

Top Desk for Operators

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Purpose

This training material highlights how to manage, create, and understand incident and service requests in the new TOPdesk ticket system.

Audience

University of Memphis staff responsible for entering and managing incident and service requests with in TOPdesk.

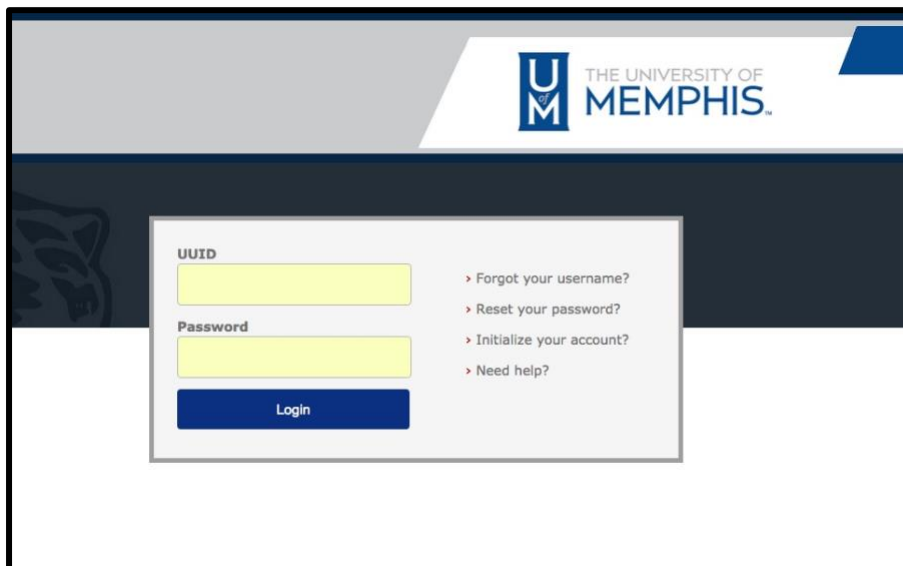
Getting Started

Logging into the System

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

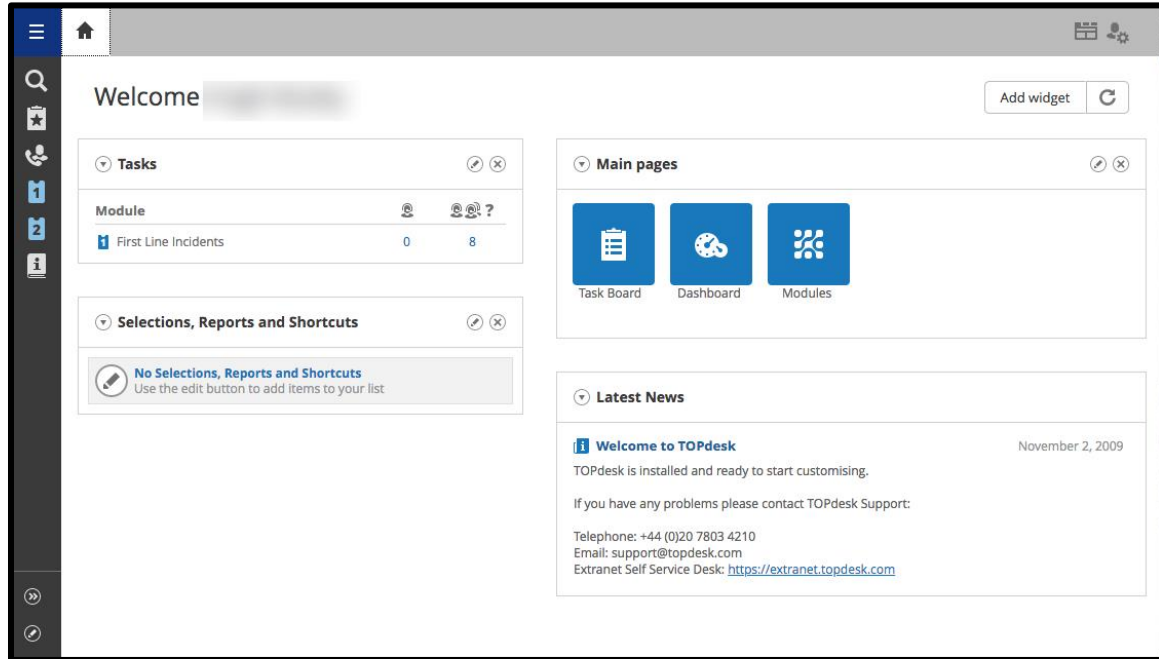


2. Login with your **UUID** and **password**. (The *UUID* and *password* is the same one you use for myMemphis Portal and all other campus resources.) Click **Login**, then authenticate with DUO.



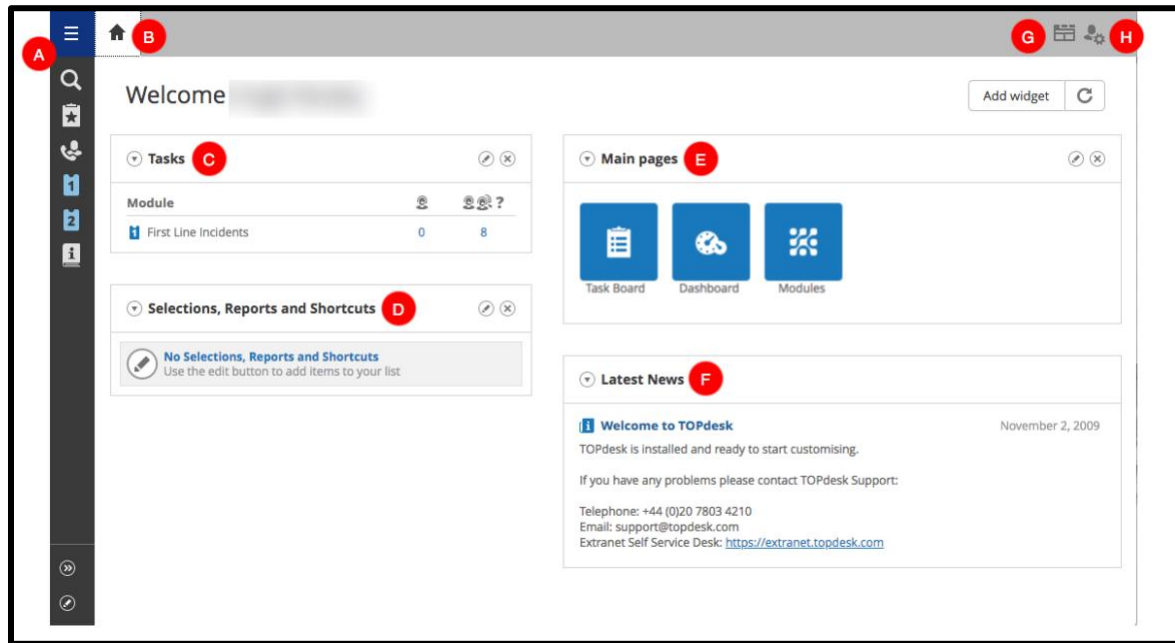
The opening screen is your personal TOPdesk workspace.

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




Basic Layout:






The key parts of the standard TOPdesk workspace are as shown below:






The areas/items labeled in the picture (default layout) are:


- A. **Quick Launch Bar:** Contains icons for the features in TOPdesk you use most frequently, such as creating a new incident, service request, etc. You can add buttons to the Quick Launch Bar using  .


The standard buttons are:

-  **TOPdesk menu:** Create new incidents and open the *Plan Board*, *Task Board*, *Dashboard*, the *Modules* and *Help* options.
-  **Search:** Search within TOPdesk, for example, Incidents, service requests, and AskTom Articles.
-  **Bookmarks:** These can be used to bookmark cards and create a mini to do list or to quickly find a ticket.
-  **Caller Card** - This can be used to look users in the TOPdesk system.
-  **New First Line Incident** - Used to log a ticket as a new first line incident. These will be assigned to Service Desk.




-  **New Second Line Incident** - Use to log a ticket as a Second Line Incident. LSP's and other user groups can own second line incidents.
-  **AskTom** - Used for looking up common solutions in the knowledge base.

B.  **"Home" button:** Takes you back to the start page at any time.

C. **Tasks:** Contains all of the incidents for your area. Adjust to display the tasks most important to you. Choose how you wish to filter these columns using .

D. **Selections, Reports and Shortcuts:** Provides access to selections, reports and shortcuts that are most relevant to you. You can choose which selections, reports and shortcuts you wish to display here using .

E. **"Main Pages":** Contains the following buttons:

-  **Plan Board:** This is used by TOPdesk operators for allocation of work.
-  **Task Board:** This button opens the overview of all tasks assigned to you. You can use it to view tickets that you need to process.
-  **Dashboard:** This displays reports providing an overview of the current service requests. You can also create new reports and selections through the dashboard.

Each new action will open a new tab across the top of your screen to help you easily navigate to the information you need. You can have 10 tabs open at the same time and easily switch from one to another.

F. Latest News: Information on current service status, upcoming maintenance and other useful information.

G. Tab Button - you can view a list of all open tabs using the Tab button.

H. “Logout” and “My Settings” buttons: The **My Settings** button allows the user to change some custom settings such as display options, adding additional email addresses, to-do lists for groups to display, and language settings. The **Logout** button allows you to log out of the system.

