The University of Edinburgh

Information Services

Help Services internal guidance

Contents

Updated 17 November 2010

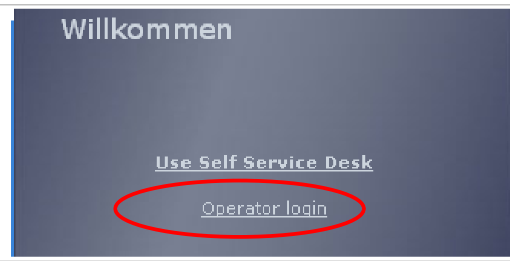
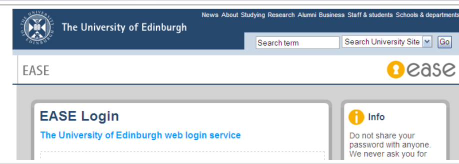
1. Logging in to UniDesk

To log in to UniDesk type the following URL into the address bar of your browser:

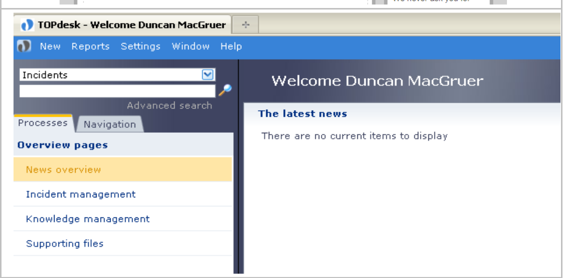
https://ed.UniDesk.ac.uk

<table>
<tr>
<td>You will see the UniDesk login page.

Click Operator Login.

(Use Self Service Desk will go live in a later phase. This “public” portal will allow users to raise new incidents and to view open requests.)</td>
<td>
</td>
</tr>
<tr>
<td>Log in with your University Username and EASE password.</td>
<td>
</td>
</tr>
<tr>
<td>After logging in, you will see the UniDesk web interface. This will open with the News page by default.

To learn about setting another default start page, see the information below.

Click Incident management to get started.</td>
<td>
</td>
</tr>
</table>

Changing the Start Page

You can choose another page as the startpage. For this you need to write a special URL (website address) for UniDesk and then bookmark it.

First, open a page such as the Incident management page and note its URL. The startpage of Incident management has as URL:
`http://ed.UniDesk.ac.uk`**`/TAS/secure/JSP/incidentbumper.JSP`**

Take away everything up to `.uk` and copy the bit after it (see in bold above).

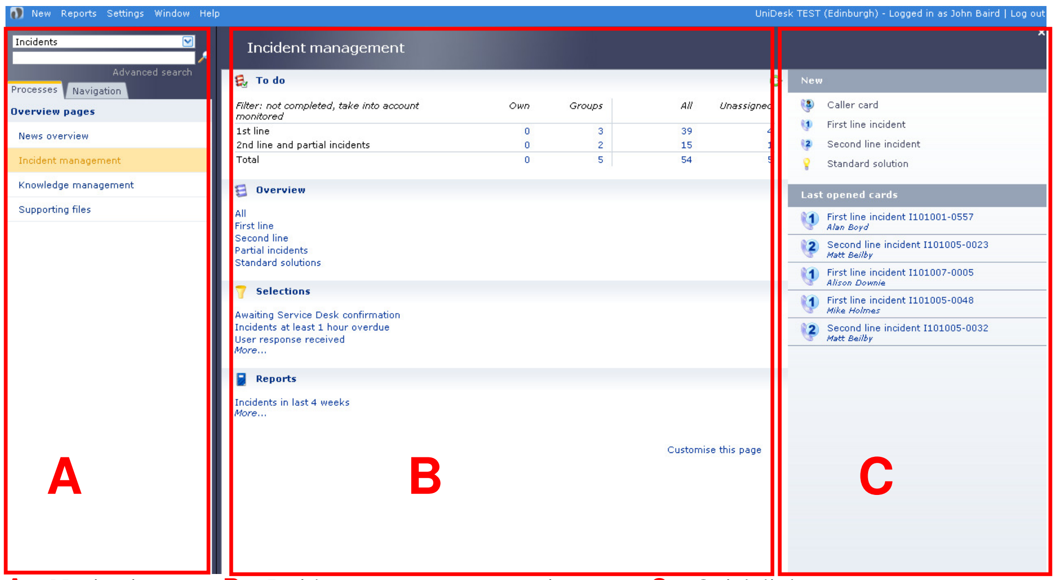
Now, paste the bit you copied (in bold above) at the end of the URL below:
`http://ed.UniDesk.ac.uk/TAS/secure/index.JSP?jspurl=`

For Incident management, you will end up with this URL (to then bookmark):

`http://ed.UniDesk.ac.uk/TAS/secure/index.jsp?jspurl=`
`/tas/secure/jsp/incidentbumper.jsp`

2. Overview of the UniDesk layout

Help Services will be using the **Incident management** module most of the time.
The start page for **Incident management** presents three main sections which we have labelled **A, B** and **C** in the screenshot below.

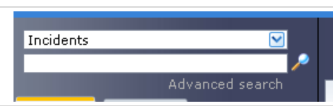


A = Navigation area, **B** = Incident management overview page, **C** = Quick links

The Navigation area on the left (**A**) never changes. The areas on the right (**B**, **C**) will change depending on what you select in the Navigation area (**A**).

Navigation area

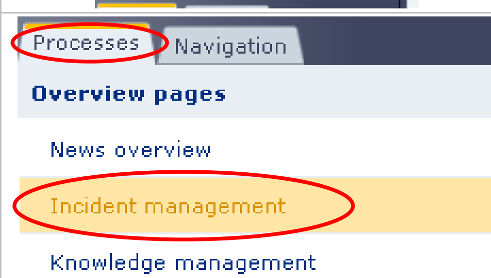
A offers a **search box** at the top. We discuss search in a different chapter further below.



Below the search box you see an area with two tabs: **Processes** and **Navigation**.

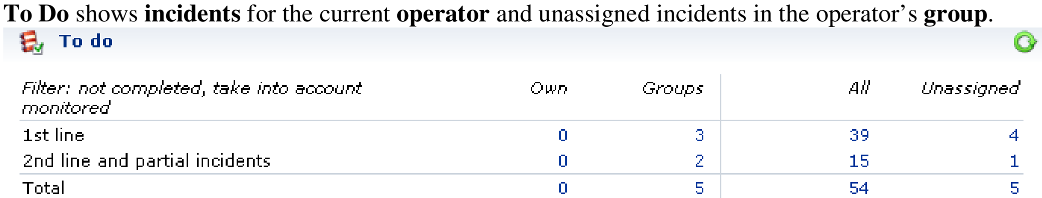
The **Processes** tab, as shown here, links to **Overview pages** for all the individual UniDesk modules. At the moment **Incident management** is the only module available.

We will look at the rest of the overview page for incident management, then explain the **Navigation tab**.



Incident management overview page

B contains a **To Do**, **Overview,** the **Selections** area and the **Reports** area.
To Do shows **incidents** for the current **operator** and unassigned incidents in the operator's **group**.



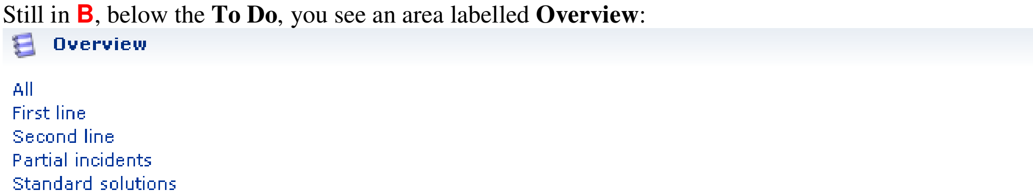
To do

Filter: not completed, take into account monitored	*Own*	*Groups*	*All*	*Unassigned*
1st line	0	3	39	4
2nd line and partial incidents	0	2	15	1
Total	0	5	54	5

These are divided between **1st line** and **2nd line incidents**. You see the number of incidents assigned to you and your group, as well as the number of unassigned ones.

To Do overview in the Incident management overview – what the terms mean: **Own:** Incidents assigned to you. **Groups:** Incidents assigned to your group, but not yet to an operator. **All:** all first-line incidents for all groups. **Unassigned:** Incidents that are currently not assigned to any group or operator.

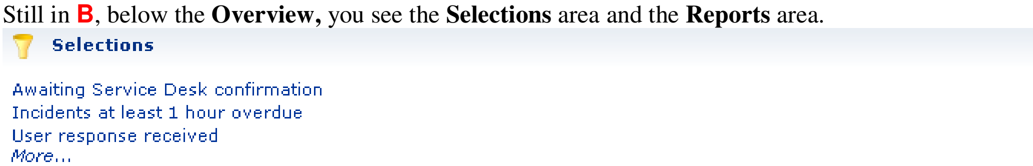
Still in **B**, below the **To Do**, you see an area labelled **Overview**:



This area provides access to calls belonging to your particular operator group.
As opposed to the 'to do' list, which by default only shows outstanding unresolved incidents, the overviews here will show all incidents, new or old, open or closed.

