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Purpose
This training material highlights the new ticket system. You will learn how to manage, create, and understand the AskTom knowledge base in BMC Remedyforce.

Audience
This training material is designed for University staff that will be utilizing the AskTom knowledge base in BMC Remedyforce.
Using the AskTom Knowledge Base

AskTom is now part of the BMC Remedyforce Self Service, a browser based incident management system, which enables users to access the system from any computer or mobile device.

*Please note that different fields or sections in the system may require your browser to allow pop-ups from Remedyforce.*

1. Log into the System

- Browse to the [Service Desk Website](#).
- Login with your **UUID** and **password**. *(The UUID and password is the same one you use for myMemphis Portal and all other campus resources.)*
- Once logged in, you will be taken to the **Self-Service** tab.
Viewing AskTom Articles

1. Click on the View AskTom Articles tile, located under the Home tab on the left portion of the screen.
2. Next type your question in the text field located directly under the umService Desk logo. Once you have entered your question or phrase, click Enter or Return on your keyboard.

3. Once you have clicked search, the database will retrieve any Service Requests and AskTom Articles that may pertain to key words in your search. The Service request template that relates to your search will appear in the panel to the right. Note: The selected result will be in black text. Select AskTom Articles.
4. Click on the article you want to view.

5. The **AskTom Article** will appear in a window. You can (A) print the article, (B) Select a rating for the article, (C) state whether the article met your needs by choosing the radial button for Yes or No, (D) Click **Submit** to submit your response.
Asking AskTom a Question

To ask a new question, click on Common Service Requests located to the right side of the Self Service landing page. There will be a list of Common Service Requests and Popular AskTom Articles.

1. Click on AskTom Question from the list in the window.
2. (A) Type your question in the provided field. Select (B) Impact, (C) Urgency, (D) provide Call Back Number, and (E) Add Attachment if you think it is necessary (F) When you have completed asking the question, click Submit.

Once you have submitted your question you will receive this message:

When the question is submitted, it will be added to a service desk ticket and the answer emailed to you.
Submitting a Ticket

1. To begin using chat, click on the AskTom Chat tab located at the bottom right corner of the window.
2. Next, you will see the chat window. Type your question or describe your issue in the text field, then click **Start Chat** to begin a chat session with a member of the service desk representative.

![Chat window example](image)

*Note: If no one is available to chat, you will receive this message:*

![Chat unavailable message](image)
3. Once you have started the chat session, the next window to appear will be a response from a Service Desk representative. If you would like to attach a screen shot of your technical issue, you may do so by clicking on the paperclip icon located at the bottom right-hand of the chat window.

Next, you will be greeted by a service desk representative.
4. Once you are satisfied that the chat session is complete, close the chat window by clicking on the X in the upper right hand corner of the chat window. When you close the chat window— you will get the following window:

If you want to continue with the chat, click No; if you are ready to finish and complete the chat, click Yes. When the chat session closes, your chat transcript will be added to a service desk ticket and emailed to you.
Responding to an AskTom Chat

Only certain users will have the ability to answer questions via AskTom Chat.

1. Log into Remedyforce.

2. Choose the Remedyforce Console tab. By default, you should see the Available tab at the lower right hand side of the window.

3. Your tab will automatically change color to red and read busy when a new question is entered and is directed to you.
4. Once you have answered the chat question and the client is satisfied, you are now ready to close the chat session. Once the session has ended, close chat session. Click on the X in the upper right hand corner of chat window.

5. When you close the chat to end the session you will be prompted to answer if you are ready to end chat session. Click Yes to end Session, click No to continue chat session.
Creating a Knowledge Base Question from a Ticket
To create a knowledge base question from an existing ticket, do the following:

1. Open the ticket in Remedyforce Console

2. Select the Agent Tools tab and choose Create Knowledge Article from the drop down menu.

3. Name your knowledge article by typing the title in the blank text field. Click the Create button.
4. Once the new knowledge article is created it will be placed as a draft in the AskTom Answers Tab.

5. Select the question to edit by clicking on the knowledge base article number.
6. You can change the category, title, add or delete keywords, question, or the answer. Click **Edit** to edit the question (located at the top and bottom portion of article). From here you will edit article information and details.

![AskTom Detail](image)

Article information will tell you who the owner of the question is, what category the question belongs, and the status of the question (Draft, Published, or retired). Article Details contain all the information in the knowledge base article.
A. Category
A. Category describes the section where the article will be housed.
B. Status
B. Status chooses whether the article is a draft, retired or published.
C. Display in Self Service
C. Display in Self Service selects the question to be one of the 6 features articles on main self-service page.
D. Title
D. Title displays the title of the article or the question the article will answer.
E. Question
E. Question contains the question in its entirety.
F. Keywords
F. Keywords are words that describe, define, or closely linked to a subject. Keywords must be separated by semicolons.
G. Answer
G. Answer provides the answer to the question with pertinent links.

7. Make the changes that you want to in any of these fields. When you have finished editing the question. Click Save.
Creating a New Answer

To create a new AskTom public answer, click on the AskTom Answers Tab. From here you can edit current questions or create a new question.

1. Click New to create a AskTom Answer.

2. In the Article Information area choose a category for the answer by selecting the category view button to reveal the list of categories. Click on a category to select it.
**Category** describes the section where the article will be housed.

