TeamDynamix "This message was proxied" Alert Notice✅

https://it.cornell.edu/teamdynamix/teamdynamix-proxied-alert-notice

(send to it@c)

Summary
Learn what it means when you encounter a proxied message alert in tdx and why it happens.

In the ticket feed ~~for a ticket~~, sometimes there are ~~you may see a ticket~~ comments that comes in via the **TDX Email Service** ~~will be~~ that are annotated with a message that begins with,

"This message was proxied because the token was intended for [email address #1] but the reply was from [email address #2]. Further replies to this comment may no longer notify [email address #2]."

This ~~is~~ warning is not something to worry about and can ~~generally~~ be ignored. There are many reasons for why this happens but this mainly occurs ~~It generally occurs~~ because the address that sent the reply email to TeamDynamix does not match the one that TeamDynamix sent the original outgoing message to. ~~There can be a number of legitimate reasons for this.~~

~~TeamDynamix~~ Table Formatting for Knowledge Base Articles✅

(send to it@c)
https://it.cornell.edu/teamdynamix/table-formatting-knowledge-base-articles

Summary

How to manually format tables in the source code of a KB article.

Note: These steps are only applicable to those with permission to create and edit knowledge base articles on either platform.

Adding a table to a KB article(h2)

Before manually editing a table, we should go over how to add a table into a KB article. Since you can do both in IT@C and TDX, we will show both methods:

IT@C:

1. Log onto IT@Cornell.
2. Select the article you would like to edit.
3. Select Edit on the top of the page.
4. Scroll to the Body section on the Edit page.
5. Select the 6 block icon to add a table to the document.
6. Apply the appropriate table properties.
7. Select OK.

TDX:

1. Log onto TDX Client Portal.
2. Select the article you would like to edit. (skip to the important parts of the steps?)
3. Select Edit Article in the left-hand menu.
4. Scroll to the Body section.
5. Select the 6 block icon to add a table to the document.

Why use the source code?(h2)

Working in the source code allows flexibility in designing articles and manipulating objects (e.g. div, table, paragraph, etc.). This is especially true for creating KB articles that need responsive contents to fit any size screen.

Editing the source code of a table(h2)

Note: these methods require some basic knowledge of HTML/CSS and apply to both IT@C and TDX.

To start, ~~we recommend is that you~~ go into the **source code view** and use basic inline CSS styles.

Continue with the following steps:

1. Navigate to the article you're editing in IT@C.
2. Scroll to the Body input field.
3. Select the **Source** button with a page icon in the ribbon.
4. Find the table you want to edit in the code.

Note: Editing the source code in the document is different from other applications. Some edits may revert despite making changes to the code. For example, changing <h2></h2> to <h1></h1> in the code will not take effect in the document; you must use Format.

~~When working with tables in TDX, often a single word will wrap, making the table formatting look confusing to users.What Instead,~~ Here are some code examples that will allow you to adjust the table formatting.

Example code:

- Adding a `nowrap` style to the column header cell:~~, making each opening header tag~~ ~~something like~~ `<th style="white-space:nowrap;">`.
- ~~Or,~~ Giving the first column a minimum width: `<th style="min-width:120px">`.

  Note: The min width approach~~ might~~ may require ~~fiddling~~ adjusting to see the best pixel width to accommodate all the text in the first column

These methods typically fix~~es~~ the issue and ~~will~~ allow the table to be formatted correctly.

Confused on which topics the article should have since it's more relevant to end users but end users don't have permissions to edit KB articles

Cancelling a Spam or Test Ticket✅

Feeling unsure about images needing to be added since they are time consuming and the platform frequently updates - don't think they need images since the steps are pretty straightforward
https://it.cornell.edu/teamdynamix/cancelling-spam-or-test-ticket

(send to it@c)

summary:
How to cancel a spam, unwanted, or test ticket.
Why Cancel a Ticket?(h2)

If a ticket is created ~~either~~ by a spam or unwanted email, or ~~you~~ created as a test ticket, ~~you should cancel~~ it should be cancelled to prevent it from appearing in reports.

Cancelling a Ticket (h2)

Note: Every desktop is different so these steps may or may not be applicable to your needs.

