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

Reassign a Ticket within CIT - Ticketing✅

Goal: make this applicable and easy to understand for the it@c audience

https://it.cornell.edu/teamdynamix/reassign-ticket-within-cit-ticketing

Overview
In this article, we are going over how to ensure that a ticket is updated appropriately so that the receiving party is aware of the reassigned ticket.

Who gets the reassigned ticket?

Groups ~~must~~ establish their own practice for distributing escalated tickets by either:

- Using a 'triage' role to quickly assess and assign tickets to others on the team
- team members are responsible to 'pick up' their own tickets.

~~**In general**~~ **Therefore, do not assign a ticket to an individual in another group unless you have communicated with them directly.**

Reasons to avoid direct assignment include ~~unwittingly~~ unknowingly assigning the ticket to:

- the wrong team member
- an individual who is away or on vacation
- an individual who is already tasked with higher priority work

All of these could potentially cause unnecessary delays in resolution of the ticket.

(make this a note here?)

If you don't know where to send the ticket, you can **look up the service delivery team**.

You can also **transfer a ticket to another ticketing app**.

Reassigning a ticket

1. Select **Actions > Update**.
2. Change **New Status** to *Reassigned*.
3. Update **Responsibility** to the new Support Group or individual.

Tip: If you do not know which group is appropriate, you can always assign to **CIT - CX - IT Service Desk (Main Entry)** and ask for routing assistance.

4. Enter a **Comment**; you may choose to notify the requester about the reassignment if you wish.
5. Select **Save**.

How TeamDynamix Handles Replies to ~~the~~ Sent Email ~~It~~ ✅ ~~Sends~~(change title to not have ‘how’ in it- goes against style guide)

(based on the info given, it seems like this is directed at IT specifically or those who want to know how the tdx email system works in more detail?)
https://tdx.cornell.edu/TDClient/39/Portal/KB/ArticleDet?ID=686

How TeamDynamix Sends Out Email

~~Email sent out from~~ TeamDynamix ~~is sent~~ sends all email from *cornell-notify@support.mail.cornell.edu*. ~~All email from Cornell's TeamDynamix system comes from this address.~~ This address was agreed upon by all of the university units participating in the initial deployment of TeamDynamix at Cornell. (is this necessary?)

separate email domains(h3)

Having a separate e-mail subdomain (*support.mail.cornell.edu*) allows us to assign the TeamDynamix mail system permissions without creating a~~n~~ ~~unacceptable~~ risk to Cornell's general email environment (*@cornell.edu)*.

~~so~~ We do this so that messages coming from TeamDynamix will pass the DKIM, SPF, and similar checks used to reduce/filter out spam.

Note: ~~TeamDynamix has recently introduced an ability a feature to have more than one customized outgoing email address.~~

Cornell does not use TeamDynamix's customized outgoing email address feature because mail sent using those options would be overrun with ~~invariably run afoul of~~ spam filters, exchange messaging limits, and other technical issues that would result in a less reliable email experience.(no need to use bullet points as it's not something the reader needs to remember)

Email Reply Tokens

TeamDynamix embeds reply tokens in (don't think this needs to be linked) most* outgoing email messages. A reply token is recognizable as a block of text near the end of an email starting with the text:

Ex: ----TEAMDYNAMIX DO NOT ALTER OR REMOVE THIS CODE---- .

Second reply token(h3)

~~There is also~~ a second reply token is embedded in the header of the email message, so that a reply may still be processed even if someone accidentally deletes or alters the reply token ~~that is~~ in the body of the email message.

~~The~~ reply tokens must be included in any replies to the TeamDynamix system so that TeamDynamix can link the message to the corresponding ticket.

Exception: Surveys sent from TeamDynamix do not include a reply token because the recipients are meant to click the survey link in the message rather than reply to it.

Where should replies in teamdynamix be sent?

Replies must be sent to *cornell-notify@support.mail.cornell.edu.* ~~Other email addresses that receive email for~~ TeamDynamix's other email addresses are only for the creation of new tickets, and cannot process messages with reply tokens.