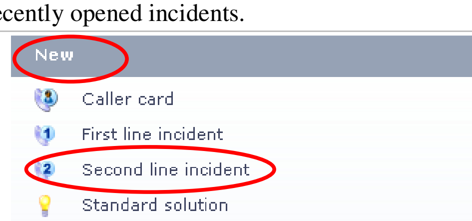
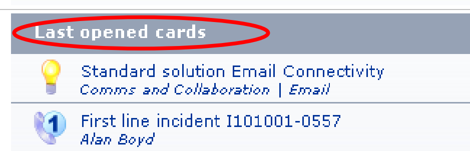
You can also access **Standard solutions** which have been written for incidents or service requests.

Still in **B**, below the **Overview,** you see the **Selections** area and the **Reports** area.



Selections are a set of pre-defined search filters for retrieving particular incidents. This guide details how to use and set up your own selections in a later chapter. **Reports** provide management information.

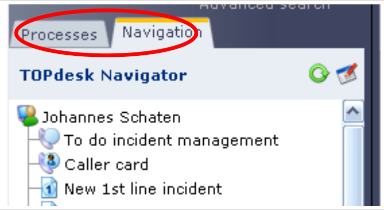
Quick links

C provides quick links for new tasks or retrieving recently opened incidents.	
By clicking on any of the links under **New**, the relevant **template** will be opened to allow the input of details. Example: Clicking on **Second line incident** will open that template.	
Last opened cards provides a history of the most recently opened incidents or standard solutions and clicking on any of the links will re-open the selected card for further viewing or updating.	

Using the Navigation tab

The **Navigation** tab shows the Operator name and a set of **Quick links** on top and **Open cards** below that.

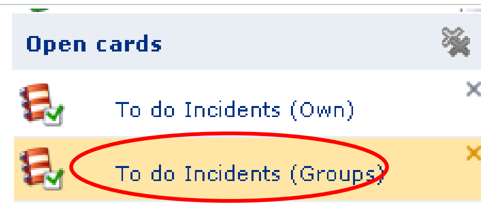
Click on your **Operator name** if you would like to change your settings.



Open cards is a list of currently open incidents or other screens.

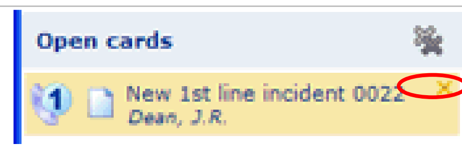
Whereas the old CMS would show multiple open calls in several different browser windows, UniDesk keeps them all in the same window as "cards".

If you click on a card, the card will be displayed in the main window. In this example, **To do Incidents (Groups)** is highlighted and the corresponding card will be displayed in the main window.



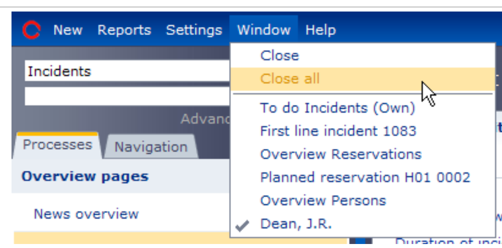
In order to **close** any **card,** click the "X" symbol next to the card**.**

Note: You cannot accidentally lose information by closing a card. If the card contains unsaved information, you will see a warning message.



Other ways to navigate

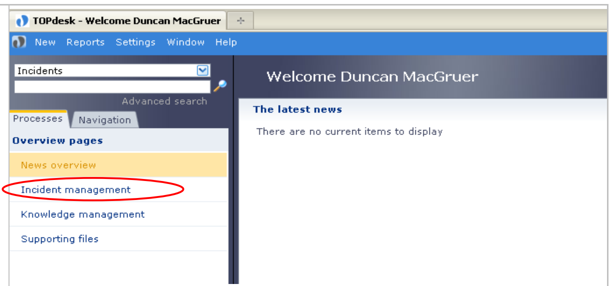
The menu option **Window** from the menu at the very top of the screen will also show the most recently opened cards at any time. You can also close any opened cards from this menu option.



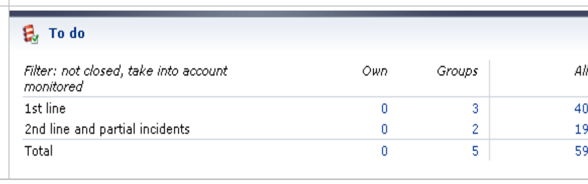
3. Viewing to do lists for you and your group

Navigate to the UniDesk homepage as in Chapter 1.

Click on **Incident Management** in the left-hand navigation pane to open the UniDesk Incident Management process.

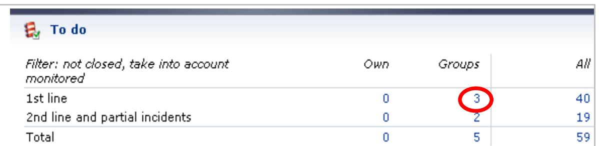


You will see the **To do** overview as described in the previous chapter.



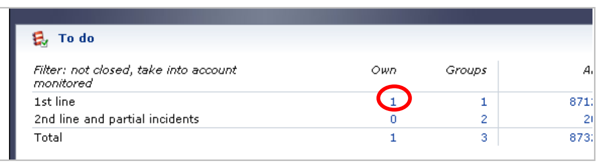
Viewing the to do list for your group

To view **1st line** incidents for your **group**: In the table, click on the number corresponding to **1st Line** and **Groups** (circled in red as shown on the right).

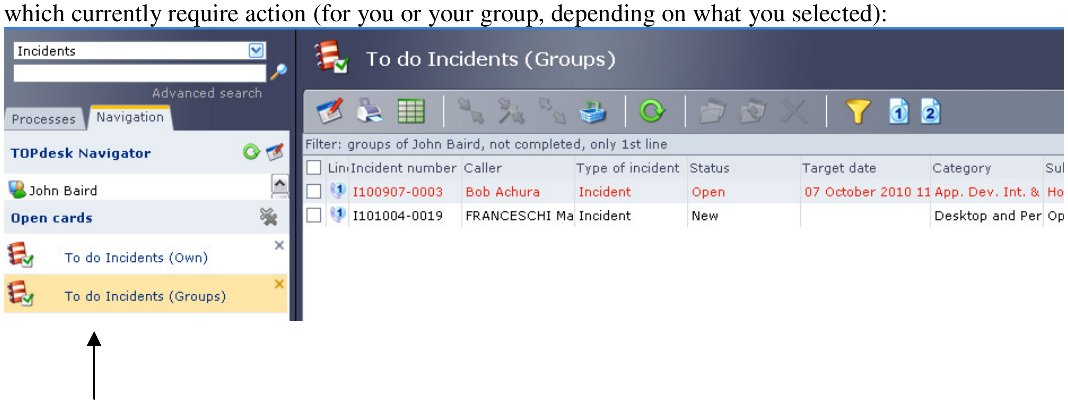


Viewing the to do list for yourself

To view **1st line** incidents assigned to yourself: In the table, click on the number corresponding to **1st Line** and **Own** (circled in red as shown on the right).



The right hand side area of the screen will switch from to overview page to a **to do list** with all incidents which currently require action (for you or your group, depending on what you selected):

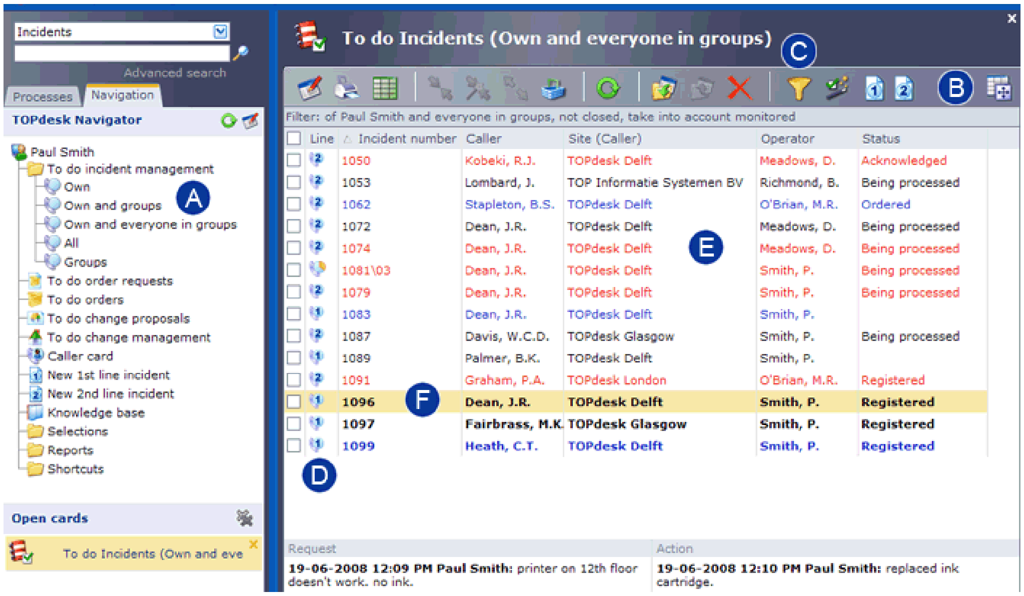


The **open cards** on the left hand side will also change to contain a new card, **To do Incidents** (followed by either **Own** or **Groups,** depending on what you selected above).

