Top Desk

Using Change Management Module

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Purpose

This training material highlights how to manage, create, and understand the Change Management modules in the TOPdesk ticketing system.

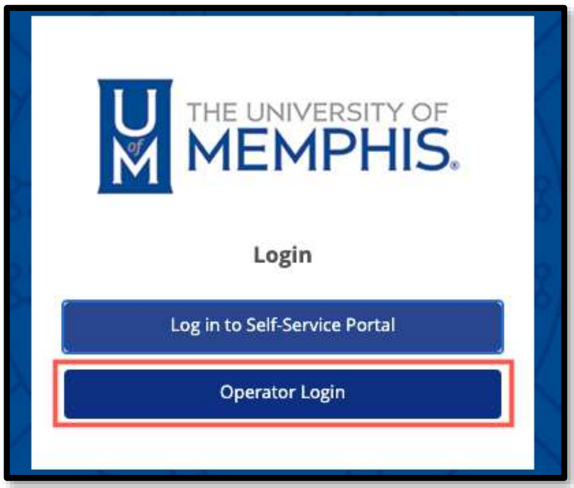
Audience

University of Memphis staff responsible for entering and managing Change Management Modules within TOPdesk.

Getting Started

Logging into the System

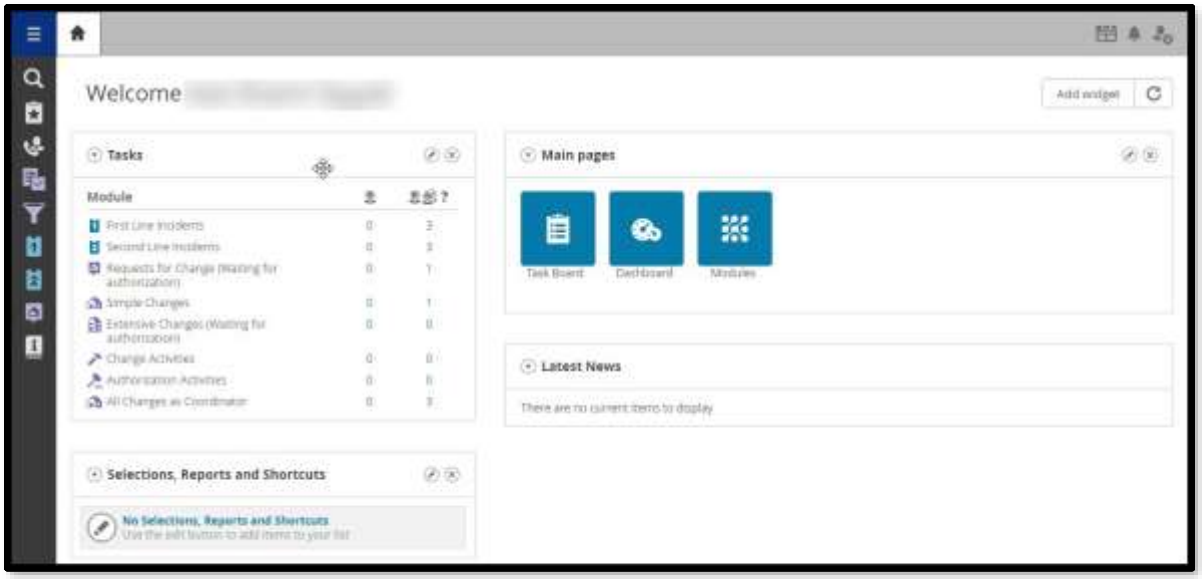
1. Browse to [the Service Desk ticketing Website,]() choose **Operator Login**.



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

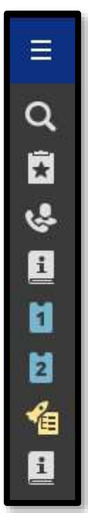
The opening screen is your personal TOPdesk workspace.

