

CUSTOMER SUPPORT TOOL

TeamDynamix "First Look"

Webinar format

- Presentation followed by question and answer.
- Use the **Q&A option** to submit a question.



- If we have time, we'll answer them at the end of the session.
- If we run out of time, we'll post the answers on the website.

We'll post the recording on: https://tarheels.live/customersupporttool/

Webinar Team

Presenters:

- Kate Hash, Assistant Vice Chancellor, ITS-Customer Experience & Engagement
- Calvin Groves, Director, Customer Support & Outreach, ITS-Customer Experience & Engagement

Moderator:

Jackie Treschl, Change Manager, ITS-Project Portfolio & Change Management

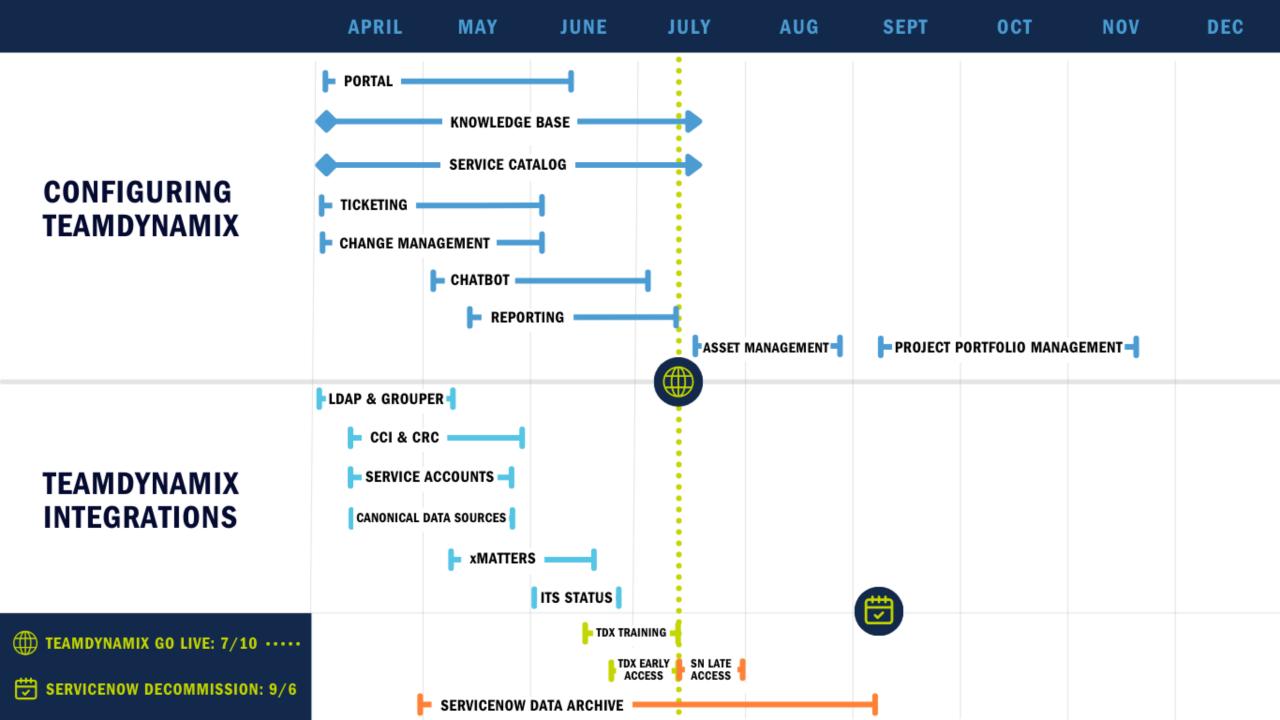
Today's Agenda

- 1 Introduction
- 2 Timeline & what go-live looks like
- 3 Terms you need to know
- 4 Preview of TDX
- **5** What's Next

Welcome to TeamDynamix

- Why TeamDynamix and why now?
- Number one guiding principle:
 - Do what creates the best possible customer experience.
- Priorities for go live are current ServiceNow functionality
- Clean slate philosophy





Terms You Should Know

TEAMDYNAMIX TERM	SERVICENOW TERM
Agent	Fulfiller
Responsible attribute	Assignment group
Responsible attribute	Assigned to
Known Issue	Problem
Service offering	Catalog item
Attributes	Variables

TDX SPECIFIC TERMS	DEFINITION
Portal (or Client Portal)	Customer front end
TDNext	Agent back end

Ticket Classifications

- Incident
- Service Request
- Major Incident
- Known Issue
- Change
- Release*

*No current plans for use

- Everything is flat, a ticket is a ticket
- No more REQ > RITM > SCTASK for Service Requests!
- Ticket tasks are still available when needed



TDX PREVIEW

Portal – Front End Customer View

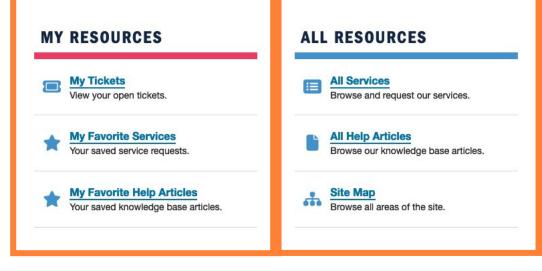
Portal: Home



Search the client portal UNC Customer

Services Knowledge Base





ITS SYSTEM STATUS

ITS System Status is provided by the ITS Operations Center.

> View system status and history.

Real-time system status coming soon.

Still need help? Get Help >

Portal: Footer



TIS SYSTEM STATUS ITS System Status is provided by the ITS Operations Center. > View system status and history. Real-time system status coming soon.



Portal: "Easy Button"



Submit



Home Services Knowledge Base Service Catalog / General Request + Show Help - Hide Help **General Request** If you have searched our services and are unable to find what you need, you can use this request for general inquiries. Requested for * @ 2 ₹ Q X **UNC Customer** Requested on behalf of * Myself O Someone Else Preferred contact method * O Phone O Email O MS Teams O Other Preferred contact details * Acct/Dept * @ * Q X Academic Affairs - 102000 What type of support would you like to request? * 3 O ITS Service Desk support O Departmental IT support Support from a specific group Select the specific group * Start typing... Group A Group B Group C Group D body Attachment @ No file chosen Browse...

Portal: "Easy Button"

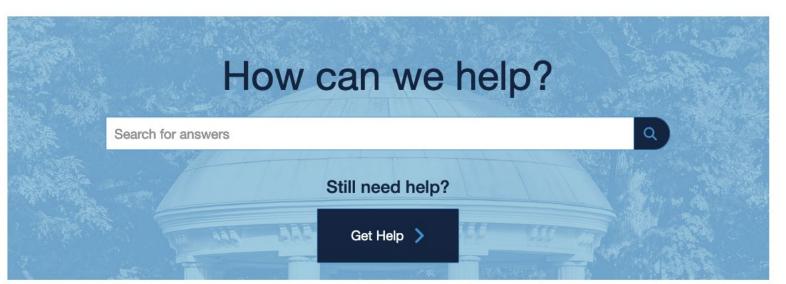




Home Services Knowledge Base Service Catalog / General Request + Show Help - Hide Help **General Request** If you have searched our services and are unable to find what you need, you can use this request for general inquiries. Requested for * @ 2 v Q x **UNC Customer** Requested on behalf of * Myself O Someone Else Preferred contact method * O Phone O Email O MS Teams O Other Preferred contact details * Acct/Dept * @ v Q X Academic Affairs - 102000 What type of support would you like to request? * 3 ITS Service Desk support O Departmental IT support O Support from a specific group How can we help? 3 Format - Font - Size - A- B I U S x x x Z Ix Attachment @ No file chosen Browse... Submit

Portal: Service Catalog





Search the client portal

UNC Customer



Portal: Service Catalog



Search the client portal

Services A-Z Search

My Recent Requests

Office, browser, printing, etc.)

SOM - Computer Support

Popular Services

VPN Access Request

Submit KB Article Review

Servers and Storage Service - TEST

My Recently Visited Services

Employee Onboarding / Offboarding

SOM - Computer Support

Test Service Internal Request

Test Service

Password Reset

SOM - Computer Support - Software issue (MS

View All Recent Requests >

View All Popular Services >

calvin test for ITEC

test ticket

Testing

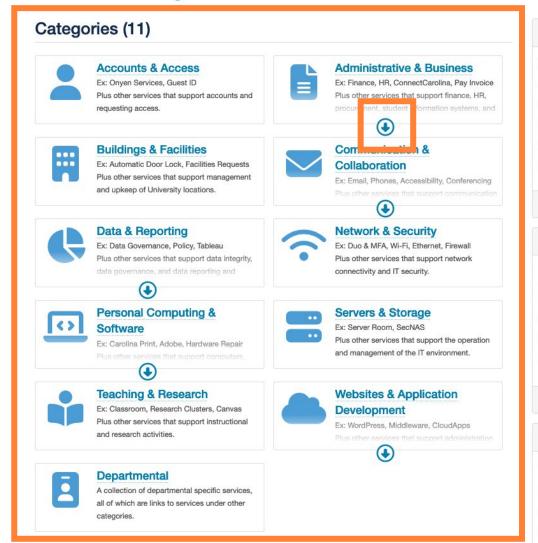
UNC Customer



Knowledge Base Services

Ticket Requests My Favorites My Recent My Approvals

Service Catalog





Search the client portal

UNC Customer



Services

Knowledge Base

Ticket Requests

My Favorites My Recent My Approvals

Services A-Z Search

Service Catalog

Categories (11)



Accounts & Access

Ex: Onyen Services, Guest ID Plus other services that support accounts and requesting access.



Administrative & Business

Ex: Finance, HR, ConnectCarolina, Pay Invoice Plus other services that support finance, HR, procurement, student information systems, and other administrative areas.





Buildings & Facilities

Ex: Automatic Door Lock, Facilities Requests Plus other services that support management and upkeep of University locations.



Communication & Collaboration

Ex: Email, Phones, Accessibility, Conferencing



connectivity and IT security.

Servers & Storage Ex: Server Room, SecNAS

Ex: Duo & MFA, Wi-Fi, Ethernet, Firewall

Plus other services that support network

Plus other services that support the operation

and management of the IT environment.



Data & Reporting

Ex: Data Governance, Policy, Tableau Plus other services that support data integrity,





Personal Computing &

Ex: Carolina Print, Adobe, Hardware Repair





Teaching & Research

Ex: Classroom, Research Clusters, Canvas Plus other services that support instructional and research activities.



Websites & Application Development

Ex: WordPress, Middleware, CloudApps



My Recent Requests test ticket calvin test for ITEC Testing SOM - Computer Support - Software issue (MS Office, browser, printing, etc.) SOM - Computer Support View All Recent Requests > **Popular Services Test Service** Internal Request VPN Access Request Submit KB Article Review Servers and Storage Service - TEST View All Popular Services > My Recently Visited Services **Test Service** Servers and Storage Service - TEST

Connect to a Printer



Departmental

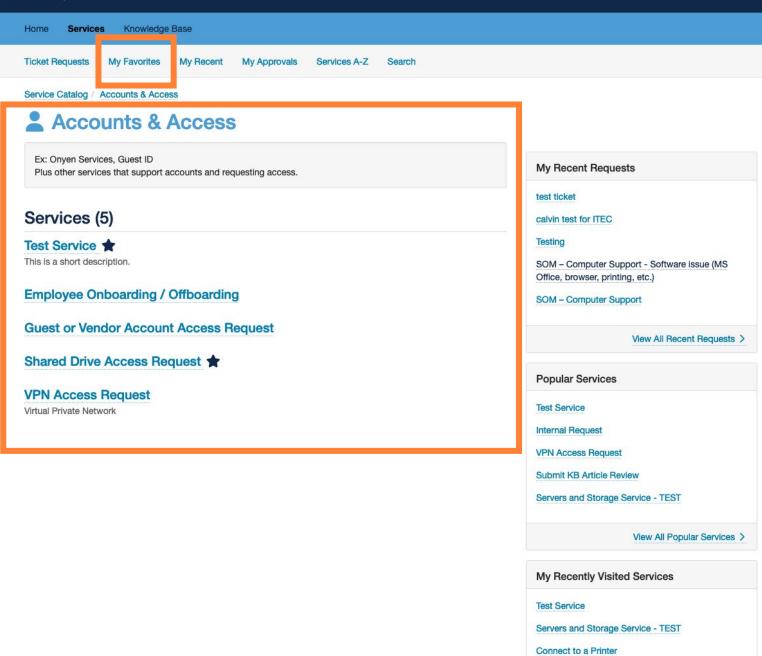
A collection of departmental specific services, all of which are links to services under other categories.