Cornell's TeamDynamix administrators have ~~put~~ email rules in place on each of the incoming ticket creation email addresses to only identify messages with reply tokens and redirect them to *cornell-notify@support.mail.cornell.edu.* This method ~~is not perfect and~~ should not be relied on, but does help catch many errors and improve the reliability of the email experience TeamDynamix provides to Cornell.

~~Email messages sent to *cornell-notify@support.mail.cornell.edu* that do *not* contain a reply token cannot be processed because TeamDynamix will not know which ticketing application the message is intended for.~~ (maybe including only in the prev paragraph removes the need for this one)

Mail filters in TeamDynamix

Mail filters are in place to catch ~~such~~ messages and route them to the IT Service Desk so that the messages don't just vanish. However, the ability of Outlook to filter such messages is limited. (necessary?)Cornell's TeamDynamix administrators do investigate email system errors, but this inevitably results in a delay in those messages getting to their intended destination.

Filtering Replies to Stop Spam, Automated Replies, and Potential Mail Loops (this section could go here since it follows the topic of filters)

Various automated systems including other ticketing systems, out-of-office notifications, and more may reply to TeamDynamix email messages. This results in extraneous messages being appended (i think the word should be fine but unsure) to TeamDynamix tickets. ~~At worst~~ Yet, it can create a never-ending loop of replies ~~replying to other replies~~ which creates larger system problems.

Cornell's TeamDynamix administrators maintain email filters ~~on the email account~~ for *cornell-notify@support.mail.cornell.edu* to prevent known problems from recurring.

Note: If you notice a new email loop, please immediately contact Cornell's TeamDynamix support team to investigate and make any necessary adjustments.

Use Case:	TDX

Email is sent from cornell-notify@support.mail.cornell.	
~~Email is sent from cornell-notify@support.mail.cornell.edu.~~ Action: recipient hits reply with no changes to the email. This means there is still (most likely) a reply token in the message.	TeamDynamix should receive the message and update the existing ticket.
~~Email is sent from cornell-notify@support.mail.cornell.edu.~~ Action: recipient removes the reply token from the message and hits reply. This means there is probably still a reply token in the message headers.	TeamDynamix should receive the message and update the existing ticket.
~~Email is sent from cornell-notify@support.mail.cornell.edu.~~ Action: recipient hits reply or forward and changes the address to a TeamDynamix EGA address other than cornell-notify@support.mail.cornell.edu, **without** removing the reply token from the body of the email message. This means there is a	TeamDynamix should receive the message and update the existing ticket.

reply token in the body of the message.	
An email is sent from TDX, Action: recipient hits reply but removes the email address (cornell-notify@support.mail.cornell.edu) and adds in the EGA and they remove the unique identifier at the bottom of the email.	Email goes to the EGA mailbox and not TDX
~~Email is from cornell-notify@support.mail.cornell.edu.~~ recipient hits reply or forward and changes the address to a TeamDynamix EGA address other than cornell-notify@support.mail.cornell.edu and **removes** the reply token from the body of the email message. This means there is probably still a reply token in the message header.	The EGA's Outlook rules will probably not catch this, and the message will trigger an error and go nowhere.
~~Email is from cornell-notify@support.mail.cornell.edu.~~ Recipient hits reply or forward and leaves the unique identifier at the bottom of the email, however,	This means the message will trigger an error and go nowhere.

the email client alters the unique identifier string.	
User directly sends an email ~~directly~~ ~~to~~ ~~cornell-notify@support.mail.cornell.edu~~ (without any prior ticket info). ~~This means there is~~ with no reply token in the message.	The Outlook rules for cornell-notify@support.mail.cornell.edu will direct the email to go to the ITSD.

Requesting and using response templates✅ https://it.cornell.edu/teamdynamix/requesting-and-using-response-templates

(make this an article for it@c)

summary

In this article, we will be discussing how to use response templates and how to request one be added or changed.

