Product Update Webinar

TOPdesk

Who are we?

- Tom Knippenberg
  Product Manager

- Esther de Winter
  Product Manager

Stefan van Opstal
Product Manager

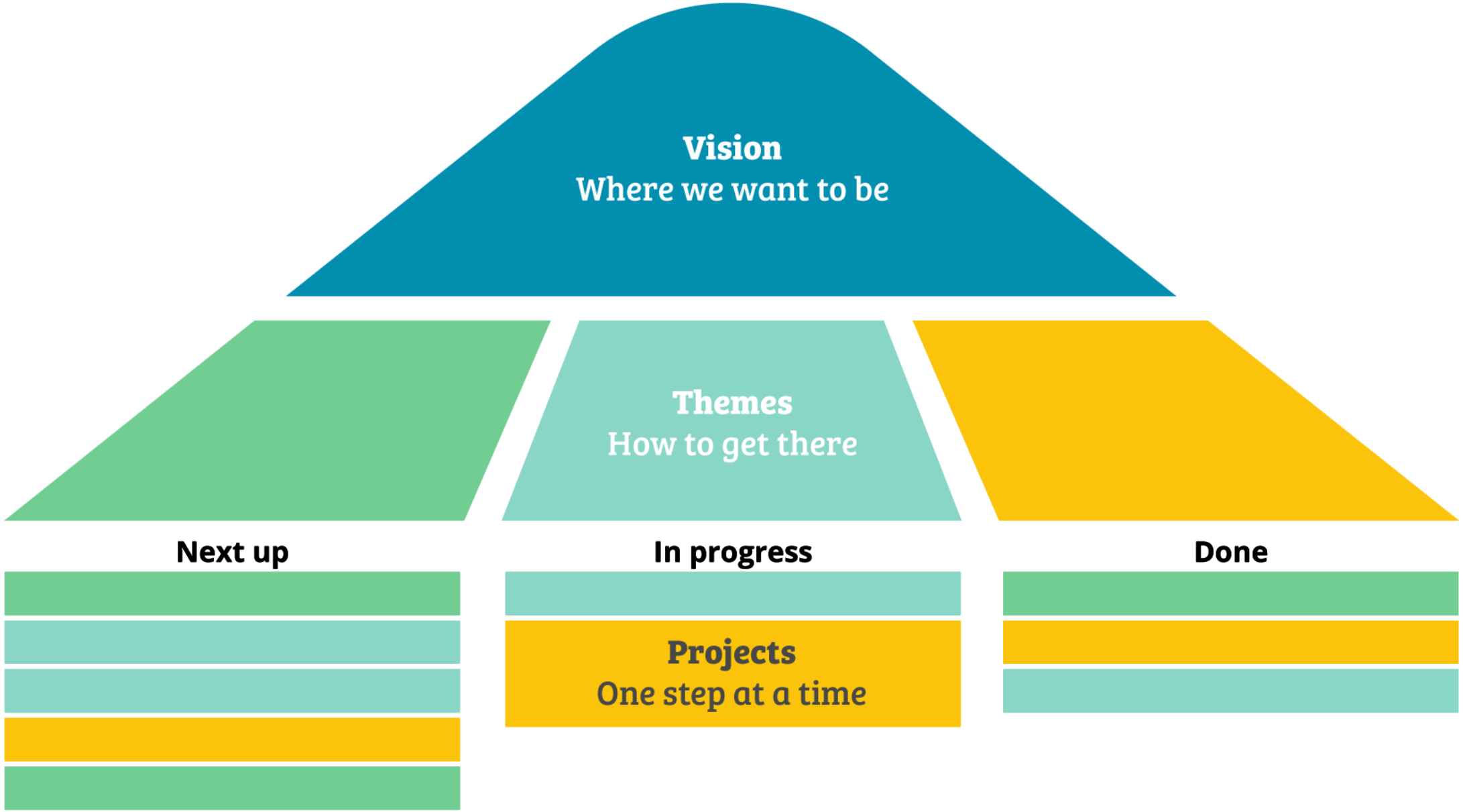
Agenda for today

- TOPdesk's vision
- Demo of new & upcoming features
- Overview: what's next?
- Finding more information

We'll email you an overview tomorrow

TOPdesk's vision; the faster way to Service Excellence

"Guide organizations to achieve service excellence by getting people engaged, empowering them to work better together"


Vision
Where we want to be
Themes
How to get there
Next up
In progress
Done
Projects
One step at a time

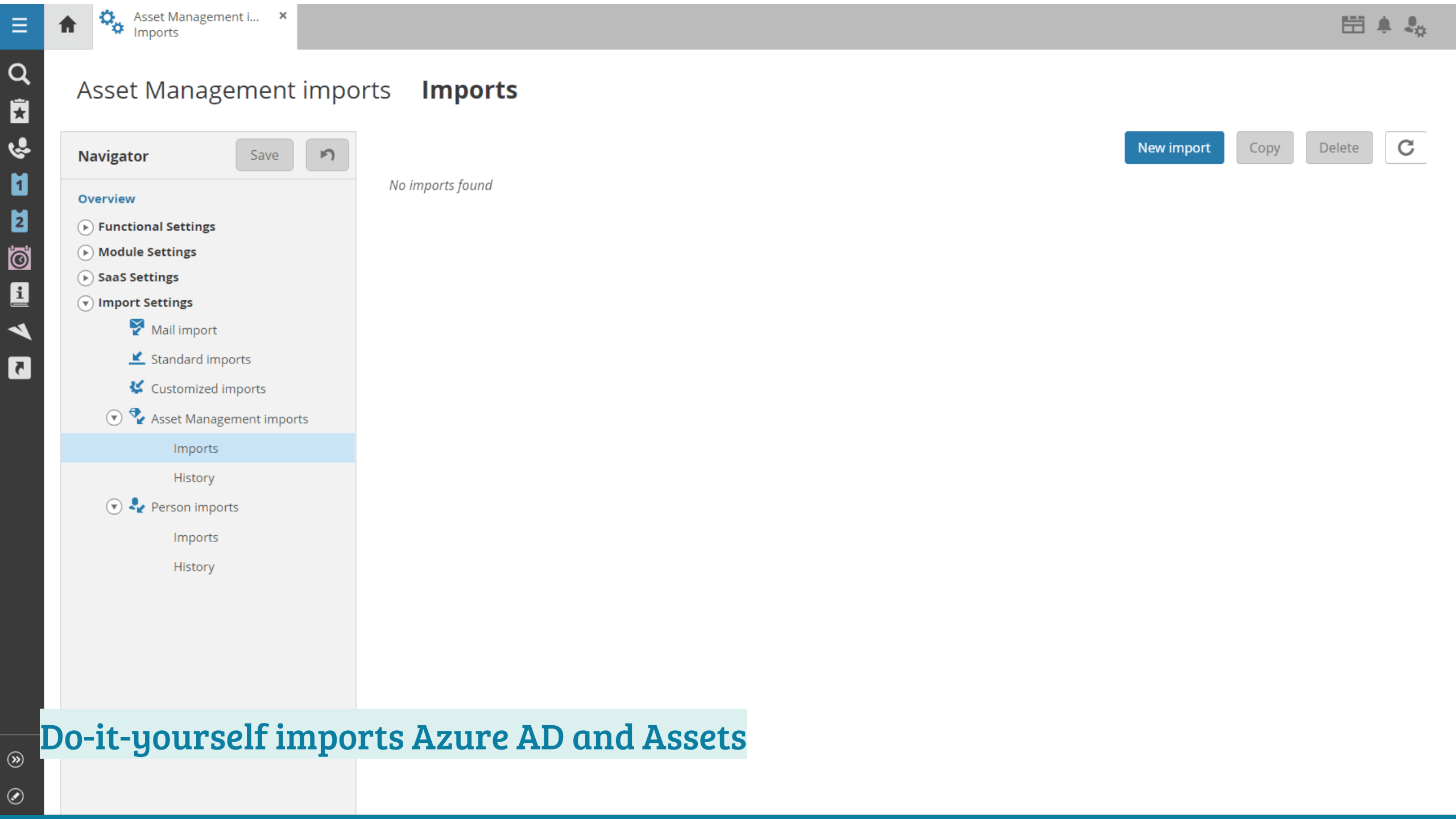
The features we'll demo today:

- Asset Management
- Public knowledge items
- Chat
- Share & Subscribe
- Collaboration platform
- Artificial intelligence
- Workflows
- Mobile

Do-it-yourself imports Azure AD and Assets

What: Customer-facing import wizard for Assets and Azure AD

Why: Improving self-reliance for creating and adjusting imports



Do-it-yourself imports Azure AD and Assets

G11

	A	B	C	D	E
1	name	License Plate	Brand	Purchase date	Purchase price
2	CAR001	SV-HB-66	Alfa Romeo	2-2-2019	€ 40.000
3	CAR002	SV-HB-67	Audi	3-2-2019	€ 80.000
4	CAR003	BE-HA-23	BMW	4-2-2019	€ 60.000
5	CAR004	XY-ZJ-23	Volkswagen	5-2-2019	€ 50.000
6	CAR005	BHV-AJ-3	Alfa Romeo	6-2-2019	€ 40.000
7	CAR006	23-23-AH	Audi	7-2-2019	€ 80.000
8	CAR007	QO-ZJ-49	BMW	8-2-2019	€ 60.000
9	CAR008	SV-HB-66	Volkswagen		€ 50.000
10	CAR009	SV-HB-67	Alfa Romeo		€ 40.000
11	CAR010	BE-HA-23	Renault		€ 34.000
12	CAR011	XY-ZJ-23	BMW		€ 60.000
13	CAR012	BHV-AJ-3	Volkswagen		€ 50.000
14	CAR013	23-23-AH	Alfa Romeo		€ 40.000
15	CAR014	QO-ZJ-49	Peugeot		€ 24.000
16	CAR015	SV-HB-66	BMW		€ 60.000
17	CAR016	SV-HB-67	Volkswagen		€ 50.000
18					
19					
20					
21					

Do-it-yourself imports Azure AD and Assets

Asset import **Auto import manual**

Import summary

1. Target
2. Source
3. Field mapping
4. Import settings
5. Scheduling
6. Preview

2. Source

Select the file you wish to import from (Microsoft Excel or CSV)
Use the 'Download xlsx template' button to obtain a correctly formatted source file.

Download xlsx template

Select a file
or drop one here

Previously uploaded files:

Select file to use

Time zone for dates in Excel (cells formatted as Date only):

(GMT +01:00) Europe/Berlin

Filter on source data (optional)
No filter rules added yet

Add filter rule

Do-it-yourself imports Azure AD and Assets

Give us feedback!