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



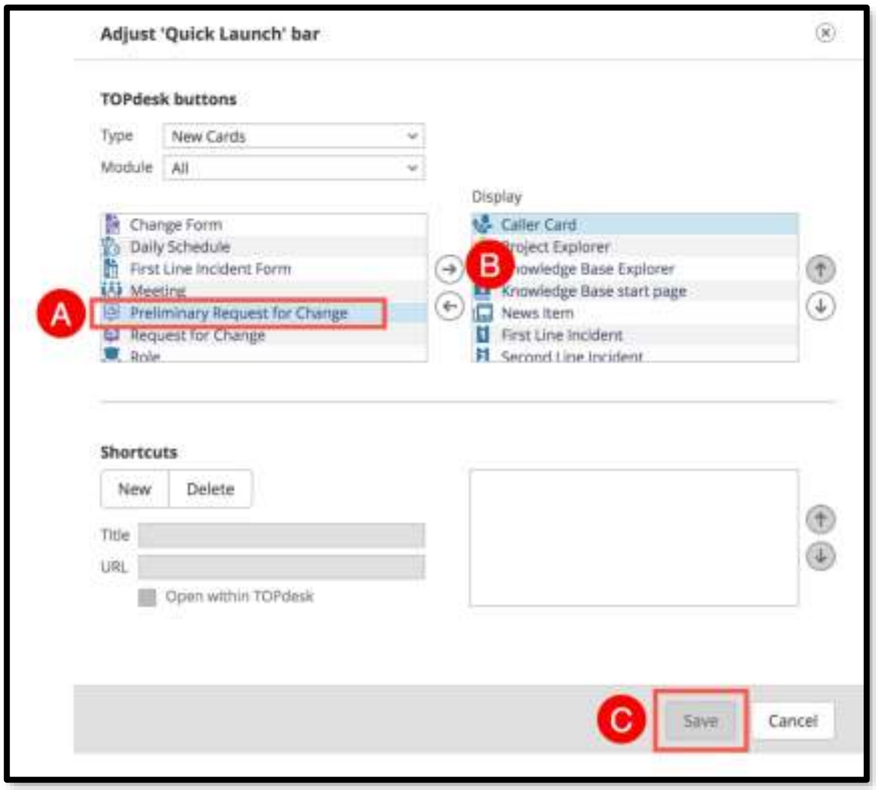
Add Items to Your Quick Launch Bar

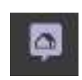
Add buttons to the Side Launch bar to include links to internal or external web pages. You can also add links to frequent activities.



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

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



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

Creating Preliminary Request for Change

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

Click on the Preliminary Request for Change () icon.

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

Red areas indicate required fields.New Request for Change: Tabs

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

General: Contains the primary request information.

Route: Displays approval history.

Links: This option allows the operator to add additional users to the request. Linked users can then be emailed as part of the request process.

Project: This option allows one to assign University Strategies and executive priority to the request. These can be chosen from a drop-down menu.

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

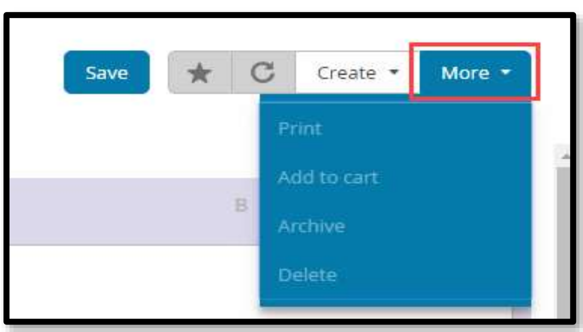
Preliminary Request for Change: Toolbar

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

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

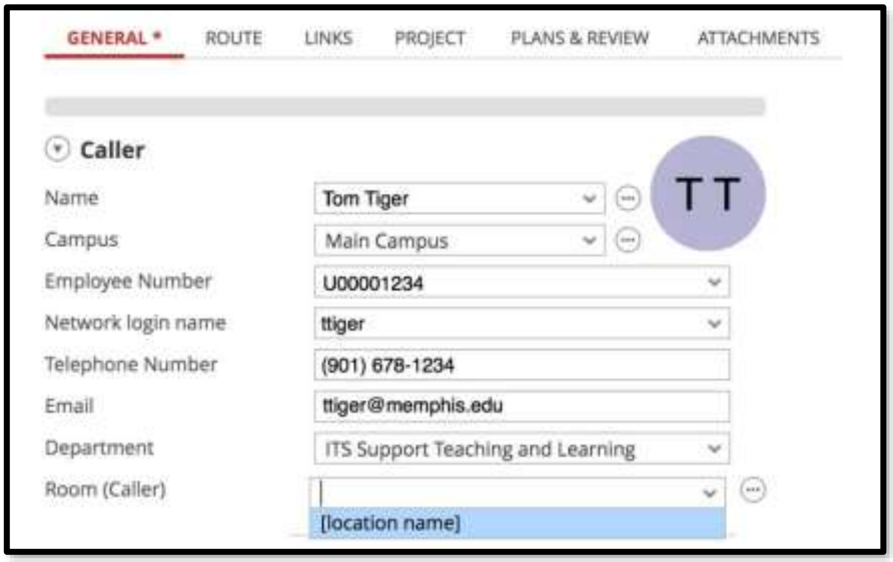
- Create a new Request for Change using the current request as a template.
- Create a new **First Line Incident** or **Second Line Incident** using the current request as a template.

E. More:



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

Caller Area



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

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

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

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

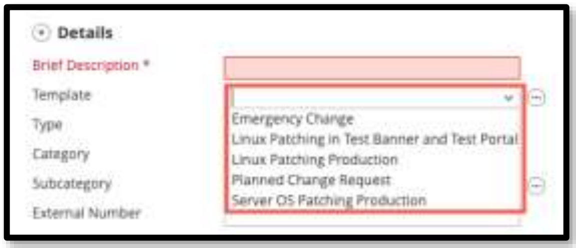
In this case you will need to fill in the caller details/contact information manually.