Who creates and approves response templates?

Note: the information only applies to templates within CIT's Service Management Suite in TeamDynamix.

Response templates are canned responses ~~pre-~~set up in TeamDynamix for responding to routine customer requests and ~~routine~~ process steps. They ~~exist~~ are available for CIT staff use but most are not required ~~to be used,~~ unless directed to by ~~do so from~~ your team's support procedures or a CIT wide practice.

Note: only TDX admins have permission to edit templates

Additionally, response templates ~~are required to be organized~~ are created and managed by the

Service Management Team and Academic and Support Services Team at the request of support teams and process owners. (keep?)

~~for maintenance.~~

~~overtime and should be are reviewed by the~~

Response Template Owners ~~to ensure appropriateness~~ are responsible for reviewing/approving any suggested changes or feedback, and maintaining accuracy over time.

When to use response templates

Response templates should be used to reduce time spent typing, ~~or~~ copying, ~~and~~ or pasting commonly repeated messages or phrases. They can also help provide a consistent voice among team members or across CIT.

Where are the response templates

Response templates are available via the Comments field when using the Update action on any TeamDynamix ticket. Here are some steps to quickly find them:*

Using CIT - All Templates

~~These are available for use by anyone with access to the ticketing system. They have been crafted by Communications & Documentation to provide a consistent voice when making some of the most frequently used types of communication with our customers.~~ (pretty redundant, don't think it's needed anymore)

1. Navigate to TDNext and select a ticket.
2. Select Actions > Update in the ticket window pop-up.
3. In the Update pop-up window, select "Templates" from the Comments HTML editor widget.
4. Select the "CIT - All" folder, and the appropriate template.

    - ~~Provide Link to Documentation~~
    - ~~Provide Link to Self-Service Form~~
    - ~~Decline Support for Legal/policy Reasons~~
    - ~~Response to Phishing Inquiries~~
    - ~~Notify Customer of Major Incident~~
    - ~~Follow-Up~~
    - ~~Resolve After Third Contact/No Response~~

5. Edit as needed.
6. Select Save.

Using Team-specific Templates

Your team may have its own templates; if there are any available, they will be located in a folder with the same name as your support group (minus the CIT and division prefixes).

1. Navigate to TDNext and select a ticket.
2. Select Actions > Update in the ticket window pop-up.
3. In the Update pop-up window, select "Templates" from the Comments HTML editor widget.
4. Select your group's folder~~, and~~ then appropriate template.
5. Edit as needed.
6. Select Save.

Requesting New Response Templates

While you cannot create them in TDX yourself, you can submit the full text of your response template such as the ~~including~~ title, greeting, and closing~~,~~ as a TeamDynamix App Configuration Request. You may submit more than one response template per ticket; attachments such as Word documents are accepted.

Here are some ideas to keep in mind for the request:

- Create response templates to reduce time spent typing, copying, and pasting commonly repeated messages or phrases.
- Templates should **contain a greeting and closing, be well-written, and use a conversational tone**. Consider having an editorial review done by Communications & Documentation.
- Make use of **template tags** when possible (e.g. user's first name, technician's name and support group).
- **Template titles** should be specific enough to describe their purpose but remain concise.
- **Response template categories** are named for the owning support group minus the prefixes (e.g. response templates for the *CIT - CX - Service Management* group are stored in the "Service Management" folder). **Response template categories cannot be nested**.

~~If you are suggesting changes or modifications to response template not owned by your group then you should give feedback to the response template owner.~~

~~Changes or modifications requested to response templates owned by other groups will be sent to the manager or process owner for review before changes are made.~~ (seems like the info was already mentioned earlier)

Here is an example of the available template tags in a response template as no other ticket attributes can be dynamically inserted.