Portal: Service Catalog





UNC Customer



Portal: Service Catalog





UNC Customer

Services Knowledge Base

My Favorites My Recent My Approvals Services A-Z Search

My Favorite Services (7)

Connect to a Printer

Service Catalog / Personal Computing & Software

Favorited on Wed 5/8/24 4:17 PM

Data and Reporting Service - TEST

Service Catalog / Data & Reporting Favorited on Wed 5/8/24 4:17 PM

Report Phishing/Spam

Service Catalog / Network & Security Favorited on Wed 5/8/24 4:17 PM

Servers and Storage Service - TEST

Service Catalog / Servers & Storage Favorited on Wed 5/8/24 4:18 PM

Shared Drive Access Request

Service Catalog / Accounts & Access Favorited on Wed 5/8/24 4:16 PM

Test Service

Service Catalog / Accounts & Access

This is a short description.

Favorited on Wed 5/8/24 4:16 PM

Voice Services

Service Catalog / Communication & Collaboration

Favorited on Wed 5/8/24 4:17 PM

Remove

Remove

Remove

Remove

Remove

Remove

Remove

Portal: Service Catalog





Attachments (0)

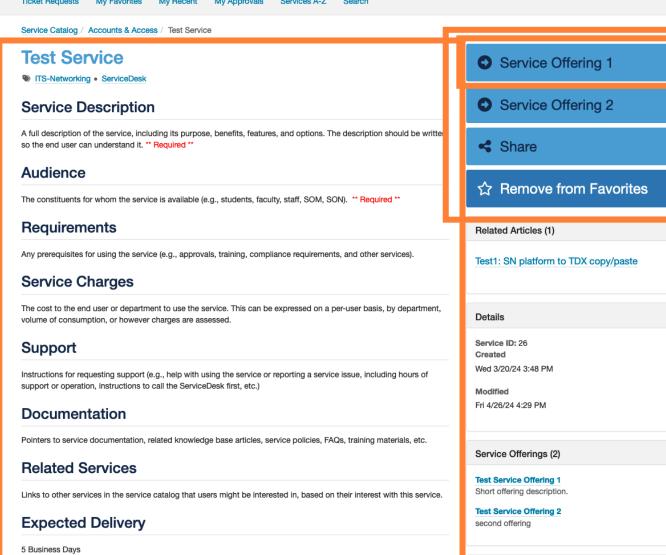
No files found.

UNC Customer

Services Knowledge Base

Keywords

My Favorites My Recent My Approvals Services A-Z Search



Portal: Service Catalog





Home Services Knowledge Base

Service Catalog / Accounts & Access / Test Service / Test Service Offering 1 + Show Help - Hide Help **Test Service Offering 1** Short offering description. Subject * @ Requested for * 3 * Q X **UNC Customer** Requested on behalf of * Myself O Someone Else Preferred contact method * O Phone O E-mail O MS Teams O Other Preferred contact details * Acct/Dept * 3 Y Q X Academic Affairs Request-specific content goes here! Additional Information 2 Format - Font - Size - A- B I U S x x x Z Ix Attachment Browse... No file chosen

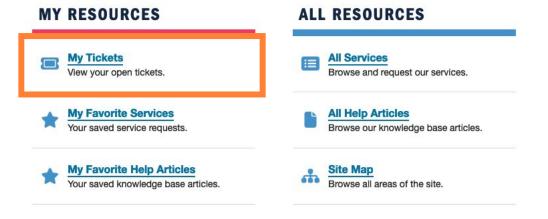
Submit

Portal: My Tickets



Services Knowledge Base





ITS SYSTEM STATUS

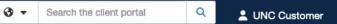
ITS System Status is provided by the ITS Operations Center.

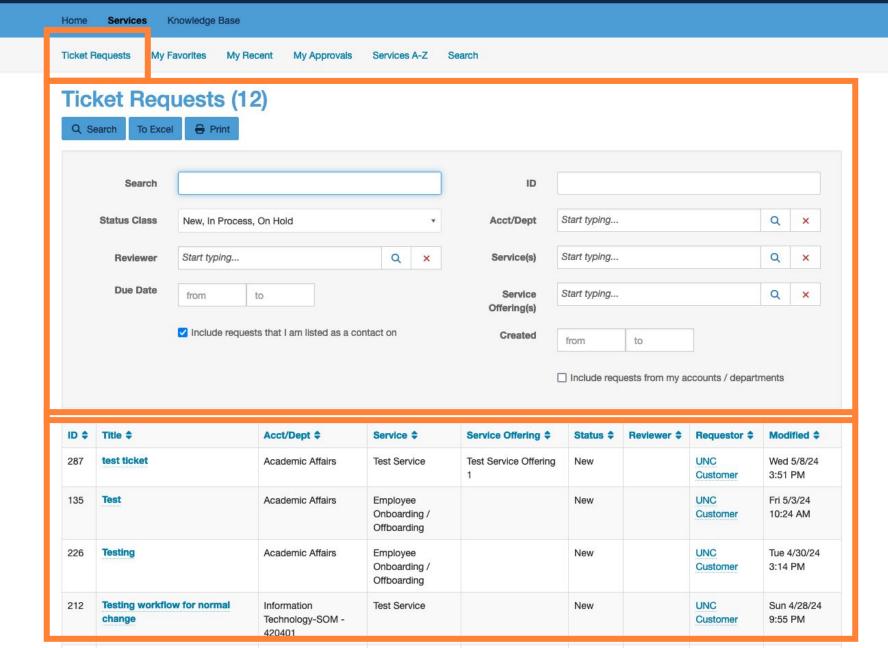
> View system status and history.

Real-time system status coming soon.

Portal: My Tickets

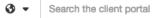




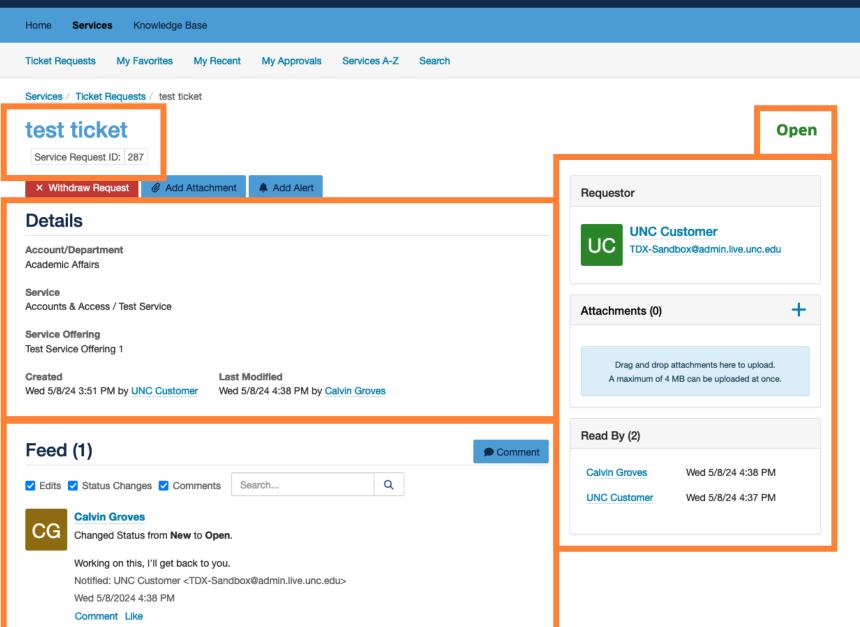


Portal: My Tickets

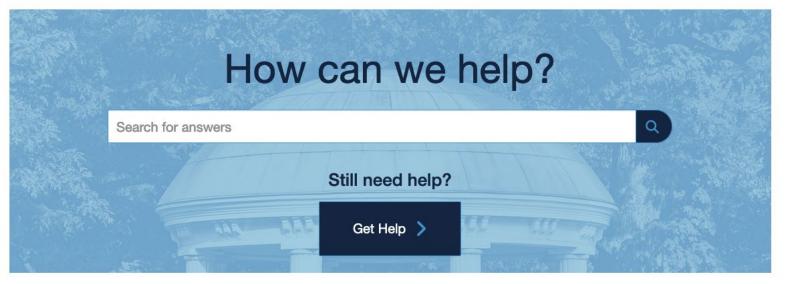




UNC Customer

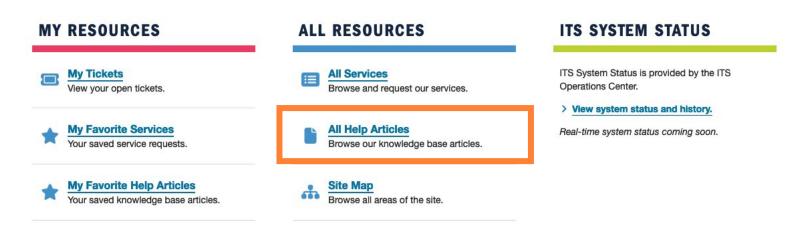






Search the client portal

UNC Customer







UNC Customer

Services

Knowledge Base

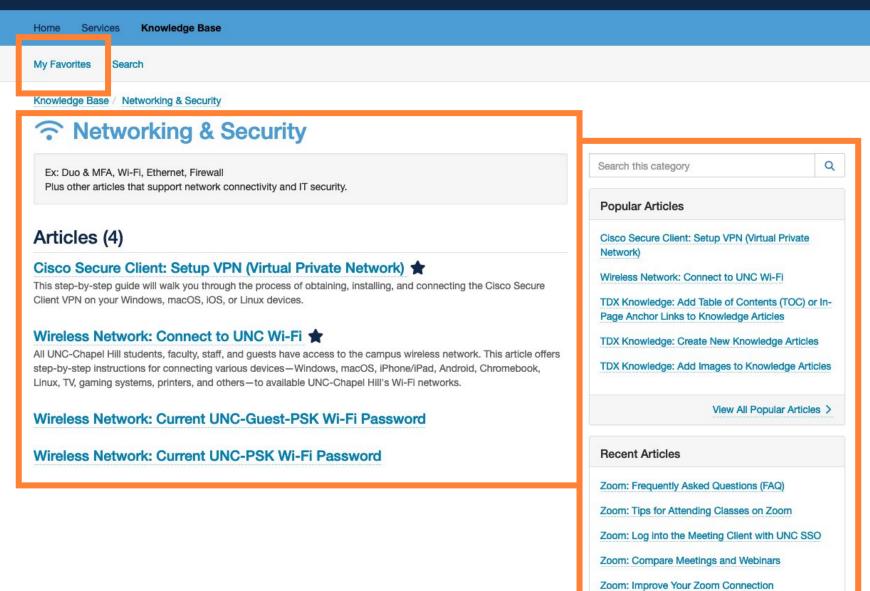
My Favorites Search

Knowledge Base





View All Recent Articles >







Home Services Knowledge Base

My Favorites Search

My Favorite Articles (6)

Cisco Secure Client: Setup VPN (Virtual Private Network)

Knowledge Base / Networking & Security

This step-by-step guide will walk you through the process of obtaining, installing, and connecting the Cisco Secure Client VPN on your Windows, macOS, iOS, or Linux devices. Favorited on Wed 5/8/24 4:44 PM

ConnectCarolina: Obtain Guest ID

Knowledge Base / Accounts & Access

A Guest ID is a temporary account provided to former employees, former students, alumni, or individuals invited by current students to act as proxies for accessing non-billing information in ConnectCarolina. This article offers guidance on creating a Guest ID, as well as changing or resetting its password.

Favorited on Wed 5/8/24 4:46 PM

TDX Knowledge: Create New Knowledge Articles

Knowledge Base / Administrative & Business

This article provides step-by-step instructions to TeamDynamix Technicians on how to create a new Knowledge article.

Favorited on Wed 5/8/24 4:46 PM

TDX Knowledge: Knowledge Articles Format and Style Standards



Knowledge Base / Administrative & Business

This article covers the standards for formatting and styling TDX Knowledge Base articles to ensure consistency, accessibility, and quality in the information presented to TDX users. All articles in the TDX Knowledge Base must adhere to these standards.

