

CUSTOMER SUPPORT TOOL

TeamDynamix Town Hall

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

Presenter:

Calvin Groves, Director, Customer Support & Outreach, ITS-Customer Experience & Engagement

Moderator:

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

Today's Agenda

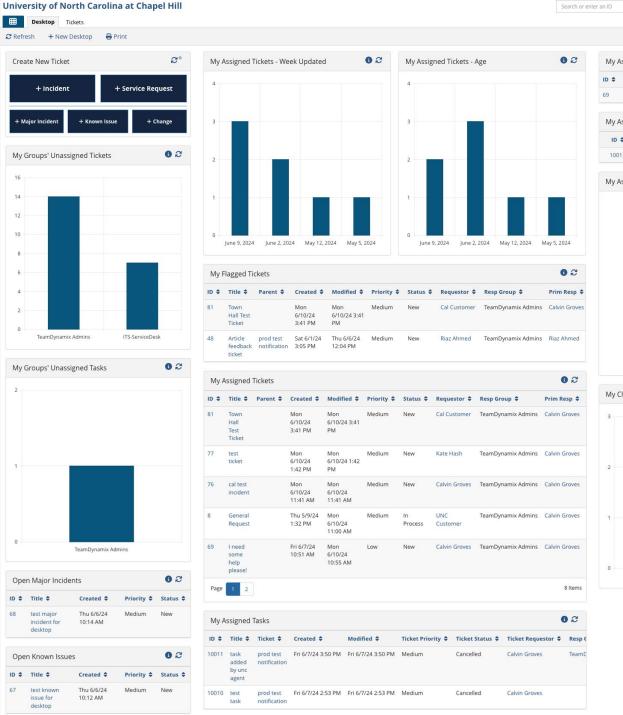
- 1 TeamDynamix preview, building on the first town hall
- 2 TeamDynamix early access format & responsibilities
- 3 Training details
- 4 How we're communicating to campus
- **5** Q&A

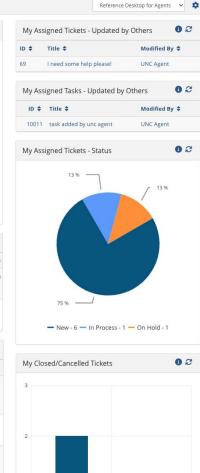


TEAMDYNAMIX PREVIEW

REFERENCE DESKTOP FOR AGENTS

Agent Desktop



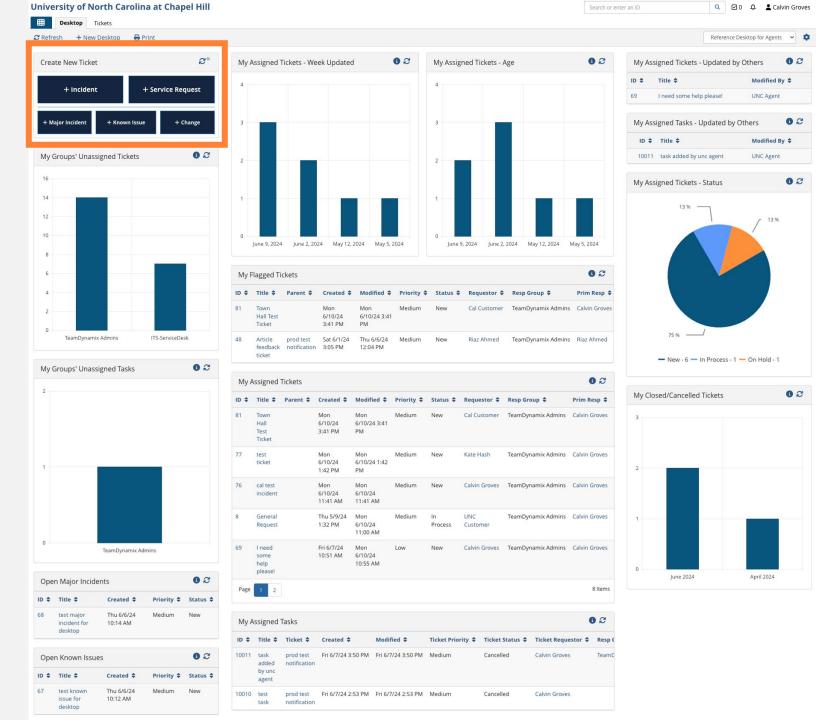


June 2024

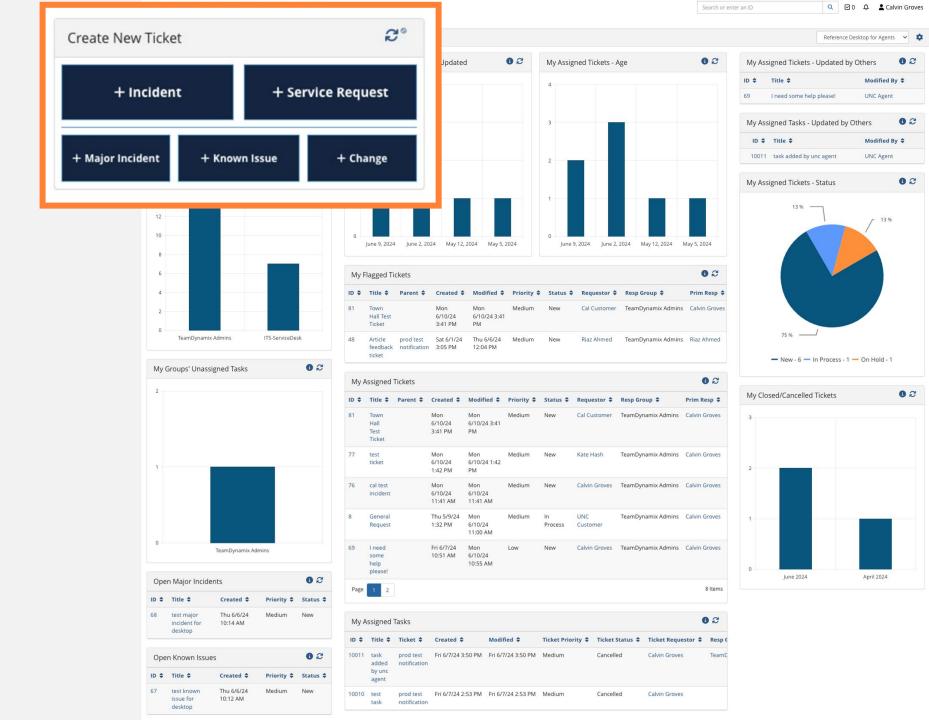
April 2024

Q 🗹 0 🗘 🚨 Calvin Groves

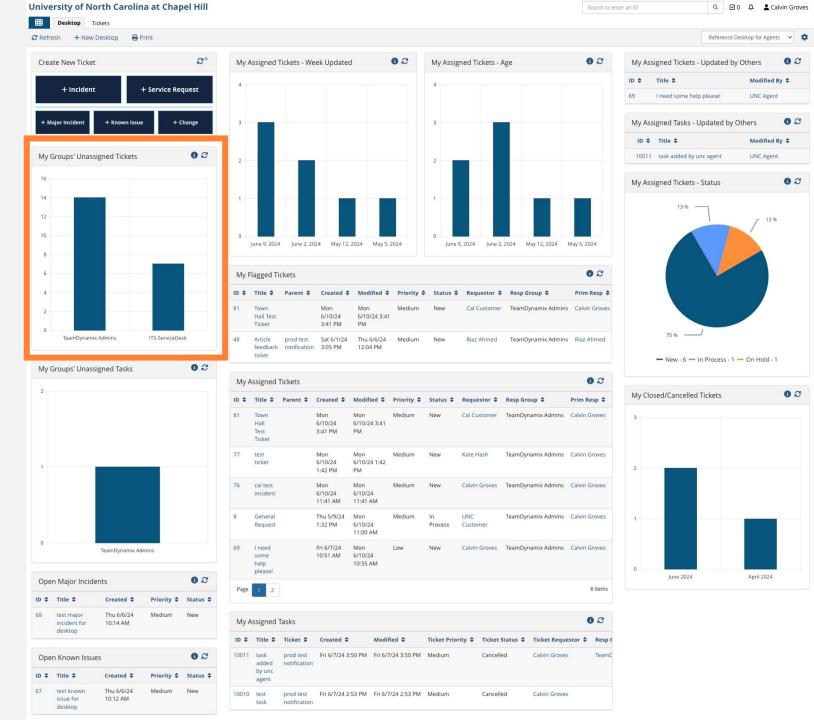
Agent Desktop: Create New Ticket



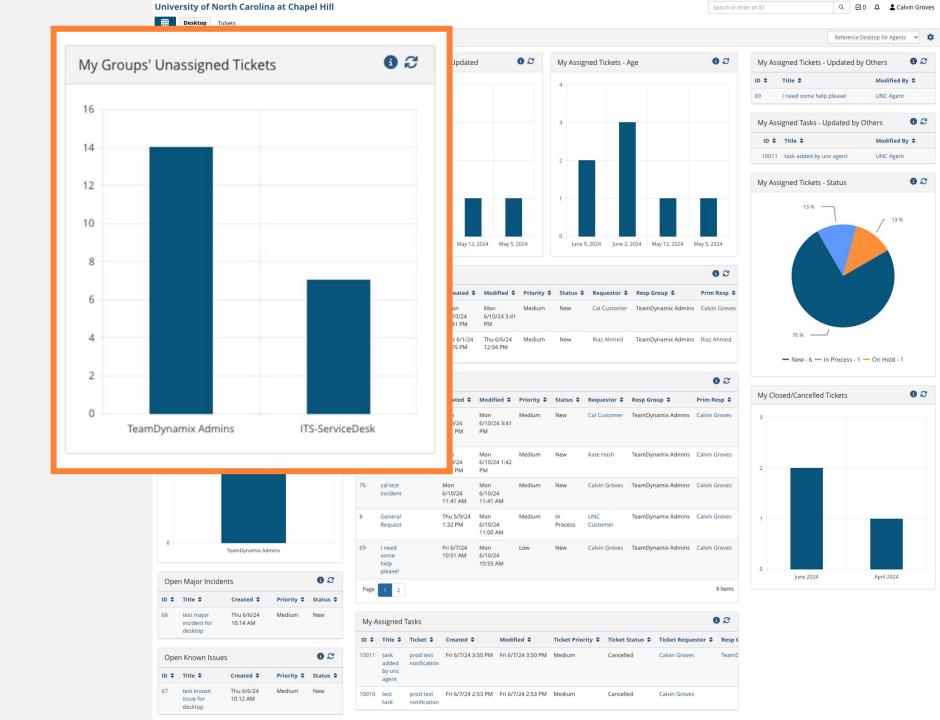
Agent Desktop: Create New Ticket



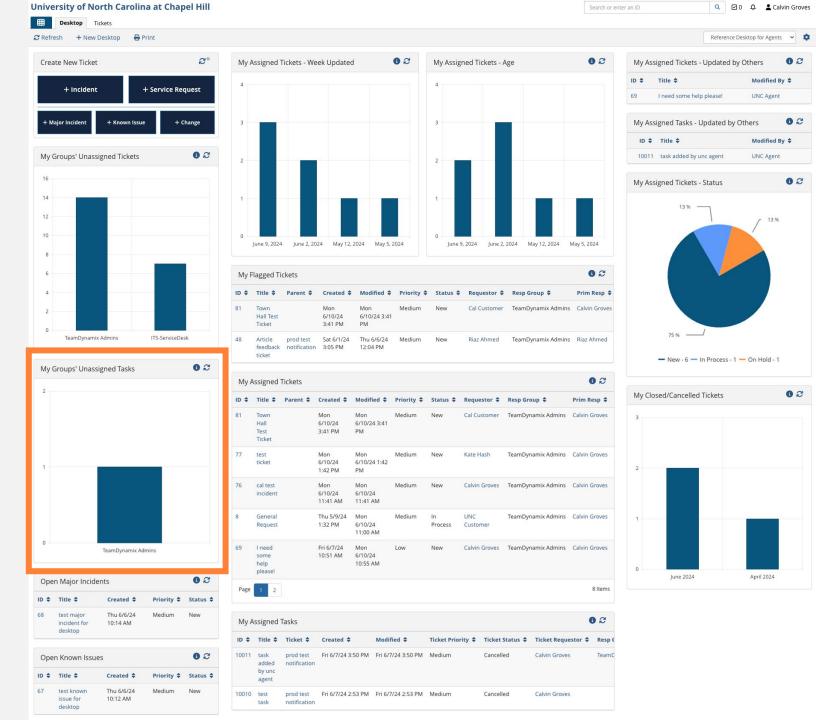
Agent Desktop: My Groups' Unassigned Tickets



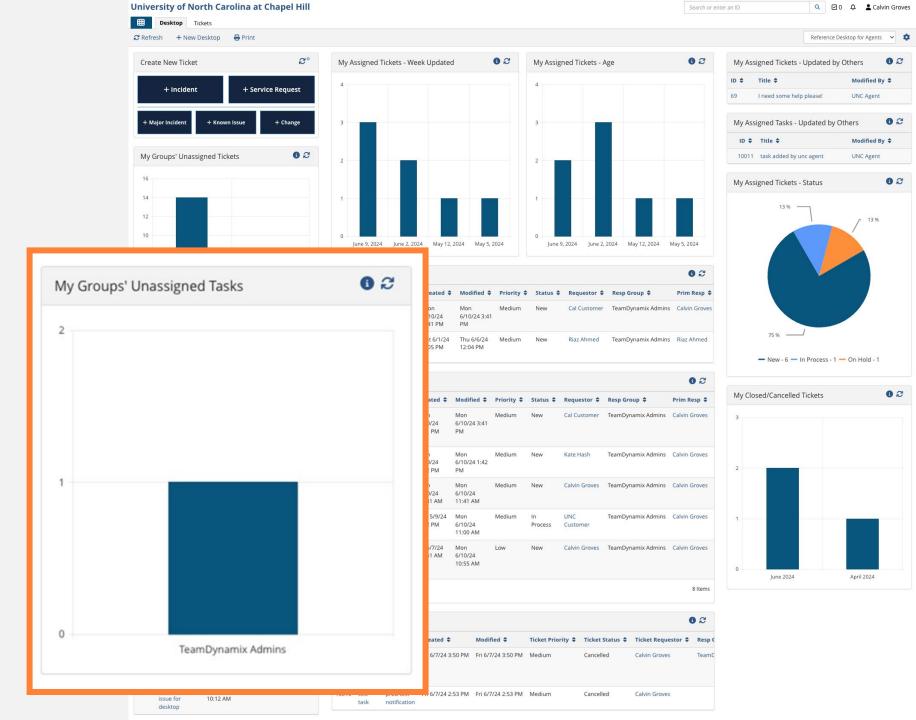
Agent Desktop: My Groups' Unassigned Tickets