Working with Tabs

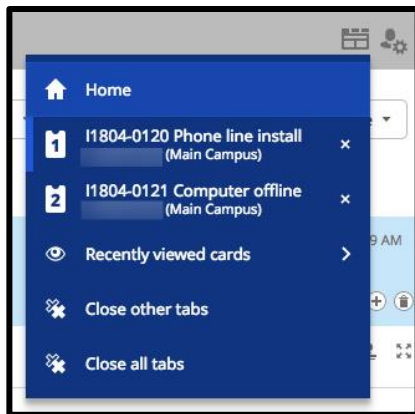
In TOPdesk, you work with tabs. Actions will open additional tabs across the top of your screen. You can open 10 tabs at once and easily switch between them:



- A. **Home Page:** The home or start page tab is always open to the left of the open tabs and will take you back to your workspace window.
- B. **Tabs:** If you have many tabs open, you can view a list of all open tabs using the



button. This also allows you to close all open tabs at once. You will see all other tabs except for the one you are currently working on (and the start page tab) The **Tab** button and also provides to access Recently viewed tickets:

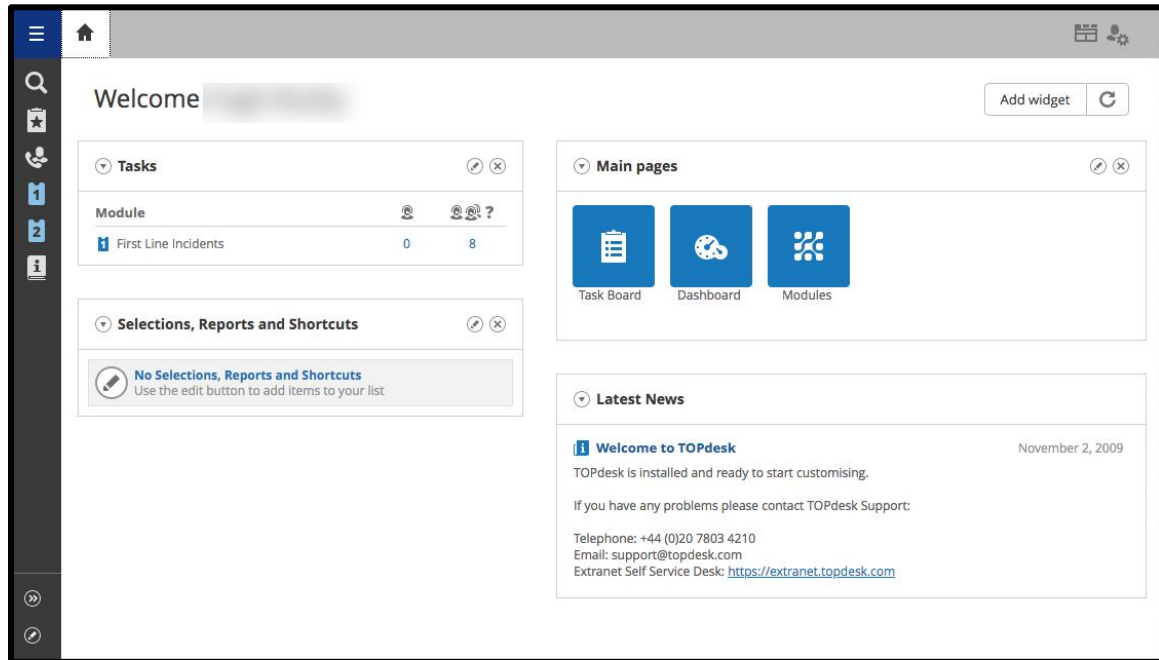


A few useful points:

- **Tab Space:** If the number of tabs open exceeds the space allowed by your browser, arrows will appear to allow you scroll through the tabs.
- **Opening Tickets:** If you open a ticket which is already open, the tab with that card will display at the front.
- **Maximum Number of Tabs:** You can open up to 10 tabs at one time, if you open an eleventh tab, the tab which has been unused for the longest will close to allow the new tab to open.
- **Recently Closed Tickets:** TOPdesk will remember the last 30 viewed tickets.

Customizing TOPdesk

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




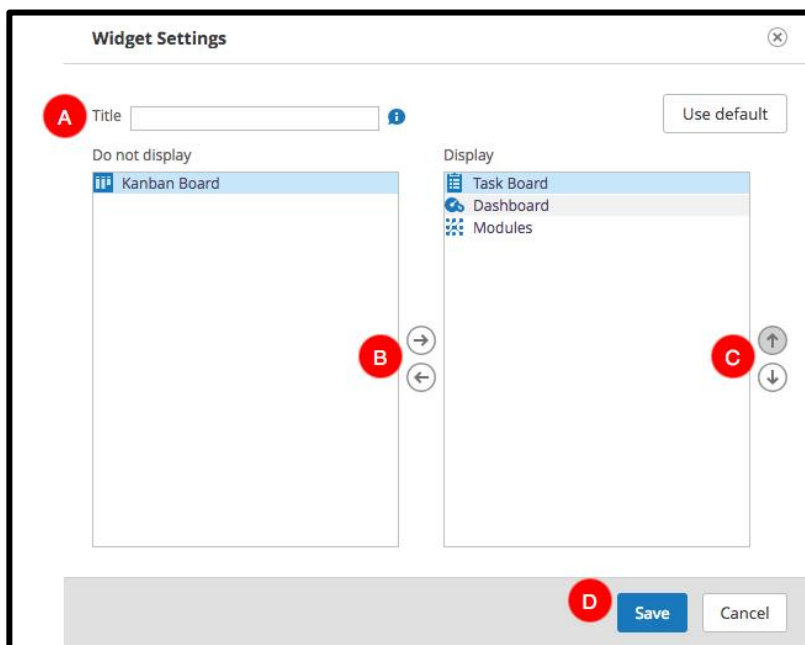
Customizing Your Workspace

The Main pages window can be customized on a per operator basis. You can drag and drop 'widgets', add new widgets, and change the way your tasks are displayed.

Adding, Moving and Deleting Main Page Widgets



1. To change the order of your widgets, click on the Edit button .
2. Available widgets will be listed on the left side. **A)** You can Name your Widget area here. **B)** Highlight the widget you want to display and use the left/right arrow buttons to add or remove widgets in the Display column. **C)** Highlight the widget you would like to change order of and use the up/down arrow buttons to organize the order in which they are displayed. Once you have made your choices **D)** Click **Save**.

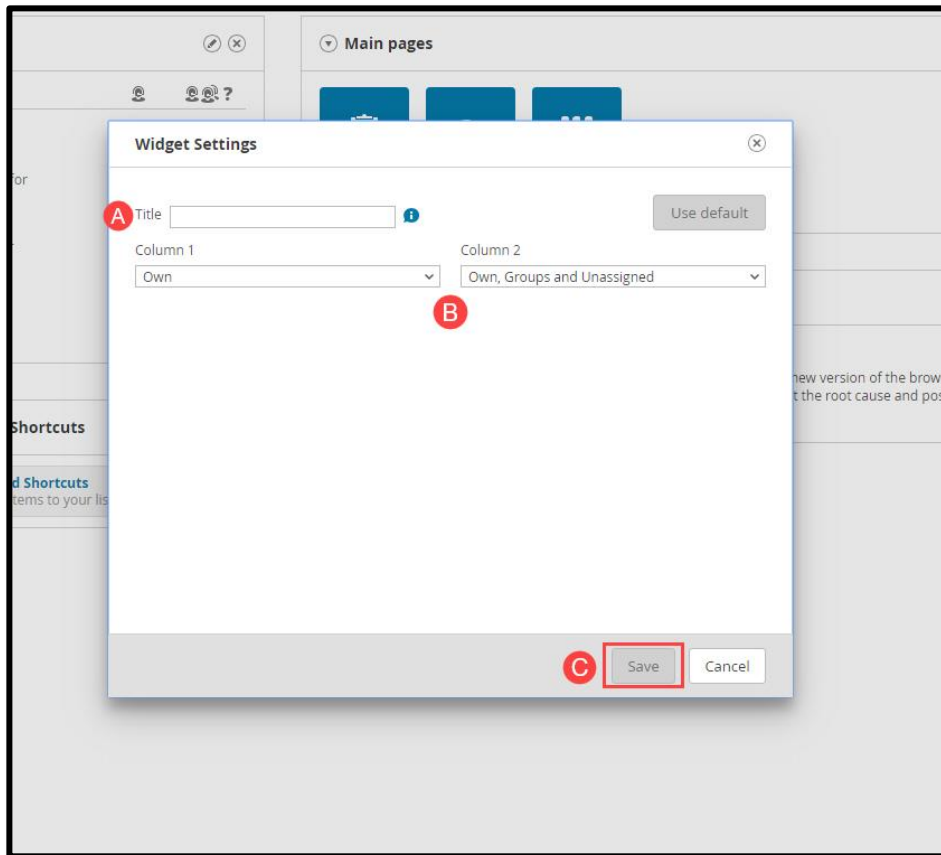


Tasks

1. Click on the *Edit icon*  in the Tasks widget.
2. The *Tasks Widget Settings* will open.




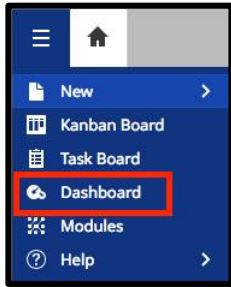
3. From here, you can **A)** rename your Task Widget **B)** and select the incidents you wish to see in these columns from the drop-down search lists, under **Column 1** and **Column 2**.