1. Navigate to TDNext.
2. Select the waffle icon then scroll to select the CIT - Ticketing application. A new tab will open.

Note: You may select the ticket from the desktop as another way of cancelling the ticket.

3. Select Tickets on the left hand menu.
4. Select the ticket that you want to cancel.
5. Select **Actions** then ~~click~~ **Update**.
6. Set the **Status** to *Cancelled.*
7. Enter a comment~~,~~ such as "Spam" or "Test" into the Comments field.
8. Remove any recipients from the **Notify** fields.
9. Select Save.

~~How to~~ Prevent TeamDynamix Email ~~from TeamDynamix~~ from ~~b~~Being Routed to ~~Your~~ Junk Email ~~Folder~~.✅

https://it.cornell.edu/teamdynamix/prevent-teamdynamix-email-being-routed-junk-email

Note: Users that still have Clutter active in Outlook should ~~first~~ disable this discontinued feature as recommended by the CIT Email.

Why is this happening?
~~Sometimes~~ When users report that they are not receiving TeamDynamix emails this is ~~T~~typically ~~this is~~ because Outlook is routing the messages to Junk.

Set an Email Address as a Safe Sender

To resolve Junk routing of TeamDynamix emails, we recommend that users set the TeamDynamix emails as a "Safe Sender". To do this go to:

Images and directions are quite outdated so need to redo them.

1. Log on to your Cornell Outlook account.

2. ~~Find a message~~ Select an email from your ~~in clutter or~~ Junk Email folder.

3. Right-click or Cmd-click on the email and select Rules then Manage Rules. A new window will open.
4. Select Junk Email from the left hand menu.
5. Scroll down to the Senders section and select + Add safe sender.
6. Enter the address you want as a safe sender then select OK.

If you have issues or questions, email tdx-support@cornell.edu

~~Work with~~ Updating Ticket Notifications in ~~TeamDynamix~~ TDNext✅

https://it.cornell.edu/teamdynamix/updating-ticket-notifications-tdnext

Summary

How to notify customers or other technicians with updates through tickets.

Communicating with customers or other technicians

Having tickets properly set up in TDX is essential so that you can notify customers and other technicians with updates.

Updating Statuses through tickets (h2)

Note: Start at step 5 if you do not need more information from the customer~~, change **Status** to *Waiting on Customer*, if not, otherwise go to step 4~~.

1. Log onto TDNext.
2. Select a ticket that needs to be updated. A new window will open.
3. Click **Actions**, then **Update**
4. Change **Status** to *Waiting on Customer.*

Note: After setting ~~If you set~~ the status to *Waiting on Customer*, you should also add a date/time to **Goes Off Hold.** ~~so that t~~The ticket will revert to its previous *In Process* status if the customer has not responded by that date/time.

5. Enter your **Comments** into the Comments field~~, which will be added to the Feed and emailed to the users indicated below~~
6. ~~[~~Optional~~]~~: Uncheck **Make comments private** ~~I~~if you ~~wish this~~ want the update to be visible only in the Client Portal (customer-facing web view of ticket).

Note: this checkbox does not affect email notifications.

7. Select your audience for an email-based notification in the following fields:
    - **Notify** is a selection of users already associated to the ticket
    - **Notify Other People** is any valid Cornell NetID user
    - **Other Email Address** is any valid email address

~~Common questions~~ FAQs About Notifications(h2)

What email will TeamDynamix send by default?

table

Who gets an email if I leave the notify boxes blank?

TDX ~~does~~ only sends notifications by default for the actions listed above. For all **Update** actions, you must select an audience using the **Notify** fields.

Does the Make comments private setting affect notifications sent by email?

~~**Make comments private** only applies visibility settings to comments when viewed using the Portal, which is the web view through which customers can see and interact with their tickets.~~ Comments and updates marked as private only appear within the TDNext Feed. TDX will display a red warning box when you add recipients to the Notify fields when this box is checked, but it does not affect notification.

(unsure if all of this should stay since some has already been mentioned before)

The decision was made to leave comments private by default to prevent accidental disclosure of sensitive content through a customer-facing view. ~~While customers can access their tickets using the Portal via the link they receive at ticket creation,~~ we are not advertising its use at this time. Therefore, you may, ~~but are not required to~~, deselect **Make comments private** for customer communication ~~at this time~~.