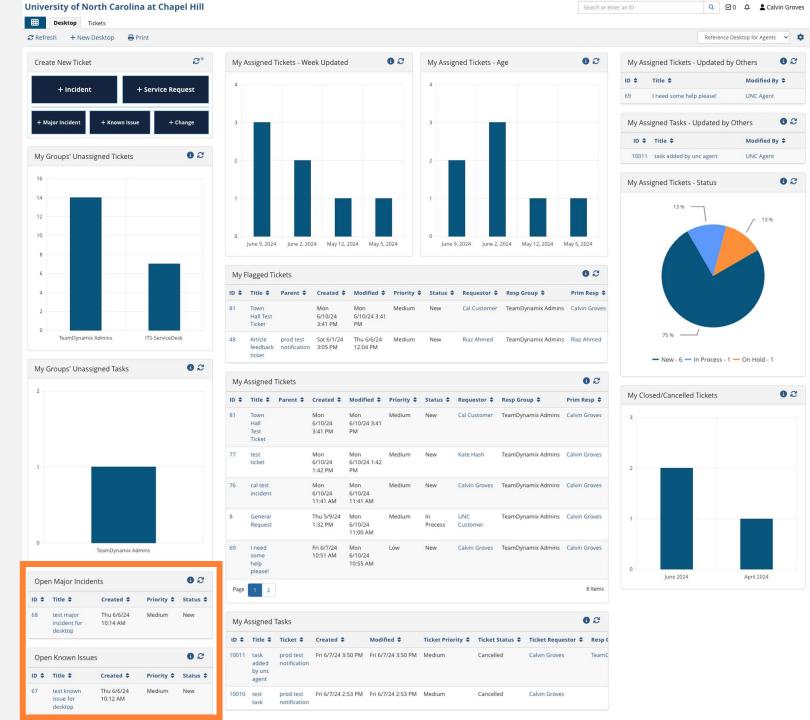
Agent Desktop: My Groups' Unassigned Tasks



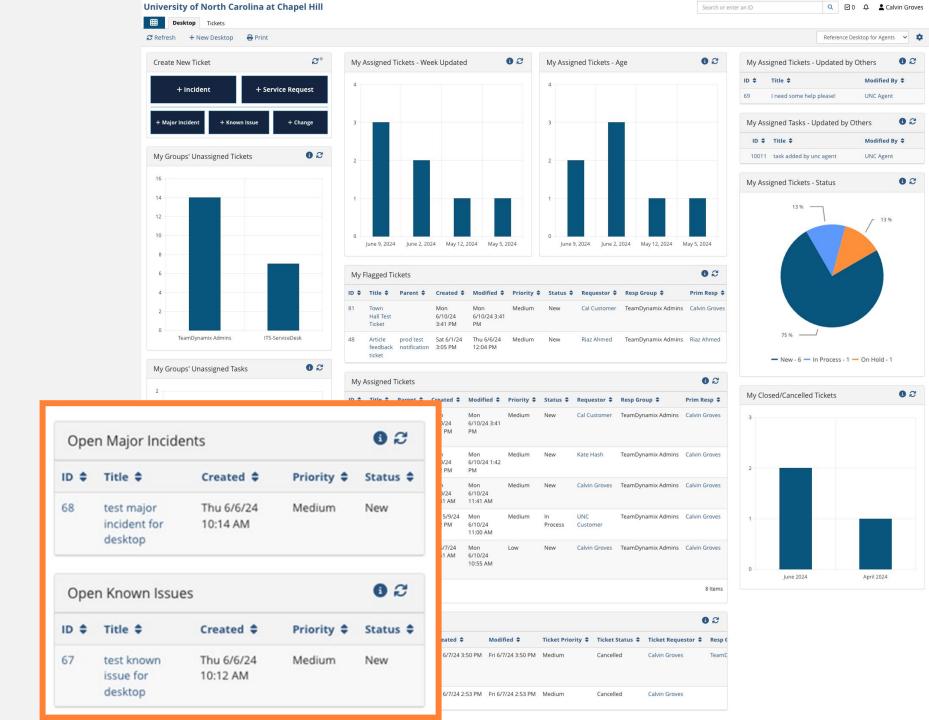
Agent Desktop: My Groups' Unassigned Tasks



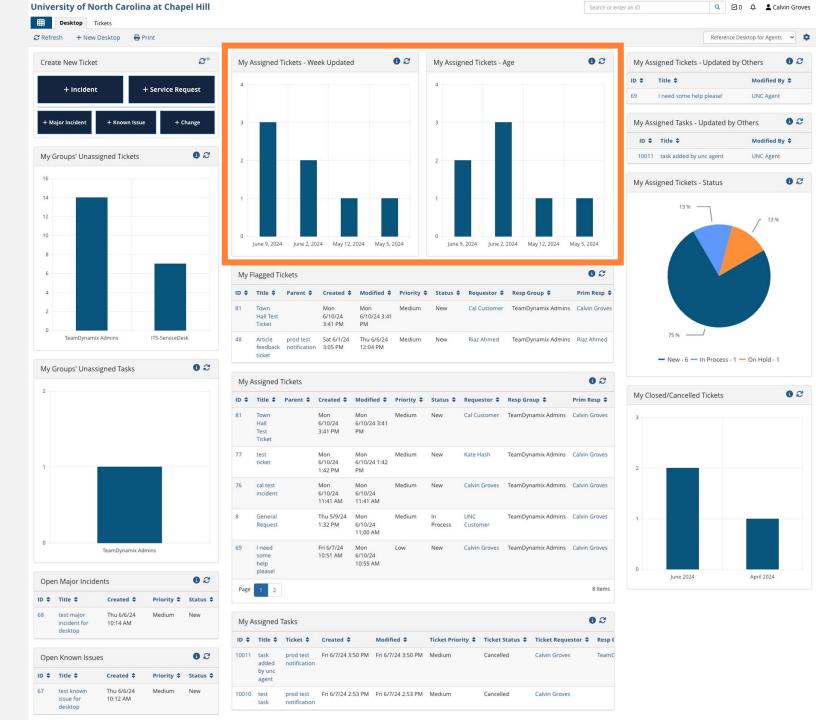
Agent Desktop: Open Major Incidents & Known Issues



