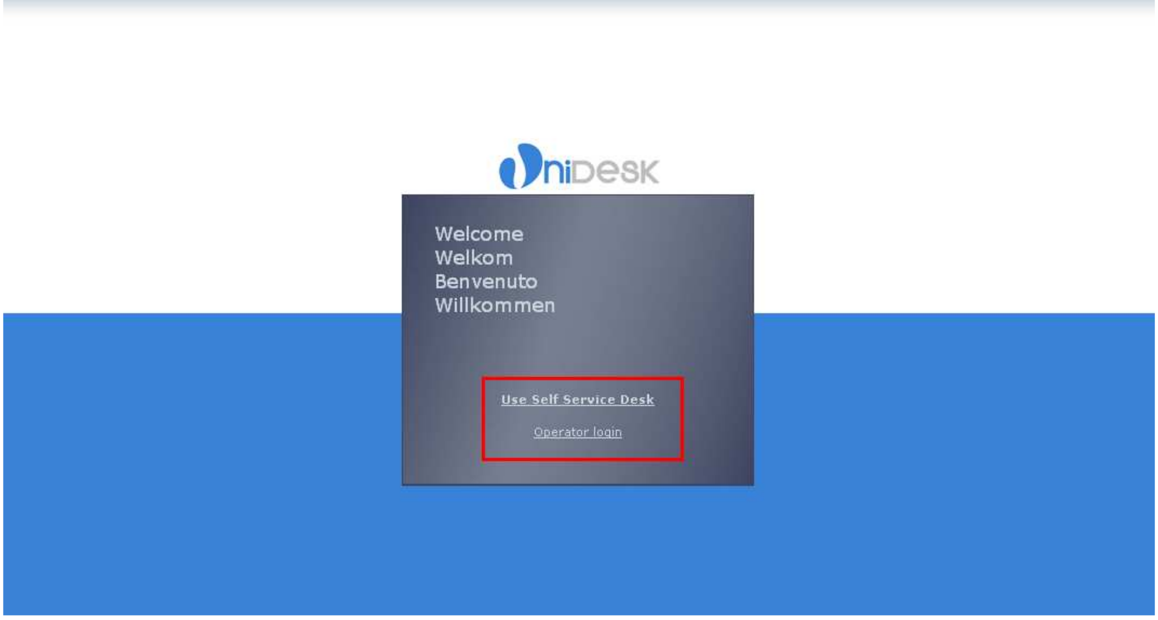
TOPdesk Analyst Training

Universities of Edinburgh, St. Andrews, Abertay

TOPdesk

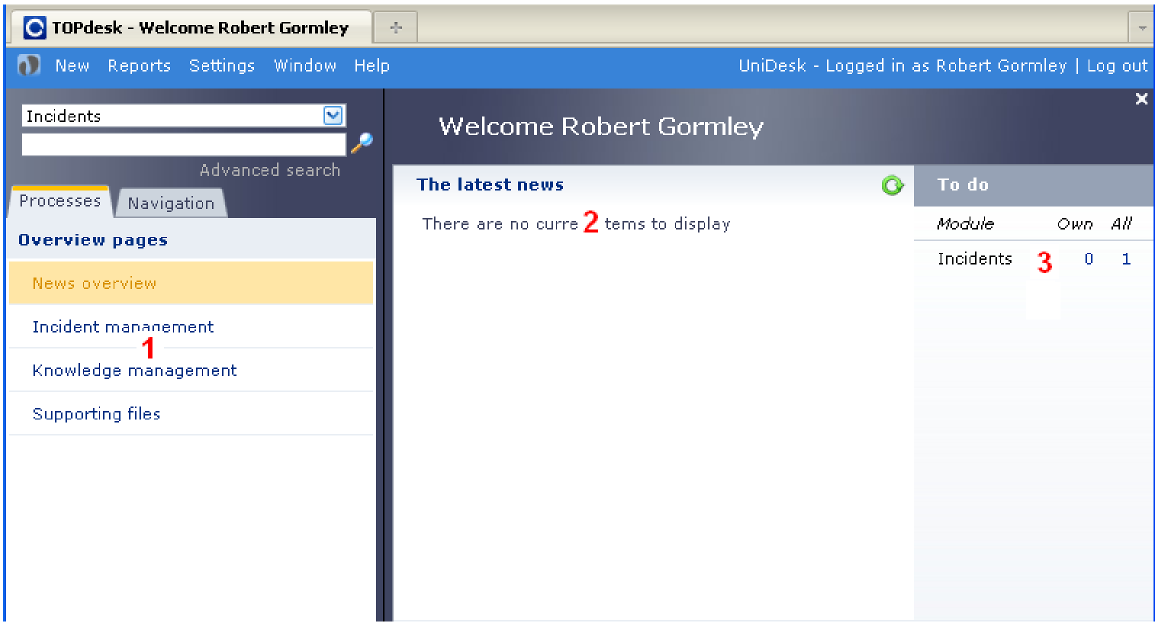
The UniDesk service uses the Service Management application TOPdesk. TOPdesk has two distinct areas. The **Self Service Desk** and the **Operator login**.