Favorited on Wed 5/8/24 4:48 PM

Wireless Network: Connect to UNC Wi-Fi

Remove

Knowledge Base / Networking & Security

All UNC-Chapel Hill students, faculty, staff, and guests have access to the campus wireless network. This article offers step-by-step instructions for connecting various devices— Windows, macOS, iPhone/iPad, Android, Chromebook, Linux, TV, gaming systems, printers, and others—to available UNC-Chapel Hill's Wi-Fi networks.

Favorited on Wed 5/8/24 4:44 PM

Zoom: Improve Your Zoom Connection

Knowledge Base / Communication & Collaboration

This document offers ways to improve your Zoom experience if the video or audio becomes choppy or distorted.

Favorited on Wed 5/8/24 4:47 PM





UNC Customer

Home

Services

Knowledge Base

My Favorites

Search

Knowledge Base / Networking & Security / Wireless Network: Connect to UNC Wi-Fi

Wireless Network: Connect to UNC Wi-Fi

wireless-Network • Wi-Fi • UNC-PSK-Wi-Fi • Eduroam-Wi-Fi

All UNC-Chapel Hill students, faculty, staff, and guests have access to the campus wireless network. This article offers step-by-step instructions for connecting various devices—Windows, macOS, iPhone/iPad, Android, Chromebook, Linux, TV, gaming systems, printers, and others—to available UNC-Chapel Hill's Wi-Fi networks.

Available Wireless Networks

The following wireless networks are available on campus.

UNC-Setup

This is used to onboard new devices to the primary Wi-Fi eduroam.

UNC-Guest

This is an open network that provides Internet access to guests in select areas of campus. Departments may make a request to have the UNC-Guest network added to a specific area.

UNC-Guest-PSK (for example 23-24-UNC-Guest-PSK)

The Pre-Shared Key (PSK) Wi-Fi is for guests who are visiting campus for a specific, short-term, university-related function such as a conference or a dental appointment.

To connect to this Wi-Fi, you will need the Current UNC-Guest-PSK Password.

Eduroam

This is the primary campus wireless network.

Please click the link below for instructions on how to connect your device to this wireless network.

- Connecting Android to Eduroam Wi-Fi
- · Connecting Chromebook to Eduroam Wi-Fi
- · Connecting iOS (iPhone/iPad) to Eduroam Wi-Fi
- Connecting Linux to Eduroam Wi-Fi
- · Connecting macOS to Eduroam Wi-Fi
- · Connecting Windows to Eduroam Wi-Fi

UNC-PSK (for example 23-24-UNC-PSK)

Share

Created
Thu 5/2/24 9:20 AM

Modified
Tue 5/7/24 2:07 PM

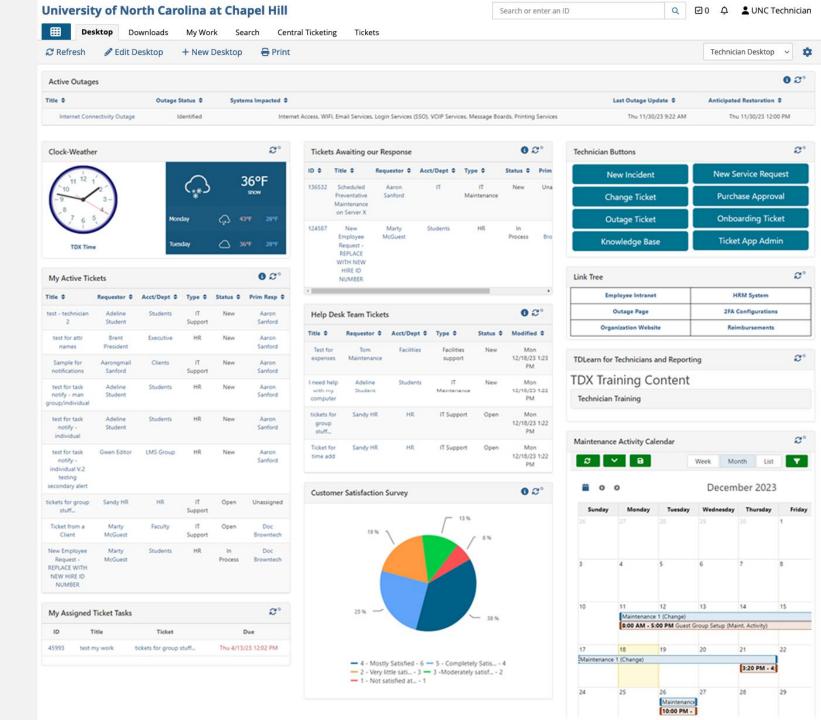
Attachments (0)



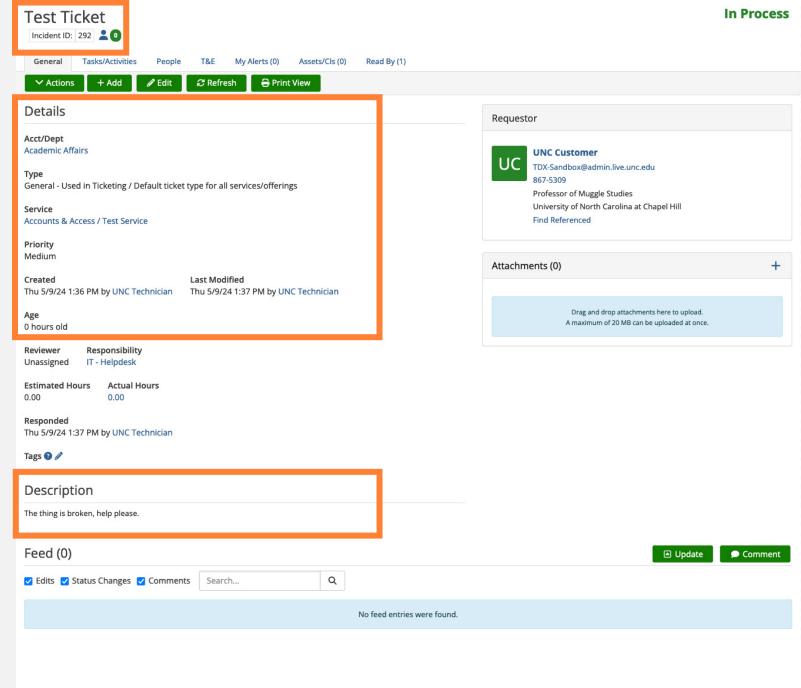
TDX PREVIEW

TDNext – Back End Agent View

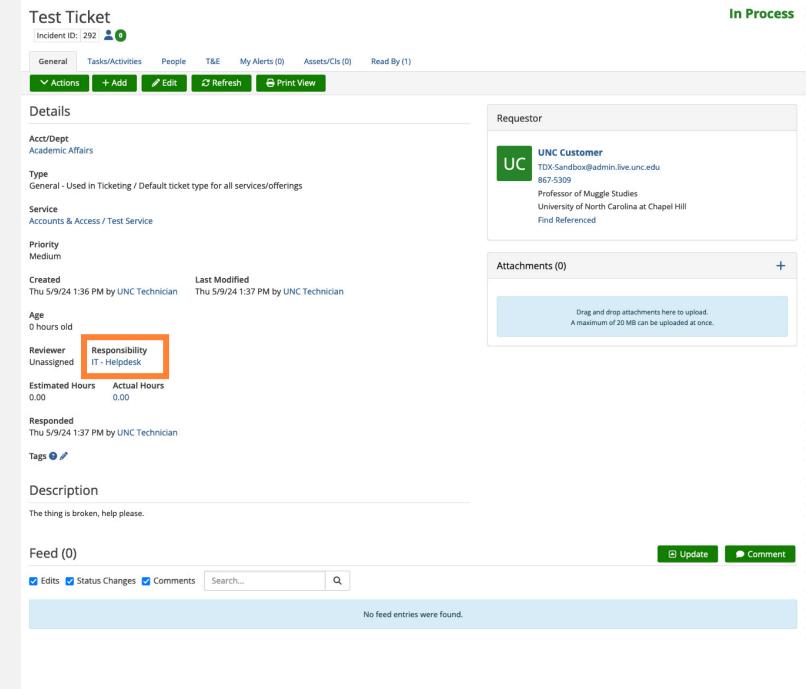
TDNext:Desktop (Dashboard)