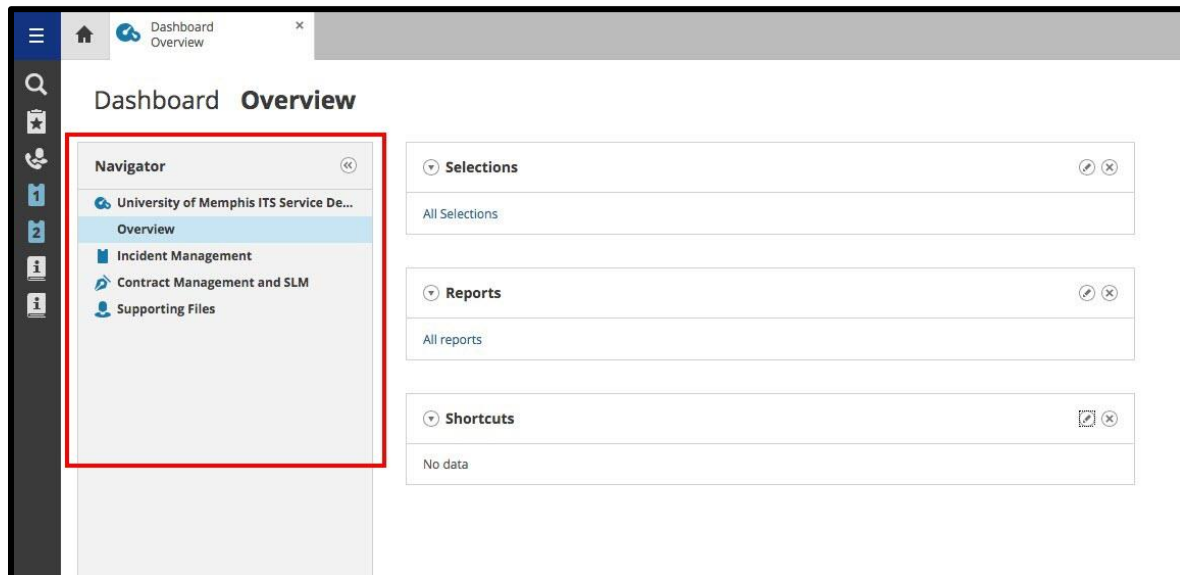
4. **C)** Click Save. Your start page will now display the incidents you have selected to view.


Customizing Dashboard

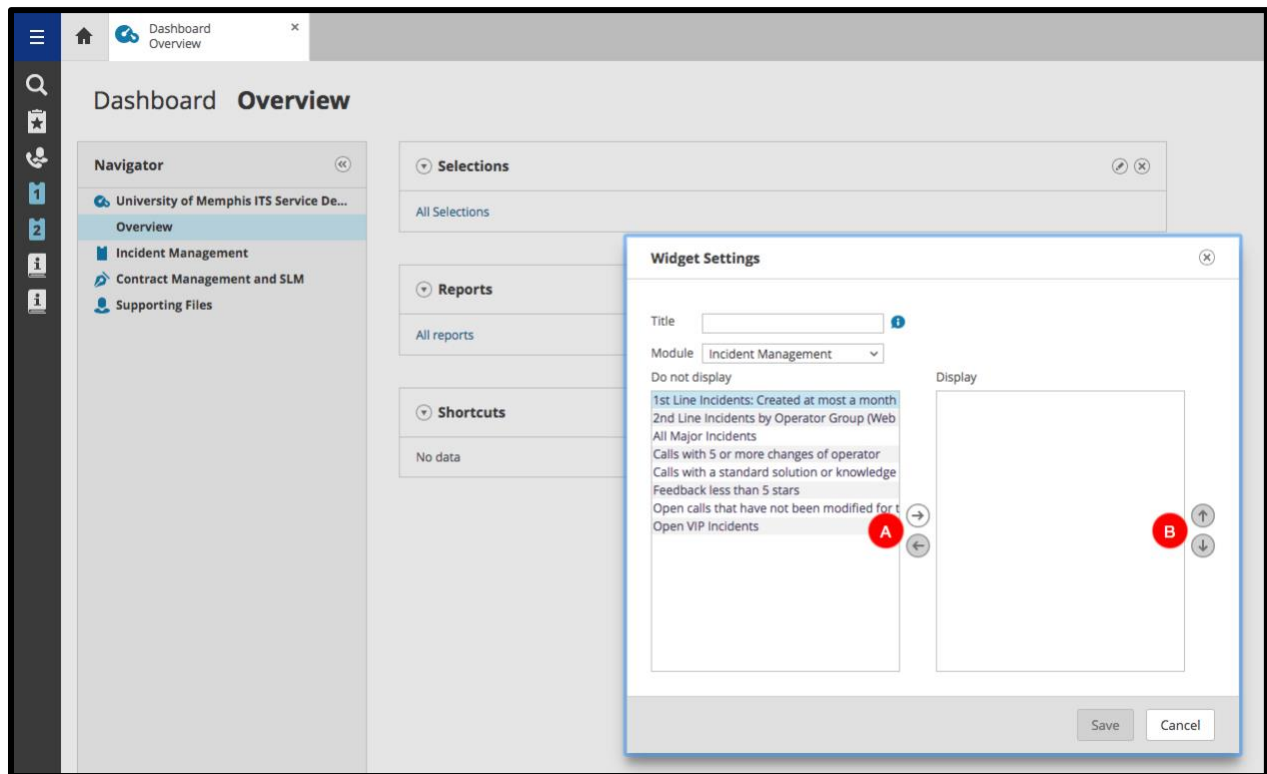
1. Click the 'TOPdesk Menu' icon on the main page . Select Dashboard from the drop-down menu.



2. In the Navigator pane, click **Overview** to see a general overview or click on each module (e.g., Incident Management) to see a more detailed overview.




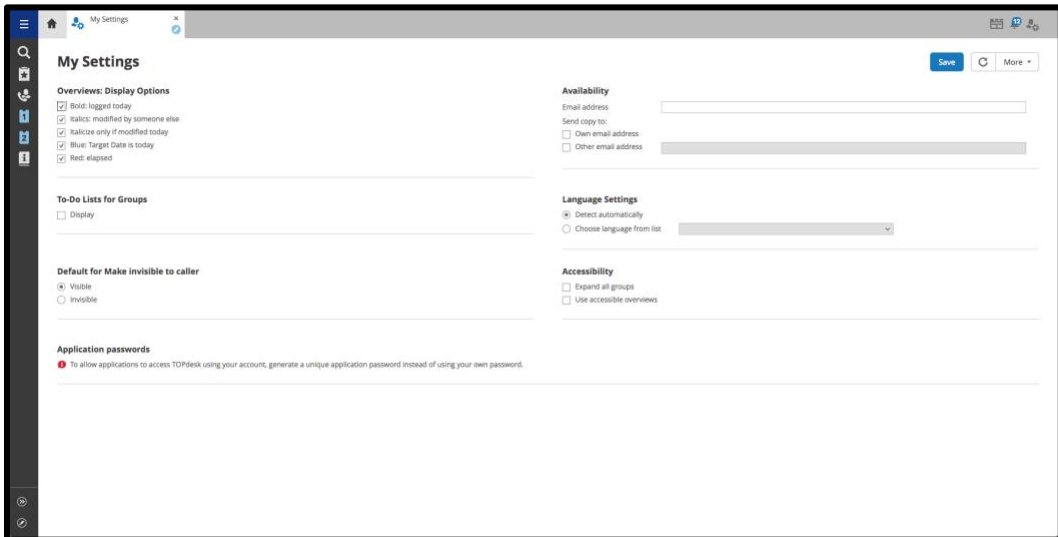
3. Additional items can be added to Selections, Reports and Shortcuts by clicking the edit button . A) Highlight what widget you want to display and use the left/right arrow button to add or remove widgets in the Display column. B) Use the up/down arrow button to choose order.



Adjusting User settings

The **My Settings** button allows the user to change some custom settings such as display options, adding additional email addresses, to-do lists for groups to display, and language settings.

1. Click on  in the top right corner and select **My Settings**.
2. Useful options to select here include:
 - Bold Logged Today.
 - Italics: modified by someone else.
 - Italicize only if modified today.
 - Blue: Target Date is today.
 - Red: Elapsed (task is overdue).



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.