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

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

Details Area

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

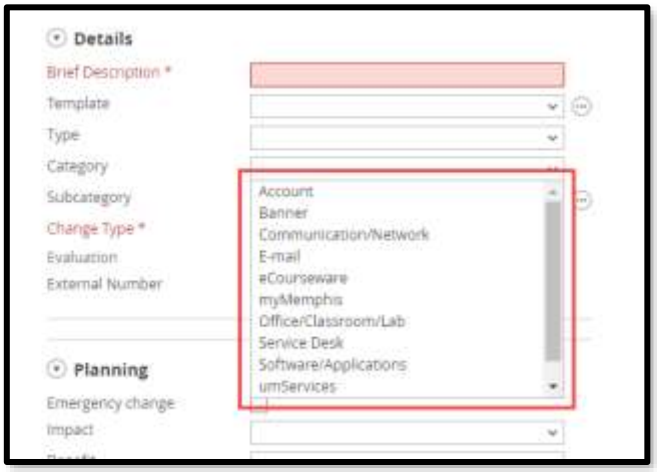


Type: Categorizes requests from the following options within drop-down menu.

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

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

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

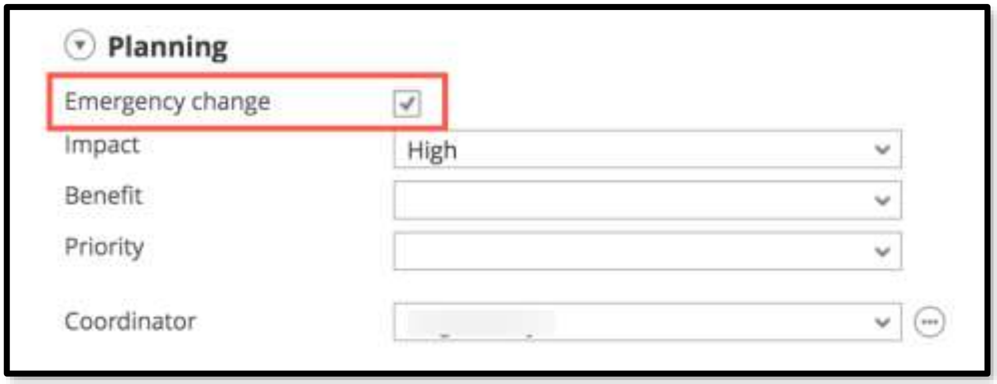


Subcategory: Subcategory is based on by the Category chosen. Choose the most appropriate service for the affected area.

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

Planning

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



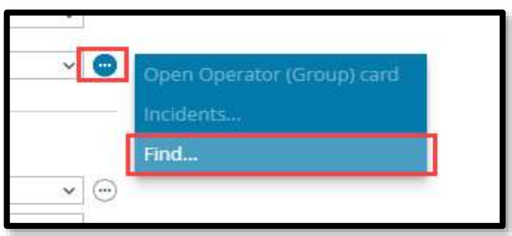
2. **Impact:** Choose from the following options: Low, Medium, High.

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

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

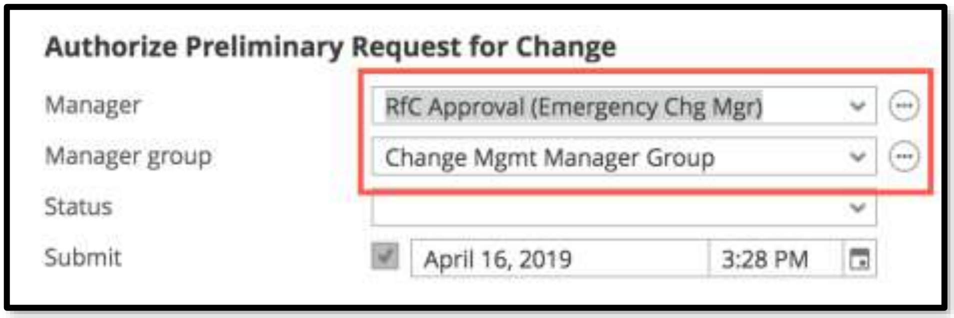
5. **Coordinator:** Select the name of the person overseeing the change request.

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

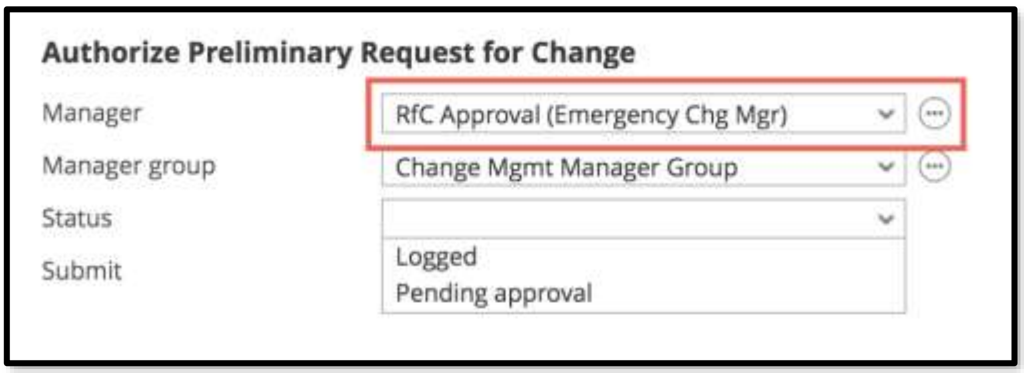


6. Authorize Preliminary Request for Change

Define who is approving the change request.