The **Self Service Desk** is the portal for the Universities end users to access their own account where they can log incidents, review incidents and potentially view the knowledge base.

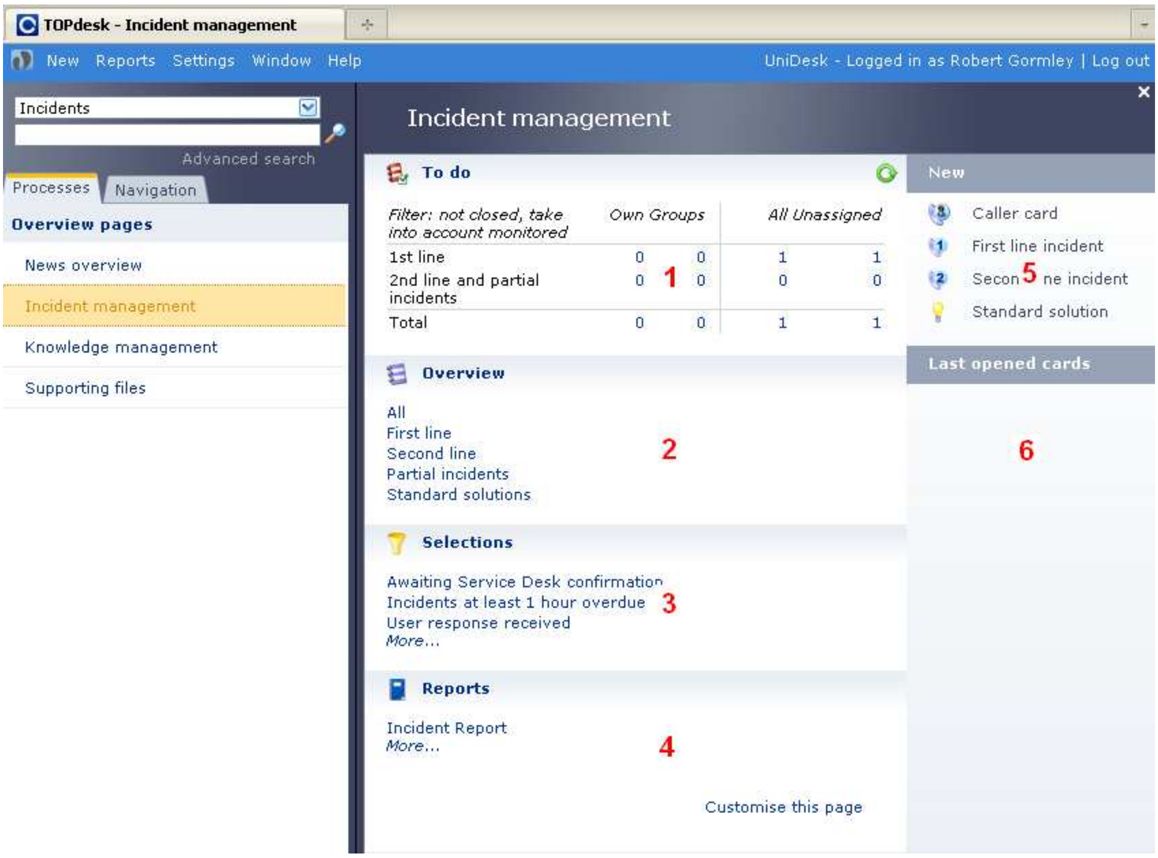
The **Operator login** provides the analysts with an access point in order to process their work. This introduction will focus on the **Operator login**.

The first thing you see when logging into TOPdesk is the **Welcome screen**. This process page consists of three components.



