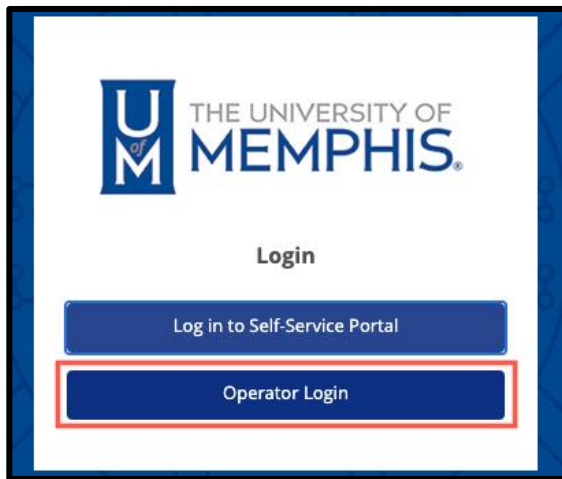


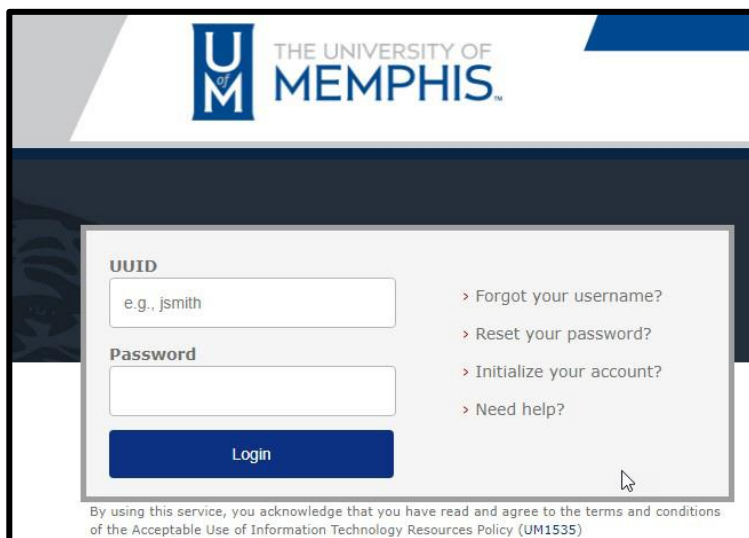
Getting Started

Logging into the System

1. Browse to [the Service Desk ticketing Website](#), choose **Operator Login**.

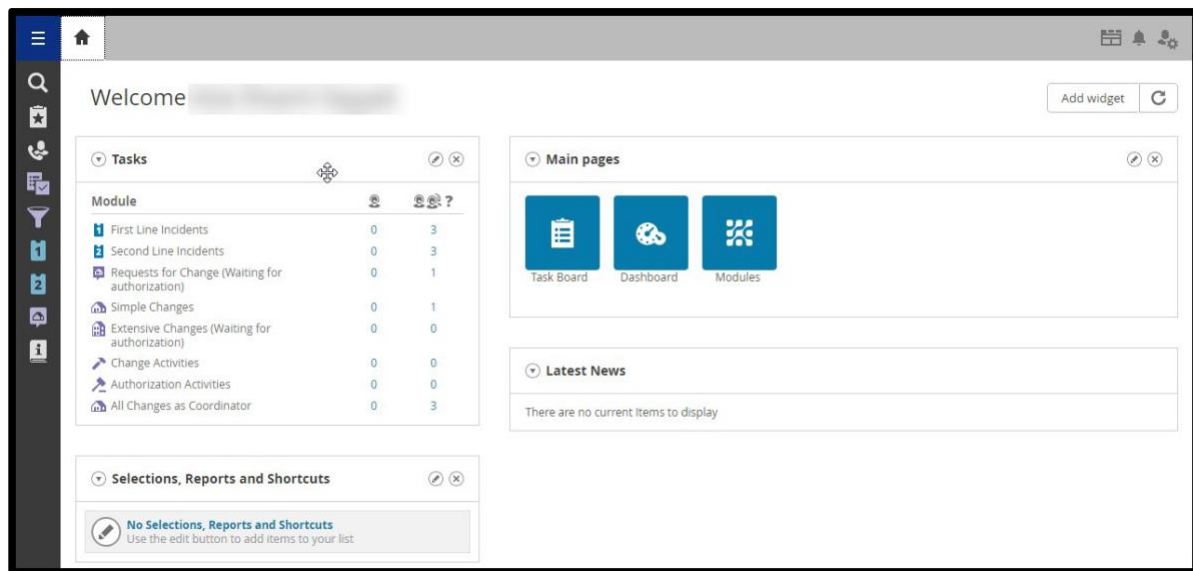


2. Login with your **UUID** and **password**. (The **UUID** and **password** is the same one you use for myMemphis Portal and all other campus resources.) Click **Login**. Next, authenticate with DUO.