~~TeamDynamix: Configuring~~ Creating a Public Service Form✅

Put on it@c
Get some advice from greg about the article

https://it.cornell.edu/teamdynamix/creating-public-service-form

Summary

How to create a service form and make it public for everyone.

Why create a service form? (h2)

Note: you must have admin permissions to create forms and update settings

~~While the majority of the time Departments create forms that will be behind authentication, and t~~There are situations where departments ~~will~~ need to create a form for users who do not have a NetID and reside outside of the Cornell community.

Further, this ~~KB~~ article provides information for creating a public form for users who may or may not have NetIDs.

Creating a service form(h2)

After creating your service form, there are a few settings that need to be updated in order to let users who ~~do~~ may not have NetID~~'~~s to view the form and submit a ticket if needed. ~~to update these settings you must have Administrative permissions on the portal application~~.

Steps:

1. Log onto TDX.
2. Select View Your Ticket Requests to access the CIT portal. ~~your applications portal~~
3. ~~Click~~ Select ~~on~~ the ~~"~~Service~~"~~ tab.
4. ~~Find~~ Select the service you plan on making public.
5. ~~Click on~~ Select Edit Service ~~that service and~~ from the right hand menu ~~click "Edit Service"~~

6. ~~Navigate to~~ Select the ~~"~~Form~~"~~ tab and update the following fields under the Public Requestor Settings:

- Check the box for ~~"~~Allow Public Requestors~~"~~
- Enter a service department under Default Acct/Dept.
- ~~Make sure the box is c~~Check~~ed for "~~Include a ~~C~~captcha field on the form~~" ~~under Optional Requestor Form Fields

- Select Match using Email Address ~~U~~under Requestor Matching Mode.

Note: If no requestor is found, you will be prompted to create a new requestor and associate that record to the new ticket.

7.~~ Click on~~ Select the Permissions tab ~~and~~ then ~~click on~~ select the ~~"~~Inherit Permissions~~"~~ check box. The option will ~~then~~ change to ~~show~~ ~~"~~Public~~"~~.

8.~~ Click~~ Select Save.

9. Please test to make sure the form is working correctly.

To do this, copy the form URL and open another non-authenticated browser and add the URL to the browser. Click return. If the form looks correctly and you can submit a ticket, then you have correctly configured a public form.

Record the Correct Service for a Ticket✅

https://it.cornell.edu/teamdynamix/record-correct-service-and-service-offering-ticket

Summary:

How to add the correct service offering on your ticket

What services are offered?(h2)

Note: Make sure you are only selecting services that are marked for use with CIT - Portal.

~~Be aware that t~~The TDX Service Catalog contains services and offerings used by non-CIT support areas. Until you are familiar with the services and service offerings, ~~you~~ use ~~most~~ frequently selected services ~~with tickets,~~ and the magnifying glass will be your best options. ~~as it displays the associated application~~.

See Reference Guide - CIT Service, Service Offerings, and Activities for a list view of CIT's current Service Catalog.

Types and Services in TeamDynamix ~~are derived~~ come from the IT Service Portfolio. Therefore, ~~U~~use the Portfolio to find the appropriate ~~entry~~ service offering from all departments for your ticket by following the steps below. ~~Service offerings are presently listed in the "Product" table inside a given service, so begin at the service, then find the appropriate offering contained within.~~ (need?)

1. Navigate to the IT Service Portfolio.
2. Select List All Services

Editing the Service Offering on a Ticket(h2)

1. Log onto TDNext.
2. Select a ticket you would like to edit. A new window will open.
3. Select Edit from the top ribbon of the window.

Note: Partial words will **not** return hits when searching for services. ~~y~~You must enter a complete term.

4. Enter a service offering in the Service field or by searching with the magnifying glass icon.
5. Enter a service activity in the Service Offering field or by searching with the magnifying glass icon.

Note: The Service Type will update on its own to match the Service and Service Offering (See Start Work on an Existing Incident or Service Request.)

