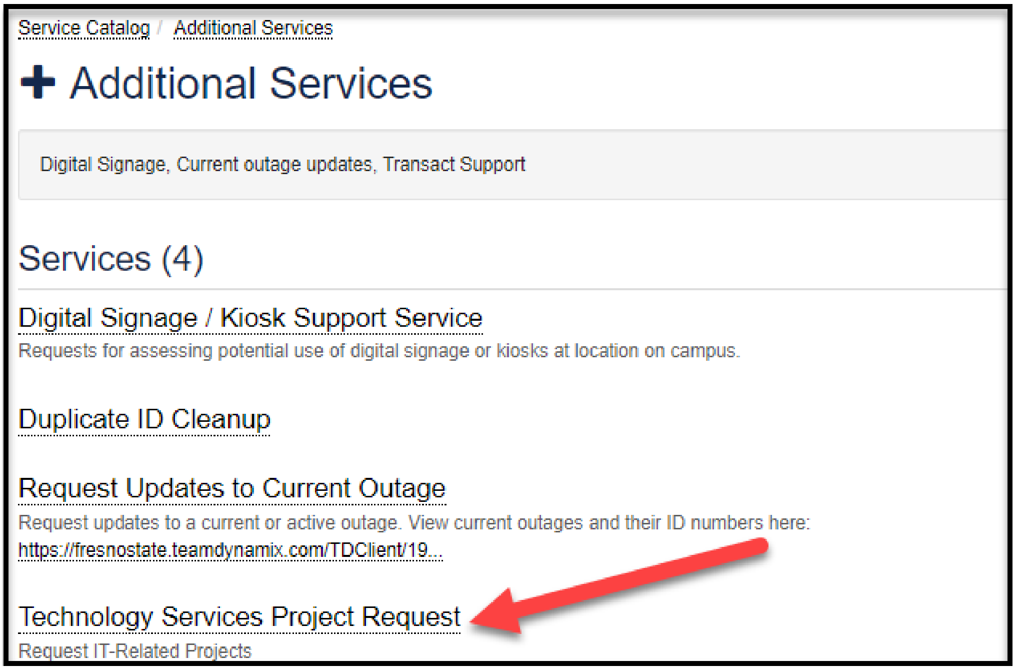
1) Click on the Services tab.



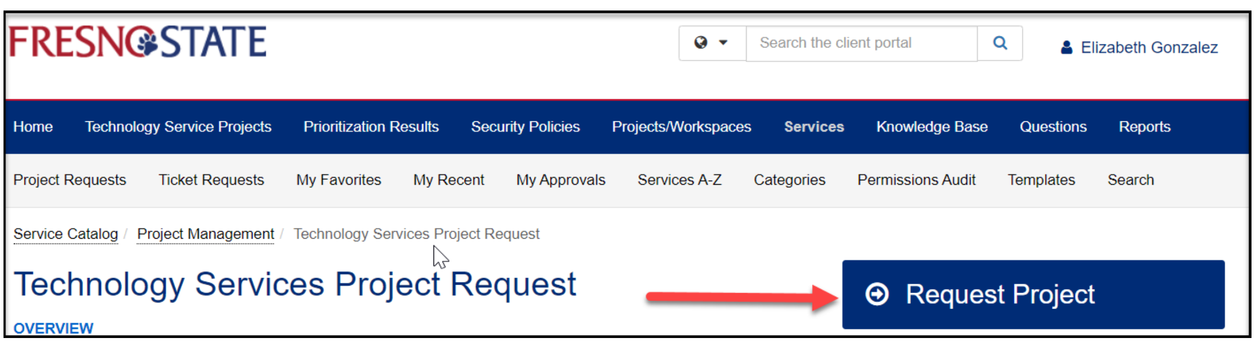
2) Click on the Additional Services button to access the project request link.



3) Click on the Technology Services Project Request link:

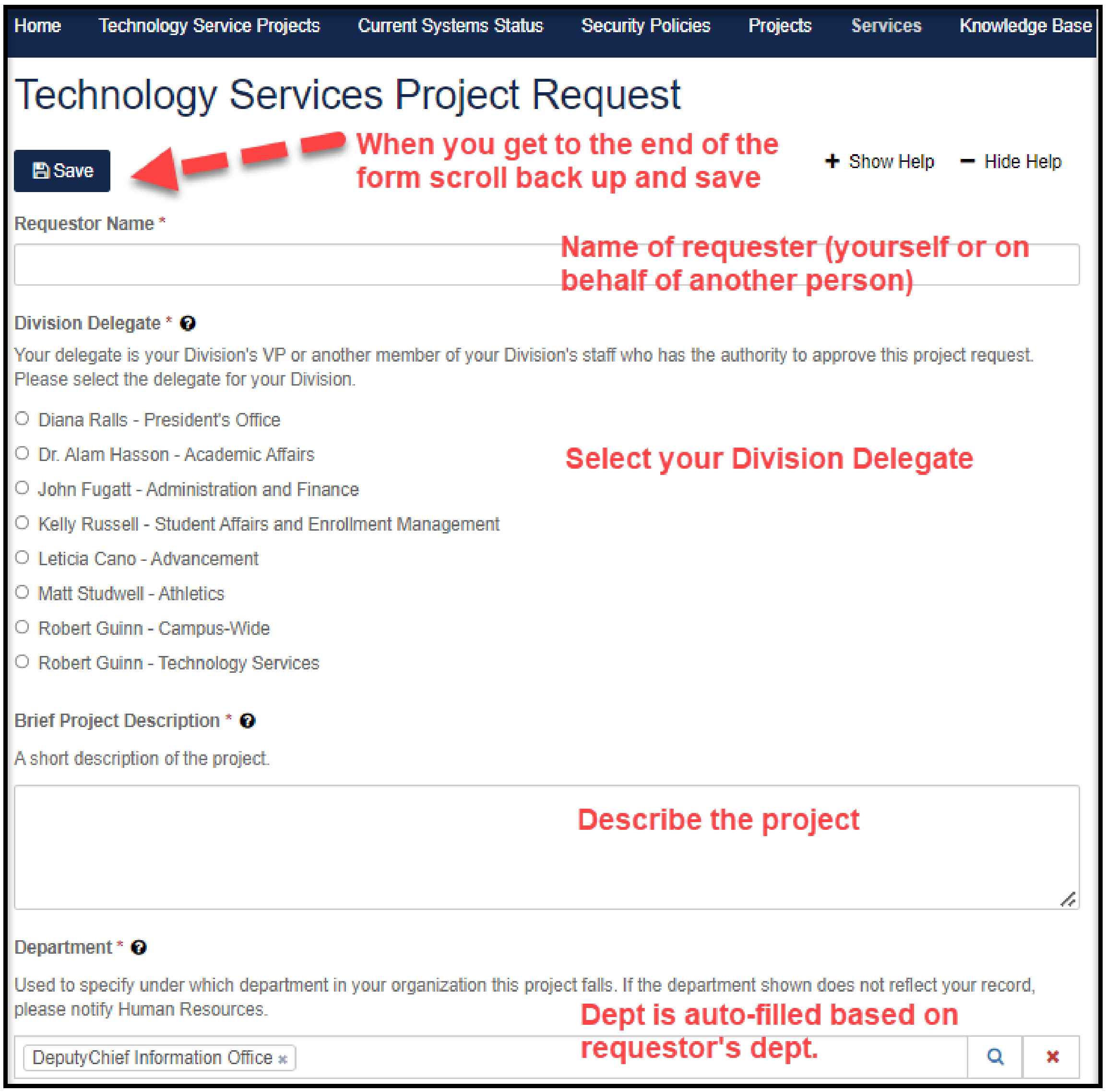


4) Click on the Request Project button:



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.



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 *

Click on this link to view the Strategic Priorities

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

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

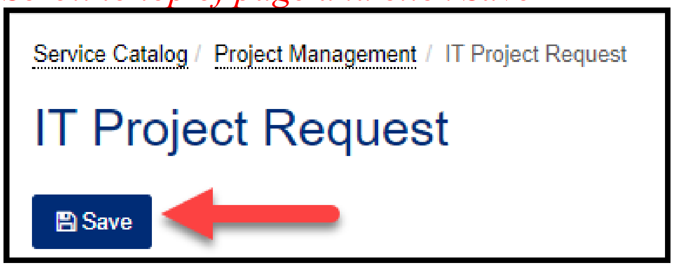
Are there funds for ongoing maintenance and support? *
Example: License Fees, Upgrade Services, Support Fees, etc. Please Scroll to top of page to Save this request