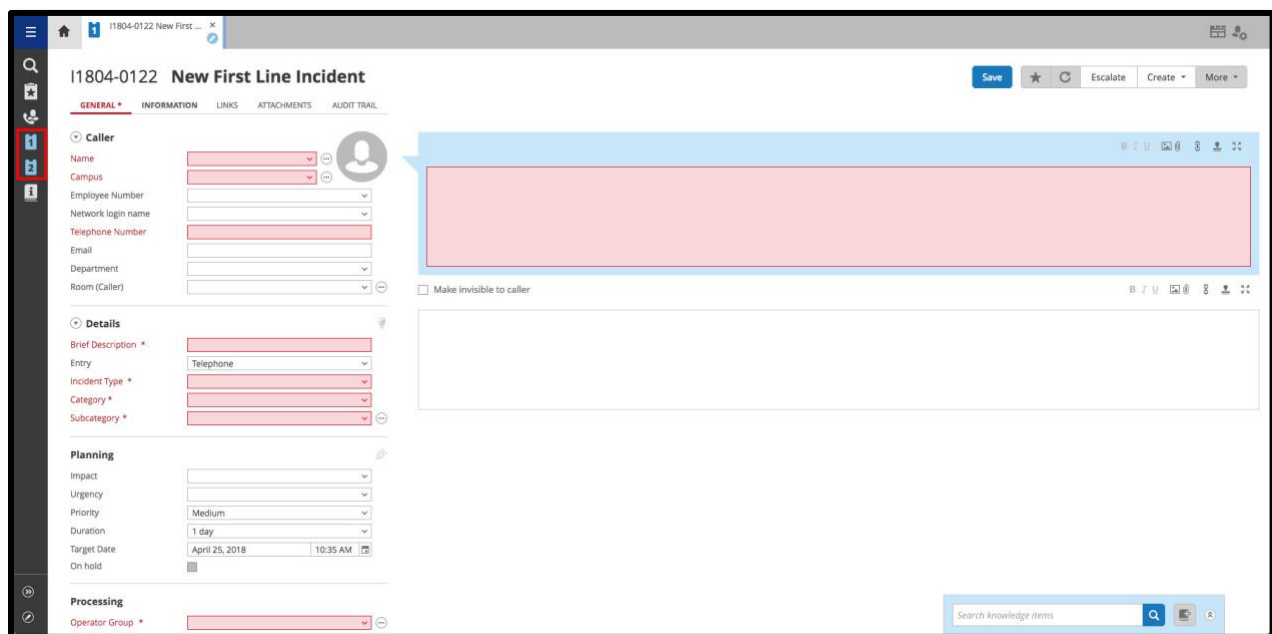
Note: Only if you have the shortcut.

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.

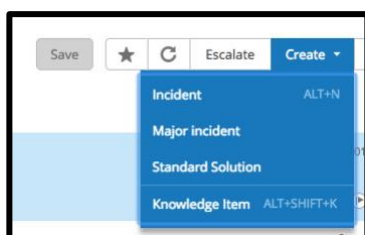
Audit Trail: Each ticket has a specific set of audited items such as changing/adding details or changing assignee all of which are date and time stamped.

Incident/Card Toolbar

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

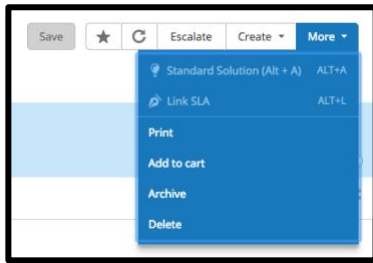


- A. Save the ticket - Click to save a ticket.
- B. Bookmark - Click to Bookmark a ticket.
- C. Reload data - Click to reload data on a page.
- D. Escalate or De-escalate a ticket from First Line to Second Line
- E. Create - Create button allows you to create the following:



- 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

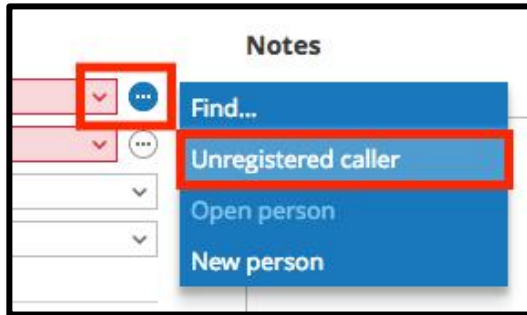
TT

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, username, 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 several 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**.



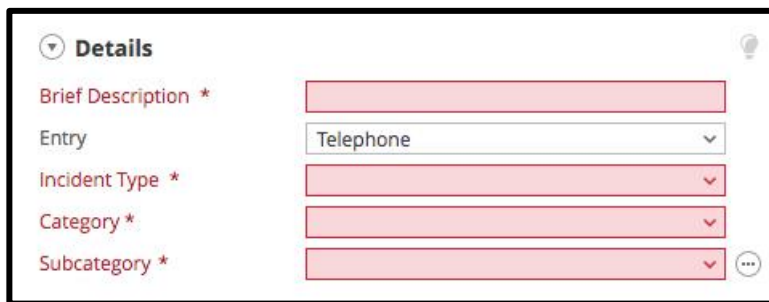
In this case you will need to fill in the caller details/contact information manually.

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



Brief Description: Provides a summary of the incident.

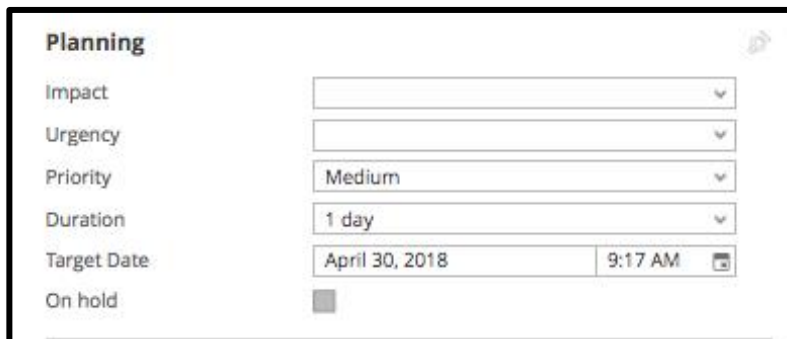
Incident Type: Categorizes incidents from the following options.

- **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.

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

Planning



Planning

Impact

Urgency

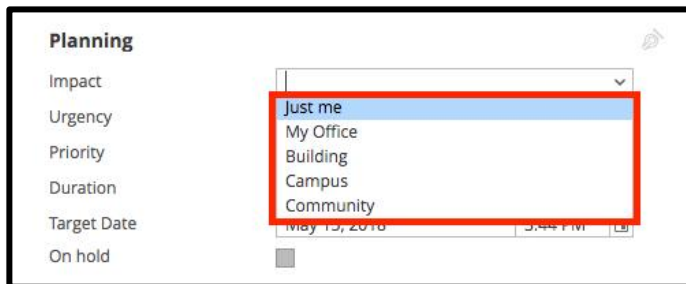
Priority

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

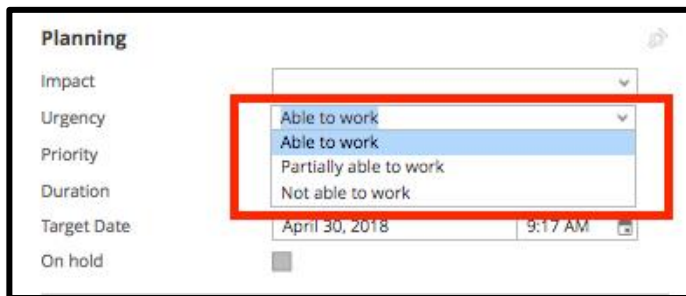
Priority

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.

The screenshot shows the 'Planning' section of a form. The 'Priority' dropdown menu is open, displaying a list of options: Medium, VIP, Critical, High, Medium (highlighted), Low, and Long term. A red rectangle highlights the dropdown menu.

Duration: This is determined by the Priority.

The screenshot shows the 'Planning' section of a form. The 'Duration' dropdown menu is open, displaying a list of options: 1 day (highlighted), 15 minutes, 30 minutes, 1 hour, 2 hours, 4 hours, 1 day (highlighted), 2 days, 3 days, 4 days, and 1 week. A red rectangle highlights the dropdown menu.

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

The screenshot shows the 'Planning' section of a form. The 'Target Date' field is pre-populated with 'May 2, 2018' and '10:51 AM'. A red rectangle highlights the 'Target Date' field.

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.

The screenshot shows the 'Planning' section of a form. The 'On hold' field is highlighted with a red rectangle. The field is currently empty.

Processing Area



Processing

Operator Group: Service Desk

Operator: Service Desk

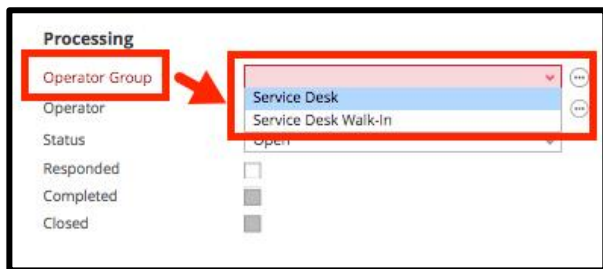
Status: Open

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: ☐

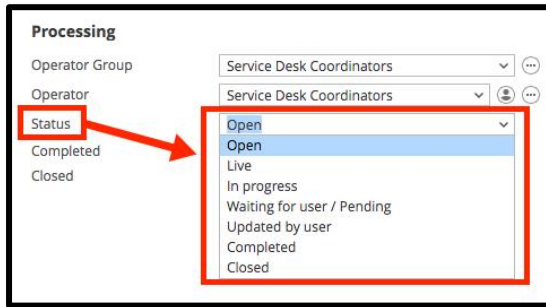
Closed: ☐

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 web form titled "Processing". It has several fields: "Operator Group" (set to "Service Desk Coordinators"), "Operator" (set to "Service Desk Coordinators"), "Status", "Completed", and "Closed". The "Status" field is highlighted with a red box, and a red arrow points to its dropdown menu. The dropdown menu is open, showing a list of status options: "Open", "Open", "Live", "In progress", "Waiting for user / Pending", "Updated by user", "Completed", and "Closed". The first "Open" option is highlighted in blue.


