Manage a Ticket in TeamDynamix (TDX)

This Manage a Ticket in TeamDynamix (TDX) Tip Sheet is for individual members who manage CHESS service desk tickets.

Introduction

This tip sheet is designed to guide ESS members in managing CHESS service desk tickets using TDX technician portal. It covers the following key areas:

- Using standard searches and filters
- Working on tickets: commenting, updating, and changing responsibility
- Tracking time on tickets

Managing a Ticket

1. Navigate to sdportal.chess.edu.
2. Scroll down screen and select **Users**.

NOTE: Bookmark this URL for future reference and quick access to the workspace.

3. Enter your e-mail address when prompted and select **Continue with SSO**. The log in will open the main landing page.
4. Select **View Applications** to search for tickets.
5. Select **Tickets** to open the Tickets landing page.

Searching for Tickets

There are two methods for searching for tickets: Searches and Reports.

- Searches are a quick way to filter specific criteria for a ticket. Functionality is very limited, and reports are the preferred method to refine information.
- Reports are more configurable and can be saved for later use.

Using Reports

1. Select **Standard Reports** on the left-hand side of the screen and select the desired standard report.
2. Create new reports from the header row by selecting **Reports>New Report.**
3. Select **Ticket Reports** to access custom reports that you have configured.

Working a Ticket

Finding Tickets

Locate tickets assigned to you using standard searches or reports.

Actions on a Ticket

- **Comment:** Log information into the ticket.
- **Update:** Change the **status**, add comments, communicate with the customer, assign, transfer or close the ticket.

Ticket Statuses

- **Open** (shows in **Assigned To Me**): New, Open, In Process
- **Resolved** will resolve the case, it will automatically change to Closed after 10 working days
- The statuses **Resolved, Closed** and **Cancelled** will remove tickets from your open ticket list(s)

Changing Ticket Responsibility

1. Select **Actions** from the ticket window.

- **Take Ticket** to assign yourself if the ticket is unassigned.
- **Reassign Service Request** to assign to another person or yourself if already assigned.

NOTE: Tickets already assigned cannot be taken, only reassigned.

Ticket Tasks

- Subtasks can be generated within a ticket for others to complete actions required for the ticket to be completed.
- Tasks can be assigned to different people while the main ticket has a separate responsible person.
- A ticket cannot be completed until the tasks are marked complete.
- Completed tasks are marked with a green check mark.

NOTE: Even after all tasks are complete, the ticket **status** must be updated before closing.

Time Tracking

1. Select **Actions>Update.**

2. In the **Time Type** field, select **Case Time Spent**.
3. Enter the time spent on the case in hours.

NOTE: Decimal values are used to record time instead of minutes (for example, one and a half hours is entered as 1.5).

4. Tracking time spent on the ticket does not affect the ticket status. The status must be manually updated.