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



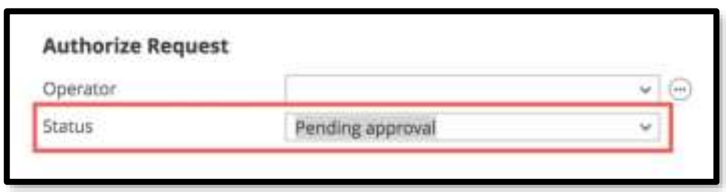
Or click on the three horizontal ••• dots and click **Find** to browse a list.

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

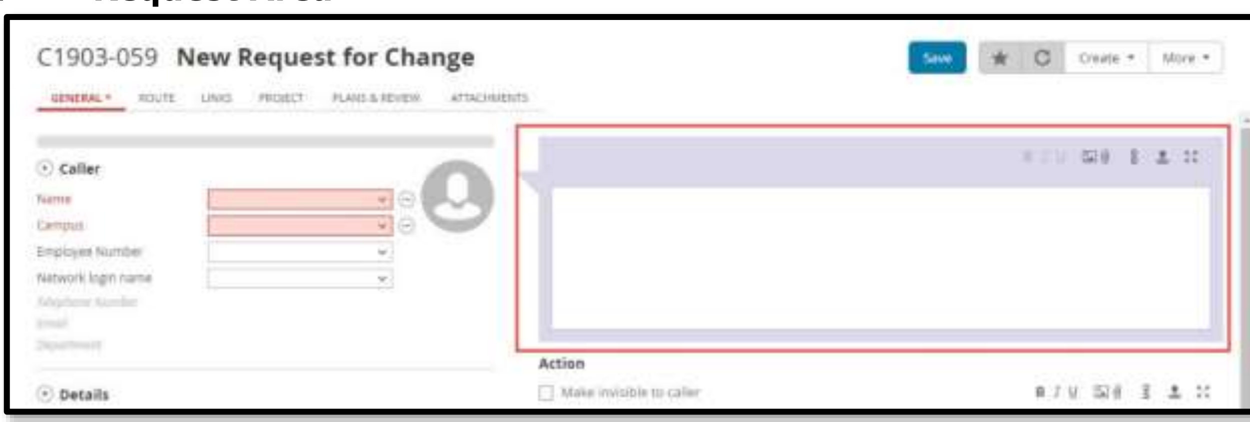
8. **Status:** Status of the request, choose from:

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

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



10. **Request Area**



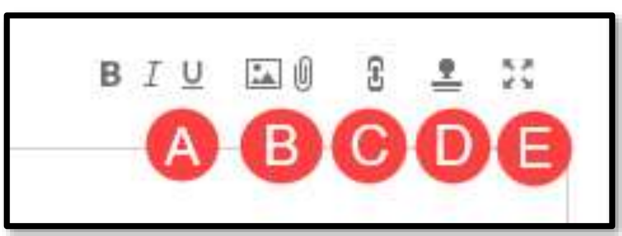
This area should be used to provide a detailed description of the request. You can also attach a file using the attachment icon .

11. Action Area

Use this area to record your actions 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 you or another operator group.

Use the formatting bar located to the right and above the Action area, to **A)** Format text, **B)** Include an attachment, **C)** Include a link, **D)** Create default text or **E)** Enlarge Action Area.