Previous step

Save progress

Next step

Asset import **Auto import manual**

Import summary

1. Target
2. Source
3. Field mapping
4. Import settings
5. Scheduling
6. Preview

3. Field mapping

Fields from source:

Brand

Mapped fields:

License Plate	»	License Plate (kenteken)
name	»	Asset ID (name)*
Purchase date	»	Purchase date (aanschafdatum)
Purchase price	»	Purchase price (aanschafwaarde)

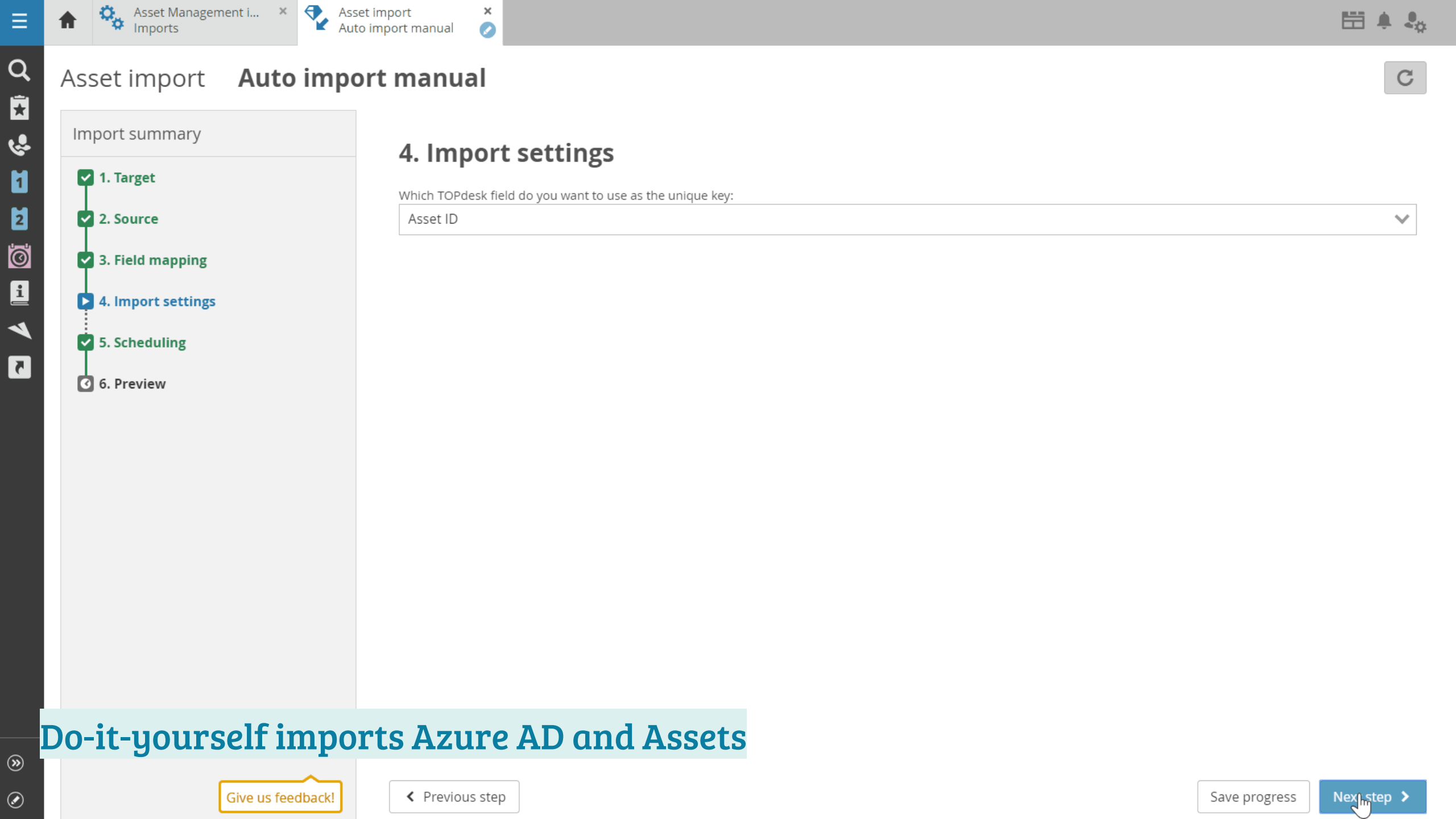
Do-it-yourself imports Azure AD and Assets

Give us feedback!

Previous step

Save progress

Next step


Asset Management i...
Imports
Asset import
Auto import manual
Asset import
Auto import manual
Import summary
1. Target
2. Source
3. Field mapping
4. Import settings
5. Scheduling
6. Preview
4. Import settings
Which TOPdesk field do you want to use as the unique key:
Asset ID
Do-it-yourself imports Azure AD and Assets
Give us feedback!
Previous step
Save progress
Next step

Asset import **Auto import manual**

Import summary

- 1. Target
- 2. Source
- 3. Field mapping
- 4. Import settings
- 5. Scheduling
- 6. Preview

6. Preview

Assets to be created (14)

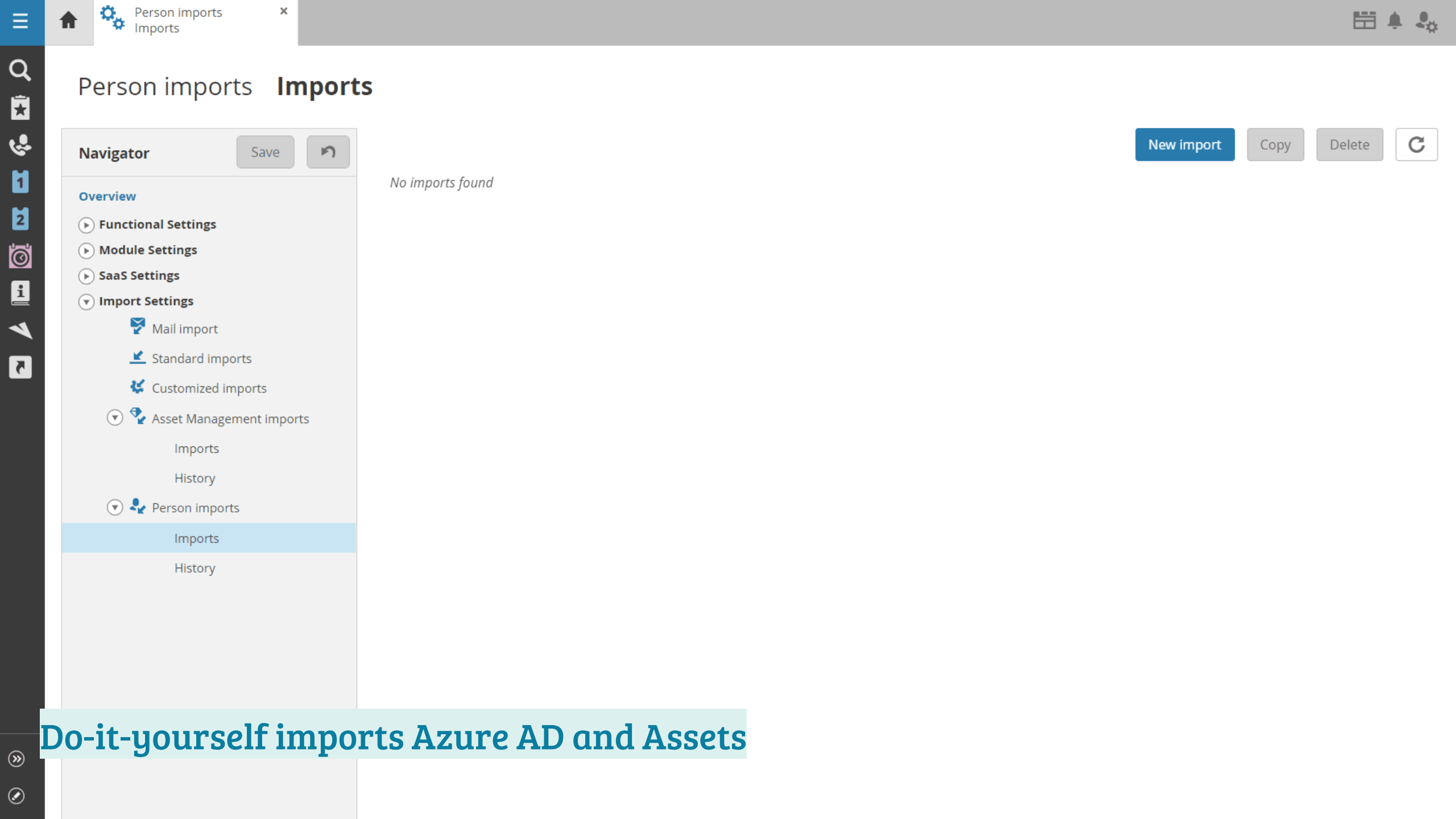
Assets to be updated (0)

Errors (2)

The records below cannot be imported and will be skipped. To import these records, correct the data in your source file.

Asset ID	Source field	Target field	Error
CAR010	Brand	Brand	Unrecognized value: Renault
CAR014	Brand	Brand	Unrecognized value: Peugeot

