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
Manage Groups in 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
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
Set Up BeyondTrust Remote Support
Link Your Bomgar Account to TDX
Generate a BeyondTrust Remote Support Session Via a TDX Ticket
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
Manage a Ticket Template
Track Miscellaneous User Situations (OIT User Support)
https://it.umn.edu/services-technologies/how-tos/tdx-track-miscellaneous-user-situations

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
Add an Attachment to the Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5446
Relate an Asset to a Ticket
Search for a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5635
Find the Correct Responsible Group for a Technician

Ticket Communication

Communicate Through a Ticket
https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5446
Write Complete Work Notes
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
/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
/services-technologies/how-tos/tdx-work-parentchild-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
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
Work a Ticket Task
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
Complete a Ticket Task