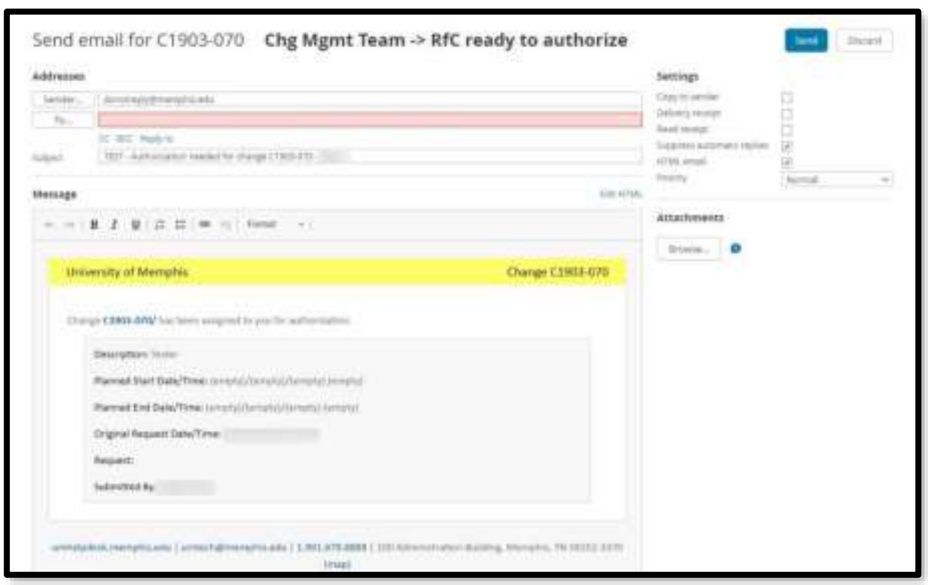
Saving the Request

The request can be saved by clicking 

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

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

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



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

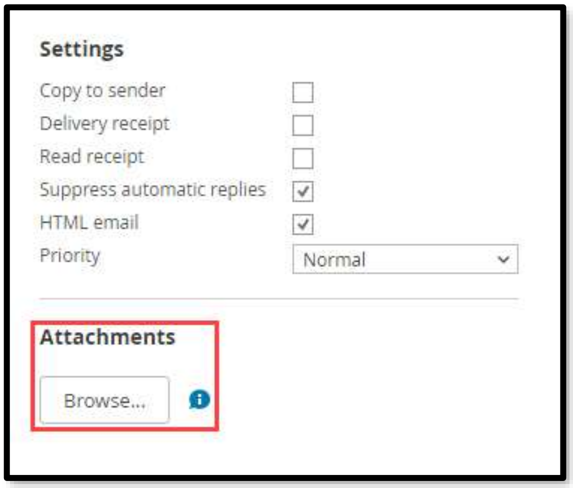
Attaching Files to an Email

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

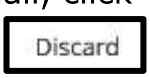
Note: *To attach a file to an Email, you must choose to do so as you compose the email.*

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

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



2. Select the attachment you wish to use by clicking the check box next to it. When you send the email, the file will be attached to it. Once satisfied with the email, click 

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

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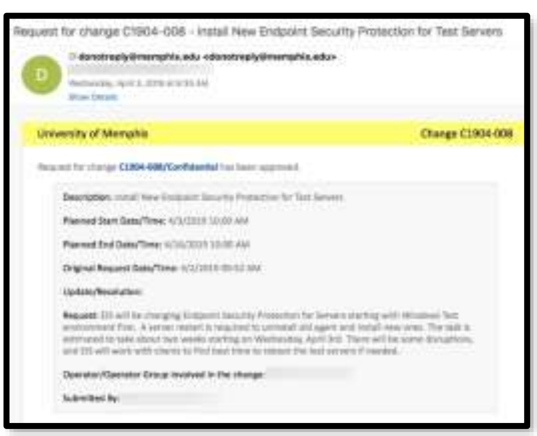
Note: *Even if you have checked the* ***Make Invisible to Caller*** *box TOPdesk will still attempt to send the caller an email—however, the email will contain the last Action Information that was visible to the caller rather than the invisible comment. You also have the capability to discard.*

Handy Hints:

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

Example of Emergency Change Email:

Example of Planned Change:

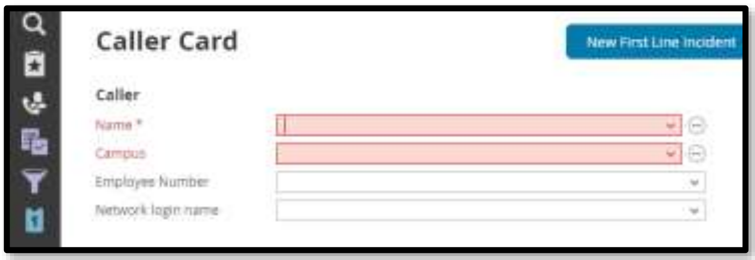


Finding a Request for Change—Using Caller Card

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.

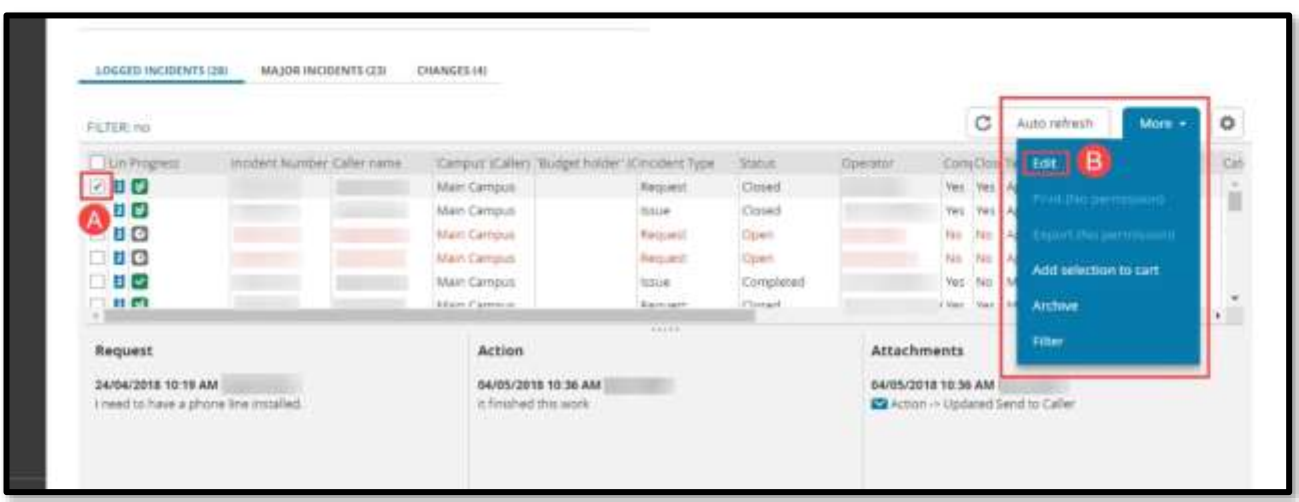
1. Click the **Caller Card** icon .

