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.

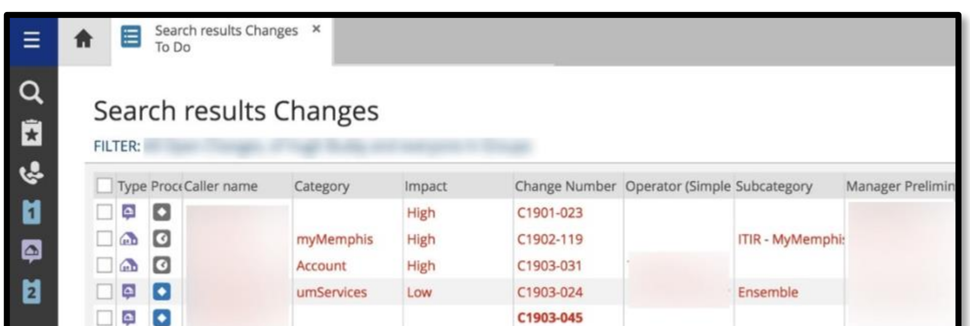
1. The Tasks block displays the number of tasks that must be processed by you  or your operator group  and the number of requests which are unassigned. The left column displays the tasks assigned specifically to you.

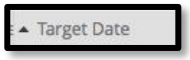
   

   The layout of the Tasks overview can be edited and customized using the Edit button .

   *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.

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 

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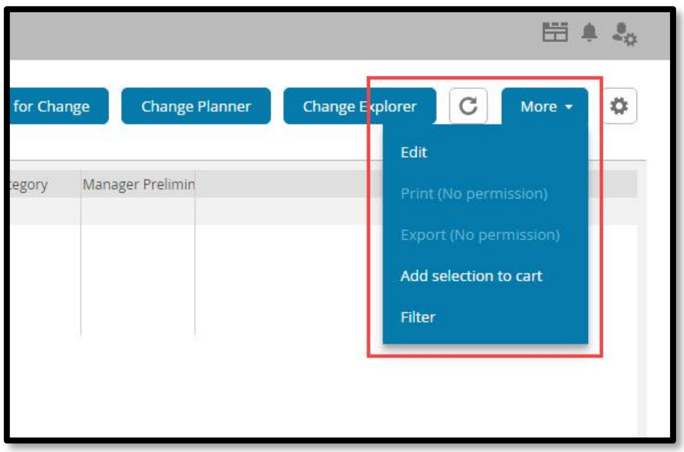
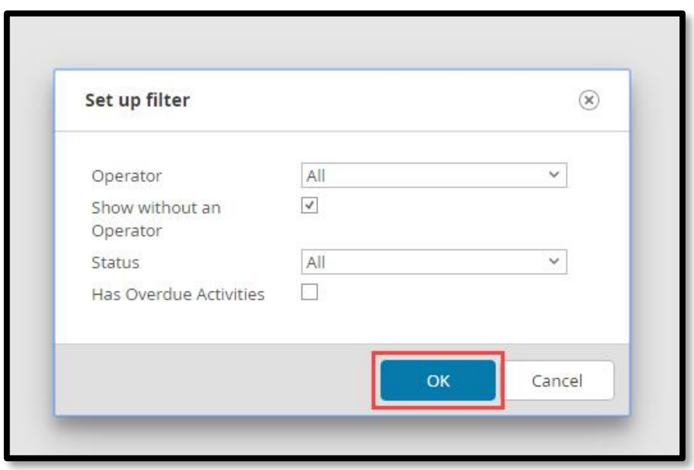
The layout is also controlled by any settings selected in your User Settings. For example, coloring of tasks dependent on due date.

