Routing Email Addresses to TeamDynamix at Cornell ✅ (this seems like a better fitting title than the other one but adding "Cornell" may be redundant)

Overview

Routing email addresses in TeamDynamix is a simple task that'll allow you to create tickets for the same group or multiple email addresses. there are you can use to set things up. Furthermore, we will show you 5 methods to help you complete the process.

*Note: At Cornell, group email tends to go to *Exchange Group Accounts* (EGAs) (may be best to mention ega in the direct text since it won't explain ega again after the overview section)

Possible Links to describe ega's in more detail:
- [Link 1](#)

Method 1: Separated EGAs

(I think presenting the best method for most users as the first method would help in saving the user time)

We recommend this method as this allows others to work with the original mailbox while a clean copy is preserved for TeamDynamix.
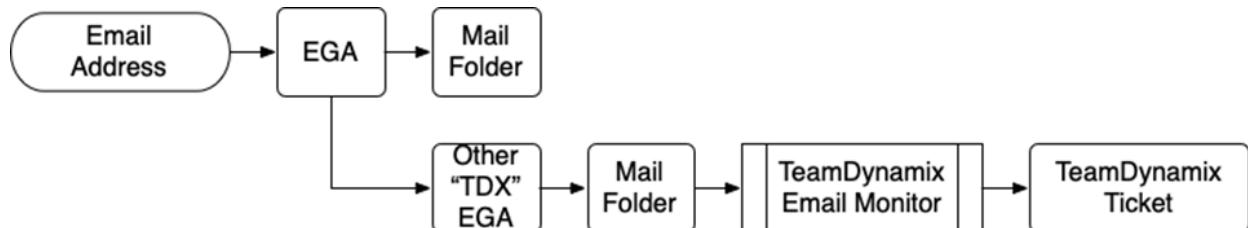
Method 2: Multiple EGAs

By following Method 1, you can simply add as many EGAs as needed to allow room for expansion. This works best if the group you're working with already has multiple EGAs set up.

Email Address → EGA → Mail Folder

EGA → Other "TDX" EGA → Mail Folder → TeamDynamix Email Monitor → TeamDynamix Ticket

Email Address → EGA → Mail Folder
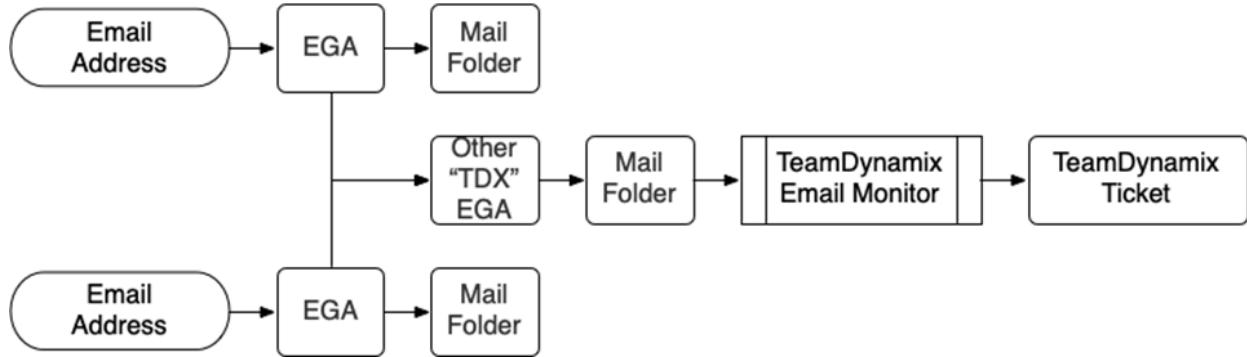
Method 3: EGA With Multiple Email Addresses

Method 3 allows you to use multiple email addresses for one or more EGAs. Cornell's Exchange Group Account (EGA) service allows EGA admins to configure multiple email addresses for the same EGA using

