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-reports
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  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
Warm Transfer a Ticket (OIT User Support)  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878

Knowledge Base

Associate a Knowledge Article with a Ticket  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
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  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5395

Work with Other Tickets and Tasks

Processing Major Incidents, Problems, and Change

Major Incident Tickets

Understand the Use of Major Incident Tickets  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
Create a Major Incident Ticket  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
Work a Major Incident Ticket  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
Resolve a Major Incident Ticket  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
Work with Parent/Child Ticket Relationships  
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=4878
**Problem Tickets**

Understand the Use of Problem Tickets
[/services-technologies/how-tos/tdx-problem-understand-use-problem](/services-technologies/how-tos/tdx-problem-understand-use-problem)

Create a Problem Ticket
[/services-technologies/how-tos/tdx-problem-create-problem-ticket](/services-technologies/how-tos/tdx-problem-create-problem-ticket)

Work a Problem Ticket

Resolve a Problem Ticket

Work with Parent/Child Ticket Relationships
[/services-technologies/how-tos/tdx-work-parentchild-ticket](/services-technologies/how-tos/tdx-work-parentchild-ticket)

**Change Tickets**

Understand the Change Process
[/resources-it-staff-partners/change-management/change-process](/resources-it-staff-partners/change-management/change-process)

Fill out a Change Ticket

**Using Ticket Tasks**

**Ticket Tasks**

Create a Ticket Task
[/services-technologies/how-tos/tdx-create-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](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](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](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](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](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