2. In the caller card, enter either the caller's UUID or Name—this uses LDAP and will auto-populate with other caller details.



3. After locating the correct name, press Enter on the keyboard. 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 request for editing, select the **A)** check box next to the relevant line and click **B)** the Edit button from the drop-down menu. ***Note:*** *You can also double-click on the request number to view and edit the request.*



5. Make any changes necessary and click **Save**.

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

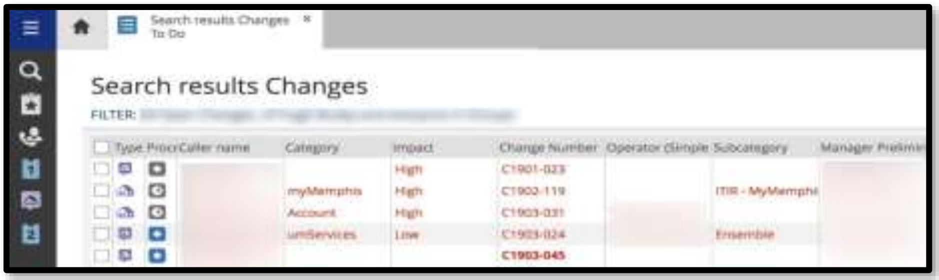
Requests that are assigned to you (or your operator group) will be displayed in your **Tasks Overview** on your main TOPdesk workspace.

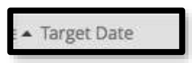
1. The Tasks block displays the number of tasks that must be processed by you or your operator group and the number of requests which are unassigned. The left column displays the tasks assigned specifically to you.

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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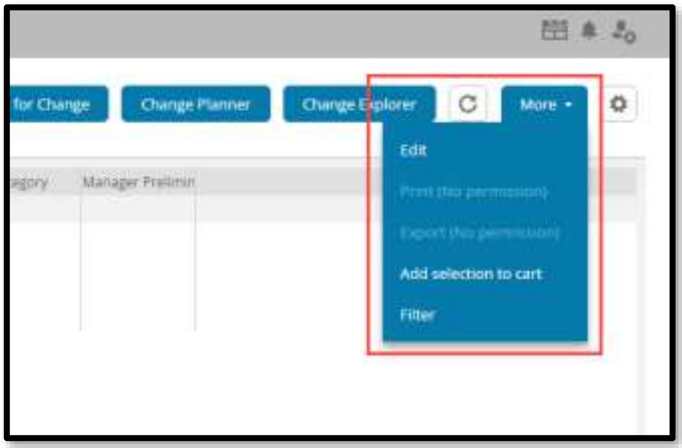
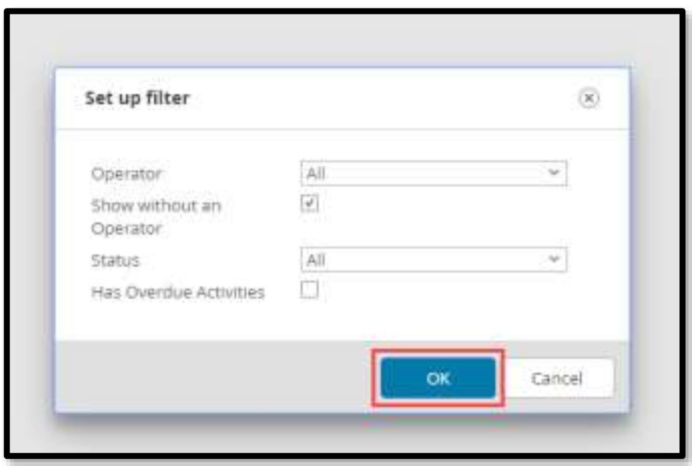
The layout is also controlled by any settings selected in your User Settings. For example, tasks can be colored dependent on their due date.

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 the edit button from the drop-down menu. The request card will be loaded in a new tab.