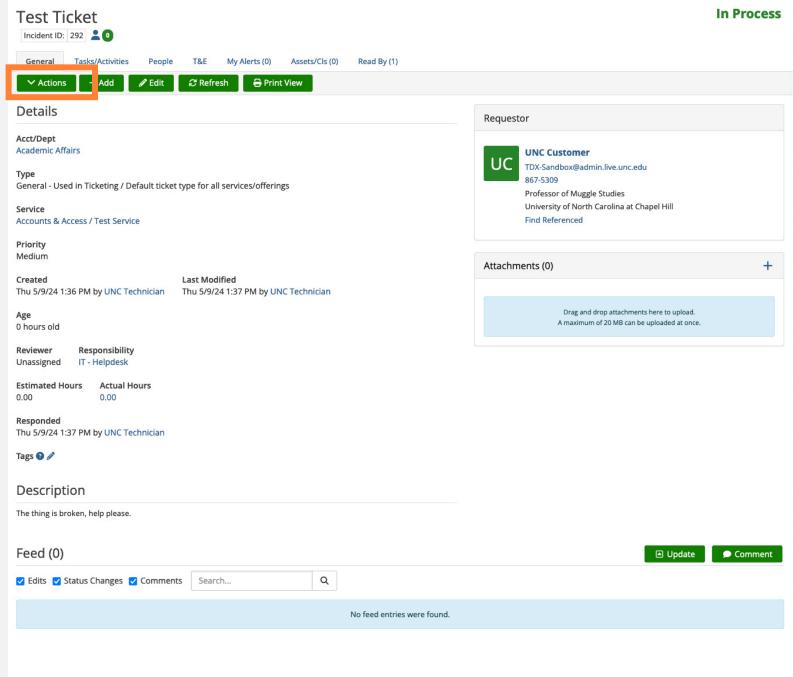
TDNext: Incident



TDNext: Responsibility

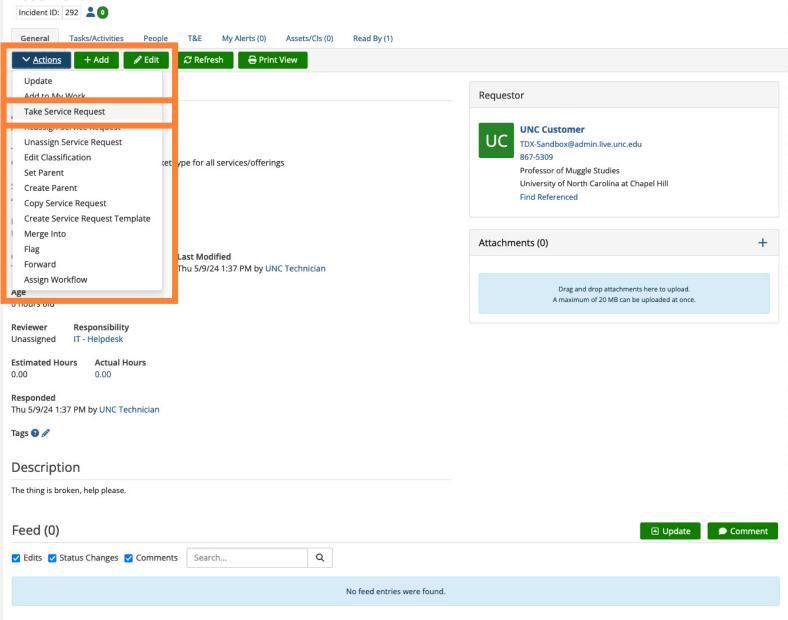


TDNext: Take Ticket

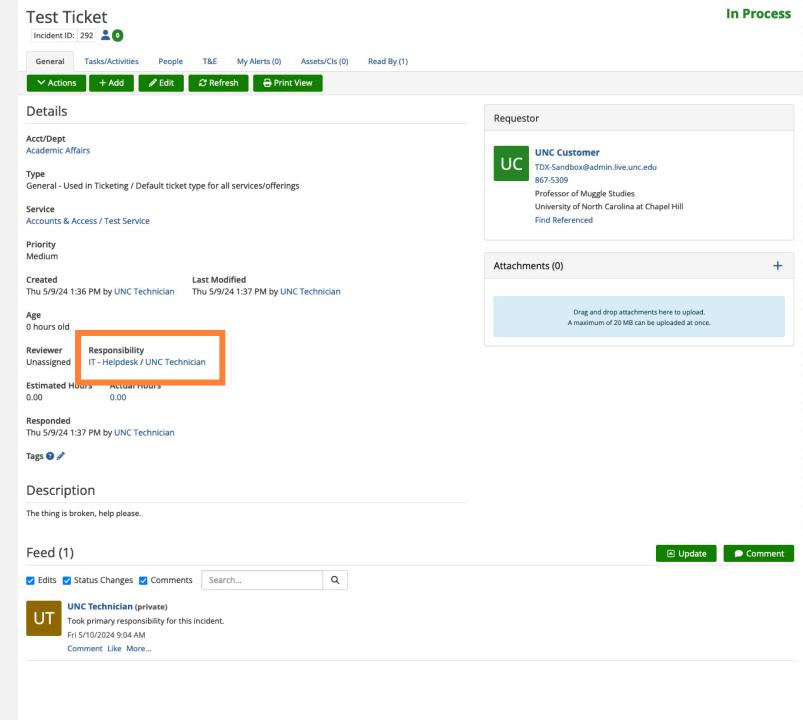


TDNext: Take Ticket

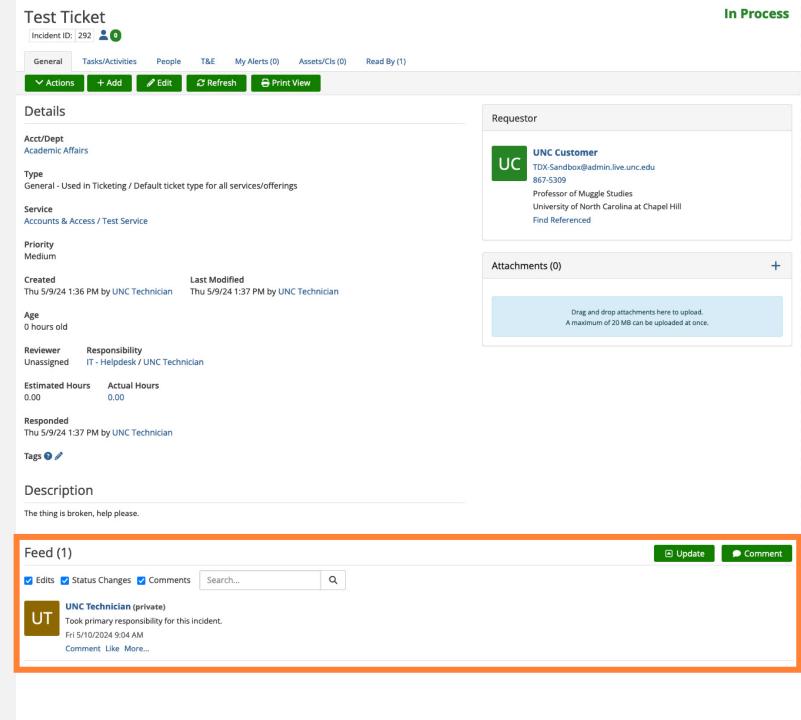
Test Ticket In Process



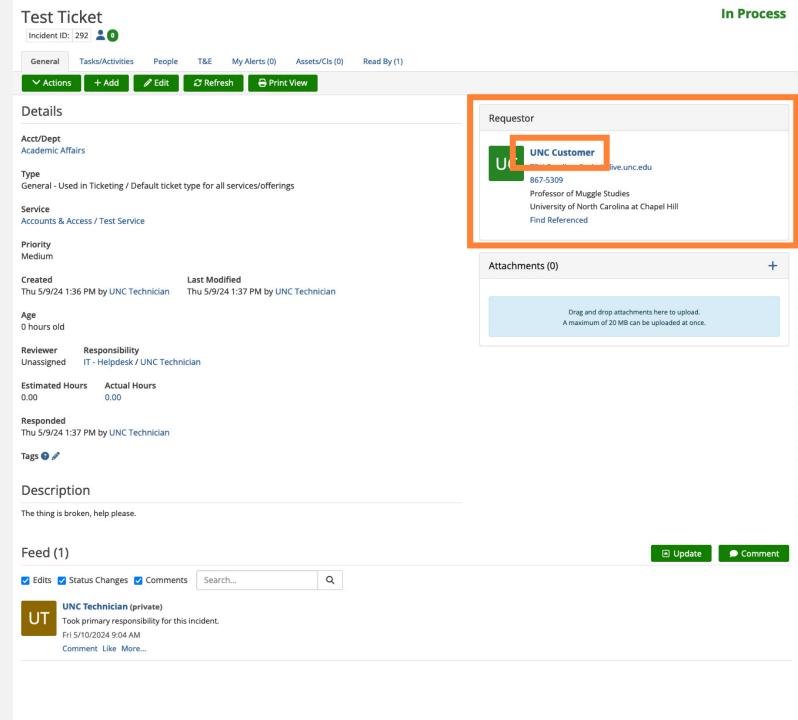
TDNext: Responsibility



TDNext: Feed



TDNext:Requestor Information



TDNext:Requestor Information



Active

General



Details

Organization

University of North Carolina at Chapel Hill

Title

Professor of Muggle Studies

Acct/Dept

Academic Affairs

Primary Functional Role

Participant

Created

Tue 2/27/24 2:05 PM

Modified

Thu 5/9/24 2:02 PM by Calvin Groves

Time Zone

(GMT-05:00)Eastern Time(US and Canada)

Contact Information

Primary Email

TDX-Sandbox@admin.live.unc.edu

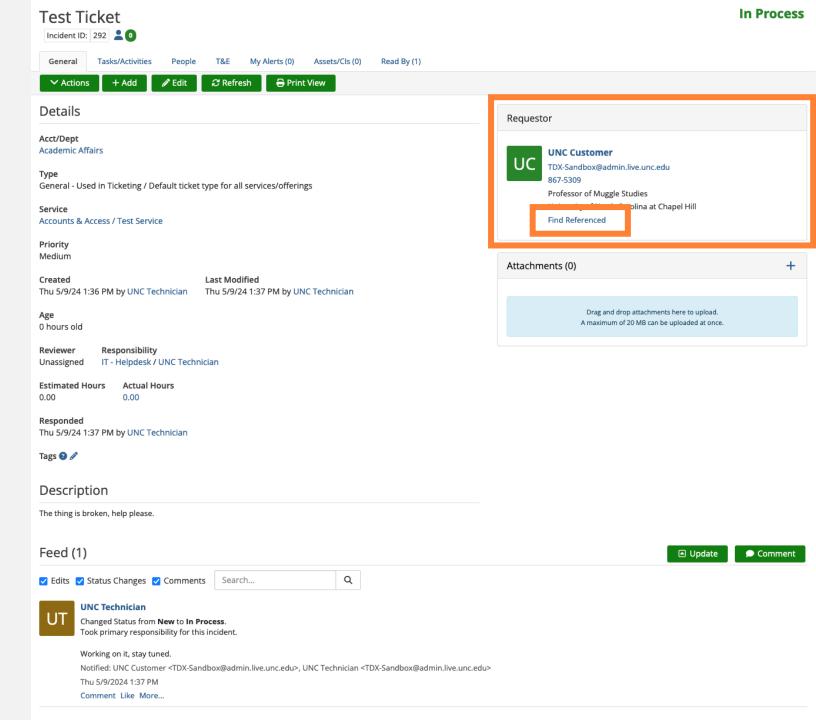
Work Phone

867-5309 (Preferred)

Work Address

The University of North Carolina at Chapel Hill Chapel Hill, NC 27599

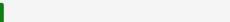
TDNext:Requestor History



TDNext: Requestor History

✓ My Saved Searches **♂** Refresh ■ Save Search







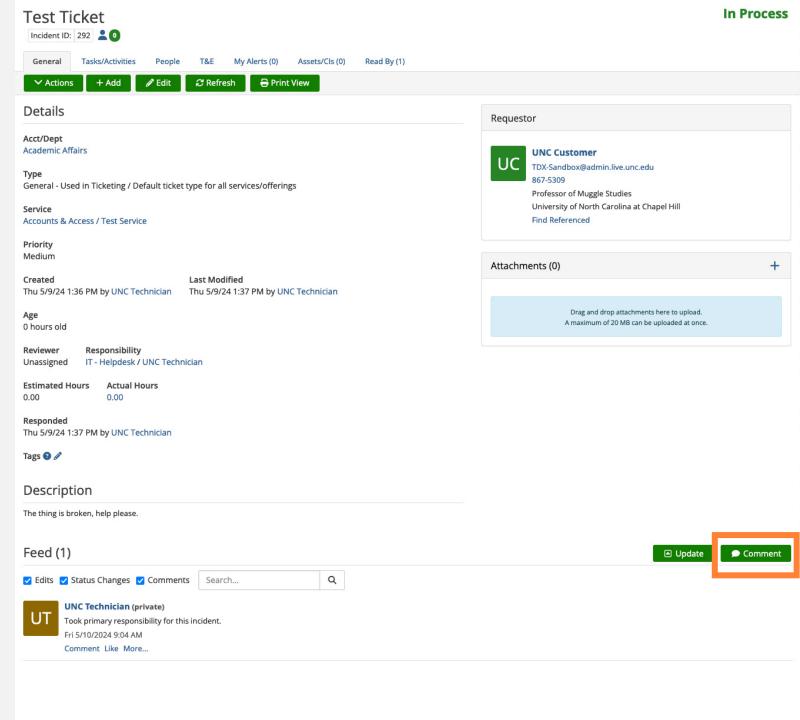
Tickets (12)

✓ Actions

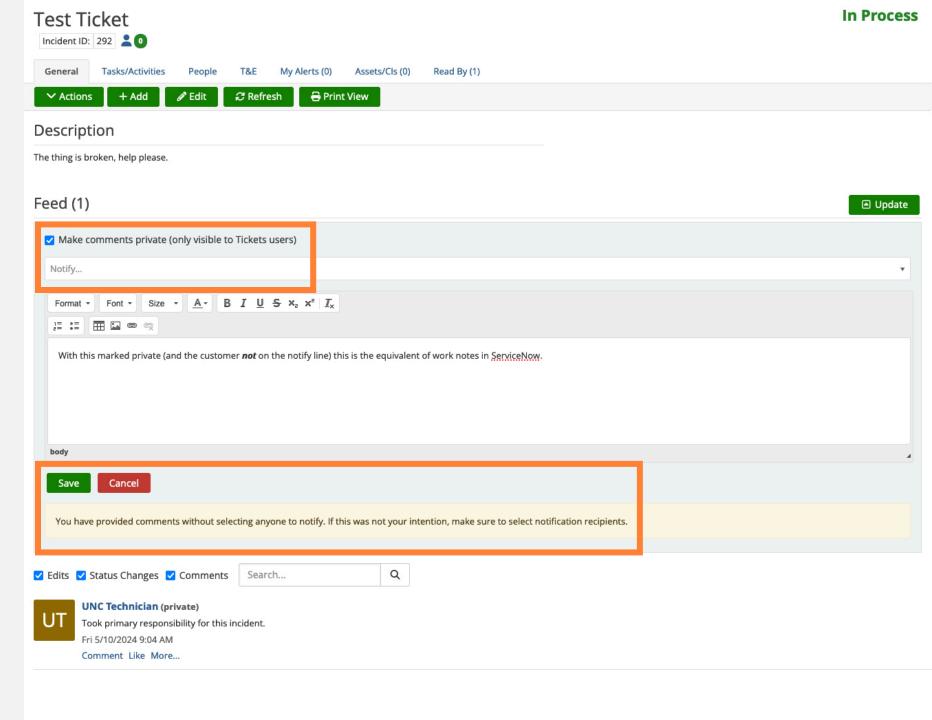
∨ III **-**Group By...