- **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

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.

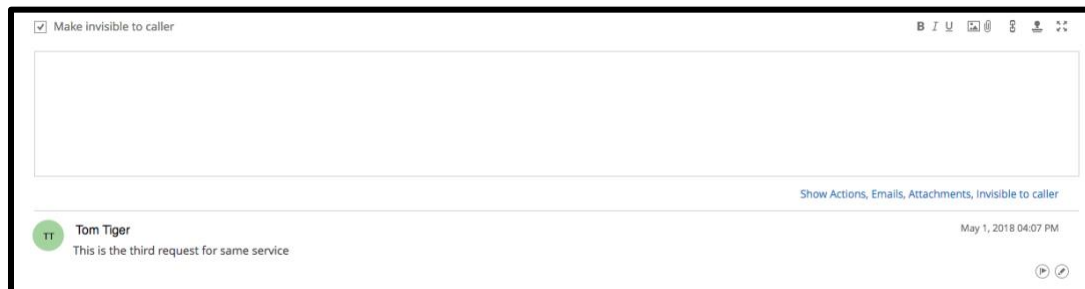
Action Area

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 .

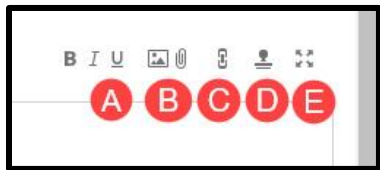
Make Invisible for caller: This can be used to make notes within the Incident for either yourself or another operator group.

Saving the Ticket: The ticket can then be saved by clicking  , the ticket is then assigned a ticket number for example “118-0000126” this is made up of “1” indicating this is an incident, “18” which shows the year logged and “0000126” which is the ticket number.

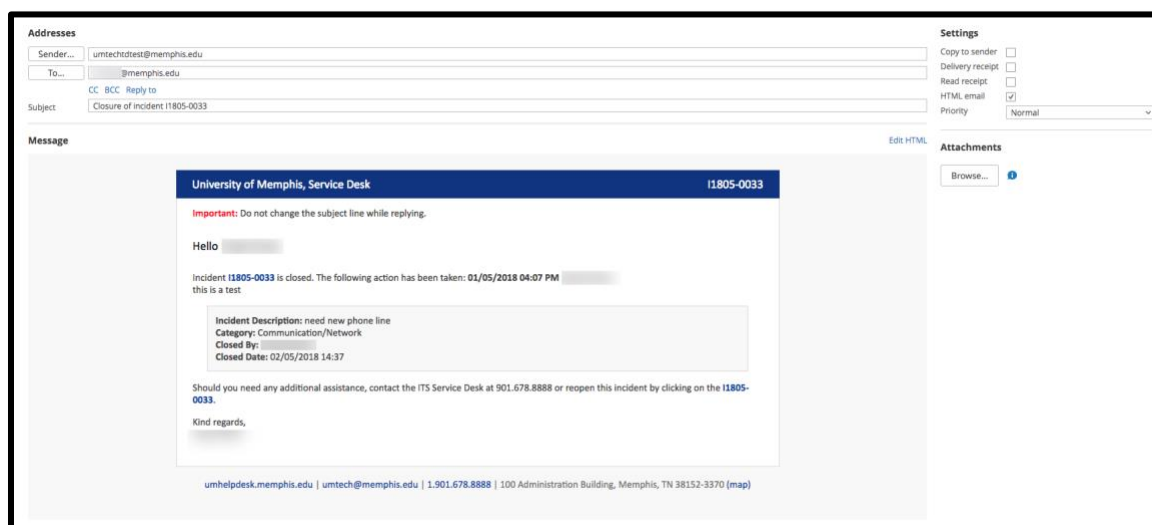
Once the ticket has been saved, the actions are date and time stamped and are displayed with the most recent action appearing just under the New Action area.



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.



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.

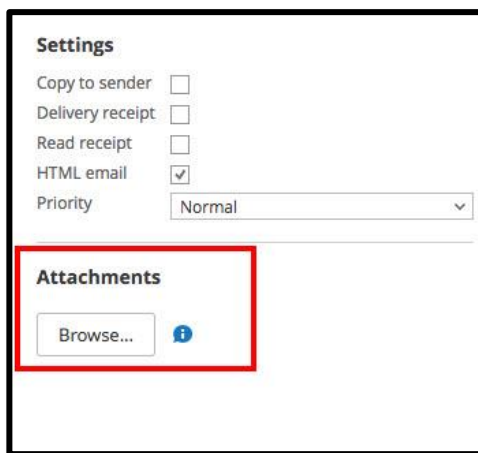
Attaching Files to an Email



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).



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 . If for any reason you do not wish to send the email, click .

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:

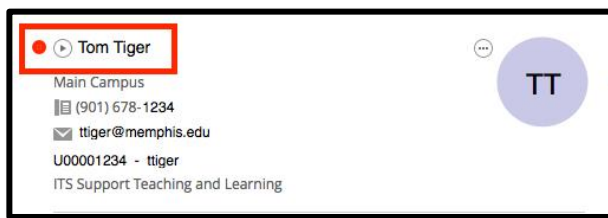
- **Red Fields:** Indicate mandatory fields.
- **Caller Name:** Enter the person's UUID in the **Network Login Name** field rather than entering their name.
- **Changing Caller Name:** If you select the incorrect person, click in the name field and retype the correct name.

- **Contact Information:** Caller details should not be edited as they will be 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.

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.

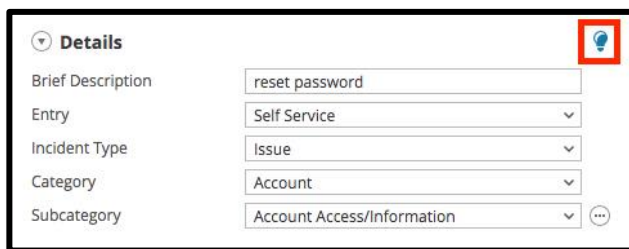
1. When a VIP client is selected in a ticket, a small red circle will appear next to his/her name:



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

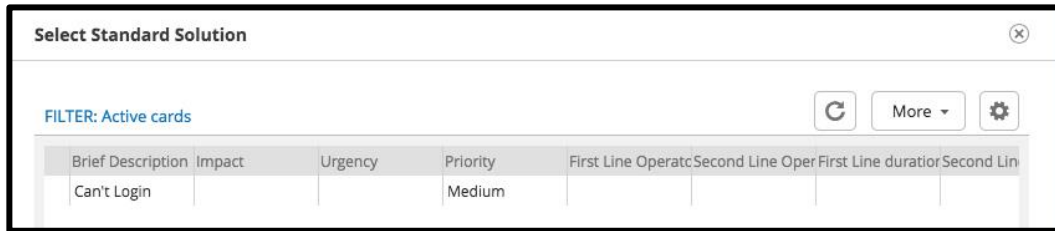
Using a Standard Solution to Resolve an Incident

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




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.

- Clicking the light bulb will display a list of possible solutions in order of the most commonly used.



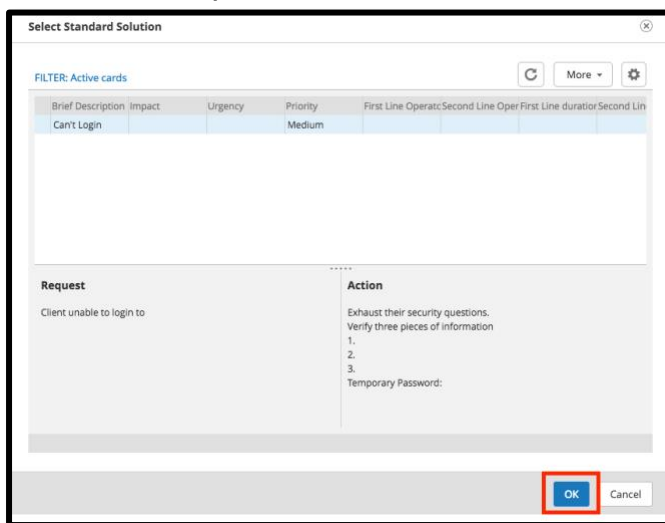
Select Standard Solution

FILTER: Active cards

Buttons: Refresh, More, Settings

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

- 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

Buttons: Refresh, More, Settings

Brief Description	Impact	Urgency	Priority	First Line Operatc	Second Line Oper	First Line duration	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:

Buttons: OK, Cancel


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

Creating a Standard Solution

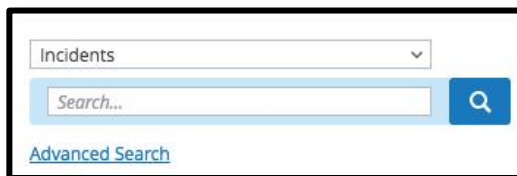
The option to create standard solutions will be available to team leaders and supervisors.


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.