Tag	Example Value
LastModifiedDate	1/2/2023
RequestorFirstName	Alex
RequestorFullName	Alex Client
RequestorLastName	Client
TechnicianFirstName	Cameron
TechnicianFullName	Cameron Analyst
TechnicianFullNameWithNickname	Cameron Analyst (Cam)
TechnicianLastName	Analyst
TechnicianNickOrFirstName	Cam
TicketID	123456

(unsure if this table is necessary per say)

Procedure for Requesting Removal of PII/Sensitive Information from TeamDynamix✅

(make it an it@c article)
https://it.cornell.edu/teamdynamix/removal-piisensitive-information-teamdynamix

Summary
In this article we will be explaining the procedures for requesting a removal of personally identifiable information (PII)/sensitive information from TeamDynamix.

Explain what PII/sensitive information is and give examples

What is PII/Sensitive Information?

Personally Identifiable Information or PII can be described as factors that make it easy to pinpoint who someone is.

As defined by Cornell, some examples of PII and sensitive information include:

- SSN
- Credit card or debit card numbers
- Driver’s license
- Health information

How Does Cornell Store Sensitive Information?

Cornell does not authorize the storage of certain sensitive information in TeamDynamix.

See the Cornell Regulated Data Chart for specifics.

Request Removal of Information from TDX

Submit a support request to the Cornell TeamDynamix support team detailing your request if you have identified information stored in TeamDynamix that is not authorized to be stored in TeamDynamix and are unable to remove it yourself.

Requests will be reviewed and acted upon by Cornell's central TeamDynamix system administrators.

How long does it take for the request to be completed? I think this info should be included especially depending on the urgency

How long will the removal take?(h2)
Depending on the severity of the case, it can take up to 24 hours to complete a request.

Merging Tickets✅

(transfer article to IT@C)
https://it.cornell.edu/teamdynamix/merging-tickets

Summary

How to merge tickets when there are duplicates or similar issues and requests from different threads.

Why Merge Tickets?

~~You may find that there are two or more tickets that are actually~~ When there are duplicates or different threads of conversations for the same issue or request, it is best to merge tickets.

~~This~~ Merging tickets has several benefits for the system such as:

- more accurate reporting -- not inflated ticket numbers
- Communication stays in one place
- Replies to merged tickets, regardless of which one was merged, show up in ~~the consolidated~~ one combined ticket