Agent Desktop: Open Major Incidents & Known Issues



Agent Desktop: My Assigned Tickets – Week Updated & Age



Agent Desktop: My Assigned Tickets - Week Updated & Age

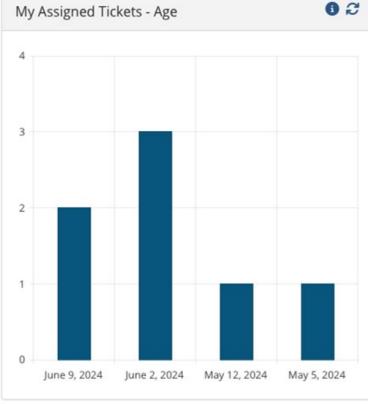


added

by unc

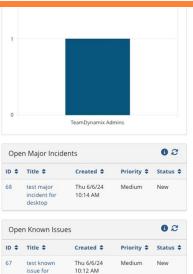
agent

tack



June 2024

April 2024

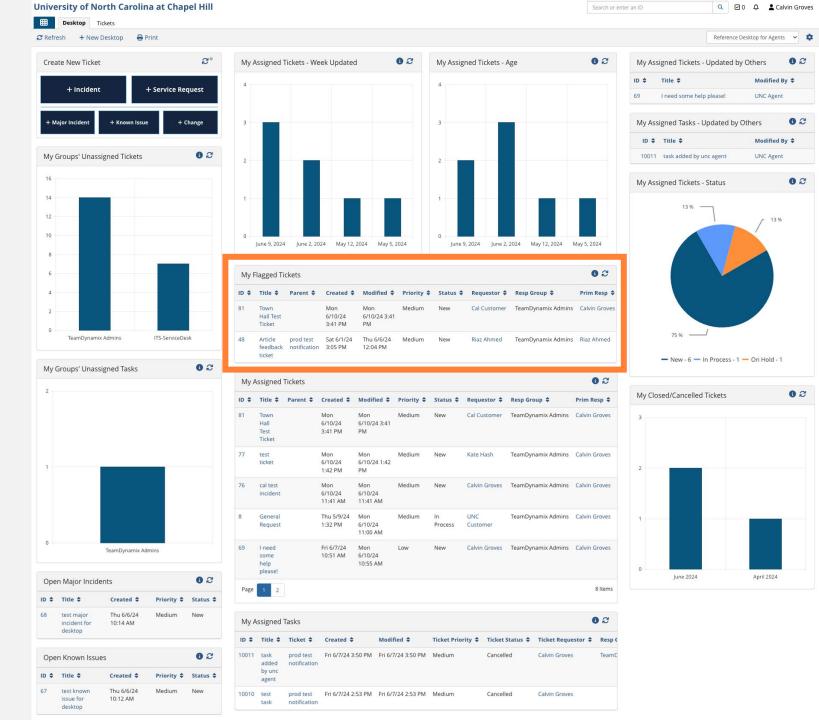


desktop

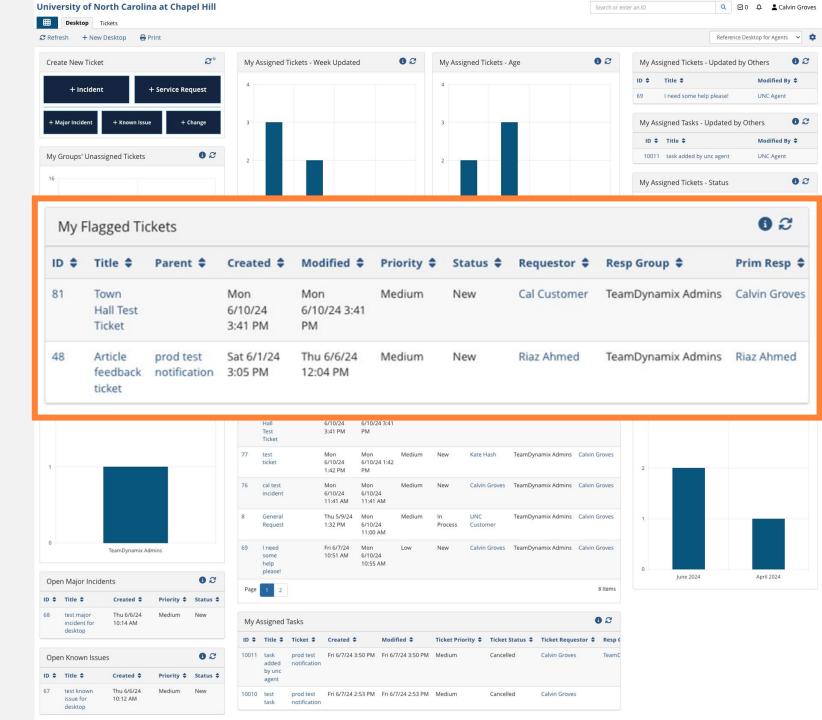




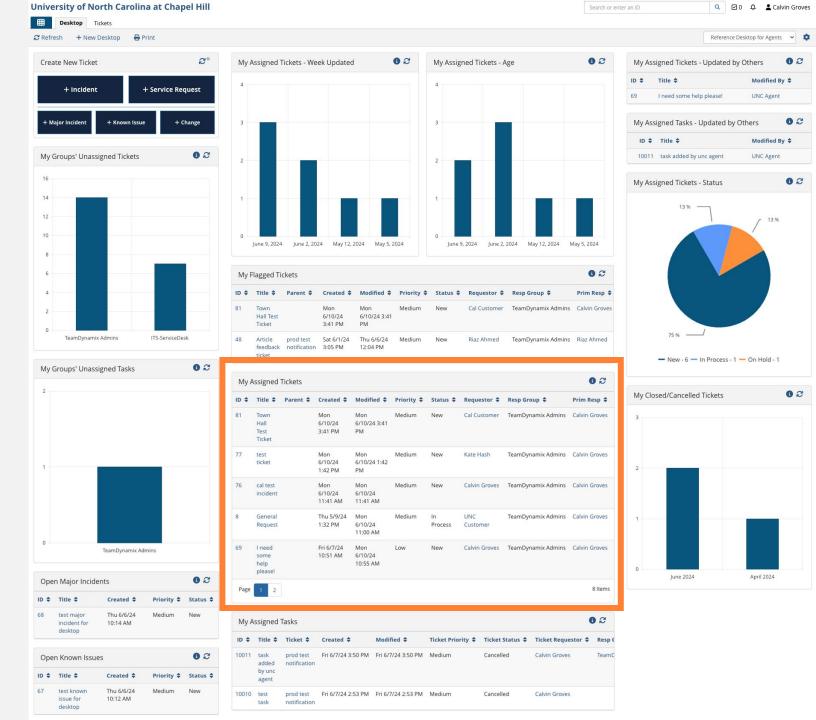
Agent Desktop: My Flagged Tickets



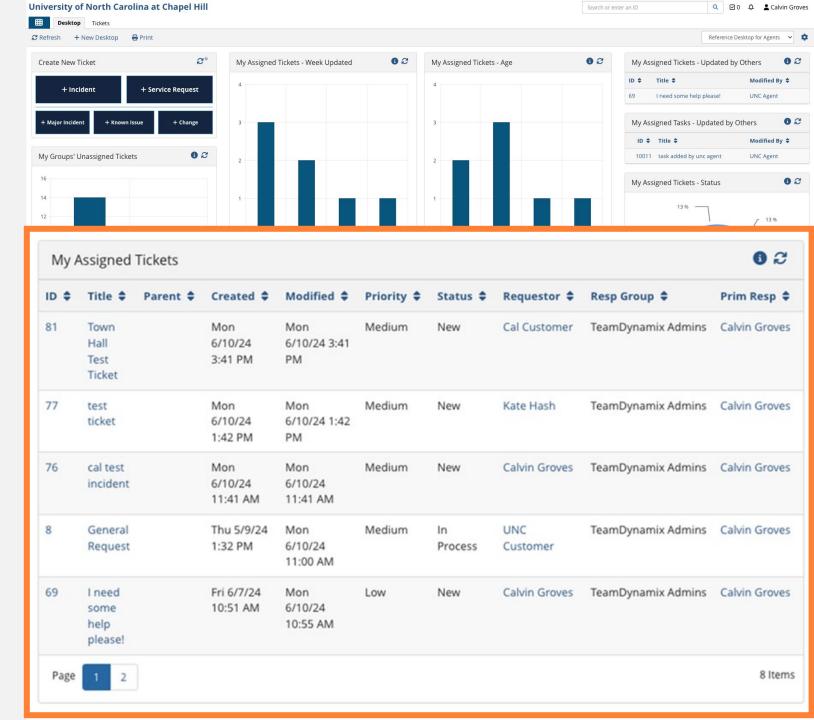
Agent Desktop: My Flagged Tickets



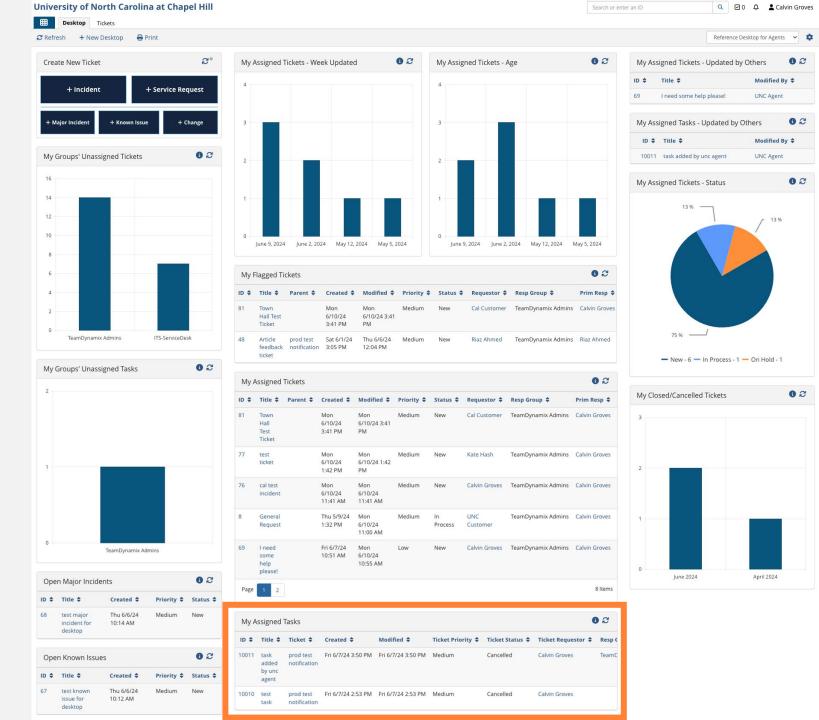
Agent Desktop: My Assigned Tickets



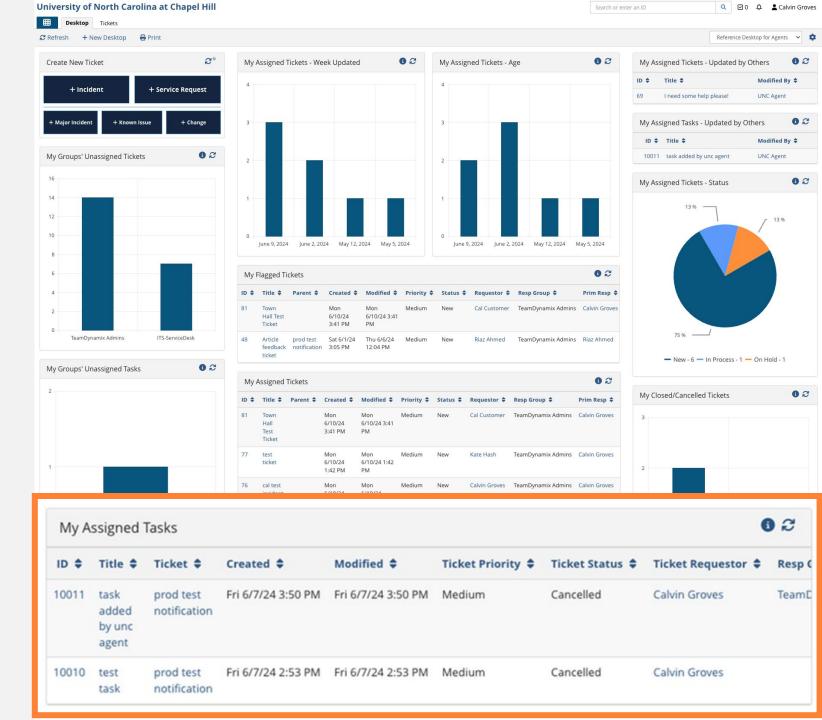
Agent Desktop: My Assigned Tickets



Agent Desktop: My Assigned Tasks

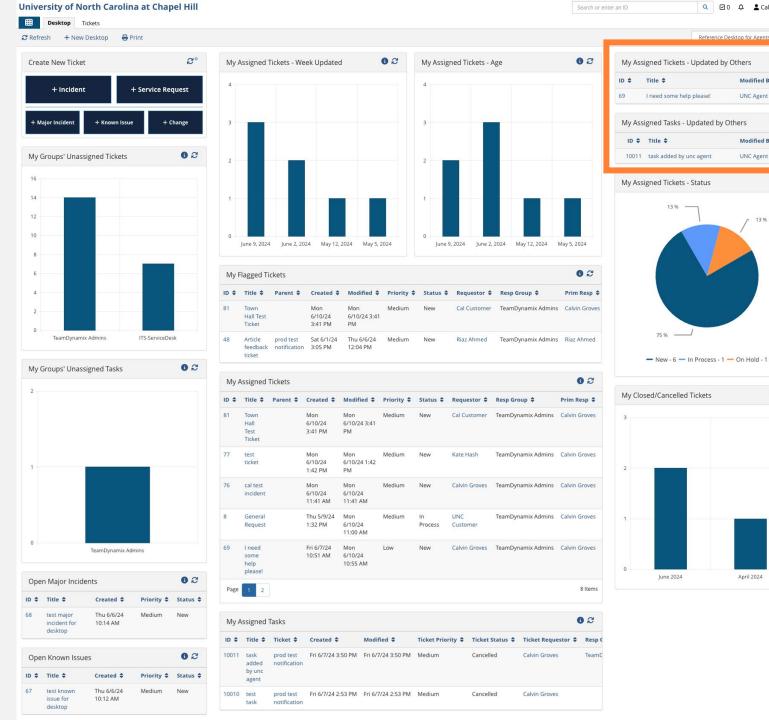


Agent Desktop: My Assigned Tasks



Agent Desktop: My Assigned Tickets & Tasks –

Updated by Others



Q 🗹 0 🗘 🚨 Calvin Groves

Reference Desktop for Agents 🗸 🏚

Modified By \$

Modified By ≜

13 %

June 2024

02

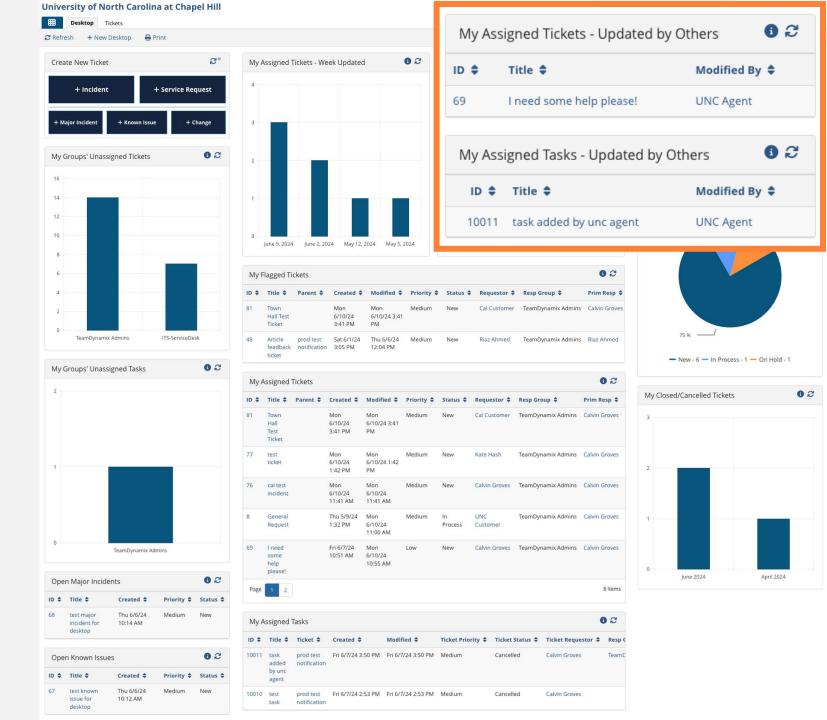
02

02

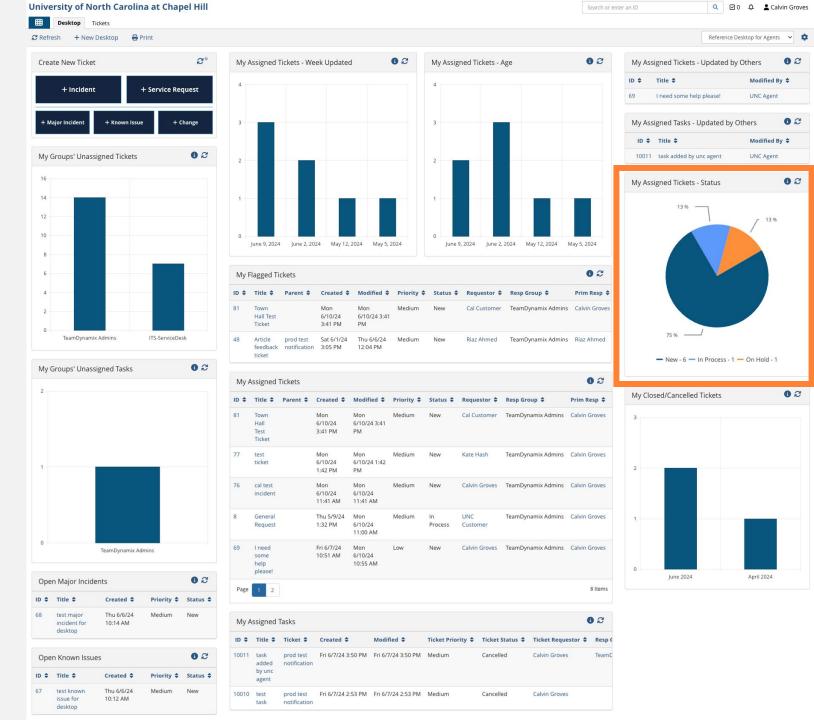
April 2024

Agent Desktop:

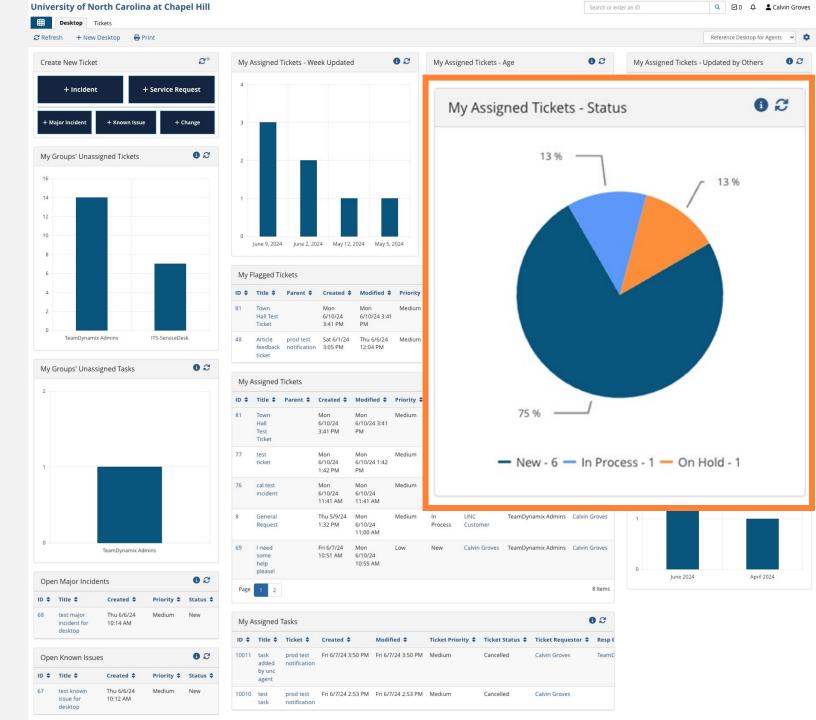
My Assigned
Tickets & Tasks –
Updated by
Others



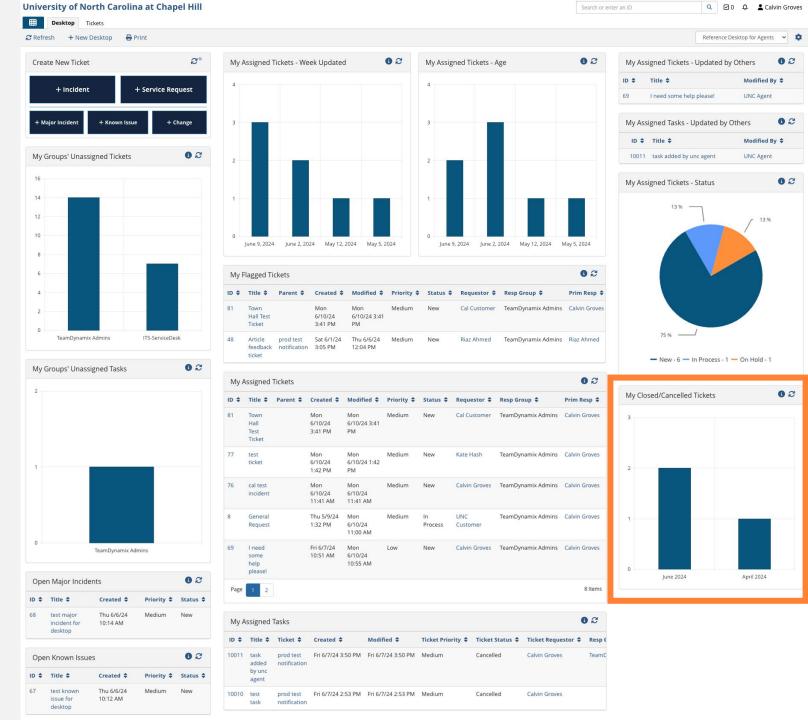
Agent Desktop: My Assigned Tickets – Status