A screenshot of the University of Memphis login form. The form is set against a dark blue background with the university logo at the top. It contains two input fields: "UUID" with the example "e.g., jsmith" and "Password". To the right of the input fields are four links: "> Forgot your username?", "> Reset your password?", "> Initialize your account?", and "> Need help?". A blue "Login" button is positioned below the input fields. At the bottom of the form, there is a small disclaimer: "By using this service, you acknowledge that you have read and agree to the terms and conditions of the Acceptable Use of Information Technology Resources Policy (UM1535)".

The opening screen is your personal TOPdesk workspace.

Note: This is the default view; the workspace can be customized.



Add Items to Your Quick Launch Bar

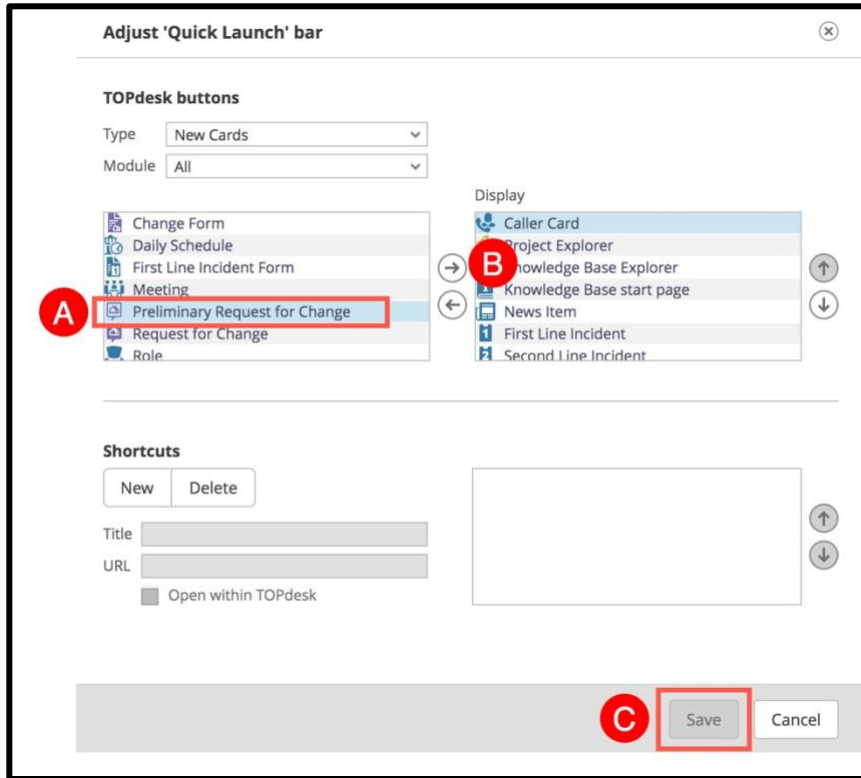
You can add buttons to the Side Launch bar to include links to internal or external web pages. It is also possible to add links to frequent activities.




1. Click on the Edit icon at the bottom left and bottom of the Quick Launch Bar.




2. To add a new Shortcut, **A)** click **Preliminary Request for Change** form to create a new shortcut icon and **B)** click **arrow** to move to right hand column. **C)** Click **Save**.



3. The shortcut will be created and displayed as  .
Note: Shortcuts created can be edited at any time.

Creating Preliminary Request for Change

Preliminary Request for Change can be created from a variety of locations within TOPdesk. The Quick Launch Bar is one way (and probably the fastest, if you have the shortcut). If you do not have the shortcut, see: *Add Items to Your Quick Launch Bar*.

Click on the Preliminary Request for Change () icon.

A new tab will then display the relevant Preliminary Request for Change:

Red areas indicate required fields.

New Request for Change: Tabs

Each New Request for Change card contains a series of tabs (any that are bold need to have information entered or updated):



General: Contains the main request information.

Route: Displays approval history.

