# TeamDynamix Technician Handbook

# 1 Welcome!

Hello, and welcome to the TeamDynamix community! TeamDynamix is a tool designed specifically for higher education to help institutions manage their projects, services, assets, and more.
TeamDynamix has several types of user licenses. This handbook is for people with a Technician license, it shows users how to achieve daily functions within TeamDynamix.

# 2 A brief introduction to IT Service Management

IT service management is a set of capabilities to clarify and improve the quality of IT services. ITIL® is one framework for IT service management.
IT service management calls out many processes that can help IT better understand and manage what it does. Here are a few examples:

- Change management, to understand what is changing, such as when a new service is being created
- Incident management, to address unplanned disruptions to work
- Service catalog management, to clarify what services are available to users
- Service request management, to help users order common services such as a new phone

EDUCAUSE's Center for Analysis and Research (ECAR) has published several papers on IT service management in higher education[1].
Discussing IT service management in detail is outside the scope of this handbook, but we will talk about ways that TeamDynamix can help you as a technician with creating and updating tickets, managing assets, managing knowledge base entries, managing the service catalog, and other tools that support IT service management.

# 3 TeamDynamix fundamentals

This section is a high-level overview of the parts of TeamDynamix. Each organization can use TeamDynamix in a different way, so this section also includes pointers to help you understand what your organization has made available to you.

## 3.1 TeamDynamix's interfaces

TeamDynamix has four interfaces:

- **TDAdmin**: Administrative setup for TeamDynamix, used by administrators. TDAdmin is not available for Team Members so you can safely ignore this.
- **TDNext**: The application suite interface for employees, used by Team Members and any other licensed users.

[1] See http://www.educause.edu/ecar/research-publications

- **TDClient**: Client/end-user interface, used by everyone including Team Members.
- **TDMobile**: An interface designed for devices that cannot access TDClient or TDNext. It provides basic and responsive access to some parts of TeamDynamix.

All TeamDynamix interfaces are accessed via the web. Your organization will have a domain name and URL for each of these interfaces that looks like this:

- https://[[your-td-domain]/TDNext/
- https://[[your-td-domain]/TDClient/
- https://[[your-td-domain]/TDMobile/

## 3.2 Logging in

Your TeamDynamix administrator will need to tell you what username and password to use to log into TeamDynamix, depending on how user records are created and how authentication has been set up.

### 3.2.1 User records

Everyone who logs into TeamDynamix needs a user record. Your administrator is responsible for ensuring your user record is created.
Your organization may pre-populate user records, for example via a batch job or API integration, or your organization may have "self-registration" templates that create user records using single sign-on or LDAP information.

### 3.2.2 Authentication (passwords)

Your organization may have enabled single sign-on. If so, when you try to log into TeamDynamix you may be redirected to your organization's login screen.
Or, your organization may have turned on LDAP-based authentication, so you log in via the TeamDynamix login screen but you use your organization's password.
Or, you may have a TeamDynamix-specific password that you need to get from your TeamDynamix administrator.

## 3.3 Seeing what access your administrator has granted you

Your TeamDynamix administrator can control what you have access to do in TeamDynamix in two ways:

1. Applications assigned to your user record, e.g. whether you have access to the "Assets/CIs[2]" application.
2. Permissions assigned to your security role, e.g. "Create and modify vendors of assets" for the Assets/CIs application.

[2] "CI" stands for Configuration Item, a term used in the ITSM Service Asset and Configuration Management process. CIs are components that help provide a service, and can be anything from a hardware asset to a policy document.

To see what applications you can access, log into TDNext[3] and click on the Application Menu. You should see a list of icons and applications, such as "Desktop". "Desktop" is always the first application and "Help" is always the last application; the remaining applications are in alphabetical order. These are the applications you can access.

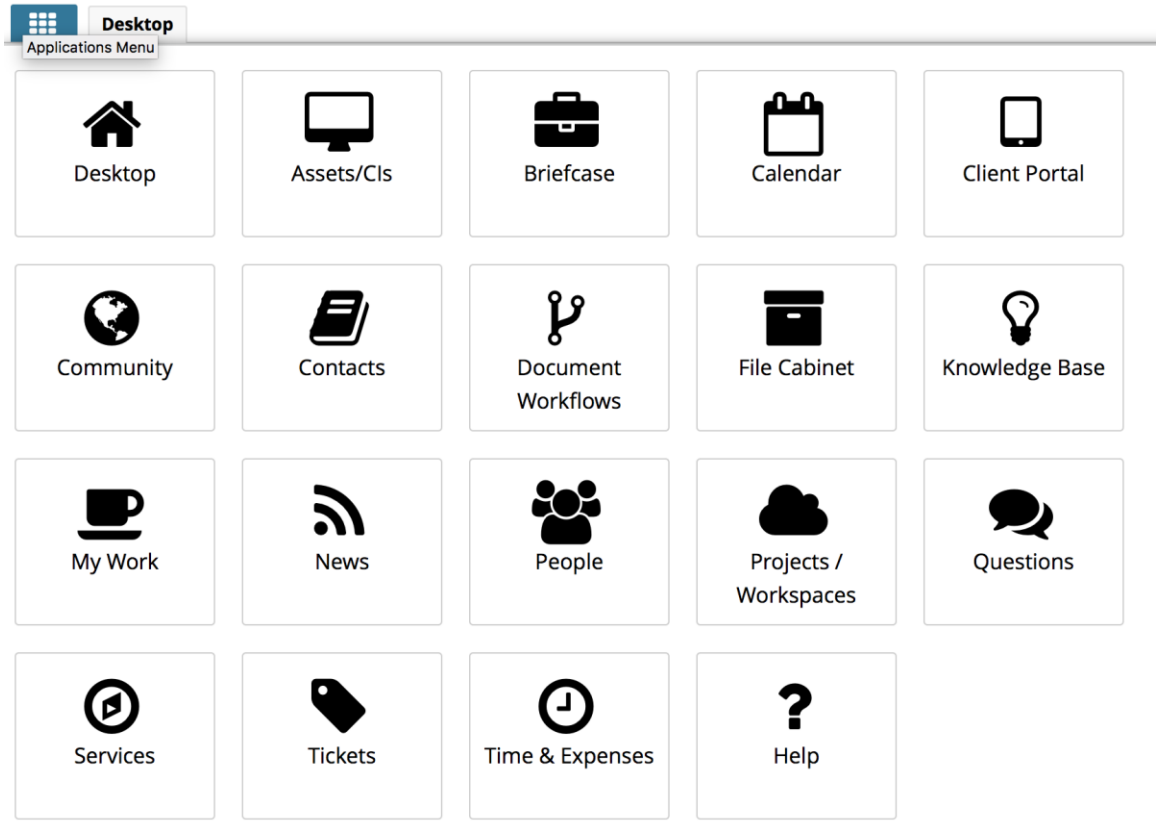


**Figure 1. All applications that can be made available to a technician. Applications such as Services, Knowledge Base, Client Portal, and Questions will take you to the client portal (TDClient).**

To see the TDClient-specific applications you can access, try logging into TDClient[4]. The list of applications at the top (e.g. "Services") are the TDClient applications you can access.

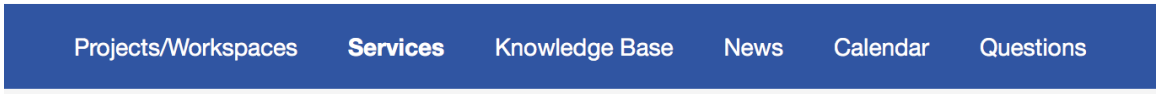


**Figure 2. All TDClient applications that can be made available to a technician.**

[3] If you cannot log in to TDNext:
- Verify you have the correct URL,
- You may not have a user record in TeamDynamix,
- Your user record may not have access to the "TDNext" application, or
- Your username or password may be incorrect.

[4] If you cannot log in to TDClient:
- Verify you have the correct URL,
- You may not have a user record in TeamDynamix, or
- Your username or password may be incorrect.

It is harder to know, without asking your TeamDynamix administrator, what your security role lets you do. In this handbook we will identify things you may or may not be able to do based on your security role.