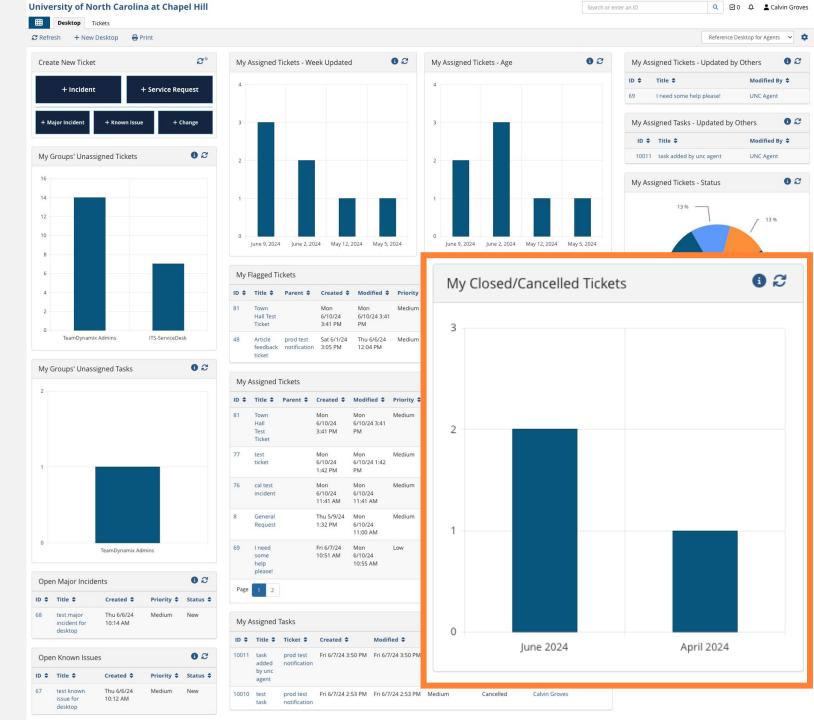
Agent Desktop: My Assigned Tickets – Status



Agent Desktop: My Closed & Cancelled Tickets

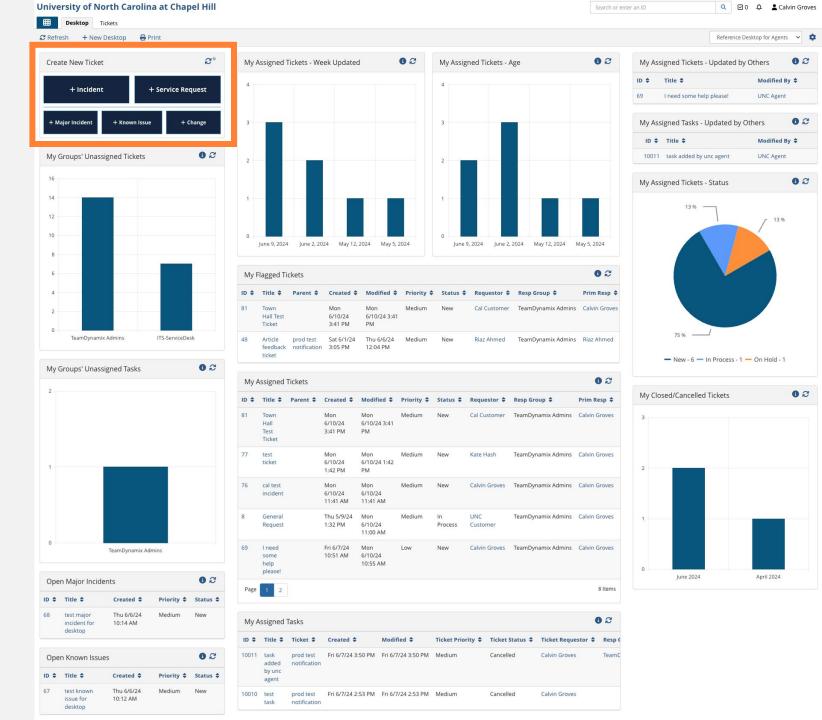


Agent Desktop: My Closed & Cancelled Tickets

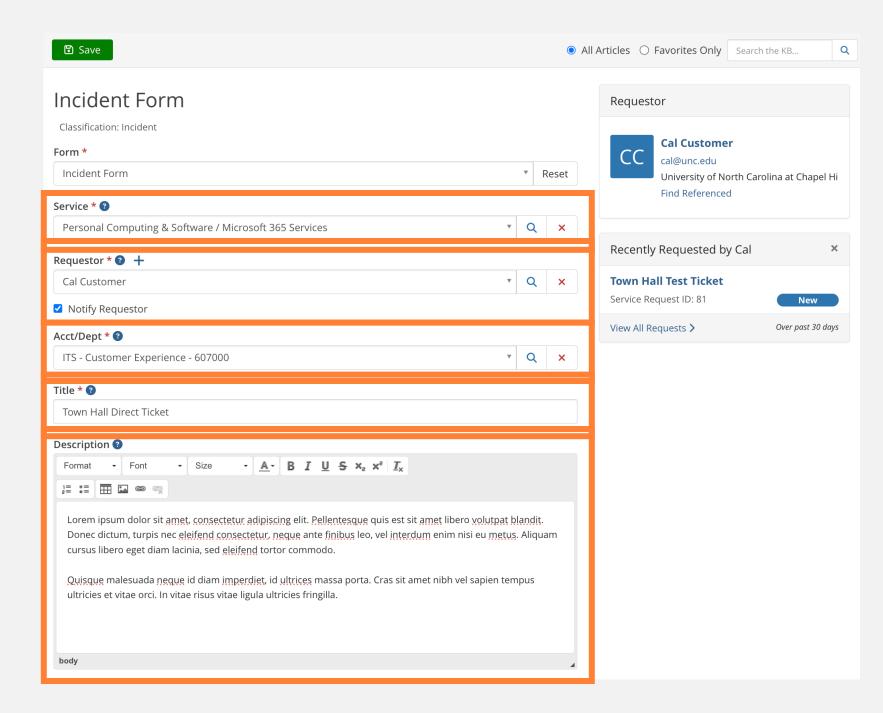


CREATE A DIRECT TICKET

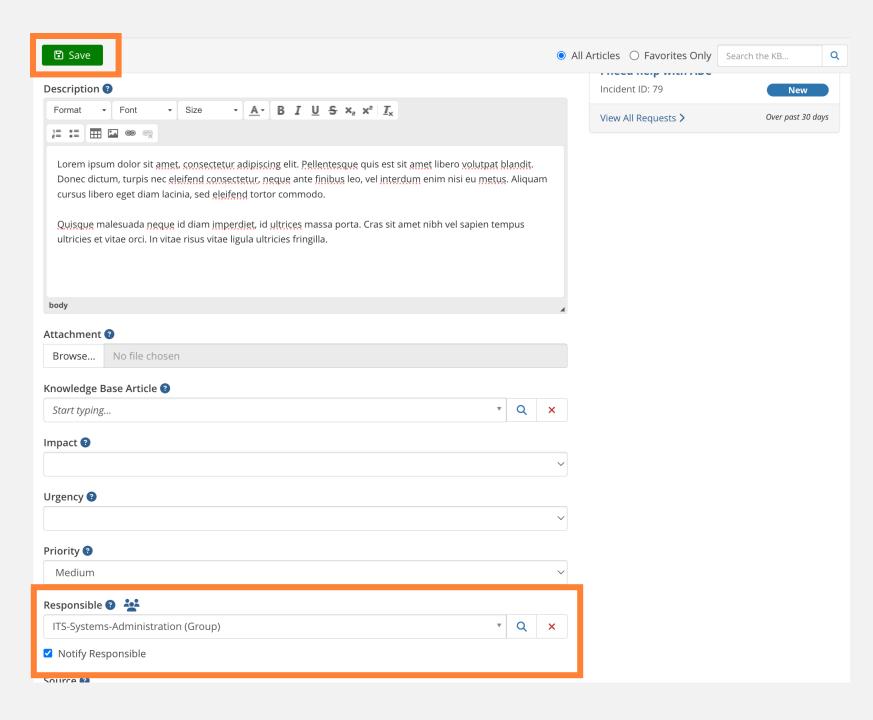
Create Direct Ticket



Create Direct Ticket



Create Direct Ticket



EMAIL NOTIFICATIONS

Email Notification: Customer



External UNC Help: Ticket 81 Created (Town Hall Test Ticket)



○ Calvin Groves <notify@teamdynamixapp.com>

To: Oroves, Calvin



Your ticket "Town Hall Test Ticket" was created on Mon 6/10/24 3:41 PM Eastern Daylight Time.

Ticket Details

Ticket ID: 81

Title: Town Hall Test Ticket

Status: New

Requested For: Cal Customer Created By: Calvin Groves

Created On: Mon 6/10/24 3:41 PM Eastern Daylight Time

Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec a auctor quam. Sed lobortis justo porta, fringilla ipsum hendrerit, vestibulum risus. Donec vitae vehicula sem. Fusce tempus elementum justo sit amet tincidunt.

[Open ticket 81 in the client portal]

To comment on this item, reply to this email.

----TEAMDYNAMIX DO NOT ALTER OR

REMOVE THIS CODE----POVCAylbrz4aprh2oRULcs+6z8znKjnNKVu KZ0dmorEbJFmhA2wqb0MKqOWSukfp6j78 H7KL94J0NomGa83npPo94wdPjQPeAp7K DdHIOELHiVDfJbvRh1E3mJoue4496okvRYj tFhYT4eE4O8omXx+fYJw43fwwlhPPcQnFt CfkJQLSmb6QFU0nRLl22fSeMB1V52pj20P 2+xnZnpAS+dFOyPZup8p9Njvkle0yzII/loWt XQxJF0uhOHMGlLFe3MZJqACLWhwCLWH

tnVXo13mmQ/ltlWsNwtKF9lLjoF9+2W1Zf2B ----TEAMDYNAMIX DO NOT ALTER OR REMOVE THIS CODE----

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Email Notification: Agent



External UNC Help: Incident 81 Created (Town Hall Test Ticket)



O Calvin Groves <notify@teamdynamixapp.com>



To: Groves, Calvin



THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

Calvin Groves created incident 81 (Town Hall Test Ticket) on Mon 6/10/24 3:41 PM Eastern Daylight Time.

Notified: Cal Customer <cal@unc.edu>, Calvin Groves <cbgroves@unc.edu>

TDNext: Open incident 81 in TDNext

Mobile App: Open incident 81 in Mobile App

TDClient: Open incident 81 in TDClient

Incident Details

Incident ID: 81

Title: Town Hall Test Ticket

Status: New

Requested For: Cal Customer Created By: Calvin Groves

Created On: Mon 6/10/24 3:41 PM Eastern Daylight Time

Primary Responsible: Calvin Groves Responsible Group: TeamDynamix Admins

Priority: Medium

Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec a auctor quam. Sed lobortis justo porta, fringilla ipsum hendrerit, vestibulum risus. Donec vitae vehicula sem. Fusce tempus elementum justo sit amet tincidunt.

To comment on this item, reply to this email.

----TEAMDYNAMIX DO NOT ALTER OR REMOVE THIS CODE----

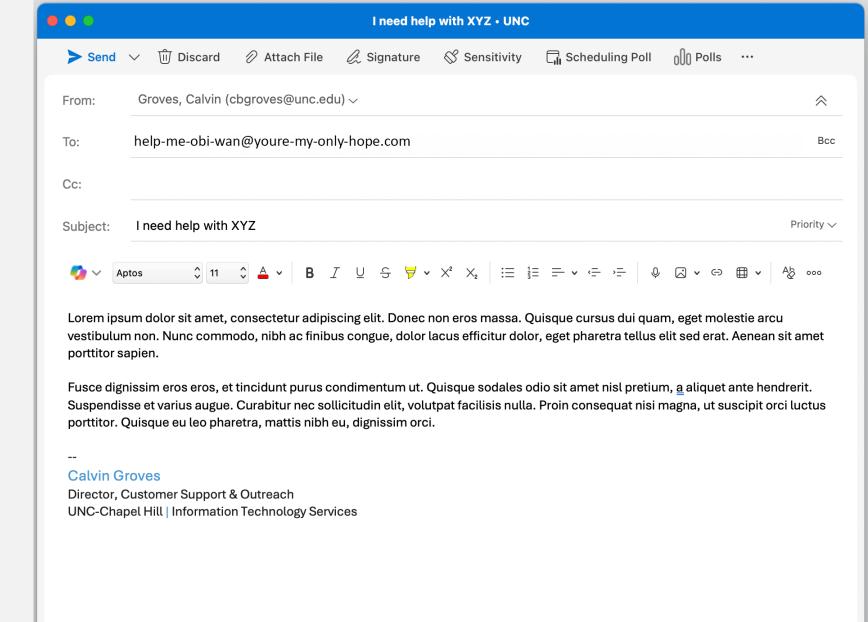
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EMAIL-IN



