University of Minnesota

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

/services-technologies/how-tos/tdx-use-my-work-application

Create and Manage a Desktop

/services-technologies/how-tos/tdx-create-manage-desktop

Use the People App

/services-technologies/how-tos/tdx-use-people-app

Manage Groups in the People App

/services-technologies/how-tos/tdx-manage-groups-in-people-app

The Client Portal

Search the Knowledge Base

/services-technologies/how-tos/tdx-knowledge-search-knowledge-base

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

/services-technologies/how-tos/tdx-request-search-access-request-or

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
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5414
Work with Unique Requestors
/services-technologies/how-tos/tdx-work-unique-requestors
Mitigate Bouncing Tickets
/services-technologies/how-tos/tdx-incident-mitigate-bouncing-tickets

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)

https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5407

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

https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5391

Write Complete Work Notes
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=3980
Write Comments to Customers
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4844
Write Resolution Notes
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
Add People (Contacts) to a Ticket
/services-technologies/how-tos/tdx-add-people-contacts-ticket
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

https://atlas.umn.edu/it-umn/change-process-0

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