TeamDynamix: ITSM First Level Support Training

Version 3.3

UNH ITSM First Level Support Training Reference Manual

with Labs

*Provided by Client Services – January 5, 2018

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Contents

Introduction

This document will provide information of the processes and work flows in TeamDynamix that are specific to the Service Desk and the ATSC. The **TeamDynamix: ITSM Foundation Training** course is a pre-requisite for this **TeamDynamix: ITSM First Level Support Training** course.

Incoming Support Channels

Incoming support channels handled by First Level Support include:

- Phone calls to the Service Desk
- In Person walkup visits to ATSC
- Questions submitted through web forms
- Voice mails

This document and course will focus specifically on Service Desk calls and ATSC walkups.

TeamDynamix Foundations- A Quick Review

TeamDynamix is a service management, project, portfolio, and software application specifically designed for higher education and used by a variety of organizations within the University System.

With **TeamDynamix**, our users have the ability to view ticket status and what is actually written in their tickets.

CAUTION!! As we enter information into our TeamDynamix tickets, we need to continually be aware that our clients now have the ability to view status and see what is written in their ticket.

Logging Into TeamDynamix Test

1. Go to **usnhgateway.org**
2. Under **Test & Development Environments**
3. Go to **TeamDynamix**
4. Select **TD Test**

After logging into TeamDynamix, verify that you have the **IT Service Management** segment tab. If you are missing the segment tab:

1. Click Applications Menu button  (waffle).
2. Click **IT Service Management**
3. The selected segment tab will be created on the top navigation for future quick-access.

The **IT Service Management** segment is the tab where you will create your tickets. This segment can be customized to feature the selections most valuable to your work.

The Desktop in the IT Service Management Segment

In the *Foundations* course, we learned that the **Desktop** segment in TDx is totally customizable to your preferences to use in doing your work.

The **IT Service Management** segment also has the *customize Desktop* feature, allowing that segment to be set up to your personal preferences. With the ability to customize your **IT Service Management Desktop,** you are then able to do 100% of your ITSM work in just the **IT Service Management** tab alone.

Lab Exercise One: Setting Up Your ITSM Desktop

With this lab you will customize your IT Service Management Desktop for the TDx Test environment. After your lab is complete, you will already have your IT Service Management Desktop ready for your first shift!

Login to **Production** TeamDynamix - URL: https://td.unh.edu/tdnext/login.aspx

<u>To customize your IT Service Management Desktop:</u>

1. Click on **Edit Tickets Desktop**

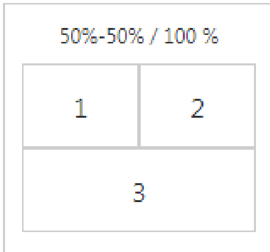
   

2. Click **Edit Layout** hyperlink

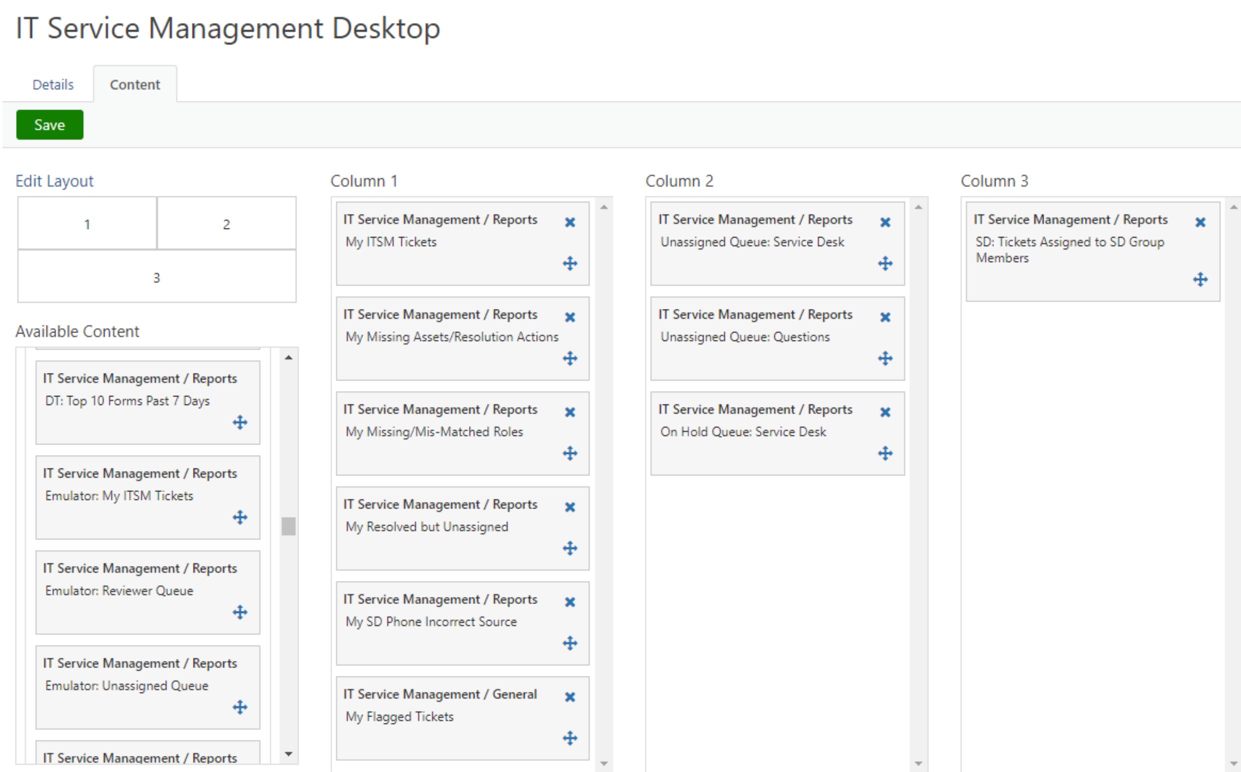
   (Found under the Save button)