Email-In



Draft saved just now

New



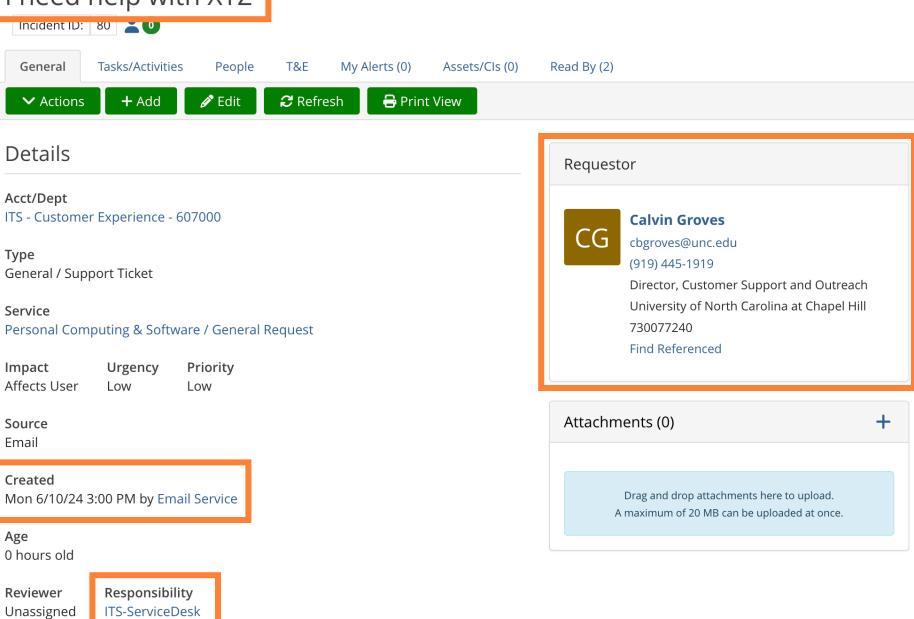
Estimated Hours

0.00

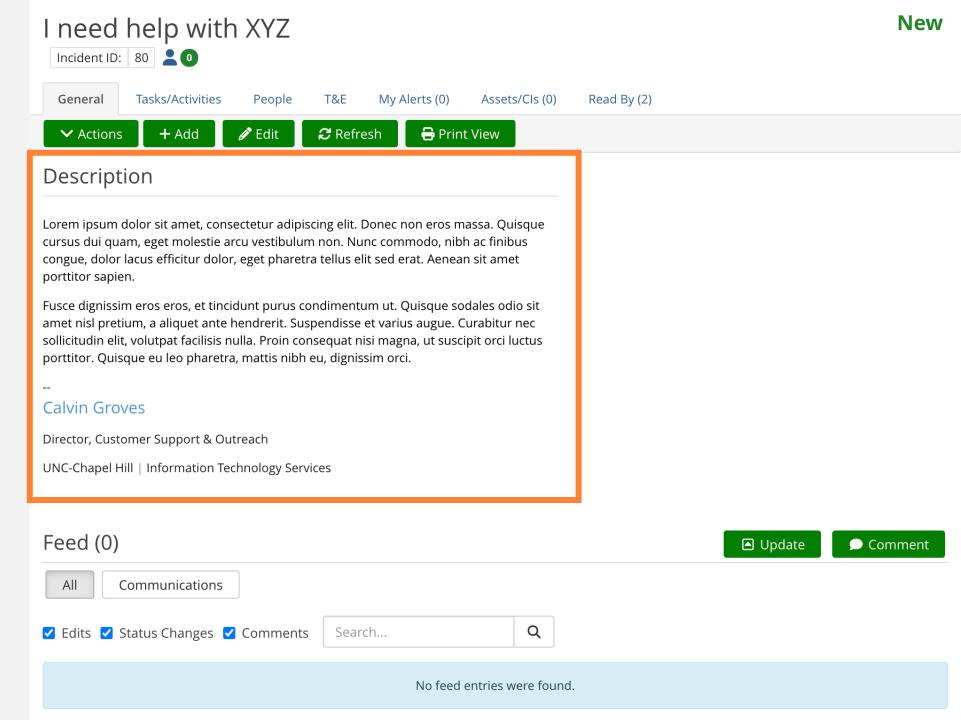
Actual Hours

0.00

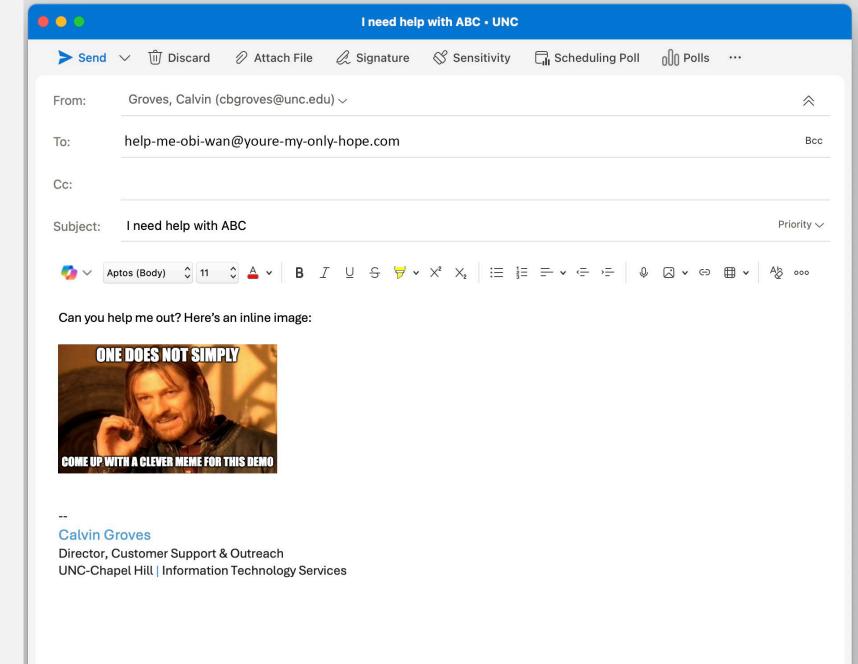
Email-In



Email-In



Email-In



Draft saved just now

need help with ABC

New

Incident ID: | /9 | 👗 🕛

General

Tasks/Activities

People

My Alerts (0)

Assets/Cls (0)

Read By (2)

∨ Actions

+ Add

Edit

2 Refresh

T&E

🖶 Print View

Email-In

Details

Acct/Dept

ITS - Customer Experience - 607000

Type

General / Support Ticket

Service

Personal Computing & Software / General Request

Impact Urgency Priority Affects User Low Low

Source

Email

Created

Mon 6/10/24 2:43 PM by Email Service

Last Modified

Mon 6/10/24 2:43 PM by Email Service

Age

0 hours old

Reviewer Unassigned

Responsibility ITS-ServiceDesk Requestor



Calvin Groves

cbgroves@unc.edu

(919) 445-1919

Director, Customer Support and Outreach

University of North Carolina at Chapel Hill

730077240

Find Referenced

Attachments (1)

Sort By: Name **Date** +



image.png



View





Drag and drop attachments here to upload. A maximum of 20 MB can be uploaded at once.

I need help with ABC

Incident ID: 79

General

Tasks/Activities

People T&E My Alerts (0)

Assets/Cls (0)

Read By (2)

∨ Actions

+ Add





🖶 Print View

Email-In

Details

Acct/Dept

ITS - Customer Experience - 607000

Type

General / Support Ticket

Service

Personal Computing & Software / General Request

Impact Urgency Priority Affects User Low Low

Source

Email

Created

Mon 6/10/24 2:43 PM by Email Service

Last Modified

Mon 6/10/24 2:43 PM by Email Service

Age

0 hours old

Responsibility Reviewer Unassigned ITS-ServiceDesk

Requestor



Calvin Groves

cbgroves@unc.edu

(919) 445-1919

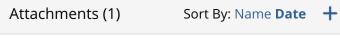
Director, Customer Support and Outreach

New

University of North Carolina at Chapel Hill

730077240

Find Referenced





Mon 6/10/24 2:43 PM Email Service

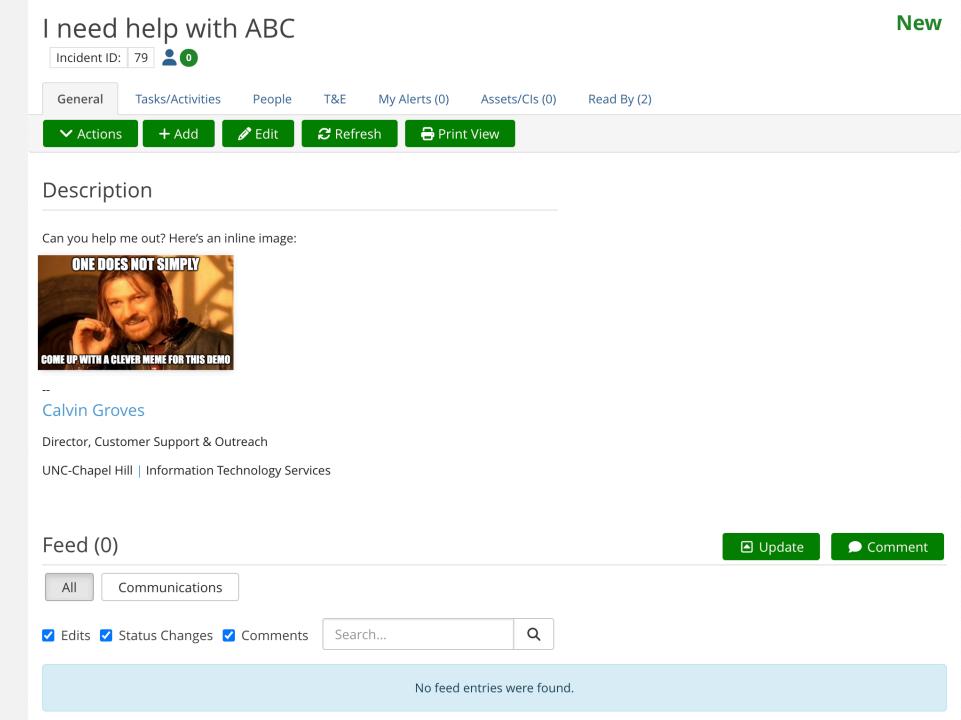




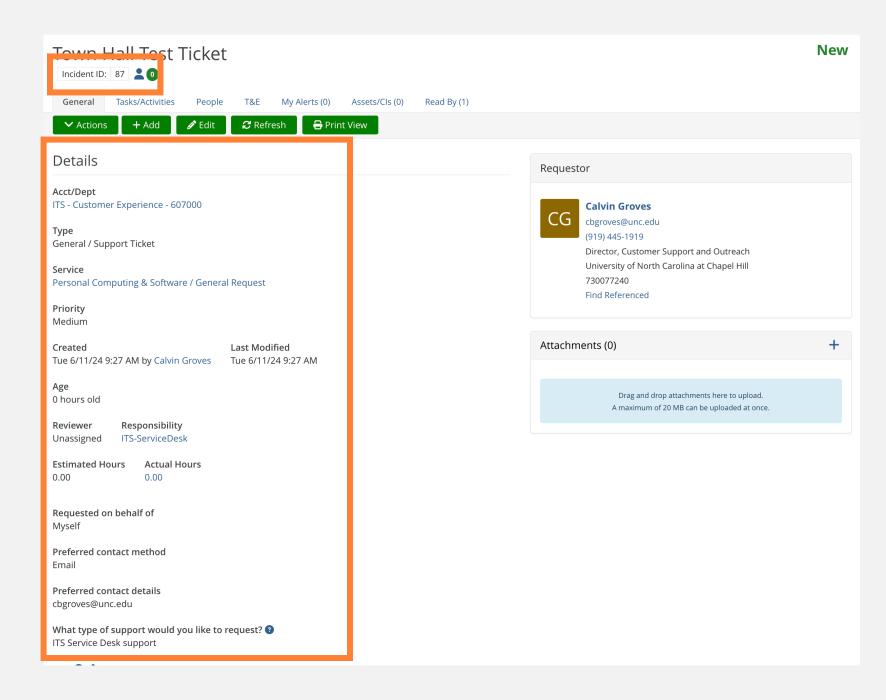


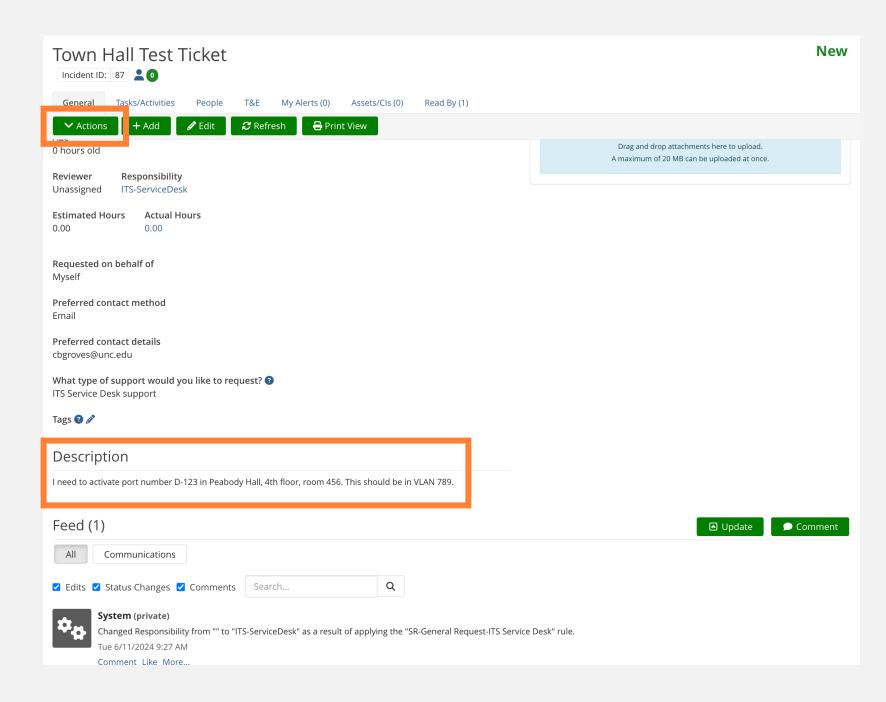
Drag and drop attachments here to upload. A maximum of 20 MB can be uploaded at once.