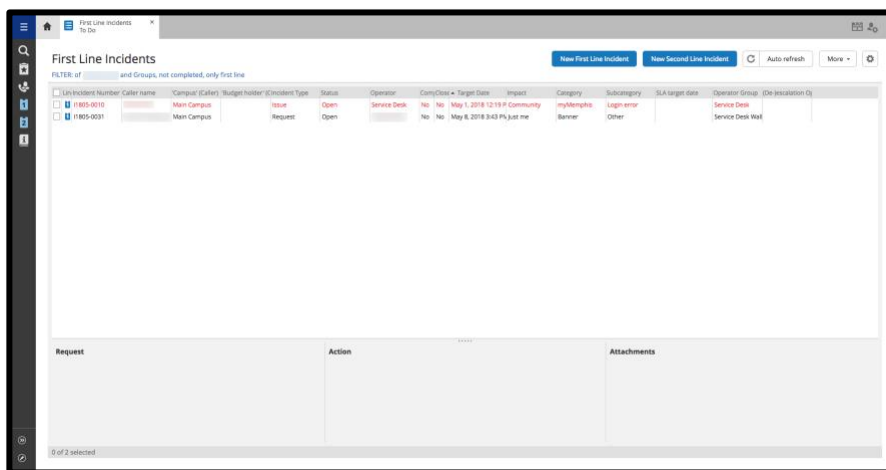
1. Quick Finder is located at the top of the Quick Launch bar  .

2. In the Quick Finder search list, select the process you would like to search (the most common is Incident).



3. 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 .

4. 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.

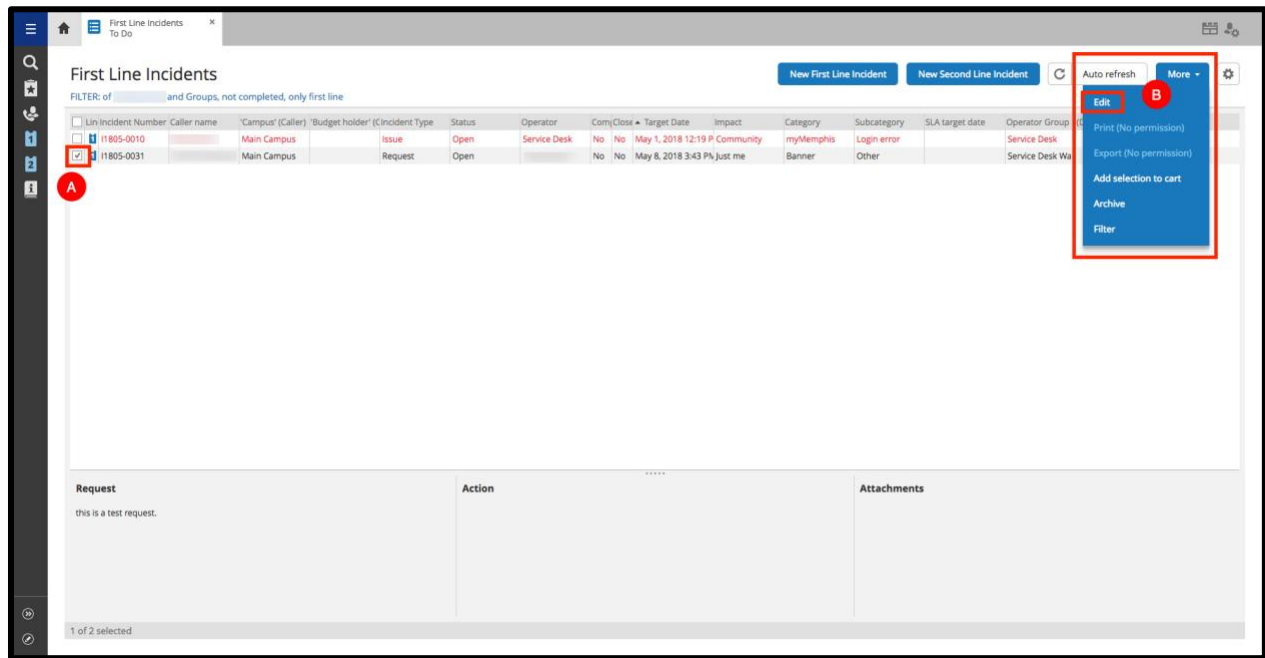


Incident Number	Caller Name	Campus	Status	Operator	Category	Subcategory	SLA target date	Operator Group	On location
1805-0010	Main Campus	Open	Service Desk	No	May 1, 2018 12:19 P Community	myMemphis	Login error	Service Desk	
1805-0031	Main Campus	Request	Open	No	May 8, 2018 3:43 P Just me	Banner	Other	Service Desk Wall	

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

- 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.

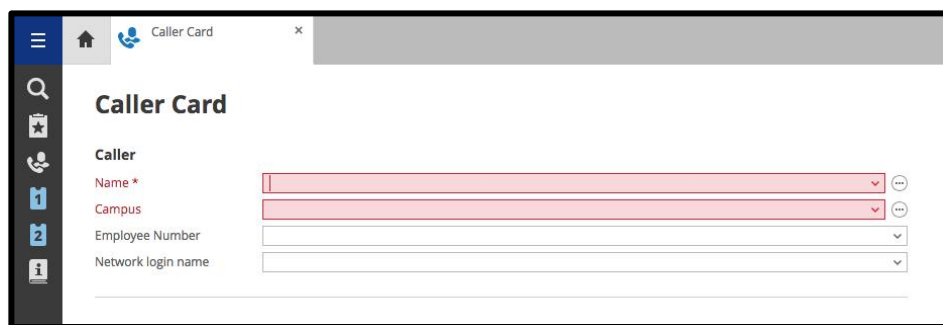


- Remember to Save any changes you have made to the incident and email the client if appropriate.

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.

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



- 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.
- 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.

Caller Card

Caller
Name: [text]
Campus: Main Campus
Employee Number: U00003242
Network login name: hbusby

Operator Settings
☐ Close Caller card after opening card

LOGGED INCIDENTS (7) MAJOR INCIDENTS (6)

FILTER: no

Incident Number	Caller name	Campus (Caller)	Budget holder	Incident Type	Status	Operator	Com	Close	Target Date	Impact	Category	Subcategory	SLA target date	Operator
11804-0120		Main Campus		Request	Open		No	No	April 25, 2018 10:17		Communication/ Phone - Install Ne			Web and N
11804-0121		Main Campus		Issue	Closed	LSP-AcadAffairs	Yes	Yes	April 25, 2018 10:19		Office/Classroom Office-Computer			LSP-AcadAffairs
11804-0136		Main Campus		Request	Open		No	No	April 27, 2018 10:43		Website	Create New Page		Web and N
11804-0137		Main Campus		Request	Open		No	No	April 27, 2018 10:43		myMemphis	ITIR - MyMemphis		Web and N
11804-0153		Main Campus		Issue	Closed	LSP-AcadAffairs	Yes	Yes	May 1, 2018 9:53 AM		Office/Classroom Office-Computer			LSP-AcadAffairs
11805-0033		Main Campus		Request	Closed	Training and Doc	Yes	Yes	May 8, 2018 3:59 PM just me		Communication/ Phone - Install Ne			Training and Doc
11805-0086		Main Campus		Request	Open		No	No	May 4, 2018 2:30 PM		Website	Website Support		Web and N



Request Action Attachments

1 of 7 selected


- 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.

- 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.

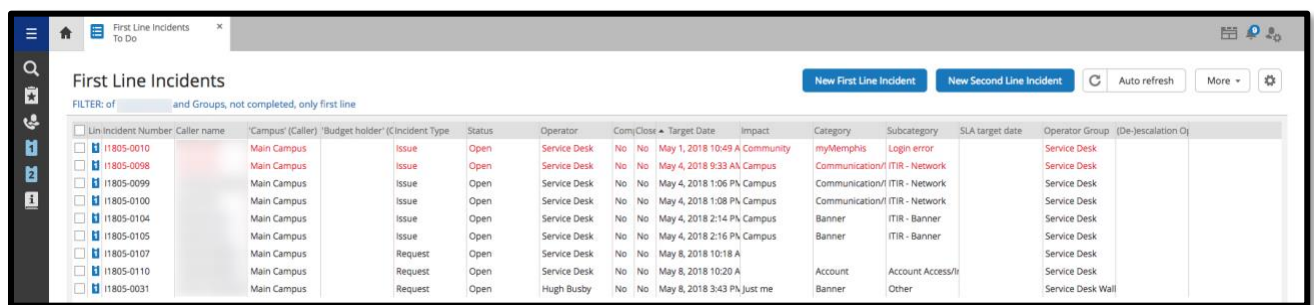
Module	Assigned to you	Assigned to group	Unassigned
1 First Line Incidents	1	2	
2 Second Line Incidents	0	1	

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.*

- 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
11805-0010		Main Campus		Issue	Open	Service Desk	No	May 1, 2018 10:49 A	Community	myMemphis	Login error		Service Desk	
11805-0098		Main Campus		Issue	Open	Service Desk	No	May 4, 2018 9:33 A	Campus	Communication/ITIR - Network			Service Desk	
11805-0099		Main Campus		Issue	Open	Service Desk	No	May 4, 2018 1:06 P	Campus	Communication/ITIR - Network			Service Desk	
11805-0100		Main Campus		Issue	Open	Service Desk	No	May 4, 2018 1:08 P	Campus	Communication/ITIR - Network			Service Desk	
11805-0104		Main Campus		Issue	Open	Service Desk	No	May 4, 2018 2:14 P	Campus	Banner	ITIR - Banner		Service Desk	
11805-0105		Main Campus		Issue	Open	Service Desk	No	May 4, 2018 2:16 P	Campus	Banner	ITIR - Banner		Service Desk	
11805-0107		Main Campus		Request	Open	Service Desk	No	May 8, 2018 10:18 A					Service Desk	
11805-0110		Main Campus		Request	Open	Service Desk	No	May 8, 2018 10:20 A		Account	Account Access/ri		Service Desk	
11805-0031		Main Campus		Request	Open	Hugh Busby	No	May 8, 2018 3:43 P	Just me	Banner	Other		Service Desk Wall	