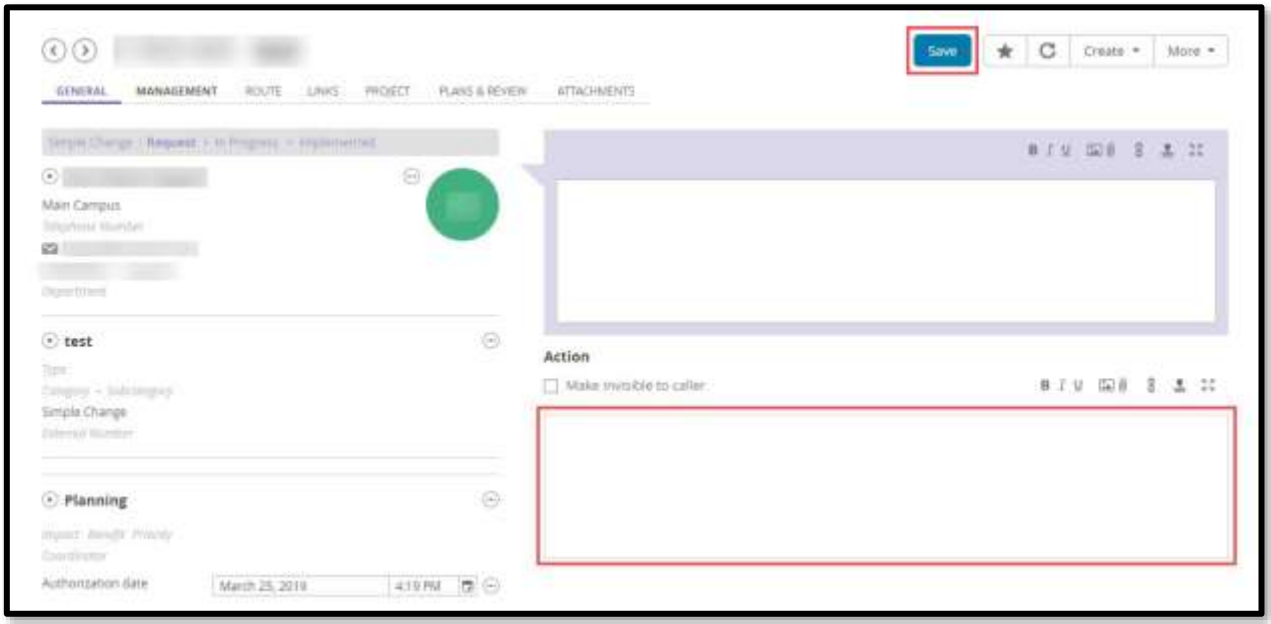
5. As with a new request, you can now edit, update, escalate, assign the request to yourself, record the time taken, or resolve it.

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

Resolving/Completing a Request

1. When a Request has been finished, you must 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.



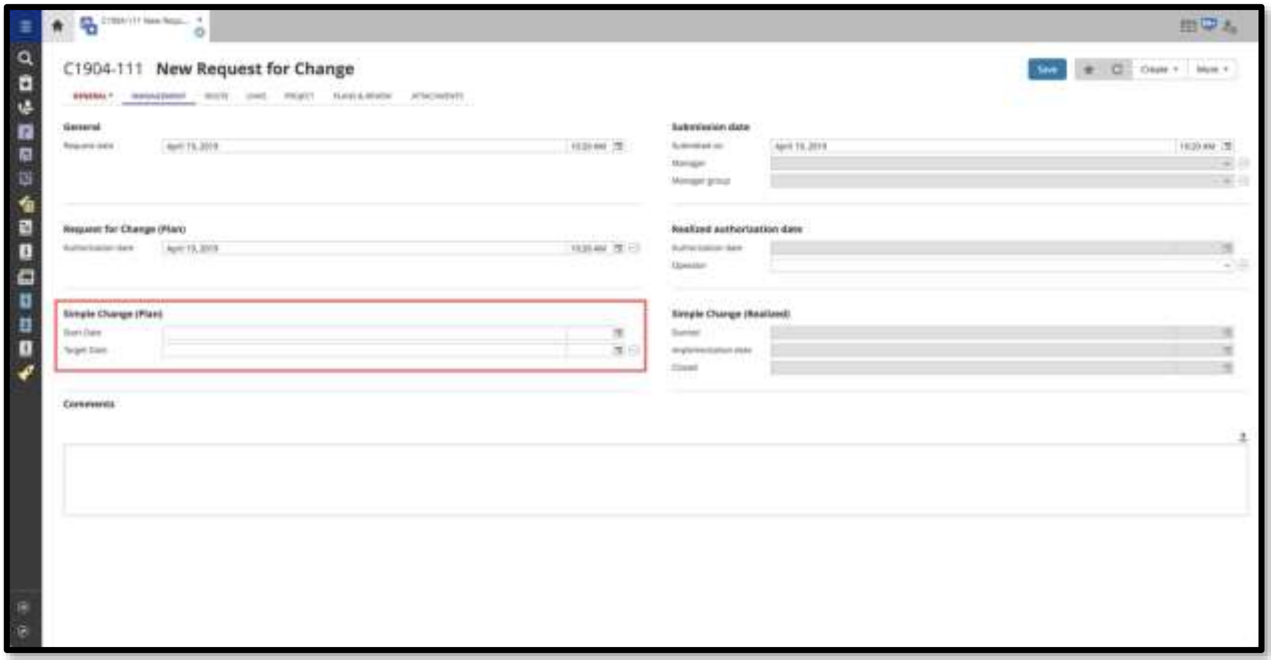
4. An email will then be automatically sent to the appropriate group confirming that the request is completed.

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**.