Using selections to view a customised to do list

Please see the chapter on **Selections** below in order to find out how you can customise your to-do list views.

To do list overview



A. The **Navigator** displays the quick links and open cards as described in the previous chapter. (Note the example shows an "Advanced to-do" list which can be activated in the User Settings.)

B. See the table below for what the **buttons** do. Also, you can **sort** by incident number, caller, target date, etc. by clicking on the top of one of the columns in the list.

C. The **Filter** option allows you to view only a certain selection of the list. The filter settings will be saved.

D. You can see whether an incident is a first line, second line or a partial incident by the icon which precedes the incident number.

E. When an incident is past its target date, it appears in red. If the target date is today, then it appears in blue. If the card was created today, then it appears in bold.

F. Highlighting one of the incidents in the list will cause the preview to update. Double clicking on a card in the list will open the Incident card. You can press SHIFT when clicking a card to open it in the background.

Buttons on the to do list

Edit - The highlighted card, or the one with it's checkbox ticked, will become editable.

Print example - Create a print example, which can then be printed.

Export – Export a list of the selected incidents to Excel.[1]

Link – Belongs to the UniDesk cart system.[2] Links an item.

Links wizard – Belongs to the UniDesk cart system. Starts wizard to link an item from cart.

Unlink – Belongs to the UniDesk cart system. Unlinks an item.

Add to cart - Belongs to the UniDesk cart system. Adds an item to the cart.

Refresh – Refreshes the view.

Archive - The card will no longer appear in the active card index box.

De-archive - Reactivate a card.

Filter – Lets you add specific criteria to filter the to do list.

Refresh - Carry through any changes you have made

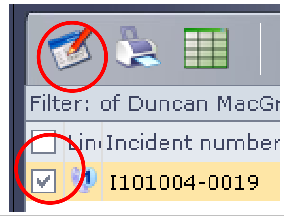
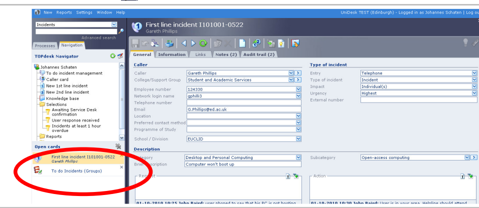
New first line incident – creates the same.

New second line incident – creates the same.

[1] See TOPDesk Enterprise Manual p.40.
[2] See TOPDesk Enterprise Manual paragraph 2.2, Cart System.

4. Opening an incident and viewing information

You first need to have a **to do list** open – see previous chapter. To open an incident:

Double-click the row of the incident in the **to do list**. You can also check the box in the row belonging to this incident and click the edit button.	
Open cards on the left hand side will show a new **card** (circled area). The right-hand side window will show the new **card** with the incident itself.	

Incident card overview

Escalation status and incident number

The very top of an incident card shows whether this is a **first line** or **second line** incident. You also see the incident number.

About incident numbers

- Every incident will have its own unique incident number. The incident number contains the date in American format (**yymmdd**) followed by a unique number.
- The incident 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.
- You can enter incident numbers into the **search box** to find calls.
- If you type (or paste) an incident number into a call's **action** or **request** field, UniDesk will automatically convert the number into a link which opens the card when clicked.

Buttons

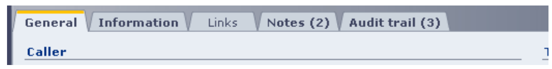
These are found below the incident number.

Save - Save the changes you have made.
Undo – Rolls back the last change.
Print example - Create a print example, which can then be printed.
Add to cart - See TOPDesk Enterprise Manual, Paragraph 2.2, Cart system.
Go to the previous card in the card index box
Go to the next card in the card index box
Refresh - Carry through any changes you have made
Create new incident – Will open a new card with a fresh incident.
Escalate or de-escalate – Button changes depending on whether you are viewing a 1st or 2nd line incident, and lets you either escalate or de-escalate.
Transfer – Opens a menu to let you transfer to a different college or support group.
New standard solution – Creates a new standard solution using the request data.
Open knowledge base – *Lets you copy data from the KB. This is not active yet.*

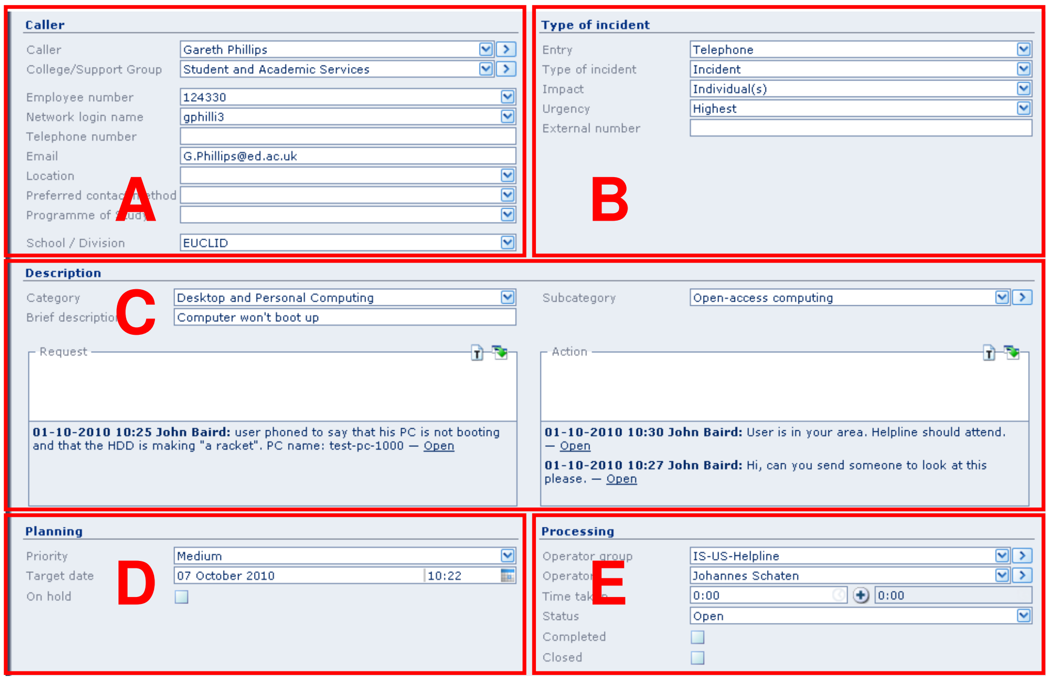
Tabs

These are found below the buttons. For the present we are mostly using the **General** tab.

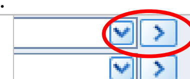
*Note: Emails which have been sent from this incident can be found on the **Notes** tab.*



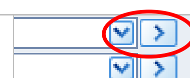
"General" tab overview



A shows caller information**.** This corresponds to *Customer details* in the old CMS.

Tip: To see more options corresponding to the **Caller** (for example to send them an e-mail), click on the arrow next to it and UniDesk will present a menu with additional options.	

B contains the **method of entry** (telephone, email etc.), the **type of incident** and **urgency** and **impact**.[3] We will discuss below how to fill these out – for the moment we are only viewing the incident.
C contains the **category, brief description, request** and **action** fields. The **request** contains the initial request. The **action** contains any action an operator has taken and any emails received by the incident.
D shows the **priority** and **target date** (*please note the target dates are not currently being used*).
E has the **operator group** (corresponding to *team* in the old CMS) and **operator**, the **time taken**, and not least of all the **status** of the incident.

Tip: To see actions corresponding to **operator group** or **operator** (for example to send them an e-mail), click on the arrow next to the pull-down menu and UniDesk will present a menu with additional options.	

Before and after
Comparing terms from the CMS and the UniDesk system (also see Glossary at the back):

- *Short Description* is now the **Brief Description**.
- *Full Description* is now the **Request** field.
- *Resolution diary* does not translate well; **Action** should have any actions undertaken to resolve the request, **Request** should have any further requests.
- The *Email* tab: Any incoming emails will be shown in the **Action** field. Sent emails can be found on the **Notes** tab.
- *Resolver* is now **Operator** whereas *Resolving Team* is now **Operator group**.

[3] See the *Incident Mgmt Process Manual* for further information on types of incident and prioritising.

