

# TOPdesk Basic Training

# TOPdesk

## Basic Training

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# Creating calls

## 1.1 Getting started with TOPdesk

The TOPdesk login screen has two options: **Operator Login** and **Use Self-Service Portal**. The Self-Service Portal is TOPdesk's web portal for employees of the organization or for its customers. Here, they can register their calls or look up information. You are an operator when you process calls in TOPdesk. With processing we mean the entire procedure '**Create call > Choose Operator > Make overview > Note action, close > send e-mail**'. The step **Create call**, in most organizations, can occur in three different ways:

1. Via the Self-Service Portal
2. Through mail import
3. By calling the service desk


In this training we will focus on the third option.

### Exercise 1

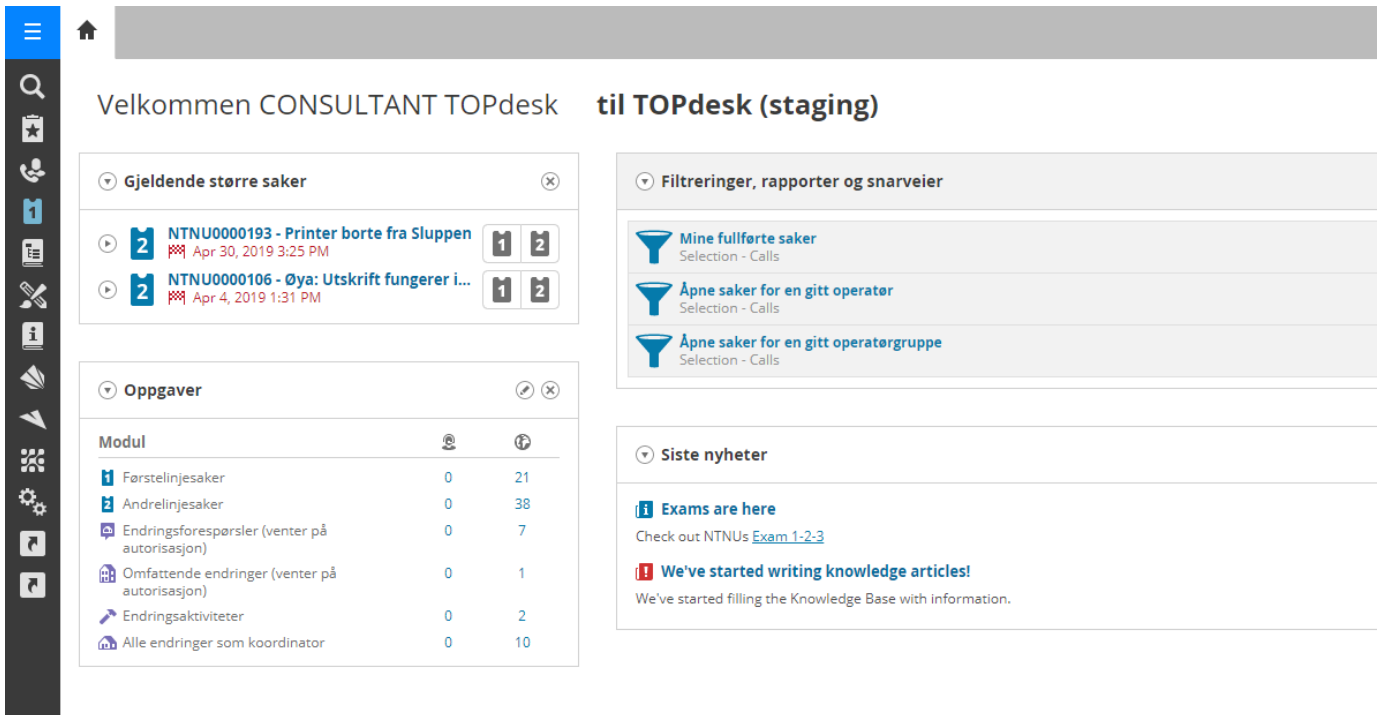
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- Today you will be working in TOPdesk to process calls. You can log in in the **Operator's Section** Use the name and password provided.