Links: This option allows the operator to link additional users to the request. Linked users can then be sent an email as part of the request process.

Project: Allows one to place University Strategies and executive priority to the request. These can be chosen from a drop-down menu.

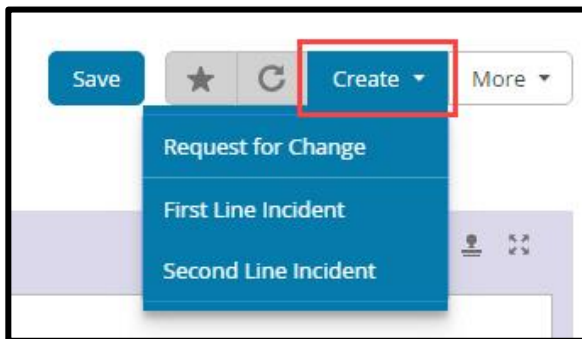
Attachments: Gives a document overview of any attachments associated with the change.

Preliminary Request for Change: Toolbar

Key options which you may need to use on an incident/ticket:



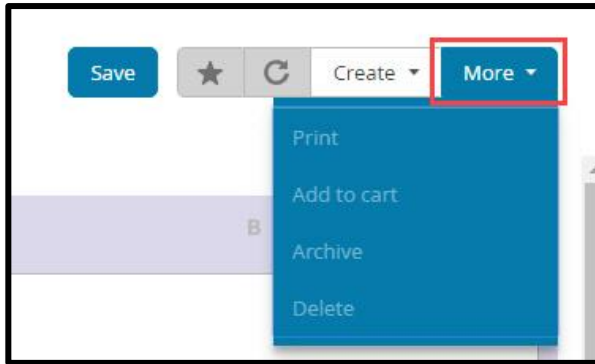
- A. Click to save a request
- B. Click to Bookmark a request
- C. Click to reload data on a page
- D. Create button allows you to create the following



- Create a new Request for Change using the current request as a template.

- Create a new **First Line Incident** or **Second Line Incident** using the current request as a template.

E. More:



- Print - To print a request
- Add to cart - *This option is not used*
- Archive - Click to archive the current request
- Delete - Click to delete the current request

Caller Area

GENERAL *	ROUTE	LINKS	PROJECT	PLANS & REVIEW	ATTACHMENTS
<p>▼ Caller</p> <p>Name: Tom Tiger</p> <p>Campus: Main Campus</p> <p>Employee Number: U00001234</p> <p>Network login name: ttiger</p> <p>Telephone Number: (901) 678-1234</p> <p>Email: ttiger@memphis.edu</p> <p>Department: ITS Support Teaching and Learning</p> <p>Room (Caller): [location name]</p>					

1. **Name:** Simply type the client's UUID (in this example, ttiger is used to find Tom Tiger).

This is entered as First Name, Last Name—if you begin typing the name TOPdesk will complete. If there are a number of people with similar names you can use the drop down to select the correct person.

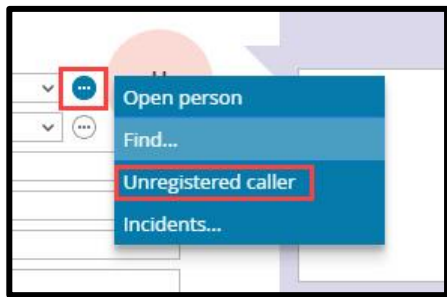
TOPdesk will pre-populate location, user name, and telephone number where available. This information is taken from LDAP; if it is incorrect, users should make changes in myMemphis portal.

*Note: If the caller does not have an LDAP record, the ticket can be created as an unregistered caller; click the right arrow and select **Unregistered caller**.*

In this case you will need to fill in the caller details/contact information manually.

Unregistered callers are not saved in the database, so if the same caller needs to log further tickets the information will need to be re-entered.

Emails coming into TOPdesk from unregistered users will use the 'name' associated with their email account.



Details Area

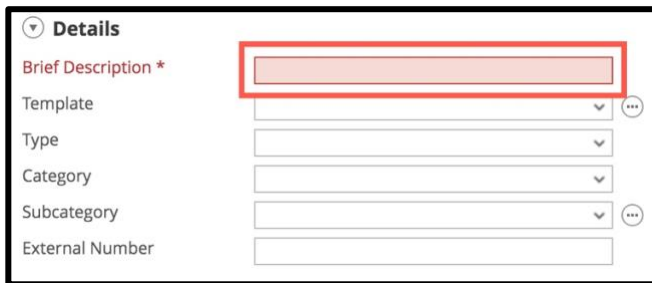
1. **Template:** Choose from templates in the drop-down menu.