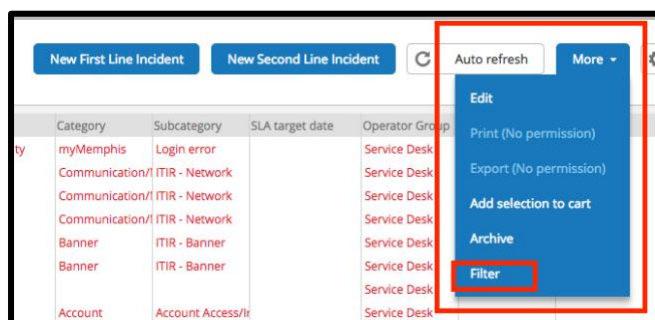
The Task list can be edited, sorted, and the columns adjusted to suit the individual operator. Click the upper edge of the column to sort by that column; the arrow displayed will indicate whether the information is sorted in ascending or

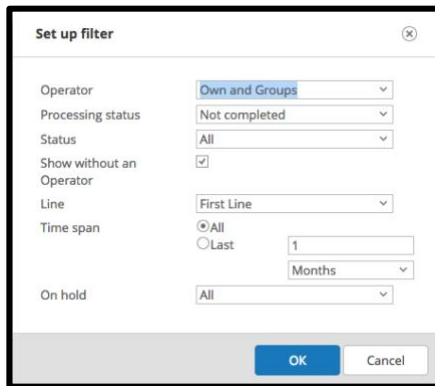
descending order .

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.





Set up filter

Operator:

Processing status:

Status:

Show without an Operator: ☒

Line:

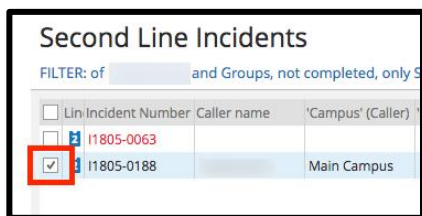
Time span: ☒ All ☐ Last

On hold:

OK **Cancel**

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.



Second Line Incidents

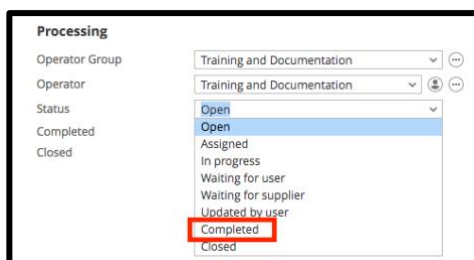
FILTER: of and Groups, not completed, only S

<input type="checkbox"/>	Lin/Incident Number	Caller name	'Campus' (Caller)
<input type="checkbox"/>	I1805-0063		
<input checked="" type="checkbox"/>	I1805-0188		Main Campus

- 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

- When an Incident has been finished, you will need to ensure the ticket is completed.
- 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:

Operator:

Status:

Completed:

Closed:

Completed

Closed

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

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
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
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.

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.

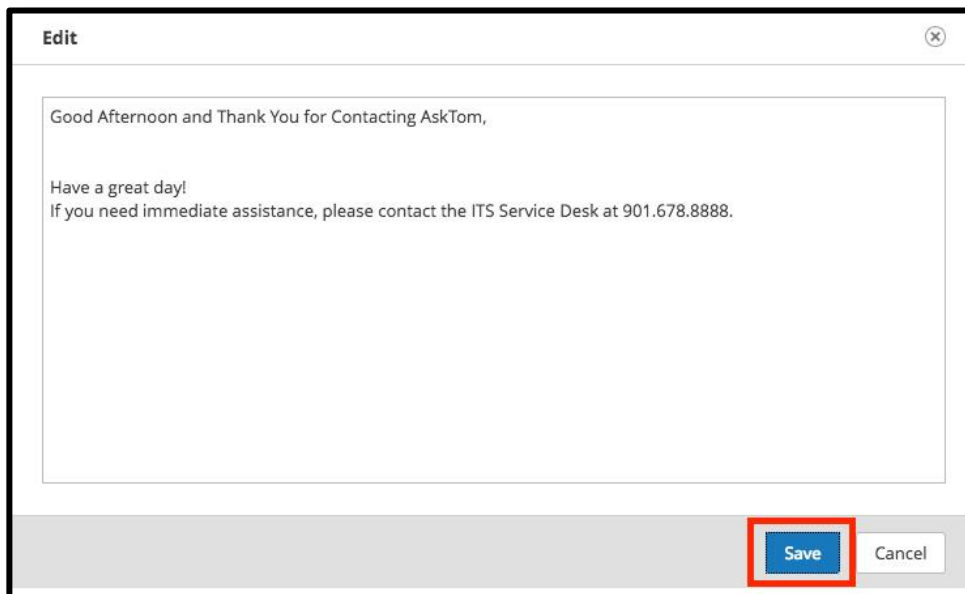
1. Default text is created from within an Incident but will then be available to the operator for all other Incidents.

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.



The 'Add default text' window displays a list of 9 empty text boxes, numbered 1 through 9. Each box has a small edit icon to its right. A 'Cancel' button is located at the bottom right of the window.

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.



The 'Edit' window shows a text area containing the following text:

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.

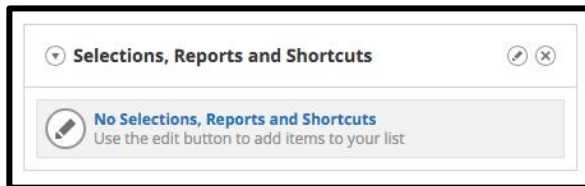
At the bottom right, there is a 'Save' button (highlighted with a red box) and a 'Cancel' button.


- To use the text, click the box containing the default text and it will automatically be added to the action area of the Incident.

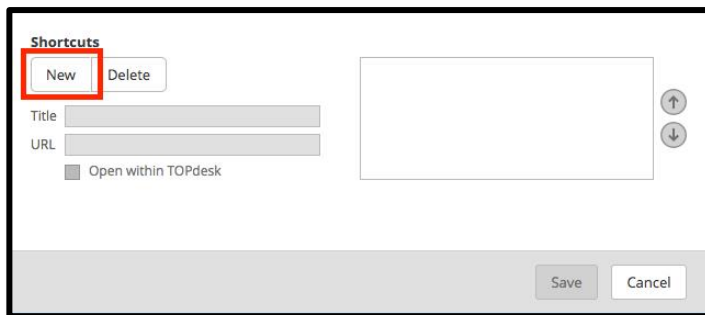
Note: The action box can still be edited, and the default text can be added to if needed.


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.



- Click on the Edit icon  at the top right of the Quick Launch Bar.
- To add a new Shortcut, click on **New** to add new shortcut Icon. Complete the Title and URL fields.



- Click **Save**. The shortcut will be created and displayed as  .

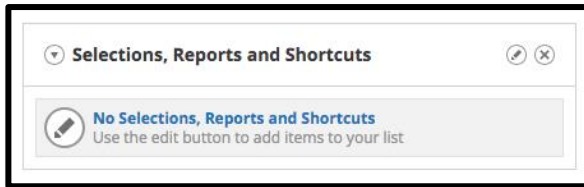
Note: Shortcuts created can be edited at any time.

Adding Selections, Reports and Shortcuts to Quick Launch Bar

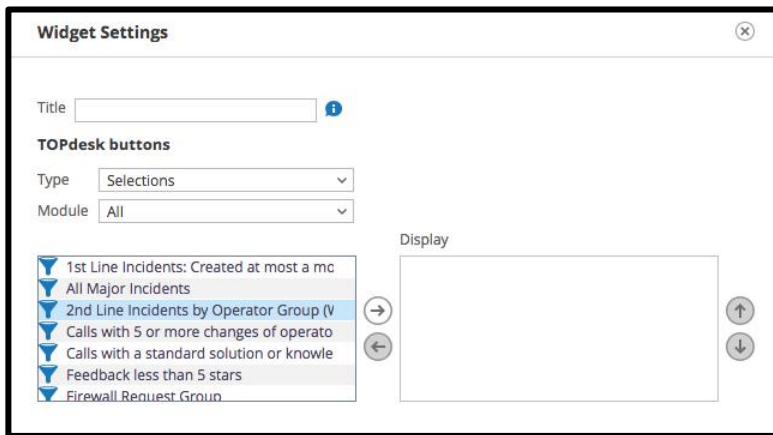
Selections, reports, and shortcuts can be customized on a per operator basis allowing quick access to information required.