3. For View, select the **50%-50% / 100%** view. (This view is found at the end of the list)



4. Drag *modules* from the IT Service Management list on the left into the columns shown below. These drop and drag modules can be moved to a different location as you choose. **Note**: you will only see modules for the TDx Groups of which you are a member, so your list of modules may be different than another's. Ignore any modules with <Emulator> in the title – they are used in other areas.

Column 1:	**IT Service Management / Reports**	My ITSM Tickets
	IT Service Management / Reports	My Missing Assets / Resolution Actions
	IT Service Management / Reports	My Missing/Mis-Matched Roles
	IT Service Management / Reports	My Resolved but Unassigned
	IT Service Management / Reports	My SD Phone Incorrect Source
	IT Service Management / General	My Flagged Tickets
Column 2:	**IT Service Management / Reports**	Unassigned Queue: Service Desk
	IT Service Management /Reports	Unassigned Queue: Questions
	IT Service Management / Reports	On Hold Queue: Service Desk
Column 3:	**IT Service Management / Reports**	SD: Tickets Assigned to SD Group Members



5. When complete, click **SAVE** then close the Edit Desktop window. Click **Refresh** in the top left to see the result.

End Lab

TeamDynamix ITSM

Service Requests vs. Incidents

In TeamDynamix, all tickets are identified as either a Service Request or an Incident – so they are easily recognized as the type of ticket they are without opening the ticket and searching.

- **Service Request** – A **Service Request** is a user **request** for information or advice, or for a standard change (a pre-approved change that is low risk, relatively common and follows a procedure) or for access to an IT **service**. One example of a standard **request** is a password reset.

- **Incident** – An **Incident** is defined as an unplanned interruption to an IT Service or reduction in the quality of an IT service. Some examples include Canvas is offline, Banner is not available or a telephone is not working.

  The following chart provides examples of the differences between a Service Request and an Incident.

Service Request	Incident
Password Reset	Network is unavailable
Parent Portal Password Assistance	Phone trouble ticket
Transcript Request	Web sites down
Name change request	Email not being found in OWA
How to use a program	SPSS installation files not available
Banner Finance permissions change request	Banner Finance Error

As you work in your tickets you will find that sometimes you will need to change the request type of your ticket.

When to change ticket type You may find that you are working a Service Request ticket generated as a question submitted through the web. As you are working the ticket, you discover the issue is really an Incident and not a Service Request.

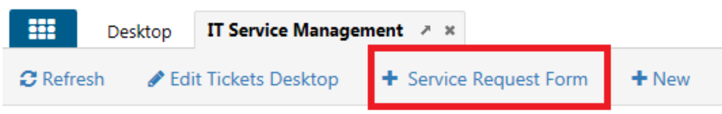
How to change request type Under the **Actions** menu select **Edit Classification.** Using the dropdown switch between **Incident** or **Service Request.**

Creating Tickets with Ticket Forms / Templates

Ticket Forms and Ticket Templates provide two different types of functionality. Ticket Forms add fields required by the Service Owner. Ticket Templates automatically fill in fields in your Ticket. Ticket Forms and Templates are time-savers for the TDx user as well as ensuring consistency across all tickets and that Service Owners have the information they need to work on the ticket.

How to create a new ticket

In the **IT Service Management** segment, click +**Service Request Form** *or* **+New**



Special Considerations While Filling out Ticket Fields

There are several important special considerations to remember when entering data in the new ticket fields:

Form: Tickets are classified as either a **Service Request** or an **Incident**. There are many service-specific Ticket Forms available to use. They add Custom Attribute fields the service owner needs, and may fill in some other fields with the values they want. It is important to become familiar with the forms available.

Template: Ticket Templates in TDx prepopulate data ensuring fields are entered correctly and are consistent across all similar tickets in the System. *While anyone has the ability to create Templates in TDx, the SOP for the Service Desk will be to only have one person creating templates for the Group. This ensures against duplicate templates. Note: SD personnel should ONLY use SD templates. Service Desk Templates will be identified with "SD" in the title.*

Service: In the **Service** field, *search for what the user is requesting help with*. Examples include Wise, student email, or WiFi. Browsing in the Service field limits results to 5 items while a search using the Search icon provides the complete list of results. Once a service is selected, its corresponding Type will auto-populate in most cases. There will be times where the call is not related to any IT Service. The service called **Non UNH IT/AT Service** will be applicable in that situation, for example International Travel Registry or Learn for Life.

