




Viewing & Opening Change Management Modules Assigned to You or Your Department


Requests that are assigned to you (or your operator group) will be displayed in your **Tasks Overview** on your main TOPdesk workspace.

1. The Tasks block displays the number of tasks that must be processed by you  or your operator group  and the number of requests which are unassigned. The left column displays the tasks assigned specifically to you.

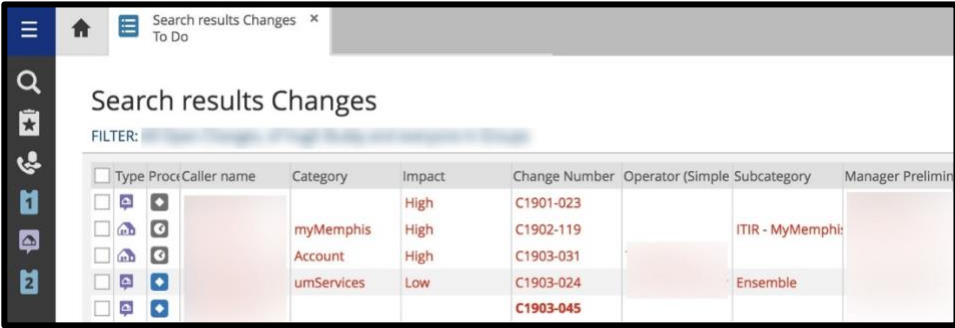







Module		  ?
 First Line Incidents	0	0
 Second Line Incidents	0	0
 Project Activities	0	39

The layout of the Tasks overview can be edited and customized using the Edit button .

*Note: TOPdesk does not automatically refresh your tasks you must click the **Refresh Button**  to see an up-to-date list of your tasks. Do not use the refresh on your browser.*

2. To access a list of the requests, click the number shown, the Tasks list is then displayed.



Type	Procc/Caller name	Category	Impact	Change Number	Operator (Simple Subcategory)	Manager Prelimin
<input type="checkbox"/>			High	C1901-023		
<input type="checkbox"/>		myMemphis	High	C1902-119		ITIR - MyMemphi
<input type="checkbox"/>		Account	High	C1903-031		
<input type="checkbox"/>		umServices	Low	C1903-024		Ensemble
<input type="checkbox"/>				C1903-045		

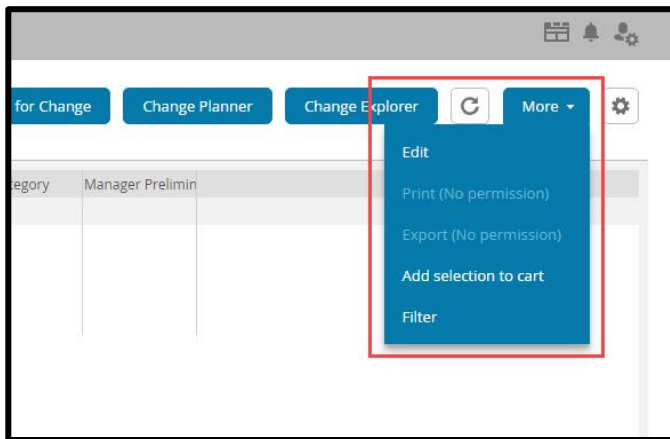
The Task list can be edited, sorted, and the columns adjusted to suit the individual operator. Click the upper edge of the column to sort by column; the arrow displayed will indicate whether the information is sorted in ascending or

descending order  .

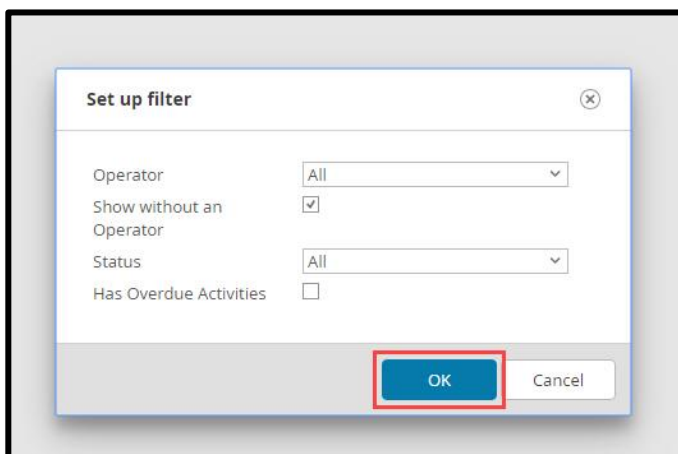
The layout is also controlled by any settings selected in your User Settings. For example, coloring of tasks dependent on due date.

