

# TeamDynamix Service Development Guide

This document serves as a guide to help you help us, TeamDynamix Administrators, with developing your new service(s) and request form(s), as well as additional configurable items.

## A. SERVICE INFORMATION

### **Ticket Type Name**

Ticket Type is a way of categorizing your ticket data and is associated with your Service and Request Form. It usually has the same name as your Service, but it can be different if desired.

### **Service Name**

A Service is the item being requested by the client. It is the name displayed in the Service Catalog to users.

### **Service Audience**

- Clients (*Published in the Service Catalog*)
  - All ECU authenticated users
  - Guests (non-ECU users)
  - Specific TeamDynamix Groups (i.e., ITCS, Direct Reports, Distributed IT)
- Technicians Only (*Not published in the Service Catalog*)

### **Service Description**

If a service is published in the Service Catalog, you will be required to provide a short and long service description of the service.

- Short – Should be 1 to 3 lines.
- Long – A more detailed description and can include images and URL links. Your long description will follow the standardized service template and include the following sections:

#### *\*Required*

- **Support\*** – how to request support for your service
- **Overview\*** – a short & sweet explanation of your service
- **Available To\*** – your audience (Faculty, Staff, Students)
- **Get Started** – this could be a short set of instructions or whatever is needed to get started using your service
- **Features and Benefits** – list of or fuller explanation of the features and benefits of using your service
- **Related Policies and Guidelines** – Do any ECU PRR's pertain to this service? Any policies, state guidelines, etc.?
- **Service Availability** – During business hours when can users expect to be able to access your service?
- **Service Level Expectations** – What level of support can a user expect? How long will take a user to receive support?
- **Learn More** – any additional information that is not a knowledge base article or uploaded document

- **Integrated Services** – Are there other services that work with service?
- **Accessibility** – Are there any specific accessibility tools or resources associated with this service?
- **Also Known As** – Would users know this service by another name?
- **Fees\*** – Are there any fees associated with this service?

## B. REQUEST FORM

### Standard Attributes

Below are the standard attributes on every form. The label for each can be customized per form. (i.e., 'Description' can be renamed to 'Description Details')

- |  |   |
|--|---|
| • Requestor or Submitting on Behalf Of | • Status ( <i>hidden from client</i> )      |
| • Acct/Dept                            | • Project ID# ( <i>hidden from client</i> ) |
| • Brief Title                          | • Service ( <i>hidden from client</i> )     |
| • Description                          | • Type ( <i>hidden from client</i> )        |
| • Preferred Contact Method             | • Source ( <i>hidden from client</i> )      |
| • Callback Number                      | • Responsible ( <i>hidden from client</i> ) |
| • Best Available Time                  |   |
| • Attachment                           |   |

The following are optional attributes you can select to be added to your form. They will be hidden from the client unless otherwise notified.

- |  |  |
|--|--|
| • Contact  | • Impact ( <i>Affects User, Department, Building or Organization</i> ) |
| • Priority ( <i>High, Medium, Low, Emergency</i> ) | • Urgency ( <i>Low, Medium, High</i> )                                 |

### Custom Attributes

When creating your attributes, think about what data you need to collect on each form, as well as what you would like to report on.

Attribute Types available are:

- |   |  |
|---|--|
| • Static Text/Label                     | • Radio Button horizontal (single selection) |
| • Check Box (multiple selection)        | • Radio Button vertical (single selection)   |
| • Color                                 | • Date Picker                                |
| • Dropdown (single selection)           | • Date/Time Picker                           |
| • Location (Building)                   | • Text Box (Text, Integer, or Decimal)       |
| • Location and Room                     | • Text Area                                  |
| • Multiselect List (multiple selection) |  |
| • Person                                |  |

## **Attribute Dependencies**

Attributes can have a “parent-child relationship”, which are called Attribute Dependencies. Unique questions and options can display based on a parent selection. They allow you to reduce the number of services/forms and interact with the automation rules.

*Example:*

Are you a faculty, staff or student?


If faculty selected, then display questions 1, 2 and 3.

If staff selected, then display questions 4, 5 and 6.

If student selected, then display questions 7, 8, and 9.

## **Protected Attributes**

Protected attributes are custom attributes which are protected from unauthorized viewing. If used, they are only visible to the technician if he/she has been given permission to view them. To ensure their security, they are very limited. Limited features: protected attributes are NOT reportable, cannot be used in the API, cannot be a driver for a cascading attribute, cannot be included in search filters and are excluded from notifications.