6. Select Save.

~~Once you've identified the offering, you can either type it directly into the field labeled *Service* on a ticket form, or you can use the magnifying glass button next to that field to search if the one you're looking for doesn't appear directly. Once you enter the *Service* -- or *Service Offering*, if there are any -- the *Service Type* will update on its own to match. (See [Start Work on an Existing Incident or Service Request]().)~~

- ~~When typing directly into the *Service* field, your entry will search against the name and catalog description. Partial words will return hits, i.e. "red net" will return "Sponsored NetID." 5 results will be shown - sort order unknown. Magnifying glass search also searches against name and catalog description, but will show you 20 items at a time, and displays the associated Portal.~~
- ~~When typing directly into the *Service Offering* field, your entry will search against the name and catalog description only for the items associated with the already selected *Service*. Partial words will **not** return hits - you must enter a complete term. Enter 2 spaces to see the first 5 alphabetical entries in the list, or use the magnifying glass to see all the available entries.~~

Remove Unused Attributes/Custom Fields in Forms✅

https://it.cornell.edu/teamdynamix/remove-unused-attributescustom-fields-forms

Purpose of Attributes and Custom fields(h2)

Note: Only admins have permission to edit or modify forms for attributes and custom fields.

In TeamDynamix, we have the option to create and add ~~C~~custom ~~A~~attributes to ~~T~~ticketing applications, which can then be used as ~~C~~custom ~~F~~fields on ~~F~~forms.(Don't think it needs a stylized text)

A custom field can be removed ~~from a form~~ by editing the form,~~. H~~however, the custom attribute will remain a part of the application and can be used on other forms.

If a ~~C~~custom ~~A~~attribute is no longer needed for an application, it may be removed using the following steps below. ~~app admins can consider removing it.~~

Removing Attributes and Custom Fields(h2)

Note: Historical data may ~~have~~ be~~en~~ stored in ~~that~~ a form ~~E~~even if a custom attribute is inactive ~~no longer used in any form~~. Therefore, if a custom attribute is deleted, the information will also be permanently deleted.

1. ~~Enter~~ Log in to TeamDynamix then select Administrators (TDAdmin). ~~and~~

2. ~~s~~Select Applications from the left hand menu.

3. Select an application ~~the corresponding application that~~ you ~~wish~~ want to edit ~~remove the field from~~. ~~This~~ For example purposes, we will be using the CIT - Ticketing application.

4. ~~Once CIT - Ticketing has been~~ sSelect~~ed~~ ~~you can find the Custom Fields under the~~ Attributes ~~option~~ on the left-hand ~~side~~ menu.

5. Optional: ~~You can also s~~Select ~~the~~ View ~~option~~ under Form Usage to ~~make sure~~ check if the ~~C~~custom ~~F~~field/~~A~~attribute ~~you will be removing~~ is active or inactive and view additional details ~~not in use~~. A new window will open. ~~This will give a window showing which Forms contain the Custom Field/Attribute.~~

6. Select Delete on the far right side of the screen to remove an attribute or custom field.
~~The option to delete the field will be located on the right.~~