Type: Categorizes requests from the following options within drop-down menu.

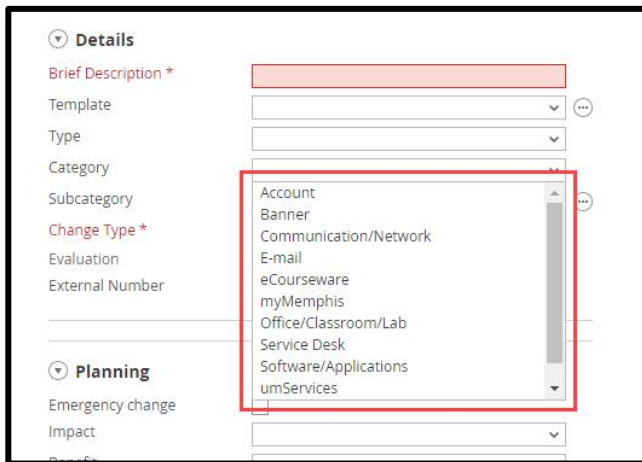
- **Emergency Change:** A change that is available for all to see.
- **Linux Patching Production**
- **Linux Patching in Test Banner Production**
- **Server OS Patching**
- **Planned Change Request:** A change that will only be seen in-house to operators within the TOPDesk system.

2. **Brief Description:** Provide a summary of the request.



The screenshot shows a form titled 'Details' with a dropdown arrow. The 'Brief Description *' field is highlighted with a red box. Below it are fields for 'Template', 'Type', 'Category', 'Subcategory', and 'External Number', each with a dropdown arrow and a menu icon.

3. **Category:** Choose the most appropriate category for the affected service. Choose the category from the drop-down menu.



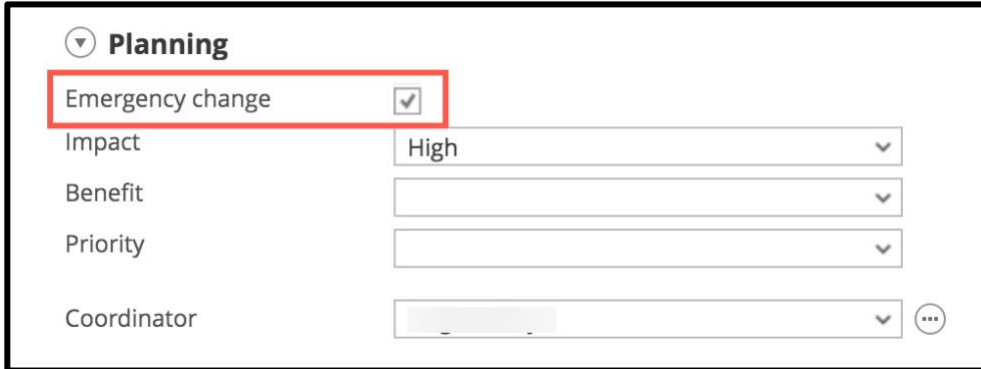
The screenshot shows the 'Details' section of the form. The 'Category' dropdown menu is open, displaying a list of options: Account, Banner, Communication/Network, E-mail, eCourseware, myMemphis, Office/Classroom/Lab, Service Desk, Software/Applications, and umServices. The list is highlighted with a red box. Below the 'Category' field is the 'Subcategory' field, and below that is the 'Change Type *' field. The 'Planning' section is also visible, with fields for 'Emergency change' and 'Impact'.

Sub Category: Sub category is based on by the Category chosen. Choose the most appropriate for the affected service.

External Number: An alternative number that is not listed as your contact in LDAP.

