Self-Help Guide

TeamDynamix (TDX): Work with Tickets

This self-help guide is for technicians working in TDX to track Incidents, Requests, Major Incidents, Problems, or Change tickets. Some articles linked below are only viewable to those who have technician access to TDX Client Portal.

Understand TDX

Getting Started in TDX

TDX Login

Log in to Users (TDNext)
/services-technologies/how-tos/tdx-log-in-users-tdnext
Log in to the Client Portal
/services-technologies/how-tos/tdx-log-in-client-portal
Move between User (TDNext) and the Client Portal
/services-technologies/how-tos/tdx-move-between-users-tdnext-client

Users (TDNext)

Understand Ticket Classifications
/services-technologies/how-tos/tdx-understand-ticket-classifications
Work with Parent/Child Ticket Relationships
/services-technologies/how-tos/tdx-work-parentchild-ticket
Use My Work Application
The Client Portal

Search the Knowledge Base

Search for an Access Request or Service Request form in the Client Portal

Working with Reports

TDNext Reports

TDX: Create and Manage Reports
https://it.umn.edu/services-technologies/self-help-guides/tdx-create-manage-rep...
This self-help guide walks you through the process of running, creating, and managing reports in TeamDynamix.

Using BeyondTrust Remote Support (Bomgar) with TDX

BeyondTrust TDX Integration

Learn about BeyondTrust Remote Support
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=3847
Set Up BeyondTrust Remote Support
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4859
Link Your Bomgar Account to TDX
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5474
Generate a BeyondTrust Remote Support Session Via a TDX Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5475

Work with Incidents and Requests
Working with Tickets

Incident Tickets

Create an Incident Ticket
/services-technologies/how-tos/tdx-incident-create-incident-ticket

Write Clear, Short Titles for Tickets
/services-technologies/how-tos/tdx-write-clear-short-titles-tickets

View Ticket Details
/services-technologies/how-tos/tdx-incident-view-ticket-details

Edit a Ticket
/services-technologies/how-tos/tdx-incident-edit-ticket

Work a Ticket
/services-technologies/how-tos/tdx-incident-work-ticket

Find the Correct Responsible Group for a Technician
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5635

Resolve a Ticket
/services-technologies/how-tos/tdx-incident-resolve-ticket

Work with Unique Requestors
/services-technologies/how-tos/tdx-work-unique-requestors

Service Request Tickets

Search for an Access Request or Service Request form in the Client Portal
/services-technologies/how-tos/tdx-request-search-access-request-or

Complete a Service Request Form on Behalf of a User (OIT User Support)
/services-technologies/how-tos/tdx-request-complete-service-request

Send a Request Form and Document the Interaction (OIT User Support)
/services-technologies/how-tos/tdx-request-send-request-form-document

Send a Request Form
/services-technologies/how-tos/tdx-requests-send-request-form

Check the Status of a Service Request for a User
/services-technologies/how-tos/tdx-request-check-status-service-request

Handle a Generic Request
/services-technologies/how-tos/tdx-request-handle-generic-request

Handle a Password Reset Request (OIT User Support--requires login)
Ticket Templates

Create a Ticket Template
/services-technologies/how-tos/tdx-create-ticket-template
Manage a Ticket Template
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5388
Track Miscellaneous User Situations (OIT User Support)
/services-technologies/how-tos/tdx-track-miscellaneous-user-situations

Working on Open Tickets

Basic Actions

Take Responsibility for a Ticket
/services-technologies/how-tos/tdx-take-responsibility-ticket
Edit a Ticket
/services-technologies/how-tos/tdx-incident-edit-ticket
Change the Form Type of the Ticket
https://it.umn.edu/services-technologies/how-tos/tdx-incident-create-incident-t...
Add an Attachment to the Ticket
/services-technologies/how-tos/tdx-add-attachment-ticket
Relate an Asset to a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5446
Search for a Ticket
/services-technologies/how-tos/tdx-search-ticket
Find the Correct Responsible Group for a Technician
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5635

Ticket Communication

Communicate Through a Ticket
/services-technologies/how-tos/tdx-communicate-through-ticket
Write Complete Work Notes
/services-technologies/how-tos/tdx-oit-user-support-write-complete-work
Write Comments to Customers
Write Resolution Notes
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4844
Add People (Contacts) to a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
Transfer Ownership of a Ticket
/services-technologies/how-tos/tdx-transfer-ownership-ticket
Warm Transfer a Ticket (OIT User Support)
/services-technologies/how-tos/tdx-warm-transfer-ticket-oit-user

Knowledge Base

Associate a Knowledge Article with a Ticket
/services-technologies/how-tos/tdx-knowledge-associate-knowledge
Create a New Knowledge Article from a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5395
Send a Knowledge Base Article to a User
/services-technologies/how-tos/tdx-knowledge-send-knowledge-base

Work with Other Tickets and Tasks

Processing Major Incidents, Problems, and Change

Major Incident Tickets

Understand the Use of Major Incident Tickets
/services-technologies/how-tos/tdx-major-incident-understand-use-major
Create a Major Incident Ticket
/services-technologies/how-tos/tdx-major-incident-create-major-incident
Work a Major Incident Ticket
/services-technologies/how-tos/tdx-major-incident-work-major-incident
Resolve a Major Incident Ticket
/services-technologies/how-tos/tdx-major-incident-resolve-major
Work with Parent/Child Ticket Relationships
/services-technologies/how-tos/tdx-work-parentchild-ticket
Problem Tickets

Understand the Use of Problem Tickets
/services-technologies/how-tos/tdx-problem-understand-use-problem
Create a Problem Ticket
/services-technologies/how-tos/tdx-problem-create-problem-ticket
Work a Problem Ticket
/services-technologies/how-tos/tdx-problem-work-problem-ticket
Resolve a Problem Ticket
/services-technologies/how-tos/tdx-problem-resolve-problem-ticket
Work with Parent/Child Ticket Relationships
/services-technologies/how-tos/tdx-work-parentchild-ticket

Change Tickets

Understand the Change Process
/resources-it-staff-partners/change-management/change-process
Fill out a Change Ticket
/services-technologies/how-tos/tdx-change-fill-out-submit-change-ticket

Using Ticket Tasks

Ticket Tasks

Create a Ticket Task
/services-technologies/how-tos/tdx-create-ticket-task
Edit a Ticket Task You Created
https://it.umn.edu/services-technologies/how-tos/tdx-create-ticket-task#editing
View Your Group's Ticket Tasks
https://it.umn.edu/services-technologies/how-tos/tdx-work-ticket-task#viewing
Take Responsibility for a Ticket Task
https://it.umn.edu/services-technologies/how-tos/work-ticket-task#taking
Work a Ticket Task
https://it.umn.edu/services-technologies/how-tos/tdx-work-ticket-task#working
Reassign a Ticket Task
https://it.umn.edu/services-technologies/how-tos/work-ticket-task#reassigning
Complete a Ticket Task
https://it.umn.edu/services-technologies/how-tos/work-ticket-task#completing