Customizing

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



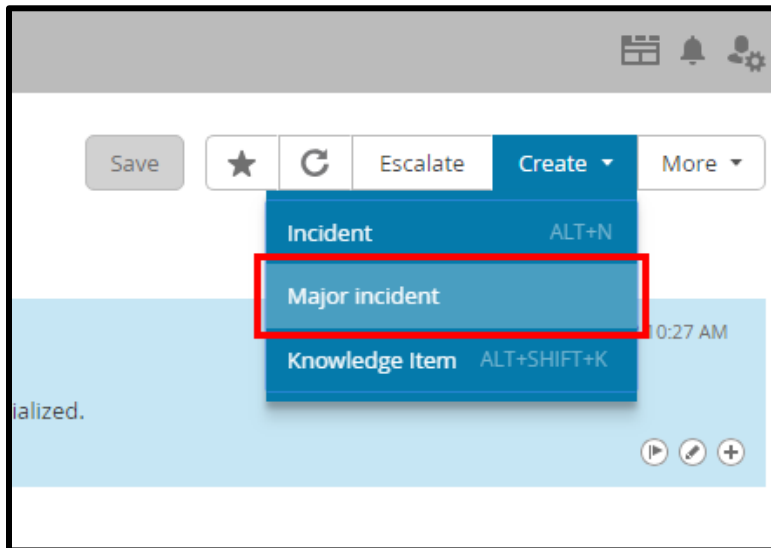
2. To add a button, use the drop downs and selection arrows to personalize the filters and click **Save**.



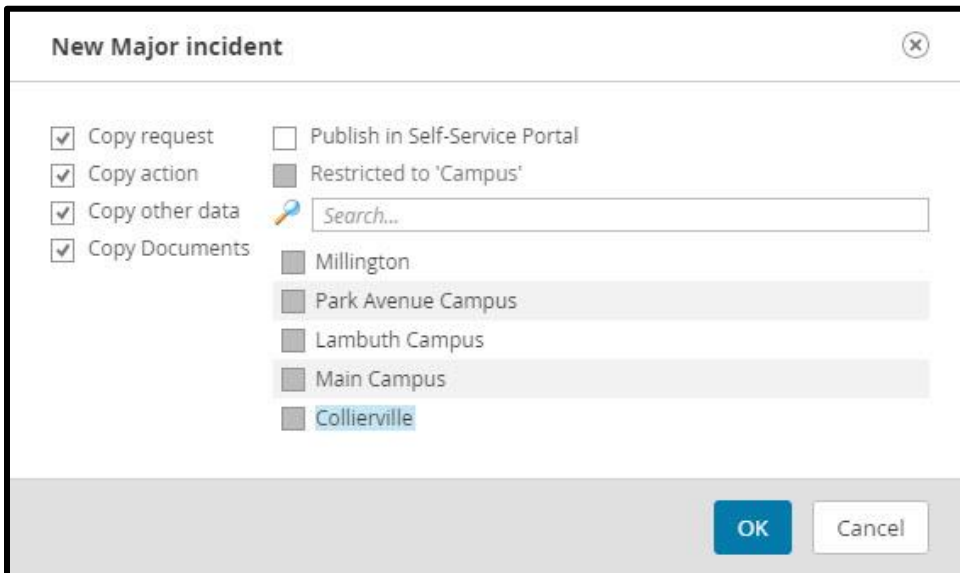
3. Existing shortcuts and buttons can be edited and deleted using the Edit  and delete  buttons. To delete a TOPdesk button you need to move it from the display list by clicking the left-facing arrow.

Creating a Major Incident

1. Open a ticket that you want to base the Major Incident.
2. Under **Create**, click the **Major Incident** option.



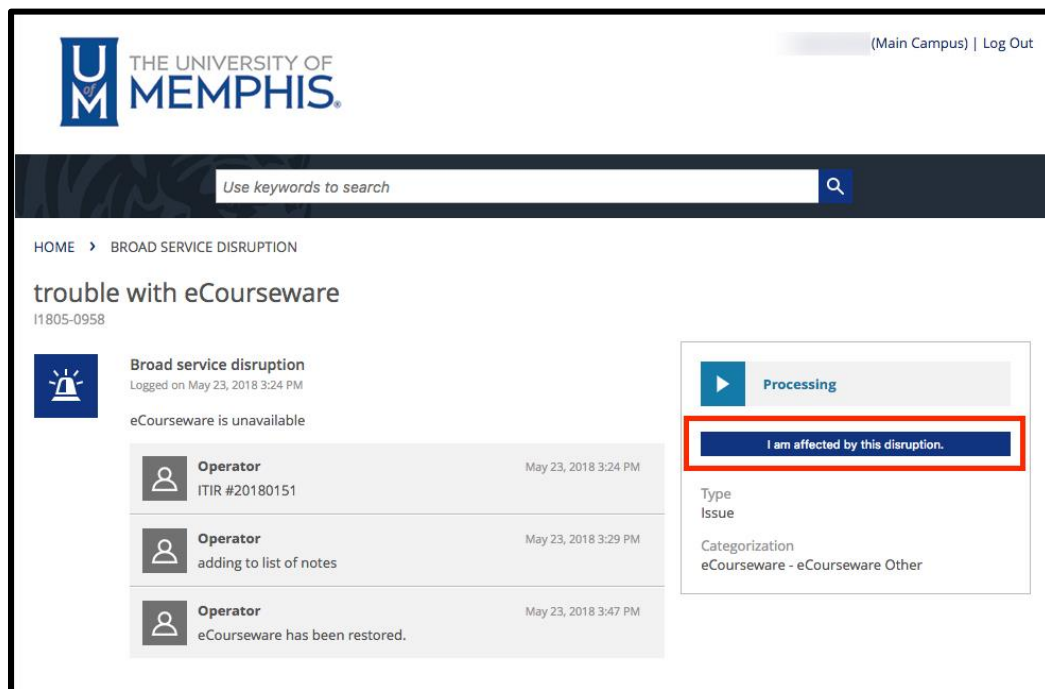
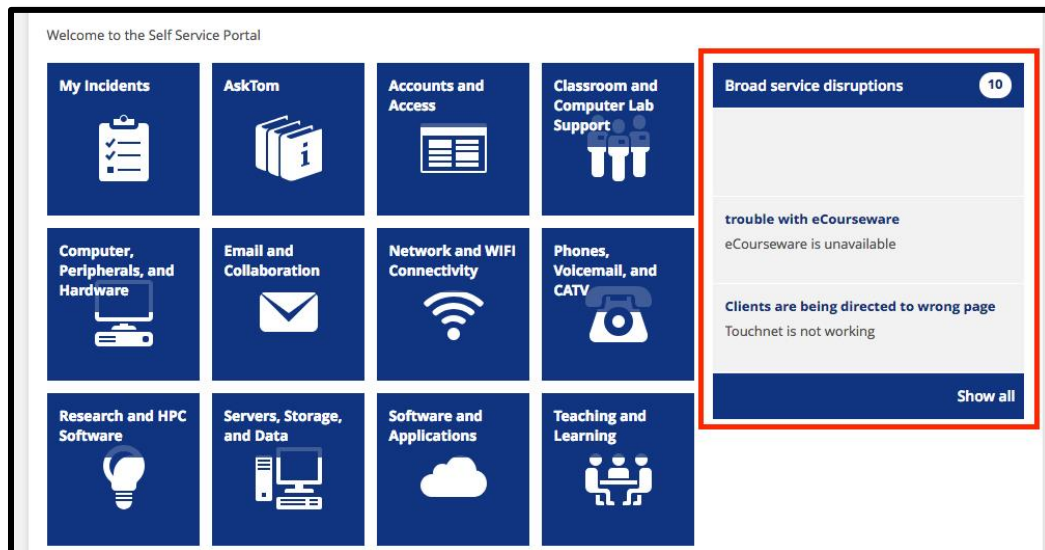
3. Select the information you want to copy to the major incident.
Indicate whether the major incident should be shown in the Self-Service Portal.

A screenshot of a 'New Major incident' dialog box. The dialog has a title bar with a close button. Inside, there are two columns of checkboxes. The left column has four checked items: 'Copy request', 'Copy action', 'Copy other data', and 'Copy Documents'. The right column has two unchecked items: 'Publish in Self-Service Portal' and 'Restricted to 'Campus''. Below these checkboxes is a search bar with a magnifying glass icon and the text 'Search...'. Under the search bar is a list of campus names with checkboxes: 'Millington', 'Park Avenue Campus', 'Lambuth Campus', 'Main Campus', and 'Collierville'. The 'Collierville' option is selected. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.


4. Click **OK**.
5. Click **Save**.

Note: When a major incident is shown in the Self-Service Portal, users can easily indicate that they are having that same problem as well. A new ticket is automatically created based on the major incident, and when the problem is solved, you can inform all affected users at one time.


Note: Major incidents shown in Self-Service Portal:



Note: Automatic ticket created based on major incident:



Processing



Thank you!

We have received your request. You can find it under My requests.
[I1805-1226](#)

Type
Issue

Categorization
eCourseware - eCourseware Other

Locating Help Resources

umTech offers support to faculty, staff, and students, provides additional assistance, and resources. Such help can be located as follows:

Submitting a Service Request

Login URL: [Click here for our service desk ticketing system.](#) After logging in, choose the appropriate form request for services.

Contact the ITS Service Desk — 901.678.8888 any day of the week! *(Excluding Some Holidays)*

[ITS Service Desk Hours](#)

Contact the Service Desk for assistance with technical login problems or issues. ALL incoming calls after hours will be handled by voicemail services. If you require assistance after 8:00 pm, please leave a message or [submit a service request](#).

Voice messages will be checked regularly and receive priority response the following business day. You may also email umTech at umtech@memphis.edu. *(Using this email will automatically generate a service request).*

Important Links

[Explore the umTech Website](#)

[Search the Solutions Page](#)