- ○ Yes
- ○ No
- ○ Not Required / Not Applicable

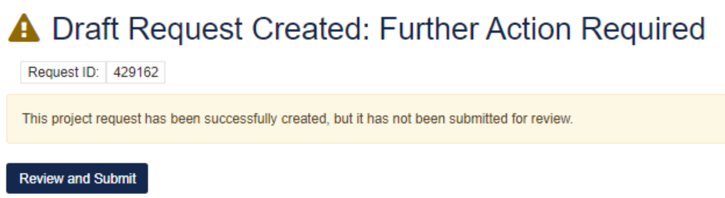
Check one

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



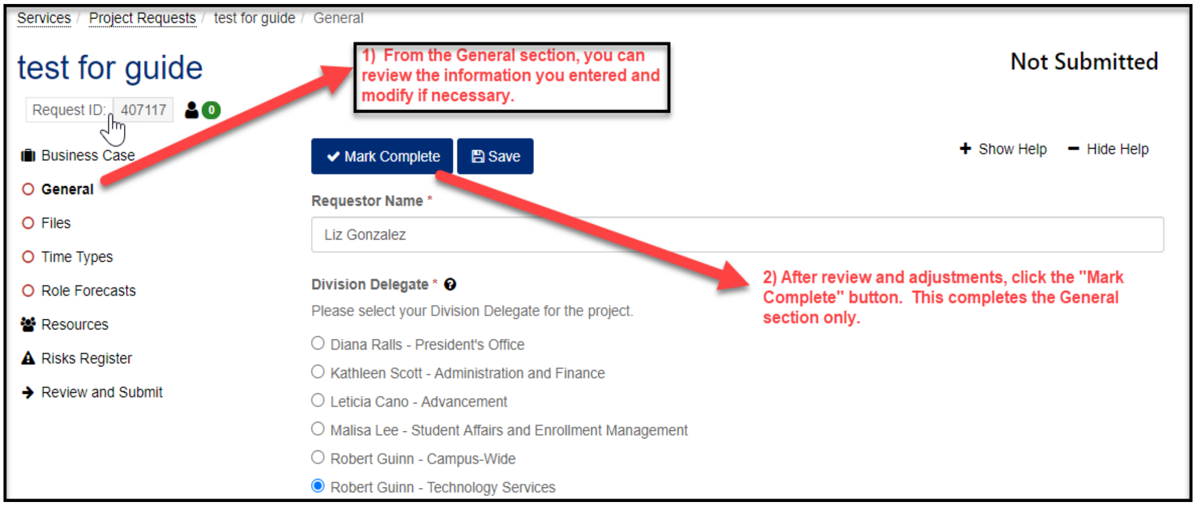
3) After clicking save you will see the next screen. Click review and submit if the request is completed:



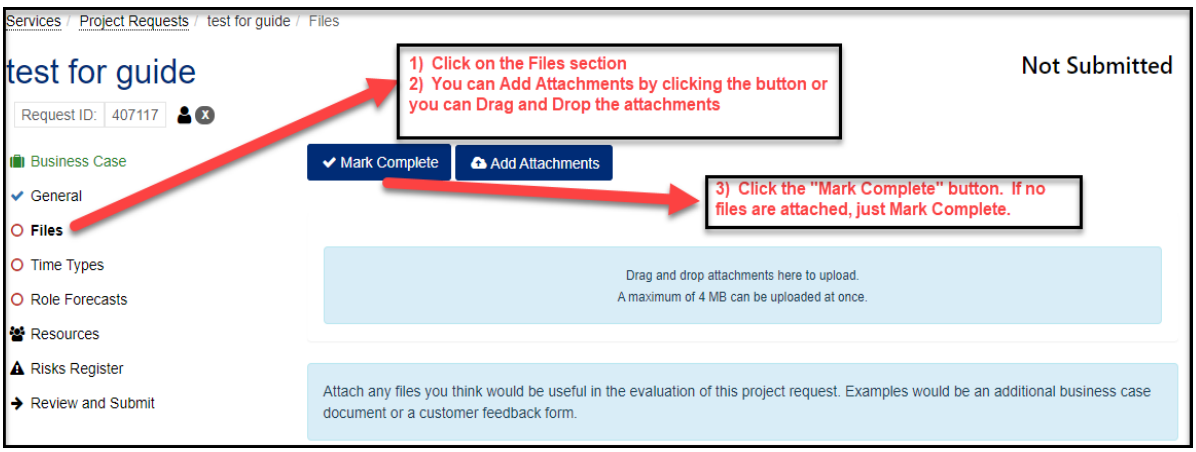
Submitting a Project Request

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.

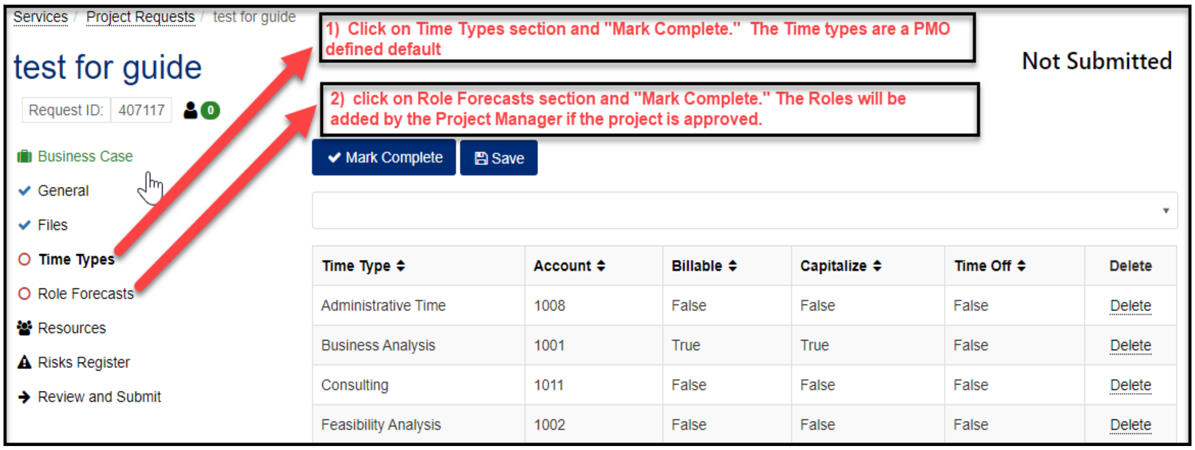
   *Note that a checkmark appears next to the sections as you mark them complete.