Do-it-yourself imports Azure AD and Assets



Do-it-yourself imports Azure AD and Assets

Do-it-yourself imports Azure AD and Assets

Version: Available on SaaS, aiming for Q2 on-premises

More information: blog.topdesk.com/updates/importing-made-easy

Coming up

Import from local AD

What: Import persons from local AD in the import wizard

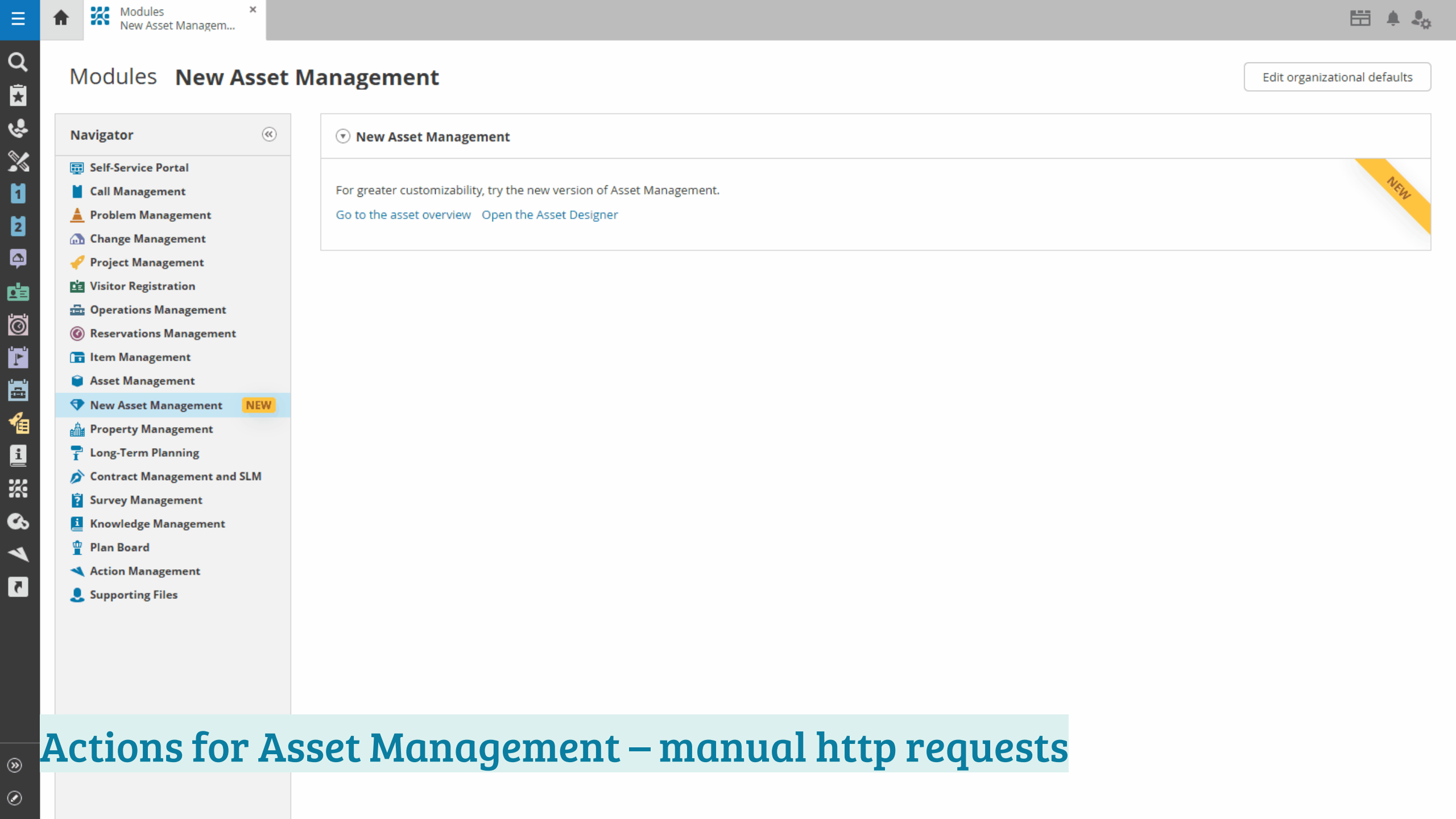
Why: Improving self-reliance

Version: Aiming for Q2 on SaaS, Q3 on-premises

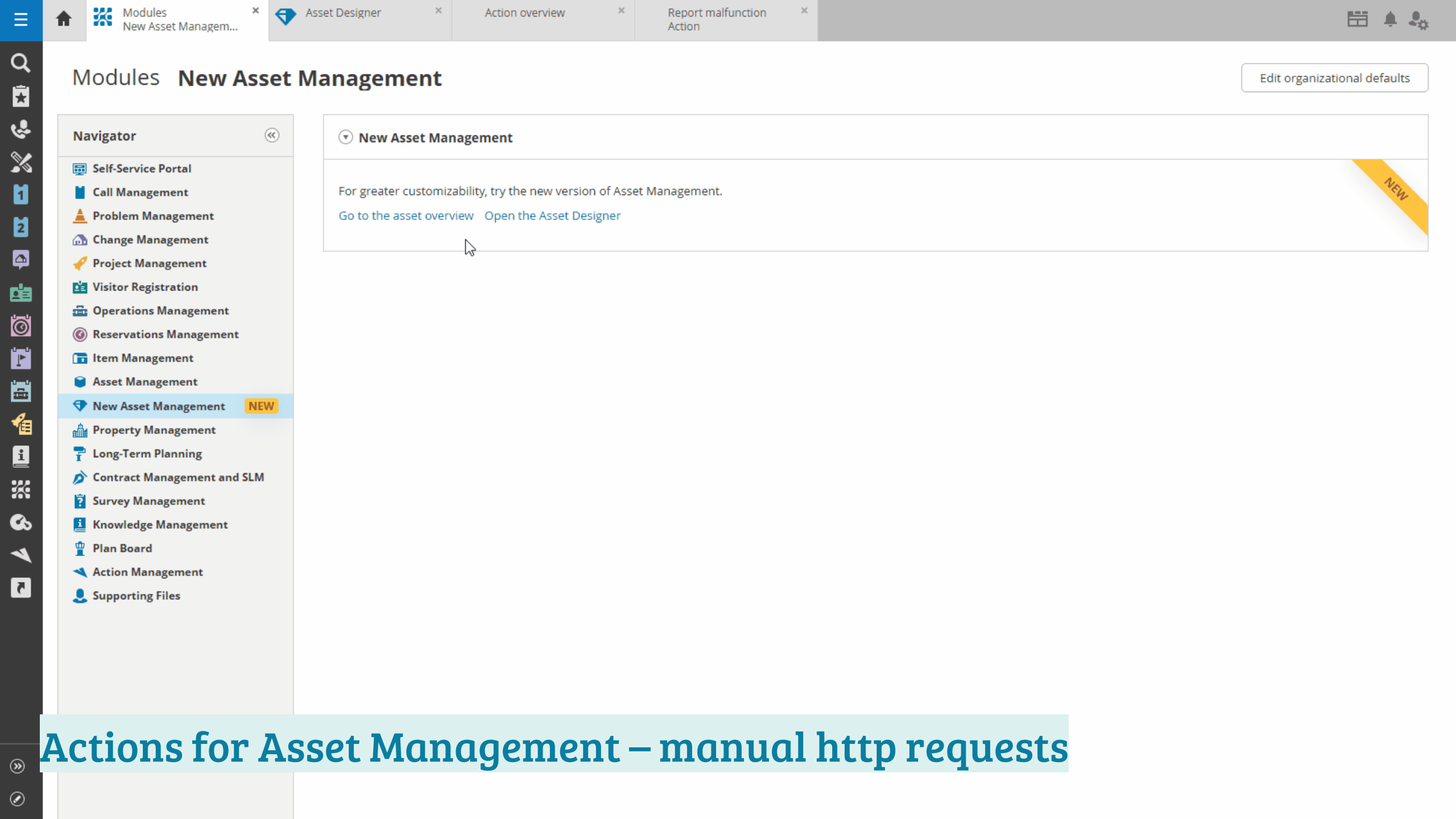
Actions for Asset Management
Manual http requests

What: Manually triggering a series of http requests from an asset card

Why: Allowing to trigger integrations and first step towards emailing



Actions for Asset Management – manual http requests



Actions for Asset Management – manual http requests

Actions for Asset Management
Manual http requests

Version: Available on SaaS, aiming for Q2 on-premises

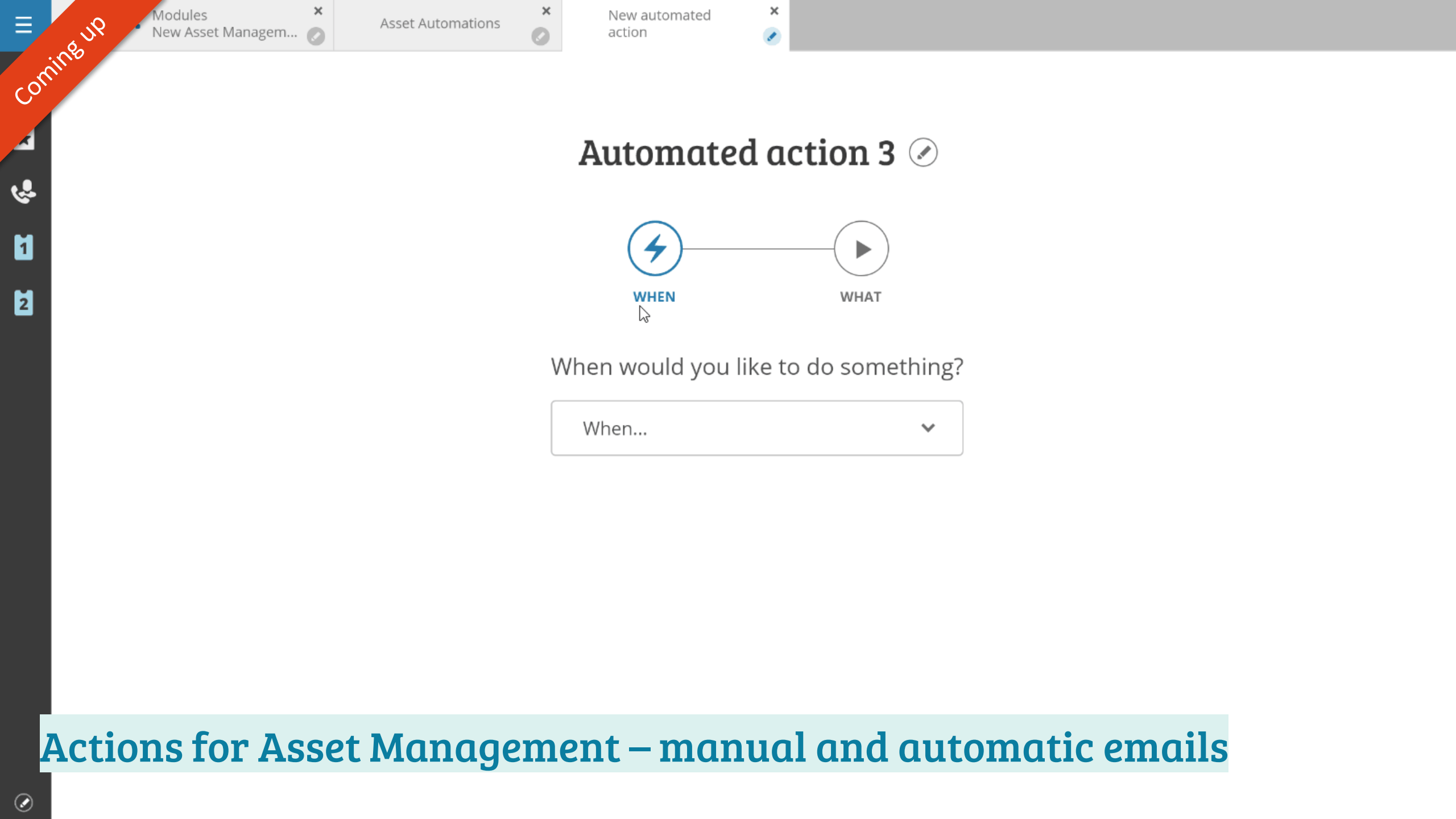
Coming up

Actions for Asset Management
Manual and automatic emails

What: Sending emails from Asset Management, both manually and automatically (e.g. license expires)

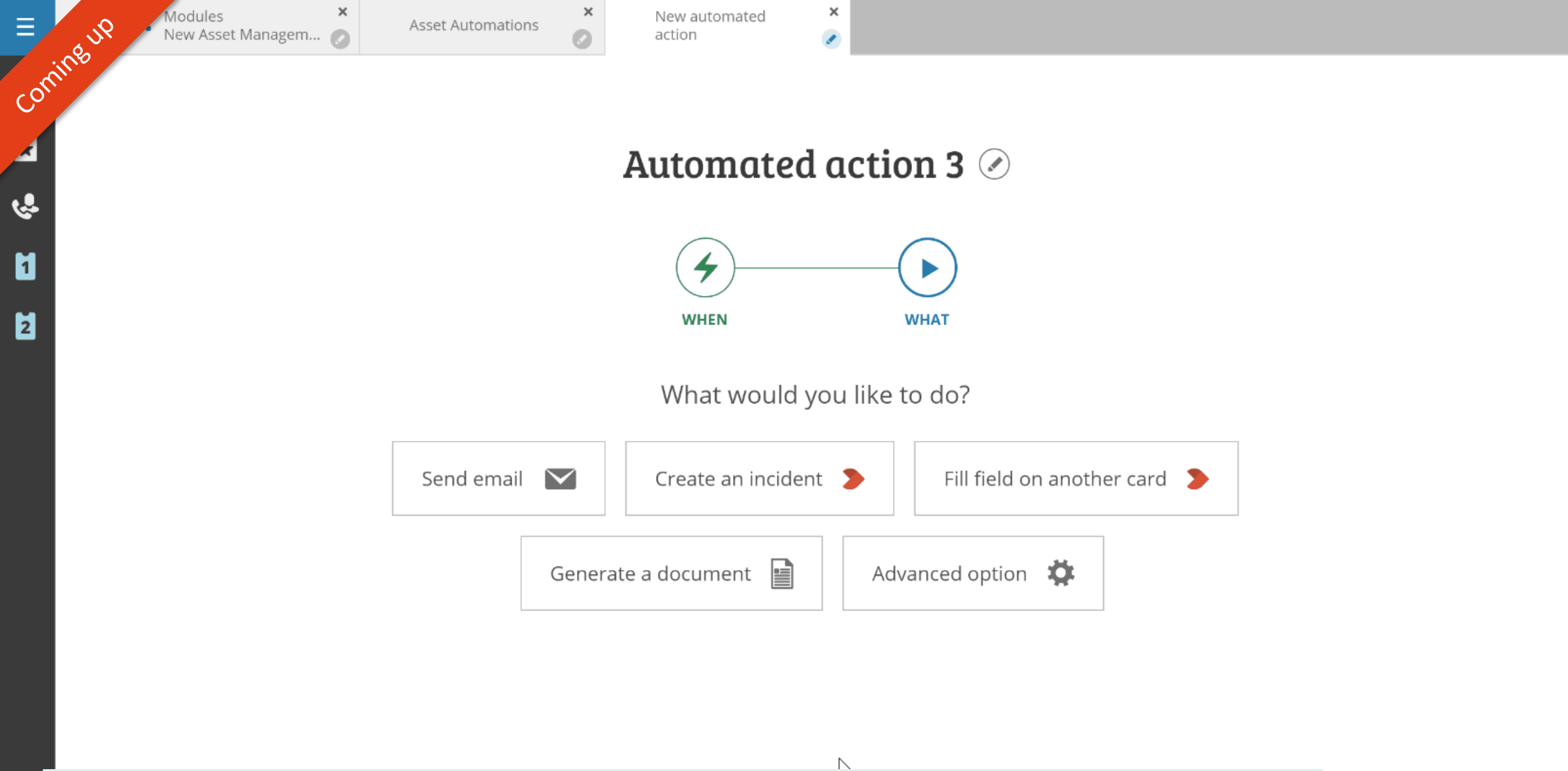
Why: Signalling users when something is up with their assets