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

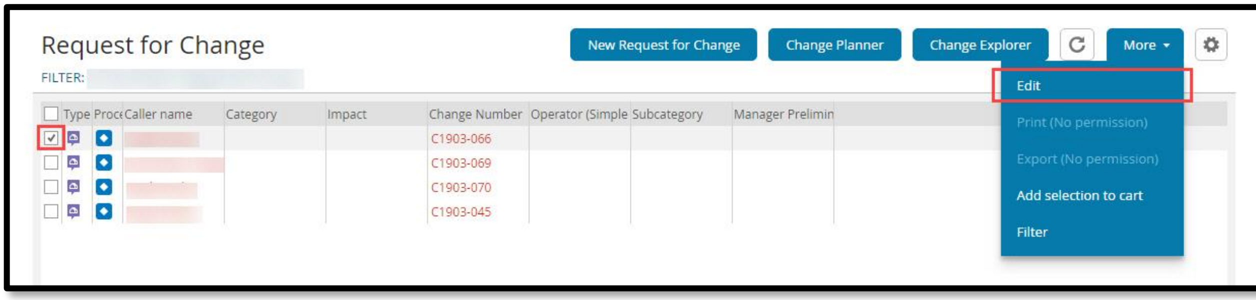
3. The Task list can also be filtered to make it easier to find a particular item. To filter, select Filter from the drop-down menu.



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



4. 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.



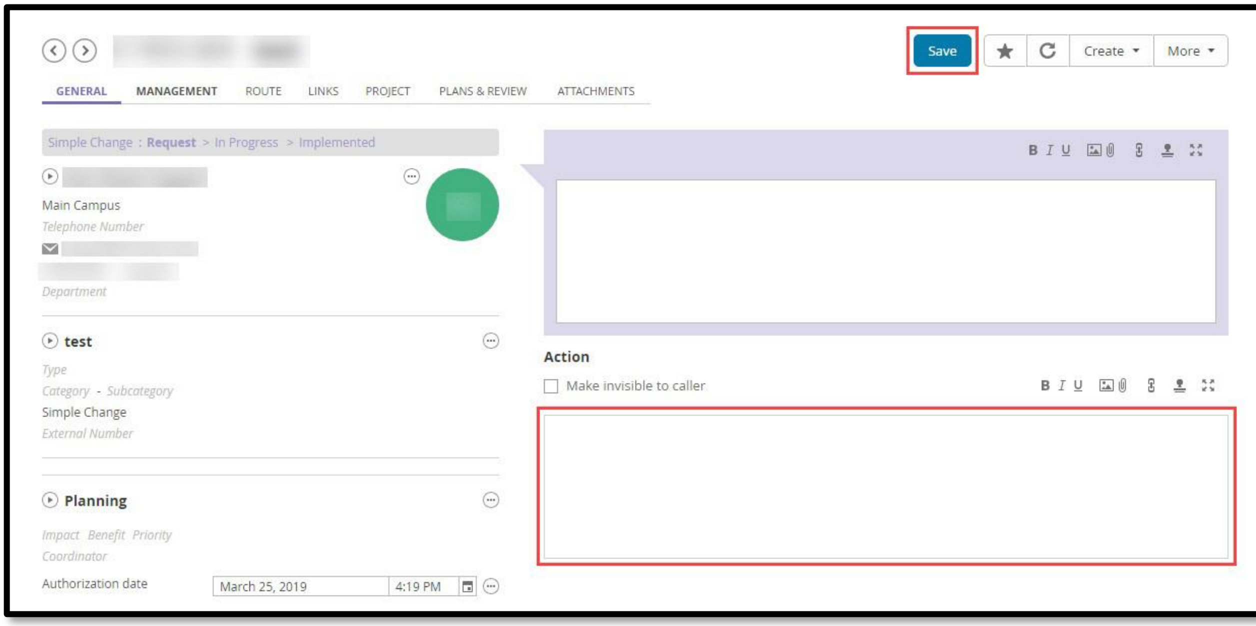
5. As with a new request, you can now edit, update, escalate, assign the request to yourself, record time taken, or resolve the request.

6. Remember to save if you have made any changes.

Resolving/Completing a Request

1. When a Request has been finished, you will need to ensure the request is completed.
2. 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.



