Creating UniDesk Users/Operators and Adding/Removing them from Operator Groups.

Users and Operators

There are two components to setting up a new staff member in UniDesk: the user, and the operator.

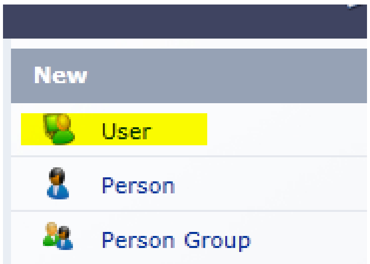
The User is a login account, where you set permissions (roles) and assign the correct categories.

The Operator card is what other people see in the system: when you pass incidents, you are passing them to the Operator. Visibility of Operators is dependent on what ‘tasks’ the Operator is available for, such as 1st or 2nd line Incident Management or even Problem Management.

To complete a User/Operator setup, Operators are linked to their matching User, and also linked into the appropriate Operator Group.

How to set up the User

Note: Before you create a new User/Operator you should make sure they don’t already exist in the system. (They may have already worked in other teams, for example).

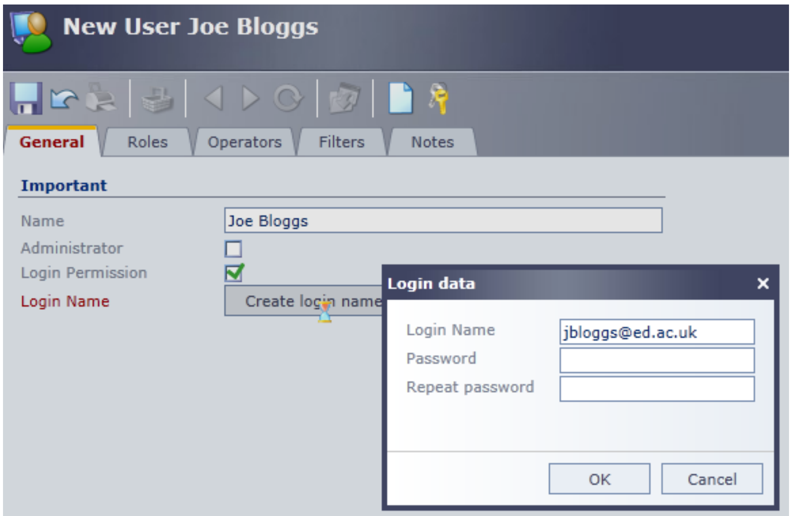


To create a User, go to Supporting Files in the Process View, and click User, from the ‘New’ pane on the right of the page.

You will then see a new user card. Enter the Name for the user, and click 'Create Login Name'.

Enter the user as UUN@ed.ac.uk into the login name field for the user, where ‘UUN’ is the correct username.

The @ed.ac.uk bit does not make this an email address, although it might look like one: it’s set that way so that the federated access system (Shibboleth) knows the full domain for the username (ed.ac.uk)



The user will not use the password that you set, because their entry to the system will be authenticated via Shibboleth. It can even be left blank. Click OK when done, and then SAVE the user.

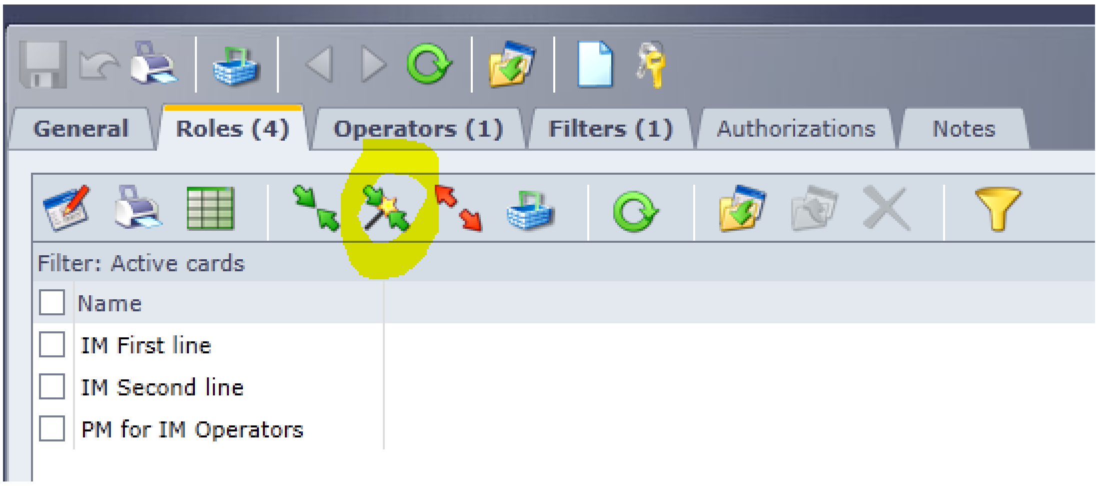
Once the User has been saved, you will be able to access the other tabs. You need to add Roles and the appropriate Category filter at this time.