Lab Exercise Two: Searching the Service Field

When creating a ticket, the **Service** field is required for both **Service Requests** and **Incidents**. A Service is defined as what the client is requesting or trying to access: what are they asking for? What are they trying to do? For example, the Service for employee email is **Email Services / Faculty & Staff Email (Exchange)** and is searchable by searching these various email terms: *Outlook, Email, and Exchange*.

There are two ways to search for Services in TDx: in the **Service field** itself, or using the **Search icon** for the complete list in the service catalogue. Browsing in the Service field limits results to 5 items while a search using the Search icon provides the complete list of results.

Lab setup   Logging Into TeamDynamix Test

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1. Click Applications Menu  button (waffle).
2. Click **IT Service Management**

Click +New Service Request to open a new ticket. Scroll to the Service Field.

In the following chart, search the items in the "Search Term" column using searches in the Service field type-ahead box and again in the Search icon. Record the number of results for each search in the space provided. Note that when you select the Service of your choice, the **Type field** populates with the **Service Owner** by default.

Search Term	Service Field	Search Icon
Outlook	2	2

Email		
Exchange		3
Wildcats		2
SPSS	1	
Telecom		
Canvas		2
Banner		

End Lab

Type: This field is usually auto-populated when a selection is made in the Service field. If Type doesn't fill in automatically, check to see if there is a Ticket Form available for that Service.

Source: If the contact is made by phone, the Service Desk must select **SD Phone** as the source. Non-Service Desk phone calls use **Phone**. The ATSC will select **In Person** as the source.

Requestor: This is the field to identify the user/client. Type in the **username from CAMP** and press enter. If the *requestor is not found*, then the following are available on an as-needed basis:

- Prior Student User
- Former Employee User
- Applicant User
- Parent User
- Unknown/Guest User
- Missing User – to be used only **if this person should be in TDx, but isn't**

If you use one of these special Requestors, you must **put the person's actual name and username (if applicable) into the Description field**. *Missing User* tickets will be monitored to find people who need to be added manually to TDx – explain why the person should be added in the ticket feed.

Role: Select the Role that best fits the problem the Requestor is calling about, e.g. a student worker calling about Canvas or WildcatsMail would be classified as a Student, while the same person calling about Exchange email or Banner access would be classified as Staff. For Employees, you may need to ask if they are Staff or Faculty. **Note**: Use ***Guest/Other*** for any undefined requestors, including all of the above special requestors except Parent User.

Special Users and their Roles

Special User	Role
Applicant User	Guest/Other
Emeritus Faculty	Faculty
Former Employee User	Guest/Other
Missing User	Any applicable role
Parent User	Parent
Prior Student User	Guest/Other
Unknown/Guest User	Guest/Other

Email and Phone: Confirm the email address on the Contact Card in the upper right and add email address(es) here if missing or incorrect. For tickets that aren't being closed right away, be sure to collect Phone number(s). For email problems, collect an alternate Email . More than one email or phone can be entered in these free text fields.

Asset/CI: Searchable field for product (or service) which resolved the ticket. The designers have added special assets to this field for those tickets that are neither standard nor common. Some of these special assets include:

- I Don't Know
- Unlisted Local Software (e.g. Facebook, PGP encryption, Thunderbird)
- Unlisted Device (e.g. palm pilot, blackberry, raspberry pi)
- Unspecified by Client
- Referral – External (e.g. refer to Microsoft)
- Referral – UNH-USNH (e.g. refer to Registrar or Advising)

These special assets are to be used with great caution, and **use must be justified** in Details or Feed. Reports will check for use of these Assets to not only determine new items to add but also to verify they are not being abused.

Responsible: when assigning tickets, **always** assign to group, not to an individual. If you need to assign to an individual, it is VERY important to remember to always assign to a group FIRST, SAVE the ticket, then assign to the individual. This will be rare for First Level Support staff. Our norm is to always assign to a group.

> **To view members of a group**, click the Responsible field magnifying glass and search the group name. In results list, click the "View" link to the right of the group name.

Note: If you have an existing ticket, you can easily change the Responsible group:

1. Click green **Actions** button.
2. Select **Reassign Incident** or **Reassign Service Request** and enter Group name.
3. Add comment "Assigning to xxxx Group" and Save.

Status: The status *New* is the default setting as you create your ticket. If assigning to a group (including your own group), leave the status as **New**. If you need to work on the ticket yourself, choose **In Process**. Use **Resolved at First Level** if closing without the ticket going to any other support group.

Resolution Action: If closing the ticket, you must change this from *Pending…* to the action you took. For more details and warnings, refer to the end of the next section: *Updating your Ticket*.

***Appendix A. Table of Ticket Fields** is a chart that shows the ticket field definitions in the order they are presented in the ticket.*

Lab Exercise Three: Creating Tickets

Lab setup   Logging Into TeamDynamix Test

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After logging into TeamDynamix, verify that you have the **IT Service Management** segment tab. If you are missing the segment tab:

5. Click Applications Menu  button (waffle).
6. Click **IT Service Management**

The **IT Service Management** segment is the tab where you will create your tickets. This segment can be customized to feature the selections most valuable to your work.