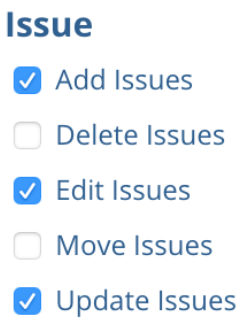


**Figure 3. An example of a TeamDynamix administrator's options when defining a security role. There is no way to know your security role's permissions for sure without asking your administrator.**

*If you read something in this guide that you cannot do in your TeamDynamix environment, it is possible that your security role does not allow you access. Please work with your TeamDynamix administrator to review your security role's permissions.*

## 3.4 Applications you may be able to see

You may or may not have access to see these applications. Remember, as described in section 3.3 your administrator can control which applications you can access as well as what you can do within each application.

| Application | Brief description | See also |
|---|---|---|
| Assets/CIs (TDNext) | Manage assets, product types, contracts, and licenses. | |
| Community (TDNext) | Link to the TeamDynamix Community. | Section 3.5 |
| Desktop (TDNext) | View delivered modules and custom reports all within a dashboard like application. | Section 0 |
| Knowledge Base (TDClient) | Captures internal, user-facing, or public knowledge articles. | Section 0 |
| My Work (TDNext) | A collection of everything TeamDynamix that pertains to the authenticated user. | Section 0. |
| People (TDNext) | The people records within TeamDynamix. | *Not covered in this handbook.* |
| Project Requests (TDClient) | View your Not Submitted and Submitted project requests. | See the Project Team Member Handbook. |

| | | |
|---|---|---|
| Projects / Workspaces (TDClient) | Interact with Projects and/or Workspaces in which you are a resource on. Access all detail pertaining to a project. | See the Project Team Member Handbook. |
| Questions (TDClient) | A forum like application enabling users to ask questions of other TeamDynamix users within your organization. | Section 10.1. |
| Services (TDClient) | Review services offered and make a request for the work to be completed—for example, a new project request. | Section 6. |
| Time & Expenses | Time or effort tracking as well as any expense entry for a project. | Section 0. |
| Ticketing applications (e.g. "Tickets" or "Human Resources") | There can be several configured Ticketing applications; the default application is called "Tickets." Others can be added. | Section 5. |

This guide will cover all these applications and what you can do in each, but feel free to skip the sections that are not relevant for your organization.

### 3.5 How to learn more

The TeamDynamix Community site is a great way to learn more about the product. You can also download manuals, ask questions, see release notes, and watch videos, such as TeamDynamix User Conference presentations.
Here's one way to access the TeamDynamix community site:

1. When logged into TDNext
2. Select the on the "Community" button[5] in the application menu
3. You may be prompted to register, if this is your first time using Community

Once you are on the Community site, notice there are several tabs at the top, as well as a search box.

## 4 The Knowledge Base

Knowledge bases are a way for users and employees alike to learn and address their issues by exercising self-service. By creating Knowledge Base entries, you can document common steps to addressing issues so that people can help themselves. In TeamDynamix, the "Knowledge Base" application lets you create Knowledge Base articles. These articles can go through a review/editing process to verify that they are accurate and will make sense to users. Knowledge Base articles can be kept

[5] If you do not see a "Community" button, your administrator may have disabled the application. Please ask them to re-enable the button.

private to a group, published to all logged-in clients, or published even to visitors who are not logged in.
Knowledge Base articles can also be related to tickets (see section 5.5.2), other knowledge base articles, or service catalog requests (see section 6.2).
Knowledge Base articles are different from the Questions application (section 10.1): Questions question and answers can be asked by any user, but Knowledge Base articles can only be created by employees. For example, someone with a client license can ask or answer a question but not be able to create a Knowledge Base article.

## 4.1 Creating a Knowledge Base article

To create a Knowledge Base article:

1. Log in to TDClient or TDNext
2. Select the "Knowledge Base" application
3. Click "Create article". (If you do not see this option, please ask your TeamDynamix administrator to grant your security role access to create Knowledge Base articles.)

If you need help filling out the fields, click the icon ( ) for contextual help. Click "Save" to save your draft Knowledge Base article.

## 4.2 Submitting a Knowledge Base article

If you see a "Status" field when editing your article, you have access to publish Knowledge Base articles. You can change the status to "Approved" and check the "Published to KB" box to make your Knowledge Base article visible to all users. However, if you do *not* see a "Status" field, you will see a greyed-out "Published to KB" checkbox when you edit your article. This means your role does not have permission to approve or publish articles to the Knowledge Base.
When editing your article, you should set the status to "Submitted". This will send your article through the review process.

## 4.3 Reviewing Knowledge Base articles

Your security role may have access to review Knowledge Base articles. To review articles:

1. Log into TDClient or TDNext
2. Select the "Knowledge Base" application
3. Click the "Articles Pending Review" link

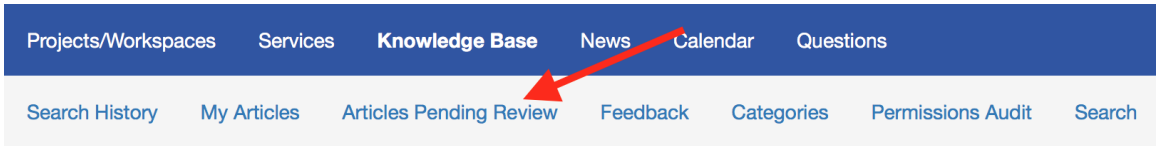


**Figure 4. The "articles pending review" link will show up if your role has access to review articles.**

If you do have this access, you will see a list of articles under review. You can edit these articles and/or click the "Approve" or "Reject" boxes.
When editing the article, you will have several sections you can edit:

| | |
|---|---|
| **Content** | The subject and body of the article |
| **Settings** | Other article settings, notably "Published to KB" |
| **Permissions** | This section allows you add the article to a category. Additionally you can select which viewing permissions to apply to the category directly to the article. Visibility permissions are granted to groups that are configured by TeamDynamix administrators. |
| **Related articles** | You can add relationships to other articles that will show up when users view this article. |
| **Files** | You can upload attachments that will be linked the Knowledge Base article. |
| **Read By** | This will show you which users have read the article. |

### 4.4 Browsing, searching, and linking to Knowledge Base articles

You, and other users, can find Knowledge Base articles available to you in several ways:

1. By browsing articles and article categories
2. By clicking on tags on articles to find other articles with those tags
3. By searching
4. By looking at the "popular articles," "recent articles," and "popular tags" widgets

Additionally, these Knowledge Base articles can be linked to a Service (see section 6.2) and they can be linked when they are relevant to specific tickets (see section 5.5.2).

## 5 Tickets and other ticketing applications

TeamDynamix allows an organization to have multiple ticketing applications. One ticketing application might be for IT issues and another might be for HR issues, for example. Each ticketing application has its own set of security roles; employees can be granted access to specific ticketing applications. This handbook covers how a ticketing application works from the perspective of a technician.

### 5.1 Ticket classifications

TeamDynamix offers five ticket classifications. For the most part, tickets act similarly no matter what their classification.

- Incident: Something is broken and it should not be broken, e.g. someone's computer is insufferably slow.

- Problem: The root cause of one or more incidents.
- Change: A change that affects an IT service, such as an upgrade. Changes often go through a review/approval workflow.
- Release: A ticket representing a set of changes.
- Service Request: A request for service, such as a request for a new phone or a computer.

Additionally, sometimes a ticket really needs to become a project: TeamDynamix can allow you to convert a ticket into a project request.

## 5.2 Sections of every ticketing application

To open a ticketing application, simply log in to TDNext, open the application menu, and click on the appropriate ticketing application, as described in section 3.4. Once you've opened the application, you will see several sections on the left side:

| Section | Description |
|---|---|
| Desktop | An application-specific desktop for ticketing. See section 0. |
| Groups | View group membership, along with what each user is working on within TeamDynamix. |
| Tickets | Shows all tickets with status class[6] of "New", "In Process", or "On Hold." |
| - Assigned To Me | Shows all tickets with status class of "New", "In Process", or "On Hold" that the authenticated user is responsible for.<br>*Note: This shows tickets assigned to you, not tickets assigned to groups in which you are a member.* |
| - Awaiting My Review | Shows all tickets with status class of "New", "In Process", or "On Hold" that the authenticated user is the reviewer for.<br>*Note: This shows tickets both assigned to you and to groups in which you are a member.* |
| - Awaiting My Approval | Shows all tickets with status class of "New", "In Process", or "On Hold" that are in a workflow and the current workflow step requires approval from the authenticated user. |
| - Awaiting Approval | Shows all tickets with status class of "New", "In Process", or "On hold" that are in a workflow waiting on approval. |
| - Incidents | Shows all tickets with status class of "New", "In Process", or "On Hold" with classification "Incident". |
| - Problems | Shows all tickets with status class of "New", "In Process", or "On Hold" with classification "Problem". |

[6] Status values can be customized but each status value must map to five standard status classes.

| | |
|---|---|
| - Changes | Shows all tickets with status class of "New", "In Process", or "On Hold" with classification "Change". |
| - Releases | Shows all tickets with status class of "New", "In Process", or "On Hold" with classification "Release". |
| - Service Requests | Shows all tickets with status class of "New", "In Process", or "On Hold" with classification "Service Request". |
| Standard Reports | These are TeamDynamix built-in reports. Please note the filter icon (  ) in the upper-right corner of each of these reports. |
| - Ticket Aging | Shows tickets by age by priority level.<br>To learn more about this report, please go to this report and click the "Help" button. That will take you to a Knowledge Base article that describes the report. |
| - Ticket Performance | Summarizes tickets by account, type, and responsible party.<br>To learn more about this report, please go to this report and click the "Help" button. That will take you to a Knowledge Base article that describes the report. |
| - Ticket Count Report | Counts tickets. Use the filter icon to change how tickets are grouped.<br>To learn more about this report, please go to this report and click the "Help" button. That will take you to a Knowledge Base article that describes the report. |
| - Ticket History | To learn more about this report, please go to this report and click the "Help" button. That will take you to a Knowledge Base article that describes the report. |
| - Ticket Calendar | To learn more about this report, please go to this report and click the "Help" button. That will take you to a Knowledge Base article that describes the report. |
| Ticket Reports | *This section only shows up if you can see any reports that you or your organization have created.* |

## 5.3 Parts of a ticket

When you click on a ticket, it opens into its own window. Tickets have many fields, such as the requestor and responsibility. Tickets also have several sections, such as tasks associated with the ticket. Finally, tickets have actions, such as updating the ticket.