Set Order for Items in the Client Portal✅

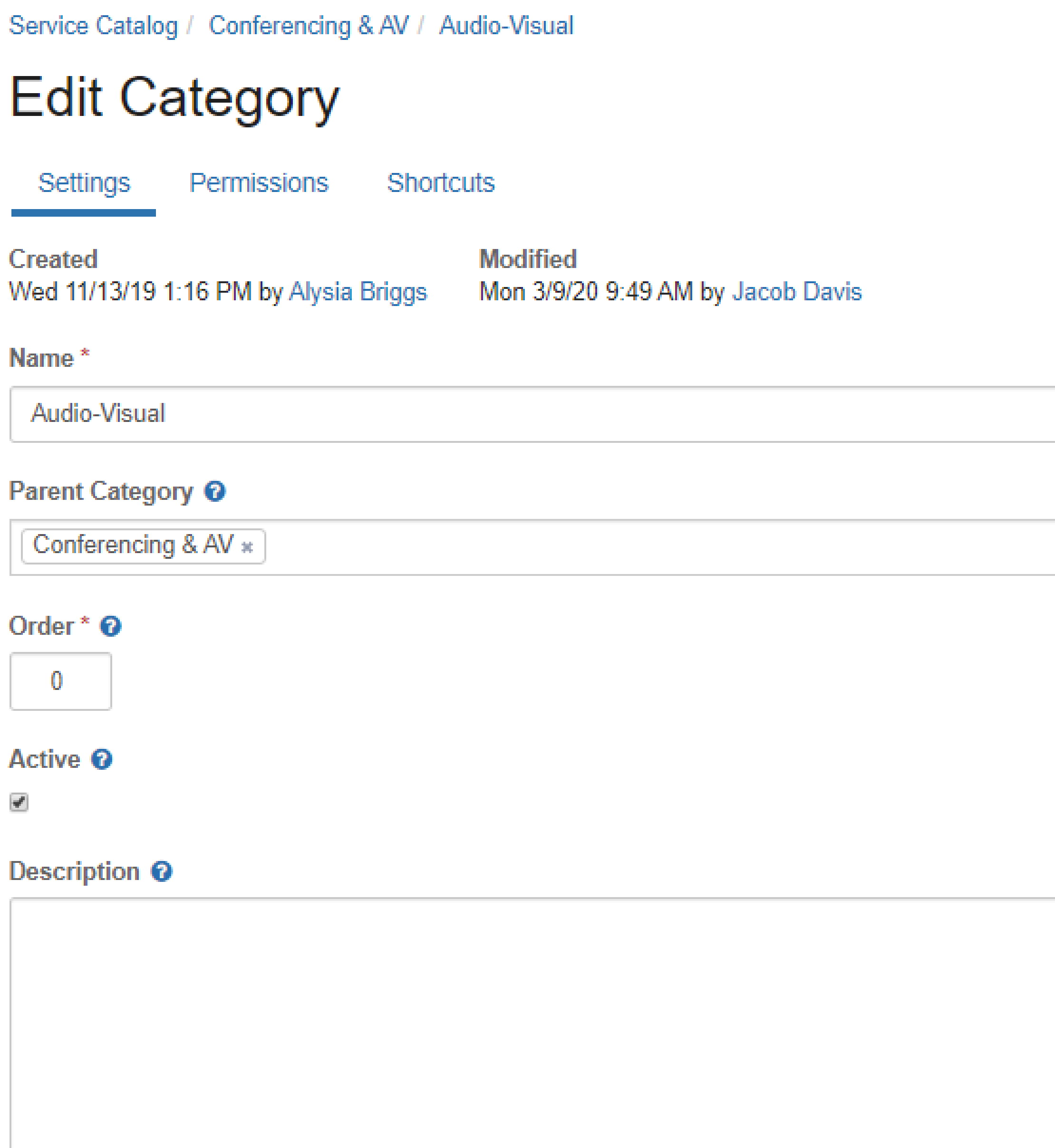
~~(stays on tdx)~~(goes on it@c)
https://it.cornell.edu/teamdynamix/set-order-items-client-portal

Why Are Items Set in Order?(h2)

TeamDynamix defaults to alphabetical ordering of content in the ~~C~~client ~~P~~portal. All new items including ~~A~~articles, ~~C~~categories, ~~S~~services and ~~S~~service ~~O~~offerings~~,~~ will have an Order value of 0. Furthermore, this information is set automatically.

What is the Order For?(h2)

The Order is used to ~~order~~ arrange each article among all of its siblings (that is, if all the articles are in the same category). Articles are ordered first by ~~this~~ its value ~~and~~ then by ~~the~~ its subject. On the other hand, p~~P~~inned articles will always be at the top of the article list ordered by subject.



Pinning Favorite Service Offerings & Activities in TDNext✅

Pinning in TDNext(h2)

You can pin commonly used service offerings and activities in TDNext to make filling out forms quicker and easier. ~~The pinned "Favorite Services" menu will open a new tab with the selected service offering or activity in the Portal view; make sure to change the Requestor from yourself to the appropriate individual when submitting.~~

Setting a Favorite Service Offering or Activity

1. ~~Navigate to the appropriate~~ Navigate to TDClient.
2. Select Services from the navigation bar on the top of the page. This will take you to the Service Catalog.
3. Select the appropriate categories to find your service then service offering.