Roles

Roles are permissions to use different areas of the system. You want to give permissions to the bits of the system that your new User will need to access.

For many teams, this will include just IM First Line, and IM Second Line. It may also include PM roles if your team is involved with Problem Management. In the future, there may be Change and Release roles to consider as well.

Use the 'Links Wizard' button to add selected Roles to a User.



Things to remember:

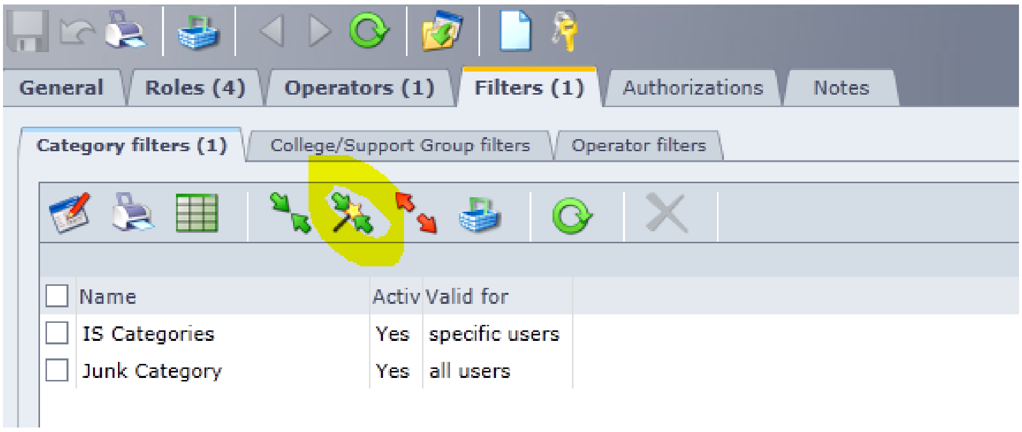
- If you are managing a Second Line only team, then you should not add the IM First Line role to your Users.
- If you are in a team which does Problem Management, your users should have the PM Problem Operator role. However, they will only need the PM Problem Management role if they are actually Problem Managers (see this list: https://www.wiki.ed.ac.uk/x/Vx9HBw)
- Incident Operators who need to interface with Problem Management, for example to link Incidents with Problems, should add PM for IM Operators.

You should not add IM or PM Report roles, or any other roles, without explicit guidance.

Category Filter

The Category Filter controls which list or lists of categories a User will see. Everyone gets the 'Junk' category automatically. You should also add the correct Category Filter for your group, to each user in your group.

Under the Filters tab, select the Category filters sub tab. Use the 'Links Wizard' button to add the correct Category Filter(s) to a User.



Troubleshooting tip: if an Operator complains that they can only see the Junk Category, it's a good bet that they do not have correctly set Category Filters!

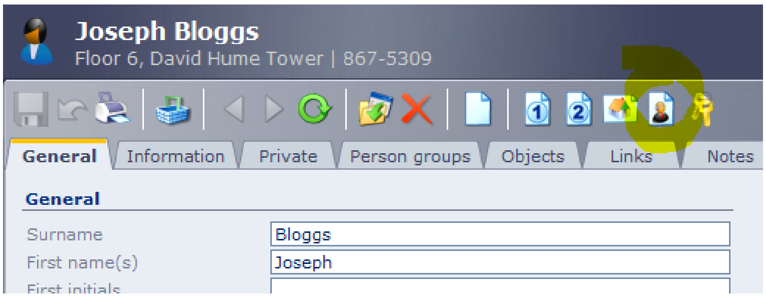
You should not add filters in the Operator Filter or College/Support Group Filter areas.

With the Roles and Filters set up, you are ready to create and configure the Operator.

How to set up the Operator

Creating an Operator

You can create an operator from an existing Person card. Using a Person card to create an operator saves you manually keying this information, as it will usually be the right information. (**Note:** This is just a timesaver - there are no links between persons and users/operators, other than that they contain roughly the same information.)