ID \$	Title \$	Classification \$	Requestor \$	Acct/Dept \$	Type Category ‡	Туре 💠	Status 💠	Priority \$	Reviewer \$	Pri Resp 💠	Date Due 💠	Modified \$
292	Test Ticket	Incident	UNC Customer	Academic Affairs	General - Used in Ticketing	Default ticket type for all services/ offerings	In Process	Medium	Unassigned	IT - Helpdesk / UNC Technician		Thu 5/9/24 1:37 PM
287	test ticket	Service Request	UNC Customer	Academic Affairs	General - Used in Ticketing	Default ticket type for all services/ offerings	Open	Medium	Unassigned	IT - Helpdesk / Calvin Groves		Wed 5/8/24 4:38 PM
135	Test	Incident	UNC Customer	Academic Affairs	General - Used in Ticketing	Default ticket type for all services/ offerings	New	Medium	Unassigned	SOMIT-Hub- Core		Fri 5/3/24 10:24 AM
226	Testing	Incident	UNC Customer	Academic Affairs	General - Used in Ticketing	Default ticket type for all services/ offerings	New	Medium	Unassigned	Unassigned		Tue 4/30/24 3:14 PM
196	Test submission from POSTMAN with apikey auth	Incident	UNC Customer	Academic Affairs	General - Used in Ticketing	Default ticket type for all services/ offerings	New	Low	Unassigned	TeamDynamix Admins		Fri 4/26/24 8:32 AM
127	Demo request	Incident	UNC Customer	Academic Affairs	General - Used in Ticketing	Default ticket type for all services/ offerings	In Process	Medium	Unassigned	Group A		Wed 4/24/24 2:23 PM
154	SOM -	Incident	LINC	Academic	General - Used in	Default	New	Medium	Unassigned	SOMIT-Hub-		Wed 4/24/24 11:46 AM