Merging Tickets Steps

Ticket to keep

Duplicate ticket

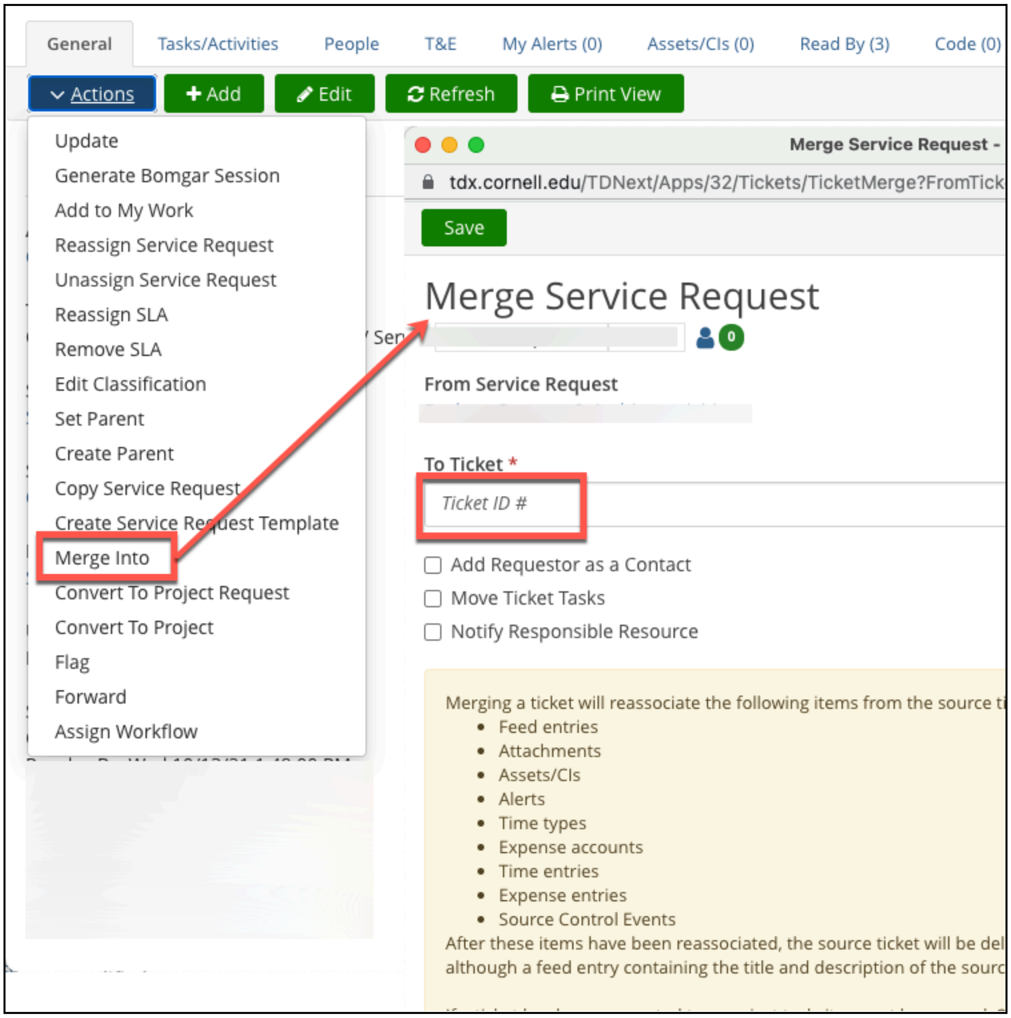
1. Navigate to TDNext then select a ticket you want to merge.
2. ~~Be ready with the number of the ticket that you wish to merge into.~~

Note: keep the ticket IDs of the ticket you want to keep and the one you want to duplicate. This will be helpful during the merging process later.

~~2. Open the duplicate or forked ticket(s) that you want to merge.~~

3. Select **Actions > Merge Into**.
4. Enter the ~~number~~ ID of the ticket you want to keep ~~from step 1~~; this ~~which~~ will be the remaining ticket after the merge is complete.
5. Optional: Check any boxes below for ~~various~~ additional features. The yellow panel explains what will take place during the merge operation.

6. Select **Save**.



~~Start~~ Working on an Existing Incident or Service ~~Request~~ Ticket✅ (ticket seems better for the article's purpose)

(transfer article to IT@C)

https://it.cornell.edu/teamdynamix/work-existing-incident-or-service-ticket

Summary:
How to work on an existing incident or service ticket

Ways to submit a ticket
A ticket ~~might~~ can be submitted in several ways:

- A customer submits a ticket to your group directly through the Service Catalog.
- A generated email sent to an EGA that is assigned to your support group
- Your support group is assigned a ticket by the Service Desk.

Note: In all cases, follow the steps below to ensure you maintain ticket accuracy by verifying the 5 key things.

Steps to work on an existing ticket

Assign the Ticket to Yourself or Another Team

Note: If the ticket is already assigned to you individually, skip to the Review and Work a Ticket section.

1. Open Ticket:

    - Log on to **TDNext** ~~and~~ then select the ticket **ID** or **Title.**

    - OR, click ~~on~~ the **Support Staff** link in the ticket email.

2. Select **Update** > **New Status** >
    - Select **In Process**, to assign it to yourself.
    - OR, select **Reassigned**, to assign it to another service delivery team.
    - OR, select **Cancelled**, if it is not a ticket (i.e. automated email, test ticket, etc).
3. In the **Responsible** field**:**
    - Enter your NetID to assign it to yourself.
    - OR, enter a Support Group name to assign it to another service delivery team.