5. Creating an incident

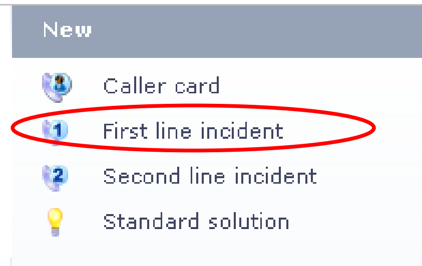
This chapter details how to create an incident. UniDesk has two kinds of incident:

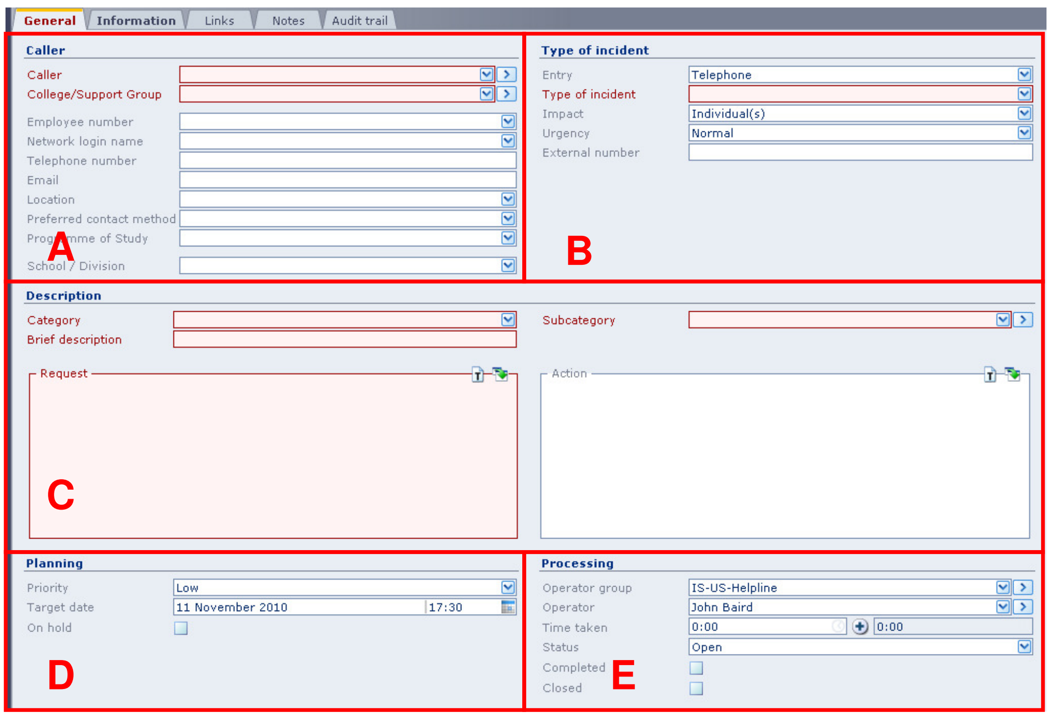
1. **First line incident**: We are able to resolve by ourselves. For example, a user phones in and the Operator is able to resolve it while the user is still on the line. Note that a first line incident can always be "raised" or "escalated" into a second line incident when it is necessary.
2. **Second line incident**: We are recording the incident but aren't able to solve it ourselves.

You can create a new incident in several ways, e.g. :

- In the **Navigator** on the left hand side, select the **Processes** tab and **Incident management**
- Under **New** on the right of the screen, click on **First line incident**. (We're using a first line incident in this example.)

A blank template will be created for you to fill out the required details:

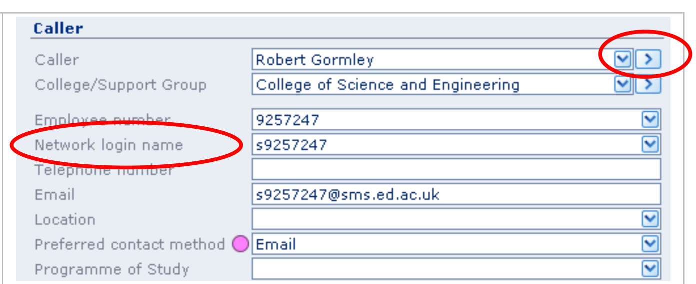




Some boxes, i.e. the "Request" field above, have a red background to show that they are **mandatory** fields. The incident cannot be saved until they have been completed.

(**A**) **Caller** details. Getting the caller's University Username (**UUN**) is the best way to do this. UniDesk refers to the **UUN** as **Network login name**. This in will fill out most of the other details.

Tip: The little arrow next to the **Caller** lets you see further options such as **Find** and **Create Person**.



(**B**) **Type of incident**. The appropriate **Type of incident** must be selected from the drop-down menu and it is initially left blank.

Entry, **Impact**, and **Urgency** all have defaults. These can be changed if necessary using the drop down menus.

Types of Incident

From the ITIL Glossary (see http://www.ed.ac.uk/is/ITIL)

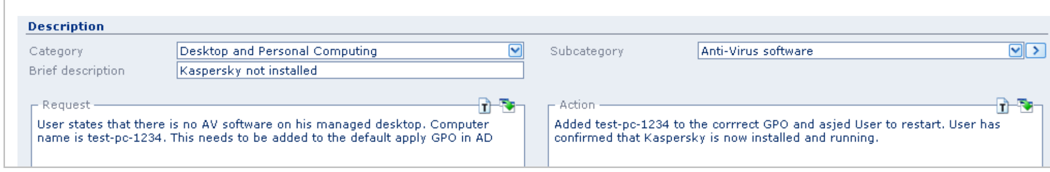
- **Incident***:* Any event which is not part of the standard operation of a Service and which causes, or may cause, an interruption to, or a reduction in the quality of, that Service.
- **Service Request**: A request from a User for information or advice, or for a Standard Change. Service Requests are usually handled by a Service Desk, and do not require a Request For Change to be submitted.
- **Request for Change**: A formal proposal for a Change to be made. An RFC includes details of the proposed Change, and may be recorded on paper or electronically. (Note RFCs are only present until the UniDesk Change module is implemented.)

Impact and Urgency

See Chapter 3.3. Prioritization in the *Incident Management Process Manual*. Copied here:

- **Impact options:** Individual(s), Dept/Location(s), University. The scope of the incident should be determined and the impact set appropriately. If only one or a few people are affected, use Individual(s). If an entire unit or location is affected, or multiple units or locations, then select Dept/Location(s). If the entire University is impacted, select University. The default is Individual(s).
- **Urgency:** ranges from Normal to Highest and must be discerned from the context of the incident. If the incident is completely stopping the user from doing their work this may take higher urgency than if the incident is only mildly affecting the user's work.

(**C**) **Description**. In this section, all of the details except **Action** are mandatory. The selection you make from the drop-down menu for **Category** will define the selections you are offered under **Subcategory**. **Brief description** should be used to summarize the incident and **Request** is used to add extra details. **Action** is used to describe what has been done to resolve the incident.



Categories and Subcategories

Incidents must be assigned a category and subcategory based on the involved services. The categories are based on the **Service Catalogue**. See https://www.wiki.ed.ac.uk/x/OGMPBg

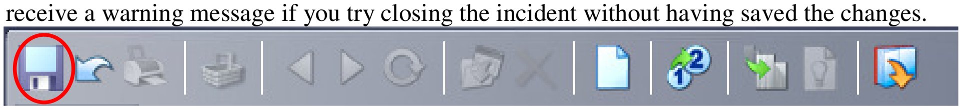
Did you know? The IS website is structured according to the Service Catalogue. The "service guide" http://www.ed.ac.uk/schools-departments/information-services/services shows this.

(**D**) **Planning** does not require any input from the Operator. **Priority** is created automatically as a result of the **Impact** and **Urgency** selections made in **B** and the target date is generated by the system assigned priority.

(**E**) **Processing** contains the **Operator group** and the **Operator** information. This area can also be used to show the **Time taken** to resolve the incident. This is also where the incident can be closed by changing the **Status**.

In the screen below, the incident has been resolved while the **Caller** was on the phone and confirmed that the resolution worked. We can change the **Status** to **Closed via user confirmation**. Note that this action also causes the **Completed** and **Closed** boxes to be ticked, and a date and time stamp added.

Lastly, **whenever you have made any changes**, the incident must be **saved** by clicking the floppy disk icon on the toolbar at the top of the screen. You cannot accidentally close an incident however: You will receive a warning message if you try closing the incident without having saved the changes.