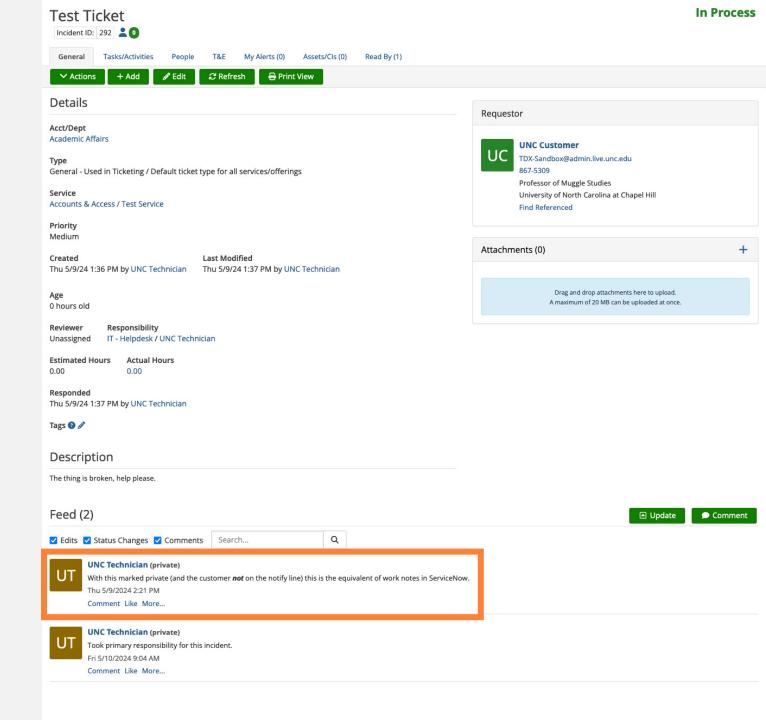
TDNext: Comment

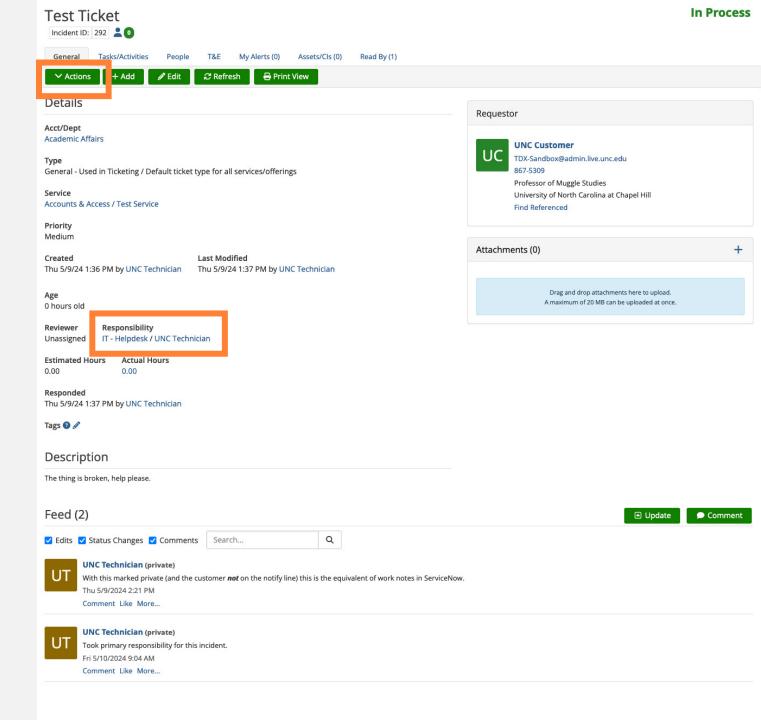


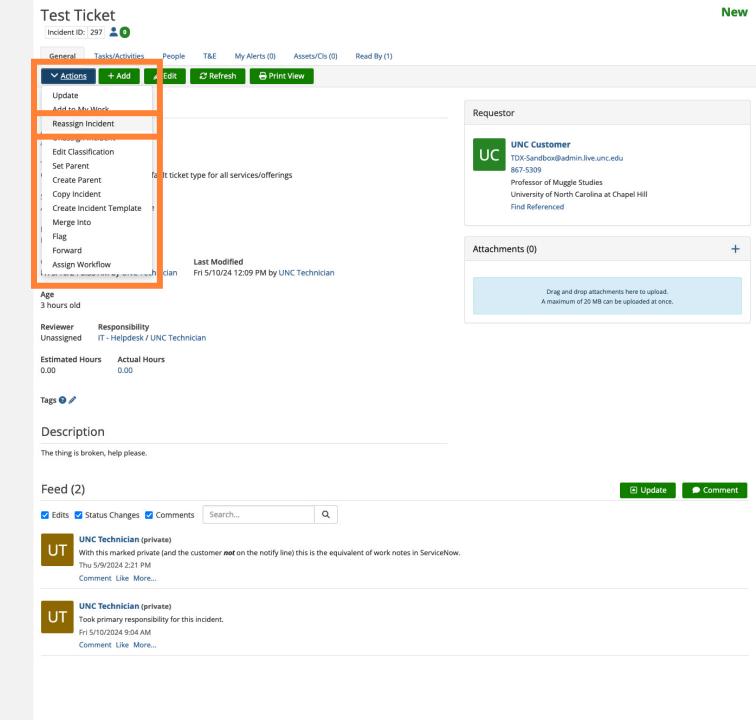
TDNext: Comment

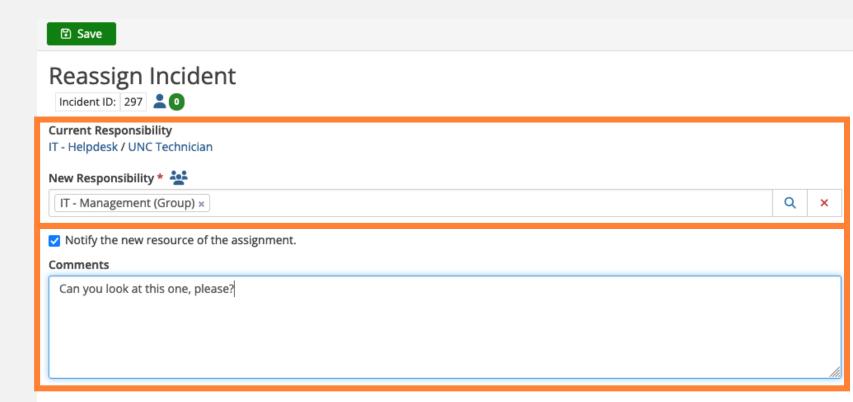


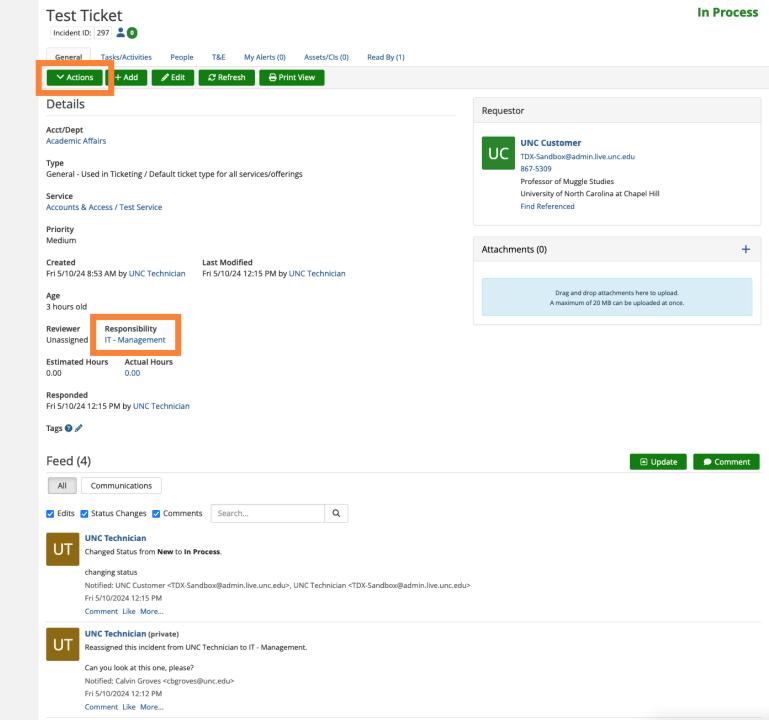
TDNext: Comment

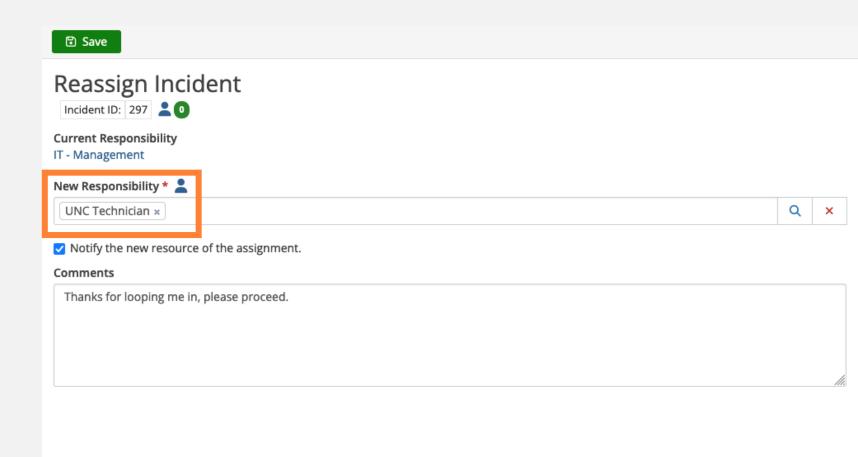




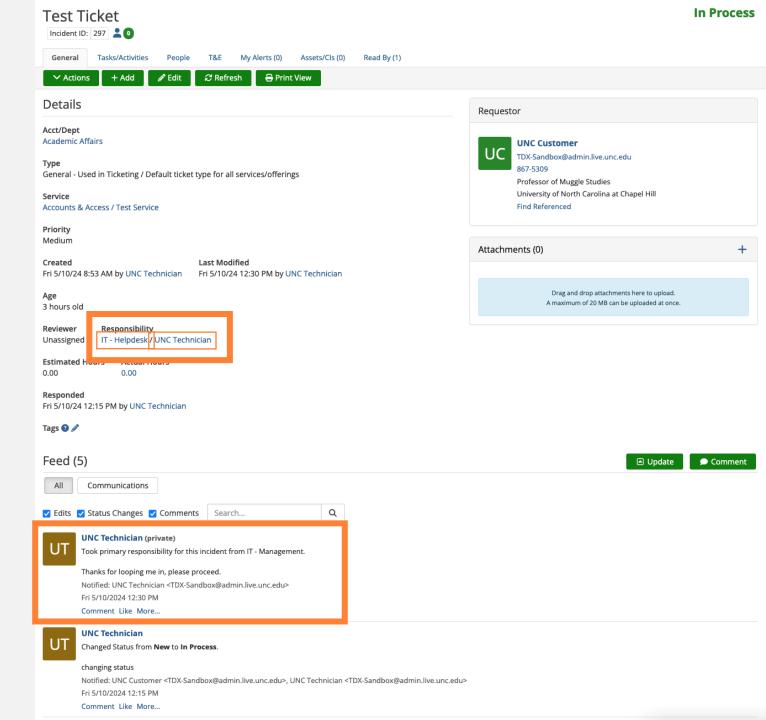


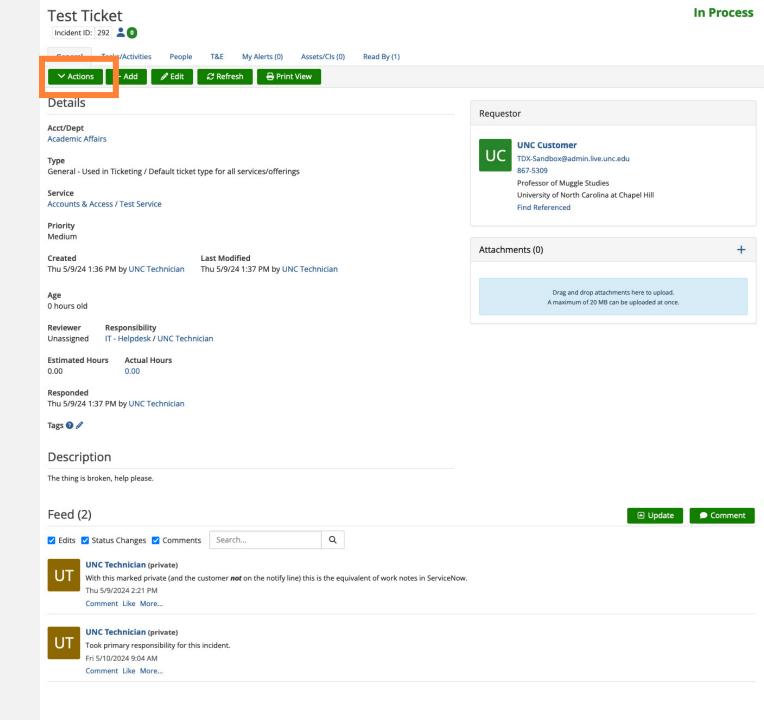


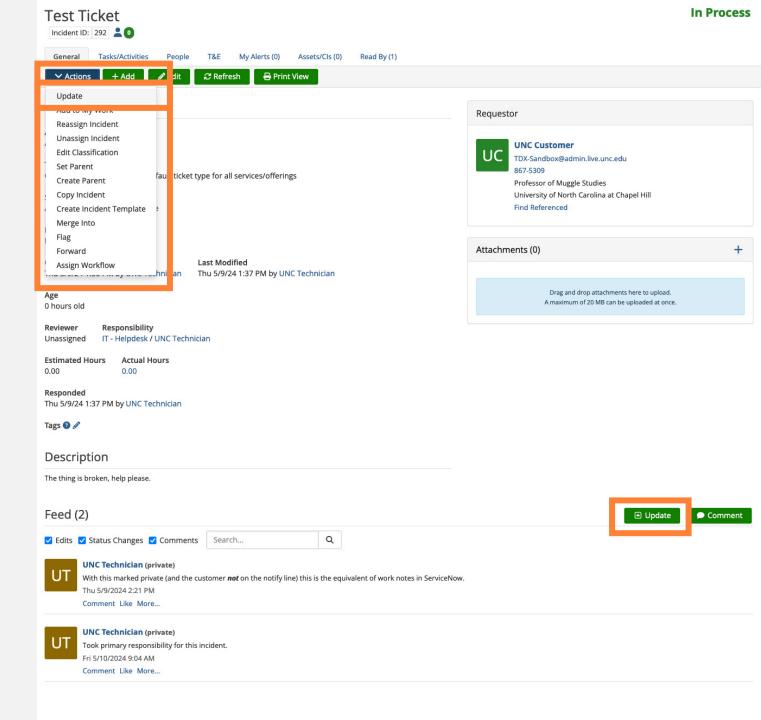


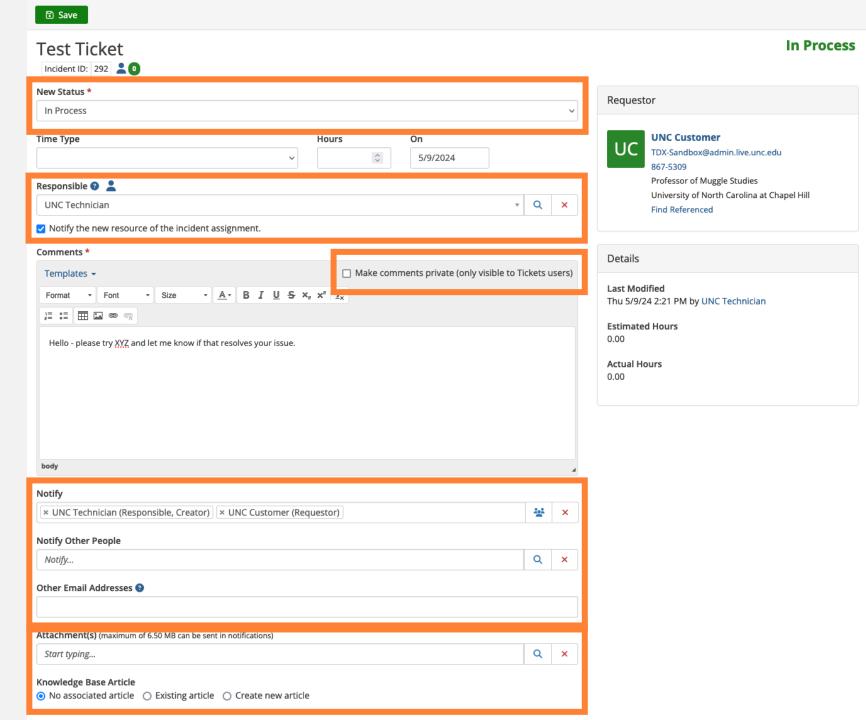


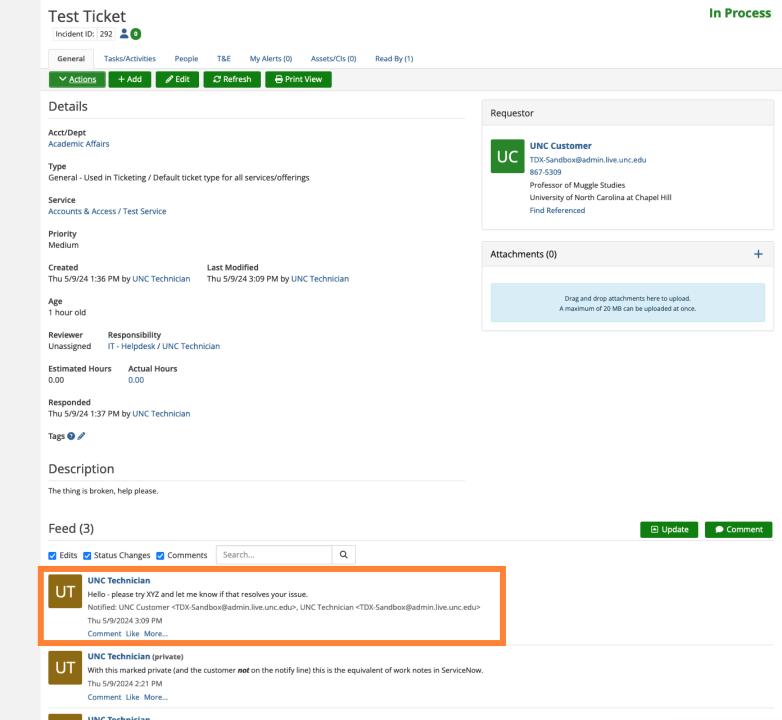
TDNext:Reassign Ticket & Primary Group



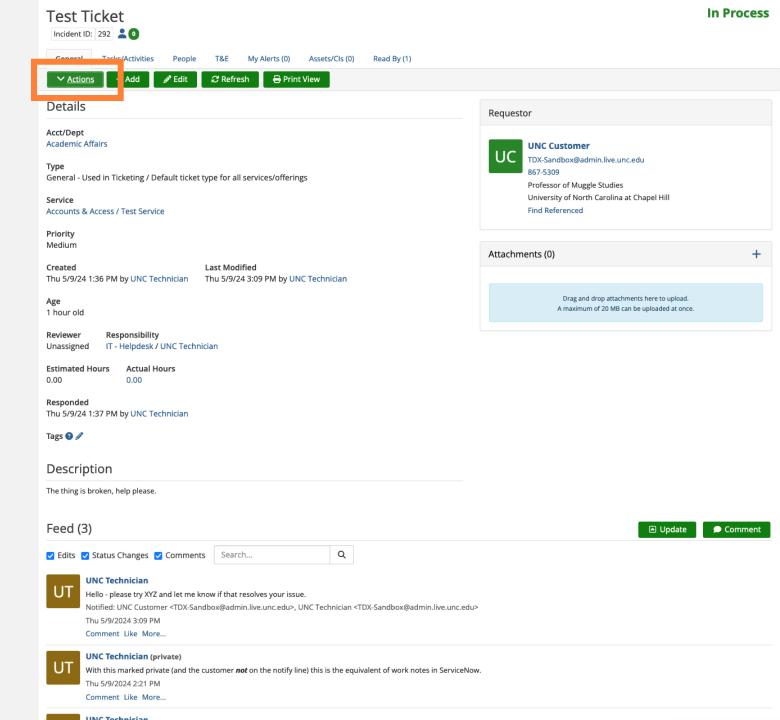




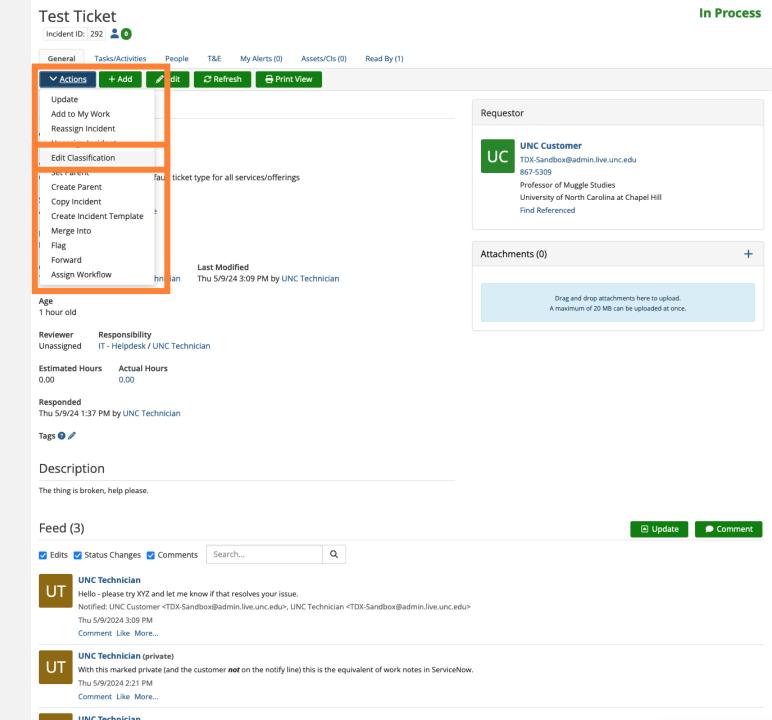




TDNext: Reclassify Ticket



TDNext: Reclassify Ticket



TDNext: Reclassify Ticket



Edit Classification

Incident ID: 292 20
Current Classification

Current Classification

Incident

New Classification *



Incident

Major Incident

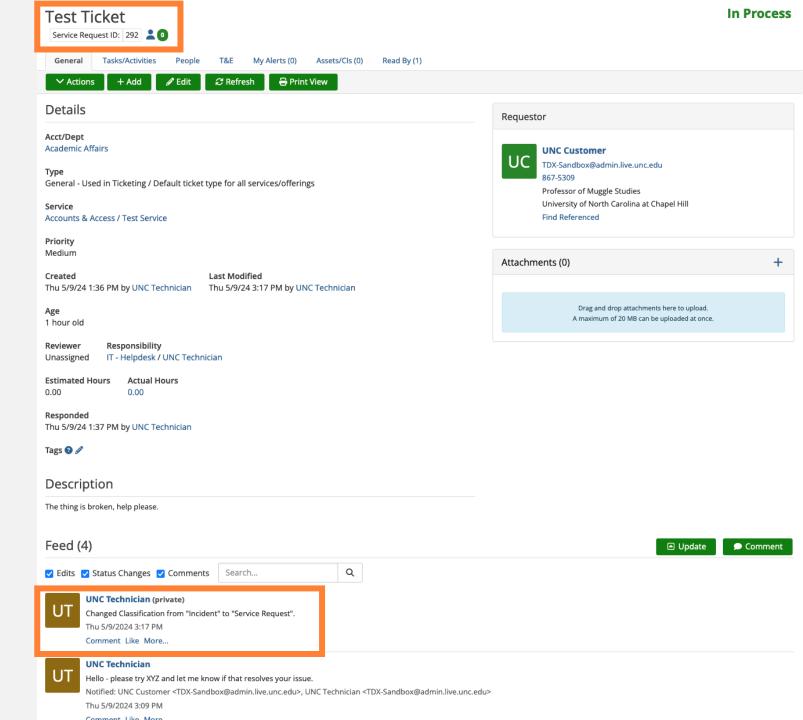
Known Issue

Change

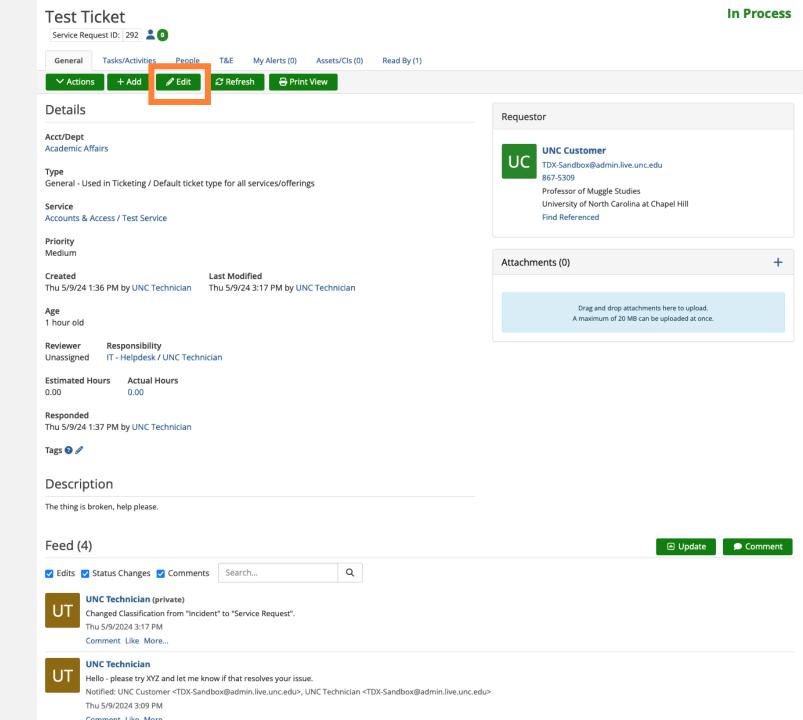
Release

Service Request

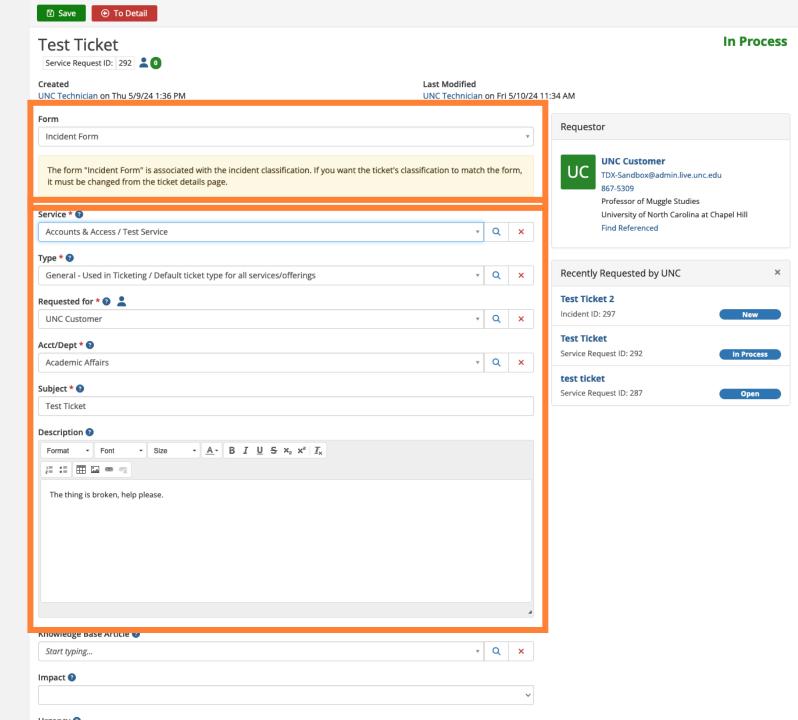
TDNext: Service Request



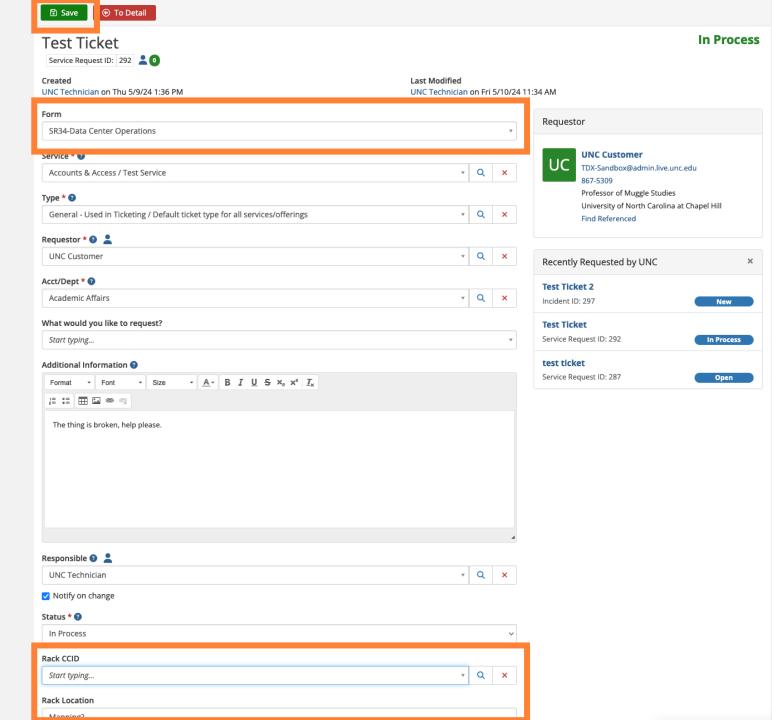
TDNext: Edit Ticket



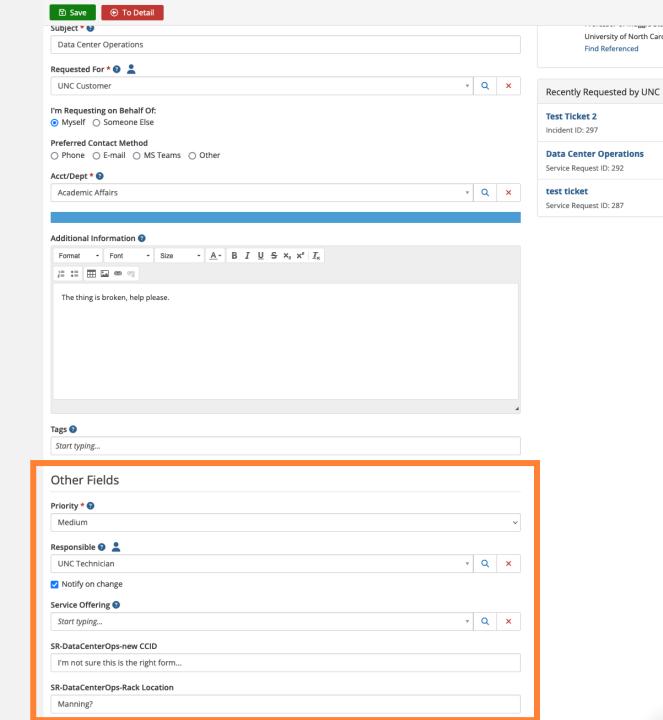
TDNext: Edit Ticket



TDNext: Change Form



