

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)

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5374>

Log in to the Client Portal

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5376>

Move between User (TDNext) and the Client Portal

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5377>

Users (TDNext)

Understand Ticket Classifications

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5381>

Work with Parent/Child Ticket Relationships

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5382>

Use My Work Application

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5379>

Create and Manage a Desktop

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5378>

Use the People App

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=6250>

Manage Groups in the People App

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=6483>

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5403>

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5410>

Write Clear, Short Titles for Tickets

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5476>

View Ticket Details

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5411>

Edit a Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5412>

Work a Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5413>

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5415>

Mitigate Bouncing Tickets

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=6378>

Service Request Tickets

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5403>

Complete a Service Request Form on Behalf of a User (OIT User Support)

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5404>

Send a Request Form and Document the Interaction (OIT User Support)

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5405>

Send a Request Form

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5406>

Check the Status of a Service Request for a User

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5408>

Handle a Generic Request

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5402>

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5387>

Manage a Ticket Template

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5388>

Track Miscellaneous User Situations (OIT User Support)

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5380>

Working on Open Tickets

Basic Actions

Take Responsibility for a Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5390>

Edit a Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5412>

Change the Form Type of the Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5410#changing>

Add an Attachment to the Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5393>

Relate an Asset to a Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5446>

Search for a Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5384>

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5392>

Transfer Ownership of a Ticket

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5398>

Warm Transfer a Ticket (OIT User Support)

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5397>

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5382>

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5382>

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

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5449>

Edit a Ticket Task You Created

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5449#editing>

View Your Group's Ticket Tasks

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5450#viewing>

Take Responsibility for a Ticket Task

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5450#taking>

Work a Ticket Task

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5450#working>

Reassign a Ticket Task

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5450#reassigning>

Complete a Ticket Task

<https://tdx.umn.edu/TCClient/31/Portal/KB/ArticleDet.aspx?ID=5450#completing>