Cornell's Exchange Account Manager (EAM) tool. (unsure if this

should be a side note and if it's important to the reader)

Email Address

Email Address → EGA → Mail Folder

Email Address → Other "TDX" EGA → Mail Folder → TeamDynamix Email Monitor → TeamDynamix Ticket
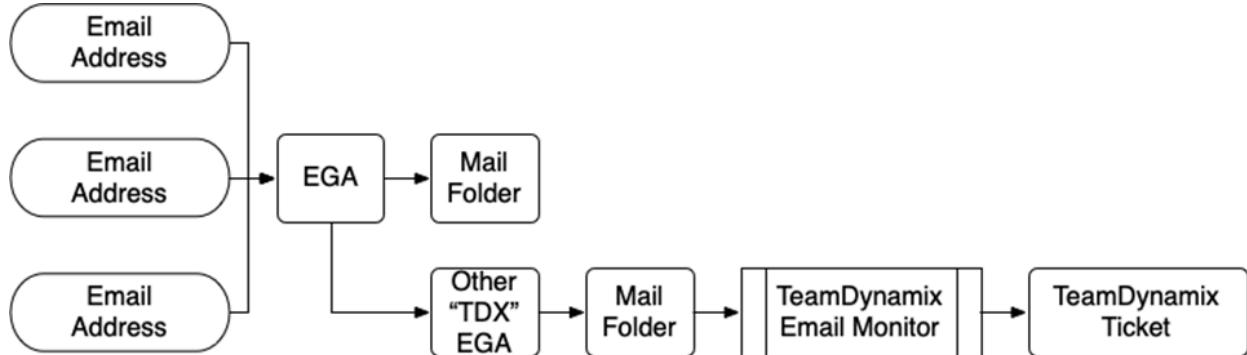
Method 4: Multiple Email Addresses and EGAs

Using a combination of methods 2 and 3, method 4 is helpful for those who want to use multiple email addresses along with multiple EGAs.
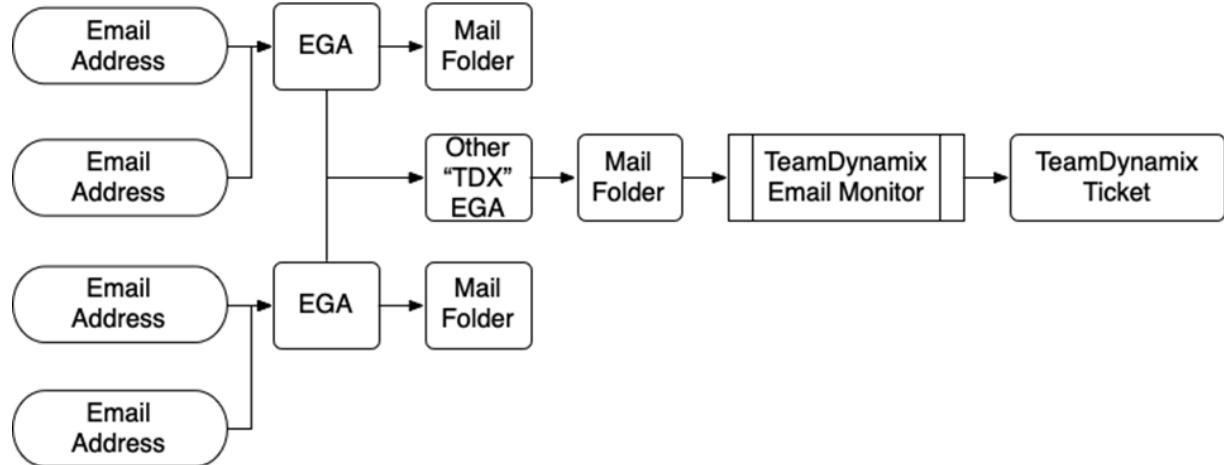
Method 5: Single EGA and Email Address

Though this is a possible method, this is **not recommended** since it prevents future flexibility and introduces future instability.