4. In the **Comment** field, add a comment about what you're doing with the ticket. ~~such as "Reviewing request" or "Assigning to appropriate team."~~
    - ~~You can also write a more customer-appropriate message if you already have a message for them.~~

5. ~~You may wish to~~ Optional: Modify or remove the **Notify** recipients. The **Requestor** is always pre-selected for notification.
6. Select **Save**.

Review and Work a Ticket:

This ticket is now ready for next steps: documenting work, customer communication, or resolution.

1. Open the Ticket:

    - Log on to **TDNext** and select the ticket **ID** or **Title.**

    - OR, click ~~on~~ the **Support Staff** link in the ticket email.

2. Are the Service and Service Offering correct?
    - If not, select **Edit**, then under **Service**, select the appropriate value or select the **magnifying glass icon** to search.
    - ~~Next, choose~~ select the appropriate **Service Offering**, or "General Support" if nothing ~~more~~ specific fits.

Tip: Type two spaces to see the first five entries in a TDX drop-down.

- Select **Save**.

3. Is the [Classification] correct?

- If not, select **Actions > Edit Classification** and set appropriately.
- ~~Next,~~ select **Edit** and choose the matching form.
- Make sure all fields are filled out on the new form~~, as some may have appeared and are blank.~~

○

4. Review the ~~remainder of~~ the ticket details, including any custom fields, the description, and the ticket feed ~~(prior comments and actions on the ticket).~~

5. ~~To take action on the ticket,~~ Select **Actions > Update** > **New Status** >

- **In Process,** if you are working on it but don't yet have a solution.
- **Waiting on Customer,** need feedback from customer to come up with a solution .
  - ~~If you need to get additional information from the customer or need them to clarify their question.~~
  - ~~If you have a solution but are not sure it will solve the problem and need their feedback, or multiple solutions are possible.~~

- **Resolved**,~~ if~~ you ~~are sure you~~ understood the customer's question and have the right solution for them.

Warning: Do not manually set the status to **Closed**.

Ok how do i insert a warning or tip box without breaking the ordered list?

    - ~~In your comments, include language like, "If you need additional help, please let me know."~~
- **Cancelled**, ~~if it is~~ not a ticket (i.e. automated email, test ticket, etc).

6. In the **Comment** field,

- Enter a message for the customer~~, or select a pre-written **Template** as a starter for your message.~~
- OR Enter a comment for other technicians then select **Make comments private (only visible to CIT - Ticketing users).**

7. Optional: modify or remove the **Notify** recipients. The **Requestor** is always pre-selected for notification.

- The drop-down includes other ticket contacts. If you need to notify someone not in the list, enter their NetID under **Notify Other People**. (include this?)

8.Select **Save**.

Update Membership **of TeamDynamix Support Groups**✅

(transfer article to IT@C)

https://it.cornell.edu/teamdynamix/update-membership-teamdynamix-support-groups

Jp suggested changes in purple

Disclaimer: This information is based on the release of TeamDynamix 11.4 from Fall 2021

Summary
How to update the membership of groups for teamdynamix.

Purpose of Groups

TeamDynamix uses groups for two purposes:

1. Groups ~~can be~~ ~~affiliated with~~ connected to a Ticketing application ~~and~~ ~~tickets~~ can ~~be~~ have tickets assigned to them.
2. Access to reports, knowledge base articles and other ~~things~~ features ~~can be~~ restricted to members of certain groups.

Requests for Group Changes

To submit requests, application admins and group managers may create a ticket ~~and assign it to CIT - ES - Academic & Support Services in the CIT - Ticketing application~~ or ~~should~~ email tdx-support@cornell.edu.

Be sure to include the following information in the request:

1. The name(s) of the application(s) involved.
2. The name(s) of the group(s) involved.
3. The Cornell NetID(s) and name(s) of the people involved.
4. ~~The Cornell NetIDs of the people involved.~~

Designated Group Managers ~~can manage membership of their groups~~

What can group managers do?(h3)

Group managers maintain their groups by effectively keeping everything organized. Additionally, each group can have one or more managers.

