

## Creating a New First or Second Line Incident

New Incidents can be created from a variety of locations within TOPdesk. The Quick Launch Bar is one way and probably the fastest.

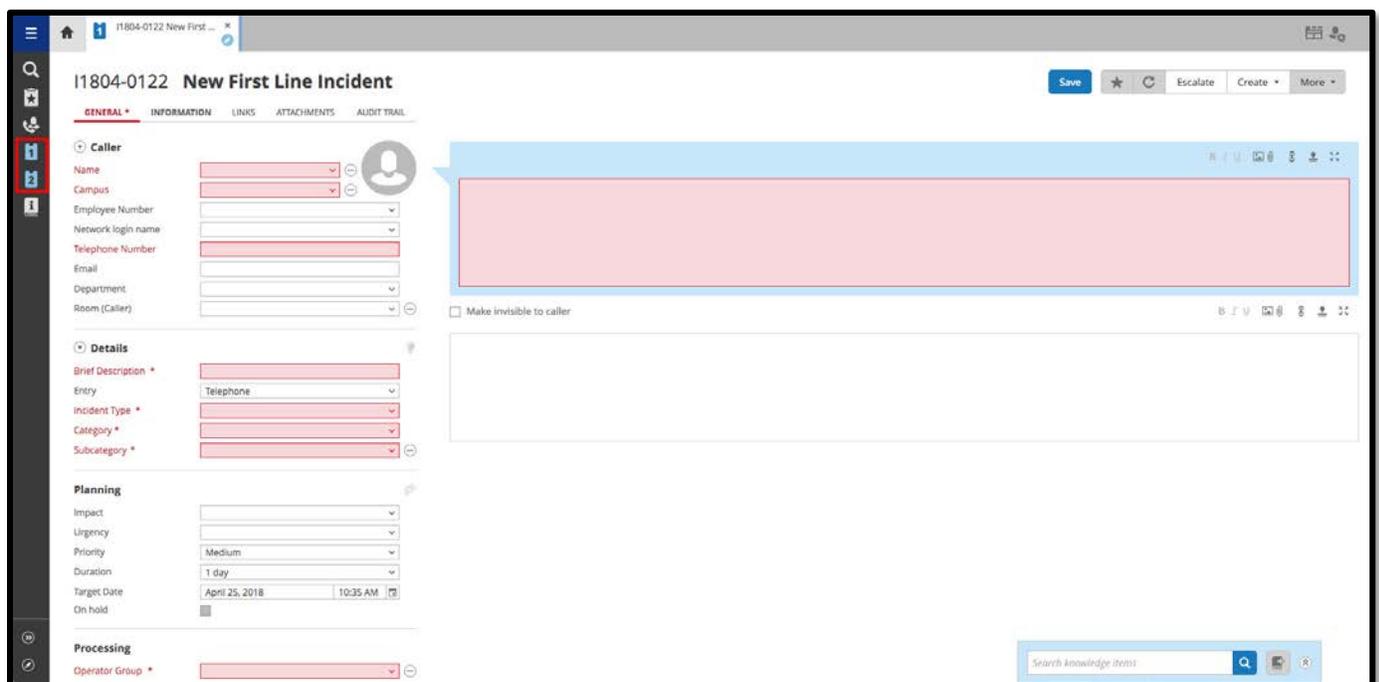
*Note: Only if you have the shortcut.*

Both first and second line incidents are created in the same way—the difference being:

- A First Line Incident is most often handled by the Service Desk.
- A Second Line Incident is one that is more complex, requires additional time, and can be resolved by LSP's and other ITS members.

Click on either the first Line (  ) or second line (  ) Incident icon.

A new tab will then display the relevant New Incident Card:



Red areas indicate required fields.

## Incident Tabs

Each incident card contains a series of incident tabs (any that are bold, need to have information input or updated):



**General:** Contains the main ticket information.

**Information:** Gives ticket information such as open time, how long it has been on hold, and major incident marker.

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

**Attachments:** Gives a document overview of any attachments sent to the caller, the emails tab shows the emails sent for the ticket.

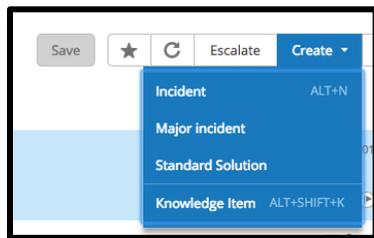
**Audit Trail:** Each ticket has a specific set of audited items such as changing/adding details or changing assignee all of which are date and time stamped.

## Incident/Card Toolbar

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

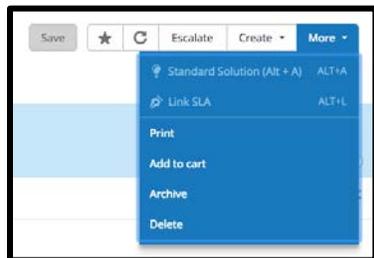


- A. Save the ticket - Click to save a ticket
- B. Bookmark - Click to Bookmark a ticket
- C. Reload data - Click to reload data on a page.
- D. Escalate or De-escalate a ticket from First Line to Second Line
- E. Create - Create button allows you to create the following:



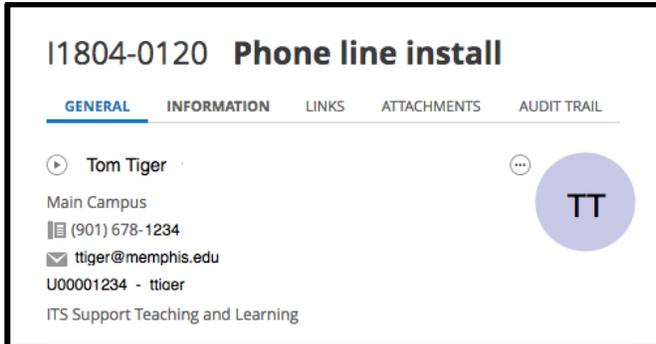
- Create a new incident or major incident using the current incident as a template.
- Create a new standard solution - *Option available to designated Operators.*
- Create a Knowledge Item by copying incident data to Knowledge base - *This option is only available to Knowledge Base Operators.*

F. More



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

## Caller Area



11804-0120 **Phone line install**

**GENERAL** INFORMATION LINKS ATTACHMENTS AUDIT TRAIL

▶ Tom Tiger ⋮ 

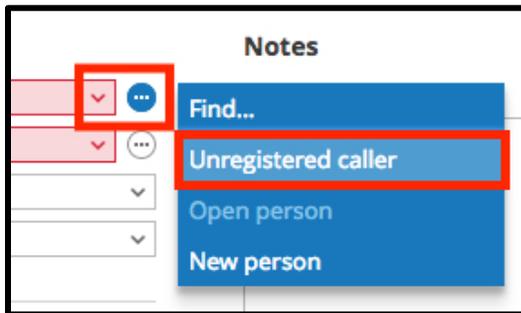
Main Campus  
📞 (901) 678-1234  
✉ ttiger@memphis.edu  
U00001234 - ttiger  
ITS Support Teaching and Learning

**Login Name:** Simply type the client's username (in this example Tom Tiger) or UUID (in this example ttiger).

*Note: TOPdesk will also 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.*

**Name:** 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.

**No LDAP Record:** 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**.



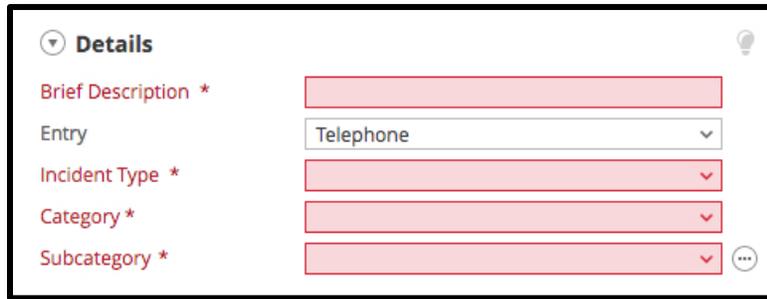
In this case you will need to fill in the caller details/contact information manually.