## 1.2 Start page

After logging in, you will see TOPdesk's **Start page**. Click  in the upper-right corner of your screen to see the username with which you are logged in. You can find the following on the Start page:

- The Quick Launch Bar immediately performs frequently used actions
- Tasks current tasks you need to process
- Latest news messages relevant to you
- Shortcuts shortcuts to reports, selections and web pages
- Buttons that open the Plan Board, Task Board, Dashboard and Help & Support site



Velkommen CONSULTANT TOPdesk til TOPdesk (staging)

**Gjeldende større saker**

- 2 NTNU0000193 - Printer borte fra Sluppen  
Apr 30, 2019 3:25 PM
- 2 NTNU0000106 - Øya: Utskrift fungerer i...  
Apr 4, 2019 1:31 PM

**Oppgaver**

Modul		
Førstelinjесaker	0	21
Andrelinjесaker	0	38
Endringsforespørsler (venter på autorisasjon)	0	7
Omfattende endringer (venter på autorisasjon)	0	1
Endringsaktiviteter	0	2
Alle endringer som koordinator	0	10

**Filtreringer, rapporter og snarveier**

- Mine fullførte saker  
Selection - Calls
- Åpne saker for en gitt operatør  
Selection - Calls
- Åpne saker for en gitt operatørgruppe  
Selection - Calls

**Siste nyheter**

- Exams are here**  
Check out NTNUs [Exam 1-2-3](#)
- We've started writing knowledge articles!**  
We've started filling the Knowledge Base with information.

## 1.3 What is a call?

Questions, requests, complaints and disruptions can be logged in TOPdesk as a new call. Open the call card to create a new call.

### **What does a call consist of?**

It differs per organization which field can be filled in. It could look different in your organization. Here, we describe which fields will be on your Call card during this training

On the left of the card you can see five blocks of information that you will need to enter once. On the right, you will see information that you can add during processing.

**1. Innringer (Caller):** the person who creates the call. When the name and possibly the organization of the person is entered, TOPdesk will add the other details automatically.

### **2. Detaljer (Details)**

**Sakstype (Call type):** the call subject, such as a malfunction or a request.

**Kategori/Underkategori (Category/subcategory):** a categorization using two key words. You can create reports using these fields.

**Eksternt nummer (External number):** the number used to identify this call in another system.

### **3. Objekt (Object)**

Here you will indicate which object or room is related to the call. TOPdesk already knows these objects and rooms.

### **4. Planlegging (Planning):**

**Innvirkning (Impact):** the number of persons affected by the call.

**Hastegrad (Urgency):** the importance of the call.

**Prioritet (Priority):** how quickly this call should be picked up.

**Måldato (Target Date):** the date and time by which the call should be closed. TOPdesk calculates the Target Date based on priority and duration.

### **5. Behandling (Processing):**

**Operatørgruppe/Operatør (Operator Group/Operator):** the employee or group that will process the call.

**Leverandør (Supplier):** the party that supplies a product or service required to resolve the call.

**Status:** the call's processing status.

**Fullført/Lukket (Completed/Closed):** the sign that the processing is complete.

On the right are large blocks in which you can enter text.


**Forespørsel (Request):** the caller question. This could be a literal description.

**Handling (Action):** the actions that are (or should be) undertaken to resolve the call, and the conversation between the operator and the caller. Here you will also find e-mails and

attachments sent from TOPdesk that belong to this call.

## 1.4 Creating a First Line call

To register a call, open a new card for a First Line call.

- 1 Click  **Ny førstelinjesak (New First Line call)** in the Quick Launch Bar.
  - 2 Enter all relevant information.
  - 3 The red fields are mandatory.
  - 4 Save the call.
- ➔ The blocks on the left-hand are now collapsed. You can expand these blocks and edit the content by clicking on the arrow on the left.

### Exercise 2

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- Situation: you are behind the service desk today. Gro-Anita Hillestad Vindheim calls you to say that she has a problem with his mobile phone. Create a new call in TOPdesk for this.
- The call will appear in your Tasks. Check the Tasks block on the Start Page to see if there is a call registered to your name.



Regularly click



to stay up to date.

### Exercise 3

---

- Think of two other calls and create them in TOPdesk. Come up with the caller yourself. Under Operator, enter the name of your neighbour's character. Do not close the calls yet.
- Check how many calls are now registered to your name in the Tasks block.

## Change a call



When a call is processed, the status can constantly be updated on the Call card. It is easy to add information to the Action field. This way, employees can instantly read the status of their call in the Self-Service Portal.

Sometimes operators need to register something that they do not want the caller to see. Something on internal procedures or doubts concerning a caller's request, for instance.

You can make the text in the Action field invisible for caller, it will then not be displayed in the Self-Service Portal.

- 1 Enter the text you wish to add in the Action field.
- 2 Tick **Gjør usynlig for innringer (Make invisible to caller)** at the top.
- 3 Save the call.