Coming up



Actions for Asset Management – manual and automatic emails

Coming up



Actions for Asset Management – manual and automatic emails

Coming up

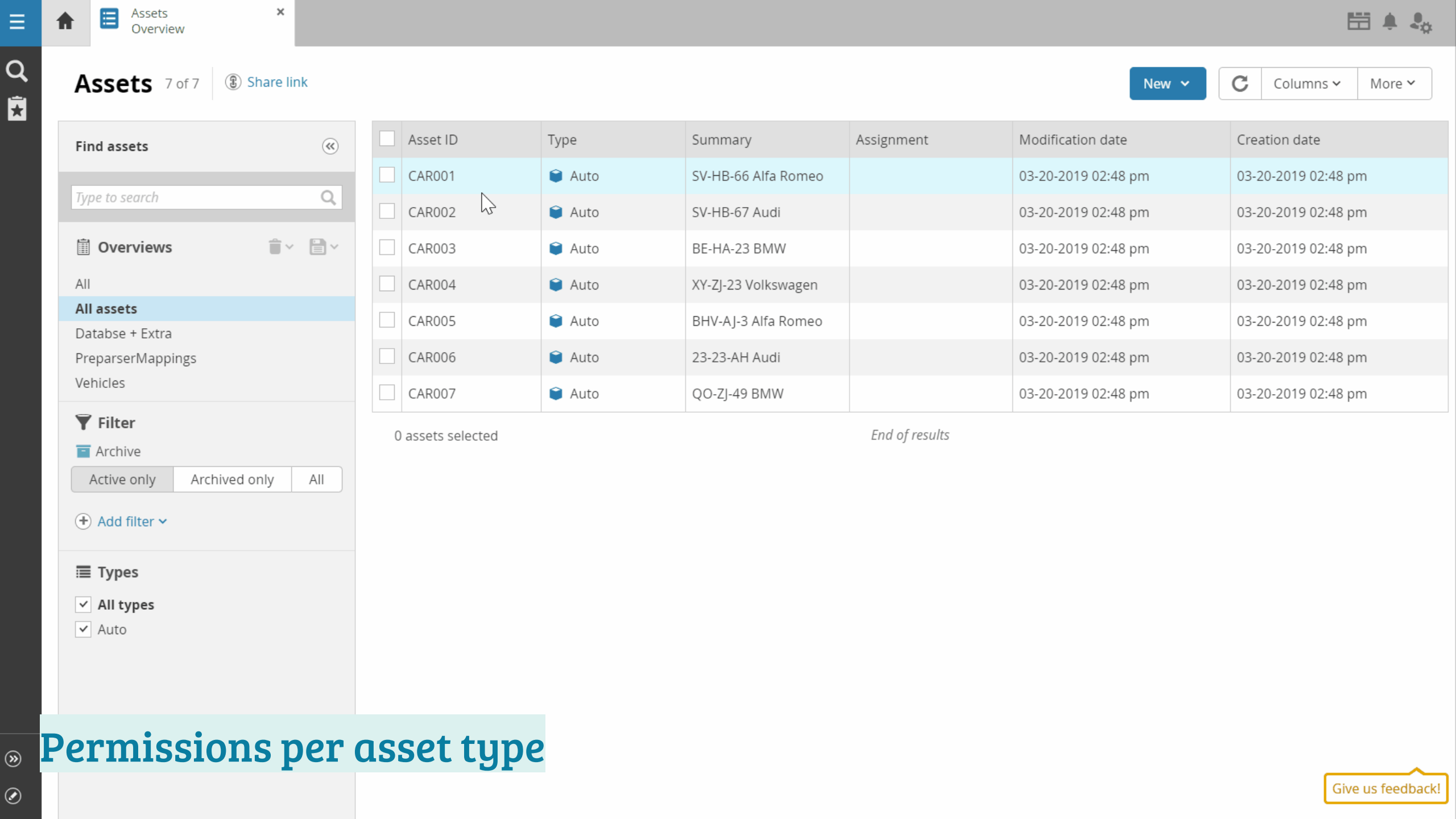
Actions for Asset Management
Manual and automatic emails

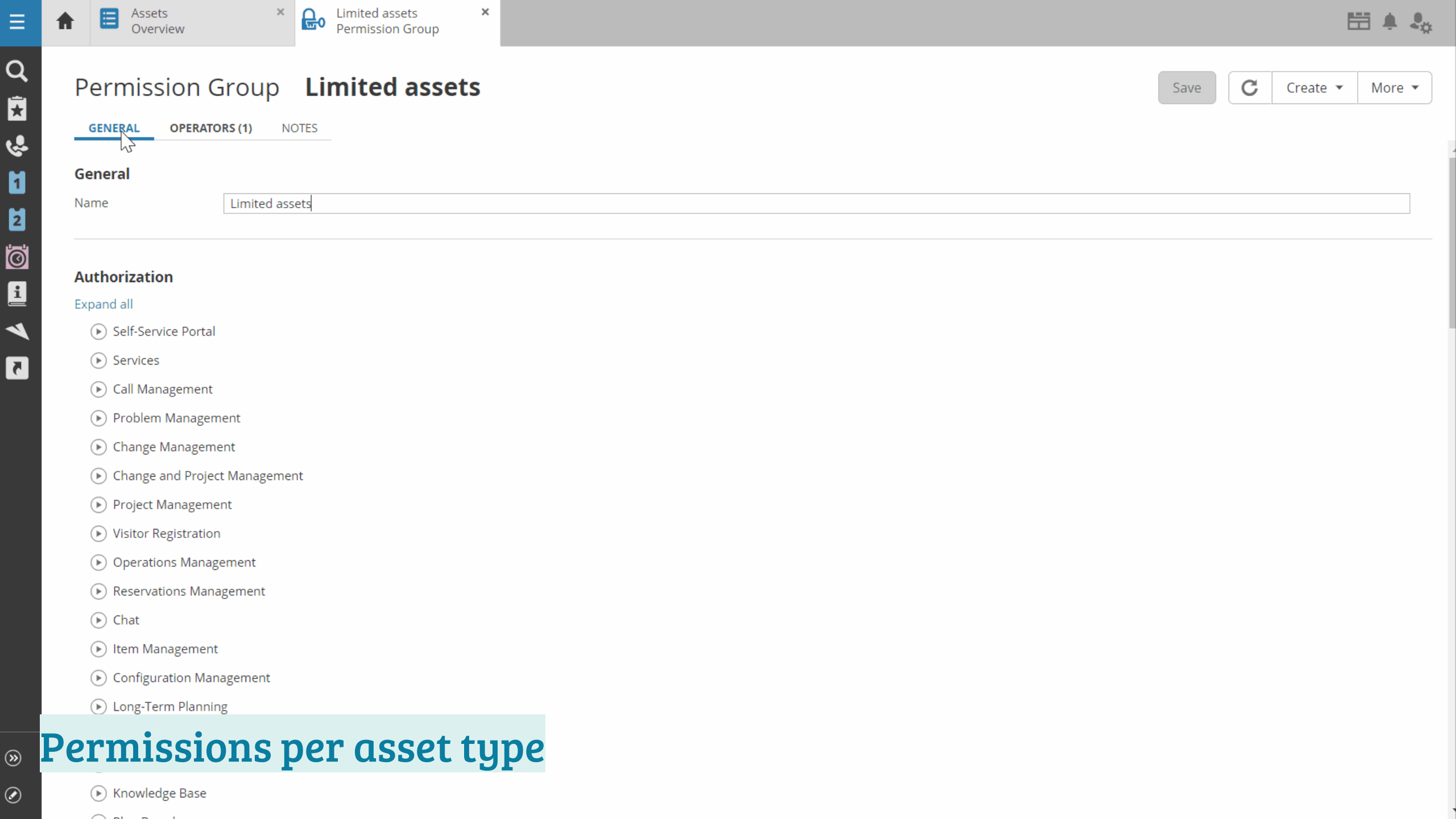
Version: Q2 on SaaS, aiming for Q3 on-premises

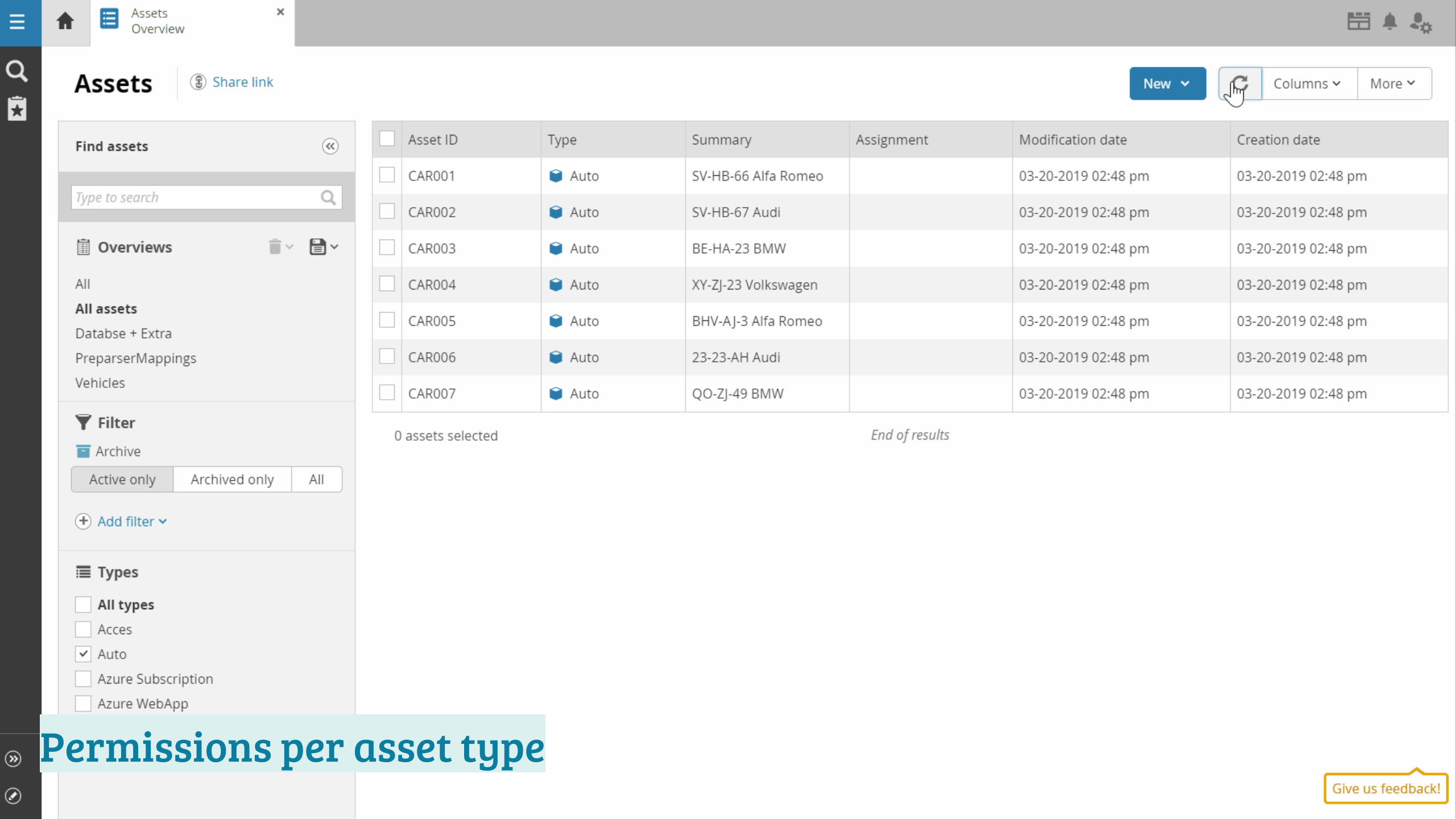
Permissions per asset type

What: Configure read/write permissions for Asset Management on a template level

Why: Different departments or operator groups shouldn’t be able to see each other’s assets


Assets
Overview
Assets 7 of 7
Share link
New
Columns
More
Find assets
Type to search
Overviews
All
All assets
Databse + Extra
PreparserMappings
Vehicles
Filter
Archive
Active only
Archived only
All
Add filter
Types
All types
Auto
Asset ID
Type
Summary
Assignment
Modification date
Creation date
CAR001 Auto SV-HB-66 Alfa Romeo 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR002 Auto SV-HB-67 Audi 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR003 Auto BE-HA-23 BMW 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR004 Auto XY-ZJ-23 Volkswagen 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR005 Auto BHV-AJ-3 Alfa Romeo 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR006 Auto 23-23-AH Audi 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR007 Auto QO-ZJ-49 BMW 03-20-2019 02:48 pm 03-20-2019 02:48 pm
0 assets selected
End of results
Permissions per asset type
Give us feedback!


Assets
Overview
Limited assets
Permission Group
Permission Group Limited assets
Save
Create
More
GENERAL
OPERATORS (1)
NOTES
General
Name
Limited assets
Authorization
Expand all
Self-Service Portal
Services
Call Management
Problem Management
Change Management
Change and Project Management
Project Management
Visitor Registration
Operations Management
Reservations Management
Chat
Item Management
Configuration Management
Long-Term Planning
Permissions per asset type
Knowledge Base


Assets
Overview
Assets
Share link
New
Columns
More
Find assets
Type to search
Overviews
All
All assets
Databse + Extra
PreparserMappings
Vehicles
Filter
Archive
Active only
Archived only
All
Add filter
Types
All types
Acces
Auto
Azure Subscription
Azure WebApp
Asset ID
Type
Summary
Assignment
Modification date
Creation date
CAR001 Auto SV-HB-66 Alfa Romeo 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR002 Auto SV-HB-67 Audi 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR003 Auto BE-HA-23 BMW 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR004 Auto XY-ZJ-23 Volkswagen 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR005 Auto BHV-AJ-3 Alfa Romeo 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR006 Auto 23-23-AH Audi 03-20-2019 02:48 pm 03-20-2019 02:48 pm
CAR007 Auto QO-ZJ-49 BMW 03-20-2019 02:48 pm 03-20-2019 02:48 pm
0 assets selected
End of results
Permissions per asset type
Give us feedback!