Planning

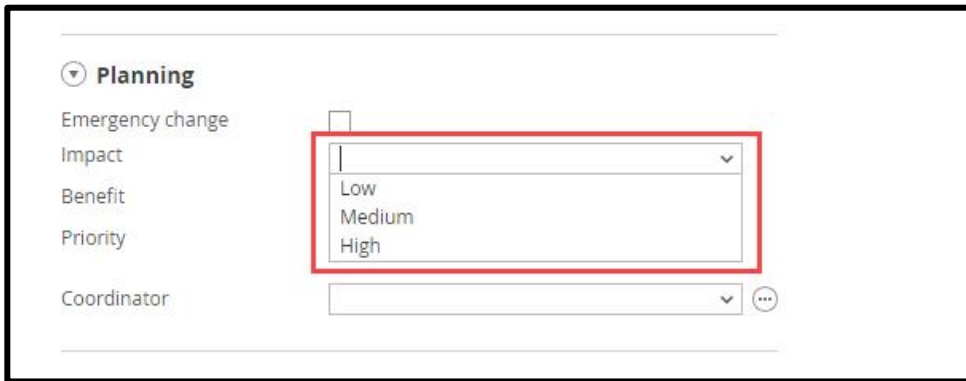
1. **Emergency Change:** This is a change that needs to be implemented immediately and should be selected by the template.



A screenshot of a 'Planning' form. The 'Emergency change' checkbox is checked and highlighted with a red box. The 'Impact' dropdown is set to 'High'. Other fields like 'Benefit', 'Priority', and 'Coordinator' are empty.

▼ Planning	
Emergency change	<input checked="" type="checkbox"/>
Impact	High
Benefit	
Priority	
Coordinator	

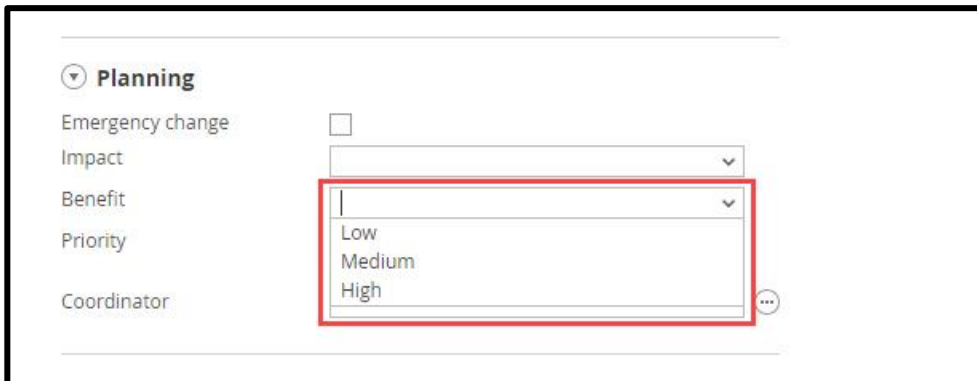
2. **Impact:** Choose from the following options: Low, Medium, High.



A screenshot of the 'Planning' form. The 'Emergency change' checkbox is unchecked. The 'Impact' dropdown menu is open, showing options 'Low', 'Medium', and 'High', which are highlighted with a red box. The 'Coordinator' field is empty.

▼ Planning	
Emergency change	<input type="checkbox"/>
Impact	Low Medium High
Benefit	
Priority	
Coordinator	

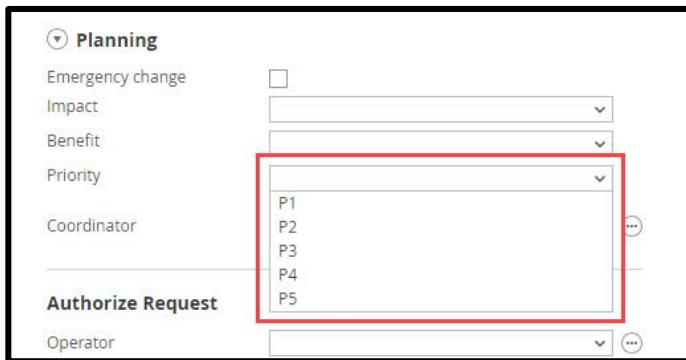
3. **Benefit:** Choose from the following option: Low, Medium, High.



A screenshot of the 'Planning' form. The 'Emergency change' checkbox is unchecked. The 'Benefit' dropdown menu is open, showing options 'Low', 'Medium', and 'High', which are highlighted with a red box. The 'Impact' field is empty. The 'Coordinator' field is empty.

▼ Planning	
Emergency change	<input type="checkbox"/>
Impact	
Benefit	Low Medium High
Priority	
Coordinator	

4. **Priority:** This is automatically calculated by the Impact and Urgency options selected. Priority (P1 - P5) in highest to lowest ranging from the drop-down menu. Choose a **Priority**.



