



**University of
New Hampshire**

TeamDynamix: Knowledge Base

Version 11.3

UNH Training Reference Manual

*Provided by the Project Management Office

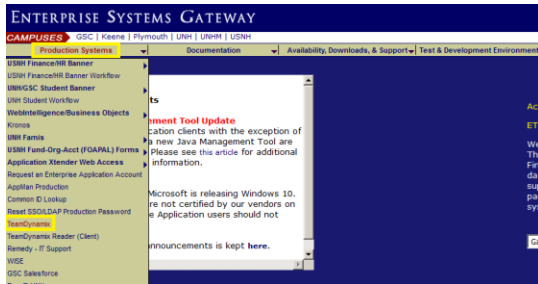
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How to Access TeamDynamix

Login to TeamDynamix – Production System:

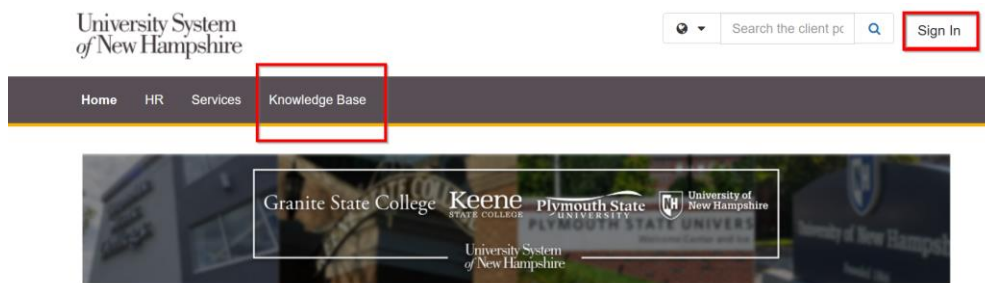
1. Visit usnhgateway.org
2. Click on **Production Systems**
3. Click on **TeamDynamix**



NOTE: Chrome is the recommended browser.

How to Access TDx Knowledge Base

1. Navigate to: <https://td.unh.edu/TDClient/home/>
2. Click on **Sign In** top-right of the screen and authenticate with your USNH credentials. *This will ensure you have access to see all the articles that have been published to you. Once you have authenticated, your name will appear in the top-right corner of the screen.*
3. In the brown navigation bar across the top of the screen, select **Knowledge Base**.



Welcome to the USNH TeamDynamix Client Portal

Note: If you are already working in TDNext, you can also go to the Applications menu (waffle) button in the upper left-hand corner of TDNext, and select Client Portal to navigate to the Knowledge Base.

How to Create an Article

To be able to write a Knowledge Base article, you must have a +KB security role. If you don't have access to create New Articles, ask your manager to request a security role change via accounts.unh.edu.

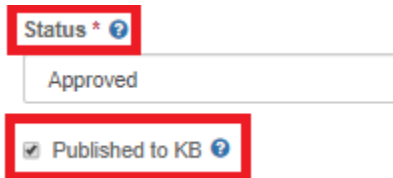
1. Access the TDx **Knowledge Base**.
2. Click on the appropriate Category for your group. *Note: All articles are required to be in a category.*
3. Click on green + **New Article** button that is displayed on all main Knowledge Base pages.
4. Fill out fields and **Save**.

Note: Only certain HTML content is allowed. While editing your article, some images and videos may look correct, but will not appear in the finished version viewable to end users. Be sure to review the finished version of the article to ensure all your content has posted before publishing. For the list of allowed HTML content see:

<https://solutions.teamdynamix.com/TDClient/KB/ArticleDet?ID=48230>

How to Publish an Article

1. While creating a new article, go to the **Status** field and choose **Approved** from dropdown.
2. Check off the **Published to KB** box located underneath the **Status** field.



The image shows a screenshot of a web form. At the top, there is a dropdown menu labeled "Status *" with a help icon. The dropdown is open, and the option "Approved" is selected. Below the dropdown, there is a checkbox labeled "Published to KB" with a help icon. The checkbox is checked, and the entire "Published to KB" section is highlighted with a red rectangular box.

Requesting a New Category or Category Modification

If you require a new category, or modification to an existing category, submit a request at <https://td.unh.edu/TDClient/Requests/ServiceDet?ID=120>.

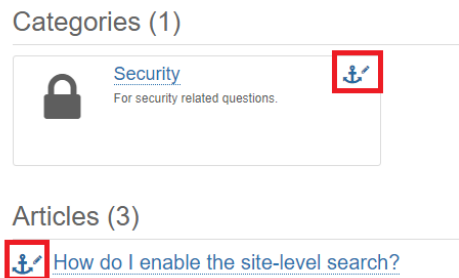
Adding Shortcuts

Articles “live” in a single category, however you can add shortcuts to reference an article/category from another location in the Knowledge Base.