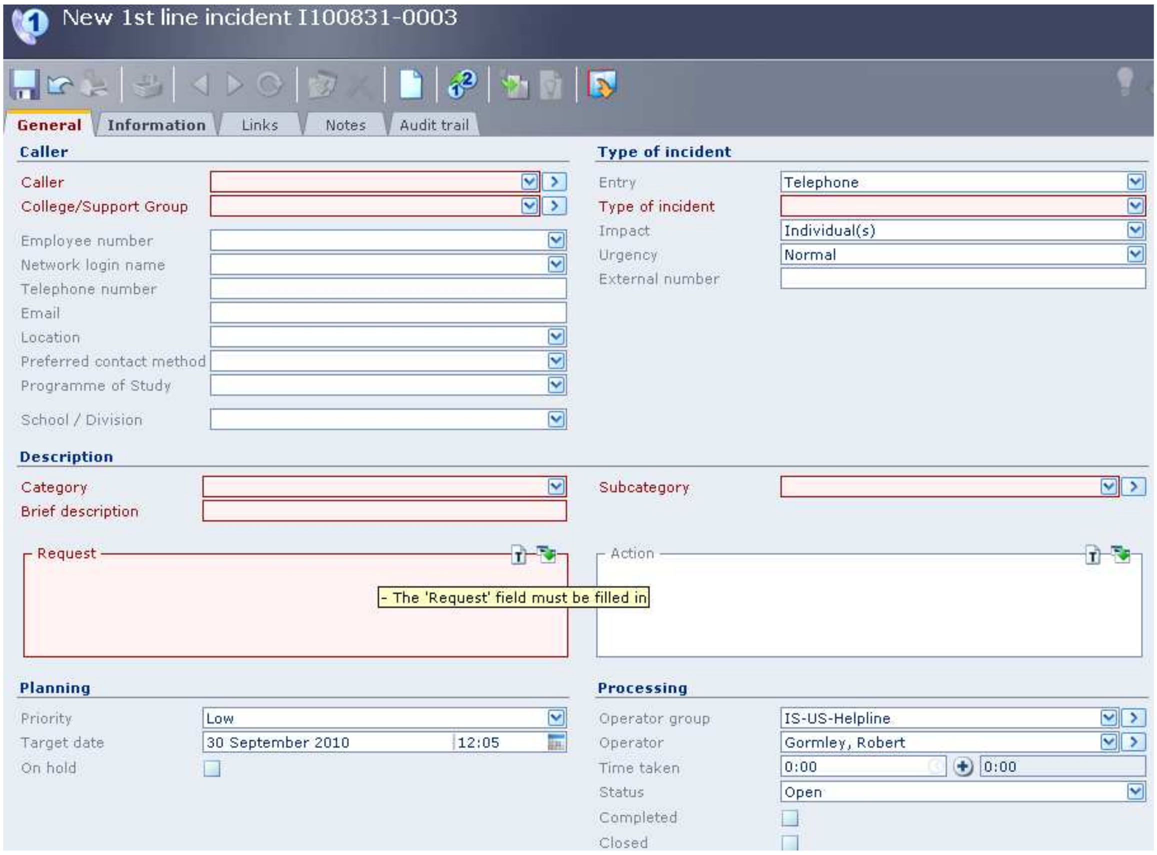
1. **Overview pages**: displays each of the processes that your account has access to.
2. **Latest News**: displays the published news items.
3. **To do:** displays short cuts to your 'to do' lists

On the overview pages you can zoom into a specific process, in this case **Incident Management**. A process page will provide a central location for all functions of a specific process. Anything that you are able to do with regards to that process will be available through the process page.



1. **To do Incident Management:** provides a detailed list of short cuts to various 'to do' lists. A 'to do' list will display outstanding work that still needs to be resolved.
2. **Overview:** as the 'to do' lists only show outstanding unresolved incidents, the overviews will show all incidents, new or old, open or closed.
3. **Selections:** provide specific subsections of incidents, for example those incidents awaiting first line closure procedures.
4. **Reports:** any reports that are available to the specific operator are published and displayed here.
5. **New:** this is where an operator can raise new incidents.
6. **Last opened cards:** this displays the last records worked on for quick reference per individual user.

If you create a **New first line incident** your screen will switch to the **navigator screen**.



Every **incident** will have its own unique **incident number**. This number is generated immediately on the creation of a new record so it can be communicated to the customer before the incident has even been saved. The incident number generated contains the date (yymmdd) followed by a unique number within that date. Fields marked in red are mandatory; you cannot save this record until they have been filled in.

Caller: You can search for callers by **name**, **login name** or **employee number** by typing in the corresponding field. TOPdesk will auto-complete all other known details.