Further, they have many responsibilities such as,

- Managing the memberships of the group
- Adding and removing people from the group who are already members of their application.
- Moving members from one group to another.

Note: membership in a group doesn't grant a person access to a ticketing application, or grant a technician user license.

How to add/remove a group member(h3)

Requesting to be a Group Manager(h3)

You may request to be group manager by contacting the admin of the application you want to manage (e.g. contact CIT Ticketing to be admin of CIT - Ticketing).

Include steps on

-how to request to be group manager of an application

submit a request through tdnext to become a manager of a specific application

-how to add/remove a member from a group

-manage memberships of the group

-each group can have 1 or more managers

-to be made managers contact their admin or submit a ticket using a link (through tdnext?)

-can add and remove ppl from the group who are already members of their ticketing application

(more important features: adding, moving, removing users)(removing them from group doesn't remove their access from tdx - they need to submit a ticket central access to remove their permissions)

~~designated group managers can manage membership of the groups they manage. Adding application action still requires~~

~~application administrators to send requests to create a ticket or tdx-support@cornell.edu.~~

In **TDNext** >Click on the People tab>Click on Groups in the left pane>Search for your group>you should see a list of current group members. **To add group members**: Click on the green tab "+Add Group Members"

Overview and Management of Ticket Response Templates✅

https://it.cornell.edu/teamdynamix/overview-and-management-ticket-response-templates

Jp suggested edits in purple

- Use TDAdmin consistently throughout
- Add sentence in 3rd paragraph that if u want access to edit templates, contact assistance through an application admin for the specific ticketing application to get admin permissions
  - Just added it to the beginning of the article instead so the reader would know that info upfront

Summary

How to create and manage response templates as an admin.

What Are Response Templates?

Disclaimer: In order to access and ~~create~~ modify Response Templates, you will need TDAdmin access as a system administrator or ticketing app administrator.

When technicians are processing tickets, ~~the same actions are often taken for a given type of ticket submission. In addition,~~ it is important ~~for~~ they ~~technician~~ ~~to~~ inform the client ~~of the~~ with ~~chosen action via~~ update comments through Response Templates.

Response Templates allow for consistent processing of tickets by automatically updating comments and requestor name, ~~even~~ when multiple technicians are processing similar items. Additionally, they provide quick, "canned responses" to clients when responding to tickets.

~~When updating a ticket, the comments can be automatically generated (including requestor name) by selecting a Response Template option~~. Learn more about Response Templates in our “Requesting and Using Response Templates” article.

~~Although each response template is configured to have its own text, they can also be grouped into categories for similar types of responses.~~

~~The configuration can be found at TDAdmin > Applications > Ticketing Application > Response Template > + New.~~

~~Creating~~ Accessing and Editing Response Templates(h2)

Note: You ~~will~~ may need to create a Response Template Category before creating a template.

locating response templates(h3)

~~Administrators can create Response Templates to allow technicians and other users of the Ticketing Application(s)~~

~~Response Templates enable technicians to provide consistent, standardized messaging and reduce the time needed to re-type or copy and paste text that they often re-use.~~

~~You can~~ to find existing Response Templates by a Ticketing App group, use these following steps: ~~the lists of existing Response Templates by:~~

~~**TDAdmin** > by selecting **Applications > [Ticketing Application] > Response Templates.**~~

1. Log on to Teamdynamix Sandbox and select Administrators (TDAdmin).
2. Click the hamburger icon on the top left
3. Select the Applications button.
4. Select a group with the type Ticketing App whose templates you want to access

5. Navigate to the left hand side then scroll to Response Templates

~~On this page, you can view all existing response templates and their associated categories.~~

- ~~**Create** a new response template: Click **+ New** at the top of the page.~~
- ~~**Modify** an existing repsonse template: Click the name of any Response Template to edit its text.~~
- ~~**Delete** an unused Response Template: Click **Delete** to the right of any Response Template row.~~

(necessary bullets?)