Incident Status on UniDesk

- **New** - Created by incoming email - DO NOT USE!
- **Open** - currently being worked on.
- **Waiting on User** - Asked user for more info (e.g. Machine name) UniDesk places the incident **On Hold**.
- **Waiting for 3rd Party** - Information or action required by external organisation. UniDesk does **NOT** place the incident **On Hold** as we are responsible for chasing the 3rd party.
- **Scheduled Work** - DO NOT USE! (Its there for St Andrews)
- **Resolved By 2nd Line** - 2nd line have completed work on the incident. 1st line check that all aspects of the incident have been dealt with and if not return to 2nd line for completion. If so, the status should be changed to **1st Line Confirmed Resolution**.
- **1st Line Confirmed Resolution** - 1st line has checked that all aspects of the incident have been dealt with. Status triggers an editable email to request confirmation from the user. After a set period of time without a response, UniDesk will automatically change this status to **Closed Without User Confirmation**.
- **Closed - User Confirmed** - User has responded saying that they are happy the incident has been resolved or, for incidents never escalated to 2nd line, the service desk presumes user confirmation.
- **Closed Without User Confirmation** - Set automatically by UniDesk where a user hasn't confirmed resolution, or manually when a user has not responded to requests for further information so that their request may be processed (e.g. we've asked for their machine name and they haven't responded).

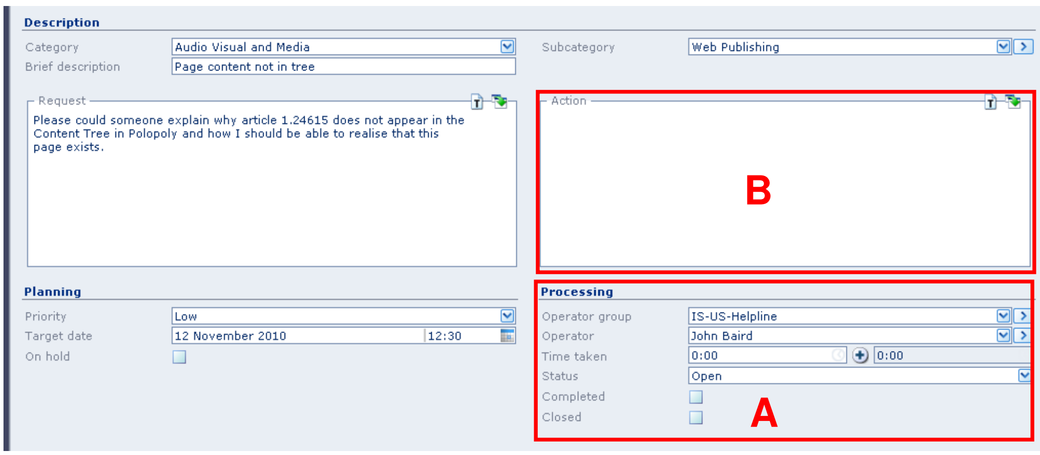
6. Passing and escalating incidents

This chapter describes how to pass incidents between **Operators** and **Operator groups** and how to **escalate** (i.e. raise) an incident to a 2nd line status.

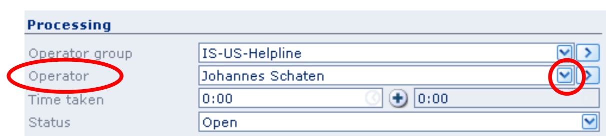
Passing between Operators and Groups

Passing to another operator

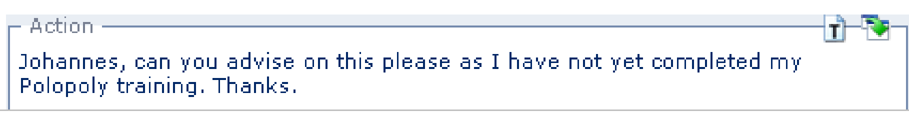
The incident shown below can be resolved at 1st line, but requires another group member to action. We will **pass** to another group member, but **not escalate**. It remains a first line incident.



(**A**) allows you to assign the current **Operator**. To assign the call to another member of the group, click the drop-down menu next to the **Operator's** name and select the appropriate name from the list.

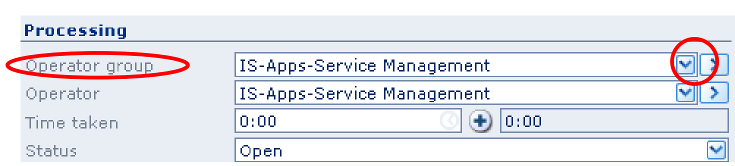


(**B**) is the **Action** area (*the "Resolution Diary" in old CMS*). When you pass a call you update this area with information, noting any steps you took to resolve the incident and the reason for passing.



Passing to another operator group

To assign an incident to another **Operator group**, click the drop-down menu next to the **Operator group's** name in (**A**) and select the appropriate group name from the list.



Note that in this case, the **Operator** name is changed to match the **Operator group.** This is because best practice is that the **Operator group** passing the incident **should not** assign it to an individual in the other group.

You must enter details relating to why you have passed an incident to another **Operator group** in the **Action** area (**B**) so that your colleagues are aware of any steps that have already been taken to resolve.

Escalating incidents to 2nd line

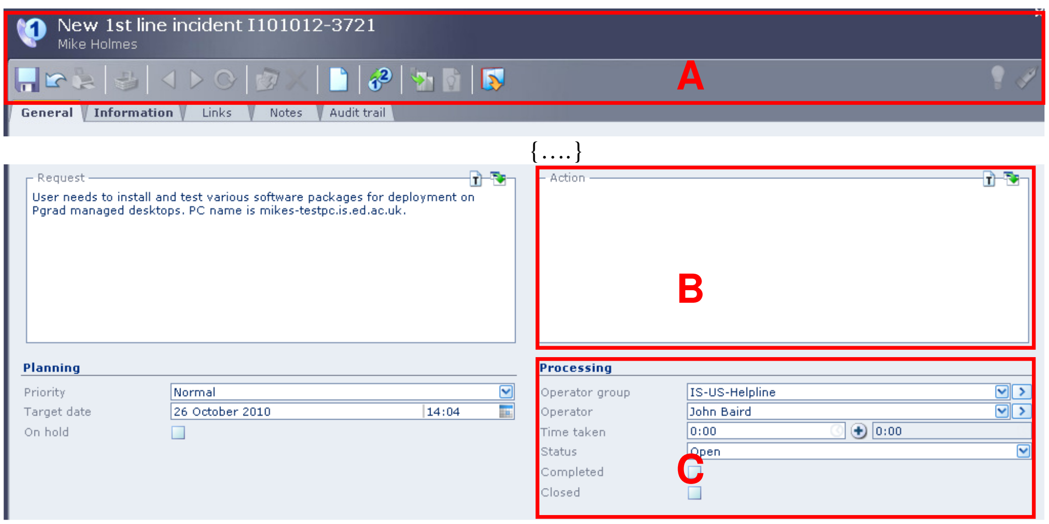
The following example describes an incident which needs escalating. It requires an action which can only be completed by a 2nd line group.

Pass VS escalation
In old CMS it was possible to pass to another "resolver" or "team". UniDesk lets you **pass** but also **escalate** to 2nd line, which isn't the same thing. Three possible scenarios result:

1) *You can **pass** a call but **not escalate**.*
IS Helpdesk, who run a first line support, receive a first line incident which is meant for IS Helpline, who also run a first line support. The incident is only *passed* to IS Helpline.

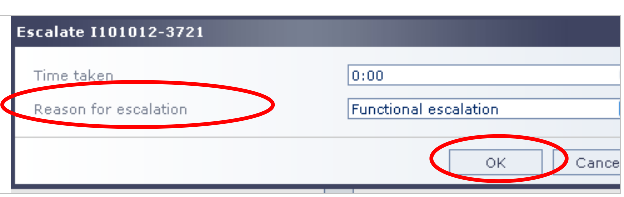
2) *You can **pass** a call **and escalate**.*
IS Helpline, who run a first line support, receive a first line incident which needs action from a second line group. The incident is *escalated* and then *passed* to the second line. It's not possible to make an error here since if you do not escalate the incident first, UniDesk will not display second line groups in the list of choices of where to pass.

3) *You can **not pass** a call **but escalate**.*
IS Helpline contain both a first and a second line within the same team. A HTBN staff member who cannot resolve an incident, but knows a "core staff" member can, will *escalate* the call to 2nd line but set "IS Helpline" as the group.



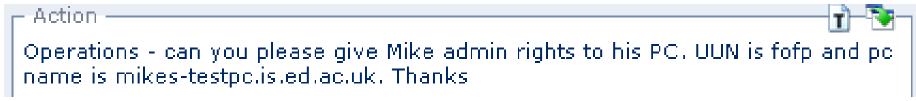
Section (**A**) shows information about the incident, including incident number and its 1st line status. You escalate the incident to 2nd line by clicking the **1-2** icon on the toolbar below the header.

The escalation button will open a window where you can input the **time taken** on this incident, and the **Reason for escalation**. Note that the **Reason for escalation** is mandatory and must be completed.