For example, having multiple people simultaneously automating processes, accessing, and manipulating processes in the same mail folder may produce unintended results.

Find Tickets in TeamDynamix✅

summary
Learn multiple ways on how to locate tickets in TeamDynamix.

Note: Refresh your page before taking a ticket as it may not reflect the latest status (e.g. assigned to another technician).

Before taking ownership of a ticket, ~~you can~~ check the icon at the top left (is it specific enough?) to see if anyone else is currently viewing the same ticket.

Service Request ID:	8675309	👤 1

~~There are multiple ways~~ Methods to locate tickets in TeamDynamix:

1. Use the ~~Out of the box~~ "Assigned to Me" filter in the Tickets section
   1. Go to cit ticketing + how to get there first
   2. ~~note you can~~ Click on the "Assigned to Me" filter icon in the ~~upper-right~~ left hand side ~~corner~~ of the "Tickets" section.

(would be better to explain how to get to the filters to change it?)(find it to actually put the steps)

Note: This shows tickets assigned to you, not tickets assigned to groups in which you are a member.

3. ~~Filters and saved searches~~ (too redundant? Maybe only include the saved searches method)
   (change name of the steps to be more specific about what they're for)

~~4. Select one or more fields to filter.~~

~~5. Click "Apply" to apply the filter(s).~~

~~1. Type in the "Search" field what you're searching for.~~

~~2. Click the "Save Search" button to save your recent search result.~~

~~3. Click the "My Searches" button to view your search history.~~

1. **A custom report**

Many TDNext applications have a way to create reports. For Technicians, you will likely ~~most likely you would~~ create

reports within the CIT - Ticketing application. To create a report:

1. Log in to TDNext
2. Click waffle icon
3. Select the "CIT - Ticketing" application
4. Click "+Report" on the ribbon and select "Report"

A desktop, using either built-in desktop modules or custom reports (unsure if this procedure needs to stay or not)(maybe it can be its own separate article?)

There are multiple types of desktops within TDNext: (lots of IT use this method so keep - would be better if detailed and understandable)

- ~~Desktops defined in the Desktops application.~~
- ~~Application-specific desktops, many but not all applications have their~~

~~own desktop, such as the desktop for Projects/Workspaces application".~~

~~The Desktops application lets you create multiple desktops, one of which will be the default desktop displayed when you open the application.~~

~~Other applications can have exactly one desktop. Additionally, an application's desktop can only show data specific to that application.~~

+ New desktop to create desktop as the desktop is automatically created for them

CIT - Ticketing / Reports / CIT - (their department), then look for the module that displays "Open Tickets" for that group

Client Portal / Ticket Requests - "My Submitted Tickets"

CIT - Ticketing / Reports / ITSM - Major Incident (MI) - "MI - All Open Major Incidents"

Tickets / General - "My Flagged Tickets"

The "My Work" application

"My Work" is the TeamDynamix application that shows you tasks and other TeamDynamix work assigned directly to you or to a group you're a member of, all in one place.

1. Go to the waffle icon, then select

Search for Users in TeamDynamix✅

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

Overview (using overview versus description seems a bit more descriptive in what the section is for)

To begin, most search boxes in the TeamDynamix system function similarly. 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. (make this a separate box?)

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

Using the name "Jennifer Davis" as an example, Here is how you would search for a user within TeamDynamix:

1. Typing "jenn" in the input field ~~the system~~ will return the 5 most likely results.

img

As you can see, Jennifer and Jenny are returned in the results.

2. Narrow down the search more by typing the full name, in this case, "Jennifer Davis".

   Img

3. Click on the magnifying glass in the ** for a full user search to narrow down results more when there are multiple matches.

   Img

4. From the advanced search you can see more detailed results to find the user you're looking for.

Img

From here, you should be able to find the user (needed?)

Note: [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?) ~~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.