> *QUICK TIP: If you cannot find the caller based on the name, login name or employee number you can use the* ***find*** *functionality in the menu behind the* ***caller*** *field. This allows you to search on any characteristic attributed to this caller.*

Type of incident: This is a high level categorisation of the incident. The fields **impact** and **urgency** together dictate the incident's **priority** (in planning section).

Description: this categorises the incident further, providing a field for a quick one line **brief description**, a **request** (what is the issue) and **action** (what have we done so far). The category and subcategory together can prompt a **standard solution** (light bulb at top right hand side) if one exists. Standard solutions are quick fill **templates** for incidents and are created as and when specific incidents occur.

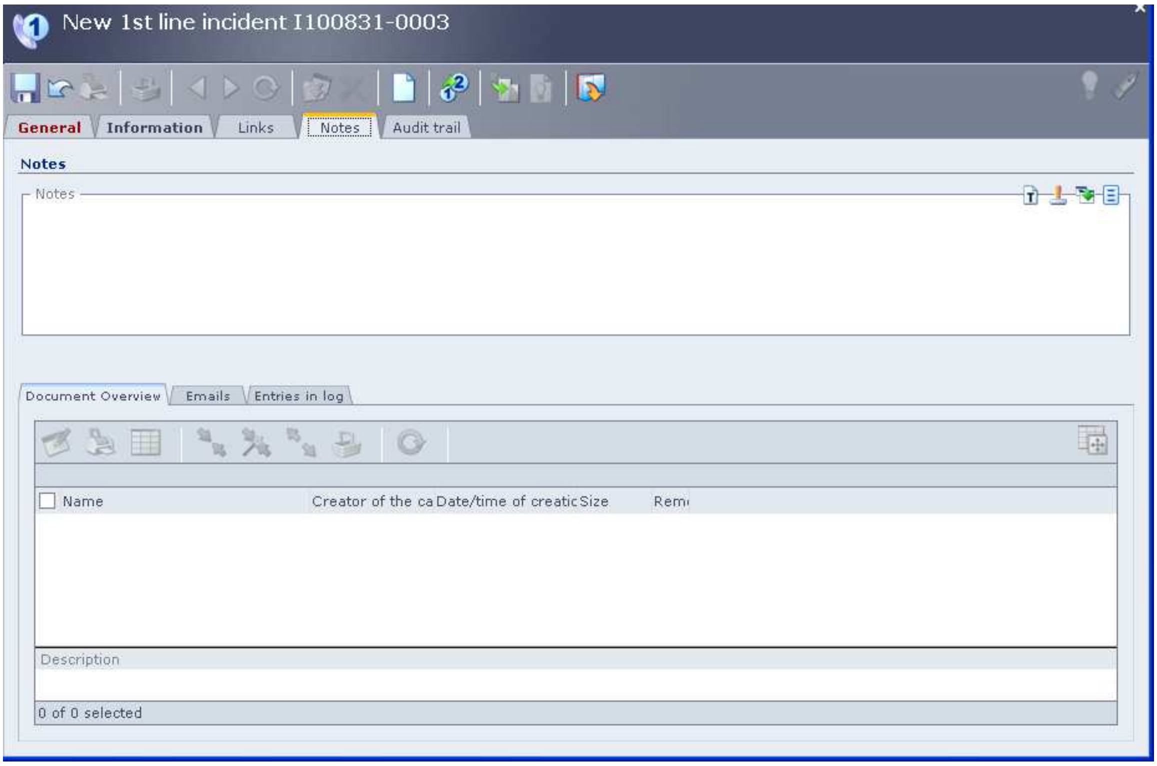
Planning: this provides a date that you are working towards, based on **impact** and **urgency** selected in the **type of incident** area, and by which the **priority** will be determined. The priority has a corresponding **duration** attached that will suggest a **target date**. The **On hold** functionality is driven by the **status** (processing) field and allows the user to 'stop the clock' whilst working on a particular incident.

Processing: Who is working on this incident and what is the current **status** of the incident. The **status** field will determine if an incident should be **on hold** (planning), **completed** or **closed.** To assign an incident to a different group of operators, you can select the relevant team from the **operator group** list. This incident will then appear in that team's 'to do' list.

Tabs: tabs to other relevant information for this incident are displayed here. The titles of each tab will be displayed in bold if they contain information.

When you have filled in the details, you can save an incident with the disk **save** icon at the top.