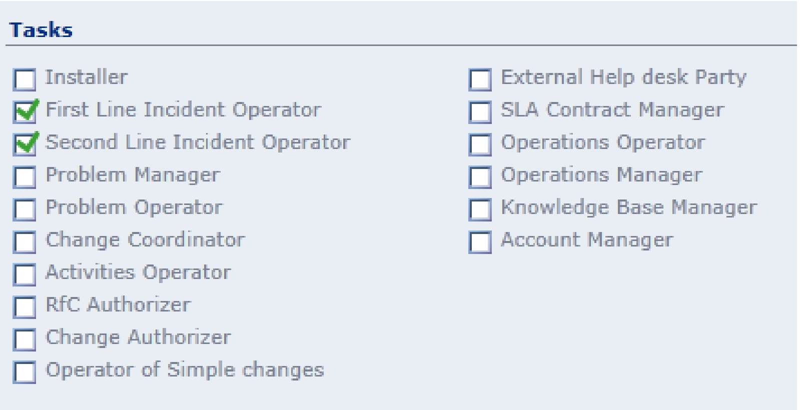
Find the Person Card using Search, and then open it. Click the 'Assign New Operator' button.

Fill any missing information into the Operator Card, and make absolutely sure that the email field is correct. Save it, and then continue editing.

You will need to add Tasks, and link the Operator to the appropriate User.

Assigning Tasks

You will need to assign appropriate tasks to the Operator, using the checkboxes. For many teams, this will just be First Line Incident Operator, and Second Line Incident Operator. Teams dealing with Problem Management will need to assign those Problem tasks as appropriate.

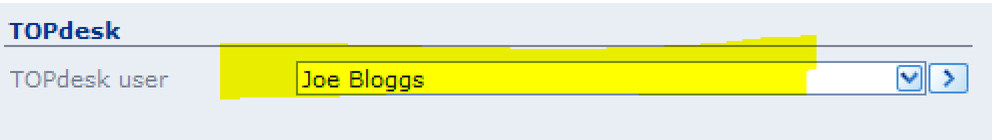


Things to remember:

- If you are managing a Second Line only team, then you will not need to tick the First Line Incident Operator for your Operators.
- If you are in a team which does Problem Management, your Operators should have the Problem Operator task ticked. However, they will only need the Problem Manager task if they are actually Problem Managers (see this list: https://www.wiki.ed.ac.uk/x/Vx9HBw)
- IM Operators who need to interface with Problems, but not create and manage them, do not need the Problem Operator role.

Linking the Operator to the User

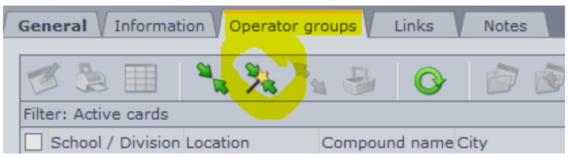
The final step in creating a User/Operator is linking the User and the Operator together. This is done with the TOPdesk user field at the bottom of the Operator card.



When this is done, save the Operator. This link should now be set up, and should also show up in the Operator tab of the User record as well.

You're ready to add your new Operator to an Operator Group.

Adding an Operator to an Operator Group



In order to add an Operator to an Operator Group, you actually need to *link* the Operator to the Operator Group. You should do this from the Operator Groups tab of the Operator card.

Use the 'Links Wizard' button to bring up a list of Operator Groups. Then select the correct Group from the list, and click 'Link' to finish.

Hidden Teams

If you need to add an Operator to a Hidden Team, please contact the IS Helpline when you have finished the steps above, and ask to have the correct Hidden Team setup done for that Operator.

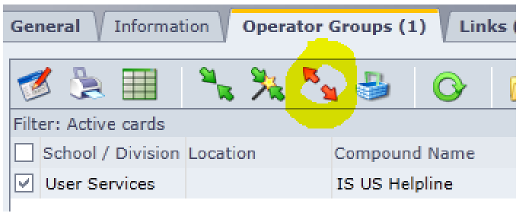
Removing an Operator from an Operator Group

To remove an Operator from an Operator Group, you simply need to unlink the Operator from that Group.

However, if the Operator is not a member of other groups, has left the University, or will no longer use UniDesk, you should also archive the Operator. Doing so will mean that nobody can assign incidents directly to that Operator any more, whether they are in an Operator Group or not.

Unlinking the Operator from a Group

To unlink the Operator from a Group, go to the Operator Groups tab of the Operator card. Select the Group to unlink from, and click the red 'unlink' button. Confirm the Selection to unlink.



Archiving the Operator

To archive an Operator, open the Operator card and then click the Archive button. Choose 'No longer valid' as the reason for archiving.

You should not do this if the Operator is still active in other Operator Groups.