TDNext: Other Fields



University of North Carolina at Chapel Hill

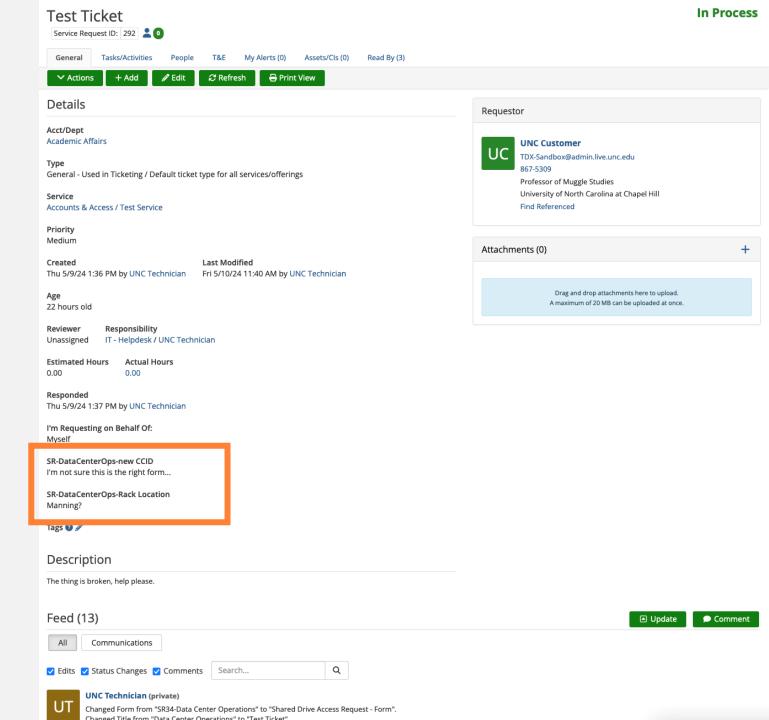
New

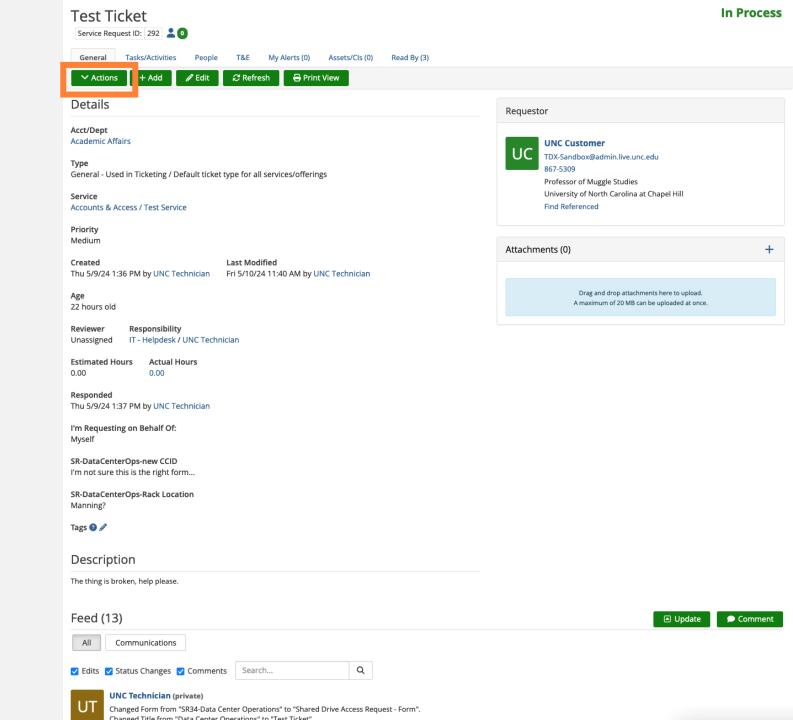
In Process

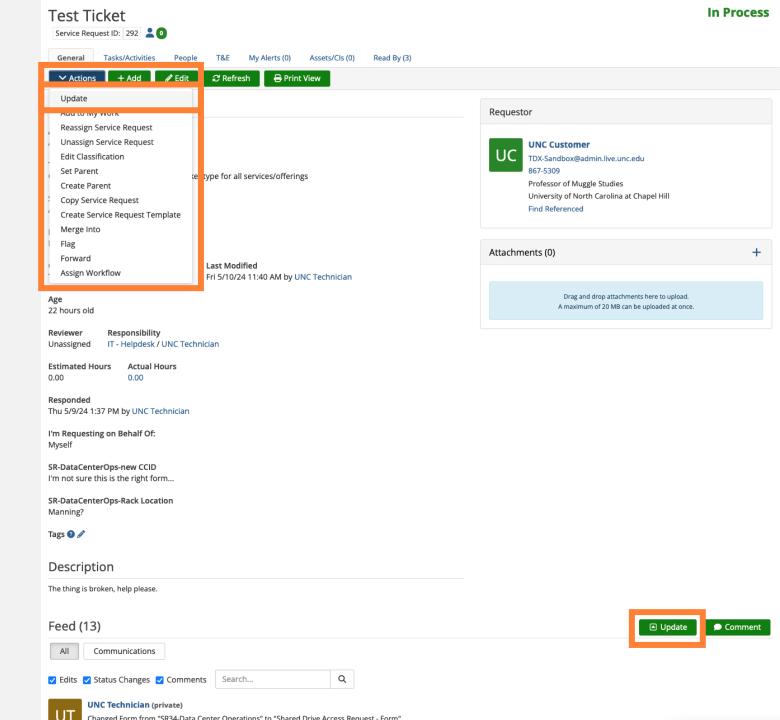
Open

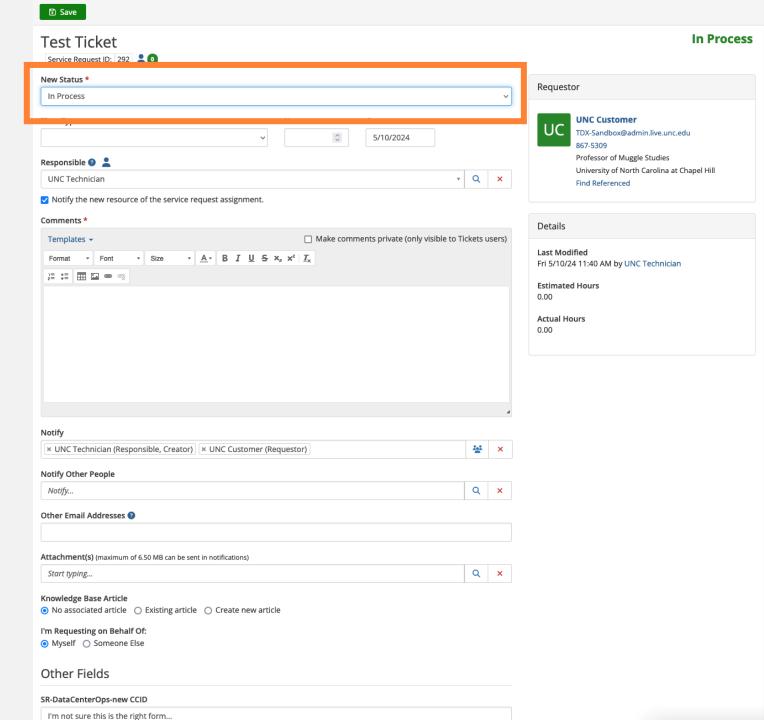
Find Referenced

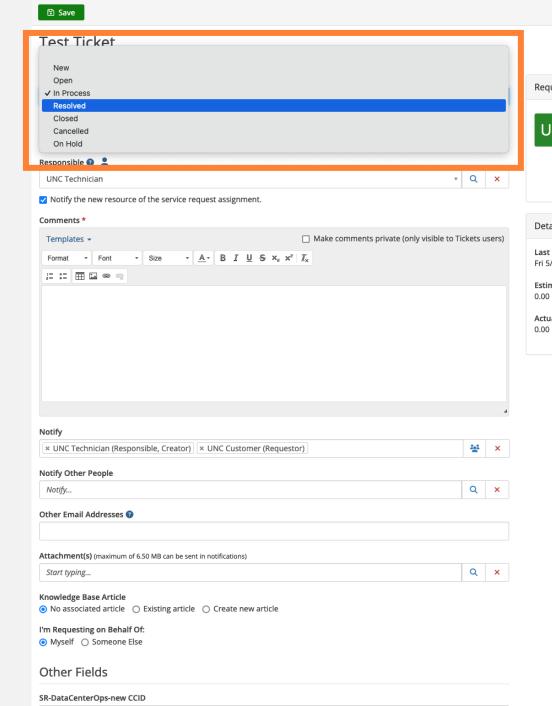
TDNext: Other Fields







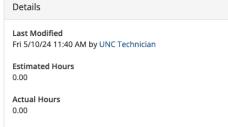


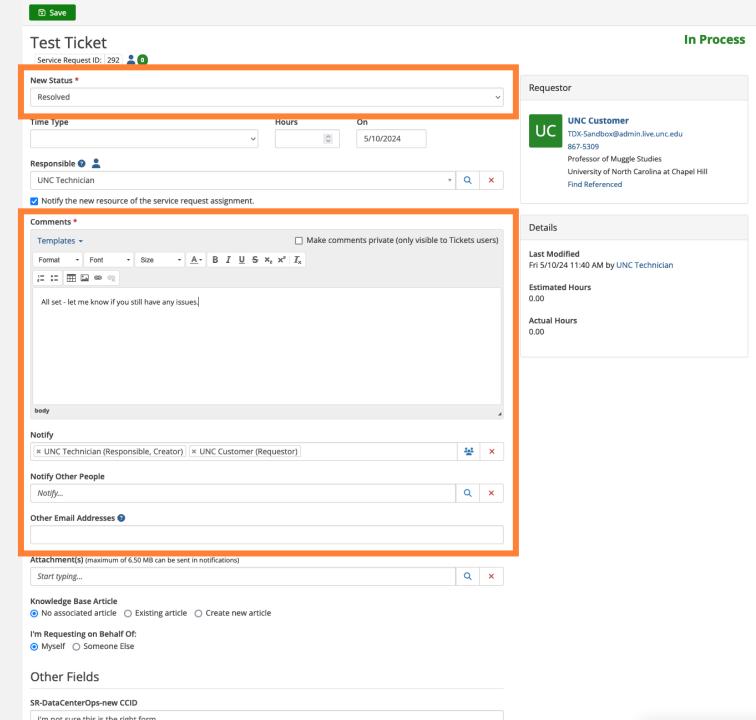


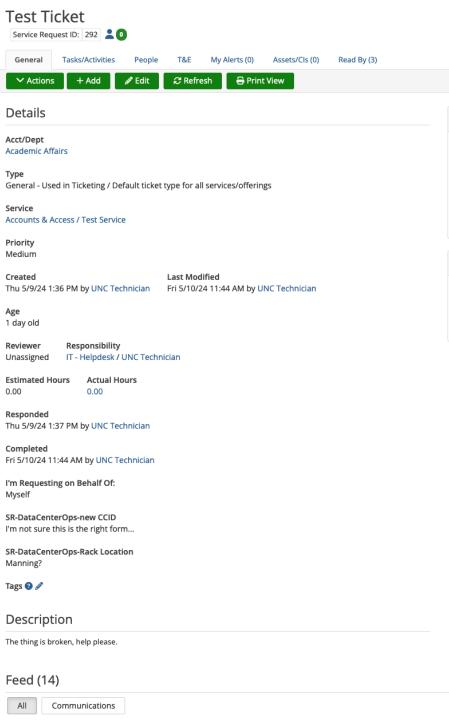
I'm not sure this is the right form..

In Process

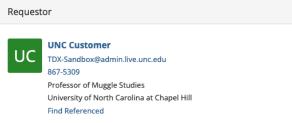


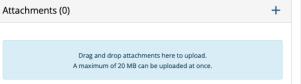
















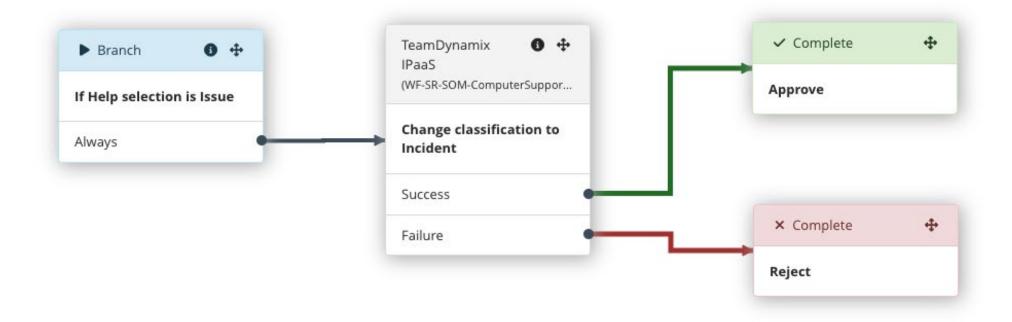


TDX WORKFLOWS

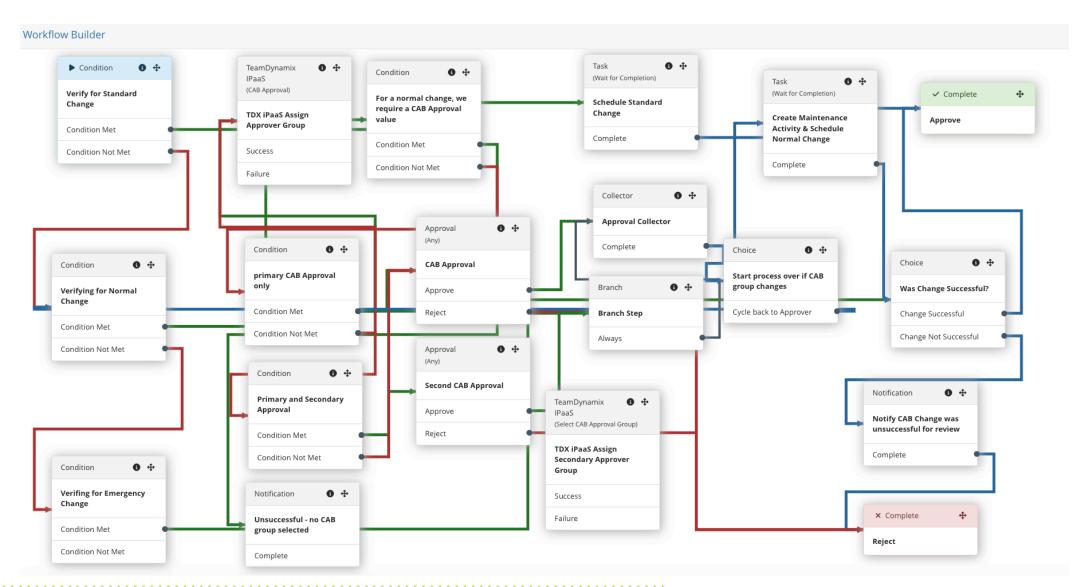
Workflow Previews

SIMPLE WORKFLOW

Workflow Builder



COMPLEX WORKFLOW





WHAT'S NEXT

Training and Communications

Instructor-Led Training

Agent (Level 1) - 1 hour session

Intended for anyone who will have access to work tickets in TDX

- Tuesday, June 18 10:00am 11:00am
- Thursday, June 20 2:00pm 3:00pm
- "Super" Agent (Level 2) 1 hour session (pre-req: Level 1 training)
 Intended for anyone who will work tickets in TDX on a daily, or almost daily, basis
 - Tuesday, June 25 2:00pm 3:00pm