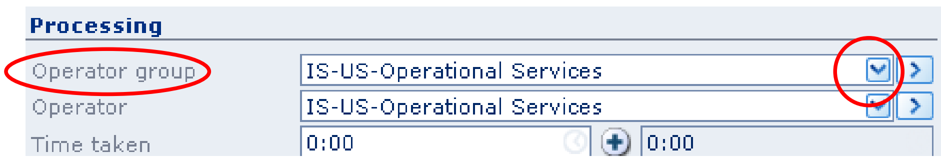


Functional is used when 1st line are unable to proceed because the resolution falls outside their remit. **Hierarchical** is used when it may be necessary to get managerial authority to proceed. In this example we have chosen **Functional escalation**, once this is selected click **OK**.

As with passing incidents between Operators or Operator groups, it is vital to enter the details in the **Action** area (**B**) explaining why the incident has been escalated.



Clicking on the **Escalation** icon will clear the **Operator group** and **Operator** fields in (**C**). You will need to choose the 2nd line group to which the incident is to be escalated. Click on the **drop down menu** for **Operator group** and make your selection.



You can now save the incident by clicking the **floppy disk** icon on the toolbar.

The incident has now been ***escalated** and **passed***. This will remove the incident from the 1st line **To do** list and transfer it to the chosen 2nd line team. Notice that the header in section (**A**) also now changes to reflect the escalation to 2nd line.

Accidental escalations

You can de-escalate an incident yourself again by clicking the **escalation button** – for second line incidents this turns into a **de-escalation button** which is however in the same location.

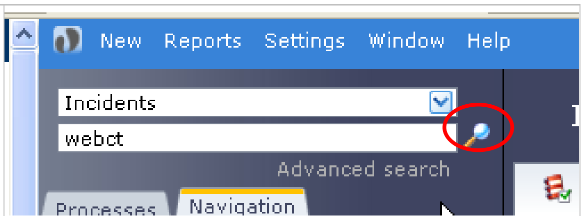
2nd line Operator groups may deescalate calls that have been escalated prematurely, have the incorrect assignment or have been escalated unnecessarily. On de-escalation, UniDesk will email the operator who escalated the incident and the relevant operator group manager. (*Process manual Chapter 3.10.1*)

7. Searching UniDesk

UniDesk allows you to search for incidents, knowledge items, persons or groups. For our purposes, we will concentrate on incidents and persons (users).

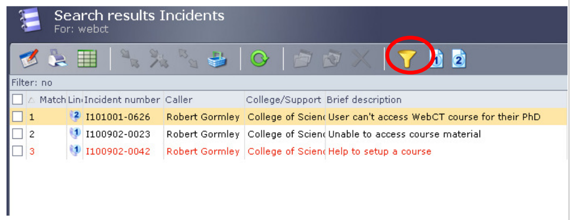
UniDesk presents the **Search** function in the top left-hand corner.

To search for incidents, leave **Incidents** selected and enter a search term. Then hit Enter or click on the **magnifying glass**.



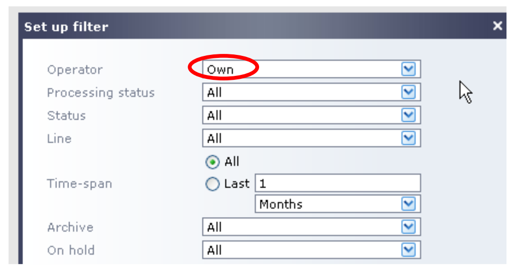
Your search results will appear under the **Navigation** tab. Click on this tab if necessary.

To reduce the number of matching results, click on the **filter** icon.



Using **filter**, you can narrow down your results. You can, for example, see only calls that were assigned to you by changing **Operator** to **Own**.

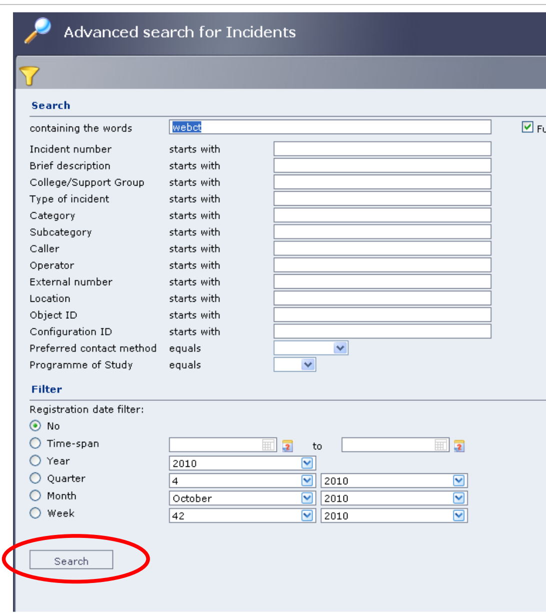
You can also narrow down using a range of other criteria.



Advanced Search is also available from the top-left hand corner.

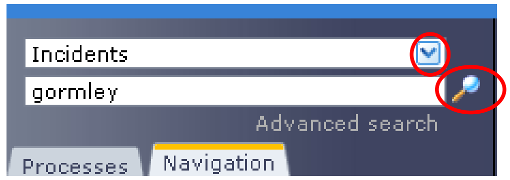
A large range of options is available for **Advanced search**.

Once you are happy with your search terms, click **Search**.



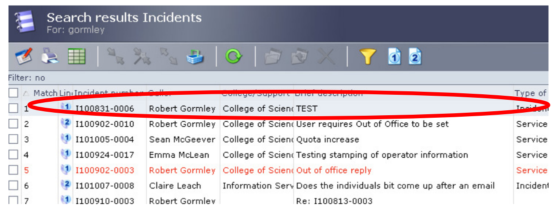
Searching incidents by user / Requesting action from Operator

If a user would like an update on an incident, you find the incident using the search function.
Select **Incidents,** enter the user's name (*or username*) in the box below, then click the **magnifying glass**.



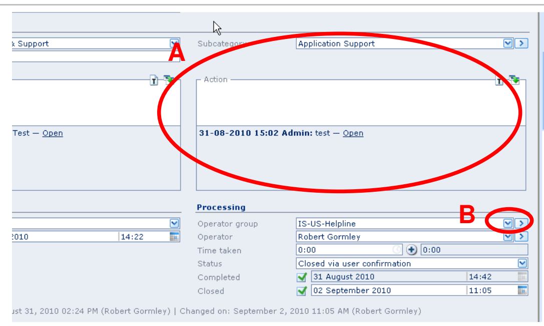
On the results list, double-click the incident which the user is enquiring about.

Note You could also have typed the incident number into the search box in the step above.



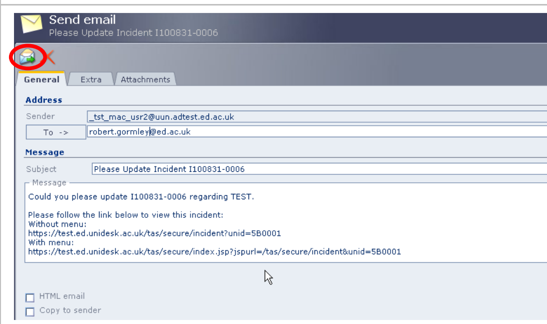
In the incident screen, progress on the incident will be listed in the **action** box (**A**). If sufficient information is available, you can advise the user with this.

If not, you should **request action from the operator**. To do this from within UniDesk, click on the right-arrow beside the operator's name (**B**).



After you click the arrow, select **Request action from Operator**.

This will bring up a template e-mail to the current operator. You can modify the template if you wish. Once you are happy, click **send**. This will remind the current operator to update the action field, so that you can then update the user on the progress of the call.



8. Miscellaneous

Entering hyperlinks into UniDesk fields

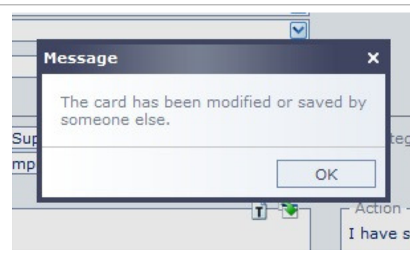
You can include links to other incidents in the memo fields cards (‘Request’, ‘Action’, ‘Comments’, etc.) by noting the incident number. When you save, the number you have entered will become clickable. Note – this type of linking has nothing to do with “linked incidents” or “partial incidents”.

The incident number must correspond with the format used. Our incident numbers contain the date in American format (yymmdd) followed by a unique number. When you click on the link in the memo field, the card with the relevant number will open. If UniDesk does not recognize the incident number, you will receive notification.

You can also enter hyperlinks and FTP links in memo fields (‘Request’, ‘Action’, ‘Comments’, etc.). See example below. The links will be opened in a new window.

Two operators simultaneously editing the same incident

As with the old CMS, it is possible that two people simultaneously enter information into the same call. Care must be taken to assign incidents to oneself before working on them.