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.

*Please also refer to the VIP process, later in this document for details of how to identify and handle a VIP.*

## Details Area



<b>Details</b>	
Brief Description *	<input type="text"/>
Entry	Telephone
Incident Type *	
Category *	
Subcategory *	

**Brief Description:** Provides a summary of the incident.

**Incident Type:** Categorizes incidents from the following options

- **Issue:** Something is broken and not working.
- **Request:** Request access or change to a service.
- **Question:** If you have a question to ask.

**Category:** Choose the most appropriate category for the affected service.

**Sub Category:** Sub category is determined by the Category chosen, again choose the most appropriate for the affected service.

## Planning

**Planning**

Impact

Urgency

Priority

Duration

Target Date

On hold

**Impact:** Who/What is affected Choose from the following options: Just Me, My Office, Building, Campus, or Community.

**Planning**

Impact

Urgency

Priority

Duration

Target Date

On hold

**Urgency:** Choose from: Able to Work, Partially able to work, Not Able to work

**Planning**

Impact

Urgency

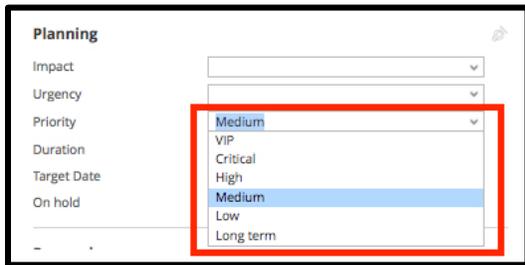
Priority

Duration

Target Date

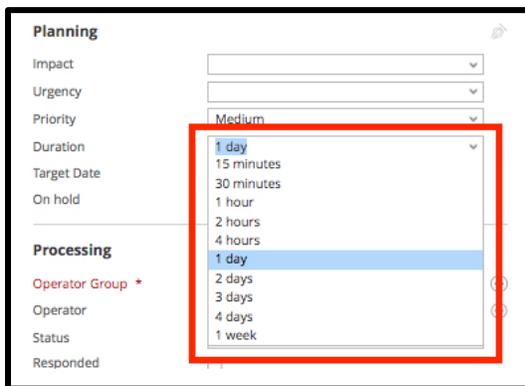
On hold

**Priority:** This is automatically calculated by the Impact and Urgency selected.



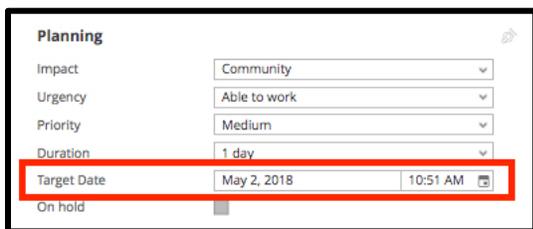
**Planning**  
 Impact: [ ]  
 Urgency: [ ]  
 Priority: **Medium**  
 Duration: [ ]  
 Target Date: [ ]  
 On hold: [ ]

**Duration:** This is determined by the Priority.



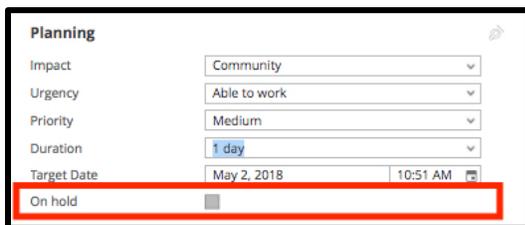
**Planning**  
 Impact: [ ]  
 Urgency: [ ]  
 Priority: Medium  
 Duration: **1 day**  
 Target Date: [ ]  
 On hold: [ ]  
**Processing**  
 Operator Group \* [ ]  
 Operator [ ]  
 Status [ ]  
 Responded [ ]

**Target Date:** This is pre-populated based on Priority.



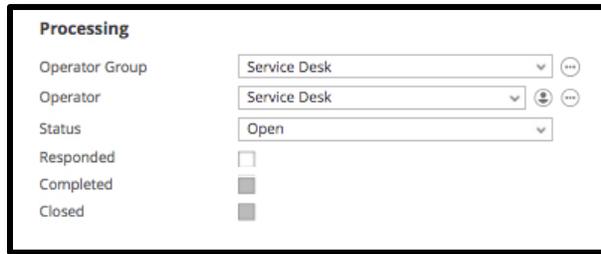
**Planning**  
 Impact: Community  
 Urgency: Able to work  
 Priority: Medium  
 Duration: 1 day  
 Target Date: May 2, 2018 10:51 AM  
 On hold: [ ]

**On Hold:** This will only populate when the options 'Awaiting 3rd Party' or 'Awaiting Customer' are selected in the Status field. You cannot select this option.



**Planning**  
 Impact: Community  
 Urgency: Able to work  
 Priority: Medium  
 Duration: 1 day  
 Target Date: May 2, 2018 10:51 AM  
 On hold:

## Processing Area



**Processing**

Operator Group: Service Desk

Operator: Service Desk

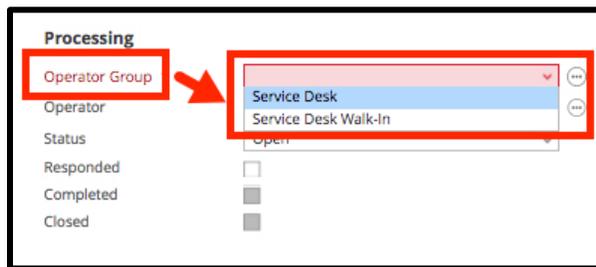
Status: Open

Responded:

Completed:

Closed:

**Operator Group:** The group of people who are best suited to dealing with this ticket. For example: Service Desk, Network Services, LSP's, etc. In the example below the Service Desk is used as an operator group.



**Processing**

Operator Group: Service Desk

Operator: Service Desk

Status: Open

Responded:

Completed:

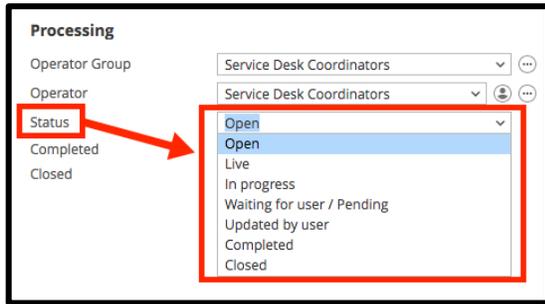
Closed:

**Operator:** This should initially be set to the same value as the Operator Group to show that work has not yet started on the ticket within this Operator Group.