 Although protected attributes can be created and they help limit the risk associated with sensitive information, TeamDynamix prohibits sensitive data collection. If sensitive data is needed, a security review and authorization will be required.

Protected attribute options are as follows:

- Allow requestor to view data in client portal
- Require technician to enter a PIN to access the data
- # of characters to unmask - The number of characters that will automatically be unmasked to users without requiring them to enter a PIN. (ex. \*\*\*\*\*1234) -
- # of seconds to display values - The number of seconds an unmasked value can be viewed before it automatically becomes masked again.

## C. TASK TEMPLATE (*Optional*)

A Task Template is a manual workflow process. It is a series of pre-defined tasks which are consistently & commonly performed by the technician or team. The template can be associated with a ticket on ticket creation, added manually when needed or automatically assigned via an automation rule. The tasks can run concurrently or have predecessors, in which one task has to be completed before moving on to the next task.

**Benefits of a Task Template:** It saves time, improves operational efficiency and ensures consistency and clarity of tasks.

*Example:*

Order ↕	Title ↕	Description ↕	Est ↕	Complete Within ↕	Pred ↕	Responsible ↕
1	Clarify, as needed, with Creator/Requestor the specific access being requested		1.00 hr			Unassigned
2	Obtain Supervisor Approval --> send corresponding approval response template		0.00 hrs	1.00 hr	Clarify, as needed, with Creator/Requestor the specific access being requested	Unassigned
3	Obtain Ticket Type Owner Approval --> send corresponding approval response template		0.00 hrs	1.00 hr	Obtain Supervisor Approval --> send corresponding approval response template	Unassigned
4	Send to Jo Lynne for Review --> send corresponding review response template		0.00 hrs	1.00 hr	Obtain Ticket Type Owner Approval --> send corresponding approval response template	Unassigned
5	Grant/Change Access --> select Security Role, make an Employee, add to Ticketing Application, TDNext, My Work & Group(s)		0.00 hrs	1.00 hr	Send to Jo Lynne for Review --> send corresponding review response template	Unassigned
6	Close Ticket --> send corresponding Closing response template		0.00 hrs	1.00 hr	Grant/Change Access --> select Security Role, make an Employee, add to Ticketing Application, TDNext, My Work & Group(s)	Unassigned

## D. WORKFLOWS (*Optional*)

A workflow is an automated workflow process. A workflow can be created for EACH service request/ticket type.

Types of workflow steps:

- Approvals
- Tasks
- Branch
- Collector
- Timer
- Web Service (*Allows for more automation. Each web service step takes up to 5 minutes to process.*)
- Conditional Steps
- Choice Steps

## E. RESPONSE TEMPLATE (*Optional*)

A Response Template is a pre-defined response to be used when updating comments or communicating with the requestor, customer or technician.

*Example:*

Hello Brad,

I have taken primary responsibility for your request and will respond shortly.

Thank you for your request.

Andrea  
ITCS

## F. SERVICE LEVEL AGREEMENT (SLA) (*Optional*)

An SLA is the terms of contract between the service provider and the end user that defines the level of service expected from the service provider. It is based on business days from 8AM – 5PM with 1 hour accounted for lunch; therefore, 1 day = 9 hours.

An SLA can be created for EACH service request/ticket type.

Respond By = Communicate with the requestor and confirm the ticket has been received.

Resolved By = Process a ticket through to a Closed status within set time parameters.

*Example:*

<b>Respond By (hours/minutes):</b>	2 hrs
<b>After (%)</b>	<b>Notify</b>
50%	Responsible resource
75%	Responsible resource
100%	Responsible resource & Manager
<b>Resolved By (hours/minutes):</b>	45 hrs
<b>After (%)</b>	<b>Notify</b>
50%	Responsible resource
75%	Responsible resource
100%	Responsible resource & Manager

## G. OTHER INFORMATION

### **Automation Rules**

Automation rules allow you to specify actions that should take place when a ticket is created. You need to specify the Condition and the Automation Actions. Automation actions that can be applied are:

- Assign To
- Change Impact
- Change Urgency
- Change Priority
- Assign to an SLA
- Apply a Task Template
- Assign to a Workflow
- Notify People
- Notify Groups

### **Email Monitors**

Tickets can also be automatically created from an email. You will need to provide us the email address and specify which TeamDynamix request form it applies to. Limitations: None of the custom attributes from the form will be populated; thus, you will need to populate after it is received in TeamDynamix.

### **Statuses**

Statuses can be customized if for a new ticketing application.

The standard statuses used are:

- New
- Work in Progress
- On Hold
- Completed Pending Review
- Closed