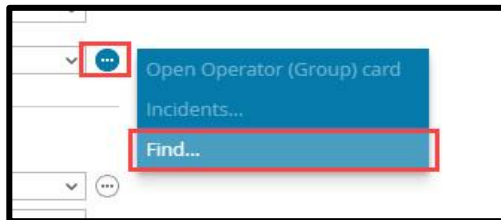
The screenshot shows a 'Planning' form with several fields: 'Emergency change' (checkbox), 'Impact' (dropdown), 'Benefit' (dropdown), 'Priority' (dropdown), 'Coordinator' (text input), and 'Operator' (dropdown). The 'Priority' dropdown menu is open, showing a list of options: P1, P2, P3, P4, and P5. A red box highlights the dropdown menu.

5. **Coordinator:** Select the name of the person overseeing the change request. =



The screenshot shows the same 'Planning' form. The 'Coordinator' dropdown menu is open, showing a search input field with the placeholder text '(first select a starting letter)'. A red box highlights the dropdown menu.

Or click on the three horizontal ... dots and click **Find** to browse a list.



6. Authorize Preliminary Request for Change

Define who is approving the change request.

Authorize Preliminary Request for Change

Manager: RfC Approval (Emergency Chg Mgr) [v] [⋮]

Manager group: Change Mgmt Manager Group [v] [⋮]

Status: [v]

Submit: April 16, 2019 3:28 PM [📅]

7. Operator: Begin typing the name of person who will approve the request.

Authorize Preliminary Request for Change

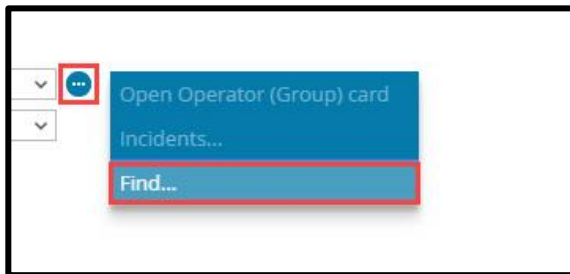
Manager: RfC Approval (Emergency Chg Mgr) [v] [⋮]

Manager group: Change Mgmt Manager Group [v] [⋮]

Status: [v]

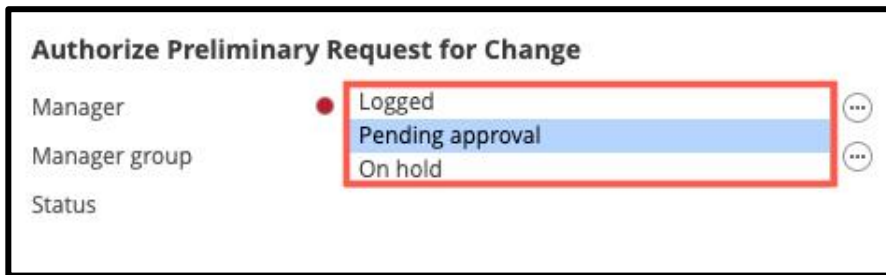
Submit: Logged
Pending approval

Or click on the three horizontal ••• dots and click **Find** to browse a list.



Note: If you have allocated a request to yourself but become unavailable, another operator may pick up the request and reassign it to themselves.

8. **Status:** Status of the request, choose from:



The screenshot shows a form titled "Authorize Preliminary Request for Change". It has fields for "Manager", "Manager group", and "Status". A dropdown menu is open for the "Status" field, showing three options: "Logged", "Pending approval", and "On hold". The "Pending approval" option is highlighted in blue. There are three dots to the right of the dropdown menu.