If you are creating the incident and will be working on it, you should assign it to yourself; TOPdesk will not do this automatically.

*Note: If you have allocated an incident to yourself and are then unavailable, this does not stop another operator picking up the incident and reassigning it to themselves.*

**Status:** Status of the ticket, choose from:

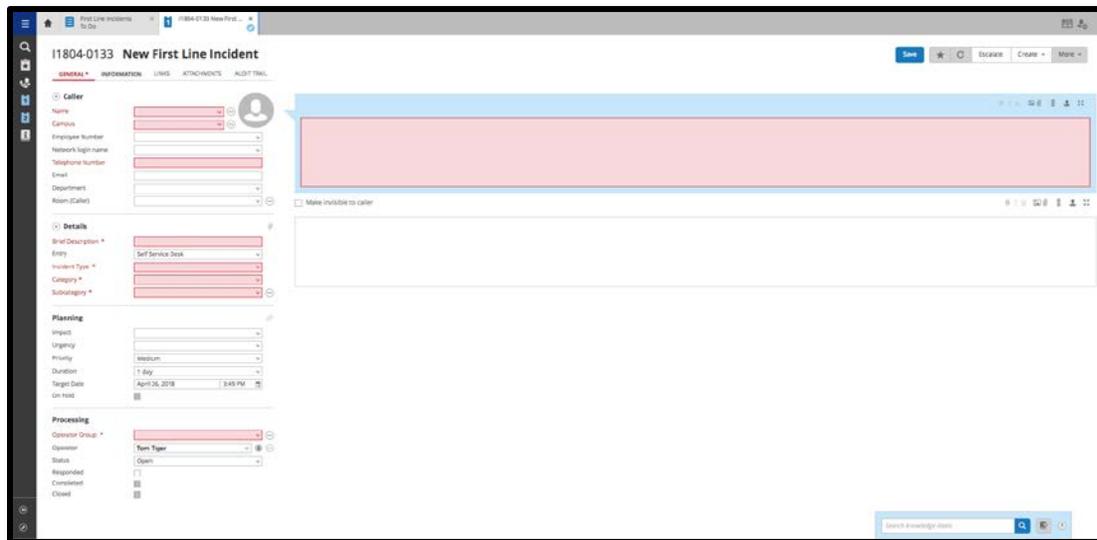


The screenshot shows a 'Processing' section with several dropdown menus. The 'Status' dropdown is highlighted with a red box, and a red arrow points to it from the left. The dropdown menu is open, showing the following options: Open (highlighted in blue), Open, Live, In progress, Waiting for user / Pending, Updated by user, Completed, and Closed. The 'Operator Group' and 'Operator' dropdowns are also visible, both set to 'Service Desk Coordinators'.

- **Open** - Work has not begun on this ticket.
- **In Progress** - Ticket is being worked on - this is not automatic so you must select this when you create or assign an incident to yourself.
- **Waiting for User/Pending** - Stops time being recorded against the incident for reporting purposes.
- **Updated by User** - When a caller responds to the ticket, the system will use this status as the notification.
- **Completed** - Ticket is completed, email is sent to client to confirm.
- **Closed** - The ticket is Closed.

*Note: If the user replies to the closed ticket email, TOPdesk does NOT automatically re-open the ticket.*

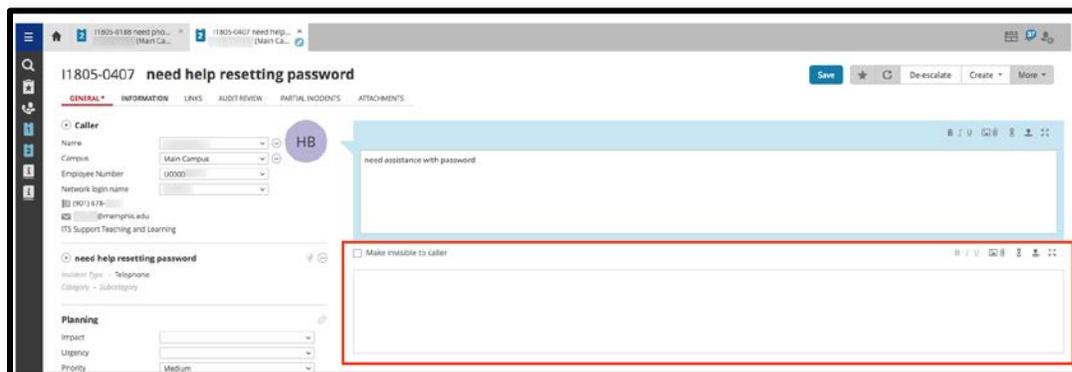
## Request Area



The screenshot shows a ticketing system interface for a 'New First Line Incident' with ID 11804-0133. The interface is divided into several sections on the left and a main content area on the right. The left sidebar contains sections for 'Caller', 'Details', 'Planning', and 'Processing'. The 'Caller' section includes fields for Name, Campus, Employee Number, Network login name, Telephone number, Email, Department, and Room (Caller). The 'Details' section includes fields for Brief Description, Entry (set to 'Self Service Desk'), Incident Type, Category, and Subcategory. The 'Planning' section includes fields for Impact, Urgency, Priority (set to 'Medium'), Duration (set to '1 day'), Target Date (set to 'April 26, 2018 3:45 PM'), and On Hold. The 'Processing' section includes fields for Operator Group (set to 'Team Tiger'), Operator, Status (set to 'Open'), Responded, Comment, and Closed. The main content area on the right has a large text input field for the incident description, which is currently empty. There is a 'Make invisible to caller' checkbox below the text field.

**Details:** Details contain a brief description, Entry (how the ticket was entered), Incident Type, Category and Subcategory. Tickets logged through the user self-service portal will automatically be logged as Self-Service.

## Action Area



The screenshot shows a ticketing system interface for an incident with ID 11805-0407 titled 'need help resetting password'. The interface is similar to the previous one, with a left sidebar and a main content area. The left sidebar includes sections for 'Caller', 'Details', 'Planning', and 'Processing'. The 'Caller' section includes fields for Name, Campus (set to 'Main Campus'), Employee Number (set to 'UC000'), Network login name, Email (set to 'UC01@memphis.edu'), and ITS Support Teaching and Learning. The 'Details' section includes fields for Incident Type (set to 'Telephone') and Category (set to 'Subcategory'). The 'Planning' section includes fields for Impact, Urgency, and Priority (set to 'Medium'). The main content area on the right has a large text input field for the incident description, which contains the text 'need assistance with password'. There is a 'Make invisible to caller' checkbox below the text field.

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 .