Permissions per asset type

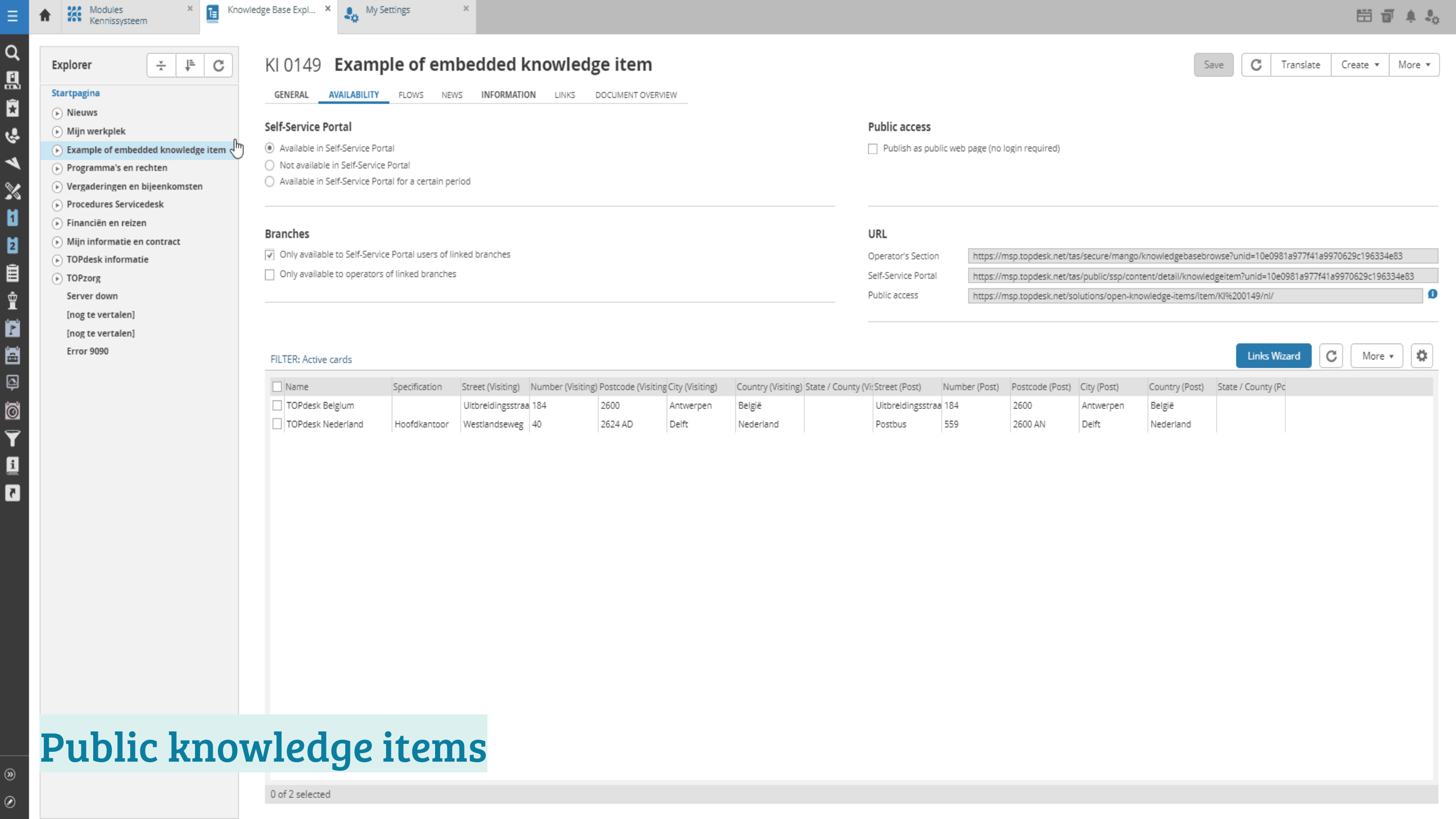
Version: Available on SaaS and part of the Q1 on-premise release

More information: blog.topdesk.com/updates/permissions-per-asset-type

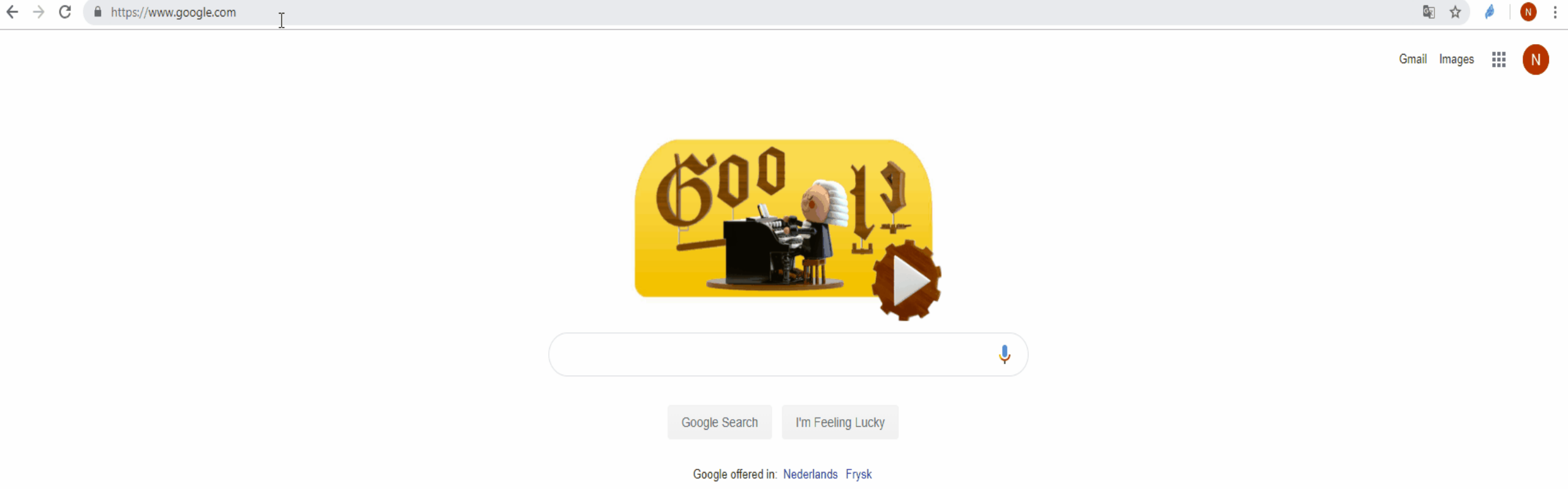
Public knowledge items

What: Knowledge items that you can make available outside of TOPdesk

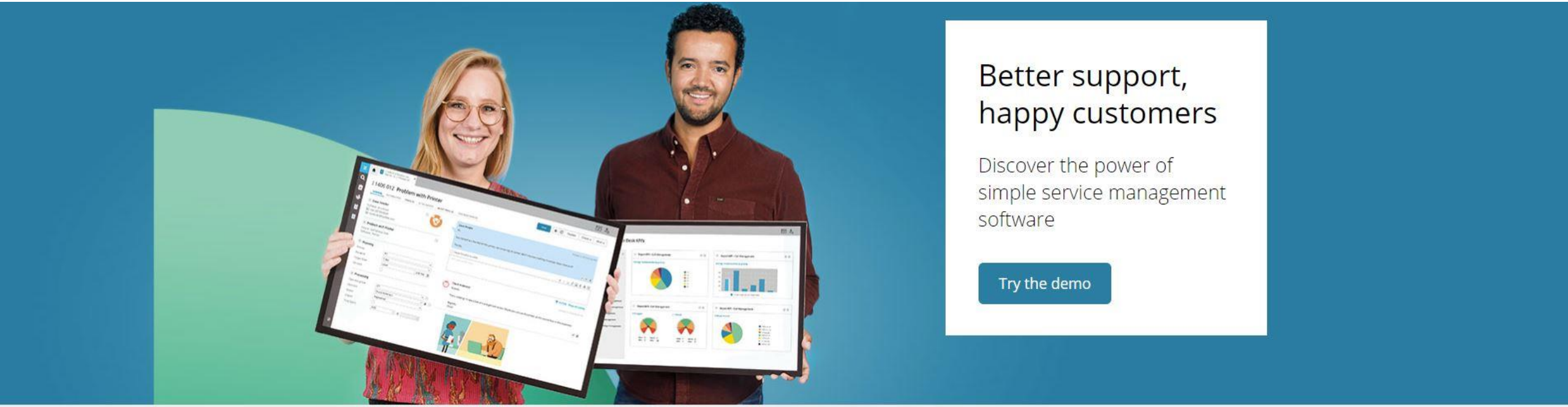
Why: Enabling shift-left by offering knowledge to users that don’t have an account in TOPdesk



Public knowledge items



Public knowledge items



Excellent service management made easy

Happy customers are the goal of every supporting department. We understand. That's why we've created a solution that helps you improve customer communication, manage workflows and keep track of assets. But above all: our software is simple and attractive. This not only makes it pleasant to use, but also quick to adopt. You're looking to deliver excellent service from day one – and TOPdesk is here to help.

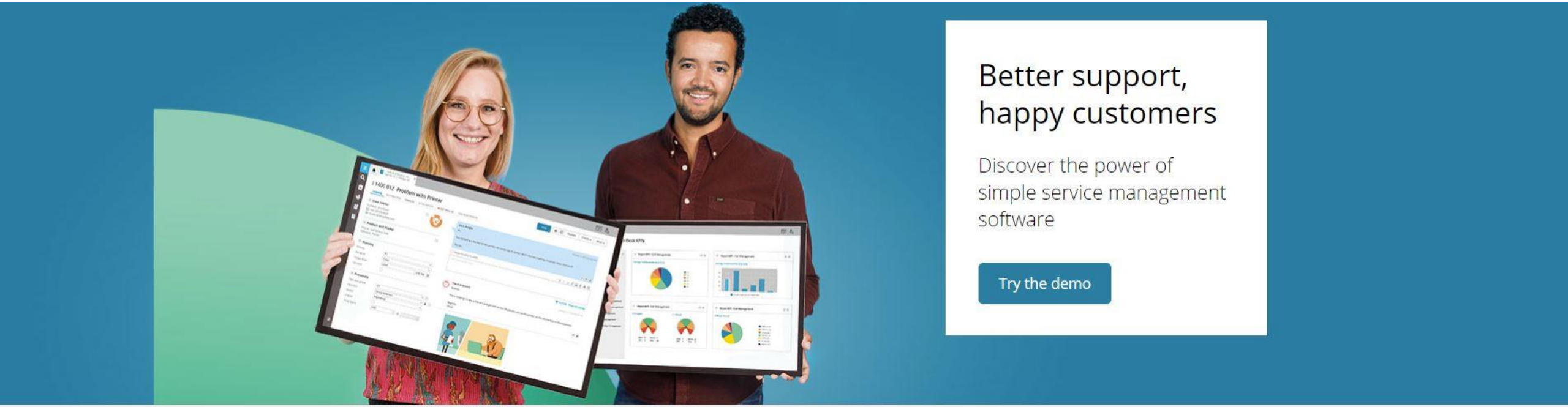
★★★★★ Feb 4, 2019

"We have been on TOPdesk for 10 years; the onboarding experience was great and I would guess it has only improved.

Jay Hamel
Sr. Vice President & C.O.O.
Information Technology and Services | 11-50 em...

Read full review

Place an iframe on any website



Example of embedded knowledge item

KI 0149

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus a arcu pretium, venenatis augue sit amet, faucibus quam. Nullam sed ullamcorper orci, id elementum ligula. Nulla quis metus vitae enim varius vulputate et et ipsum. Nam vel ipsum nec risus lacinia hendrerit. Aenean vel ultricies eros. In sed pharetra tellus, ac vestibulum erat. Nunc ornare tellus quis magna gravida sagittis. Mauris sit amet dignissim mauris. Vivamus faucibus commodo lobortis. Curabitur nunc dui, pretium nec dictum egestas a massa. Aliquam erat volutpat. In a pharetra erat.

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Sr. Vice President & C.O.O.
Information Technology and Services | 11-50 em...

