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
Create and Manage a Desktop
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5379

Use the People App
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5378

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
Write Clear, Short Titles for Tickets
[https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5476](https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5476)
View Ticket Details
Edit a Ticket
Work a Ticket
Find the Correct Responsible Group for a Technician
Resolve a Ticket
[https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5414](https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5414)
Work with Unique Requestors
Mitigate Bouncing Tickets

**Service Request Tickets**

Search for an Access Request or Service Request form in the Client Portal
Complete a Service Request Form on Behalf of a User (OIT User Support)
Send a Request Form and Document the Interaction (OIT User Support)
Send a Request Form
Check the Status of a Service Request for a User
Handle a Generic Request
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5408
Handle a Password Reset Request (OIT User Support--requires login)
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?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.aspx?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.aspx?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.aspx?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.aspx?ID=5635

Ticket Communication

Communicate Through a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet.aspx?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
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/TDClient/31/Portal/KB/ArticleDet.aspx?ID=5450#completing