 - Thursday, June 27 10:00am 11:00am

We will record and share one session from each level.

Workshops

Reporting and Dashboards

Intended for anyone who will prepare reports (including dashboards) in TDX

Wednesday, June 19 – TBD Date changed to Wednesday, June 26

Change Management - CAB Workflow

Intended for anyone who submits changes to a Change Advisory Board (CAB), as well as CAB members who approve changes

Wednesday, June 26 - TBD

Executive Level Reporting

Intended for anyone who will use our standard executive reports to make strategic decisions

Day and Time – TBD

We will record and share each session.

Office Hours for Early Access

- Week of June 24 Thursday
 - Monday, Wednesday 1:00pm 2:00pm
 - Tuesday, Thursday 10:00am 11:00am Friday
- Week of July 1
 - Monday, Wednesday 10:00am 11:00am
 - Tuesday 1:00pm 2:00pm

Sessions will not be recorded.

Office Hours **after** Go-live

- Go-live: Wednesday, July 10
- Week of July 8
 - Wednesday, Friday 1:00pm 2:00pm
 - Thursday 10:00am 11:00am
- Week of July 15
 - Monday, Wednesday 10:00am 11:00am
 - Tuesday 1:00pm 2:00pm

Sessions will not be recorded.

Communications





REMINDER:
AGENT EMAILS NOW BI-WEEKLY

WEBSITE: TARHEELS.LIVE/CUSTOMERSUPPORTTOOL



Q&A