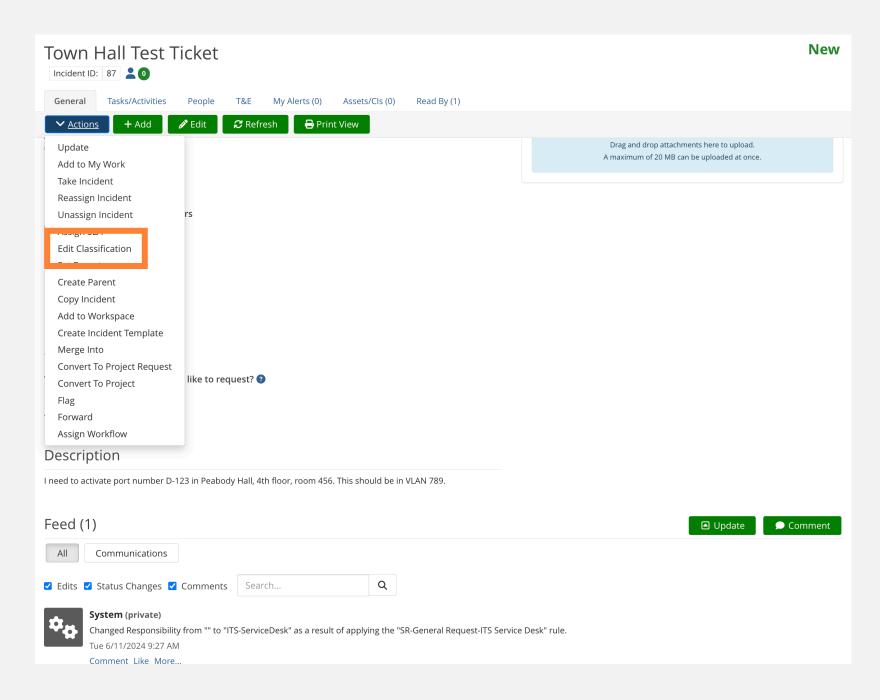


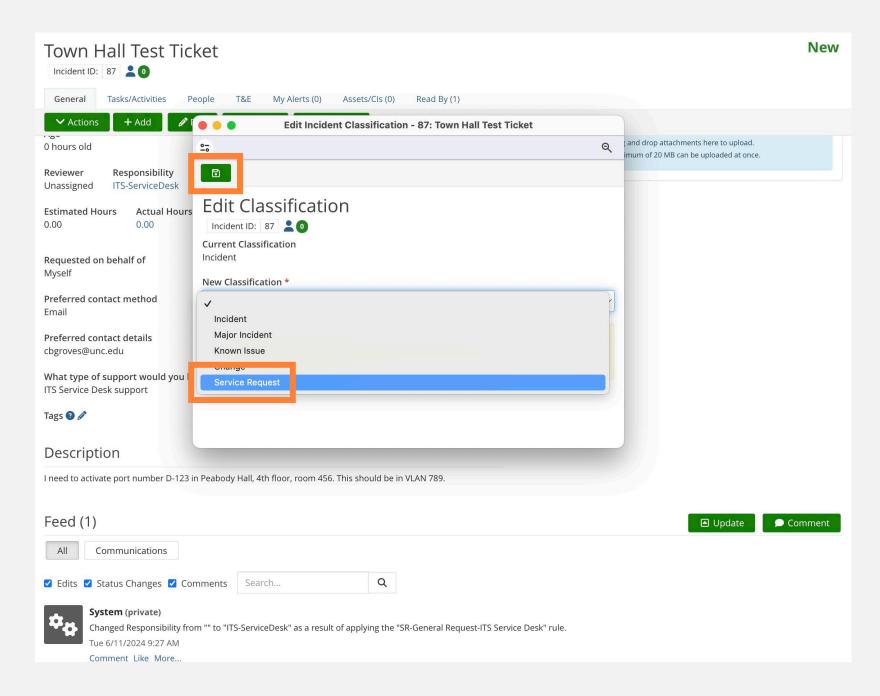


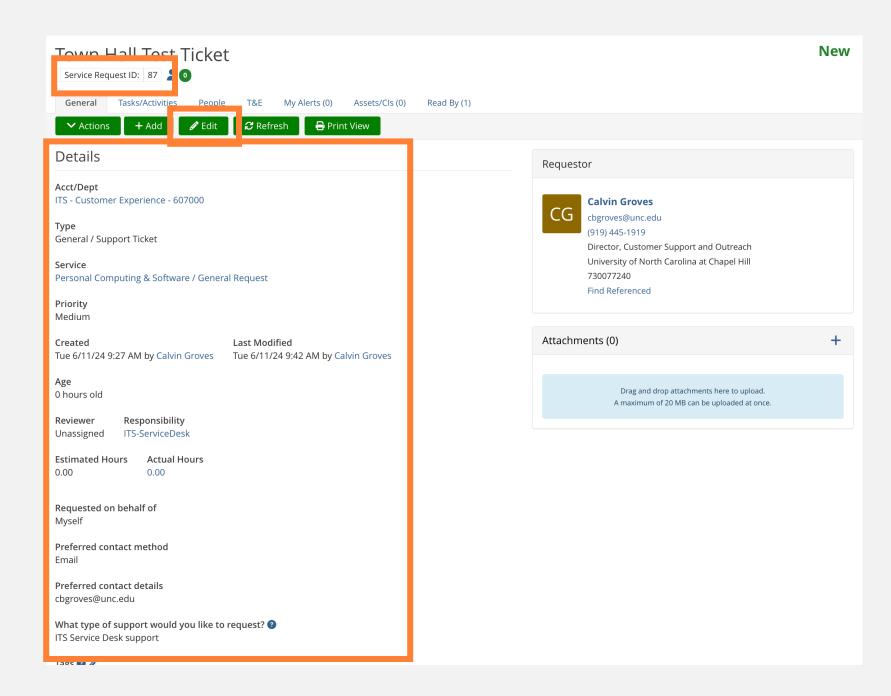
CONVERTING AN INCIDENT TO A SERVICE REQUEST

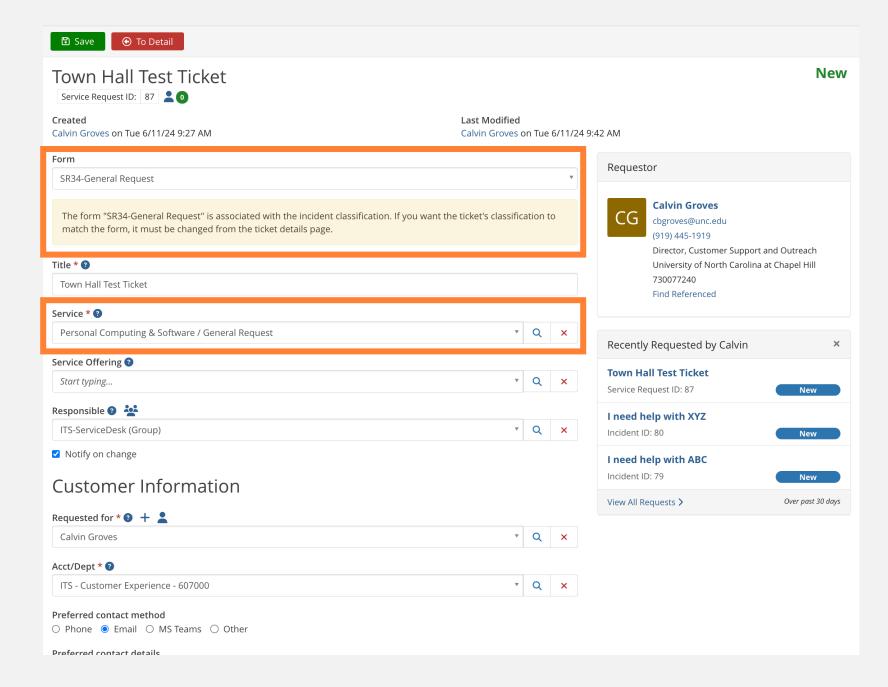


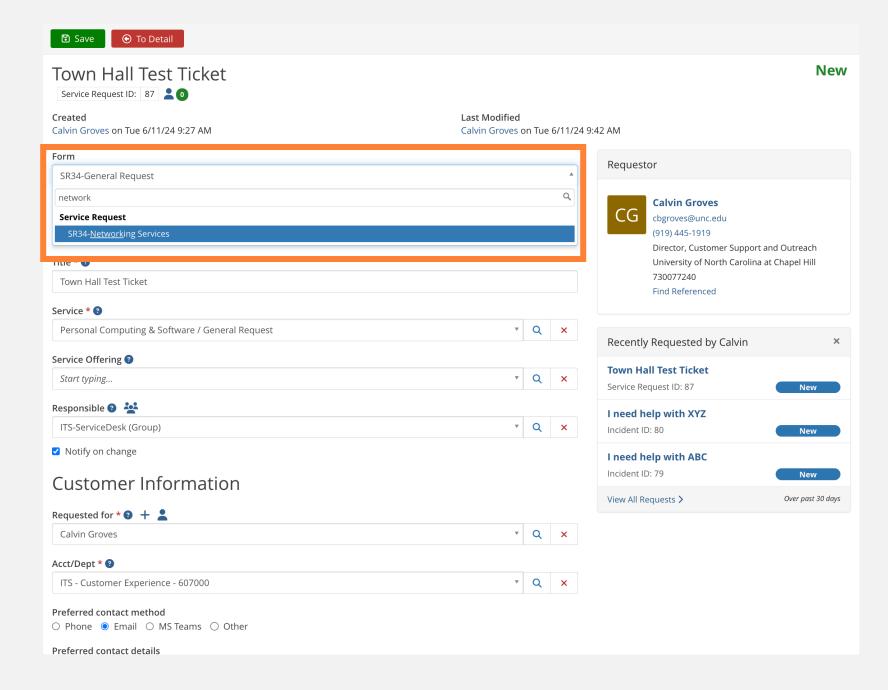


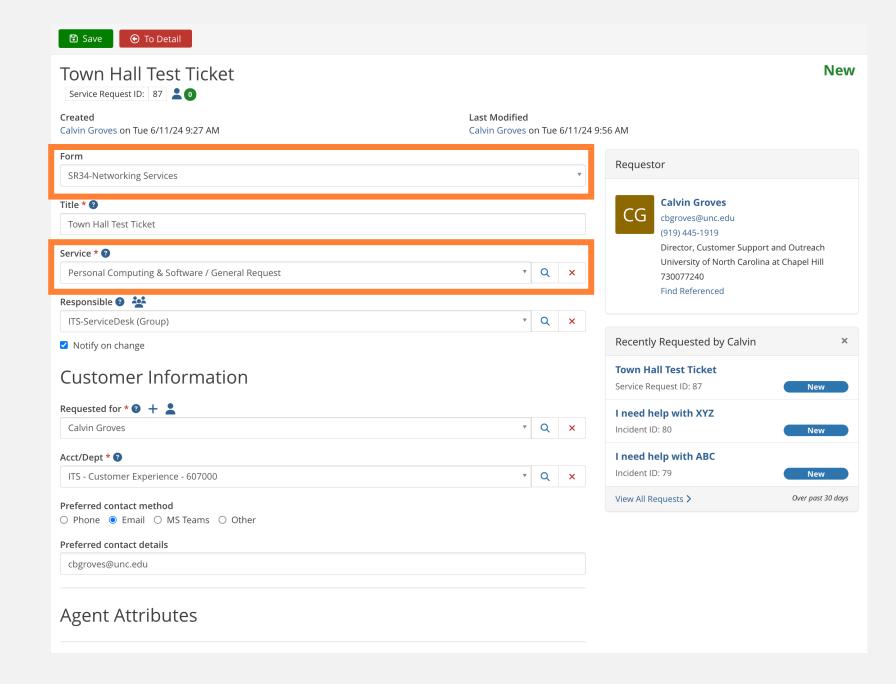


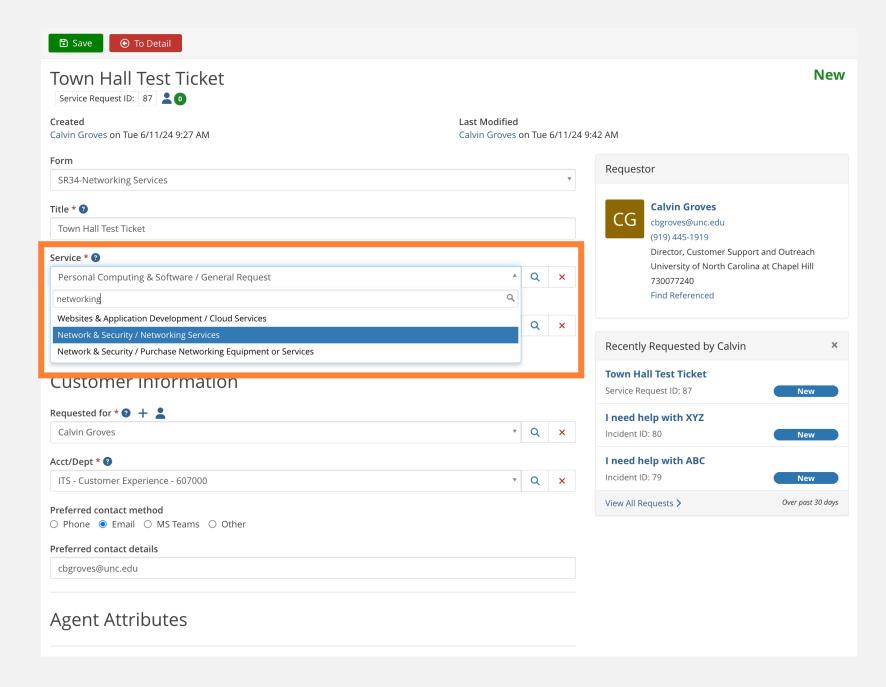


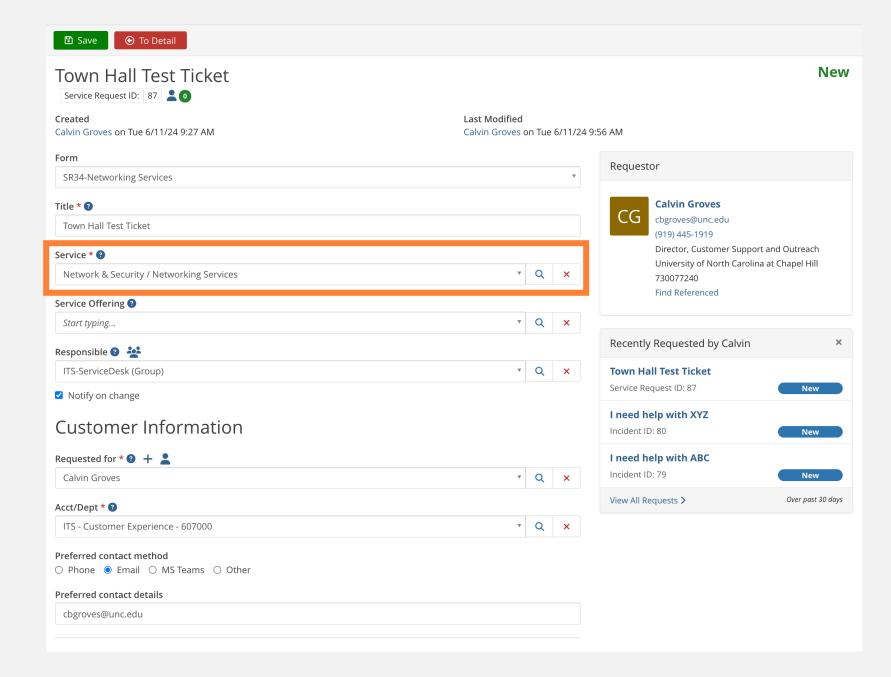


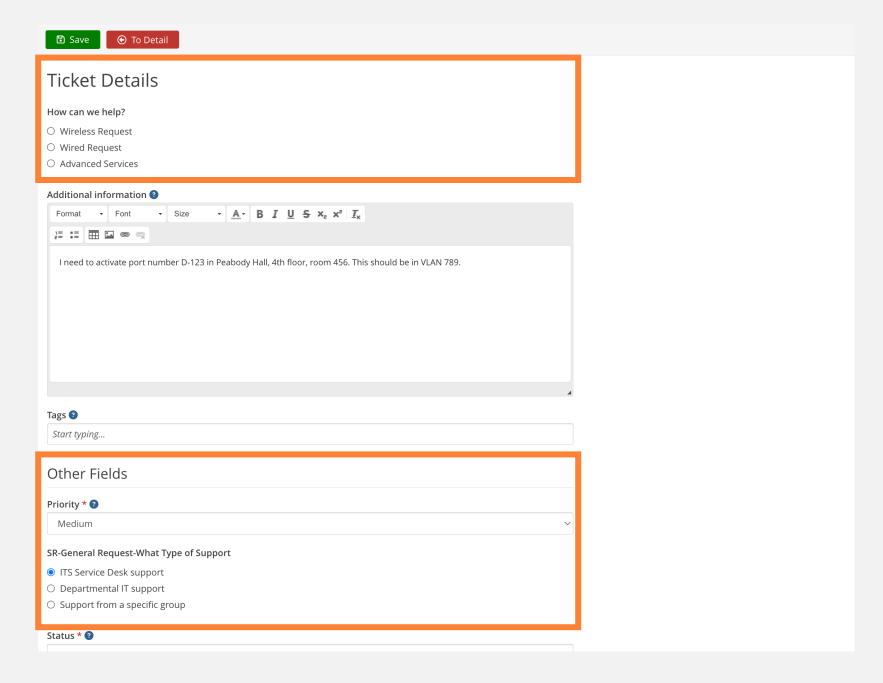


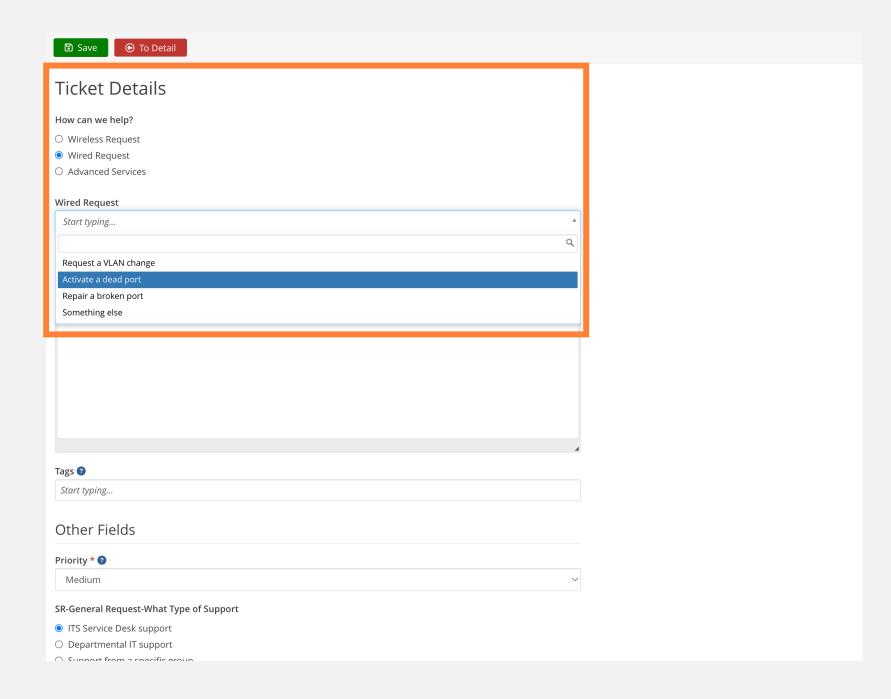


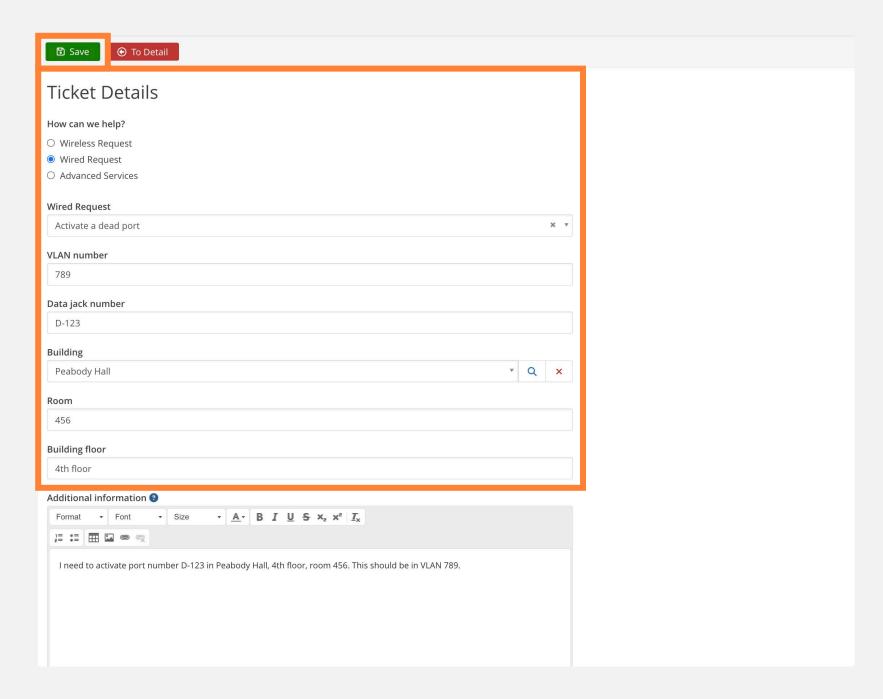


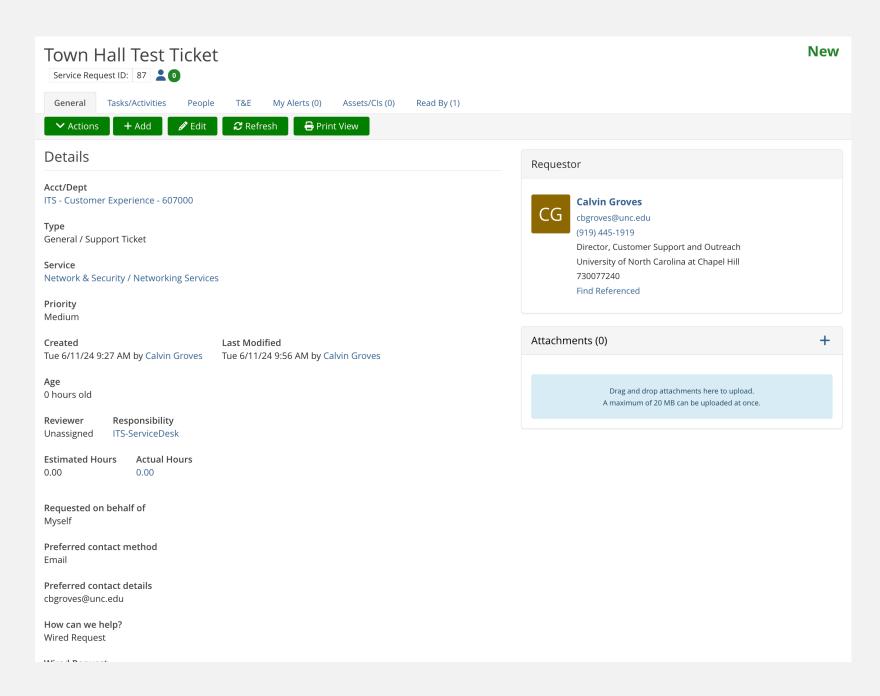


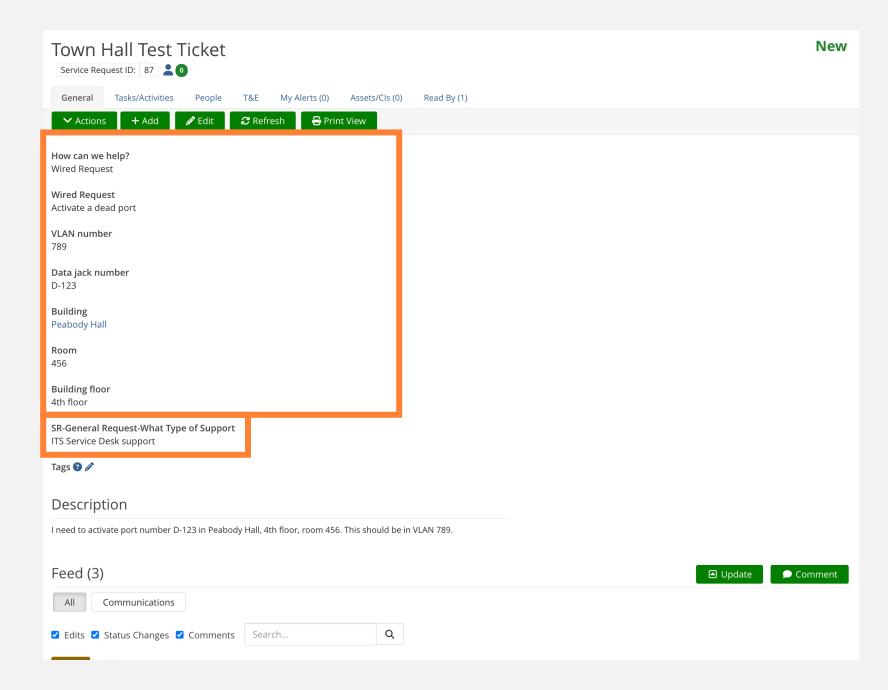


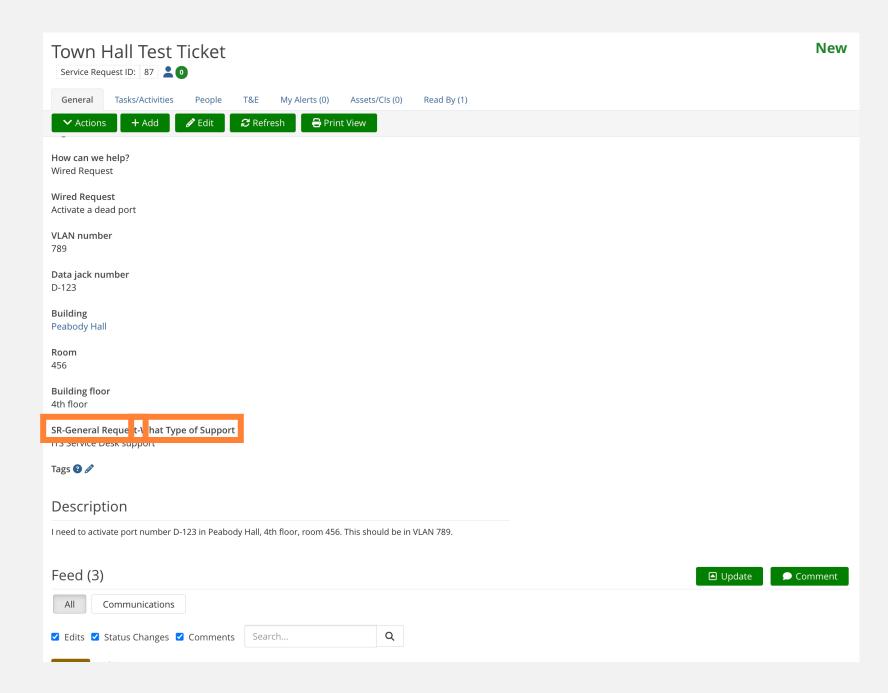


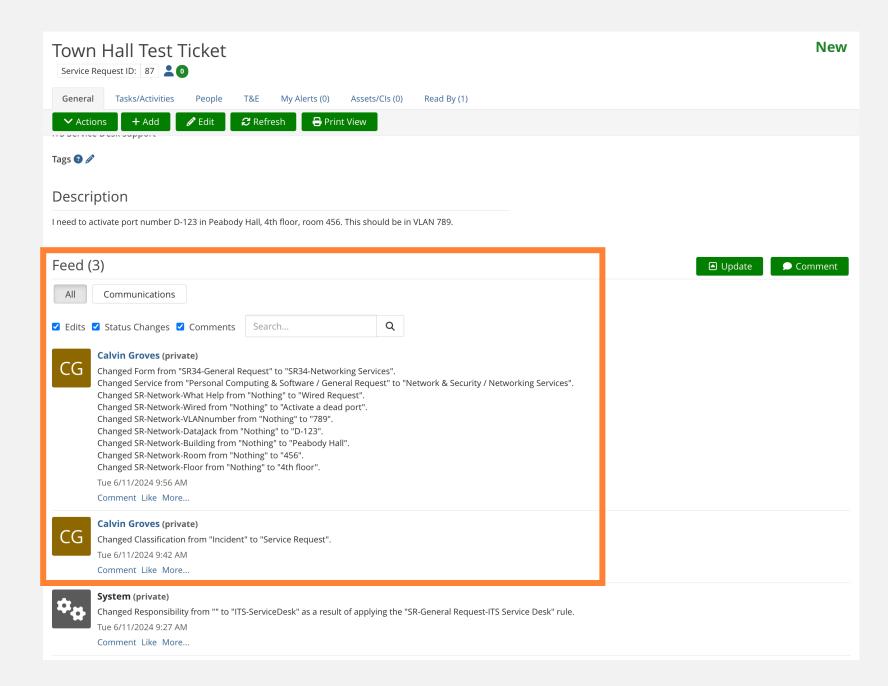






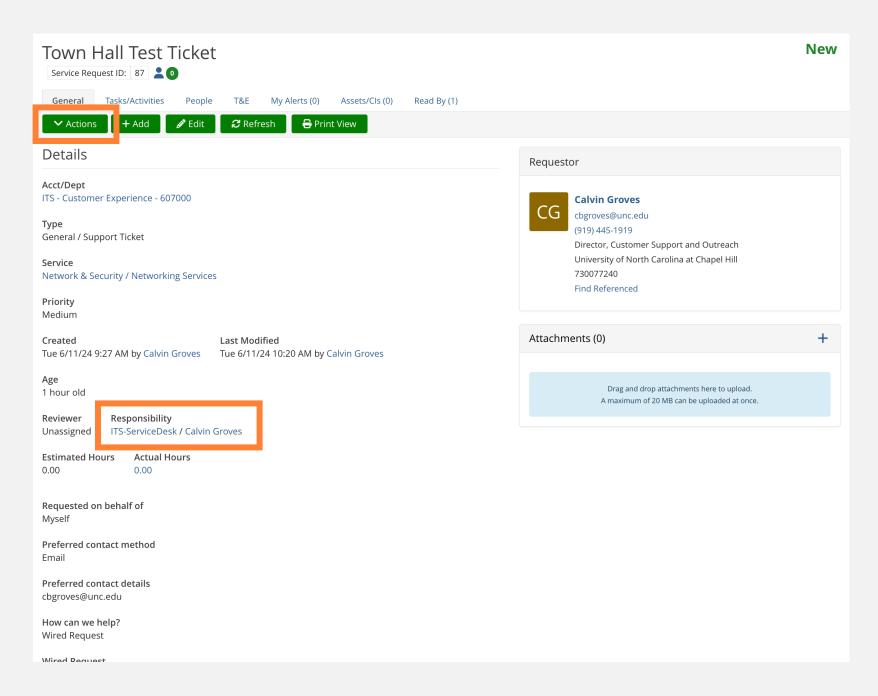


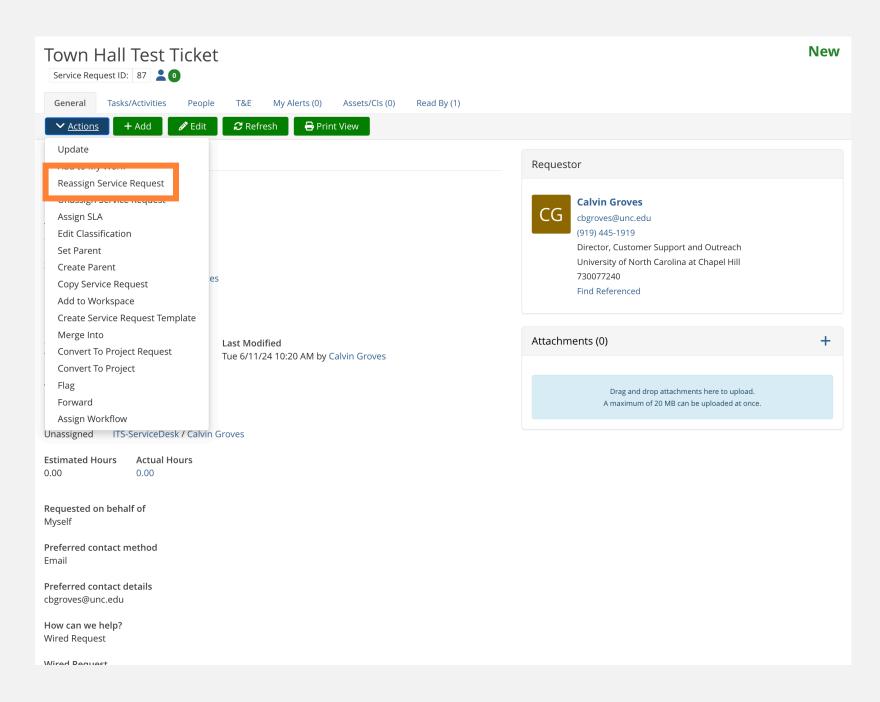




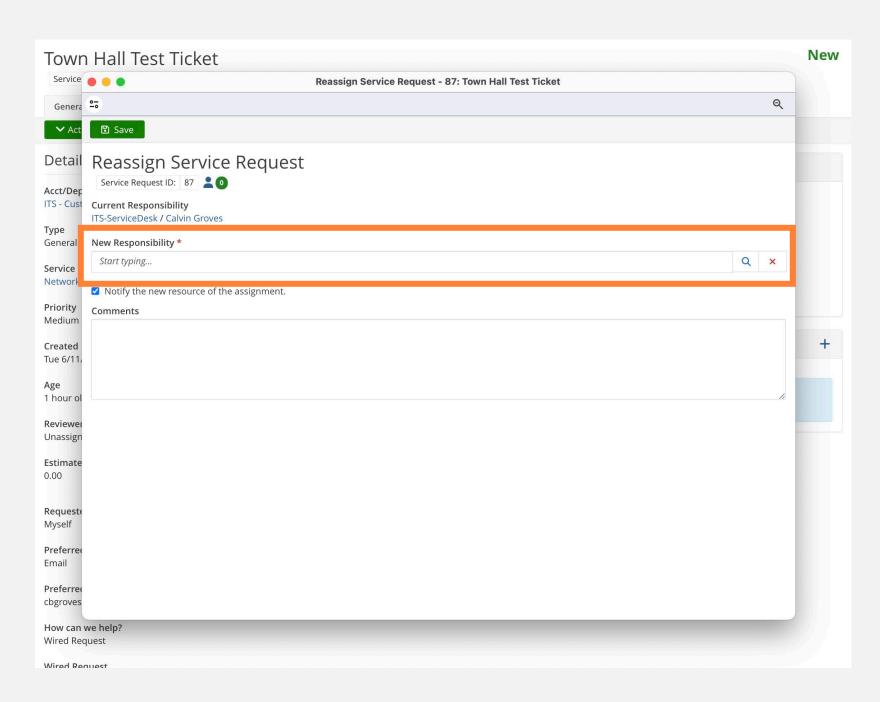
RESPONSIBLE GROUPS

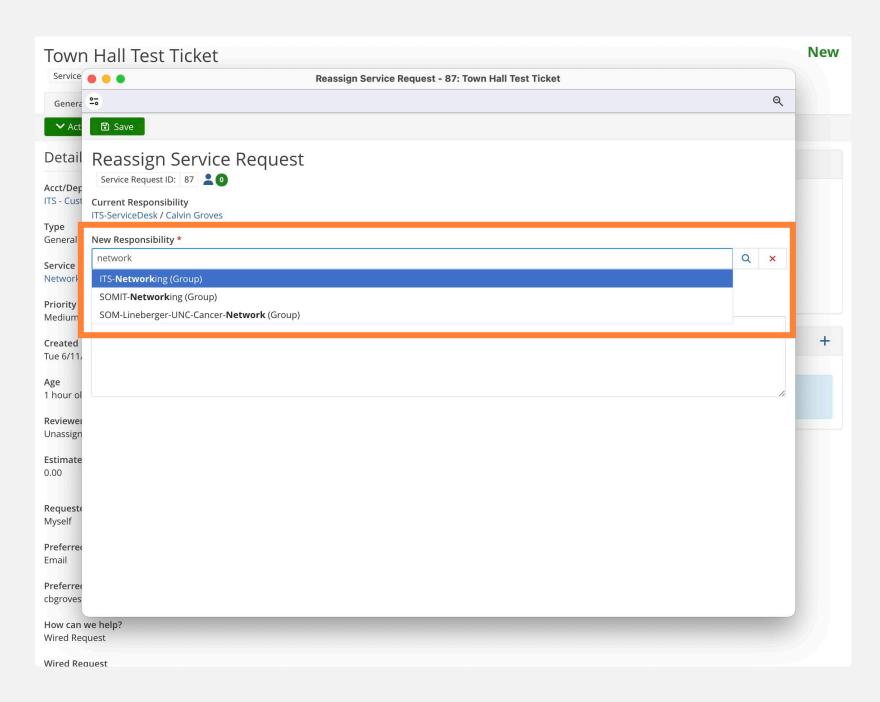


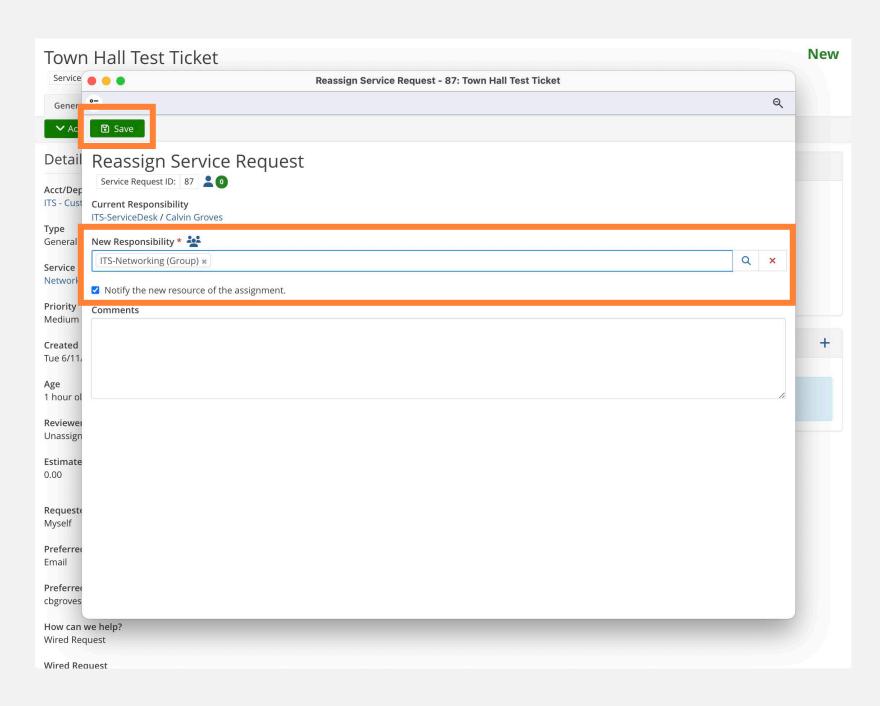


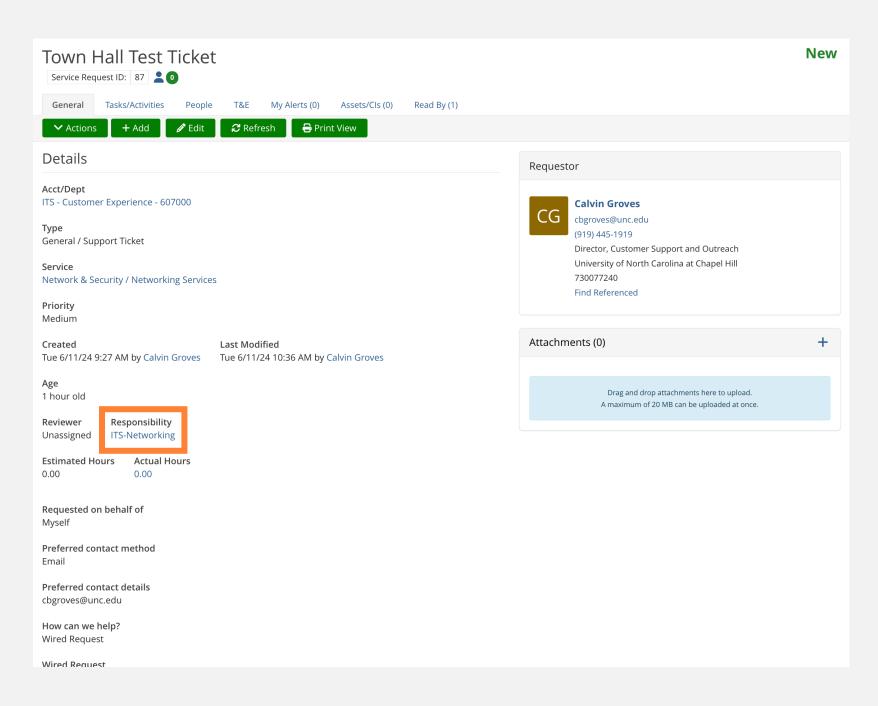














TEAMDYNAMIX EARLY ACCESS

TDX Early Access

- Early Access for AGENTS begins 6/24
- Early access is **not** for customers
- Everything will **not** be complete for early access we are working to the go-live date (7/10)

