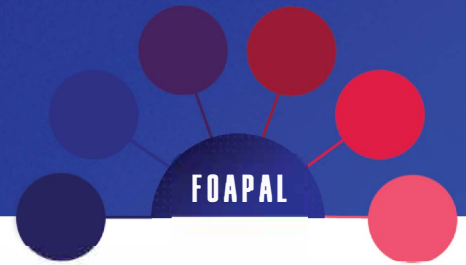


Team Dynamix (Chart Element Request)



FOAPAL job aids assume familiarity with current software and processes used on campus. They are designed to highlight changes brought about by the introduction of FOAPAL strings.

USE

To create, update, close or otherwise maintain FOAPAL string information.

Users can submit Team Dynamix tickets through the online portal at:
<https://udayton.teamdynamix.com/TDClient/Requests/ServiceDet?ID=34788>

FOAPAL RELATED CHANGES

Team Dynamix Functions	FOAPAL Change
1. Fund Maintenance	One ticket request type; budget manager approval

FUND MAINTENANCE

Previously, users could submit one of three ticket types: Request New Fund, Existing Fund/User Role Change Request, or Deactivate Fund. Request New Fund would allow users to ask for new funding to be created and assign individuals access to the new fund, as well as name approver and requestor roles. Existing Fund/User Role Change Request would allow users to modify who has access to a particular fund. Deactivate Fund would allow users to remove a fund. Please see Figure 1 (below) for details on the old Team Dynamix Fund Maintenance page:

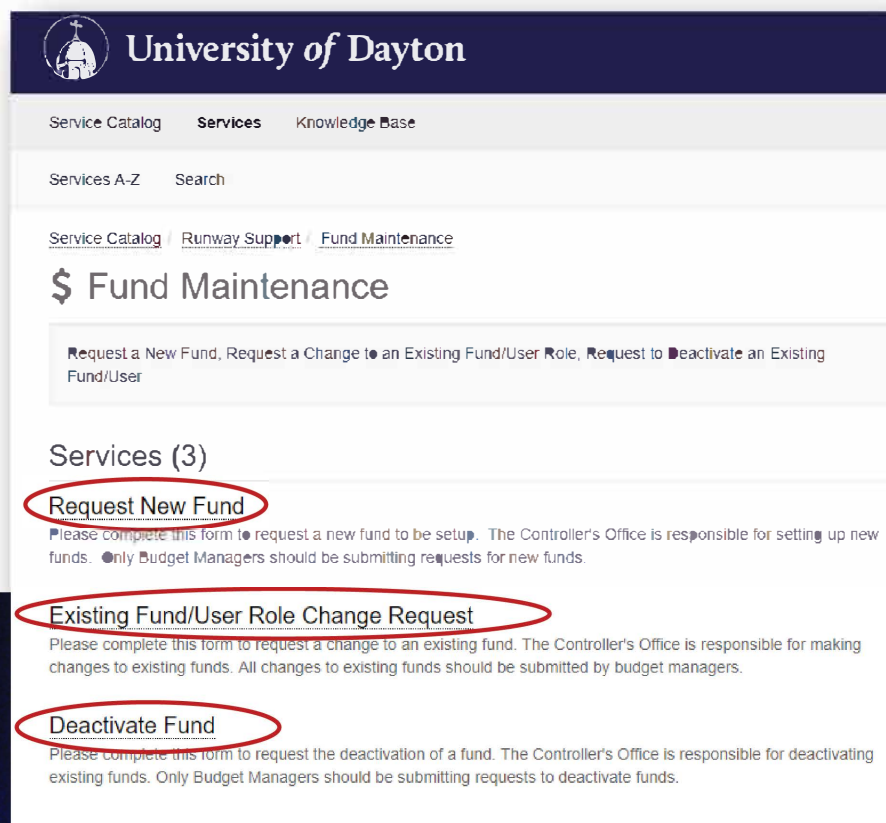
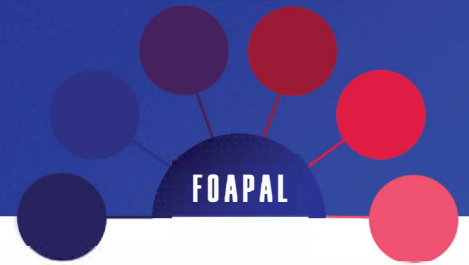


Figure 1: Team Dynamix (old), Fund Maintenance page w/three ticket types

Team Dynamix (Chart Element Request)



The Team Dynamix page now only has one “service” in the portal. In addition, actions within are no longer referred to as “Fund Maintenance”. Instead, actions are referred to as “Chart Elements Request”. From the portal users can select the red “Request This” button to enter the request page. See Figure 2 for details.