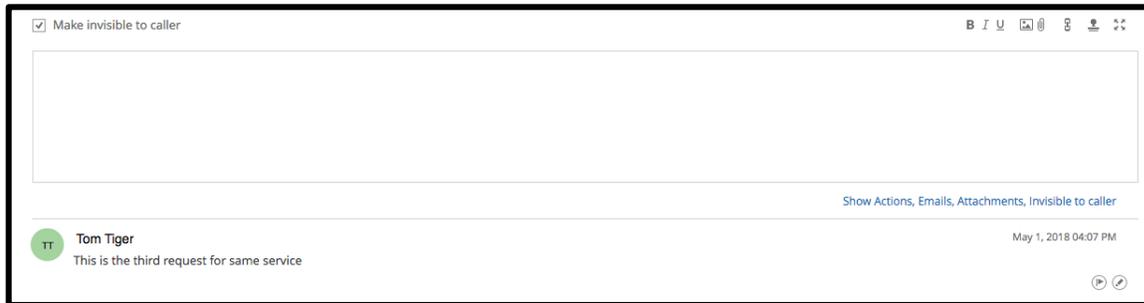
**Make Invisible for caller:** This can be used to make notes within the Incident for either yourself or another operator group.



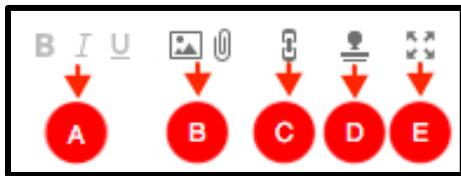
A close-up of the 'Make invisible to caller' checkbox, which is currently unchecked. The checkbox is located in the bottom right corner of the main content area of the ticketing system interface.

**Saving the Ticket:** The ticket can then be saved by clicking  , the ticket is then assigned a ticket number for example "I18-0000126" this is made up of "I" indicating this is an incident, "18" which shows the year logged and "0000126" which is the ticket number.

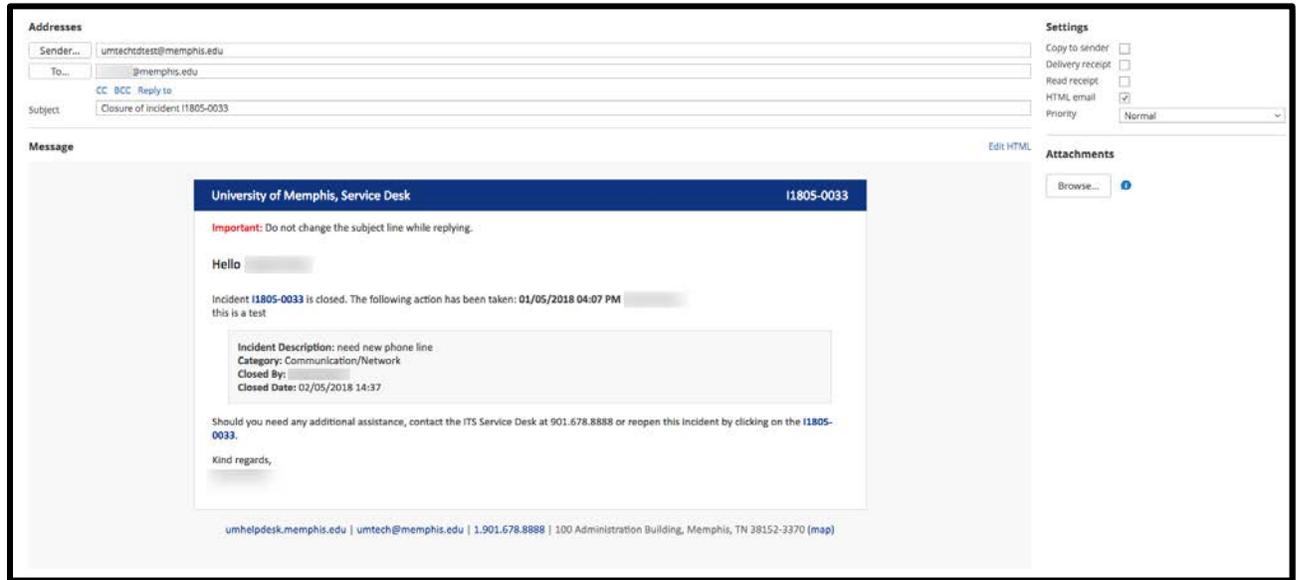
Once the ticket has been saved, the actions are date and time stamped and are displayed with the most recent action appearing just under the New Action area.



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



TOPdesk will automatically create an email to the client with details of the information you entered in the Action Area.



**Addresses**

Sender... umtechdtest@memphis.edu

To... @memphis.edu

CC BCC Reply to

Subject: Closure of Incident: I1805-0033

**Settings**

Copy to sender

Delivery receipt

Read receipt

HTML email

Priority: Normal

**Message**

University of Memphis, Service Desk I1805-0033

**Important:** Do not change the subject line while replying.

Hello [redacted]

Incident I1805-0033 is closed. The following action has been taken: 01/05/2018 04:07 PM [redacted]  
this is a test

Incident Description: need new phone line  
Category: Communication/Network  
Closed By: [redacted]  
Closed Date: 02/05/2018 14:37

Should you need any additional assistance, contact the ITS Service Desk at 901.678.8888 or reopen this incident by clicking on the I1805-0033.

Kind regards,

umhelpdesk.memphis.edu | umtech@memphis.edu | 1.901.678.8888 | 100 Administration Building, Memphis, TN 38152-3370 (map)

**Attachments**

Browse...

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.

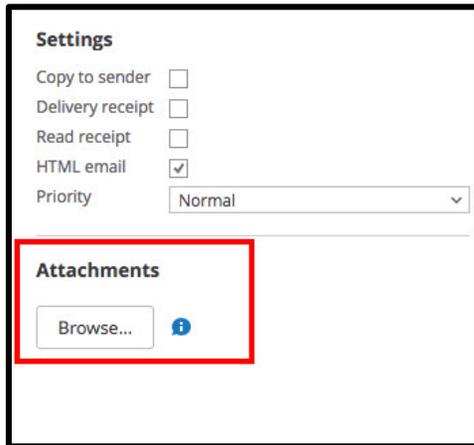
### Attaching Files to an Email

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 itself.*

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).



The screenshot shows the 'Settings' section of an email composition window. It includes options for 'Copy to sender', 'Delivery receipt', 'Read receipt', 'HTML email' (checked), and 'Priority' (set to 'Normal'). Below this is the 'Attachments' section, which is highlighted with a red rectangular box. It contains a 'Browse...' button and an information icon.

2. Select the attachment you wish to use by clicking the check box next to it. When you send the email and 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 which was visible to the caller rather than the invisible comment.*

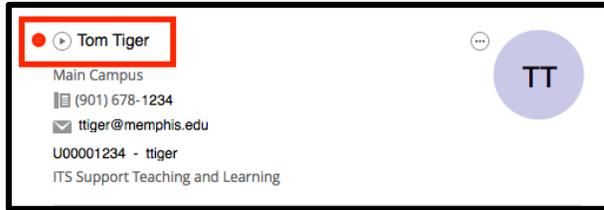
Handy Hints:

- **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 over written 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.

## VIP Process

A VIP is identified as a client within the university who, often because of his/her position, will receive a higher level of service.