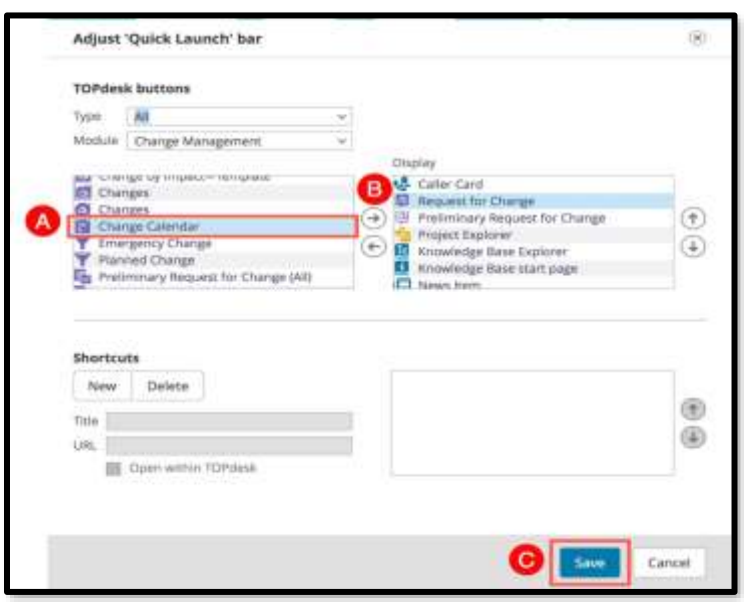
3. Click **Save**.

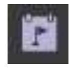
Add Change Calendar to Your Quick Launch Bar

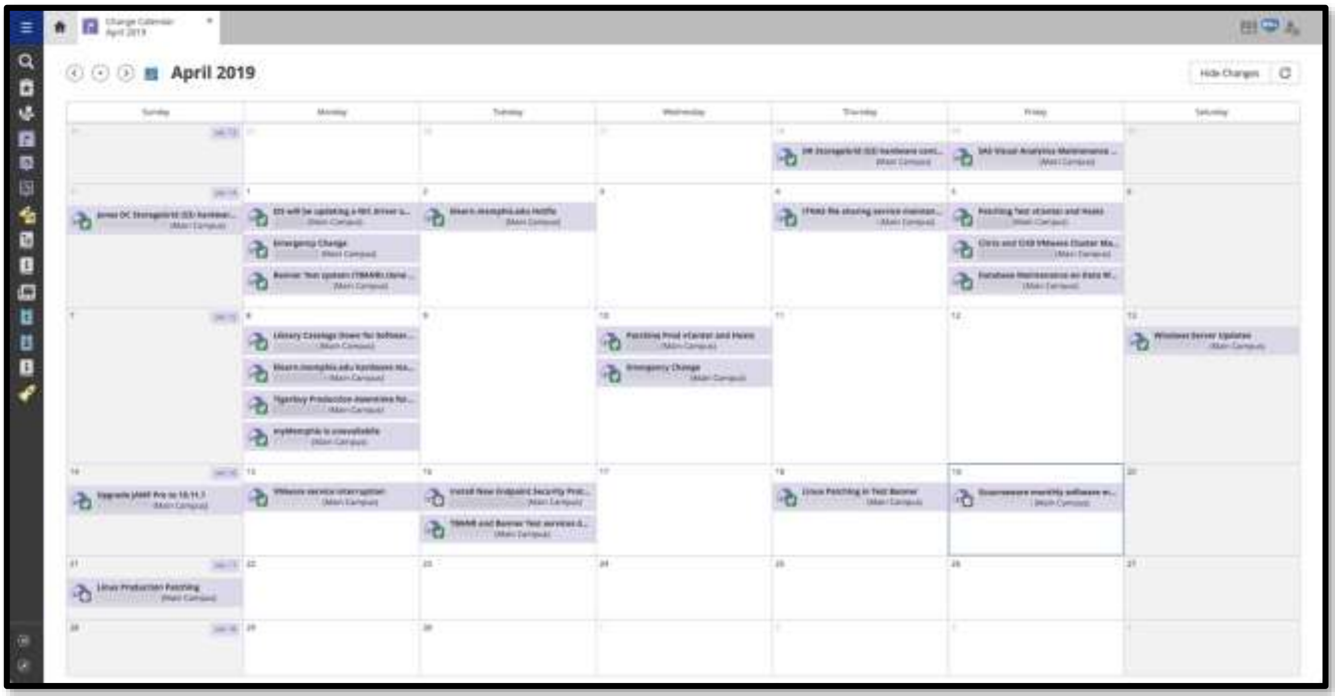
Add buttons to the Side Launch bar to include links to internal or external web pages. You can also add links to frequent activities.

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

5. 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**.



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



Locating Help Resources

umTech offers technical support and resources to faculty, staff, and students. Assistance can be found through any of the support services below:

Submitting a Service Request

Login URL: Click here to access our service desk ticketing system. After logging in, choose the appropriate form to request services.

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

ITS Service Desk Walk-In hours (Admin Building Room 100):
Monday – Friday 8:00 am – 4:30 pm

The ITS Service Desk Call Center hours:
Monday – Friday 8:00 am – 8:00 pm
Saturday 10:00 am – 2:00 pm
Sunday 1:00 pm – 5:00 pm

Contact the Service Desk for assistance with technical login problems or issues. Voicemail services will handle ALL incoming calls after hours. If you require assistance after 8:00 pm, please leave a message or submit a service request.

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

Important Links

Explore the umTech Website
Search the Solutions Page