You will see a message if this happens, “The card has been modified or saved by someone else.” If you click **OK**, the card or your edits will NOT disappear, i.e. you can use copy and paste to “rescue” any information you entered so far.	

Alternate email addresses

You can assign an alternate email address in the **Person** card of a user, on the **Private** tab.

Deleting calls

In the current configuration, only Service Management can delete calls.

How to attach a file to an incident

On the incident card itself, click the **Notes** tab and select **Document Overview** and click **Attach file**.

9. Selections

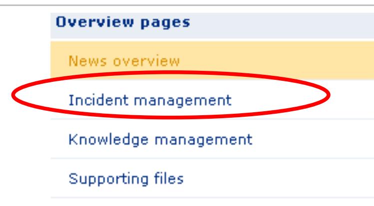
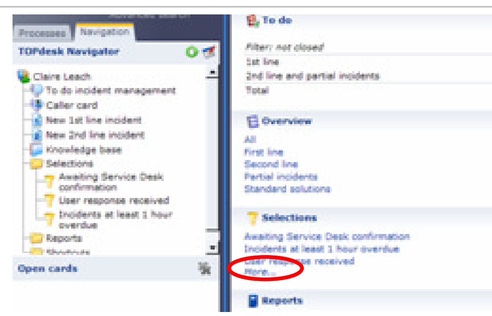
In Unidesk, all incidents for library sites will go into one group - ‘Help at Sites’. In order for each library site to view its own incidents, each call will be assigned a location. Someone will check emailed incidents each day in order to sort the calls between sites. If you create an incident yourself, please assign a location on the incident card, so that you can easily find it later.

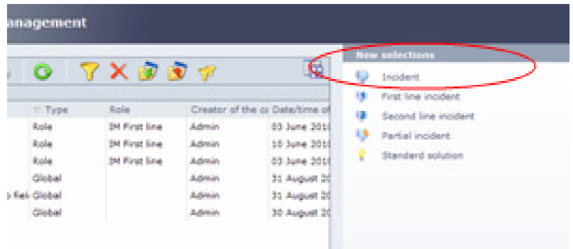
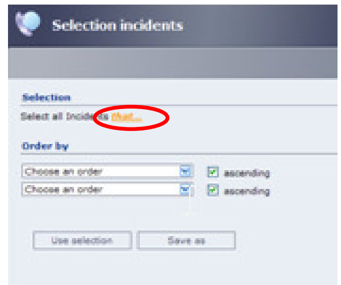
The instructions below detail how to create a selection by **location**, but can be used to create a selection on other criteria as required.

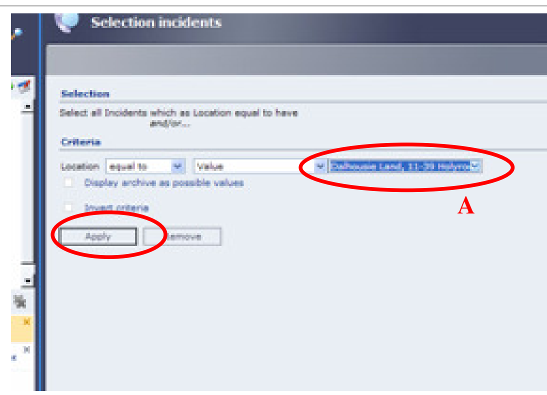
Library Locations

Darwin Library	Darwin Library
EBVC Library, Vet Library and Roslin	Easter Bush Vet Centre
JCM Library and Robertson Library	JCMB
Law Library	Old College
LRA	Library Annexe Unit
Main Library	Library, George Square
Moray House Library	Dalhousie Land
New College Library	New College
Royal Infirmary Library (RIL)	Chancellors Building
Scottish Studies Library	George Square 27-29
WGH Library	WGH 4s Library

Section 1 - Creating a Selection

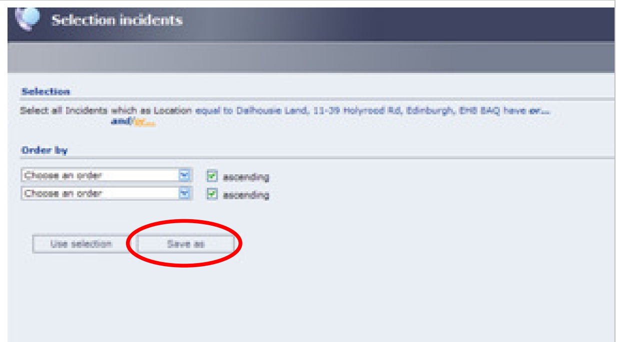
Navigate to the UniDesk homepage. Now click on “**Incident Management**” in the left-hand navigation pane to open UniDesk Incident Management.	
Under the **Selections** section, click on “**More**”.	

<table>
<tr>
<td>At the right hand side under ‘New selections’ click on “Incident”</td>
<td>
</td>
</tr>
<tr>
<td>Click “Select all incidents that…’</td>
<td>
</td>
</tr>
<tr>
<td>Click “Location” in the Caller section</td>
<td>
</td>
</tr>
<tr>
<td>Change the third box (highlighted A) to your chosen location using the drop-down arrow.

Click on "Apply”.</td>
<td>
</td>
</tr>
</table>

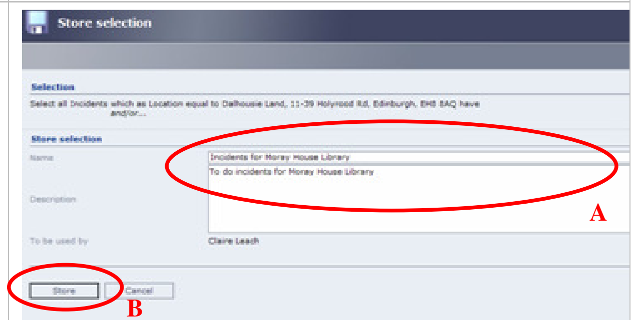
The next screen gives you an option to add criteria for multiple selections (see section 2) or to save your selection.

Click “**Save as”.**

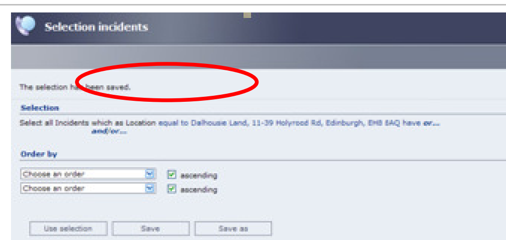


The next screen allows you to choose a name for the selection, and enter a description (box A).

Do so, then click “**Store”** (Box B**).**



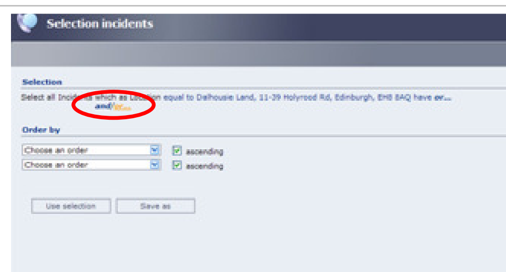
The next page confirms that your selection has been saved.

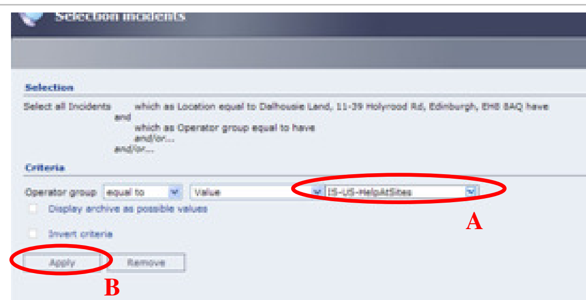
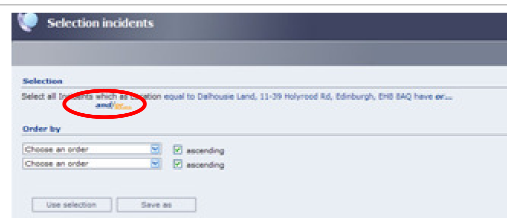
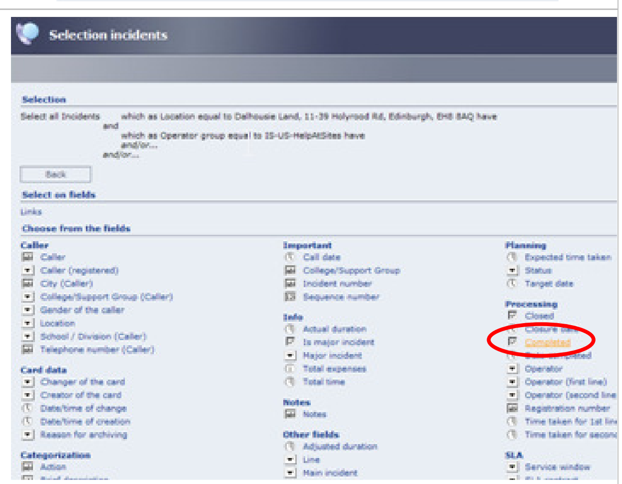


Section 2 – To create a ‘multiple’ selection

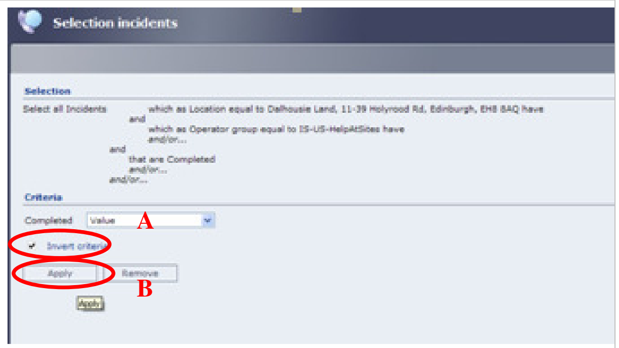
Other groups may also assign a location to calls. From your simple site selection you can choose to order the list by Operator Group by clicking on the correct heading. However, there is a way to set up open calls only, for your location, by operator group. It does mean that you will not see calls that have been passed on, but you could also choose ‘Creator but not current operator’ or ‘All incidents where I have added to the memo field’ instead of your selection – so they don’t completely disappear.