1. Navigate to a client portal category in the Knowledge Base where you want to include a related category or article. Shortcuts can also be created from the root of the KB.
2. Click the **+New Shortcut** button in the top right. The **New Knowledge Base Shortcut** window opens.
3. Choose the **Shortcut Type** (Category or Article).
4. In the Target field, choose the category or article that you want to link to.
5. The Parent Category field will default to the category you were in, or blank if you were at the root of the Knowledge Base. You can change it if you want.
6. Set the order and optionally pin the shortcut. The order is evaluated for the category that the shortcut resides in.
7. Click **Save**.

Editing/Deleting Shortcuts

Edit or delete a Shortcut by clicking the shortcut icon (an anchor) when viewing it in its parent category.



This will open the **Edit Shortcut** page, where the shortcut can be edited or deleted.

The screenshot shows the "Edit Shortcut" page. At the top right is a red "Delete Shortcut" button. The page displays the following fields:

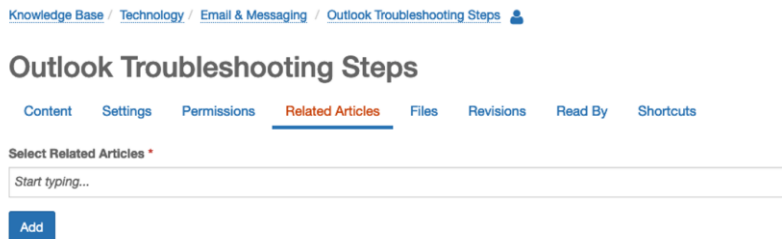
- ID: 2
- Shortcut Type: Category Article
- Target: with search and delete icons.
- Parent Category: with search and delete icons.
- Order: Pin Shortcut

A blue "Save" button is located at the bottom left of the form.

How to Relate an Article to Other Articles

Two or more articles can be associated with one another by adding a relationship. When viewing an article, all Related Articles will appear along the right side of the article screen in a section titled **Related Articles** beneath the article's **Details** panel. To relate articles to one another:

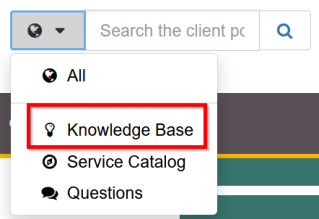
1. Access an article which you'd like to link with another article.
2. Select the **Edit Article** button.
3. Click on the **Related Articles** tab.
4. Search via the type-ahead lookup or the magnifying glass lookup option to locate the desired article.
5. Once you've selected an article, click the Add button.
6. Repeat steps 4 and 5 until you've associated all desired articles with the article you are editing currently.



How to Search for an Article

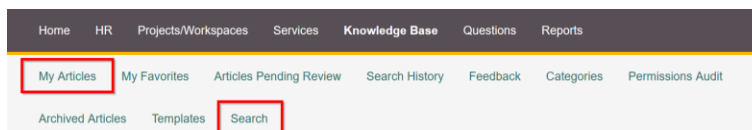
Using the Global Search Filters

Using the global search in the top-right of the Client Portal, click on the globe icon to the left of the search box and limit your search results to items in the Knowledge Base.



Searching From the Knowledge Base Application

1. Click on either **My Articles** or **Search** from top navigator bar to bring up Search window:



2. Fill out the Search field(s) criteria and select orange **Search** button.

How to Update an Article

1. Click on **My Articles** on top navigator bar.
2. Use **Search** criteria to locate article.
3. Open the article and click on green **Edit Article** button.
4. Update article and click **Save**.

Editing Article Settings such as Category, Tags, and Owner

1. Navigate to the article.
2. Select the **Edit Article** button.
3. Click on the **Settings** tab.
4. Here you may adjust the Category, the Order in which the article appears within its category, change Tags, Status, Review Date, and Owner.

Note: The Owner can also be assigned to a Group to allow direct feedback to the group and permissions to let all group members edit articles.

How to Remove an Article

Articles can either be unpublished or archived.

How to Unpublish an Article

1. Open article and click on green **Edit Article** button.
2. Click on **Settings** tab in top navigator.
3. Uncheck **Published to KB** box and click **Save**.
4. Under the green **Edit Article** button in the **Details** area, "**Published**" will display as **No**.



How to Archive an Article

1. Open article and click on green **Edit Article** button.
2. Click on **Settings** tab in top navigator.
3. Go to the **Status** field and choose **Archived** from dropdown.
4. Select **Save**.

TeamDynamix Support

Join the TeamDynamix Community

<https://community.teamdynamix.com/>

Register for UNH TeamDynamix Classes

<https://ittraining.unh.edu/apps/ssr>

Search the UNH IT TeamDynamix Knowledge Base

<https://td.unh.edu/TDClient/KB/?CategoryID=130>

Submit a UNH TeamDynamix Support Form

<https://td.unh.edu/TDClient/Requests/ServiceDet?ID=120>