### 5.3.1 Ticket fields

Tickets in TeamDynamix can have many fields. Here's a highlight of the most important fields. Please note that this is not an exhaustive list, and that your organization needs to define how it uses these fields. Additionally, your organization may define custom fields for a given ticket type.

| Field | Description |
|---|---|
| Classification | Can be “Incident,” “Problem,” “Change,” “Release,” or “Service Request”. Changing the classification is a permission limited by security role. If you have permission, you can change the classification by clicking the “Actions” button on a ticket and selecting “Edit Classification”. |
| ID | Every ticket has a numeric ID, e.g. “12345.” This number does not change even if the ticket classification changes. |
| Service, Ticket Type | These fields can be used to collect more information about what kind of ticket this is.<br>In particular, the “Ticket Type” value can be set to populate other ticket fields such as SLA and default responsibility. Custom attributes are associated with a Ticket Type, these attributes will display when the type is selected. |
| Creator, Requestor | These fields track who created the request, and who the requestor is. (i.e. the person who wants the outcome of this ticket). |
| Acct/Dept | This is usually the requestor’s account or department as defined in TeamDynamix. However, it can be set separately. |
| Title, Description | This is text information about this specific ticket. |
| Impact, Urgency, and Priority | TeamDynamix can be configured to calculate priority from impact and urgency. Priority can also be set without setting impact or urgency. |
| Reviewer | The (optional) person or group responsible for reviewing submitted tickets. |
| Responsibility | The person or group currently responsible for the ticket. |
| Status | The current status of the ticket. The status of the ticket is displayed in the top right corner of the ticket. |
| On Hold Until | If you use the special status class “On Hold,” you can specify a date upon which TeamDynamix will move the ticket back to its previous status. |

Again, your organization will need to define how it uses these fields, to ensure that everyone who is filling out or reviewing these fields knows what is expected. Otherwise, reports using these fields will not be accurate.

### 5.3.2 Ticket sections

When looking at a ticket, the tabs across the top are the ticket sections:

| Section | Description |
|---|---|
| General | Information about the ticket, including its current status, description, attributes, and feed. |
| Tasks/Activities | Any tasks that are associated with this ticket. |
| People | Any TeamDynamix user associated with this ticket. Whoever is listed here shows up in the "Notify" list whenever you update or comment on a ticket. |
| T&E | Time and expense information about this ticket. |
| My Alerts | Alerts you can create for a ticket, such as being alerted when the ticket is completed. |
| Assets/CIs | Any related assets or CIs for this ticket. You can add new related assets and see the existing ones. |
| Read By | Shows a list of TeamDynamix users that have viewed this ticket. |


**Figure 5. Tabs for ticket sections. Some classifications will also have a "Children" tab for tickets that roll up to the ticket being viewed.**

### 5.3.3 Ticket actions

Most of the activity taken on a ticket is accomplished by using the Actions button. Please see below that actions that are possible.

*Note: Options that show within in the Action button is dependent on your security role permissions.*

| Action | Description |
|---|---|
| Update | Change ticket status, add comments, and more. See section 5.5. |
| Take Incident | Set yourself as the responsible party for this ticket. |
| Assign Incident | Set someone else (a person or a group) as the responsible party for this ticket. |
| Assign SLA | Assign a defined service level agreement to this ticket, or remove the current SLA. Also allows you to "restart the clock" on the service level agreement. |
| Edit Classification | Change the ticket classification. |
| Set Parent | Choose a ticket to be the "parent ticket" for this ticket. This will establish a parent/child relationship between the two tickets. The current ticket stays open but is linked to the parent ticket. |

| | |
|---|---|
| Create Parent | Create a new ticket to be the "parent ticket" for this ticket. The current ticket stays open but is linked to the parent ticket. |
| Copy Incident | Copy most of the fields from the current ticket into a new ticket. |
| Create Ticket Template | Copy some of the fields from this ticket into a template that you can then apply to future tickets. See also section 5.7.4. |
| Merge Into | Eliminate this ticket by merging it into another ticket. The current ticket is deleted. This should be used for duplicate tickets. |
| Convert to Project Request | This ticket should be a project request instead. Create a project request for Portfolio Planning. The current ticket is deleted. |
| Flag/Unflag | Flag or unflag the ticket. You can then report on which tickets you have flagged (see section 9.1), or use the out-of-the-box desktop widget called "My Flagged Tickets" (see section 0). |
| Forward | Send an email copy of the ticket. This action is similar to creating a PDF copy of the ticket and emailing it. |
| Assign Workflow | Send the ticket through a defined workflow process. |

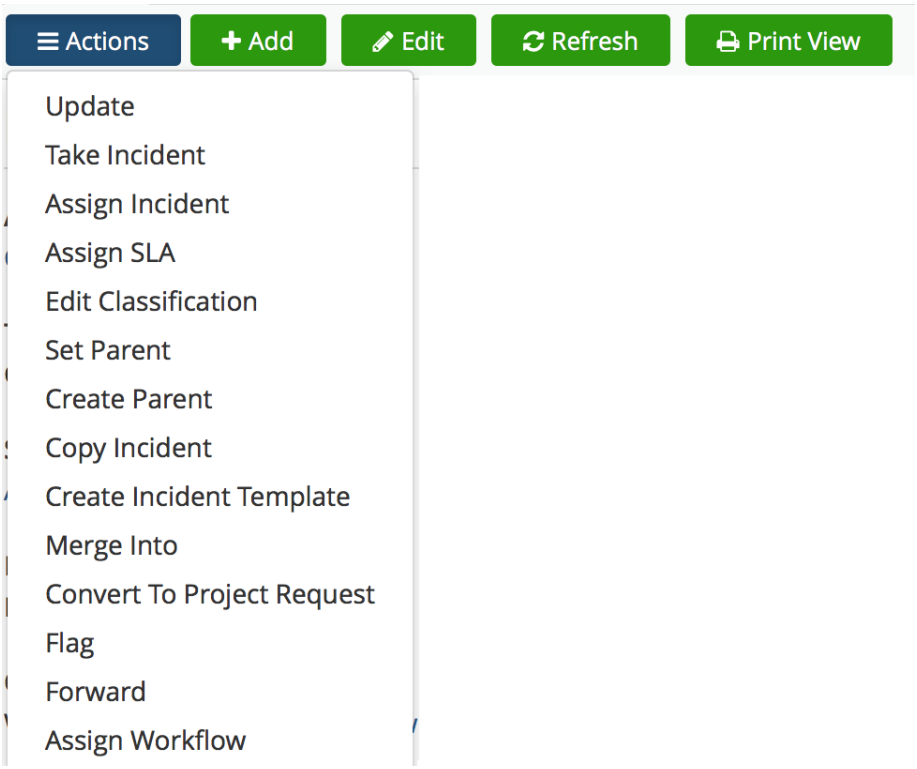


**Figure 6. Ticket actions for a ticket of classification "incident" that is not currently assigned to you.**

The Actions button is not the only that kicks up activity in the ticket. Other buttons worth mentioning at the "Add", "Edit", "Refresh", and "Print View" buttons. Read about their functionality below:

| | |
|---|---|
| Add | *When you click this button, you see the indented actions:* |
| Attachment | Add a file attachment (which you can also do when updating a ticket). |
| Task | Add an ad-hoc task to this ticket. |
| Task template | Add a set of tasks from a predefined task template. |
| Edit | Edit the fields on this ticket. You can edit the requestor, priority, or virtually any field described in section 5.3.1. |
| Refresh | Refresh buttons exist on nearly every page in TeamDynamix. If you have made a change and it is not reflected on the page, please click the refresh button. |
| Print View | Choose the sections of the ticket that you want to display. The print view also creates a QR code that links to the mobile version of the ticket. |

## 5.4 Finding and assigning tickets

There are multiple ways to locate tickets in TeamDynamix:

- Out of the box filters in the Tickets section, such as "Assigned to Me" (see section 5.2)
- Filters and saved searches (see section 5.4.1)
- A custom report (see section 9.1)
- A desktop, using either built-in desktop modules or custom reports (see section 0)
- The "My Work" application. (see section 0)

### 5.4.1 Filters and saved searches

From the "Tickets" section, note you can click on the filter icon (  ) in the upper-right corner. You can then choose one or more fields to filter. For example, if you wanted to see all the tickets with a specific requestor, you could choose the requestor in the filter and then click "Apply".
After you've done this search, note the "Save Search" button. You can save that search and run it later by selecting the "My Searches" button.