## Exercise 4

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- Gro-Anita e-mails a solution for her disruption. She wants to buy a new phone and already has a new model in mind. Open the call and add the additional text from Gro-Anita in the Action field. Indicate in a new field that you think his request is quite strange.
- Make sure that he cannot see this entry in the Self-Service Portal.


## Uploading documents

It is possible to add documents to a call that are needed to solve the call. Think of:

- Images (screenshots or maps)
- Word documents (explanation of procedures)
- PDF's (user manuals)

To add an attachment, open the registered call.

- 1 In the new field under Action, click  **Last opp en fil (Upload a file)**.
- 2 Choose the document you want to upload and click **Open**.
- ➔ You will know see the uploaded document in the right-hand column.
- ➔ All documents and emails sent from TOPdesk can be found on the **Vedlegg (Attachments)** tab, and in the conversation history under Action.

 **Tip:** it is also possible to drag a file to the action field. This way, you can add the attachment to the call with the drag-and-drop functionality (from IE10 on).

## Exercise 5

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- Gro-Anita also e-mails a photo of the phone that she wants. Add this attachment to the call.
- Check if you can re-open the image.


### 1.5 Second Line calls

There is a difference between First Line calls and Second Line calls. It depends on the arrangement that have been made in your organization what First Line calls and Second Line calls are. In most cases the first line is the front office (for example the service desk or the facility point) and the second line is a group of specialized operators (for example system management or the technical department).



#### Escalate a call

A First Line call can be carried on as a Second Line call: this is what we call escalating.

- 1 Open a call.

- 2 Click .

- 3 Save the card.

The icon on the tab has changed from  to .


## Exercise 6

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- The previous calls were created as First Line Calls. Now it appears that a call register to your name is too complex to be solved in the first line. That is why you need to escalate one of the calls registered to your name to a specialized operator in the second line.

#### Directly create a Second Line Call

You can also create a new call in the second line in the Quick Launch bar with

- 2  Ny Andrelinjesak (New Second Line call).

## **Exercise 7**

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- Gro-Anita calls you with a problem and you directly know that you cannot solve it yourself. Therefore, directly create a Second Line call and fill in the required information. Assign the call to the correct operator.

# 2 Taking a look at calls

## 2.1 Open existing calls

TOPdesk makes it possible to see calls through different angles. To see calls, you can use the to-do overview, the Task board and the quick finder. These methods are explained in the following paragraphs.

### Tasks

The **Tasks** block displays all current actions, sorted by type: first line and second line calls, reservations, change activities and so forth. In the **Egen (Own)** column, on the left, you can see the tasks assigned to you. The right column contains tasks for **Egen, grupper og ikke tildelt (Own, Groups and Unassigned)**.

### Open calls from Own Tasks


- 1 Click the number behind first line or second line calls on the left (column '**Egen**' '**Own**')  
➔ You will now see a list with calls that are registered to your name.
- 2 To open a call, double-click it.

## Exercise 8

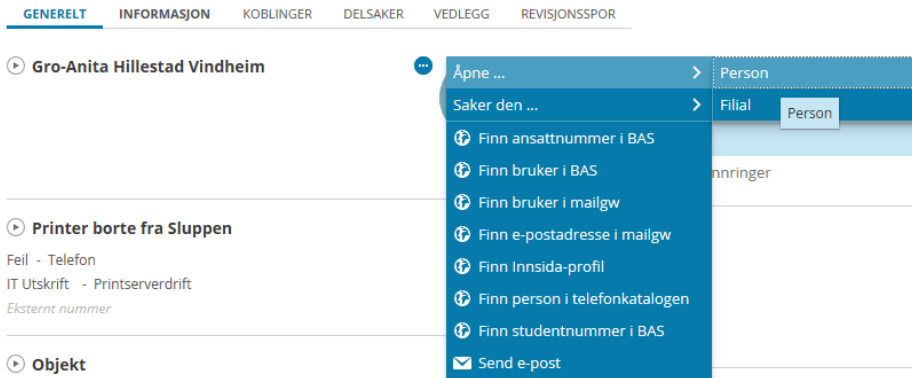
---

- Open a call from the **Tasks** block's **Own** column. Take a look at the various fields.

### Opening other cards

If you click the blue circle with dots  behind a field, a drop-down list comprising several options will appear.

- 1 Click the blue circle behind a field. For example, behind the name of the caller for the person card.
- 2 In the search list, select the **Open ...** option and select the card you wish to view.



## Exercise 9

- Look up the postal address of the caller's branch.



Opened cards are displayed next to each other as tabs


## 2.2 Oppgavetavle (Task Boards)

We have just discussed the **Tasks** block, in which tasks and numbers are sorted per type. The **Oppgavetavle (Task Board)** is another overview that can be opened from the Start Page. It shows all your pending tasks (calls, reservations, change activities etc.) together, sorted for the date on which the tasks need to be completed. This overview is handy to use as a daily task list.

## Exercise 10

- Use the **Task Board** to open the call from exercise 2.

## 2.3 Quick Finder

In TOPdesk you can always search for specific cards of all card types. You can get straight to work with the **Quick Finder** , which is always in the top left of your screen.

- 1 In the **Quick Finder's** search list, select the process you wish to search.

## Taking a look at calls > **Quick Finder**

- 2 Start typing in the empty Quick Finder field. If the term appears in the database, it will be completed automatically.
- 3 Press **Enter**.
- ➔ The **Search Results** overview will open on a new tab.

## Closing Calls

A lot of calls are now registered in TOPdesk. If these tasks have to be solved in practice, they will have to be closed in TOPdesk. How does that work?

### 2.4 Closing a call

When you open a call, it will have the processing status **Current Call**. When you are closing a call, change the status in **Closed**. TOPdesk also has the option **Complete**. This is the step that precedes **Closed**. You can use this processing status to indicate that you have found a solution, but that you will need to discuss this first with the caller. You can also use it when you have solved a call from a colleague and he or she wants to see the Action first before the call is closed. Whether the Completed checkbox is present depends on the settings used in your organization. In this training, you can only use the Completed checkbox for second line incidents.

### Exercise 11

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- You have been assigned a second line call by a colleague. You want to resolve the call and ask your colleague whether the solution suffices. Open a Second line call from your Tasks, add your solutions to the Actions and put the call on Completed.



Don't forget to put the call on the name of your colleague operator so your colleague can view the call in his or her own Tasks.

### 2.5 Adding a call to your Bookmarks

Sometimes you will put the call through to a colleague when you are processing it. After you have put the call through, you cannot find the call back in your overview. If you still want to keep track of the call, you can add it to your Bookmarks.

- 1 Open a current call.
- 2 Click  **Add this card to your bookmarks** top-right in the bar.
- ➔ Your call has now been added to **Bookmarks**, and can be recognized by the  label.
- 3 To view your Bookmarks, click  in the Quick Launch Bar.

## **Exercise 12**

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- You want to put through a complex call from your Tasks to a colleague, but you want to keep track of the updates. Give this call a Bookmark.
- Check if you can see the call in the list of Bookmarks.



# 3 The Tasks and other overviews

The calls that have not been closed are most important to your daily activities. In the block Tasks on the Start Page you will find an overview of all current First and Second line calls. It is important that you regularly refresh this overview to see the latest details.

## 3.1 Processing calls from the Tasks block

The block Tasks has two columns. In these you will see

- 1 How many tasks need to be processed by you: your personal To-do list
- 2 How many tasks need to be processed by (for instance) groups that you are a part of: your group's To-do list

### Exercise 13

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- See which calls, of which you are the operator, are currently open. Open a call and process it.
- Check the tasks block to see if the call is moved from the Groups overview to Own.

## 3.2 Adjusting the Tasks overview

The right column shows calls that have not been registered to your name. These could be calls that have not been assigned to an operator yet. It is convenient that operators can view these calls so that they can assign them. You can customize these columns yourself. You can select one of the following forms:

- Own: all calls of which you are assigned as an operator.
- Groups: all calls that have been assigned to a group that you belong to.
- All: the total of open calls.
- Unassigned: logged calls that have not yet been assigned an operator.

### Adjusting the Tasks columns

- 1 At the top of the **Tasks** block, click .
- 2 Choose which overview you would like to see for column 1 and 2.

- 3 Click Save.
- ➔ You will now see the Tasks of the chosen options.

## Exercise 14

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- Set up column 2 so that it only displays an overview for your Operator Groups.

### Sort the list of Tasks

If you click a number in the Tasks block, you will get a list with current calls. This overview comprises columns with call information. For example, who the operator is and the target date. It differs per employee which information is important to show in Tasks. That is why you can sort the columns and adjust the content. A sorted overview enables an easier search for calls and prioritizes your activities.

- 1 Open the list of **Tasks** by clicking a number in the **Own** column.
- 2 Click the head of the column that you wish to sort.
- ➔ The arrow in the column indicates whether it is sorted in ascending or descending order.



## Exercise 15

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- Sort the list of current calls by the **Måldato (Target Date)** column.

### 3.3 Adjusting the operator settings

You can improve your overviews by adjusting your personal user settings. These settings can be found in the top right corner. Calls that were processed too late can be shown in red.

- 1 In the top right corner, click  and select  **Mine innstillinger (My Settings)**.
- 2 Select your preferred options in the **Oversikter: Visningsalternativer (Overviews)** block.
- 3 Save your settings.

## Exercise 16

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- Adjust your operator settings to make sure that the calls that were created today will be shown in bold.
- Check if there are calls in your Tasks that are shown bold.

## 3.4 Using Operator Groups

It is often easy to assign the calls to more than one operator. It may occur that the operator is away and the calls will not be processed. You can assign calls to an Operator Group. All operators in that group are responsible for processing these calls.

### Exercise 17

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- You have been assigned a second line incident. However, you do not have time to look at it now because you have an important meeting. Assign this call to the operator group so one of your colleagues can process the call. Choose an operator group that you belong to. In the Action field, make a note of what you have already done and why you are reassigning this call to your Operator Group.
- In the Tasks block, check whether the call has appeared in your **Groups** overview.



If you don't know which operator group your account belongs to, ask the trainer.

### Exercise 18

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- You do have the time to process a simple call. Check if there are other calls assigned to your group that you can process.
- Assign a call from this group to your own name. Check the tasks block to see if the call is moved from the **Groups** overview to **Own**.
- Process the call: fill in the action field and close the call.
- Why is it important to save the call to your name first before you process it?

## 3.5 Adjusting overviews

The default Task block includes only the current calls. This overview can however be adjusted. If you are looking for a call that has been closed, you can re-adjust the filter. With the filter you can determine which calls you see in the overview.


### Adjust the filter

Overview can be adjusted with the help of filters. A filter will limit the overviews, which enables an easy search. Once a filter has been added it will stay active, even after logging out.

- 1 Open an overview of first line calls in the Task block by clicking the number following First Line calls.



- 2 On the top right, click and select **Filter**.
- 3 Choose the preferred option in the pop/up.

 The filter is retained after logging out. Please note: Operators sometimes forget about the filter, causing them believe that calls are missing.


## Exercise 19

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- You might want to know which current first line calls have been created over the past 2 days. Adjust a filter so you can see these calls in the overview.
- Tip: adjust the operator and set the filter for a period of time.
- How can you see if a filter has been switched on?

### Total overviews

In the default Task list only the current calls are shown. You have seen that you can also view calls with the process status closed or completed with the filter. However, you cannot see an overview of all calls. You can find this overview on the Module page of Call Management.

- 1 Click the TOPdesk menu in the upper-left corner  and go to **Modules**.
- 2 Under Navigator, select the **Håndtering av saker (Call Management)** module page.
- 3 In the **Oversikt (Overview)** block, click **Alle (All)**.
- 4 Set up the filter fields and click **OK**.


## Exercise 20

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- You now want to see your own closed calls.
- Of how many closed calls were you the operator?
- Tip: filter for Processing status and on operator.

### Editing columns in an overview

You can adjust the information that is shown in the overviews. Each field that you can find in a call can also be added as a column to an overview. You can also hide the columns with irrelevant information to make your overview more readable. You can adjust the overview by pressing the button in the right-hand corner of the overview.

- 1 Open the list of first line calls assigned to your and use the filter to select **All** calls.
- 2 Adjust column visibility by clicking  **Setting up overview**.
- ➔ A pop-up will appear. Use the horizontal arrows to move fields from the Visible to the Not Visible block (and vice versa). Use the vertical arrows to determine the order of the overview.
- 3 In the left column, select the field that you wish to display in the list as a column. Move it to the Visible block with the right arrow.
- 4 Sort the overview for the added column.

## Exercise 21

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- You are curious which of your colleagues process the most calls. Edit and sort your overview to see which operator has processed the most calls.

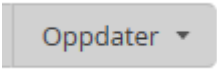
# 4 Manually processing calls

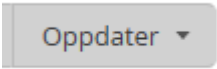
## 4.1 Caller Card

At times it can be easy to directly see which other calls were made by an operator. It could be that he has made an addition to a previous call. TOPdesk's **Caller Card** is ideal for such situations. This is a type of intermediate step towards a call on which you can immediately see the history of a caller. You can add information under **Notes**. After that, you can see whether you want to add this information to a current call or if you want to make a new call with it.

### Adding text to a current call

- 1 On the Quick Launch Bar, click  **Innringerkort (Caller Card)**.
- 2 Fill in the name of the caller.
- ➔ At the bottom you can now see which other calls were made by this caller.
- 3 Add extra call information under **Notater (Notes)**.



- 4 On the top right, click  and select **Valgt sak (Add to selected call)**.
- ➔ All data on the Caller Card is copied to the current call. The text in the Notes field on the Caller Card is added as a Request to the right column.
- 5 Save the call.


## Exercise 22

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- Gro-Anita calls about the status of her mobile phone. She mentions that she also wants to receive a phone cover with her order.
- Add this information to her current call by making use of the Caller Card.

### Making a new call from Caller Card

When you open a filled out Caller Card and you want to make a new call from this caller:



- 1 On the top right, click **Opprett** and select **Førstelinjesak fra større sak (First Line call)**.
  - ➔ All data on the Caller Card is copied to the new call. The name of the caller can be found in the top left corner. The text in the Notes field on the Caller Card is added as a Request to the upper-right block.
- 2 Save the Call card.



## 4.2 Quickly logging a call

There are number of useful options for filling and reading calls. Frequently used options include default texts, adjusting memo fields and copying calls.


### Default texts


If you work with TOPdesk on a daily basis, you will notice that you use the same text time and again. For example: 'I have called the customer, but no one is answering the phone. Try again tomorrow.' It is possible to add default texts for these re-occurring texts.

To insert a default text:

- 1 Click  **Legg til standardtekst (Add default text)** in the Action field.  
→ You will now see nine blocks with the available default texts.
- 2 Click  **Sett inn standardtekst (Insert default text)** to add the text or adjust existing text.
- 3 Enter the text as default text and click **Lagre (Save)**.

To use default texts:

- 1 Click  **Legg til standardtekst (Add default text)** to view the available default texts.
- 2 Enter the text you wish to add in the Action field. This will be added when you click it.

 When you press Shift F12 in the Action Field, you will open the block with available default texts.

### Exercise 23

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- Consider which text you will use often in calls. Add this as a default text. Create a new call and add your default text to the Action Field.

### Copying calls

If you would like to copy specific information from a current call to a new call, you can log a new call from a current call.

- 1 Open the call that you wish to copy from Tasks.





- 2 Click **Opprett** and choose **Sak (Call)**.
- 3 Choose which information you wish to copy to the new call in the pop-up.
- ➔ When you click **Sak (Call)**, a tab will open with the new call in which this information has been copied.

## Exercise 24

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- You receive a call that you have already received from another caller. Copy the old call. Make a First Line call for a different operator.

# Knowledge Base

## 4.3 Knowledge items

The Knowledge Base provides information for filling in and processing calls, among other things. The Knowledge base can be used for several different purposes:

- As an encyclopedia with information for operators.
- As FAQ (frequently asked questions) for callers in the Self-Service Portal.
- For news items on the start page for both the operators and Self-Service Portal.
- As Best Practice Knowledge Management: integrated with Call Management. This way knowledge can be published pro-actively in the Self-Service Portal.

In the Knowledge Base module you will see an overview of items. These are the Knowledge Items. The Knowledge Base uses a tree structure. Clicking a Knowledge Item reveals the linked articles.

### Adding a Knowledge Item to a Call

The Knowledge Base enables you to take over information in the. You can consult the Knowledge Base and check if any relevant information is available.


You can also use search terms in the Self-Service Portal to find (information in) Knowledge Items.

- 1 Create a new call.
- 2 On the bottom right, you can search the Knowledge Base



- 3 In the pop-up you can use search terms to choose the Knowledge Item you want to use.



- 4 Select the Knowledge Item and click .
- 5 Then choose which information from the Knowledge Item you want to put in the call and click **Bruk (Apply)**.

➔ The Knowledge Base information is copied to your call's **Action** and **Request** fields. You can change this manually if you wish.

Find your nearest printer Copies to the Brief Description Include

K00062 Changed on: July 11, 2019 3:40 PM

---

Description Copies to the Request Field Include

Where are the nearest printer?

---

Content Copies to the Action Field Include


Your nearest printer can be found via [MazeMap](#). Find the building you are in and search for "Åpen tilgjengelig skriver" and you will see which printers are located nearby.

---

Comments for Operators

Sist revidert 04.04.2019 av

[Edit in explorer](#) Apply

 You can also add an appendix from the Knowledge Base to a call.

## Exercise 25

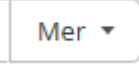
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- Gro-Anita calls with a question about an organizational procedure. You do not know by heart what the procedures are, but you do know that the Knowledge Base has this information available. Solve the call with help of the Knowledge Base.


### Creating Knowledge Items

You can also create and manage knowledge items in the Knowledge Base. The most organized way to do this is via the **Explorer** in the Knowledge base module. This will show the structure of the Knowledge Base: the main items are on the left. If applicable, you can also expand these main items and show the sub items. You can add as many layers as you want.

- 1 Use  to open the **Startside i kunnskapsbase (Knowledge Base start page)** in the Quick Launch bar.


- 2 On the top right, click  and choose **Rediger i utforsker (Edit in the explorer)**.


- 3 Click the place in the tree structure where you want to add a Knowledge Item.

- 4 Now click  and choose **Kunnskapsartikkel (Knowledge Item)**.

- 5 In the **Beskrivelse (Description)** field, describe the knowledge item's topic and provide further information in **(Innhold) Content** field.

- 6 Save the knowledge item.

 If you add this Knowledge Item to a call, the text from the **Description** will appear in the **Request field**, while the text from **Comments** appears in the **Action field**.

 In Knowledge Items you can also show the text as bold, italic or underlined. You can also add images and links in the text. This way, you can make a manual even cleared, for example.


## **Exercise 26**

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- Employees will come to you on a regular base with a request that they can solve themselves in several steps. Consequently, you keep typing the same text over and over in a call. Think of a useful Knowledge Item and create it in the Knowledge Base.
- Make sure that employees in the Self-Service Portal can also access this knowledge item.

## Moving a knowledge item

1 Open the **Utforsker for kunnskapsbase (Knowledge base explorer)**.

2 Click the knowledge item you have created and then click  up top and choose **Klipp ut (Cut)**.

3 Select the Knowledge item to which you wish to attach the cut Knowledge Item.

4 In the top right corner, click  and choose **Lim inn (Paste)**.

➔ Your Knowledge item is now moved to a different position.

## Exercise 27

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- It turns out your Knowledge item is not in the correct location in the tree structure.
- Move your Knowledge Item to a new location.

## 4.4 News items and Self-Service Portal

The Knowledge base enables you to place news items on the TOPdesk homepage. You can inform your colleagues when there is maintenance or let them know that a certain disruption is already known. Because callers and operators can see these messages when they log on, they will see that they do not have to make a call.

### Publishing a News Item

A news item is a knowledge item that you assign the **News** status. You can determine which knowledge item is made available as news item. You can also choose whether the news items are shown in the Self-Service Portal or to operators and for which period of time.

1 Create a new knowledge item in the Knowledge base.

2 Place a tick on the **Nyhetsartikkel (News Item)** field in the **Nyheter** tab to indicate that the knowledge item is a news item.

3 Determine the area (Self-Service Portal or Operator's Section) where the item is visible and for which period.

## Exercise 28

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- There has been a call about a malfunction that a lot of employees will have trouble with. Therefore, you expect a lot of calls about this disruption. To prevent this, you want to place a News Item in which you indicate that the malfunction is known. Think of a large malfunction and create an accompanying News Item that your colleagues are able to see. Make sure that the news item is visible for operators and for employees in the Self-Service Portal.
- Is your new item on the Start Page?

### Viewing knowledge items from the Self-Service Portal

You can easily view knowledge items from the Self-Service Portal. This way, the caller can directly search available knowledge in the Self-Service Portal.



- 1 You can log in in the Self-Service Portal. Use the login name and password provided.
- 2 Click the Knowledge base button. This opens an overview like the knowledge base explorer in the Operator's Section.
- 3 The knowledge items can be opened in a tree structure.
- 4 A second option is to go to the search bar at the top directly after logging in.
- 5 Here, you can fill in search terms, like the title of a knowledge item.

# 5 Selections

A selection is an overview of calls that meet specific criteria. This lets you look up all calls that have been assigned to your colleague or have a specific status, for instance. You can make selections on all fields of the Call card. Selections can be saved.

## 5.1 Creating selections

Creating a simple selection:

- 1 Click the TOPdesk menu  and go to **Instrumentbord (Dashboard)**.
- 2 Under Navigator, select **Håndtering av saker (Call Management)**.
- 3 Click the **Utvalg (Selections)** block and select the option **Alle filtreringer (All Selections)**.
- 4 In the **Nye filtreringer (New selections)** block on the right, click  **Alle saker (All calls)**
- 5 Clicking **der (where...)** generates an overview of the possible selection criteria.
- 6 As criterion, choose a field that is in the call (for example Operator).
- 7 Click **Bruk (Apply)** to add the criterion to the selection.
- 8 Click the **Bruk utvalg (Use selection)** option to immediately use the selection.

### Exercise 29


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- Gro-Anita, a colleague of yours, has fallen ill. Use a selection to see which of his calls need to be re-assigned. Create a new selection for these calls.
- Tip: choose Operator as selection criterion and choose Gro-Anita as value.



## Create a selection with multiple criteria

It is also possible to create a selection with multiple criteria: this enables a more refined search.

- 1 Create a new selection for  **Sak (Call)**.
- 2 Add a criterion with a specific value.
- 3 Under the **og/eller... (and/or)** text, select and.
- 4 Add other criteria for your selection.
- 5 Select the **Bruk utvalg (Use selection)** option to view the results.

## Exercise 30


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- You only want to view the current calls of your sick colleague as well as the ones that need to be processed today. Create a new selection for these calls.
- Tip: if you only want to see current calls you have to choose the criterion closed and tick **make negative**. For calls with today as target date you choose today in the target date field and clear the field for time.
- Check if the overview only shows Hajo Kootstra's calls that need to be processed today at the very latest.

## 5.2 Save selections

### Creating and saving a variable selection

It is also possible to save selections. This way, you only have to create easy selections to use them often. It is convenient to make the selection variable for this use. This means that you can choose the value every time you use the selection. In the case of the sick colleague you will not immediately get all calls for Hajo Kootstra, but you can choose which operator can see the calls. You can thus choose a different value every time with a variable selection.

- 1 Create a new selection for  **Alle saker (All calls)**.
  - 2 Add criteria again, but use the value **Spør under bruk av filtrering (Ask during selection use)**.
  - 3 Select the **Lagre som (Save as)** option.
  - 4 Name the selection and add the availability for the other operators.
  - 5 Select **Lagre (Save)** and then **Bruk utvalg (Use selection)**.
- ➔ When you use this selection later, you will see a pop-up prompting you to select the value of your criteria.

## Exercise 31

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- The selection from the previous assignment proves very useful: there are more sick colleagues of whom you need to take over work. Recreate the selection from the previous exercise, but make the operator variable by with the **Spør under bruk av filtrering (Ask during selection use)** option.

# 6



## Adjusting TOPdesk to meet your needs

The more often you use TOPdesk, the nicer it is to have the much-used buttons close to hand. It is easy to use the Quick Launch bar and to set-up your Start Page in a way that you can directly open much-used selections, reports and links. This enables you to work even more efficiently.

### 6.1 Adjusting the start page

There are probably a couple of selections, reports and links that you want to use often and that you want to open with a single click. You can add and adjust these in the **Filtreringer, rapporter og snarveier (Selections, Reports and Shortcuts)** block.

Adding a selection to your start page:

- 1 In the **Filtreringer, rapporter og snarveier (Selections, Reports and Shortcuts)** block, click  to edit the content.
- 2 Under the **TOPdesk-knapper (TOPdesk buttons)** in **Modul (Modules)**, select **Håndtering av saker (Call Management)**.
  - ➔ If you use additional modules in TOPdesk, you can add related selections and shortcuts to your start page.
- 3 Click a selection and use  to move it to the **Vis (Display)** block.
- 4 Save the setting.


### Exercise 32


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- Display an existing selection in the Selections, Reports and Shortcuts block.
- Check if the selection has indeed appeared on the Start Page.

### Placing a shortcut on your start page




Perhaps you also regularly consult a number of internet pages at work: your supplier's website or a forum with solutions to specific problems, for instance. You can also add shortcuts to these websites to the start page.


- 1 In the **Filtreringer, rapporter og snarveier (Selections, Reports and Shortcuts)** block, click  to edit the content .

- 2 Choose under **Snarveier (Shortcuts)** for  to add a new shortcut .
- 3 Provide the URL and the title of your shortcut.
- 4 Use the **Åpne i TOPdesk (Open within TOPdesk)** option to determine whether or not you want to open the link on a new screen and click **Lagre (Save)**.

## 6.2 Adjusting the Quick Launch Bar

The Quick Launch bar includes all the buttons for creating new cards for actions within TOPdesk: new first line call, Caller Card, Change Request, Reservation. You can choose the position of the buttons as well as which ones are shown. The Quick Launch bar gives you the same options for adding selections, reports or links.

- 1 At the bottom of the **Quick Launch bar**, click  **Rediger (Change)** to adjust the buttons.
- 2 You can remove buttons from your Quick Launch bar by moving them with  from the Display block.
- 3 To add a button to your Quick Launch bar, drag the desired button  to Display and determine the position with the vertical arrows.

 There is only one icon available for the Selections, Reports and Shortcuts. If you add more selections, these can be difficult to tell them apart from each other. You can use the **Selections, Reports and Shortcuts** block for this.