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.

FOAPAL RELATED CHANGES

<table>
<thead>
<tr>
<th>Team Dynamix Functions</th>
<th>FOAPAL Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Fund Maintenance</td>
<td>One ticket request type; budget manager approval</td>
</tr>
</tbody>
</table>

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

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:

For questions please contact the Office of the Controller at 937-229-2941.
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.

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.

For questions please contact the Office of the Controller at 937-229-2941.
When complete, users will select the “Request” button at the bottom of the form.