Overall audience/purpose to focus on:

- Already aware of teamdynamix to a certain extent; focuses on getting the information quickly without much added in-depth details that a new audience wouldn't understand at all
- Articles are used as a reference/troubleshooting guide
- IT@C articles provide similar information but to a different audience like students, certain faculty and staff, people not well versed in IT
- Sometimes there are buttons on a page like tdnext that has additional information that many may not click on - would probably be a good idea to include it as a tip in the kb articles for good measure

Work with Responsibility in TeamDynamix ✅

(fix the tone and diction, should be easy to breeze through)

About Responsibility

Responsibility in TeamDynamix represents the ticket's assignment. A ticket can be assigned to a support group or to an individual. This is done via a single field on ticket forms that sets values for several attributes behind the scenes.

Because you cannot independently set a responsible group and a responsible individual, **order of operations matters when assigning tickets**. In addition to this complexity, users may be members of zero or more groups, and may have a primary group designated (but are not required to).

How do I tell who a ticket is assigned to?

The Responsibility field will show the name of the group and individual (if any) ~~and the individual (if any)~~ to who the ticket is assigned. It will display it in the format *GroupName / PersonName*. If there is no group name and person name then none are assigned.

How do I ensure the group and individual are both assigned correctly?

The easiest method is to begin by setting the responsible to a group. After saving, the ticket can be picked up by or assigned to any member of that group.

To assign tickets to a specific individual in a group: (add "tickets" for clarity and to match the steps below)

1. Assign responsibility to a group.
2. Save the ticket.
3. Assign responsibility to an individual to make sure both values are entered properly.

However, there are limitations to be aware of when managing groups:

Ticket has no group responsible with a primary group • Assigning it to a user will set the group responsible to the user's primary group.	Ticket has no group responsible without a primary group • The group responsible will remain unassigned for the user.
Ticket has a group responsible with a primary group • Assigning it to a user who is not a member of that group will set the group responsible to the user's primary group.	Ticket has a group responsible without a primary group • The group responsible will remain unassigned for the user.

Why does this matter?

The group responsible is used to drive most of the reporting and desktop views used by managers and technicians working with tickets.

Therefore, correctly managing the system is important as assigning tickets out of order may cause gaps in the responsibility that can lead to:

- "Losing" tickets from desktop views.
- Inaccurately understanding the volume of work.

ITSD - TDX - Look up the Service Delivery Team for a Service ✅

(i think in this case, the audience should know what e.g. and i.e. are for)

Overview

This article will explain how to look **up the Service Delivery Manager** in the IT Service Portfolio then **use TeamDynamix (TDX) to find the support group** associated with that service manager.

This also works if you need to reassign ownership of a KB article to a group instead of a person.

Start on step 1 to find a service manager's name

1. Click on the [IT Service Portfolio]() link to access the repository for IT services.
2. Enter the name of the service or partial name (e.g. CIT) in the **Keywords** field.
3. Click Search.
4. Select a service from the search results.
5. Scroll to find the **Service Manager** for the service.
6. Return to the TDX ticket in TDNext
7. **Responsible**, select **Search**.(unclear where responsible is)

   (go to service request on the desktop then find responsible and follow the steps)

Start on step 6 to find what service team a service manager belongs to

8. Paste the Service Manager's name into the **Search** field and select **Search**.
9. Do not assign the ticket directly to the Service Manager. Instead, assign it to their support group.
    - To do so, under **Profile** select **View**. (Opens in a new window.)

10. Under **Groups**, copy the service group that best matches the service (usually the primary group).
11. Return to the TDX search box. Paste the Group name into the **Search** field and select **Search**.
12. Select the group from the search results to transfer it into the responsible field.
13. **Save**.

Make sure to leave a comment about why you are transferring the ticket.

Additional Note: Support Groups and Service Delivery Teams are kept in alignment with the CIT Organizational Charts, so finding the name of the manager can also help you identify what group to route the ticket to using the published Org charts..

Create a new incident or service request✅

Overview

In this article, we will be exploring the quickest method on how to make a ticket from scratch directly in TDX.

Note: You can create a ticket by forwarding something to an EGA used by your team, but you will still have to manually edit the ticket's service, status, classification, form, and customer.

1. Log in to the **TDNext** platform.
2. Click on the waffle icon on the upper left corner.
3. Select the CIT - Ticketing application in the menu.
4. Select **+ New** in the center of the page.
5. Click the **Form** corresponding to the **ticket classification** in the window pop-up.
6. Enter the customer's name or NetID in the requestor field.
7. Type in information about the ticket in the **Summary** and **Description** fields.
8. Select an appropriate **Impact and Urgency** in the fields for the ticket (if available).
9. Select the service offering from the dropdown menu or use the **magnifying glass icon** to search in the Service field.

Note: TDX may automatically set the **Service Type** based on the **Service** you selected. If it doesn't you should enter the appropriate **Service Type** information.

Tip: Make your best guess when you choose the service offering.