Every record type in TOPdesk has a **Notes tab**, this allows you to make notes that are not visible in the **Self Service Desk** and also makes it possible to see all sent and received emails and any other attached documents. It also allows you to **upload documents** yourself.



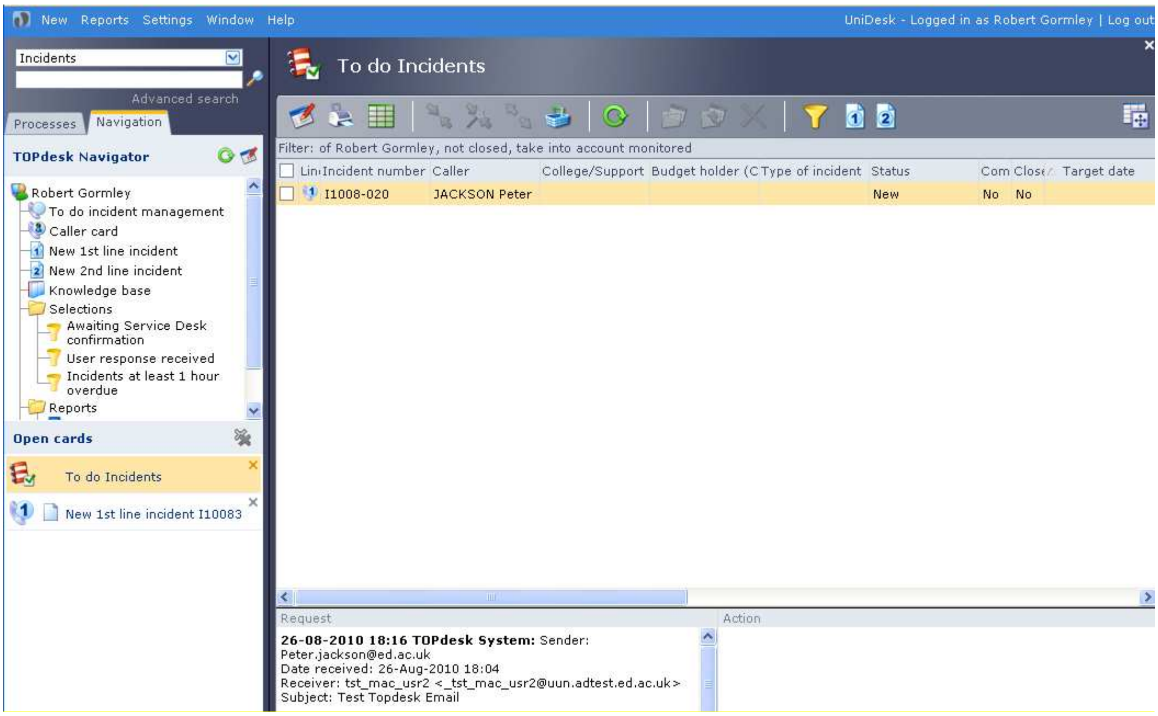
When processing an incident the common sources of information would be in order of importance:

1. Standard Solutions (light bulb at top right hand side)
2. Knowledge base (in navigator)
3. Known error database (in **links** tab)
4. Problems (in **links** tab)

The **navigator screen** will display a navigator that shows short cuts to the areas of the programme you use most. You will notice that this is another place that you can raise new incidents, this works exactly the same as in the process page. TOPdesk provides the same functions in multiple areas for ease of use.

The **navigator screen** also displays your current **open cards,** these cards can be in an unsaved state and you can switch between them (Similar to having several *Word* documents open).

> *QUICK TIP: It is **recommended** to save all data, because if your computer crashes or your browser is shut down all **unsaved data** will be **lost**. There is a **close all** button at the top of the **open cards** list that allows you to close all cards in one go, TOPdesk will prompt for each unsaved record.*



When clicking on a record in a list, it will be highlighted and the **memo** fields at the bottom of the list will display the values for that record. By double clicking you can zoom into a record and modify it.

In any list you can rearrange your columns to your preferred order and width, you can sort on a column by clicking on it. If you want to remove or add columns to a list, you can do so with the **set up fields** button at the top right of every list. It will save these settings per user.