TDX Early Access – Agent Responsibilities

- If creating tickets, only use yourself as the requestor/requested for
 - Do not open tickets for customers
 - Notifications will go out
- Do not send tickets to other groups
 - Only create tickets for yourself
 - There is no expectation to work tickets in TDX until 7/10

People who do not adhere will have their early access revoked

TDX Early Access

Test your services/tickets!

- Test what the user sees before and after submission on TDClient (client portal)
- Test the ticket in TDNext (agent back-end)
- Corrections (not additions) should be sent to: TeamDynamix@unc.edu



TRAINING DETAILS

Training Details

- Agent (Level 1) Training begins next week
 - Sessions on Tuesday and Thursday
 - Registration is required
- Be sure you complete the TDX eLearning courses before attending Level 1
 Training
 - Using TD Next
 - Ticket Anatomy
 - Common Ticket Activities
 - Explaining the Actions Button in a Ticket
- Training will be lecture style, with time for Q&A

Training Details

- "Super" Agent (Level 2) Training is for anyone who will work tickets on a daily, or almost daily, basis
 - Two sessions Tuesday, June 25 and Thursday, June 27
 - Pre-requisite: Level 1 Agent Training
- Change Management CAB Workflow Workshop is for anyone who submits changes to a Change Advisory Board (CAB)
 - One session Wednesday, June 26
 - Pre-requisite: Level 1 Agent Training
- Reporting and Dashboards Workshop is for anyone who will prepare reports (including dashboards in TDX)
 - One session Wednesday, June 26
 - Pre-requisite: Level 1 Agent Training

Early Access Office Hours

Week of June 24

- Monday, Wednesday 1:00pm 2:00pm
- Tuesday, Thursday 10:00am 11:00am

Week of July 1

- Monday, Wednesday 10:00am 11:00am
- Tuesday 1:00pm 2:00pm

Sessions will not be recorded.



HOW WE'RE COMMUNICATING

Communications

For faculty, staff, and students:

- Minimal impact
- Formal notice email
- Announcing the change
- Timing: A couple days before

For HR, Finance, and IT staff:

- Slightly larger impact
- Emails to HR Officers, Campus Unit Finance Leads, ITEC
- Requesting help spreading the word, specific information about their areas
- Timing: Within a week from now

For Agents

- We will continue sending emails and posting them to the website: <u>tarheels.live/customersupporttool</u>
- Go-live Town Hall webinar
 - Tuesday, July 9 at 3:00pm
 - Check the **Events Calendar** for the Zoom link



Q&A