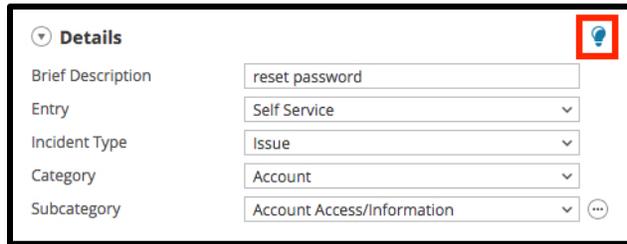
1. When a VIP client is selected in a ticket, a small red circle will appear next to his/her name:



2. If you log a ticket for a VIP client, the ticket **Urgency** is automatically increased.

## Using a Standard Solution to Resolve an Incident

A standard solution is a tried and tested method of resolving some of the most common incidents.



**Details**

Brief Description: reset password

Entry: Self Service

Incident Type: Issue

Category: Account

Subcategory: Account Access/Information



1. The standard solution light bulb will light up and change to blue when a category is chosen that has a standard solution assigned to it. The icon can be found on the right side of the toolbar.
2. Clicking the light bulb will display a list of possible solutions in order of the most commonly used.

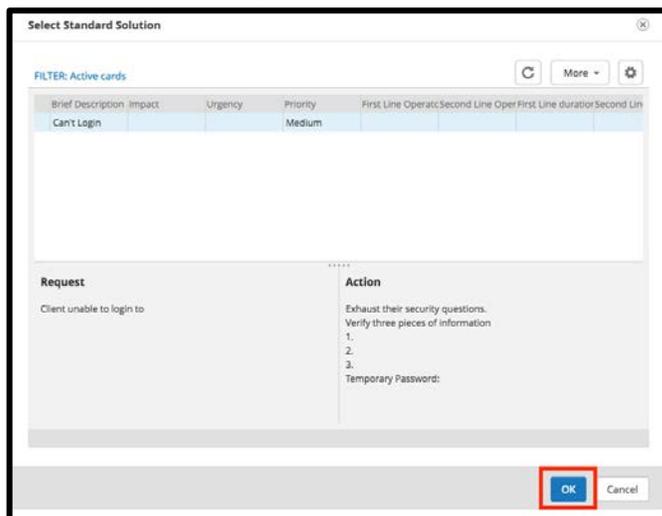


**Select Standard Solution**

FILTER: Active cards

Brief Description	Impact	Urgency	Priority	First Line Operatc	Second Line Oper	First Line duratio	Second Lin
Can't Login			Medium				

3. As you highlight each standard solution, the request details and actions that will be added to the open ticket are shown at the bottom of the window.



**Select Standard Solution**

FILTER: Active cards

Brief Description	Impact	Urgency	Priority	First Line Operatc	Second Line Oper	First Line duratio	Second Lin
Can't Login			Medium				

**Request**  
Client unable to login to

**Action**  
Exhaust their security questions.  
Verify three pieces of information  
1.  
2.  
3.  
Temporary Password:

OK Cancel

- To add this information to your current ticket, click **OK**.

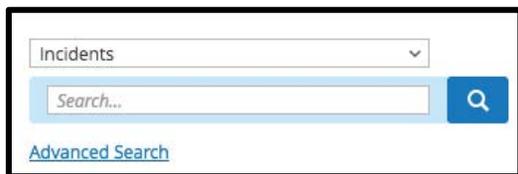
## Creating a Standard Solution

The option to create standard solutions will be available to team leaders and supervisors.

## Finding an Incident—Using Quick Finder

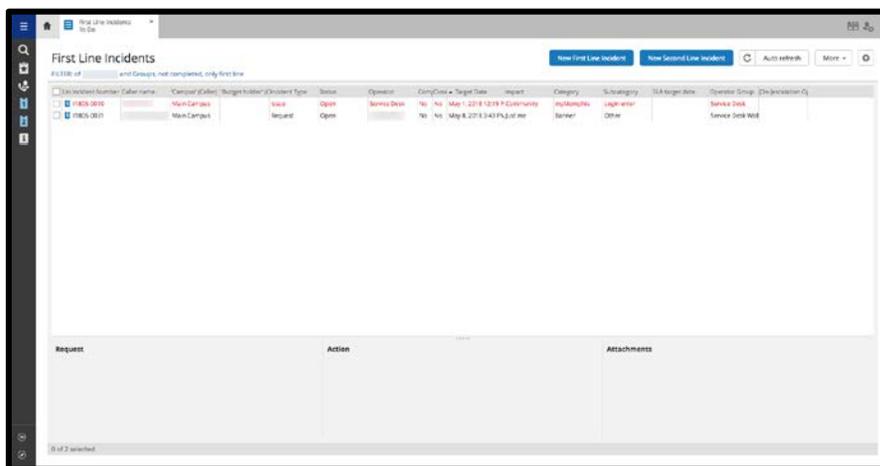
There are a variety of ways to locate an incident in TOPdesk, the most common are Quick Finder and Caller Cards.

- Quick Finder is located at the top of the Quick Launch bar .
- In the Quick Finder search list, select the process you would like to search (the most common is Incident).



- Common search criteria include, caller name, incident number, and operator name, but a variety of criteria can be used. Press enter or click the search button  to display your results.

- If you have searched using a full incident number the incident card will automatically be displayed. If you have used other criteria the search results are then displayed.



Selecting the check box next to the incident will display a preview screen below.

5. To open the incident for editing, select the A) check box next to the relevant line and click B) Select the Edit button from the drop-down menu.

*Note: You can also double-click on the ticket number to view and edit ticket.*

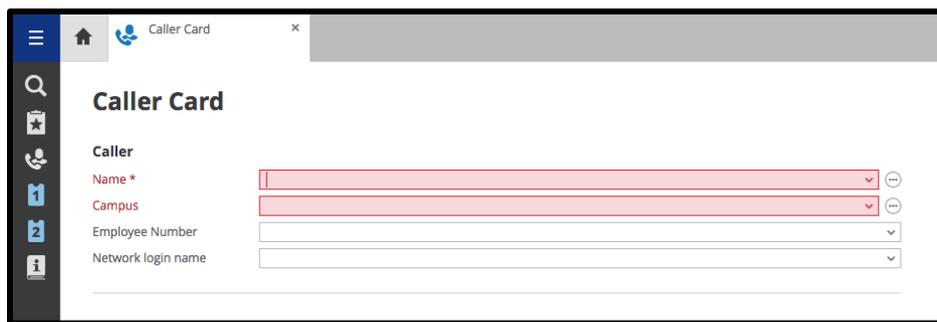
Lin Incident Number	Caller name	Campus (Caller)	Budget holder (C)	Incident Type	Status	Operator	Com	Close	Target Date	Impact	Category	Subcategory	S.A target date	Operator Group
11805-0010		Main Campus		Issue	Open	Service Desk	No	No	May 1, 2018 12:19 P	Community	myMemphis	Login error		Service Desk
11805-0031		Main Campus		Request	Open		No	No	May 8, 2018 3:43 P	Just me	Banner	Other		Service Desk Wa