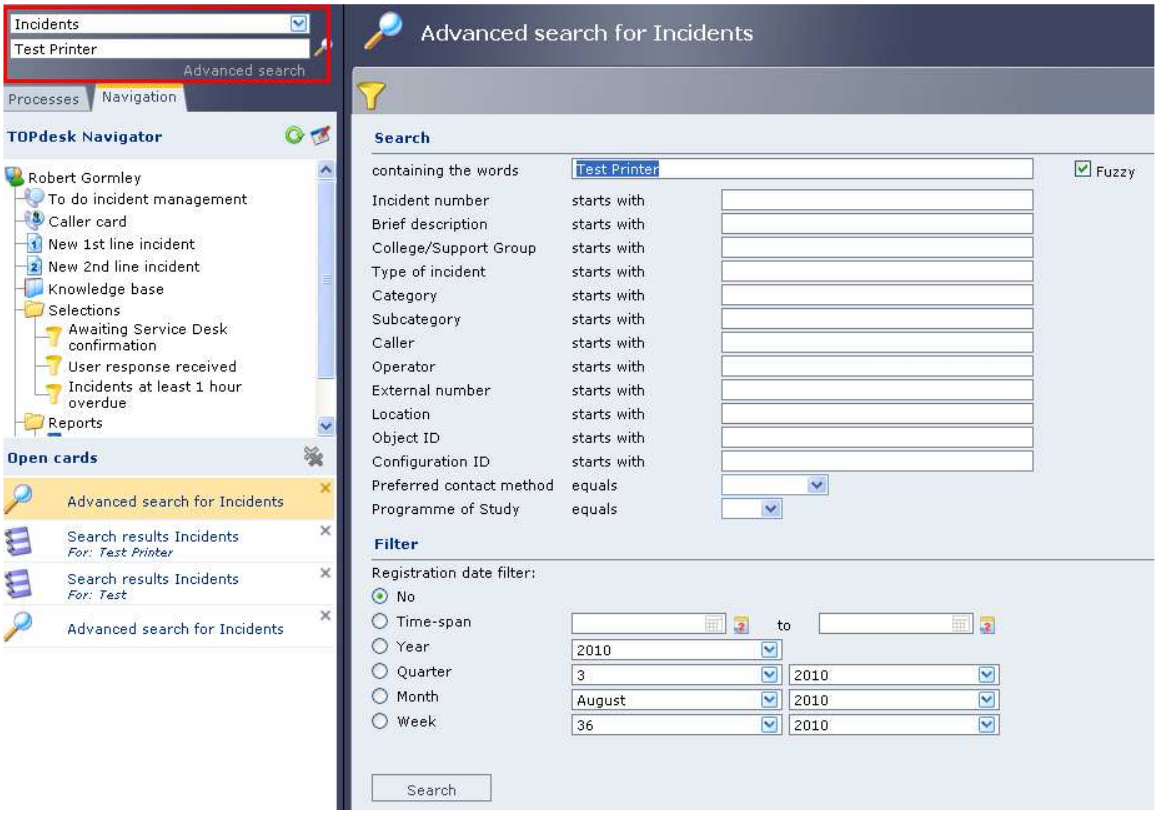
> *QUICK TIP: If you quickly want to revert back to University defaults, go to **set up fields** and press the **Default** button, this will reset that list back to the University standard values.*

In every list records can be selected with the tick box in front of it. When using the **export** or **print** functions TOPdesk will ask if you want to action the selected records or all records in the list. If nothing is selected it will always take all records.

A list content can be refreshed with the green **refresh** button.

> *QUICK TIP: If you are working on an incident from your **to do** list and want to go back to your refreshed **to do** list, you can use the navigator, it will go back to the **to do** list you have open and refresh the content in one go. Sometimes however, you do not want to refresh the list, because there was a specific record you were interested in for example, if you go back to the **to do** list through your **open cards** list TOPdesk will **not** refresh the list.*

To **find** incidents or other records in TOPdesk, you can use the **Quick Search** and **Advanced Search** functionality located at the top left hand side of the screen.



You can select the type of record you are searching for and enter one or multiple search criteria. TOPdesk will display the most relevant records and the **Quick Search** will return records with the search words in **any** field, covering all incidents. If you want more control over the search results, you can use the **Advanced search**. This searches over the same record type as selected, but you can specify particular values for **specific fields** and enter a **date range** that is appropriate to what you are searching for.

The **menu bar** at the top of the screen gives you short cuts to different areas in the programme, for example the option to create new incidents and run reports. These functions are exactly the same as the corresponding features in a different area of the programme. There is also a **help** menu that has a **help and support** section, this section contains generic **Quick start guides** to various components of the programme. For a more in depth insight you can also download the **user manual** from here, this contains a very detailed overview of functionality.