Read full review

Place an iframe on any website

Public knowledge items

Version: Available in Labs on SaaS, aiming for Q3 on-premises

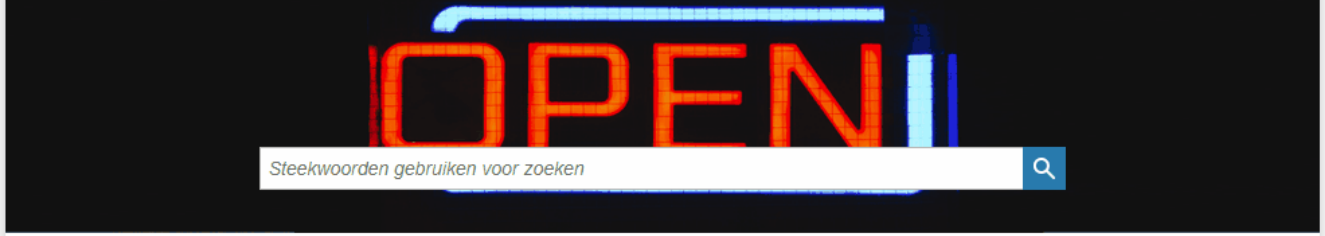
More information: blog.topdesk.com/updates/public-knowledge-items

Chat

What: A new TOPdesk module offering a native chat solution in TOPdesk

Why: Enabling customers to be reachable through multiple channels

Chris Lewis



Steekwoorden gebruiken voor zoeken

My Requests

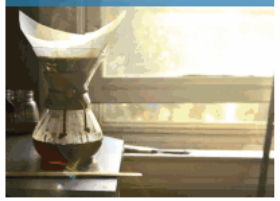
Nieuwe reservering 'Ruimtes'

Mijn Werkplek

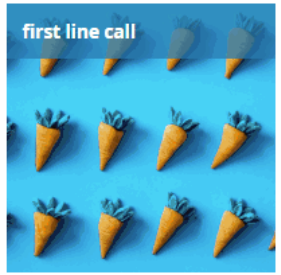
Contact & Feedback

Trend report of logged and resolved calls

Nieuwe reservering middel

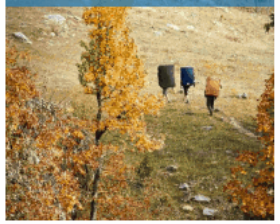


first line call



Toegang tot Business Software

Test CHRISF



augsburg rapp

Kennisitem

Mijn reserveringen

Actuele storingen 3

Published major!

Dit is een testmajor

This has a checklist.

Autorisatie-overzicht openen

Nieuws 1

Welkom bij TOPdesk

TOPdesk helpt uw dienstverlening verbeteren. Of het nu gaat om uw IT-afde

Chat

Start a chat

Welcome Dawn Meadows **on the homepage of TOPdesk**

Add widget

Tasks

Module		
First Line Calls	8	38
Second Line Calls	0	0
Problems	0	0
Partial Problems	0	0
Known Errors	1	3
Requests for Change (Waiting for authorization)	1	46
Simple Changes	3	34
Extensive Changes (Waiting for authorization)	1	9
Change Activities	17	249
Authorization Activities	1	7
All Changes as Coordinator	26	173
Project Activities	5	49
Expected today (not yet checked in)	0	
All Visitors Present	0	
Operational Activities (this week)	2	4
Reservation Requests	0	14
Reserved Services (today)	0	0

Task per group

Application management		
Calls	0	5
Change Activities	0	5
Project Activities	1	2
Facilities management		
Calls	1	18
Problems and Known Errors	0	2
Simple Changes	0	9
Change Activities	0	15
Operational Activities	0	185
IT Services		
Calls	1	7
Problems and Known Errors	1	3

Report/KPI - Call Management

kpi test

Now 0 *Norm* 50
Min. 0 *Max.* 6

Main pages

Modules | Kanban Board | Settings | Services Task Board | Task Board | Plan Board | Dashboard

Latest News

Welcome to TOPdesk January 5, 2016

This is the TOPdesk demonstration version.
TOPdesk offers different systems: TOPdesk Professional and TOPdesk Enterprise.

To get a better understanding of which TOPdesk suits you best please contact our Sales team on +44 207 8034200 or at info@topdesk.co.uk.

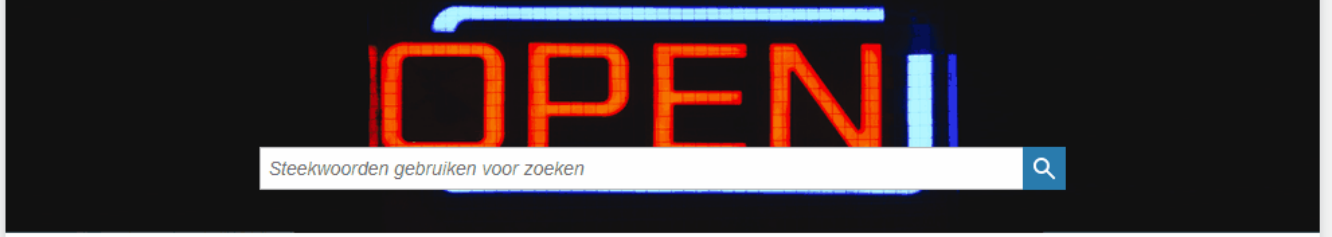
Many School email accounts are currently receiving suspicious emails asking you to click on a link to reset your password. These emails appear to originate from valid School accounts. We are aware and have taken measures to deal with this. If you have received these emails don't worry, there is no need to inform us.

If you think you have clicked the link and provided your account credentials in response please change your network password immediately and report this to us via the "help me" form in the Contact us section of this portal.

Report/KPI - Call Management

KPI logged KPI solved

Chris Lewis



Steekwoorden gebruiken voor zoeken

STARTPAGINA › MIJN WERKPLEK

Mijn Werkplek

What topic is your question/request about?

Standard workspace

Standard workspace services

Mobile phone services

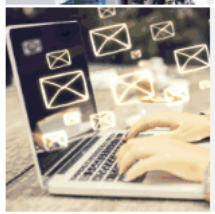
Everything you need to know about our mobile phone policy.

Printer Services

Print, copy and scan services

Networks & Connectivity

Includes the company network, wifi, VPN



E-mail & Calendar Services

Availibilty and communication tools

Accessories & Peripherals

Keyboard, mouse, monitor and webcam

Mijn objecten

Kennisitem

Kennisitem

Chatting with Dawn Meadows

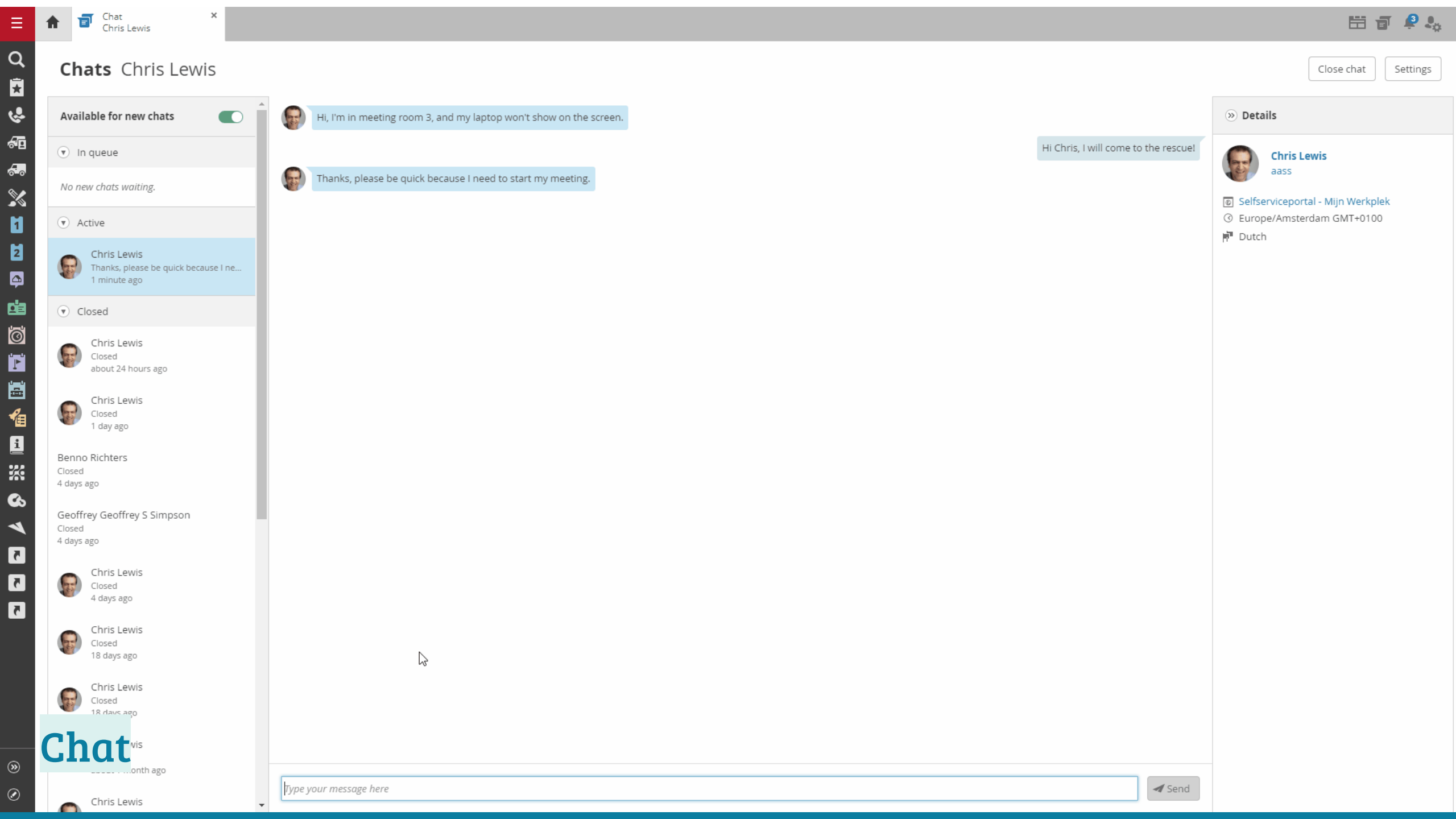
Hi, I'm in meeting room 3, and my laptop won't show on the screen.

Dawn Meadows has joined the chat.

Hi Chris, I will come to the rescue!

Type your message here

Chat


Chat
Chris Lewis
Chats Chris Lewis
Close chat
Settings
Available for new chats
In queue
No new chats waiting.
Active
Chris Lewis
Thanks, please be quick because I ne...
1 minute ago
Closed
Chris Lewis
Closed
about 24 hours ago
Chris Lewis
Closed
1 day ago
Benno Richters
Closed
4 days ago
Geoffrey Geoffrey S Simpson
Closed
4 days ago
Chris Lewis
Closed
4 days ago
Chris Lewis
Closed
18 days ago
Chris Lewis
Closed
Hi, I'm in meeting room 3, and my laptop won't show on the screen.
Hi Chris, I will come to the rescue!
Thanks, please be quick because I need to start my meeting.
Type your message here
Send
Details
Chris Lewis
aass
Selfserviceportal - Mijn Werkplek
Europe/Amsterdam GMT+0100
Dutch

Chat

Version: Available in Labs on SaaS; On-premises Q2 or Q3

Paid module: 2 module points

More information: page.topdesk.com/chat

Coming up

Chat queues

What: Operator groups in Chat

Why: Enabling routing of incoming chats to directly connect you to the correct operator

Version: Q2 on SaaS, Q3 on-premises

Coming up

Basic Collaboration Platform

What: One central platform to connect multiple service management applications.