10. In the **Status** field:
    - Select **In Process**, to assign it to yourself.
    - OR, Select **Reassigned**, to assign it to another technician or service delivery team.
11. Select yourself by name or NetID, technician, or service delivery team in the **Responsible** field.
12. Click **Save**.

If continuing with this ticket, follow the steps to **work a ticket**.

To learn about working on a ticket, check out the following steps for **work a ticket**

Who Can Create Ticket Alerts✅

Overview:

In this article, we will be discussing who can and can't create ticket alerts and additional features in TeamDynamix.

~~Add Alert Feature~~ ticket alerts

TeamDynamix (TDNext) allows technicians to add an alert to their tickets to inform them any time their ticket is updated. However, customers cannot add alerts to tickets as that option is no longer available.

How to create ticket alerts

1. Select a ticket.
2. Click the My Alerts tab in the ribbon.
3. Click + Add.
4. Select the alerts that best apply to you.
5. Click Save.

~~Question~~ ticket alerts **(makes more sense to get rid of the question and explain what the section is about instead)(move to top instead)**

Can we limit client ability to create ticket alerts?

Answer

Technician: In TDNext, technicians can create alerts for tickets. We plan to leave that functionality on.

Customer: In the portal, the customer used to be able to create alerts. However, that is now turned off.

(check with jp if the historical aspect of it used to being an option should remain on the article)

ITSD - Routing TDX Related Issues and Requests✅

I think if a technician looks at the article, they need something simple and quick to skim through especially if they’re on a time crunch

Overview:

This article will be explaining how to deal with routing issues and requests in TeamDynamix (TDX).

Service Description

Service Management Suite

TeamDynamix (TDX) is the *Service Management Suite* used to assign ~~out~~, track, and fulfill tickets ~~and/por~~ requests for campus services including IT Service Management for CIT and ~~many~~ other campus units.

Tickets in service management suite should be classified as:

Service Type: Service Management

Service: Service Management Suite

Portfolio and Project Management (PPM)

CIT also provides "Best Level of Effort" support for the *Portfolio and Project Management (PPM)* tool in TeamDynamix.

Tickets in portfolio and project management should be classified as:

Service Type: Project Management

Service: Project Management (TeamDynamix)

(i feel that a table (or multiple tables) would work below)

Incidents (separate the tables or keep them together?)

Incidents - Break/Fix Issues	Solutions
• Issues with the system if something is not working as designed. • Access Requests, Modifications, and Requests for information. • Requests for Enhancement	Contact **CIT - ES - Academic & Support Services**
Incidents - ITSD Lvl 2 - TDX Email (not received by requestor)	**solutions**

• Issues with the system if something is not working as designed.	Contact **CIT - CX - ITSD Service Desk (Main Entry)**

Note: example for itsd lvl 2 incident

Issue ~~Overview~~ Example: ~~sometimes~~ A Requestor ~~are~~ says~~ing~~ they do not receive emails from TDX. The steps on how to resolve:

1. ~~First~~ Ask them to review their Junk Email Folder. If it's in the email folder, have the Requestor: (a) click on the email, (b) right click, select "Junk" then "Not Junk".
2. If the Requestor says it's not in the folder, do an email trace to see if the email was sent from TDX and delivered to the Requestor's email.
3. If the email was not sent from TDX to the Requestor's email, forward the ticket to **CIT - ES - Academic & Support Services**.

Service Requests

Frequently Asked Questions (FAQ)	Respond with the information from this FAQ KB Article ~~and~~ then close the ticket if the answer is sufficient to the customer.
Known Issues	See this known issues list ~~in this case~~ to let the customer know that the issue is being addressed by the technical team and the vendor. ~~and~~ Close the ticket ~~as we do not need another ticket to address a problem~~ since it is already being worked on.

Enhancement Requests and Feedback

~~These~~ Requests are prioritized and reviewed in ~~a~~ monthly meetings with the TDX Tech Team and ITSM Team.

Large scale changes require participation from ITSM Governance which means that these are consulted on by the ITSM Steering Committee when an enhancement impacts how work at CIT is performed, and that they are also discussed in the Monthly ITSM Director's meeting if a change will impact cross-functional groups or division wide ITSM processes.

As system wide changes may impact other Unit-IT groups and Non-IT groups using TeamDynamix(TDX) requests ~~for system wide changes~~ need to be reviewed/approved in collaboration with the TDX Advisory Committee and the tech team.

Documentation

Tool and ITSM Documentation is available in the TDX Knowledge Base https://tdx.cornell.edu/TDClient/39/Portal/KB/?CategoryID=739

Escalations

For escalations, contact **CIT - ES - Academic & Support Services** group in the CIT TeamDynamix ticketing application or fill out a request form at https://tdx.cornell.edu/TDClient/39/Portal/Requests/ServiceDet?ID=179 or ~~an~~ email to tdx-support@cornell.edu

Vendor	Escalations will be handled by level 3 support.
Other groups	Escalations will be handled by level 3 support.

For specific support contacts please reference the On Call Lists (try to find kb article or list and link it?) for contact information and the IT Service Portfolio for service manager and owner information.

- OpsGenie on-call team: CIO_AcademicTech_TeamDynamix (not sure what this is for)