## 5.5 Updating and closing tickets

You can update any ticket that is assigned to you or a group that you are in. Additionally, depending on the ticketing application's security roles, you may be able to edit all tickets or tickets of a certain type.

### 5.5.1 Adding a comment

Every ticket has a feed. Adding a comment is the simplest way to record a feed entry and communicate with people about the ticket.

To add a comment to the feed, open the ticket, scroll down to the "Feed" section, and click "Comment".

You can choose whether your comment should be visible on the Client Portal, or private only to people who have the Tickets application[7]. You can also choose to notify people via email about your comment by selecting people from the "Notify" drop-down. If you want to notify others besides those listed, you need to use an update instead as described in section 5.5.2.

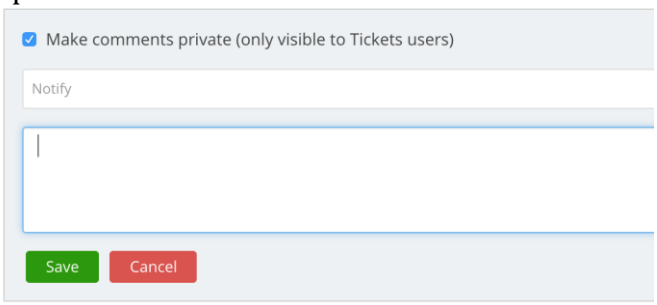


**Figure 7. Adding a comment.**

### 5.5.2 Updating the ticket

To change the ticket status or do more complicated updates than a simple comment, you need to update the ticket. To do this, open the ticket, and under the "Actions" button select "Update.[8]" The update window lets you do several things:

| | |
|---|---|
| New Status | Modify the status of the ticket. Your organization can change these statuses. Here are the meanings of the default status values:<br><br>• New: Ticket has been received but not acknowledged<br>• Open: Ticket has been acknowledged<br>• In Process: Someone is working on this ticket right now<br>• Resolved: Service Provider believes that this ticket should be closed<br>• Closed: All work is done on this ticket and the user agrees the ticket is complete |

[7] Typically, people who have the Tickets application are employees.
[8] If you do not see the "Update" option, your security role may not let you edit this ticket.

| | |
|---|---|
| | • Cancelled: The requestor (or Service Provider) has decided not to do this ticket<br>• On Hold: This ticket is waiting on something |
| Goes Off Hold<br>*(On Hold status only)* | The date on which this ticket should move back to its previous status. TeamDynamix will automatically change the status back on this date.<br>It is possible for your administrator to make this a required field for tickets in an "On Hold" state. |
| Time Type, Hours, | If you want or are expected to track how much time you spent on this ticket, then you can log the time type and amount of time here. |
| Comments | Any comments you have about this update. Note that you can make this update private. |
| Notification | Who should receive an email with this update. |
| Notify Other People | A type-ahead search that looks up other TeamDynamix user records so that they can receive this update. |
| Other Email Addresses | Any other email address(es) that should receive this update. |
| Attachment(s) | Files to add to the ticket's list of attachments. |
| Knowledge Base Article | You can link this ticket to an existing Knowledge Base article, or submit a new Knowledge Base article to relate to this ticket. (see section 0) |

Your update will be added to the feed. If you do not select anyone to notify, no one will receive an email notification.
By changing the status to a status in the "Closed" status class, you close the ticket.

## 5.6 Adding and managing ticket tasks

Tasks are pieces of work that need to be done for the overall ticket to be completed. For example, you might have a task for a group to check available disk space on a machine, or to provision an account. A task is in many respects a "mini-ticket". Tasks have fewer fields than a ticket, but still have a title, description, responsibility. Tasks can also have time estimates and they can be sequenced by identifying a predecessor task.
Tasks are simple, effective tools to ensure that work is done to complete a ticket without the ticket having to be reassigned many times between queues. For example, if three things have to be done to complete a ticket, each of those three things could be created as a task on the ticket.

### 5.6.1 Creating tasks

To add a singular task, open the ticket, click the "Add" button, and then select "Task".

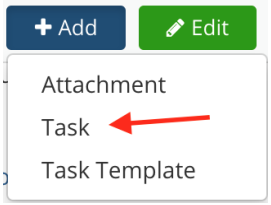

Figure 8. Adding an ad hoc task.

You will be asked to fill out a task title, description, information about when the task should start and end, and who the responsible party should be for this task. You can also identify a predecessor task, if this task should not begin until another task has completed.
If the appropriate task template exists, you add that task template to the ticket. However, only people with access to the Admin application can create task templates. If you find yourself adding the same set of ad-hoc tasks to many tickets, ask your TeamDynamix administrator if they could create a task template. Task templates are very useful to ensure you are taking the same steps every time.

### 5.6.2 Task ownership and ticket responsibility

The overall ticket has a responsible party, additionally every task has a responsible party. TeamDynamix calculates a ticket "responsible" field that includes the ticket's responsible party plus all the active tasks' responsible parties. This means that a ticket will show up under "Assigned to Me" if you are listed as the ticket's responsible party *or* if you are listed as responsible for one of the ticket's tasks. Please remember that "Assigned to Me" only shows tickets assigned to you personally—it does not show tickets that are assigned to a group you are in.

## 5.7 Creating tickets

There are several ways to create a ticket: via TDClient, from scratch in TDNext, copying from an existing ticket, or using a ticket template in TDNext.

### 5.7.1 Creating a new ticket via TDNext

To create a new ticket via TDNext:

1. Log in to TDNext
2. Select the appropriate Ticketing application, i.e. "Tickets"
3. Determine the appropriate ticket classification for the ticket you want to create. (See section 5.1)
4. Click the "+ New" button and then the appropriate ticket classification. (See Figure 9)

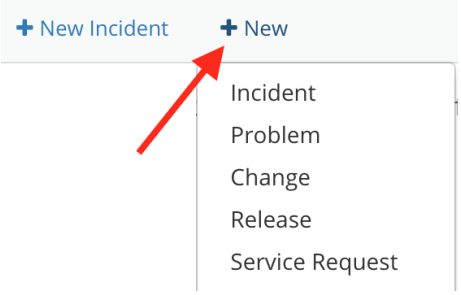


**Figure 9. Options for creating a ticket from TDNext.**

You will be taken to a form to create a ticket[9], where you will be prompted to fill out fields for this ticket. If you have any ticket templates for the ticket classification you will be able to select a template to use to help you fill out the ticket. (See section 5.7.4)

### 5.7.2 Creating a new ticket via TDClient

If your organization has created any service catalog entries for tickets, you can use those to create tickets on behalf of users. This ensures that you fill out all relevant request fields in the same way as client would.
The key field that must be made available on the service catalog entry is the "Requestor" field. If that field has been made visible on the service catalog request form, you can change the requestor to the appropriate user. This makes it easier to ensure the request is created appropriately.


**Figure 10. The requestor field as displayed on a service catalog request form.**

### 5.7.3 Copying from an existing ticket

You can easily create a ticket from an existing ticket. To do so, open the ticket and go to the "Actions" menu to "Copy <<ticket>>" e.g. "Copy Incident." You can then update any relevant fields and click "Save" to create the new ticket.
If you notice you are copying a ticket more than once, you may want to create a ticket template instead.

### 5.7.4 Ticket templates

Ticket templates help you fill out tickets via TDNext. You can create and share templates and you can have many templates.
To create a template, click "+ New" then "New Ticket Template." Fill out all fields you would like populated when you apply the template.
When you create a ticket, you will then be presented with a "Template" option and a list of all available tickets for that ticket classification. See Figure 11.

[9] This form is called an internal form. It can be customized by administrators, for example to change the order of fields or to hide fields. Administrators do this in the "Admin" application, in the "Internal Forms" section of the ticketing application.