Note: Skip to step 5 if the Service Offering panel does not have any ~~has no~~ activities.

4. ~~location in the Service Catalog. If there *are* activities, choose~~ Select the appropriate service offering ~~one~~ ~~in~~ from the ~~"~~Service Offerings~~"~~ panel on the bottom right side of the page.
5. ~~Click~~ Select ~~"~~Add to Favorites~~"~~ on the right hand menu ~~side~~.
6. Select My Favorites from the navigation bar to view your favorite service(s).
7. ~~When you return to TDNext, refresh the page and you will see the item in a new "Favorite Services" menu in CIT - Ticketing.~~

Creating Tickets Using Favorited Service Offerings or Activities

1. Log in to TDNext.
2. Select the waffle icon on the top left of the screen.
3. ~~As in step 3 above, s~~Select the CIT - Ticketing application from the menu.
4. ~~a favorite from the~~ Select "Favorite Services" from the navigation ~~menu~~ bar on the top of the screen ~~in CIT - Ticketing~~. This will open a request form.
5. ~~A new tab opens in the Portal with the appropriate service offering or activity and its form.~~
6. Enter ~~Set~~ the appropriate **Requestor** in the Requestor field ~~appropriately~~ and other additional fields.
7. ~~Complete the form, then select **Request**. TDX will route the ticket according to its normal rules.~~ Select Save.

8. Select **View the request you just created.**
9. Go to TDClient.
10. Select Services in the navigation bar.
11. Select Ticket Requests to view the submitted ticket.
12. Select To TDNext to send the ticket to TDNext.

TeamDynamix Client Portal Footer Code✅

Purpose of the Footer Code(h2)
TeamDynamix's Client Portal footer, as shown below, is meant to be used as a reference so users can quickly drag and drop the code. The code contains links to web accessibility assistance and the Cornell University website.

TDX Client Portal Footer Code(h2)
insert code

~~Service Fields in TDX~~ Known TDX Service Field Error and ~~Workaround~~ Temporary Solution✅

Better title?: ITSM and TDX Data Model Solution in TDX
(Solutions seems more natural than workaround)

Note: Use the instructions template to notify others of errors and learn more about what known errors are.

~~Brief Description~~ Error Causing Issues with TDX

~~The out of the box~~ Generally, service related fields in TeamDynamix are confusing to fill in and ~~don't~~ typically do not align with IT Service Management best practices which creates issues with:

- Logging tickets
- Storing ~~knowledge~~ information
- Reporting
- Mapping relationships in asset
- Organizing the catalog

~~among~~ And many other fundamental ~~things~~ concepts a service management suite should provide. See Problem Ticket for more details.

~~Workaround~~ Temporary Solution

To work ~~around~~ with this lack of structure, the service management team ~~has set up~~ developed a common service data model that ~~gets~~ applies to service related fields and objects within ~~the~~ CIT, TDNext, and other portal applications ~~in order for~~ so objects ~~to~~ maintain alignment for administration and use.

Administrators of TeamDynamix applications who ~~are~~ use ~~this~~ the data model as a service management suite and manage organization-wide practices ~~out of the tool~~ will need to configure their application ~~in order~~ to make it work ~~that possible~~. ~~(this feels like a sidenote? Unsure where to fit it)~~ (what is the tool they're referring to? The charts?) - no i see it's the data model

A common service data model can be applied to enable management of services, CIT's documented structure is ~~documented~~ here.

~~Instructions~~ ITSM and TDX Charts for Technical Support Staff

For staff familiar with definitions ~~of service,~~ and service offering, here is a table that explains what conceptual fields ~~map~~ connect to the technical fields in TeamDynamix.

Portal Service Catalog and Knowledge Base:

Conceptual Model (ITSM)	**TDX Field Name (TDX)**
Service Category	Category
Service	Sub-category
Service Offering	Service
Service Activity	Service Offering

TDNext Ticketing and Asset Management:

Conceptual Model (ITSM)	**TDX Field Name (TDX)**
Service Line	Type Category
Service	Type

Service Offering	Service
Service Activity	Service Offering