OTS PROJECT REQUEST
CLIENT PORTAL: USER GUIDE
Table of Contents

INTRODUCTION ........................................................................................................2
GETTING STARTED .................................................................................................2
CREATING A PROJECT REQUEST ...........................................................................2
CHECKING THE STATUS OF SUBMITTED PROJECT REQUESTS ...................5
ADDITIONAL CLIENT PORTAL FEATURES ..........................................................6
Before completing the online form, you must have approval from your Dean or AVP.

INTRODUCTION
The OTS project request client portal is used to submit online technology-related project requests to the OTS Project Management Office (PMO). Project requests are potential projects that are being evaluated and will eventually (if approved) graduate into a project.

This user guide will provide instructions on how to submit a project request using the OTS client portal.

GETTING STARTED
The OTS Project Request Client Portal can be found at: https://towson.teamdynamix.com/TDCClient/Requests/ServiceDet?ID=6880

A user account is required in order to submit an OTS project request. Once you have an account, you will sign in using your Towson University NetID to submit and track project requests.

To request an account, please contact the Project Management Office.

CREATING A PROJECT REQUEST
1. Click on the green “Project Request Form” button.
2. You will be prompted to sign in with a valid NetID and password.
3. Complete all fields with necessary project details. Descriptions of each field is provided in the yellow box. * = Required fields
4. After completing all fields, click the “Mark Complete” button at the top of the page.
5. If you are not ready to submit the request, click the “Save” button to return at a later date and finish the request.

6. Click on “Files” under the Business Case.
7. Attach any files you think would be useful in the evaluation of this project request. (Browse>Upload).
8. Once files are uploaded, click the “Mark Complete” button.
9. Click on “Review and Submit.” Review the information on this page. Click on the “Submit” button to submit your request. Please note, once you click “Submit” you will no longer be able to edit your request.

10. You will get notification on screen that your project request was successfully submitted. After your request has been successfully submitted to the PMO, it will be presented at the next
Project Management Office Committee (PMOC) meeting for review. These meetings occur every two weeks, and you will be contacted after the meeting to be advised of next steps.

CHECKING THE STATUS OF SUBMITTED PROJECT REQUESTS

1. Sign into the OTS Project Request Client Portal.
2. Click on the “Project Requests” menu option at the top.
3. Project requests that you have submitted, requests on which you are the sponsor, requests for your department and requests for which you are marked as a stakeholder will be displayed. To
see only requests that you have submitted, check the “Show only requests where I am the requestor” option, then click the “Search” button.

4. Double-click on the name of the project request to view detailed information, including where the request is in the approval process workflow.

ADDITIONAL CLIENT PORTAL FEATURES

OTS is only utilizing the Projects and Knowledge Base features of the tool. Other tab options may appear, such as Calendar, but at this time they are not being used as part of the Project Management Tool.