3. Next choose a status for the question from the drop-down menu (Draft, Published or Retired). **Status** chooses whether the article is a draft, retired or published.
If you are publishing the article, be sure the **Display in Self Service** is checked. **Display in Self Service** selects the question to be one of the 6 features articles on main self service page.

4. Next enter the **Title, Keywords, and Answer**.
   - **Title** displays the title of the article or the question the article will answer.
   - **Question** contains the question in its entirety.
   - **Keywords** are words that describe, define, or closely linked to a subject. Keywords must be separated by semicolons.
   - **Answer** provides the answer to the question with pertinent links.
   - **Video URL** will embed the URL of the video in a question.

5. The toolbar allows limited formatting in both the **Question** and **Answer** areas. This is also where you can add a hyperlink or photo to them as well.

6. Once you have edited the question the way it should appear, save the changes.
Creating a Customized View

1. Click on Create New View

2. To customize your own personal view, follow the steps below:
   A. Enter View Name. View Unique Name will automatically be created.

   B. Specify Filter Criteria. Filter by owner of all AskTom Answers or My AskTom Answers. Filter the fields that you want to appear in your AskTom window. Here you will also Add Filter Logic.
C. **Select Fields to Display.** Choose the fields to display by adding and removing them from *Available Fields* to *Selected Fields*. These fields will be the columns in the new view. Organize the order using the up, down, top and bottom buttons.

![Step 3. Select Fields to Display](image)

3. Click the **Save** button to save your changes. Click the **Cancel** button to cancel changes. *Note: the save and cancel buttons are located at the top and bottom of the window.*
Sorting and Viewing the AskTom Articles

AskTom records can be sorted by Article ID, Record Type, Category, Title, Status, Published Date, or Last Modified Date.

There are a few different ways to organize and sort the records. The quickest and easiest method is to sort the articles by the column header. The two most commonly sorted columns are Title and Category.

To sort articles by column header:

1. Select the view from the drop-down menu (All, Draft and In-Review or Published Articles). Click Go.

2. Choose the column you want to sort by selecting the column header. When the column is selected, it will have an arrow beside the name.

3. Once you have selected the column, you can view in alphabetical order by selecting the hyper linked letter of the alphabet located directly above and to the right of the columns.
Changing the Owner of an Article

If you find that an article has not been assigned correctly, you can change the owner and assign it to the correct area.

1. To change owner of the article, select the article that you want to change the owner for, then click on the **Change Owner** button.

2. (A) Look up the user name by clicking on the search icon. This will look up the identity of the user in the Remedyforce system. (B) You can also choose to send an email notification by selecting **Send Notification Email**. (C) Once you have made the change click **Save**, to save the changes and re-assign the owner.
Editing an AskTom Question

To edit an AskTom question, click on the AskTom Answers Tab. From here you can edit current questions or create a new question.

Note: Any time you see a RED bar located beside any item within the knowledge base. This means it is required to continue.

1. Click on the AskTom Answers Tab located at the top of the menu.

2. Once you have selected the AskTom Answers tab you can choose to edit Draft and In-Review Articles, Published Articles, Retired Articles or other categories.
Draft and In-Review Articles contain knowledge base articles that are in the process of being created or that are under review. Articles under Draft, In-Review, and Retired are not visible to anyone but AskTom administrators. Published articles contain all the currently active and visible knowledge-based items.

3. Once you have chosen the type article you want to edit (Published, Draft and In-Review, or Retired), select the question you would like to amend. Click Edit, to edit the question or Delete to delete it entirely.

4. Once you have selected the question you can edit and change the Category, Title, add or delete Keywords, Question, or the Answer.

Article information will tell you who the owner of the question is, what category the question belongs, and the status of the question (Draft, Published, or Retired).
Article Details contain all the information in the knowledge base article.

- **Title** displays the title of the article or the question the article will answer.
- **Question** contains the question in its entirety.
- **Keywords** are words that describe, define, or closely linked to a subject. Keywords must be separated by semicolons.
- **Answer** provides the answer to the question with pertinent links.
- **Video URL** will embed the URL of the video in a question.

Make the changes that you want to in any of these fields.

The toolbar allows limited formatting in both the Question and Answer Areas. This is also where you can add a hyperlink or photo to them as well.
Additional information provides a history of the ticket including the published date, review date, retired date, and the number of time the question was viewed in the system.

Once you have edited the question, click Save the changes.
Locating Help Resources

Upon completing the training covered in this course, faculty, staff, and students are able to receive additional training help and resources. Such help can be located as follows:

Service Desk Request

Submitting a Ticket

- Login URL:
  - Here is a link to our service desk ticketing system
  - After logging in, choose the link Request Help or Services.
  - Choose Request Help or Services.

Call the ITS Service Desk (901-678-8888) on a 24x7 basis (Excluding Some Holidays)

- Call the Service Desk for immediate assistance with login problems or issues with using the Service Desk Request Form.

Email umTech

- Email at umtech@memphis.edu (Using this email will automatically generate a help desk ticket). Please keep your Service Desk ticket number for faster assistance.

Important Links

- Explore the umTech Website
- Center for Teaching and Learning (CTL) Website
- Search our Training and Documentation