~~Response Template Configuration~~ Creating and Editing Response Templates (h3)

There are a variety of fields that you can specify to configure response templates as needed. The following fields are editable:

1. Log on to TDAdmin
2. Click the hamburger icon on the top left
3. Select the Applications button.
4. Select a group with the type Ticketing App whose templates you want to access
5. Navigate to the left hand side then scroll to Response Templates
6. Select a Response Template you would like to edit.

7. **Category**: The category associated with the response template. Categories can be created and modified in **Admin** under **Applications > [Ticketing Application] > Response Template Categories.**
8. **Name**: The name associated with the response template.
9. **Description**: The description associated with the response template.
10. **Comments**: The text that will be inserted when the response template is selected by a technician.
11. **Insert Template Tag**: This dropdown can be used to include ticket information in the response template content. For instance, you can select the **RequestorFirstName** option to insert the first name of the requestor on the ticket. At the top of the page, click **Generate Preview** to get an idea of what the response template will look like.

Note: here that the available template tags are *not* the same as are available to Notification Templates due to Response Templates not supporting HTML content.

Deleting Response Templates

The time may come when administrators wish to delete unused or old response templates. To do this they can navigate to **Applications > [Ticketing Application] >**

Response Templates and click the *Delete* link at the far right of the row/template which needs to be deleted.

Note: This action is permanent and cannot be undone, so be sure you are deleting the proper template when performing this action.

Search for Users in TeamDynamix✅

(transfer article to IT@C)

https://it.cornell.edu/teamdynamix/search-users-teamdynamix

Change from first person to 2nd

Confused on which method to search that the article is referring to or is this an outdated method?
Go to tdnext>people application> then search…?

Summary

How to search for a user within tdx

~~Description~~ Overview

Most search boxes in ~~the system~~ TDNext function in a similar manner.

~~For example, if you are searching for someone in a "Notify" field,~~

~~the system will first attempt to show you users that are already associated with that ticket, requestor, responsible, reviewer, etc. Once you start typing a Username or NetID the system will attempt to find that user. However, the input fields are limited to returning five of the top results.~~

~~Steps to Follow~~ Search for Users(h2)

Note: These methods vary depending on desktop layout as every desktop is different.

Using the people application (h3)

This method may be useful to someone who needs to do a detailed search for a user or customer.

1. Navigate to TDNext
2. Select the waffle icon on the top left hand side of the window.
3. Scroll and select the People application from the menu. A new tab will open.
4. Enter the NetID or name of the person you’re searching for in the Search Text field.
5. Select any options that apply to your search
6. Select Search.

Note: Alternatively, Enter the Account/Department name and/or the Primary Group to help narrow down your search.

~~Here is an example. If I type "jenn" in an input field the system will return the 5 most likely results. As you can see, Jennifer and Jenny are returned in the results.~~

~~In an attempt to narrow things down further I type "Jennifer" - but there are still more that 5 people with the name Jennifer in the system.~~

~~OK so now I am really going to narrow it down and type the full name "Jennifer Davis".~~

~~Well, there are four Jennifer Davis' and one Jennifer Davison. So that didn't work. What to do now? Click the magnifying glass for a full user search.~~

~~Now when I search for Jennifer Davis in the full user search I can find the correct person.~~

~~Usually most of the user searches are not this tricky, often the system will be able to find the person you want without too much searching. Keep in mind that this search method works in a similar way for NetIDs. If you are searching for "netid1" you will see results like "netid11" or "netid123", etc. Adding the "@" symbol after the NetID may also help narrow the results.~~

Using the search bar on the desktop (h3)

1. Navigate to TDNext
2. Enter the NetID or name into the search field on the top right of the desktop.
3. Select the search icon. A new tab will open.
4. Optional: Select the filter icon on the top right of the window then select the applicable options to refine the search.
5. Select a result to open up Person Detail to view more information. A new window will open.