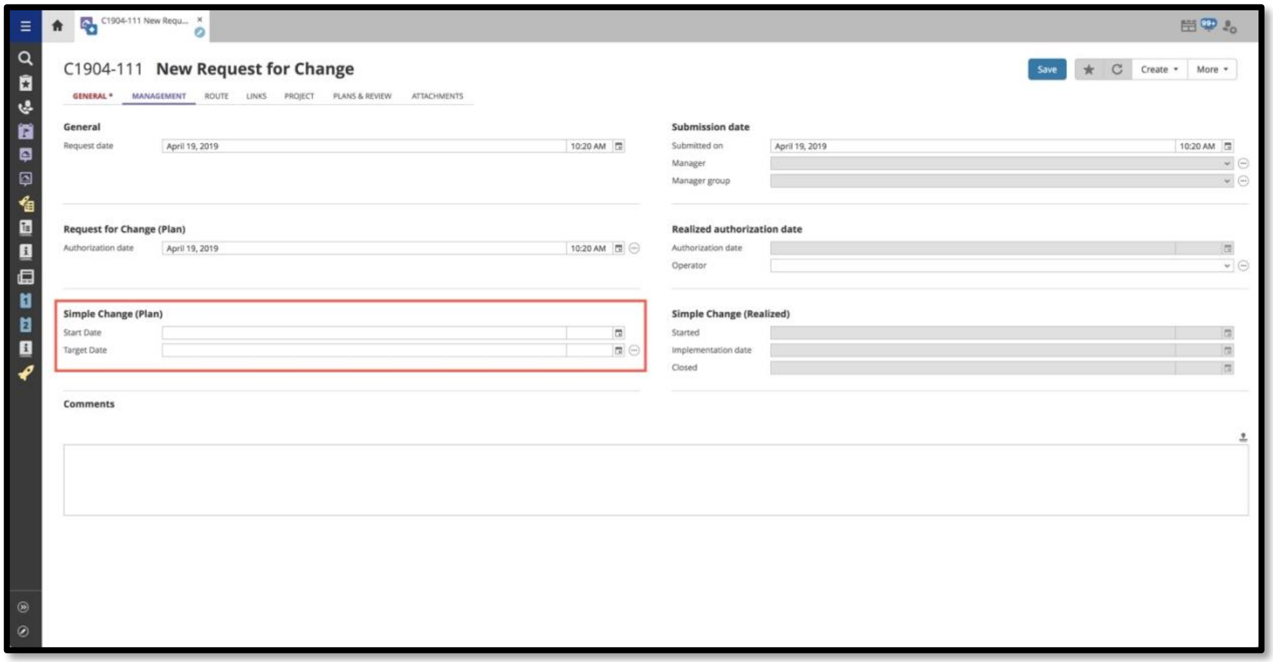
4. An email will then be automatically sent to the appropriate group confirming the request is completed.

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

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



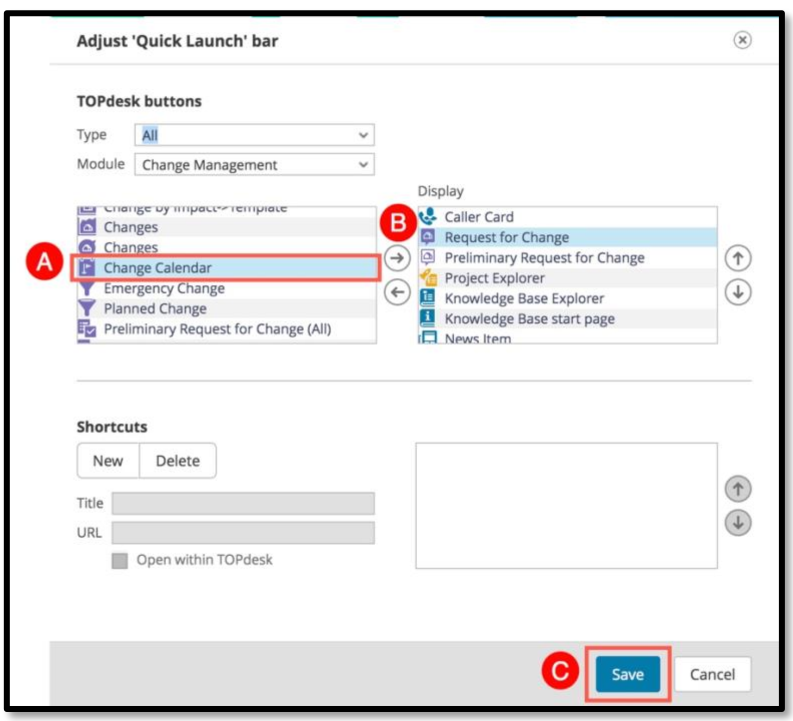
3. Click **Save**.

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**.



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