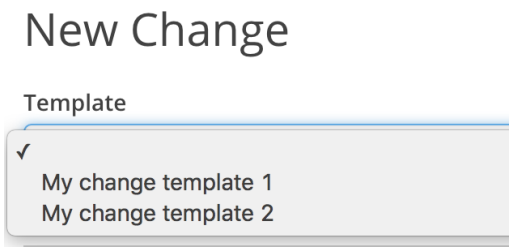


**Figure 11. The "Template" field lets you select from a ticket template for that ticket classification (e.g. for a change, you see all change templates).**

## 5.8 Ticket workflows

Ticket tasks (as described in section 5.6) are a powerful way to define work that must be done on a ticket, and to sequence that work. However, ticket tasks are linear and do not include a formal approval mechanism.

Ticket workflows are more powerful: they can track approvals, create tasks, trigger web service requests, and branch based on approval decisions.

Ticket workflows typically happen before people start working on a ticket. Administrators must create ticket workflows.

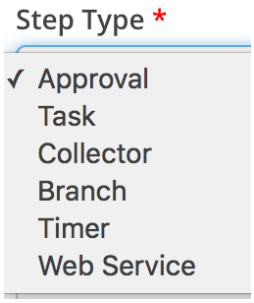


**Figure 12. Workflow step types as seen by a TeamDynamix administrator.**

## 5.9 What users see

As a ticket progresses, the requestor (and ticket creator, if different) can see the ticket via TDClient if they have access to the "Services" and "Ticket Requests" applications[10]:

1. Log in to TDClient
2. Go to "Services"
3. Go to "Ticket Requests"

They can see a summary of the ticket, plus they can click on the ticket to get more information. They can see feed updates, the person who last modified the ticket, and who has read the ticket. They can also withdraw the request or add comments.

**Please note that the client can see all feed updates unless the updates have been marked private.**

[10] Additionally, there is a security role options to let people see all tickets in their departments.

# 6 Service catalog

The service catalog is a TDClient application that lets users request service. People with a technician license can be granted permission to manage the service catalog, or portions of the service catalog. To see whether you have this access:

1. Log in to TDClient
2. Go to the "Services" application
3. See whether you have the "New Service" or "New Category" options.

It is also possible for you to be listed as the manager for a particular service. If you are listed as manager, you can edit the service.

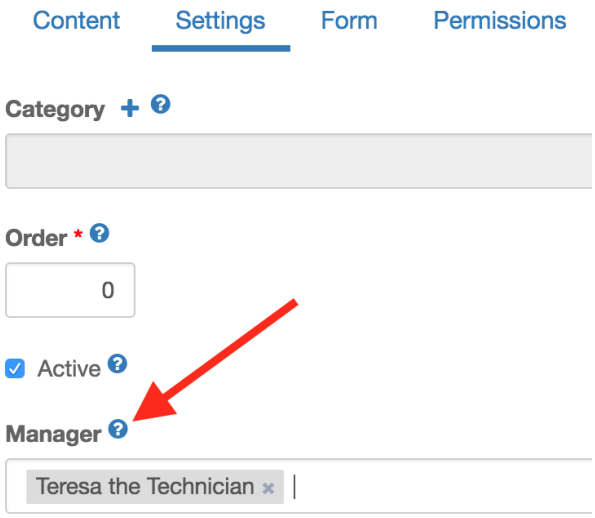


**Figure 13. The Manager field on a service, accessible to people who can edit the service via TDNext, under the "Settings" section.**

## 6.1 Creating service catalog entries

Service catalog entries can be organized into categories and sub-categories. This allows you to organize a large number of service catalog entries into manageable groups. When creating a service, you will be asked for the following information:

| | |
|---|---|
| **Category** | Where to place this service? (Can be blank, meaning the top level of the service catalog.) |
| **Name** | The service's name as displayed throughout TeamDynamix. |
| **Short Description** | The description seen when people are browsing the service catalog and see this entry. |
| **Long Description** | The description seen when people click on the entry. The long description will be the only description on the service itself, so please include all information you included in the short description. |
| **Order** | Services are sorted by the order value when they are displayed. |

| | |
|---|---|
| **Active** | Active/usable or not. |
| **Manager** | The person who should have permission to update/edit this service entry. |
| **Request Application** | Whether this entry is for a ticket, a project, or a (web) link. |
| **Type** | What type of ticket or project this service will create. (Note: for links, this will instead be the URL to use.) |
| **Request Service Text** | What to display on the button that users will click on to order this service, e.g. "Request Change" or "Order Now." This defaults to "Request Service." |
| **Notify Requestor on Ticket Creation** *(For Request Application "Tickets" only)* | Let the person listed in the requestor field know when the ticket is created? |
| **Notify Responsible Resource** *(For Request Application "Tickets" only)* | Let the person/group who are initially assigned to this ticket be notified? |
| **Workflow** *(For Request Application "Tickets" only)* | Ticket workflow to be assigned on ticket creation for this type of ticket. |
| **Tags** | Arbitrary tag words to assist in finding this entry when clients use the search functionality. Tags may only be single words with no punctuation. |
| **Maintenance schedule** | Maintenance schedule to associate with this service. Maintenance schedules define the times when this service can be taken down for maintenance. |

## 6.2 Editing service catalog entries

After a service catalog entry has been created, if you have access you can click on the service and then click the "Edit Service" button. You will then see seven sections:

| | |
|---|---|
| **Content** | Name, long description, short description |
| **Settings** | The other settings as described in creating a service. (See section 6.1) |
| **Form** | You can customize the request form that users see when they request the service. (See section 6.3) |
| **Permissions** | You can limit who has access to see this service:<br>• Whoever has access to the service category this service is in ("Inherit Permissions")<br>• Everyone ("Public") |

| | |
|---|---|
| | • Only certain TeamDynamix groups ("Allow ONLY the associated groups below to use this service").<br>• All but certain TeamDynamix groups ("Allow all individuals to use this service EXCEPT the associated groups below"). |
| **Relationships** | This allows you to relate this service to other configuration items. You would only do this if your organization is building a configuration management database. |
| **Related Articles** | Knowledge Base articles to display to the user before they request this service. |
| **Files** | Files for the user to be able to download before they request this service. Files can be uploaded, or added from any briefcase integrations your organization has configured (such as Google Drive). |

## 6.3 Building custom request forms

TeamDynamix will generate a standard request form for a ticket or a project. However, you can define your own request forms within TDClient. To do this, edit the service and go to the "Form" section.
If a form is already associated, you can click on "Settings" -> "Remove form."

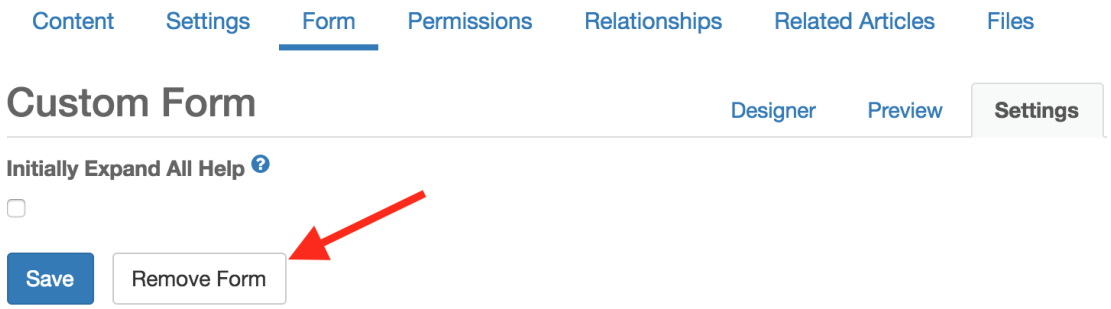


Figure 14. Removing an existing form.

When creating a new form, the "Designer" will let you drag fields into the form. You can then save your form with the "Save" button and review your form by clicking the "Preview" tab.
For each field, you can

- Set a default value, by typing or selecting a value
- Set it "Editable" if it's OK for users to modify the field
- Set it "Visible" if users should see the field
- Set it "Required" if the field must be filled out by the user

"Add New Field" will let you create a new custom attribute that's associated with the ticket type or project type.

Note that a few fields come with requestor-specific values:

- The Requestor field will be set to the authenticated user
- The Acct/Dept field will be set to the default Acct/Dept specified
- in the authenticated users profile. This field will update if the requestor field is changed.
- Asset/CI will show the user their own assets by default (rather than all assets)

## 6.4 Tips for creating a new Service

When creating a Service via TDClient, think about the following:

- Does a new ticket type need to be created? If so, contact your administrator.
- Should this service only be visible to a certain group? If so, if the group does not exist in TeamDynamix, contact your administrator.
- If you are creating a custom request form, that custom request form overrides settings in other place. Try to include:
    - **Responsible Group** or **Primary Responsibility**: set the appropriate value and probably make this a non-visible field
    - **SLA**: set to whatever Service Level Agreement you want to use
    - **Requestor**: If you keep this field visible, then people can request service on behalf of others. For example, IT staff can place requests on behalf of end users.
    - More generally, you may want to keep a list of fields that should be filled out for your organization on every custom request form.
- It is possible to point user requests to a URL rather than a request form using the "Link" service request type. (See section 6.1)

## 6.5 Using the service catalog

Once service catalog entries have been created, users with access to the "Services" application can request services that are visible to them:

1. Log in to TDClient
2. Select "Services" in the navigation bar at the top
3. By default, you are taken to the service catalog.