Once you have added your location to the selection (or, any other single criteria) as above, click **“and”**.



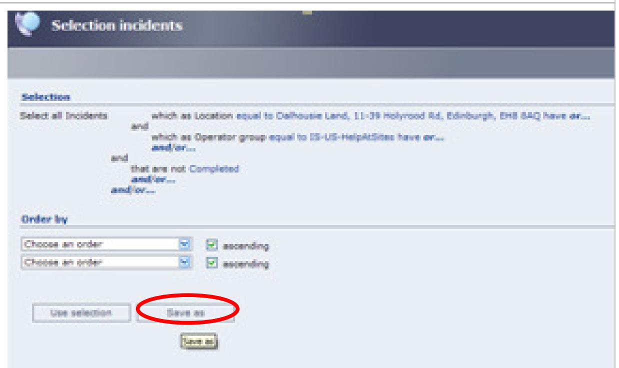
Select “**Operator Group**”.	
Begin to type in your operator group into the third box – marked “**A**” - and the box will auto-complete. Do not use “**currently logged in”** as it does not work. Click on “**apply”** (**B**)	
Once again click on **“and”.**	
This time, under Processing, click “**Completed”** – you will see there is no option for Open calls	

This time **click** the “**Invert criteria”** box (A) to get calls that are not completed, then click ‘**Apply**’ (B).



Your selection has now been built. You can add more, or different, criteria if you wish.

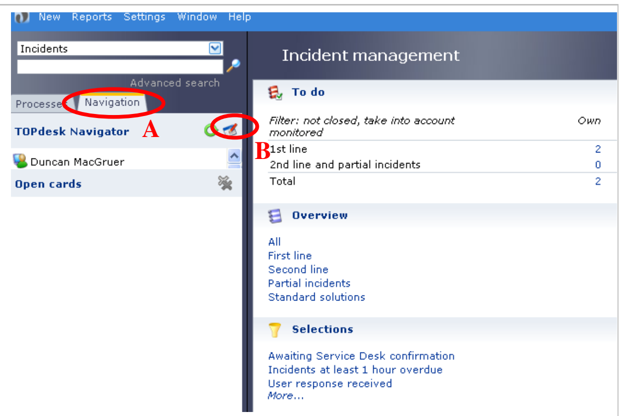
Click “**Save As”,** then give your selection a title and description as before.



Section 3 – To view selections

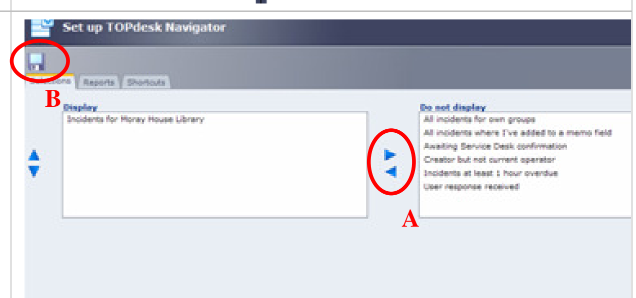
Navigate to the UniDesk Navigation screen (A).

Then click on the **“Edit”** button (B).

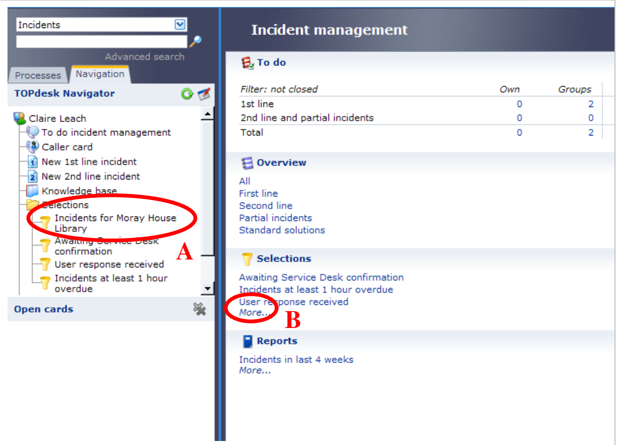


Move the selections that you wish to view from the right to the left hand box using the **directional buttons** (A)

When you are done, click on the “**save”** icon (B).



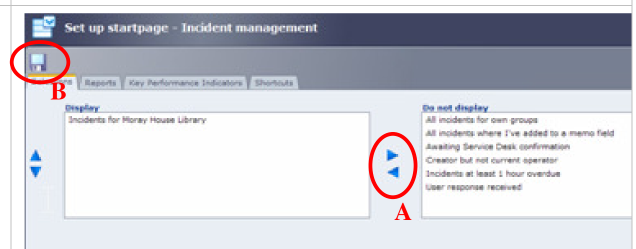
You can now see your selections in the UniDesk Navigation pane on the left (A), but would still need to click "**More**" (B) under selections to view them in the main Incident Management pane.



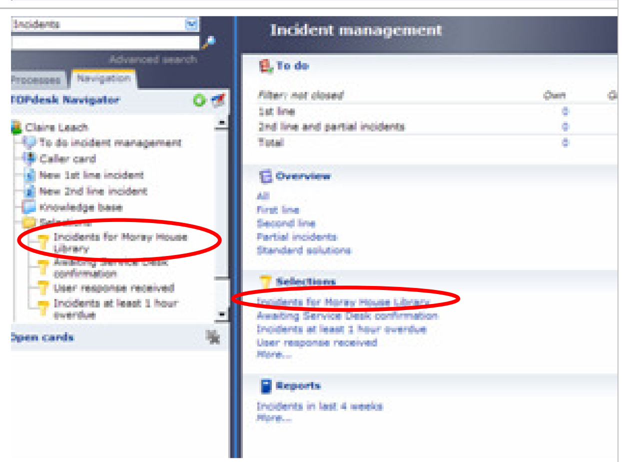
Click "**Customise this page**" below the Reports section.

Move the selections that you wish to view from the right to the left hand box using the **directional buttons** (A)

When you are done, click on the "**save**" icon (B).



You will now see your selections in both the Navigator and the Incident Management pane.



10. UniDesk Glossary

Term	In old CMS	Explanation
Incident	Call	An 'Incident' is any event which is not part of the standard operation of the service and which causes, or may cause, an interruption or a reduction of the quality of the service.
Card	(Window)	Any UniDesk window, such as an incident, a To Do list, a report, etc. can be a card. Currently open cards are shown in the Navigator on the left hand side under "Open cards".
Navigator	(Left hand side menu)	You can see lists of incidents for you and your Operator group.
To Do list	"Resolving" list (whether own, or team)	The To do list displays all current incidents that are assigned to a particular operator.
Own (in to do list)	"calls for Duncan MacGruer"	As in, "your own" incidents. "Own" is used to indicate ownership i.e. incidents assigned to you.
Groups (in to do)	"calls for is-helpline"	Groups (in to do list) means incidents assigned to your team, but not assigned to an individual operator.
Unassigned	N/A	Calls without an owning group.
Person / Caller	Customer	“User” in ITIL terms.
Operator	(Resolver)	Support staff using UniDesk.
Operator group	Team	
Brief description	Short Description	
Action area	Resolution Diary	
Request	Full Description	
Impact	N/A	Number of users affected.
Caller card	(Quick call)	Quick logging e.g. while on phone,
Urgency	N/A	Based on how much an issue prevents the user from carrying out their work.
Processes	N/A	UniDesk modules. Currently only Incident Management is available.
Self-service portal	N/A	Will go live in a later phase. Web portal for users to raise new incidents and view open requests.
Knowledge Base	N/A	Will go live in a later phase. Support staff and users can view solutions to known issues.
Service request	N/A	A request from a user for information or advice, or for a Standard Change.