6. Remember to Save any changes you have made to the incident and email the client if appropriate.

## Finding an Incident—Using Caller Card

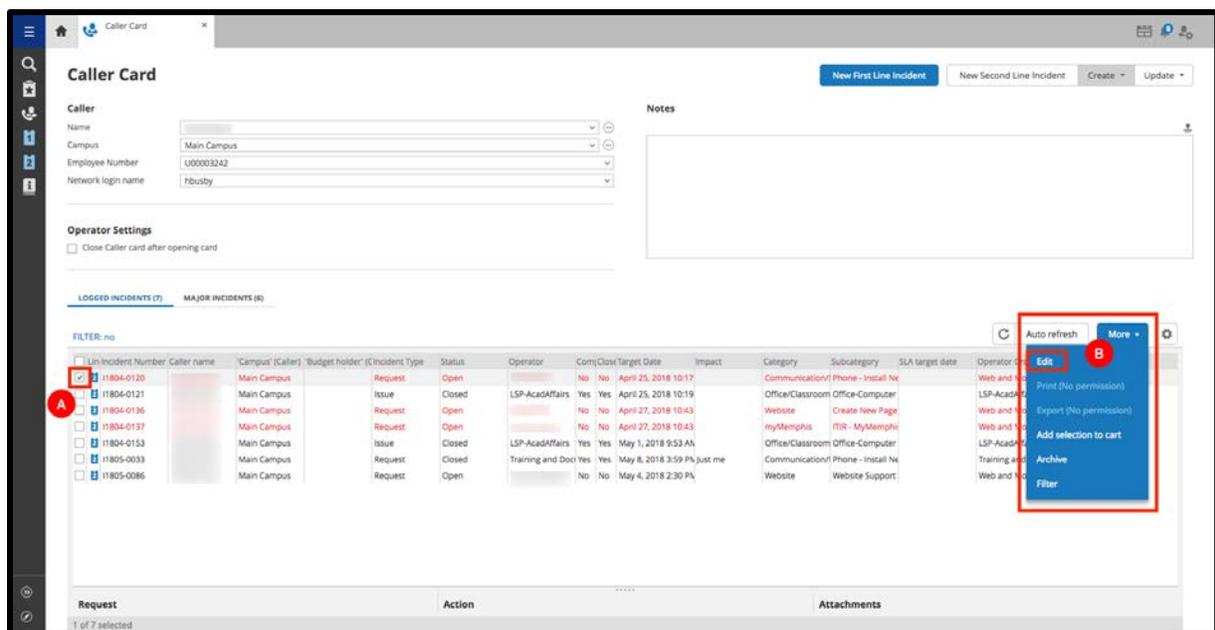
This method of searching will only work for clients who have LDAP accounts, you will be unable to search for unregistered callers in this way.

1. Click the Caller Card icon .
2. Enter either the caller's uuid, or Name, in the caller card - this uses LDAP and will auto-populate with other caller details.



3. Press Enter. A list of requests associated with the caller will be displayed below. Select the check box to see a summary of the information.
4. To open the incident for editing, select the A) check box next to the relevant line and click B) Select the Edit button from the drop-down menu.

*Note: You can also double-click on the ticket number to view and edit ticket.*



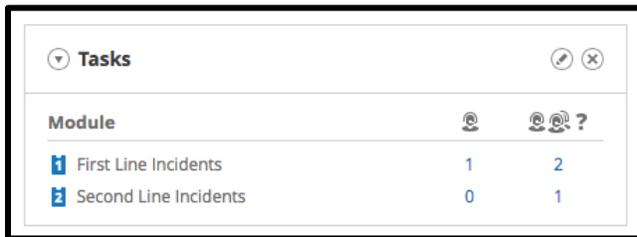
Lin	Incident Number	Caller name	Campus (Caller)	Budget holder	Incident Type	Status	Operator	Com	Close Target Date	Impact	Category	Subcategory	SLA target date	Operator
<input checked="" type="checkbox"/>	IT804-0120		Main Campus		Request	Open		No	April 25, 2018 10:17		Communication/ Phone - Install Ne			Web and
<input type="checkbox"/>	IT804-0121		Main Campus		Issue	Closed	LSP-AcadAffairs	Yes	Yes	April 25, 2018 10:19	Office/Classroom	Office-Computer		LSP-Acad
<input type="checkbox"/>	IT804-0136		Main Campus		Request	Open		No	April 27, 2018 10:43		Website	Create New Page		Web and
<input type="checkbox"/>	IT804-0137		Main Campus		Request	Open		No	April 27, 2018 10:43		myMemphis	ITIR - MyMemphi		Web and
<input type="checkbox"/>	IT804-0153		Main Campus		Issue	Closed	LSP-AcadAffairs	Yes	Yes	May 1, 2018 9:53 AM	Office/Classroom	Office-Computer		LSP-Acad
<input type="checkbox"/>	IT805-0033		Main Campus		Request	Closed		Yes	Yes	May 8, 2018 3:59 PM just me	Communication/ Phone - Install Ne			Training and
<input type="checkbox"/>	IT805-0086		Main Campus		Request	Open		No	May 4, 2018 2:30 PM		Website	Website Support		Web and

5. Make any changes necessary and click Save.

## Viewing & Opening Tickets Assigned to You or Your Department

Tickets 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 incidents which are unassigned. The left column displays the tasks assigned specifically to you.

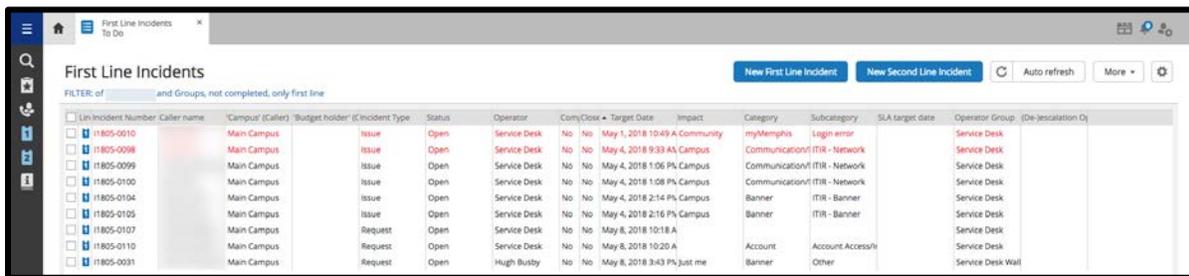


Module		  ?
 First Line Incidents	1	2
 Second Line Incidents	0	1

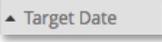
The layout of the Tasks overview can be edited and customized using the Edit button .

*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 incidents click the number shown, the Tasks list is then displayed.