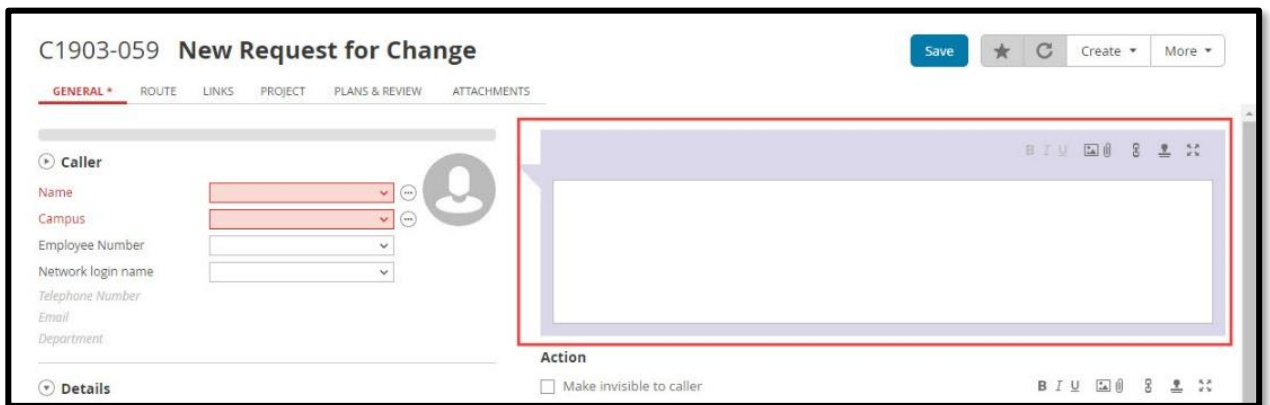
- Accepted - Indicates the manager has accepted the change request.
- In Progress - Indicates that the change request is in progress.
- Logged - Refers to the hours worked on a change request.
- Pending approval - Indicates that for the change request to continue, someone must approve.
- Pending user - Indicates that for the change request to continue, another person must complete a task.
- Rejected - Sends project back to change request initiator.

9. **Approval Status:** Enter approval status.




The screenshot shows a form titled "Authorize Request". It has fields for "Operator" and "Status". The "Status" dropdown menu is open, showing the option "Pending approval". There are three dots to the right of the dropdown menu.

10. **Request Area**




The screenshot shows a form titled "C1903-059 New Request for Change". It has a "Save" button and a "More" dropdown menu. The form is divided into sections: "GENERAL", "ROUTE", "LINKS", "PROJECT", "PLANS & REVIEW", and "ATTACHMENTS". The "Caller" section has fields for "Name", "Campus", "Employee Number", "Network login name", "Telephone Number", "Email", and "Department". The "Request Area" is a large text area with a red border, containing a rich text editor toolbar with icons for bold, italic, underline, link, unlink, list, and image. The "Action" section has a checkbox for "Make invisible to caller" and another rich text editor toolbar.

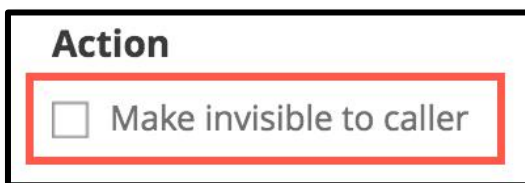
Use this area to give a detailed description of the request. You can attach a file in this area using the attachment icon .

11. **Action Area**

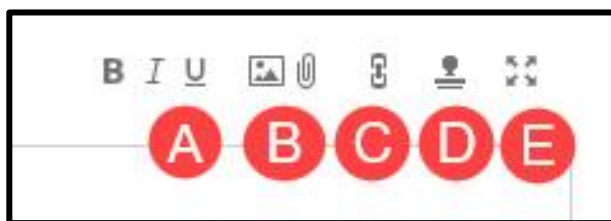


Use this area to record the actions you have taken to resolve the Incident. Insert text into your response. You can attach a file in this area using the attachment icon .


Make Invisible for caller: This can be used to make notes within the Incident for either yourself or another operator group.



Use the formatting bar located to the right and above the Action area, to **A)** format text, **B)** include an attachment, **C)** include a link, **D)** create default text or **E)** enlarge Action area.



