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
Create and Manage a Desktop

Use the People App

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-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
/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
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?ID=5388
Track Miscellaneous User Situations (OIT User Support)
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5446

Working on Open Tickets

Basic Actions
Take Responsibility for a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5446
Edit a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5635
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
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5635
Relate an Asset to a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5635
Search for a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5635
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=5635
Write Complete Work Notes
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  
Create a Problem Ticket  
Work a Problem Ticket  
Resolve a Problem Ticket  
Work with Parent/Child Ticket Relationships

Change Tickets

Understand the Change Process  
Fill out a Change Ticket

Using Ticket Tasks

Ticket Tasks

Create a Ticket Task  
Edit a Ticket Task You Created  
View Your Group's Ticket Tasks  
Take Responsibility for a Ticket Task  
Work a Ticket Task  
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