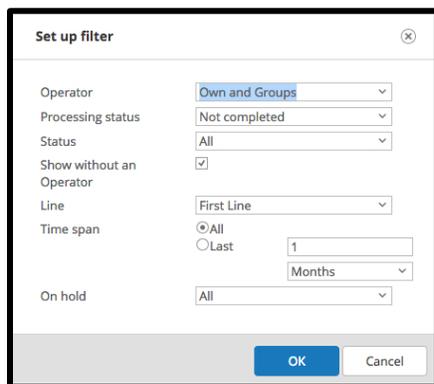
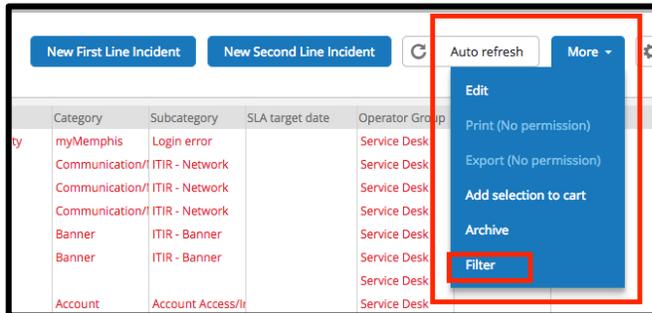
Lin Incident Number	Caller name	'Campus' (Caller)	'Budget holder' (Incident Type)	Status	Operator	Com/Close	Target Date	Impact	Category	Subcategory	SLA target date	Operator Group	(De-escalation O)
<a href="#">11805-0010</a>		Main Campus	Issue	Open	Service Desk	No	May 1, 2018 10:49 A	Community	myMemphis	Login error		Service Desk	
<a href="#">11805-0098</a>		Main Campus	Issue	Open	Service Desk	No	May 4, 2018 9:33 A	Campus	Communication/ITR - Network			Service Desk	
<a href="#">11805-0099</a>		Main Campus	Issue	Open	Service Desk	No	May 4, 2018 1:06 P	Campus	Communication/ITR - Network			Service Desk	
<a href="#">11805-0100</a>		Main Campus	Issue	Open	Service Desk	No	May 4, 2018 1:08 P	Campus	Communication/ITR - Network			Service Desk	
<a href="#">11805-0104</a>		Main Campus	Issue	Open	Service Desk	No	May 4, 2018 2:14 P	Campus	Banner	ITIR - Banner		Service Desk	
<a href="#">11805-0105</a>		Main Campus	Issue	Open	Service Desk	No	May 4, 2018 2:14 P	Campus	Banner	ITIR - Banner		Service Desk	
<a href="#">11805-0107</a>		Main Campus	Request	Open	Service Desk	No	May 8, 2018 10:18 A					Service Desk	
<a href="#">11805-0110</a>		Main Campus	Request	Open	Service Desk	No	May 8, 2018 10:20 A		Account	Account Access/		Service Desk	
<a href="#">11805-0031</a>		Main Campus	Request	Open	Hugh Busby	No	May 8, 2018 3:43 P	Just me	Banner	Other		Service Desk Wall	

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 that 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.

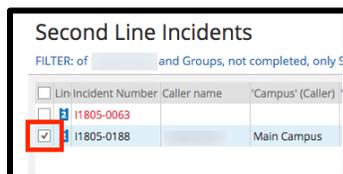
Selecting the check box at the end of an incident line will display an incident summary at the bottom of the screen.

- 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.

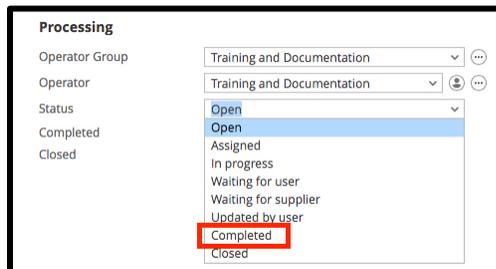
- To open and edit the incident card, check the box at the beginning of the line and choose edit button from the drop-down menu, the incident card is then loaded in a new tab.



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

## Resolving/Completing an Incident

1. When an Incident has been finished, you will need to ensure the ticket is completed.
2. Open the Incident and select Completed from the Status drop down. The incident will then automatically date and time stamp the end of the ticket.



**Processing**

Operator Group: Training and Documentation

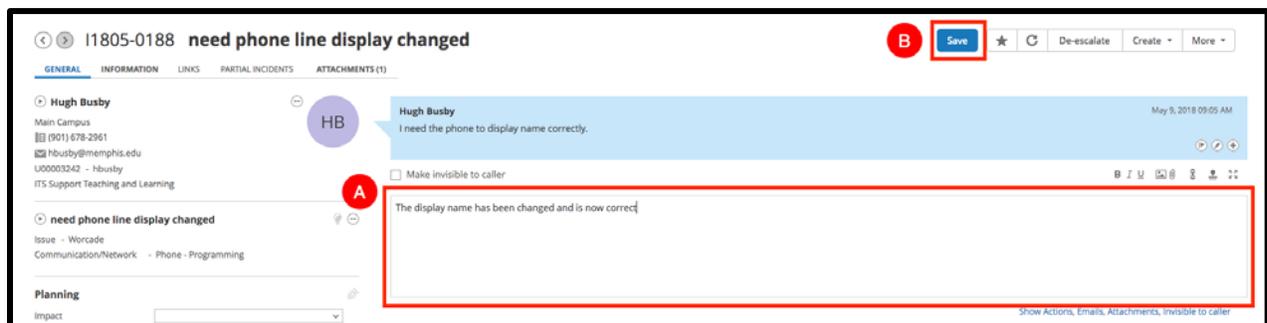
Operator: Training and Documentation

Status: **Completed**

Completed

Closed

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



I1805-0188 **need phone line display changed**

**Hugh Busby**  
Main Campus  
(901) 678-2961  
hbusby@memphis.edu  
U000032-02 - hbusby  
ITS Support Teaching and Learning

Hugh Busby  
I need the phone to display name correctly.  
May 9, 2018 09:05 AM

Make invisible to caller

**A** The display name has been changed and is now correct

**B** Save

De-escalate Create More

GENERAL INFORMATION LINKS PARTIAL INCIDENTS ATTACHMENTS (1)

**need phone line display changed**  
Issue - Worcade  
Communication/Network - Phone - Programming

Planning  
Impact

Show Actions, Items, Attachments, Invisible to Caller

4. An email will then be automatically sent to the caller confirming the Incident is completed and asking them to complete a short survey. If the caller responds to this email it **WILL NOT** reopen the ticket automatically, if further assistance is required, you will need to open the ticket and change the status to In Progress.
5. If the caller does not respond to the resolved incident email, the Incident will remain closed.  
If the caller responds to the closed incident, a new incident will be raised in response to the reply to the closed incident.

## Escalating an Incident to Second Line

All tickets will have a respond by date/time depending on the **Impact** and **Urgency** assigned to it, when a ticket is nearing or has exceeded its target date you will receive an automatic email to warn you of this, and the ticket may need to be escalated to a Second Line ticket.

1. If a ticket cannot be handled by First Line, it is escalated to a Second Line incident (Second Line incidents can be created and owned by Service Desk and ITS team members.)
2. Open the ticket (if it's not already open).
3. To Escalate, click **Escalate**. To De-escalate, click **De-escalate**.



4. You may then need to reassign the ticket to another operator group or operator. You will only be able to escalate the ticket to Operator Groups who are included in Second Line support. You should include information in the Action Section (Invisible to caller if appropriate) so that the group you are assigning the ticket to has all the information needed and understands why you are escalating the ticket.
5. Click Save.