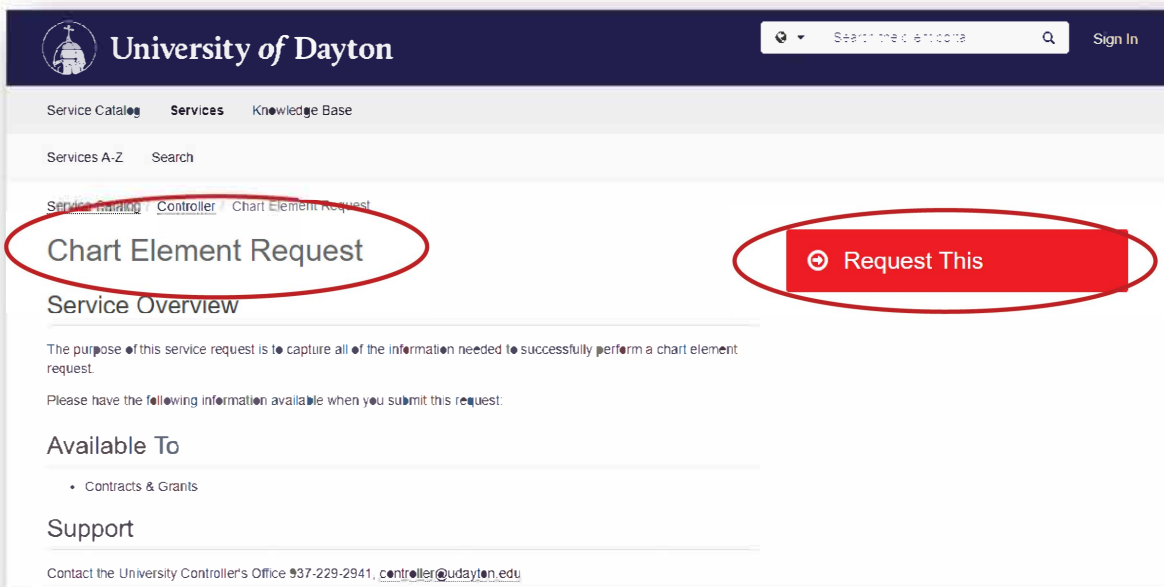


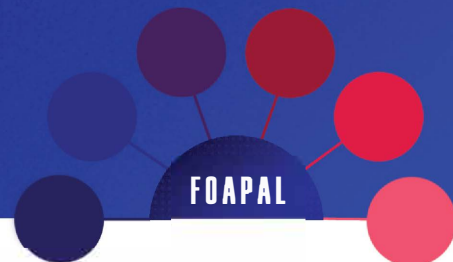
Figure 2: Team Dynamix (new), Chart Element Request portal w/ “Request This” button

Once the “Request This” button is selected, users will move to the Chart Element Request screen (see Figure 3, below) and will be required to fill in some information before making the request. Provided they’ve signed in using UD credentials, the Requestor and Acct/Dept fields will be auto-populated with users’ information. Users will Select Division/Budget Manager and Chart element request type from the dropdown menus.

Note: only UDRI employees will select the “UDRI Admin” type of element request from the Chart element request type field. The Enter Additional Information field can be used to add information not covered in the dropdown fields.

Note: Unit Budget Managers now have the ability to approve or reject Chart Element Requests.

Team Dynamix (Chart Element Request)



Requestor * ⓘ

Start typing... 🔍 ✕

Requestor is required.

Acct/Dept * ⓘ

Start typing... 🔍 ✕

Acct/Dept is required.

Select Division/Budget Manager *

Chart element request type * ⓘ

Please attach any gift agreements, program brochures email documentation or anything that will be helpful in determining necessary additions or maintenance of FOAPAL elements

📎

Browse... No file chosen

Enter Additional Information ⓘ

Request

When complete, users will select the “Request” button at the bottom of the form.