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

Use Reports
Standard Reports Planned for TeamDynamix
Run Existing Reports
Modify Existing Reports
Export Existing Reports
Add a Report to a Desktop

Using BeyondTrust Remote Support (Bomgar) with TDX

BeyondTrust TDX Integration

Learn about BeyondTrust Remote Support
Set Up BeyondTrust Remote Support
Link Your Bomgar Account to TDX
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
Check the Status of a Service Request for a User

Handle a 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
Create a Ticket Template
Manage a Ticket Template
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5388
Track Miscellaneous User Situations (OIT User Support)

Working on Open Tickets

Basic Actions

Take Responsibility for a Ticket
Take Responsibility for a Ticket
Edit a Ticket
Edit a Ticket
Change the Form Type of the Ticket
Change the Form Type of the Ticket
Add an Attachment to the Ticket
Add an Attachment to the Ticket
Relate an Asset to a Ticket
Relate an Asset to a Ticket
Search for a Ticket
Search for a Ticket
Find the Correct Responsible Group for a Technician
Find the Correct Responsible Group for a Technician
**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
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
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
Take Responsibility for a Ticket Task
https://it.umn.edu/services-technologies/how-tos/tdx-work-ticket-task#viewing

Work a Ticket Task
https://it.umn.edu/services-technologies/how-tos/work-ticket-task#taking

Reassign a Ticket Task
https://it.umn.edu/services-technologies/how-tos/tdx-work-ticket-task#working

Complete 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#completing