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.

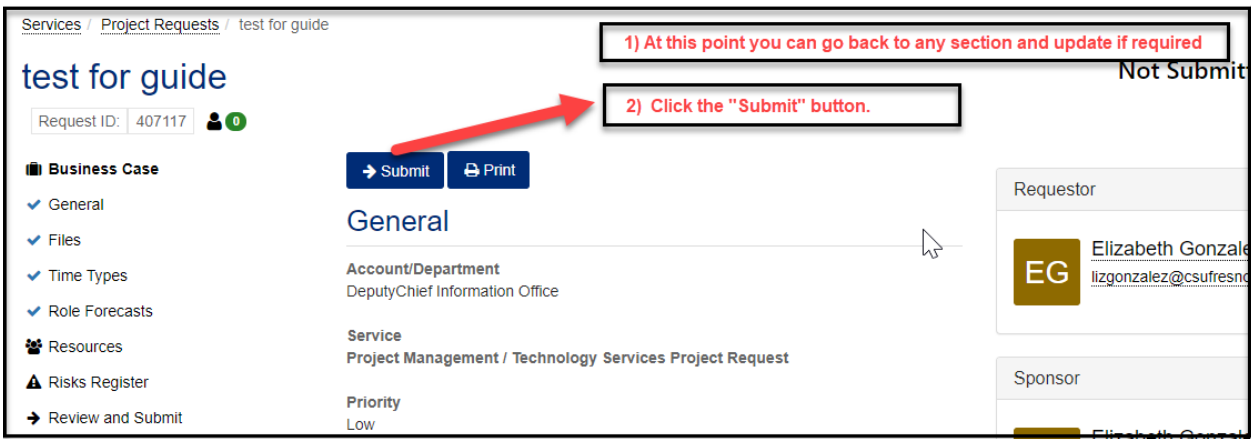


6) Mark the next two sections complete per following instructions:



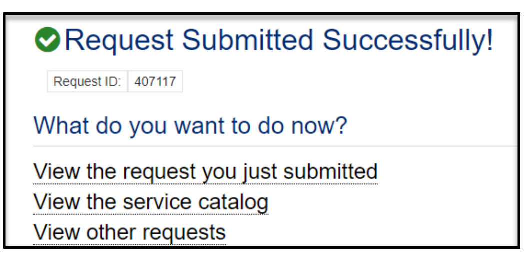
7) You can skip the Resources and Risks Register sections. No need to mark those complete.

Click the Review and Submit section per following instructions:



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.



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:

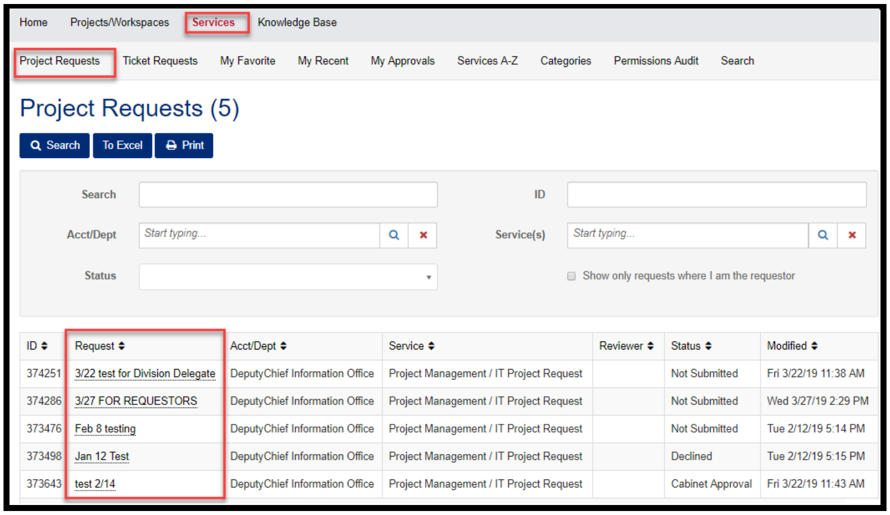
Workflow Steps

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.



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.