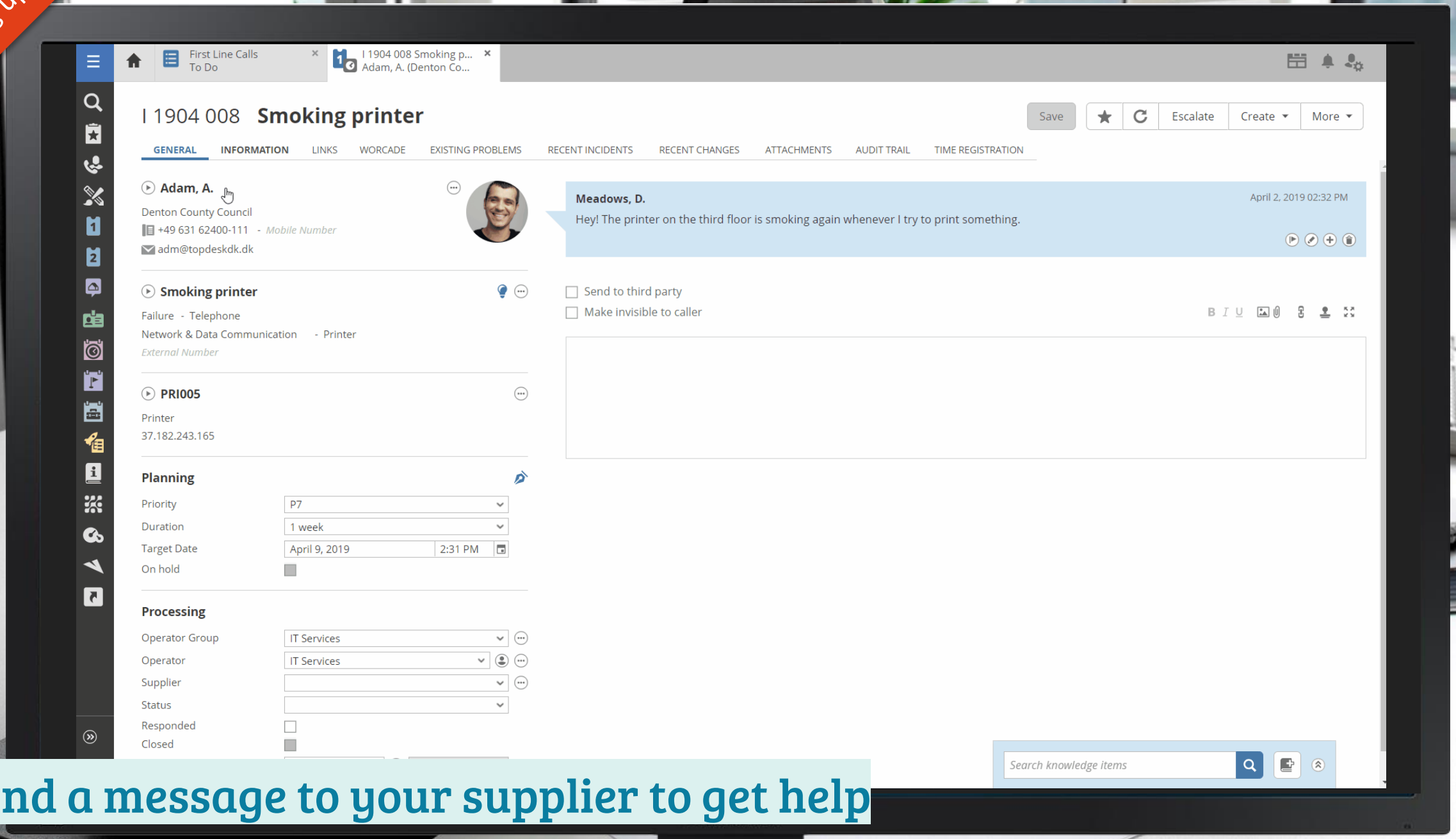
Why: To achieve service excellence over the full service chain by improving the collaboration with third parties.

Coming up

Let's first take a look at the message sharing possibilities.

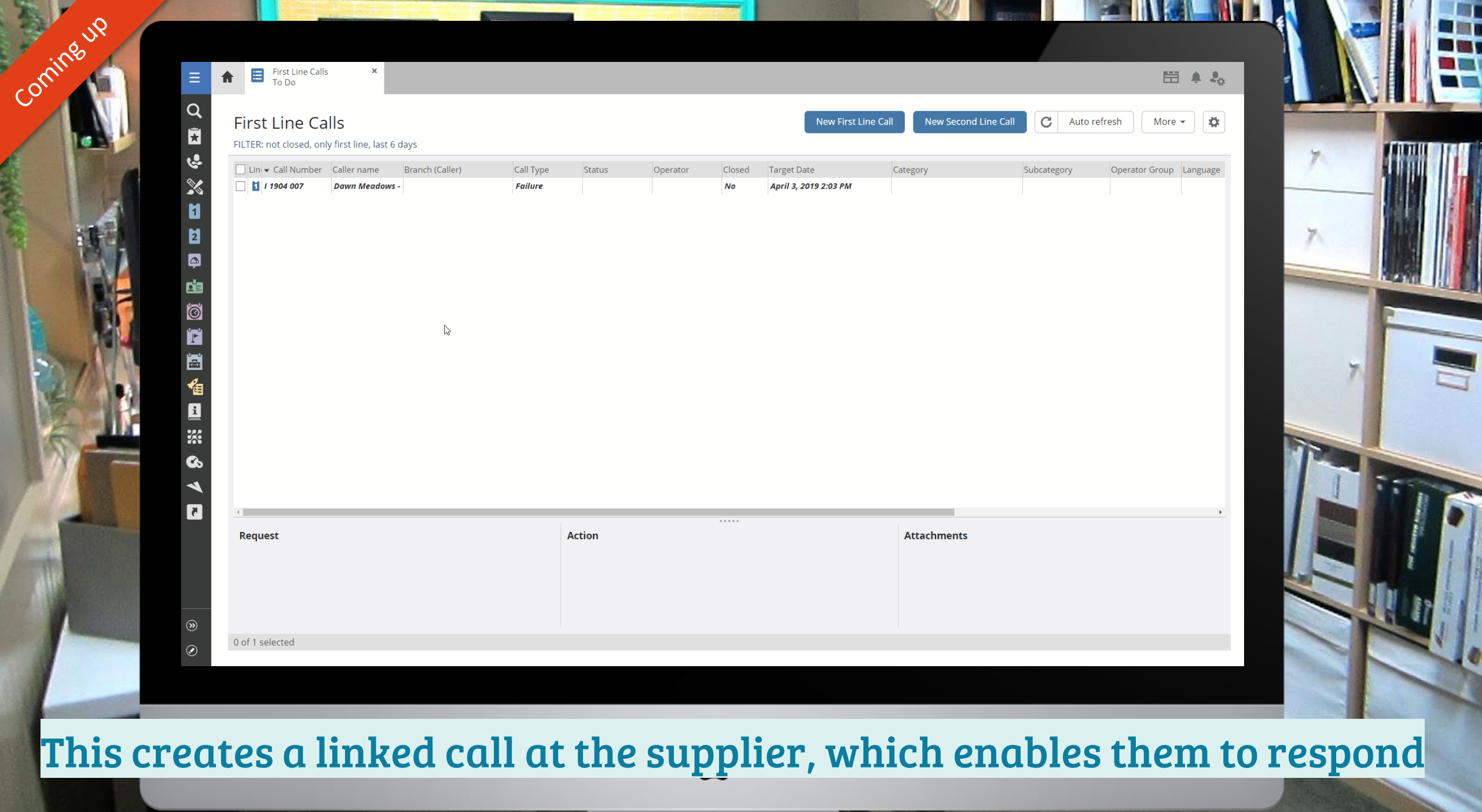
Coming up
Canon

Coming up



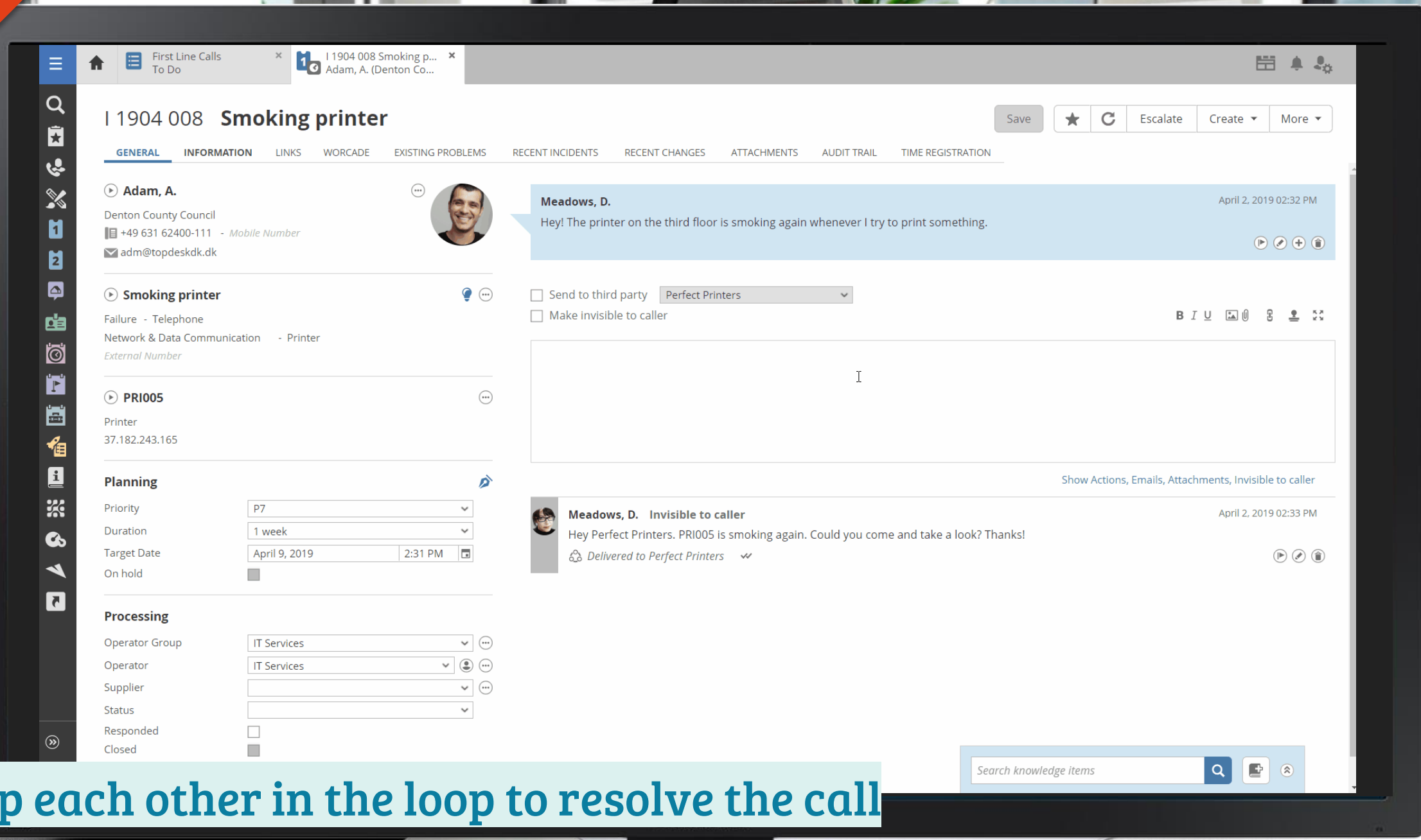
Send a message to your supplier to get help