*Note: Second Line Operators also have the option to De-Escalate a ticket if required.*

## Requesting a New/Change to a Knowledge Base Article

We will be using the TOPdesk knowledge base to link to web sites, wiki pages, help guides, etc. Follow one of the procedures below to request a new AskTom knowledge base article or an amendment to an existing article.

1. If the information already exists on a web page, wiki page, etc., send the web address to: [umtech@memphis.edu](mailto:umtech@memphis.edu)
2. If the information does not already exist, please create the content/copy an article for the content and email it to: [umtech@memphis.edu](mailto:umtech@memphis.edu)  
The ITS Service Desk will then work with you to setup the information in an appropriate location and create a knowledge base article to point to it.
3. If you wish a knowledge base article to be amended, please send the corrections to: [umtech@memphis.edu](mailto:umtech@memphis.edu).

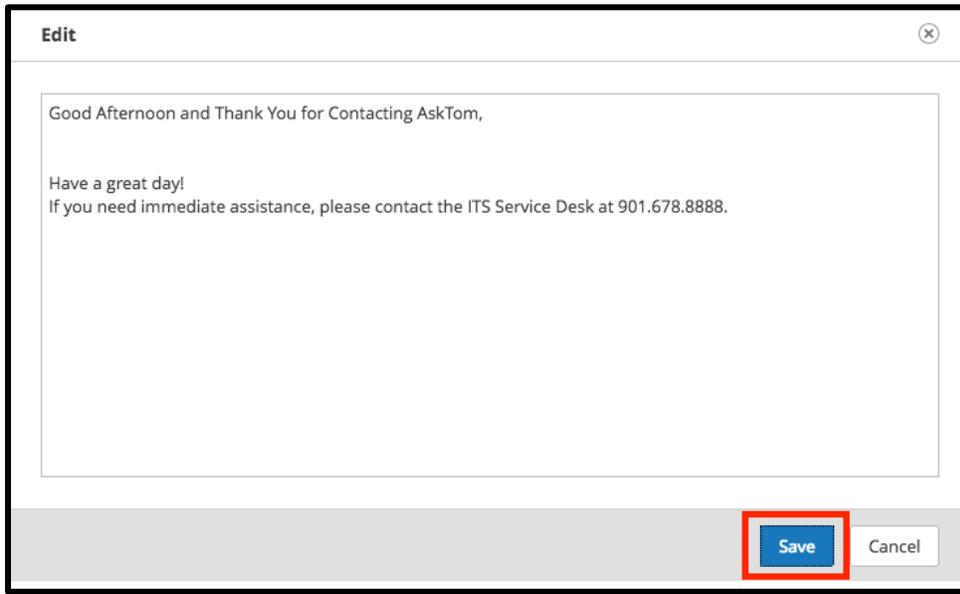
## Creating Default Text

When working within TOPdesk you may find that there is text that you use within an Incident frequently. To save time, you can save the text and use it again in future tickets. Default text is different from a standard solution in that it is operator-specific so nobody else will be able to access the default text you create.

1. Default text is created from within an Incident but will then be available to the operator for all other Incidents.
2. Click on the Add default text button in the action field . The default text window will appear allowing you to create up to 9 sets of default text.



3. Click the edit button  on one of the empty boxes (you can also use this button to edit existing text).
4. In the default text box, enter the text you wish to use (up to 50,000 characters) and click Save.



Good Afternoon and Thank You for Contacting AskTom,

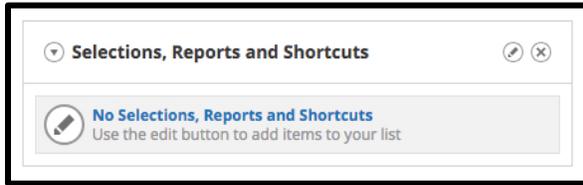
Have a great day!  
If you need immediate assistance, please contact the ITS Service Desk at 901.678.8888.

Save Cancel

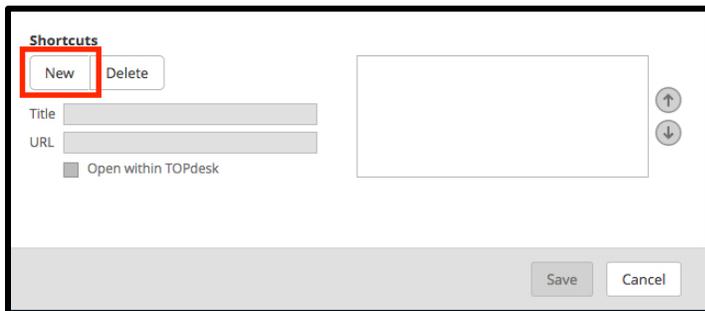
5. To use the text, click the box containing the default text and it will automatically be added to the action area of the Incident.  
*Note: The action box can still be edited and the default text can be added to if needed.*

## Quick Launch Bar

You can add buttons to the Quick 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 top right of the Quick Launch Bar.
2. To add a new Shortcut, click on New to add new shortcut Icon. Complete the Title and URL fields.



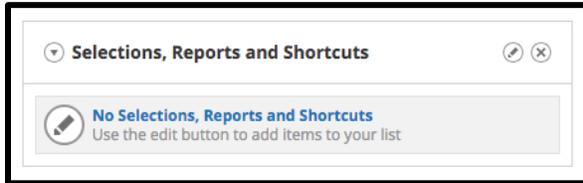
3. Click Save. The shortcut will be created and displayed as  .  
*Note: Shortcuts created can be edited at any time.*

## Adding Selections, Reports and Shortcuts to Quick Launch Bar

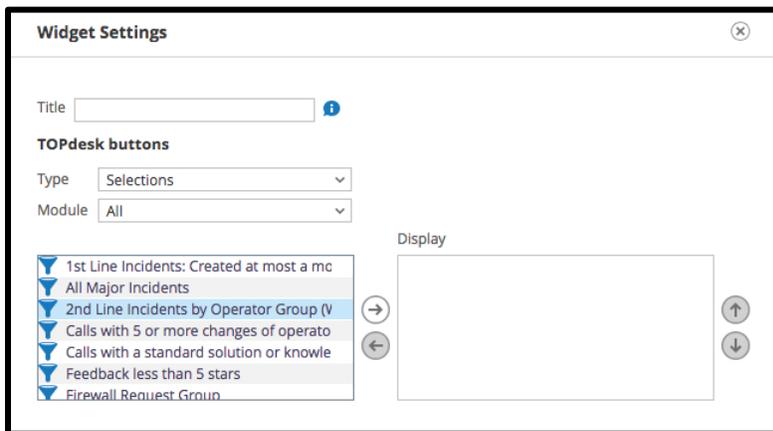
Selections, reports and shortcuts can be customized on a per operator basis allowing quick access to information required.

### Customizing

1. From the Selections, Reports and Shortcuts Widget click the edit button  .



2. To add a button, use the drop downs and selection arrows to personalize the filters and click Save.



3. Existing shortcuts and buttons can be edited and deleted using the Edit  and delete  buttons. To delete a TOPdesk button you need to move it from the display list by clicking the left-facing arrow.