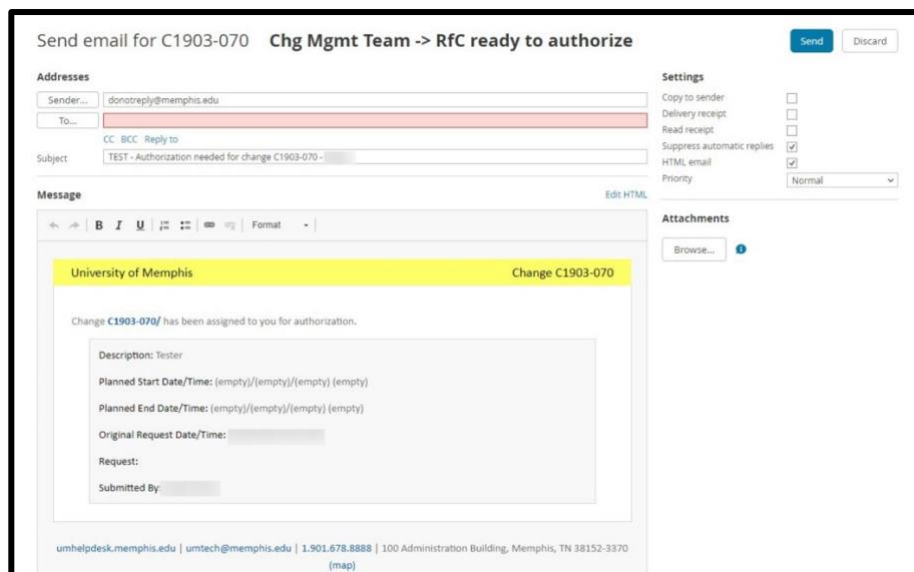
Saving the Request

The request can be saved by clicking  , the request is then assigned a request number. For example, “C1811-028”: this is made up of “C” indicating this is a Change Request, “18” which shows the year logged, “11” shows the month logged, and “028” which is the request number.

Once the request has been saved, the actions are date and time stamped and displayed with the most recent action appearing just under the New Action area.



TOPdesk will automatically create an email to the appropriate group or manager with details of the information you entered in the Action Area.



The message can be edited and added to before sending if needed. Just below **To:** you can select **CC**, **BCC** or **Reply to** information. The Attachments tab can be used to attach files, media, etc. to the message.

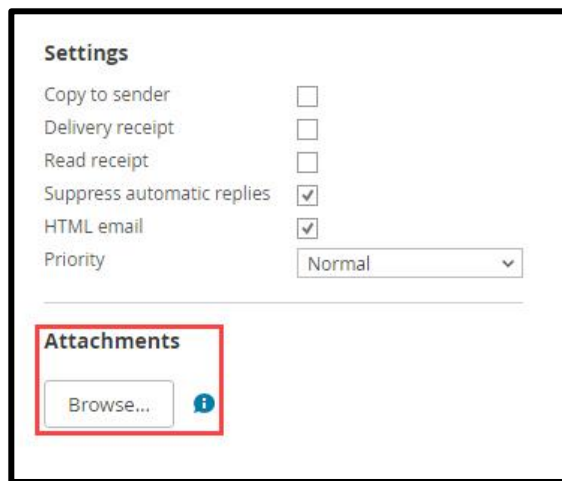
Attaching Files to an Email

You can attach files to an email by selecting the **Browse** button. This will upload any file on your device and attach it to the email.

Note: To attach a file to an Email, you must choose to do so as you compose the email.

When composing an email, TOPdesk presents you with an email window.

1. Click on the **Attachments** tab to see the available attachments (those already uploaded).



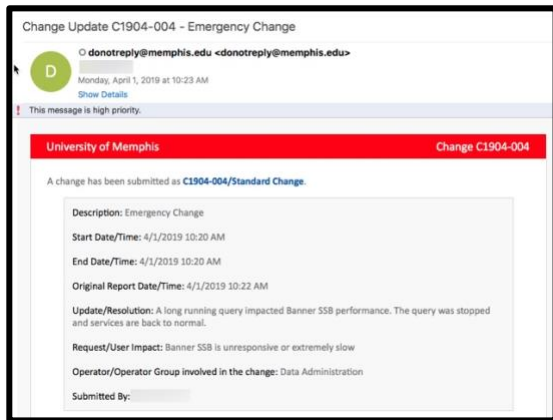
2. Select the attachment you wish to use by clicking the check box next to it. When you send the email, the file will be attached to it. Once satisfied with the email, click **Send**. If for any reason you do not wish to send the email, click **Discard**.

*Note: Even if you have checked the **Make Invisible to Caller** box TOPdesk will still attempt to send the caller an email—however, the email will contain the last Action Information that was visible to the caller rather than the invisible comment. You also have the capability to discard.*

Handy Hints:

- **Red Fields:** Indicate mandatory fields.
- **Caller Name:** Enter the person's UUID in the **Network Login Name** field rather than entering their name.
- **Changing Caller Name:** If you select the incorrect person, click in the name field and retype the correct name.
- **Contact Information:** Caller details should not be edited as they will be overwritten by the next import. Instead, alternative contact information should be recorded in the Request Area.
- **Make Invisible to Caller:** Can be used to make notes within the incident and will not be visible to the caller.
- **Emails:** Can be edited before sending. Actions added using the Make Invisible feature will not be sent. Instead, TOPdesk will send the last visible action.

Example of Emergency Change Email:



Example of Planned Change:

