OCLC
HELP DESK SUPPORT

Online Help Desk and Access:

https://servicedesk.oclc.org/tas/public/index.jsp

For Log in and password details contact Support:

VDX / ZPORTAL / WCRS/ Other OCLC Products Support:
Email: support-au@oclc.org

Amlib Support:
Email: support-amlib@oclc.org

WorldShare
WorldCat Local
CONTENTdm Support:
Email: Support-WMS-ANZ@oclc.org

Telephone:
1300 260 795

<table>
<thead>
<tr>
<th>Document</th>
<th>Version 2 (for TOPdesk Version 4.3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last updated</td>
<td>26 February 2013</td>
</tr>
<tr>
<td>Circulation</td>
<td>ANZ Users</td>
</tr>
<tr>
<td>Status</td>
<td>Published</td>
</tr>
</tbody>
</table>
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**Introduction**

This is a quick start guide to using TOPdesk. It walks you through the basic steps that are required to submit an incident to the OCLC support desk.

TOPdesk allows you to track and monitor the progress of support queries logged by you as well as other staff members at your library. It also provides access to previously logged and closed incidents. TOPdesk provides OCLC with a tool to efficiently manage your support incidents and therefore improve the turnaround time on support issues.

Each staff member logging incidents will need to have their own login and password so OCLC support staff knows who to contact to follow up on an issue.

**Procedures**

To ensure consistency of service the following procedures need to be followed.

**New Incident**

A new incident is any problem/question that has not been previously reported. This can be a question, clarification of functionality, or a bug.

New incidents should have the following information:

- **Description** – The details of the problem experienced, including any error messages and steps to replicate the problem.

- **Attachment** – If available, an excerpt of the log file or screen shot of the problem can be useful for support. Attachments can be submitted after the incident has been submitted.

Customer Support will then set a priority and verify that all the required information is available to reproduce the problem.

Each incident should only have one issue/problem/question assigned to it. If you have five issues, each issue should be entered as a separate incident.

**Reoccuring Incident**

Incidents that reappear and require action by the support desk should be reported as a new incident for each occurrence. For example, records locking up the LASER driver in VDX should be reported each time.
**Update/add note to existing incident**
Customers can add to an existing incident by adding a note or attaching additional documents/logs.

**Closing an incident**
Customers can close incidents by adding a note to the call, e.g. saying “Please close call”. Once an incident is resolved, please update the call with a note advising that the call can be closed.

OCLC reserves the right to close without notification from the customer.

**Enhancements**
Contact your product support desk for product specific enhancement procedures.
Accessing TOPdesk/Logging In

In order to use TOPdesk, you will need a username and password; these can be obtained by emailing your support desk.

TOPdesk is accessed by going to

https://servicedesk.oclc.org/tas/public/index.jsp

You will be presented with the Welcome Screen.

Log in using the username and password supplied by your support desk:

Logging in allows you access to view and log incidents.

When you log in for the first time, it is a good idea for you to change your password (see the section on User Settings).
When you log in, you will be presented with the following welcome screen:

![Welcome Screen](image)

In the top, left hand corner are the main navigation links:
You can also use the quick link buttons in the middle of the screen to create a New Incident and view your Current Incidents:

![New Incident and Current Incidents buttons]

In the top, right-hand corner, you can see information about your login and the Log Out link. You can also access the Incidents section to get an overview of all incidents and the user Settings area.

Your most recent Incidents will appear on the right hand side of the screen.

![Last logged Incidents]

Last logged Incidents

» Please send updated stocktake manual (112071252)
Entering a New Incident

To create a new Incident, use either ‘New incident’ from the Shortcuts menu on the left hand side of the screen or the quick link button in the middle of the screen:

This will take you to a screen where you can enter in your new Incident details:

In this screen, you can enter:

- A telephone number different from the one already in your library/login details, if you require us to call you on another number.
- Specify **incident type** of the call (i.e. Fault, Support question, General Request, etc.) by selecting a type from the drop down list:

<table>
<thead>
<tr>
<th>CALL TYPE</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fault</strong> (default)</td>
<td>Use this to log bugs or problems with the application.</td>
</tr>
<tr>
<td><strong>General Request</strong></td>
<td>Can be used if your incident does not fit into any of the other call types.</td>
</tr>
<tr>
<td><strong>Enhancement Request</strong></td>
<td>Used for entering Enhancement requests. Contact your support desk for Enhancement logging procedures.</td>
</tr>
<tr>
<td><strong>Profiles/Changes</strong></td>
<td>Used by OCLC managed services customers.</td>
</tr>
<tr>
<td><strong>Support Question</strong></td>
<td>Used for queries about the application.</td>
</tr>
<tr>
<td><strong>Trials</strong></td>
<td>Used to report incidents with OCLC products during a trial period. (Currently not used for Australian and New Zealand support).</td>
</tr>
<tr>
<td><strong>Request for Quote</strong></td>
<td>Used to request quote for additional module, products licences.</td>
</tr>
<tr>
<td><strong>Request for Training</strong></td>
<td>Used to request training in specific modules or products.</td>
</tr>
<tr>
<td><strong>Request for Implementation</strong></td>
<td>Used to request assistance implementing specific modules or products.</td>
</tr>
</tbody>
</table>
Enter the details of your Incident in the **request area** include the following information:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interface/Module and Software Version:</td>
<td>The Interface or Module and Version in which the problem occurred. For example VDX 6.0.1 WebAdmin.</td>
</tr>
<tr>
<td>Screen/Window Name:</td>
<td>The screen or window you were in when the problem occurred (i.e. Advanced Bib Search Screen, Shipped Screen, Rep/Win)</td>
</tr>
<tr>
<td>Impact to services/Urgency:</td>
<td>How the problem is impacting on your services (i.e. users unable to log in)</td>
</tr>
<tr>
<td>Request details:</td>
<td>Details of the problem including any error messages, whether the problem has occurred on your test or production system and replication steps to help us re-create the problem</td>
</tr>
<tr>
<td>Do you need to attach screen shot or document?:</td>
<td>If a supporting screenshot or document is available attach it to the incident to assist with the efficient resolution of the issue.</td>
</tr>
</tbody>
</table>

![Incident details form](image-url)
To submit the Incident, click on the **Register** icon:

To exit this screen & cancel the Incident, click on the **Cancel** icon:

- After you have submitted your Incident, you will see a confirmation message:

```
Message

The Incident has been saved under number I12071254
Click [here](#) to go back.
```

- An automatic email will also be sent to you after you have registered your Incident, and any further changes made to your Incident will be followed by an email sent to you through TOPdesk, via Customer Support.

```
From: support@oclc.org
To: [email masked]
Cc: 
Subject: Registration of incident I12071254; Imaginary Library

Dear Joe Sample,

Your incident has been registered under number I12071254. We will begin processing the incident and we will keep you posted on the progress. If you have any questions, don’t hesitate to contact us.

Yours sincerely,
Service desk
```

If you need to attach a screen shot or document click on:-

Click [here](#) to go back.

This will take you back into your newly submitted Incident, where you can attach a document.
Attaching a Document

In an existing incident, click on the Attach icon:

You will be taken to the screen where you can attach a document to your open Incident (i.e. screenshots of the error, log file):

You can type a Description (e.g., “Screenshots taken last Wednesday, 22\textsuperscript{nd} of June 2011”) and click on \textbf{Browse...} to browse to the file you wish to upload.
After your file is selected and your description typed, you can attach the file to your Incident by clicking on the Upload button:

Warning: Sending a file to the server takes some time, especially for large files.

After you have uploaded the file, the Incident overview screen will display with your new attachment listed down the bottom:

<table>
<thead>
<tr>
<th>Date/time of creation</th>
<th>Name</th>
<th>Contactperson</th>
<th>Description</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 24, 2012 5:14 AM</td>
<td>Sample File Attachment.docx</td>
<td>Joe Sample</td>
<td>90 kB</td>
<td></td>
</tr>
</tbody>
</table>

![Image of file upload interface]
Quick Finder Incidents

The search box ‘Incidents’ enables you to perform an incident number search.

In the ‘Incidents’ area at the left-hand side of the screen, type the incident number in the search box and click on the Search icon:

Please Note: When entering incident number always include an ‘I’ in front of the number without any spacing e.g. I12078265
The full details of the incident will be displayed:

<table>
<thead>
<tr>
<th>Caller</th>
<th>Type of Incident</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>General request</td>
</tr>
<tr>
<td>Name</td>
<td>WebInterface</td>
</tr>
<tr>
<td>Specification</td>
<td>Medium (P3)</td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>Telephone Number</td>
<td></td>
</tr>
</tbody>
</table>

**Description**

**Request:**

**Action:**
24-07-2012 02:00 PM Peter Huyth: Please find attached the updated stocktake guide.
Please let us know if you require any further assistance.

**Planning**

- **Duration:** 2 weeks
- **Target Date:** August 7, 2012 4:00 PM

**Processing**

- **Operator:** Peter Huyth
- **Time Spent:** 0:00
- **Status:** Under investigation
- **Closed:**
- **Closure Date:**
- **Closure Code:**

**Information**

- **Call Date:** July 24, 2012 12:56 PM
- **Total Time:** 0:00

Created: July 24, 2012 12:56 PM | Changed on: July 24, 2012 2:00 PM
Existing Incidents

To view all open Incidents for your library, click on ‘Current Incidents’ from the Shortcut menu on the left hand side of the screen or from the quick link buttons:

The Overview Incidents screen listing all of your open Incidents will be displayed:
To change the order of your requests, you can click on the **Sort** button on top of the page and then choose one or two sort methods from the upcoming menu:

![Sort, Refresh, Print buttons]

*Sorted on Target Date (ascending)*

To refresh the list click on the OK button, or to print a list of your open Incidents click on the Print button.

From the Overview Incidents screen, you can:

**Enlarge Comments Fields**

In order to see the original request and any comments in larger screens, click on the Enlarge icon:

![Enlarge icon]
The selected section will open as a pop up:

![Image of a pop up window]

On this screen, you can make enlarger or decrease the Font Size by clicking the font icons:

![Font size icons]

Use the Close button to close this pop up:

![Close button]

**Please Note:** Ensure you have enable pop ups in your browser for TOPdesk to display comment fields

**Quick Reply to Incident**

To add a note or comment from the Overview Incidents screen, click on the Edit icon:
This will take you to the screen where you can add a comment to the open Incident:

<table>
<thead>
<tr>
<th>112071254</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>24-07-2012 01:19 PM Joe Sample:</td>
</tr>
<tr>
<td>Interface/Module: I2PORTAL</td>
</tr>
<tr>
<td>Screen/Windows Name: Create request</td>
</tr>
<tr>
<td>Impact to service? Urgency: Needed within next week</td>
</tr>
<tr>
<td>Request details: Please change Pick up location “BU Central Library” to “Central Library”</td>
</tr>
<tr>
<td>Do you need to attach screen shot: No</td>
</tr>
<tr>
<td><strong>Action</strong></td>
</tr>
<tr>
<td>24-07-2012 01:59 PM Peter Huynh:</td>
</tr>
<tr>
<td>Will forward requested change to developer for fixing.</td>
</tr>
</tbody>
</table>

**Feedback:**

- Type your comment in the Feedback field, then click on the Save icon to send it to Support:

- To close a call add a note in the Feedback field advising Customer Support that the call can be closed, then click on the Save icon to send it to Support:

If you don’t want to make any changes to the call, exit out of this screen by clicking on the Cancel icon:
**View Incident**

To view an Incident from the Overview Incidents page, click on the Incident number:

![Overview Incidents](image)

This will display your Incident in greater detail (screen one):

![Screen One](image)

In the first part of the screen you can see information about what type of call it is (i.e. Fault, Support Question), how it was made (i.e. Telephone, Webinterface, Email), and the Impact (i.e. Medium, Low, High).
Below this, you can see the Request details, as well as the following comments from both yourself and the Customer Support person looking after your Incident, the expected completion date ‘Target Date’, the current Status (i.e. Await customer response, Await 3rd party response, Under Investigation), and the name of the Customer Support officer who is currently in charge of it.

**Note:** Awaiting customer response indicates that OCLC support staff will take no further action on the incident until further information as requested is received.

At the bottom of the screen, you can see the date the request was registered and any documents attached by you or Customer Support.

You can do four things with the Incident from this screen:

1. Reply to Incident (add a note or comment)
2. Attach a document
3. Print incident details
4. Forwarding incident details

**Reply to Incident**

To add a comment to the Incident, click on the Edit icon:

This will then take you to the screen where you can add a comment:
• Type your comment in the Feedback field, then click on the Save icon to send it to Support:

• To close a call add a note in the Feedback field advising Customer Support that the call can be closed, then click on the Save icon to send it to Support:

If you don’t want to make any changes to the call, exit out of this screen by clicking on the Cancel icon:
Print Incident Details

To display a printable version of your Incident click on the Print icon:

A printer friendly version opens up in a new tab/window and by clicking the print symbol again:

You can select an available printer and start printing.

<table>
<thead>
<tr>
<th>Caller</th>
<th>Type of Incident</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer:</td>
<td></td>
</tr>
<tr>
<td>Imaginary Library</td>
<td></td>
</tr>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Joe Sample</td>
<td></td>
</tr>
<tr>
<td>Specification:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>Springfield</td>
<td></td>
</tr>
<tr>
<td>Telephone Number:</td>
<td>xxxx xxxx xxxx</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request:</td>
<td></td>
</tr>
<tr>
<td>24-07-2012 8:19 PM Joe Sample:</td>
<td></td>
</tr>
<tr>
<td>Interface/Module: 2PORTAL</td>
<td></td>
</tr>
<tr>
<td>Screen/Windows Name: Create request</td>
<td></td>
</tr>
<tr>
<td>Impact to service/ Urgency: Needed within next week</td>
<td></td>
</tr>
<tr>
<td>Request details: Please change pick up location &quot;BU Central Library &quot;Central Library&quot;</td>
<td></td>
</tr>
<tr>
<td>Do you need to attach screen shot: No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planning</th>
<th>Copy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration:</td>
<td></td>
</tr>
<tr>
<td>2 weeks</td>
<td></td>
</tr>
<tr>
<td>Target Date:</td>
<td></td>
</tr>
<tr>
<td>August 7, 2012 4:00 PM</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Date:</td>
<td></td>
</tr>
<tr>
<td>July 24, 2012 1:19 PM</td>
<td></td>
</tr>
<tr>
<td>Total Time:</td>
<td></td>
</tr>
<tr>
<td>0:19</td>
<td></td>
</tr>
</tbody>
</table>
Forwarding Incident Details

To forward particular incident details click on the forward icon:

An email form will open up in a new tab/window:

Edit the email form, and then click on the Send icon to send it to Support.
Closed or Archived Incidents

In order to view closed or archived Incidents, click the Incidents menu at the top, right hand corner of the screen:

This will take you to a screen where you can create a new Incident, or view a list of one of the sets of Incidents:

This screen is divided into three sections:

- **Overview** – All incidents by current logged in user
- **Overview Customer** – All incident logged by the user library
- **New** – To create a new incident
<table>
<thead>
<tr>
<th>INCIDENT</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own</td>
<td>All Incidents from you or your library, including closed, open and completed.</td>
</tr>
<tr>
<td>Own current</td>
<td>Only currently open Incidents from you or your library.</td>
</tr>
<tr>
<td>Own completed</td>
<td>This will show second line incidents that have been “Completed”. Second line incidents are incidents that have been escalated to a second line of support, for example, where specialist or development knowledge may be required. Only second line incidents can be completed.</td>
</tr>
<tr>
<td>Own closed</td>
<td>These are Incidents that have been “Closed”.</td>
</tr>
<tr>
<td>Own archived</td>
<td>Any Incidents from you or your library that may have been archived by Customer Support.</td>
</tr>
</tbody>
</table>

**Please Note:** You can view any closed incidents, but they cannot be edited.
User Settings

To access your User Settings click on the “Settings” link on the top, right hand side of the screen:

You will be presented with the User Settings screen:

![User Settings](image)

After making any changes in this screen, you can save by clicking on the Save icon:

To exit the screen, click on the Cancel icon:

**Note:** OCLC staff cannot see your password, so once you have changed it, only you will know it.
**Change Your Password**

You can change your password in the ‘Change password’ area on the left hand side of the User Settings screen:

```
User Settings

<table>
<thead>
<tr>
<th>Change password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old password</td>
</tr>
<tr>
<td>Password</td>
</tr>
<tr>
<td>Repeat password</td>
</tr>
</tbody>
</table>
```

Simply type your existing password into the “Old password” field, then type your new password into the “Password” field and type it again into the “Repeat password” field. If you cannot remember your existing password, please contact OCLC support desk.

To save your new password, click the Save icon:

**Change Results Displayed Per Page**

The ‘Search results’ area at the right-hand side of the User Settings screen can be used to change the number of Incidents that are displayed at a time in your search results:

```
Search results

Results per page:
100
10
20
30
40
50
100
```

Simply click on the maximum size from the drop down list (largest is 100) and click on the Save icon:
Checking Details

On the top, right-hand of the screen you will see your name, followed by your library’s name displayed within brackets:

Library Details

To access your library’s details, click on your library name between the brackets:

(Imaginary Library)

Please note that the email address listed in this screen is not used to send your Incident updates. The email address for updates is the one located under your Contactperson / Login Details (next heading).
There are two options from this screen:

The Upload icon will allow you to attach documents to your library’s record:

These will then be available for anyone from your library:

<table>
<thead>
<tr>
<th>Date/Time of creation</th>
<th>Name</th>
<th>Contact person</th>
<th>Description</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1, 2011 2:41 AM</td>
<td>Accessing support</td>
<td>Jane Customer</td>
<td>docs.pdf</td>
<td>11 KB</td>
</tr>
<tr>
<td>September 8, 2009 7:24 AM</td>
<td>ChangeDetails.gif</td>
<td>Imaginary Library</td>
<td></td>
<td>16 KB</td>
</tr>
</tbody>
</table>
The Print icon displays a printable version of your library’s contact card:

### Imaginary Library, Springfield

**General**
- Name: Imaginary Library
- Customer: 123
- Street: Smith Street
- City: Springfield
- Postcode: 1234
- Country: AU

**Postal Address**
- Street: Smith Street
- City: Springfield
- Country: AU

**Internet**
- Website: http://ourlibrary.com/
- Email: library@ourlibrary.com

**Customer type**
- type customer: Independent Customer

**Main Contact**
- Contact: Jane Customer
- Telephone: 123
- Fax: 123

**Documents uploaded from Self Service Desk**

<table>
<thead>
<tr>
<th>Date/Time of creation</th>
<th>Name</th>
<th>Description</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1, 2011 2:41 AM</td>
<td>Accessing support docs.pdf</td>
<td>Jane Customer</td>
<td>11 kb</td>
</tr>
<tr>
<td>September 6, 2009 7:26 AM</td>
<td>ChangeDetails.pdf</td>
<td>Imaginary Library</td>
<td>16 kb</td>
</tr>
</tbody>
</table>

**User Details**
To view your login details and contact details, click on your name

Joe Sample

**General**
- Surname: Sample
- First Name(s): Joe

**Contact Details**
- Do not use
- Telephone
- Mobile Number
- Fax Number
- Email: peter.huynh@oclc.org

**Location**
- Customer: Imaginary Library
- Location: Springfield

OCLC (UK) LTD
Company Confidential
ABN 15096353847

Page 32 of 34
It is important to ensure that the email address on this screen is correct, as your automatic email updates are sent to this address. If your email address is incorrect, please contact your support desk to have it amended.

The Upload icon can be used to attach documents or the Print icon used to display a printable version of your contact card.

**Log Out**

To log out of a TOPdesk session, click on the “Log out” link at the top right hand corner of the screen.

The 'Log out” link will end your session and take you back to the Login page.
OCLC
HELP DESK SUPPORT

Online Help Desk and Access:
https://servicedesk.oclc.org/tas/public/index.jsp

For Log in and password details contact Support:

VDX / ZPORTAL / WCRS/ Other OCLC Products
Support:
Email:
support-au@oclc.org

Amlib Support:
Email:
support-amlib@oclc.org

WorldShare
WorldCat Local
CONTENTDM
Support:
Email:
Support-WMS-ANZ@oclc.org

Telephone:
1300 260 795