Selecting the check box at the end of a request line will display a request summary at the bottom of the screen.

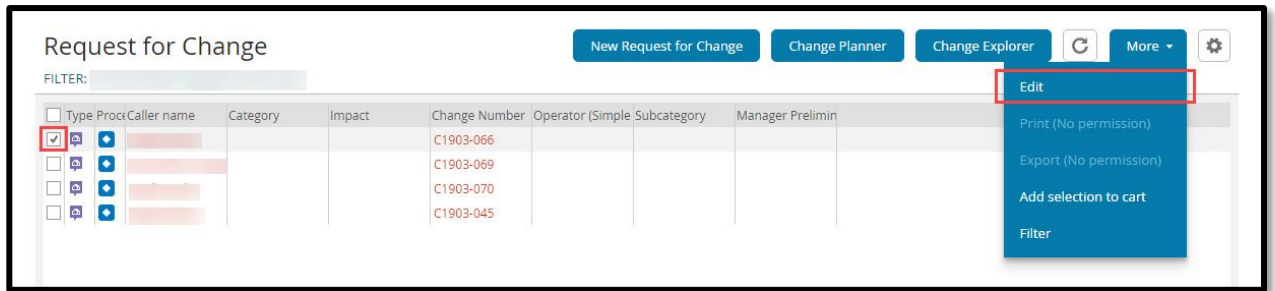
3. The Task list can also be filtered to make it easier to find a particular item. To filter, select Filter from the drop-down menu.



Use the drop downs and radio buttons to create your filter and click **OK**.



- To open and edit the request card, select the associated check box and choose edit button from the drop-down menu, the request card is loaded in a new tab.



- As with a new request, you can now edit, update, escalate, assign the request to yourself, record time taken, or resolve the request.
- Remember to save if you have made any changes.

Resolving/Completing a Request

- When a Request has been finished, you will need to ensure the request is completed.
- Open the Request and select Completed from the Status drop down. The request will then automatically date and time stamp the end of the request.



3. A) Enter the Final Action Note then B) Click Save to save changes made.

The screenshot shows a web application interface for a Request for Change. At the top right, a blue 'Save' button is highlighted with a red box. Below it are icons for a star, refresh, 'Create', and 'More'. The main interface has a breadcrumb trail: 'Simple Change : Request > In Progress > Implemented'. On the left, there are sections for 'Main Campus' (with fields for Telephone Number and Department), 'test' (with fields for Type, Category - Subcategory, Simple Change, and External Number), and 'Planning' (with fields for Impact, Benefit, Priority, Coordinator, and Authorization date). The main content area has a large text input field and an 'Action' section with a checkbox 'Make invisible to caller'.

4. An email will then be automatically sent to the appropriate group confirming the request is completed.

Setting a Start Date and Target date

Make sure that simple Plan dates are set for Preliminary Request for Change.

1. Go to Management tab

The screenshot shows the 'C1904-111 New Request for Change' interface. The 'MANAGEMENT' tab is highlighted with a red box. The breadcrumb trail is 'GENERAL * MANAGEMENT ROUTE LINKS PROJECT PLANS & REVIEW ATTACHMENTS'.

2. Under Simple Change (Plan) choose a **Start Date** and a **Target Date**.

C1904-111 New Request for Change

GENERAL * MANAGEMENT ROUTE LINKS PROJECT PLANS & REVIEW ATTACHMENTS

General
Request date April 19, 2019 10:20 AM

Request for Change (Plan)
Authorization date April 19, 2019 10:20 AM

Simple Change (Plan)
Start Date
Target Date

Submission date
Submitted on April 19, 2019 10:20 AM
Manager
Manager group

Realized authorization date
Authorization date
Operator

Simple Change (Realized)
Started
Implementation date
Closed

Comments

3. Click **Save**.



Add Change Calendar 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 **Change Calendar** form to create a new shortcut icon and **B)** click **arrow** to move to right hand column. **C)** Click **Save**.

Adjust 'Quick Launch' bar

TOPdesk buttons

Type: All
Module: Change Management

Change Calendar (A)

Display

Caller Card (B)