You can also find services by selecting "Services A-Z" or by searching:

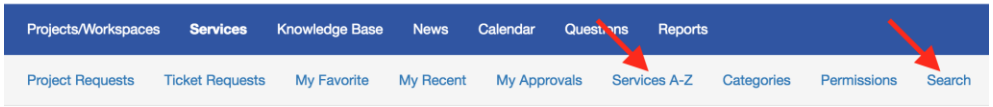


**Figure 15. The "Services A-Z" and "Search" options, under "Services" in TDClient.**

When you select a service, you will be see the service's description, plus any files or Knowledge Base articles associated with the service. You can then request the service, which will take you to a request form. (For links, you will instead be taken to the destination link.)
Please note: the URLs to TeamDynamix categories and services are permalinks[11]. You can copy a service's URL and send it to a user; they will then be able to see the same service page.

# 7 Assets/CIs

The Assets/CIs can be used for both asset management and configuration management. (See section 7.1)
Technician licenses can be given access to do almost anything within the Assets/CIs application. However, your security role may not give you access to all the functionality described here. See your TeamDynamix administrator if you would like access to functionality described here.

## 7.1 Asset management vs. configuration management

Asset management is the process for tracking what assets an organization controls. Asset management is closely connected to fixed asset management, a financial process used to understand the depreciated value of purchased assets. Asset management's core focus is to understand what assets exist and to ensure they are managed well. Typically, asset management is most focused on asset intake, asset changes, and asset disposal.
Configuration management is an ITIL process that focuses on how "configuration items" are related to one another. A configuration item is anything that might impact an IT service. Configuration management is focused on defining the scope of configuration management, collecting configuration items and building a map of how those items are related, and then updating this information whenever any configuration item changes. Configuration management is also interested in "status accounting," or understanding the current status of configuration items, and in verifying that the configuration management data is accurate.
Configuration management is virtually impossible without effective change management: you must understand what's changing to keep configuration data accurate.

## 7.2 Starting to track assets in TeamDynamix

To track assets in TeamDynamix, several types of records must be created:

1. **Vendors**, which can be tagged as suppliers, manufacturers, and/or contract providers.
2. **Product Types**, which classify product models into types such as "Laptop."

[11] That is, the links will persist and take users to the same screen that you see, assuming they have access as described in section 3.3.

3. **Product Models**, such as “MacBook Pro” or “MacBook Pro (Retina, 15-inch, early 2013)” depending on how much granularity you want to track. Product Models are dependent on Vendor and Product Type records.
4. **Assets** themselves, which depend on product models and vendors.

There are other data that can be collected, but these four types of records are required to create an Asset.

### 7.2.1 Manually creating asset records

You can create these records manually, using the “+ New” options the Asset/CIs application. (See Figure 16)

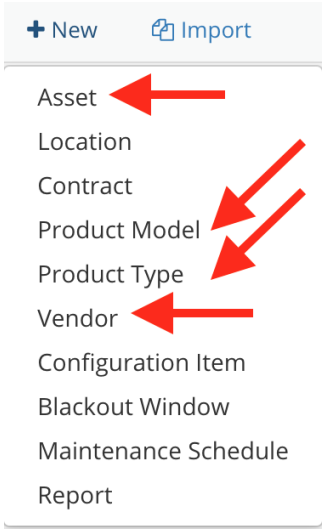


**Figure 16. Creating a new asset, product model, product type, or vendor under the "Assets/CIs" application.**

### 7.2.2 Importing asset records

You can also import asset records. To do this, you will use the “Import” button. (See Figure 17)

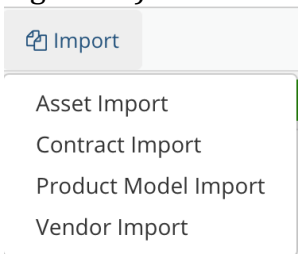


**Figure 17. "Import" options in the "Assets/CIs" application.**

If you’re first starting to populate Assets, populate Assets/CIs records in this order:

1. Import Vendors
2. Manually create Product Types, e.g. “Laptop”
3. Import Product Models
4. Import Assets

The order is important because these records are dependent on one another: Product Models need a Manufacturer (a Vendor record), for example.


**Figure 18. "Example import template" link, when you click an import option.**

When you begin an import, you can download an Excel import template file. (See Figure 18) This template will be pre-populated with valid column options; the asset import "Supplier" field will be pre-populated with valid suppliers, for example. Therefore, you want to populate data in order so that your import templates have valid values.
When you import, the import will validate data and alert you to any errors. Data will not be imported until the entire import is validated.
For assets, TeamDynamix does basic matching on your import. If the "External ID" or the "Asset Tag" value already exists, TeamDynamix will update the existing record on import rather than creating a new record.
For making bulk changes it is therefore possible to download asset data, change columns in Excel, and then re-import that changed data.

## 7.3 Asset data

An asset can have many fields:

| | |
|---|---|
| Serial Number | Unique asset identifier. |
| Supplier | Link to a vendor record. (This allows you to pull all assets associated with a given supplier.) |
| Product Model | Link to a product model. (This allows you to pull all assets of a given model.) |
| Status | Asset statuses can be configured by your TeamDynamix administrator. The default values are<br>• **Inventory**: this asset is available for use but is not being used<br>• **In Use**: this asset is deployed<br>• **Retired**: no longer in use but still physically owned<br>• **Disposed**: no longer in use and no longer owned |
| Purchase Cost | How much this asset cost, when it was purchased. |
| Location | Link to a defined location record. (See section 7.4) |
| Maintenance Schedule | The maintenance schedule defines the time period(s) during which maintenance activities can be scheduled for the asset. If this is not specified, there will be no |

| | |
|---|---|
| | restrictions placed on when maintenance can be performed on the asset. |
| Owning Acct/Dept | Link to a Acct/Dept record indicating the department that owns this asset. |
| Owner | Link to a TeamDynamix user record indicating the person who owns this asset. |
| Parent Asset | Link to another TeamDynamix asset. Used if this asset is part of a bigger asset (e.g. a Blade inside a larger Blade Chassis). |
| Requestor | Who asked for this asset. |
| Acquisition Date | The date this asset was purchased/acquired. |
| Expected Replacement Date | The date this asset should be replaced. |
| External ID | If you are using another asset management tool, you can use this field to track that tool's ID for this asset. |
| Attachments | Any files related to this asset, e.g. a signed asset form. |
| *Custom attributes* | Your TeamDynamix administrator can define other custom attributes for your environment. |

## 7.4 Locations

You can choose to define locations in TeamDynamix. Locations can then be used in tickets and assets. A location record can have a list of rooms, so typically organizations will create a location for each building. For example:

- Location: Harrelson Hall
  - Room: H103
  - Room: H104
  - Room: H302
  - Room: H303
- Location: Building #2
  - Room: 101
  - Room: 102
  - Room: 103

The location field can then be used in reports, for example to audit assets by location or to show all tickets tagged with a certain location. (See section 9.1)

## 7.5 Relating tickets to assets

If the "asset/CI" field is shown on a ticket request form, then when users use that field TeamDynamix will by default show them assets where they are listed as "owner." (See section 6.3)
Also, at any time an asset or CI can be added to a ticket:

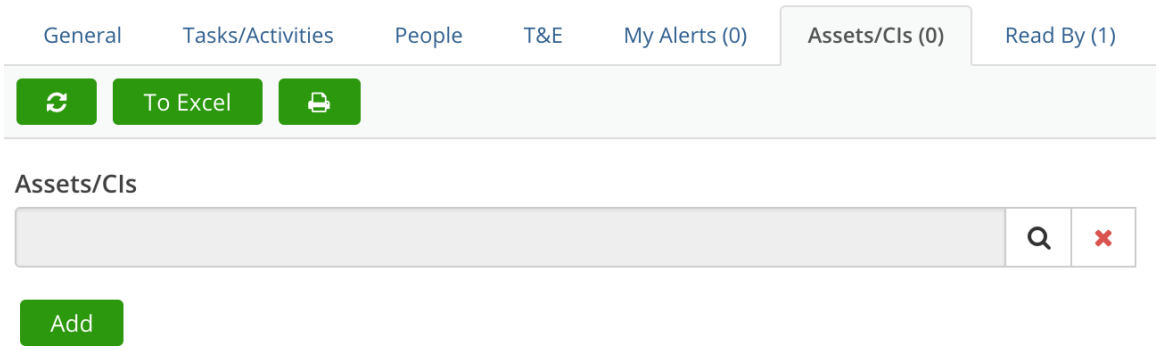


Figure 19. "Assets/CIs" tab on a ticket.