Begin Lab   For each item below, you will create a ticket in TDx Test for the scenario provided. For this lab, the left column represents ticket fields, the right column provides information whether the field is auto populated or provides instructions how to complete the field for the ticket.

3A. Scenario: Claire TeamMember calls reporting her account is now locked out after changing her password this morning. Create a ticket representing this **Service Request** scenario.

AD Account Locked (Ticket Template)

Click   +Service Request Form

Form	Accept Default
Template	***Select*** **SD-AD Account Locked**
Service	Autofill
Type (Owner Group)	Autofill
Source	Autofill
Requestor	***Select user*** Claire TeamMember
Role	Autofill
Secondary Contact	n/a
Email	n/a
Phone	n/a
Request Title/Summary	Autofill

Description	***Type this info into the Description field:*** User calls today reporting that she is locked out after a password change this morning. Verified ID info, Unlocked AD Account Had user lock/unlock windows device using new password Opened Outlook, confirmed incoming email, no Windows Security Box. Resolved.
Asset/CI	***Type*** "(AD)". Select **Active Directory (AD)**
Responsible	Autofill
Status	Autofill (Resolved at First Level)
Resolution Action	Autofill
Priority	Accept default
Attachment	n/a
Click **SAVE**	***WRITE TICKET NUMBER HERE:***

3B. Scenario: A Service Desk caller reports that her phone has no dial tone and she needs to have it fixed. For this exercise you will use a customized **Form** that will add additional fields which are required to resolve this ticket. This ticket is an **Incident** and will be assigned to a Level Two group.

Telephone Trouble (Incident Ticket Form)

Click +Service Request Form

Form	***Search*** "phone" ***Select*** **Report a Problem – Telephone Trouble**
Template	Template field has been removed
Service	Autofill
Type (Owner Group)	Autofill
Source	SD Phone
Requestor	***Select*** Hannah TeamMember
Role	staff
Secondary Contact	n/a
Email	n/a
Phone	603-111-2222

Request Title/Summary	Autofill
Please provide phone # of device experiencing issue	2-3344
Location	**UNH – Holloway Commons** (Physical location of problem phone)
Location Room	Use dropdown to select room of your choice
Description	Click the **?** icon. Enter in appropriate info
Asset/CI	autofill
Responsible	autofill
Status	Autofill
Resolution Action	autofill
KB Article	n/a
Priority	autofill
Attachment	n/a
***Click* SAVE**	***WRITE TICKET NUMBER HERE:***

3C. Scenario: A student walks up to the ATSC desk. They have been having problems connecting to UNH Secure on their phone lately; it's getting really annoying and they need help to fix it. You remove the existing "UNH Secure" connection, connect to UNH Public and re-install Cloudpath. The phone successfully connects to UNH Secure and the student is thankful for the help provided.

This will create a **Service Request** ticket. A template will be used to create this ticket; remember the ATSC is *NOT required* to use the SD templates.

WiFi Question (non-SD Ticket Template)

Click +Service Request Form

Form	Service Request (default)
Template	***Select* Wireless (WiFi) Question**
Service	Autofill: Networks & Connectivity / Wireless Network (WiFi)
Type (Owner Group)	Autofill: UNH IT / ETS Local Area Network (LAN)

Source	***Change source to*** **In Person**
Requestor	***Select*** Ana TeamMember
Role	***Change role to*** **Student**
Secondary Contact	n/a
Email	n/a
Phone	n/a
Request Title/Summary	***Type a short description of the request***
Description	***Type*** In greater detail, describe the steps you took to resolve Ana's WiFi connection
Asset/CI	***Type*** **"**WiFi" and you will see *Networks & Connectivity / Wireless Network (WiFi)* – but that is a Service, not an Asset. ***Type*** "wireless network". Select: **Wireless Network: Security-Enabled**
Responsible	***Type*** in your username, **select your name**
Status	***Select*** **Resolved at First Level**
Resolution Action	***Select*** **Provided Deliverable/Configuration**
Priority	Autofill
Attachment	n/a
Click **SAVE**	***WRITE TICKET NUMBER HERE:***

3D. An applicant calls the Service Desk requesting assistance on how to find what the status of their application to UNH is. You know that they will need their username and ID # so they can create a password. You verify their identity and walk them through setting their password and logging into Webcat.