Request for Change

Preliminary Request for Change

Project Explorer

Knowledge Base Explorer

Knowledge Base start page

News Item

Shortcuts


New Delete

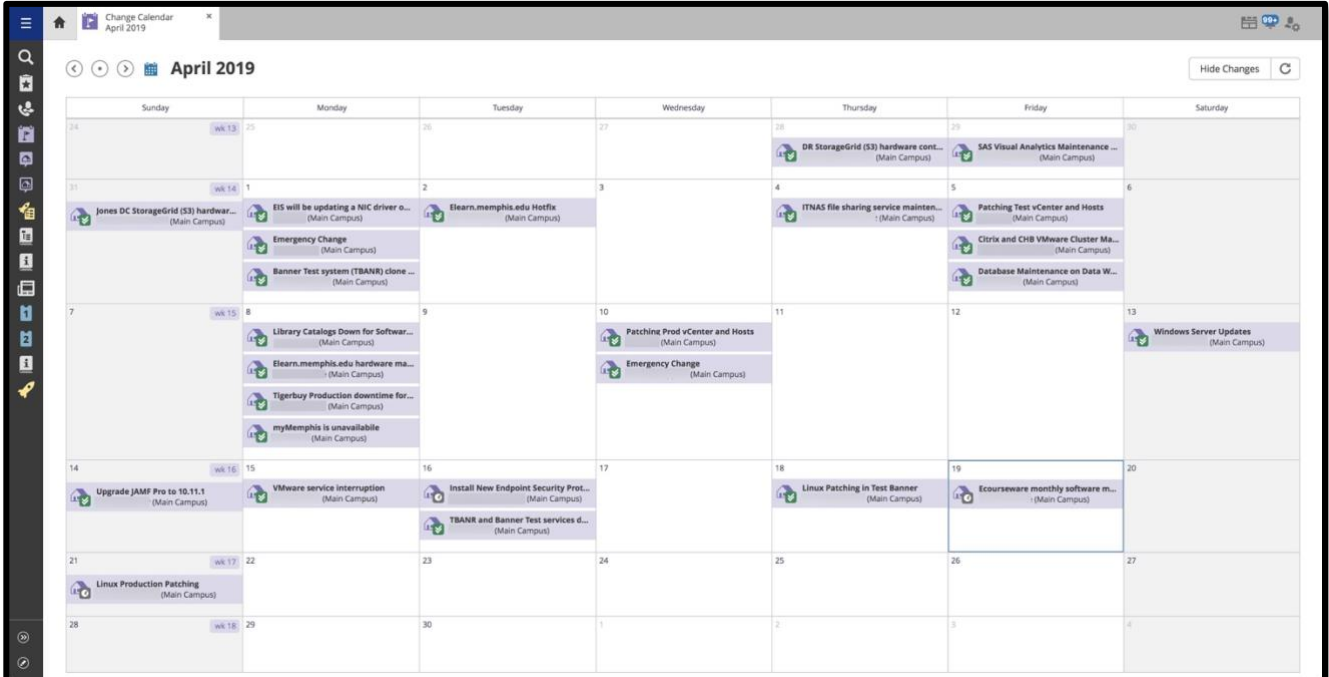
Title

URL

Open within TOPdesk

Save (C) Cancel

3. When you click on the  in the Side Launch Bar, the calendar view of **Preliminary Request for Change Calendar** can be seen.



The screenshot displays a web-based calendar interface for April 2019. The interface includes a top navigation bar with a home icon, a search icon, and a 'Change Calendar' title. A side launch bar on the left contains various application icons. The main calendar area shows a grid of days from Sunday to Saturday. Each day contains a list of scheduled events, each represented by a small icon and a text label. The events are categorized by week (e.g., 'wk 13', 'wk 14').

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
24 wk 13	25	26	27	28 DR StorageGrid (S3) hardware cont... (Main Campus)	29 SAS Visual Analytics Maintenance ... (Main Campus)	30
31 wk 14	1 Jones DC StorageGrid (S3) hardwar... (Main Campus)	2 Elearn.memphis.edu Hostfix (Main Campus)	3	4 ITNAS file sharing service mainten... (Main Campus)	5 Patching Test vCenter and Hosts (Main Campus)	6
7 wk 15	8 Emergency Change (Main Campus) Banner Test system (TBANK) clone ... (Main Campus)	9	10 Patching Prod vCenter and Hosts (Main Campus) Emergency Change (Main Campus)	11	12 Citrix and CHB VMware Cluster Ma... (Main Campus) Database Maintenance on Data W... (Main Campus)	13 Windows Server Updates (Main Campus)
14 wk 16	15 Library Catalogs Down for Softwar... (Main Campus) Elearn.memphis.edu hardware ma... (Main Campus) Tigerbuy Production downtime for... (Main Campus) myMemphis is unavailable (Main Campus)	16 Install New Endpoint Security Prot... (Main Campus) TBANK and Banner Test services d... (Main Campus)	17	18 Linux Patching in Test Banner (Main Campus)	19 Ecourseware monthly software m... (Main Campus)	20
21 wk 17	22 Upgrade JAMF Pro to 10.11.1 (Main Campus)	23	24	25	26	27
28 wk 18	29	30	1	2	3	4