By default when you click the search button, you will see assets and CIs related to the requestor of the ticket.
Once you've related an asset or CI to the ticket, the asset will display in this "Assets/CIs" tab. Also, if someone clicks on the asset or CI, they will see this ticket listed. This allows you to run reports showing how many tickets there have been for a given asset.

## 7.6 Contracts

TeamDynamix can manage vendor contracts. Contracts are dependent on Vendor records being created and having the "Contract Provider" option. To verify that a vendor is a contract provider:

1. Open the Assets/CIs application
2. Go to "Vendors"
3. Select the vendor
4. See whether "Contract Provider" is displayed.
5. If not, edit the vendor and select "Contract Provider"

For example, "Apple" may be listed as a contract provider if you purchase a contract such as AppleCare from Apple.

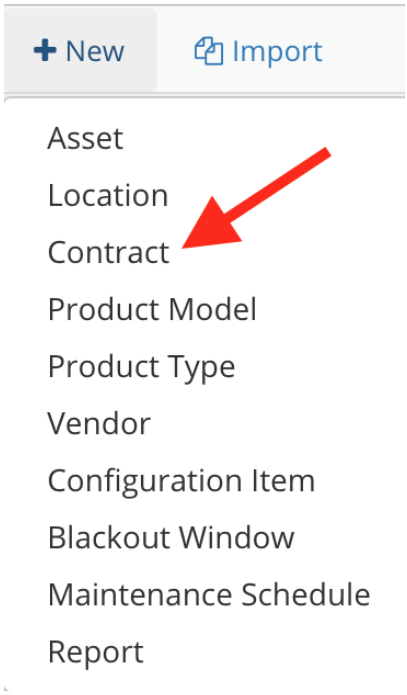


**Figure 20. Creating a new contract.**

To create a contract, click "+ New" then "Contract." Here are the Contract fields:

| | |
|---|---|
| Contract Number | ID number to reference the contract |
| Provider | Link to a vendor record with the "Contract Provider" option. |
| Contract Type | The four types of contracts are<br>• Warranty<br>• Service Contract<br>• Support Contract<br>• Upgrade Protection |
| Date Model | Either **Fixed** or **Sliding**.<br>If the date model is "sliding", the start date and the end date are customized on a per-asset basis. When an asset is added to a sliding contract, the start date will be based on the asset's acquisition date and the specified default duration will be added to determine the end date. If the asset does not have an acquisition date set, the creation date of the asset will be used as the start instead. The start and end date can be changed from these default values afterwards. For sliding contracts, the start and end date reported on the contract will aggregate across all of the assets it is currently associated with. |

| | |
|---|---|
| Acct/Dept | Link to an Acct/Dept record. |
| Description | Text description of this contract. |
| Active | Is this contract active? |
| Attachment(s) | Attaching files to the contract. |
| *Custom attributes* | Your TeamDynamix administrator can create custom contract attributes. |

Once the contract has been created, you can add assets by going to the Contract's "Assets" tab. Alternatively, you can go to an asset to the "Contracts" tab to add the contract.

### 7.7 Configuration items in TeamDynamix

By default, there are two types of TeamDynamix Configuration Items:

- Services (as defined in the Service Catalog; see section 6)
- Assets

TeamDynamix administrators can create other configuration item types, such as "Network Interface" or "Policy". Administrators can also create custom attributes for these configuration item types. After CI types and CI attributes have been created, you can create configuration items through the "New" -> "Configuration Item" option under "Assets/CIs."
Notably, configuration items can be related to one another. TeamDynamix administrators can create relationship types, such as "depends"/"is depended on by" or "powers"/"is powered by". These relationship types can be used to create complex configuration maps showing how components relate to one another.

## 8 My Work, Workspaces, and tracking time

The "Projects/Workspaces" application lets you look at work project-by-project. However, many times you are doing work on several different projects at once. "My Work" provides a centralized view of all your tasks and issues across projects.
Also, in a typical organization, project work is only a portion of your time. Some organizations want to track other work that is not captured within a project. The scheduled and actual time for this can be managed in Workspaces.
Some organizations track people's time for status reports or other purposes. TeamDynamix has a "Time & Expenses" application to track effort on projects and workspaces.

### 8.1 My Work

"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.

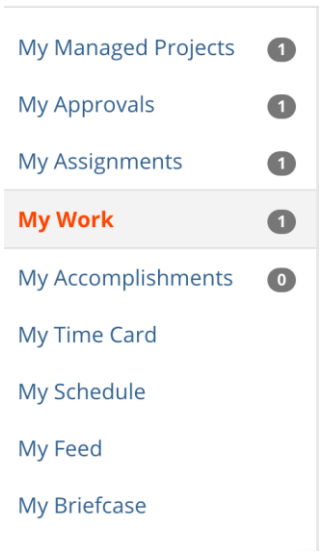


**Figure 21. Sections in "My Work." Note that the numbers by each section, which show how many records there are in each section, may not change until you hit the "Refresh" button.**

To access “My Work,”

1. Log in to TDNext
2. Select the "My Work" application from the Application Menu

“My Work” has several sections:

| | |
|---|---|
| My Managed Projects | If you are if you a project manager of an active project, you will see that project in this list. Clicking on the project lets you review the project’s sections and provide status updates. There are also quick links to other project components.<br>*Note: you can be listed as a project’s project manager with a Technician license.* |
| My Approvals | Approvals for, resource requests, time reports, project requests, and service requests. Dependent on the role played at the institution varying approvals will rely on you. |
| My Assignments | Whenever someone puts your name on a task or other unit of work in TeamDynamix, that work will show up in “My Assignments.” |
| My Work | Things only show up here if you have explicitly indicated that you are working on them by clicking “Add to My Work” from within the My Assignments section. You can also send work back to “My Assignments” if necessary. You have 100% control over what shows up within My Work |
| My Accomplishments | Tasks you have completed show up here. |

| | |
|---|---|
| My Time Card | This is another way to access your time card, rather than using the "Time & Expenses" application. (see section 0. |
| My Schedule | View the hours are you scheduled for on a project or workspace. For example, if there is a project beginning next month and you have been allocated 30 hours on that project, you would see that allocation in "My Schedule". |
| My Feed | This shows activity across all projects you a resource on. |
| My Briefcase | This shows all project and workspace briefcases that you can access. |

## 8.2 Workspaces

Workspaces, part of the "Projects/Workspaces" TeamDynamix application, can serve multiple purposes. A workspace is very similar to a project in that it has many of the components of a project, including the feed, resources, announcements, briefcase, and calendar. However a key difference is that workspaces do not have plans. The workspace can be used as a collaborative place for resource teams to discuss, share files, track work, etc.

A very common use of workspaces is for scheduling time and tracking actual time. It is understood that any user is not fully allocated to only project time. Therefore to honestly represent the user's availability a workspace is used to "hold time" for the recurring or administrative work not found within a project. For instance there are likely non-project related meetings and other responsibilities that demand your time. This time is what is scheduled to you on a workspace. You can be a member of multiple workspaces and create a new workspace, if you have the necessary permissions.

Once a workspace has been created and workspace members have been added, users with a Technician license can use a workspace few ways:

- To record time off
- To record non-project time, if your organization tracks time
- To track non-project files, using the briefcase
- To track non-project issues (although TeamDynamix "Tickets" application provides much more in-depth ticket tracking)

## 8.3 Tracking time

The "Time & Expenses" application will let you record project time, workspace time, issue time, and time off. It is strongly encouraged to use "My Work" and recording your time on tasks and issues as you work. When you update a task in "My Work" there is an option to add hours worked. Those hours will then be recorded on your timecard.

To access Time & Expenses:

1. Log in to TDNext
2. Select the "Time & Expenses" from the application menu

The time you record can go through an approval process, and the time can roll up to the project record to show total time spent on the project. Users can also have costs associated with their time (via the user record), and the project will then show the expenses for the time spent on the project. Users with the "Analysis" application can run a Scheduled v. Actuals report to learn how to improve estimates of resource scheduling.

### 8.3.1 Adding work time via Time & Expenses

When you select the application, you will be taken to the "Time Entry" screen. Here you can navigate week-by-week, see what time has been recorded, and add time. Please select the week you want to record time. You can then add time by clicking the "+" button under a listed project or workspace, or by clicking the "Add Time" button.
In the "Add Time Entry" dialog box you must select if this is Project/Workspace, Issue, or Time Off time. Once you have selected the proper entity to record the time on a time type (a descriptor of the kind of work accomplished) is required.

Depending on how your environment is configured, you may be able to record time for a project, or only for tasks on that project. Your environment may have several time types for different sorts of work, such as Meetings, Testing, or Administrative. Please review your organization's time-tracking process for what time types to use.
*Note: If a project or workspace does not have any time types, time cannot be recorded on it.*

### 8.3.2 Adding leave/time off

TeamDynamix administrators can denote organization-wide holidays[12]. However, your organization may also want to see in TeamDynamix your time off.
To record time off, your TeamDynamix administrator must have set up a place to record leave. They need to create one or more time types coded as a "Time Off Type[13]," a place to record time off (likely will be a workspace), and then associate the time types with the workspace/project for recording time off
Once all that has been set up, adding time off is relatively easy:

1. Log in to TDNext
2. Go to the "Time & Expenses" application
3. By default, you should be taken to the "Time Entry" section
4. Navigate to the week that you will be entering time off.
5. Click "Add Time"

[12] Under Admin > Days Off
[13] Admin > Accounts > Time accounts

6. Click “Time Off”
7. Select the workspace your administrator set up along with the appropriate time type
8. Record the number of hours you are taking that day. Please note: your administrator defines your daily capacity —if you are taking a full day of leave, please make sure you record however many hours your administrator has defined. (The default TeamDynamix daily capacity is 8 hours per day.)

### 8.3.3 Finalizing your timecard

If your organization tracks time, you will need to finalize your timecard at the end of each week. To do this, go to the Time & Expenses application, to Time Entry, to the week to finalize. Then click “Submit as Final.”
Depending on your organization’s processes, your time may then go to a review. You can still see the time via the “Time Entry” section for that week or under the “Submitted Time” section. Once time has been submitted as final you are unable to modify the time, unless the reviewer rejects the time entry.

# 9 Reporting and Desktops

TeamDynamix provides ad-hoc reporting, and ways to pull together different reports and information into “Desktops.”

## 9.1 Creating Reports

Many TDNext applications have a way to create reports. For Technicians, most likely you would create reports within the “Tickets” application. To create a report:

1. Log in to TDNext
2. Select the “Tickets” application
3. Click the “+ New” button and select “Report”

In Tickets, you can create reports for each of the following types of data:

| **Data type** | **Example** |
|---|---|
| Ticket Reports | Reports with one row per ticket. |
| Survey Response Reports | Reports with one row per ticket survey response. (Surveys can be sent out when a ticket is closed.) |
| Tasks Reports | Reports with one row per ticket task. |

Once you select the data type, you will be taken to the report editing screen, which has several sections:

- Name
- Description
- Report columns
- Filtering
- Ordering

- Maximum rows
- Visibility
- Chart
- "Desktop delivery" (how this report is seen when pulled into a Desktop)
- Email delivery

### 9.1.1 Name

The name that will show up in lists of reports. Please note: if you make this report visible to others, the name will be the main way they know what the report is.

### 9.1.2 Description

Describe your report including its purpose or assumptions.

### 9.1.3 Report columns

Select the columns to see in your report. You can add, remove, and rearrange columns.
The blue "Help" button will provide a description of each column and what it means. Notably, there are a few special types of columns:

- "Count" columns, e.g. "Issue Count." If you include a "Count" column, TeamDynamix will look at the other columns you have selected and return unique values along with a count. For example if you select only two columns, "Project Type" and "Project Count," you will see each type of project type in use along with how many projects use that type.
- Columns you can "Aggregate", where a drop-down shows up in the "Aggregate" column. These let you summarize data, for example to show the maximum or minimum values.
- Date-based columns, e.g. "Project Created." You can change the "Display Format" roll these up to different levels of detail, such as only the year or the year and month.

### 9.1.4 Filtering

Choose what data to include in your report.
By default, all filters behave in an AND relationship, i.e. results are only rows that match all filters. Select the column, the operator (e.g. "is one of" or "is not one of"), and the value.
If you select the "Prompt" checkbox, then anyone running the report will be prompted for what values to filter on. Selecting the "Prompt" checkbox will display the "Required" checkbox, so you can specify whether the field must be filled out. If you want the field to be required you must also specify a default by choosing a value from the "Value(s)" column.
*Note: you almost always want to add a filter for Project Status is "Active."*
If you want to do more advanced filtering:

1. Add all the filters you want to use
2. Click "Show Advanced"

3. Note the filter number for each filter you created, e.g. “1”, “2”, “3”
4. Type in your combined filter in the box using the numbers, OR, AND, and parentheses. For example, “1 OR (2 AND 3)” would return results where filter 1 is true or where both filter 2 and 3 are true.

### 9.1.5 Ordering

This section lets you choose the order that rows will be displayed. Records will be showed in order by the first value, and then when records are tied the second value will be used. For example, if you order by status and then by modified date, you will see all records sorted by their status and then within each status you will see them ordered by modified date.

### 9.1.6 Maximum rows

By default, TeamDynamix will limit the maximum number of records returned on a report. If you want more or fewer rows returned, change the number.
*Note: Increasing this value may make your report take longer to run*.

### 9.1.7 Visibility

By default, reports are visible only to you. However, you can make your report visible to other groups by selecting the “Me and people in this groups” option. If a group of users that you need does not exist, speak with your TeamDynamix administrator to have it created.

### 9.1.8 Chart

Here’s where you can add a visualization, such as a bar chart or a pie chart. Understanding the special columns such as “Project Count” will help greatly. Typically you will want to see aggregate data in a chart, such as the number of projects by project manager. In this case, your chart would show “Project Manager” as the “Name” and “Project Count” as the value.

### 9.1.9 Desktop delivery

Desktop delivery means how this report is seen when pulled into a desktop. Desktops can show information across several applications and reports. Here you can choose how this report is viewed in a Desktop application. You can choose between a chart view (if you added one) or the grid view of your report.

### 9.1.10 Email delivery

Email delivery for TeamDynamix reports is very powerful. You can define daily, weekly, or monthly reports be emailed. Further, you can choose the format (e.g. Excel, PDF, etc..) and who should receive the report. Any TeamDynamix user, including Client licensed users, can receive reports via email delivery. Only TeamDynamix users can receive reports via email delivery.

## 9.2 Running reports

Once a report has been created, you can find it in the application where it was created under the “Reports” section in the left navigation. You will only see reports that you have create or have been shared with you (see section 0).

After you select the report, you have several options:

- **Run**: The run button will run the report. If there are report prompts, you can change their values and click "Run" to see the updated report.
- **Actions**
  - **Export to Excel**
  - **Show Details**: If you are the report owner, you can delete the report here. You can also change the report owner.
  - **Print**: An HTML, printable version of the report.
  - **Copy**: Create a new report from this report. Useful when you do not own the report you're viewing and you want your own version so you can modify the report.
- **Change page size**: TeamDynamix will paginate your report by whatever the value is here, e.g. if you say page size "30" then you will see 30 results plus a "next" button to see the next set of results in the report.

## 9.3 Desktops

There are two types of desktops within TDNext:

1. Desktops defined in the Desktops application,
2. 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.

### 9.3.1 Creating or editing a desktop

To create a desktop, either

- Go to your Desktop application (TDNext > Desktop) and click "New Desktop", or
- Go to the specific TDNext application such as Projects/Workspaces application, select "Desktop", and then click "Edit Projects/Workspaces Desktop." You can only have one application-specific desktop per application.

In the Desktop application, if you want to edit an existing desktop, click the gear in the top right corner to go to "Manage Desktops," and choose the desktop you want to edit.

### 9.3.2 Changing desktop content

Once you have opened the desktop to edit it, you will see two tabs, "Details" and "Content."
Under the "Content" tab, note the "Edit Layout" button. Here you can change how many columns to see in your desktop, and where the columns should be.

In the “Content” tab you can also add “Available content” into columns. Available content includes built-in content, such as a chart of your project issues, as well as reports that have been made visible to the desktop module.

### 9.3.3 Switching between desktops

In the “Desktop” application you can create many desktops. You can switch desktops by choosing the desktop name in the drop-down box.
To change your default desktop:

1. Click the gear to go to “Manage Desktops”,
2. Click the name of the desktop that you want to make default,
3. Go to the “Details” tab
4. Click the “Set as default” button.

# 10 Other applications

## 10.1 Questions

Your administrator may have given you access to the TDClient Questions application. Questions is designed for TeamDynamix users to help other TeamDynamix users. If you have access to Questions, you can ask or answer questions. For example, if on a project you do not know how to get a contractor access to your environment, you could post a question. Anyone else using Questions could then answer that question. Questions are very much like an open forum and are intended to be ways for people to help one another learn.