Applicant Login Help (Manual Entry)

Click +Service Request Form

Form	Accept default: Service Request
Template	n/a
Service	***Using*** **Search icon** (magnifying glass) search: **"**Password". ***Select*** **Password Management**
Type (Owner Group)	Autofill: CS Accounts Administration
Source	**SD Phone**
Requestor	***Type*** hh123 – no results found. Instead, ***Select*** **Applicant User**

Role	***Select* Guest/Other**
Secondary Contact	n/a
Email	n/a
Phone	n/a
Request Title/Summary	***Type*** Applicant Login Help
Description	***Type*** Applicant name & Username: Holly Hopeful hh123 Applicant calls today requesting assistance logging into Webcat so she can check the status of her application. Verified ID info, walked user thru setting password and logging into Webcat. She knows to check status under the Application menu.
Asset/CI	***Search*** Webcat. ***Select* Webcat**
Responsible	***Search*** your username. ***Select* your name** to take ownership of ticket
Status	***Select* Resolved at First Level**
Resolution Action	***Select* Provide Account/Password Help**
Priority	Accept default
Attachment	n/a
***Click* SAVE**	***WRITE TICKET NUMBER HERE:***

End Lab

Updating Existing Tickets

From the **Actions** button, use the drop-down to select **Update.** The **Update** window has three important functions:

- Update Ticket Status
- Communicate with Users
- Set Resolution Action / Close ticket

Update Ticket Status

The status *New* is the default setting as you create your ticket.

New – Entered, not yet reviewed or assigned to an individual
Open – Ticket has been viewed, acknowledged, and assigned
In Process – Work underway
On Hold – Awaiting action from the requestor
Resolved at First Level – Work completed by First Level groups (Service Desk/ATSC) without escalation. ***Note:*** tickets may pass between the first level groups and still qualify for Resolved at First Level.

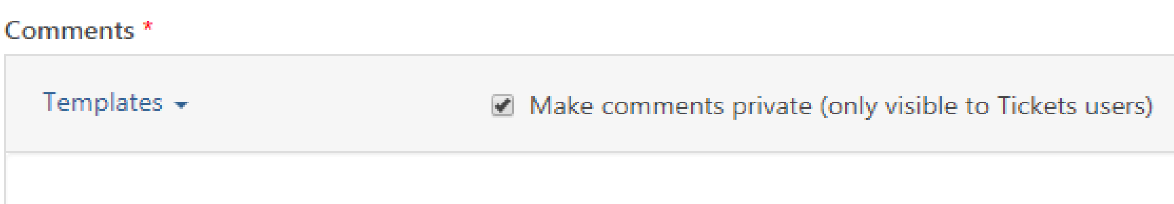
Closed – Work completed
Cancelled – Ticket declined and/or withdrawn
Pending – Awaiting information

Important information regarding resolving a Service Desk Ticket. If the Service Desk resolves the issue at the time of the call, then use **Resolved at First Level** for status. If the ticket leaves our queue to another group and comes back, then **CLOSED** should be selected for status.

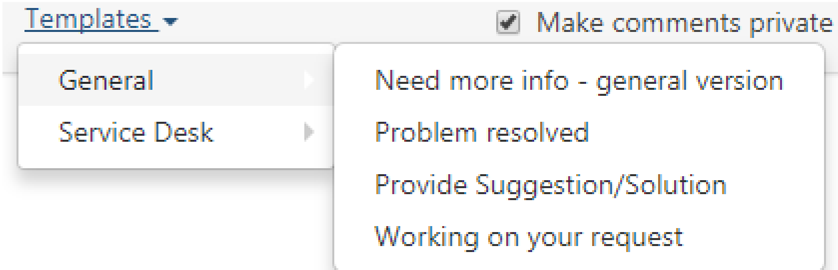
The **Cancel** status should be avoided, and only used when instructed.

Communicate with Users

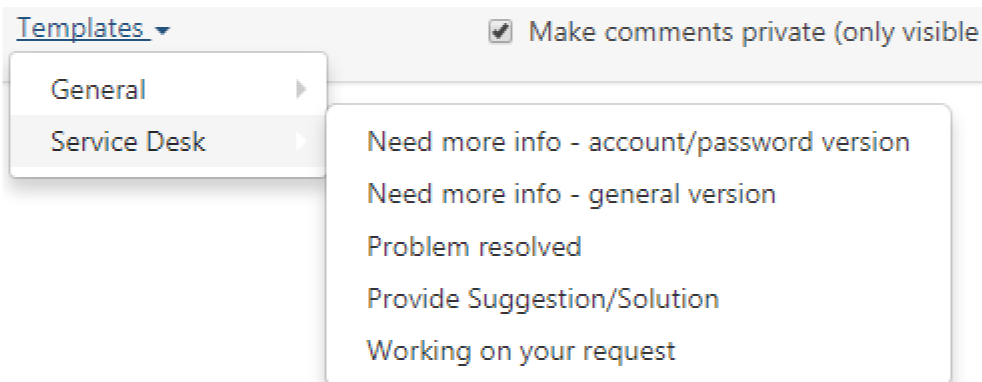
The **Update** screen is where you can send communications to your client. Note that the **Response Templates** drop down is found only on the Update Window Comments section.



Templates > General:



Templates > Service Desk:

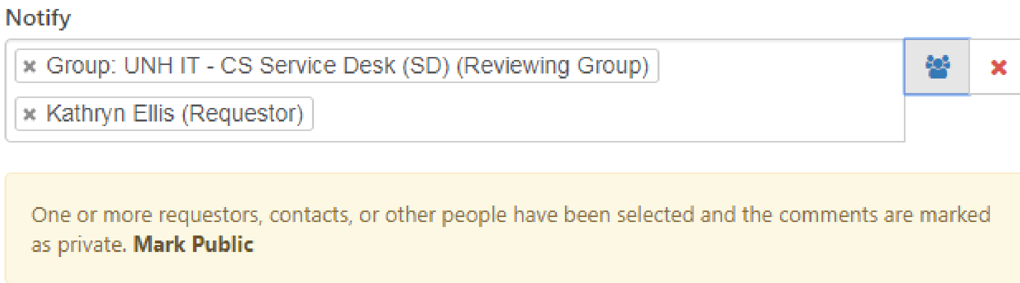


The main difference between General Response templates and Service Desk Response templates is the Service Desk Response templates provide customized footers, whereas the General Response template does not.

If the **"Make comments private (only visible to Tickets users)"** is checked, the requestor will be unable to see that particular comment through the **Client Portal**. You can view the Client Portal from within TDx by clicking on the **Waffle** and selecting Client Portal with the cell phone icon or through the public link: https://td.unh.edu/TDClient/Home/

The **Notify, Notify Other People** and **Other Email Addresses** fields determine who will receive a copy of your Comment.

The **Notify** field provides a drop down feature however has no arrow. If you Click in the field you can see any **groups or people already associated with the ticket**. You can select one *or more* from the list. If you click on the "many people" icon, it will notify all associated users and groups. In some cases you may see a warning if your comment is marked private, as shown below.



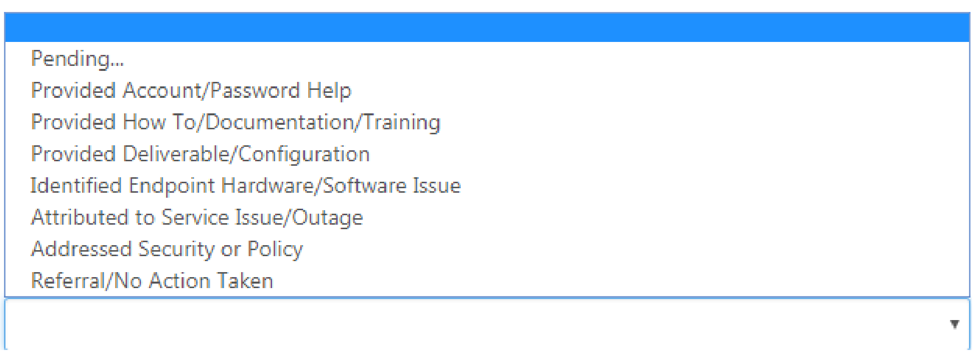
Quick Trick: If you click the **Mark Public** link in the warning, it will uncheck your "Make Comments Private" box for you.

Notify Other People allows you to send your comment to **any person within TDx**.

Other Email Address allows you to send your comment to **any email address** not already in TDx. Use this for any Alternate Email address provided in the ticket notes.

Set Resolution Action

This will allow reporting on what action **solved** the problem. When a ticket is created the Set Resolution Action defaults to Pending, but you must update this when you Resolve or Close the ticket.

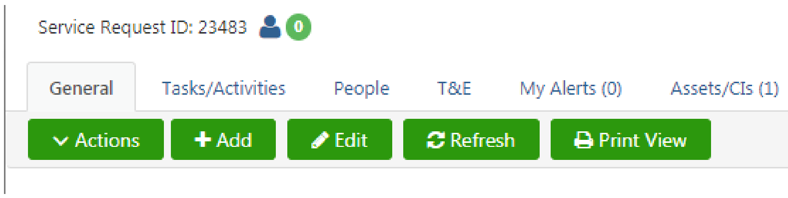


A Word of Caution: TDx will allow a ticket to be closed without updating **Resolution Action**. While the system will allow you to save the ticket with the Resolution Action set to Pending, every closed ticket *must have an* ***updated*** *Resolution Action selected.* The ***My Missing Assets/Resolution Actions*** desktop report module will show you tickets where you forgot to do this.

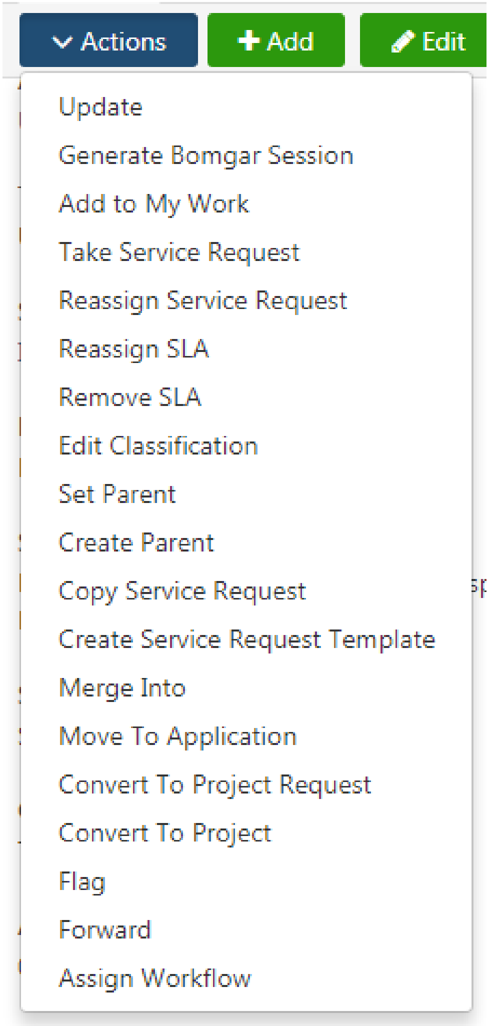
Knowledge Base Article Radio Button at this point is not functional and cannot be removed from the window. Once this feature is available procedures will be developed for use. Just ignore this option for now.

The Actions Menu Button

The **Actions** Menu Button provides a list of valuable features for your tickets. Note that different people may see different options under this menu, based on TDx user type.



In the screenshot of the **Actions** button below, you will see the list of available actions. This document will highlight the main features that you can use on day-one. Any actions not mentioned in the descriptions to the right should be ignored.



Update. Described earlier in this document.

Take Service Request or Take Incident. Select this to take responsibility for this ticket.

Reassign Service Request or Reassign Incident. How you assign ticket to another group within IT.

Reassign SLA. Changes the expected response time for the ticket.

Remove SLA. DO NOT USE this option.

Edit Classification. Changes **Service Request** to **Incident** or vice versa. We'll use this mostly when a Question comes in (as a Service Request) but reports a problem so needs to be made an Incident. No data is lost when making the switch. ***Caution****: You may need to* ***select a different Ticket Form*** *under the Edit button to change the classification for a specific service.*

Set Parent. Relate to existing problem ticket. Check with Supervisor first.

Copy Service Request ** A note is added to the new ticket that it was copied from the original.

Merge Into ** Might make sense when there are multiple tickets from the same user for the same questions, for example.

Flag. Setting a flag is a way to the mark tickets that you want to watch. This feature is optional. To view your flagged tickets, add the Desktop Module for *My Flagged Tickets* in your IT Service Management Desktop.

**** These options are not ready to be used at this time.**

Lab Exercise Four: Sending Communications

In a previous call, you helped Claire TeamMember after her AD account was locked out. She has called back because she is locked out again. After working a little more with Claire, you tell her that you would like to consult with your colleagues to determine how best to proceed with her issue. Verifying her identity again, you unlock her for now so she can remain productive. You also get a contact number for her.

Search for Ticket, Reopen, Assign to Level Two and send Communication to Client

1. In Lab exercise 3A, you saved a ticket number. Write this ticket number here: ___________
2. In the IT Service Management segment, type the ticket number in the search field in the top right hand corner and hit Enter. Your ticket loads.
3. Click on the **Actions** button, select **Update**. Using the drop-down, select "**Open"** in the **New Status** field.
4. In the **Comment** field, type that she continues to gets locked and would like her SLA to look at her computer. Click **SAVE.**
5. Click on the **Actions** button again, this time selecting "**Reassign Service Request"**.
6. Under the **"New Responsibility"** field, search for and select "**CS Desktop Support (Group)"**
7. In the **Comments** field (required), type *Assign to Desktop Support.* Click **SAVE.**
8. Now, we are going to notify Claire. Click on the **Actions** button, select "**Update**".
9. Click "**Templates**" drop down and select **Service Desk** > **Working on your Request.**
10. In the Comments field, modify the message to read:
    "Your Support Ticket # xxxxx has been reopened and reassigned. You should be hearing from your Desktop tech soon."
11. Under the **Notify** field, select **CS Desktop Support** and **Claire,** Requestor. Since you want Claire to be able to see this note in her My Tickets Client Portal, this comment needs to be made Public. **Uncheck the box** for "Make comments private". Click **SAVE**.
12. Review your modified ticket. The **Feed** is found at the bottom and you can see all of your comments in sequential order.

End Lab

Handling Special Types of Tickets

Auto-Generated Tickets

Auto-Generated tickets fall in several categories. They will be found in different areas of ITSM, depending on the details of the ticket. Some of these processes are still being worked on, so this information is subject to revision in the future.

Compromised Account tickets will be found by **filtering** under **Tickets** in the left navigation bar. To see closed as well as open tickets, in the Filter options, click **[Select all]** in the **Current Status** drop down. Search for the requestor’s **username** in the **Text Search** box. Click **Apply** to see the filtered ticket results.

How to Search for Tickets in the ITSM Segment

The two main ways to search for tickets is by ***ticket number*** or ***filter on tickets.***

Quick search using ticket # or key words

Click Applications menu button  (waffle) located in the upper-let hand corner and choose the **IT Service Management** application. A tab will be created on the top navigation for future quick-access.

In the IT Service Management segment, select the word **Tickets** in the left-hand navigator to see all open tickets.

In the search box located on the top-right of the screen, search by ticket number or key words to locate the ticket. The ticket will open in a pop-up window.

Using filtering options

Select the word **Tickets** in the left-hand navigator to see all open tickets.

Click on the green filter button  in the upper right-hand corner of screen.

Fill out search criteria fields and select **Apply**.

Note: *If you would like to save the search for future use, click on* ***Save Search*** *button on top navigator. Type in Search name in* ***Save As*** *field and* ***Save****. Please do NOT check* *"global." Saved searches are accessible by clicking on **My Searches** button to the left of **Save Search**.*

Appendix A. Table of Ticket Fields

Click on little blue question marks for specific field information when filling in ticket forms.

* An asterisk on the field designates that it is a required field.

Form *	If you know the name of the form you can type ahead. If you don't know the name of the form, select from dropdown arrow and use slider to choose an Incident or Service Request form.
Template	Templates in TDx prepopulate data fields which ensure fields are entered correctly to be consistent across all tickets in the System. While anyone has the ability to create Templates in TDx, the SOP for the Service Desk will be to only have one person creating templates for the Group. This ensures against duplicate templates and general chaos in the Template section. Note: SD personnel ONLY should use SD templates. Service Desk Templates will be identified with "SD" in the title.
Service *	The Service is what the client is requesting or trying to do. Service is defaulted by the form. If you need to add/change the service, begin typing the name of the service and choose from quick-search below the field, or Click the magnifying glass to search.
Type (Owner Group) *	Type is defaulted by Service. The type serves to classify the nature of the necessary work.
Source *	Indicates where a ticket originated such as: email, phone, or web.
Requestor *	Start typing name or username in field or search via magnifying glass. Checking the *'Notify Responsible'* check box sends the Requestor an email notification. ***Note**: If user is not listed, add person by clicking on* **+** *icon. Add user's First Name, Last Name, and enter Primary and Alert Notification Email addresses.*
Role *	Choose requestor's role from dropdown list.
Secondary Contact Person?	If applicable, select **Yes** from drop-down. You will be prompted to provide the Secondary Contact's Name.
Email	Provide alternate email info here. Optional field if you need to contact the requestor or secondary contact person by a method other than campus email. This address will not receive automatic notifications from the system, but will be used to correspond with the Requestor or Secondary Contact Person. Multiple entries are allowed in this field.

Phone	Provide alternate phone info here. Optional field if you need to contact the requestor or secondary contact person by a method other than campus email. The phone number at which the Requestor or Secondary Contact Person can be reached. Multiple entries are allowed in this field.
Request Title/Summary *	Enter a short description to explain the nature of a ticket.
Description *	Enter the full details of a ticket including supplementary information that may aid in resolving it.
Asset/CI *	An Asset/CI is the product(s) or service(s) involved in fulfilling/resolving the request. Search for an Asset by following these steps: 1. In Asset field, select magnifying glass. A new window opens. 2. Click inside 'Type(s)' box in upper-right corner. Select Asset box. 3. Go to 'User' field under **Asset Filtering** and Click red 'x' to remove User from Asset filtering section. 4. Go to 'Search' field in upper-left hand corner. Enter keywords into Search field and select **Search** button. Check desired Asset(s) and select **Insert Checked** button, then select **Save** to add the asset(s) to the ticket.
Responsible *	Select user or group that will be assigned ticket by either typing the Name/Username or choosing from quick-search below the field, or clicking on the magnifying glass. If searching for groups using magnifying glass, select the **Groups** radio button at top of page after clicking on magnifying glass. Enter group name in search box and **Search**. ***Note:*** *Checking the 'Notify Responsible' check box sends the responsible user an email notification. Responsible field doesn't have to be filled out immediately, but if it is left blank the ticket will be unassigned.*
Status *	**Status** – This is a framework and each group should define how they are using these designations. The following are suggested definitions: *New* – Entered, not yet reviewed and assigned *Open* – Ticket has been viewed, acknowledged, and assigned *In Process* – Work underway *On Hold* – Awaiting action from the requestor *Resolved at First Level* – Select this option if ticket is resolved at First Level. – see detailed discussion of use of this status. *Closed* – Work completed *Cancelled* – Ticket declined and/or withdrawn *Pending* – Awaiting information
Resolution Action *	Defaults to Pending. Must be updated when closing or resolving a ticket. Should reflect the action taken to resolve the ticket.
Priority	Select Low, Medium, High or Critical from drop-down. Does NOT affect notifications for speed of response. That is controlled by SLA Levels instead which you access from the Edit menu on an existing ticket. Not available when creating a new ticket.

Attachment	Add an attachment by following these steps: 1. Open ticket. 2. Click green **Add** button. 3. Click **Attachment.** 4. Browse, select and open file. 5. Click green **Upload** button. ***Note:*** To select multiple attachments, hold down keyboard <Ctrl> key when selecting files.

TeamDynamix Support

Search the UNH IT TeamDynamix Knowledge Base
https://unh.edu/it/kb/category/business-tools-services/teamdynamix/57/

Register for UNH TeamDynamix Classes
https://ittraining.unh.edu/apps/ssr

Join the TeamDynamix Community
https://community.teamdynamix.com/

Submit a UNH TeamDynamix Support Form
https://td.unh.edu/TDClient/Requests/ServiceDet?ID=120