Coming up



This creates a linked call at the supplier, which enables them to respond

Coming up

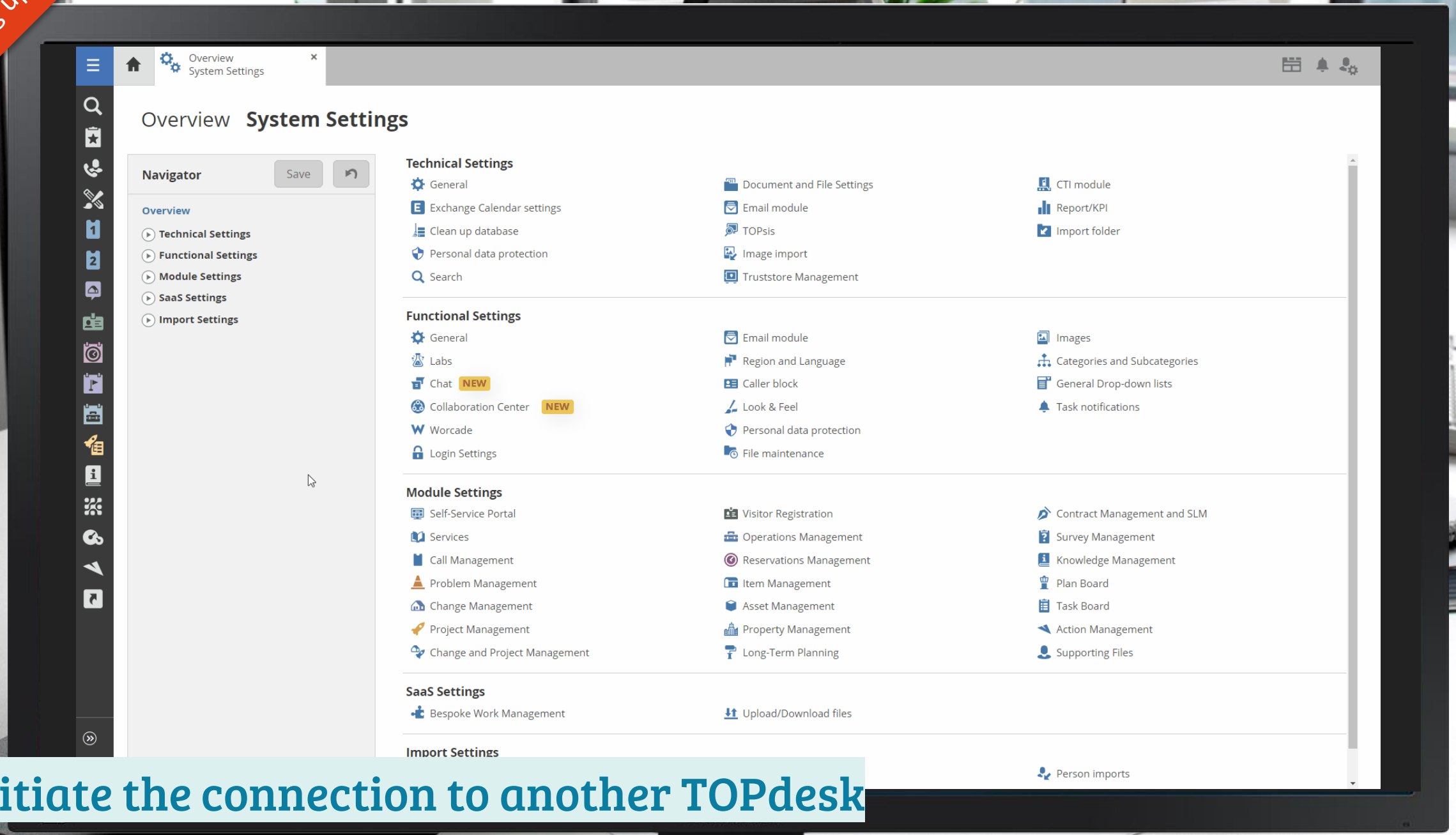


Keep each other in the loop to resolve the call

Coming up

Secondly, let's see how you set this up.

Coming up



Initiate the connection to another TOPdesk

Coming up

Functional Settings
Collaboration Center

Functional Settings **Collaboration Center**

Navigator Save

- Overview
- Technical Settings
- Functional Settings
  - General
  - Labs
  - Chat NEW
  - Collaboration Center NEW
  - Worcade
  - Login Settings
  - Email module
  - Region and Language
  - Caller block
  - Look & Feel
  - Personal data protection
  - File maintenance
  - Images
  - Categories and Subcategories
  - General Drop-down lists
  - Task notifications
- Module Settings
- SaaS Settings
- Import Settings

LABS Welcome to the TOPdesk Collaboration Platform. Want to know more about upcoming features? Go to our website

Setup

Organization name: Perfect Printers

This is how you will be seen by your collaboration partners.

Service operator: Collaboration Platform

This operator will act as a special service operator that will create and update calls on behalf of your partner. The operator should have read permissions on 'REST API' and read, write and create permissions on 'First line calls' and 'Second line calls'. The operator should not have administrator permissions.

Connections

Organizations with which you can collaborate

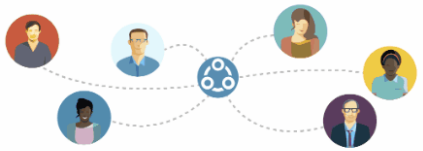
Organizations

No connections yet

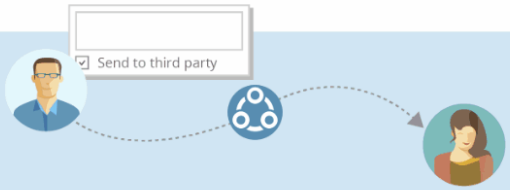
Create a connection code | Use a connection code

Give us feedback

Seamless collaboration with partners and suppliers



"Working efficiently with my suppliers allows me to focus more on my core business."



And confirm it on the other side!

Coming up

Basic Collaboration Platform

Version: Available in Labs on SaaS in Q2

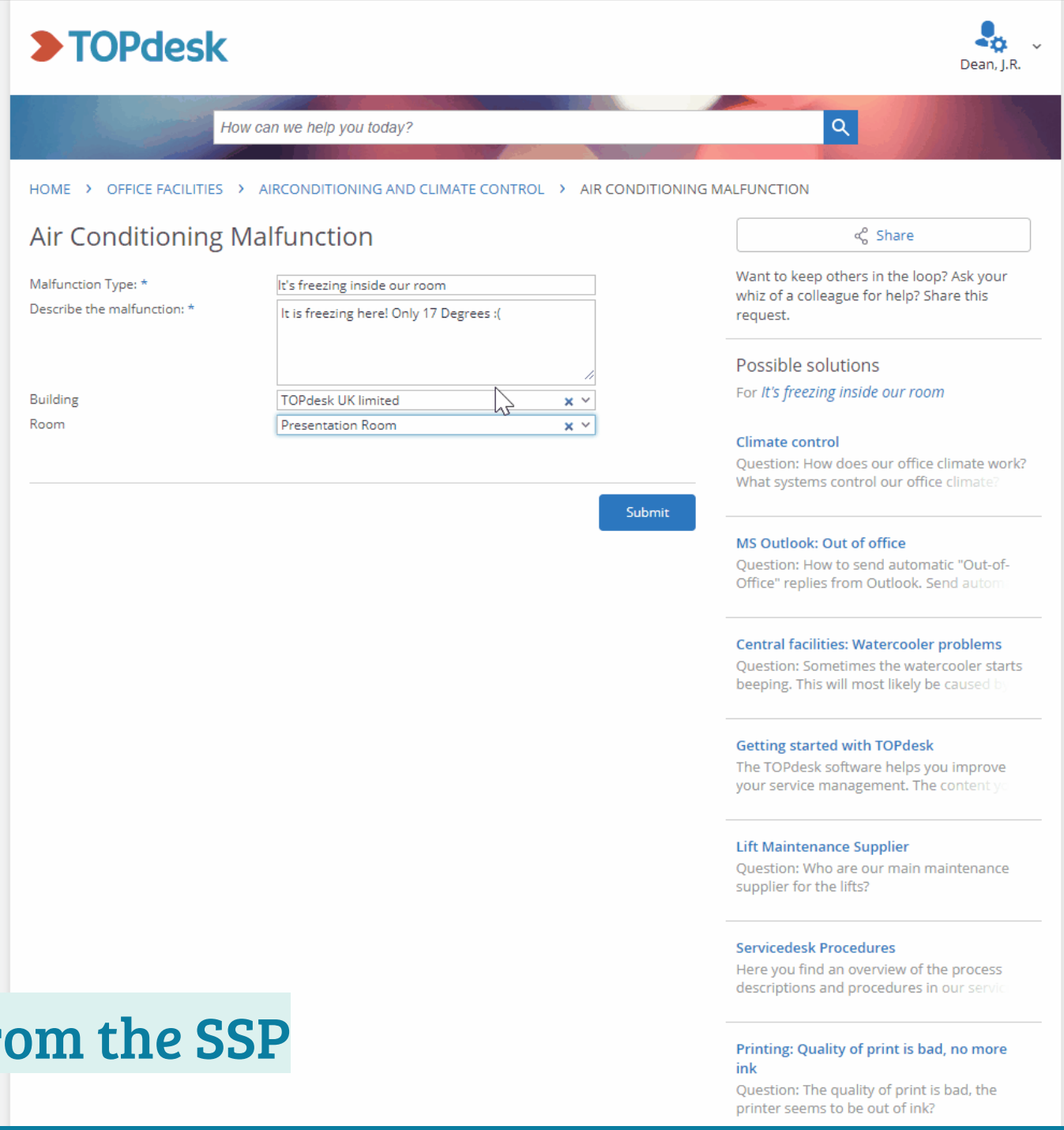
NL-3 data center hosted instances only

More information: page.topdesk.com/collaboration-platform

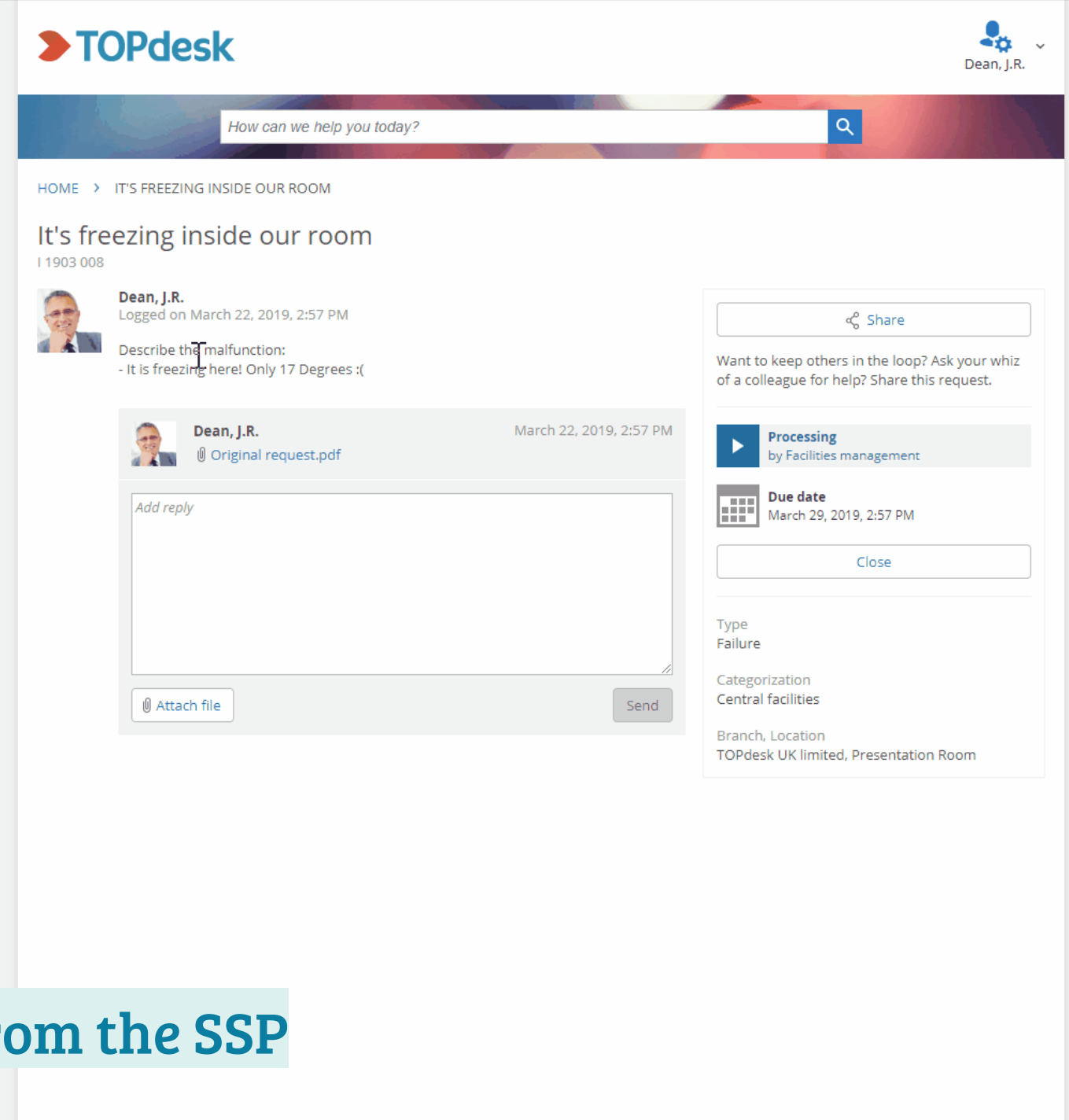
Share & Subscribe from the SSP

What: Sharing relevant calls with another affected user from the Self-Service Portal.

Why: To further enable the sharing of knowledge between users and, in the end, improve their collaboration.



Sharing a call from the SSP



Sharing a call from the SSP

Share & Subscribe from the SSP

Version: Available on SaaS in Labs

More information: blog.topdesk.com/updates/sharing-calls

Coming up

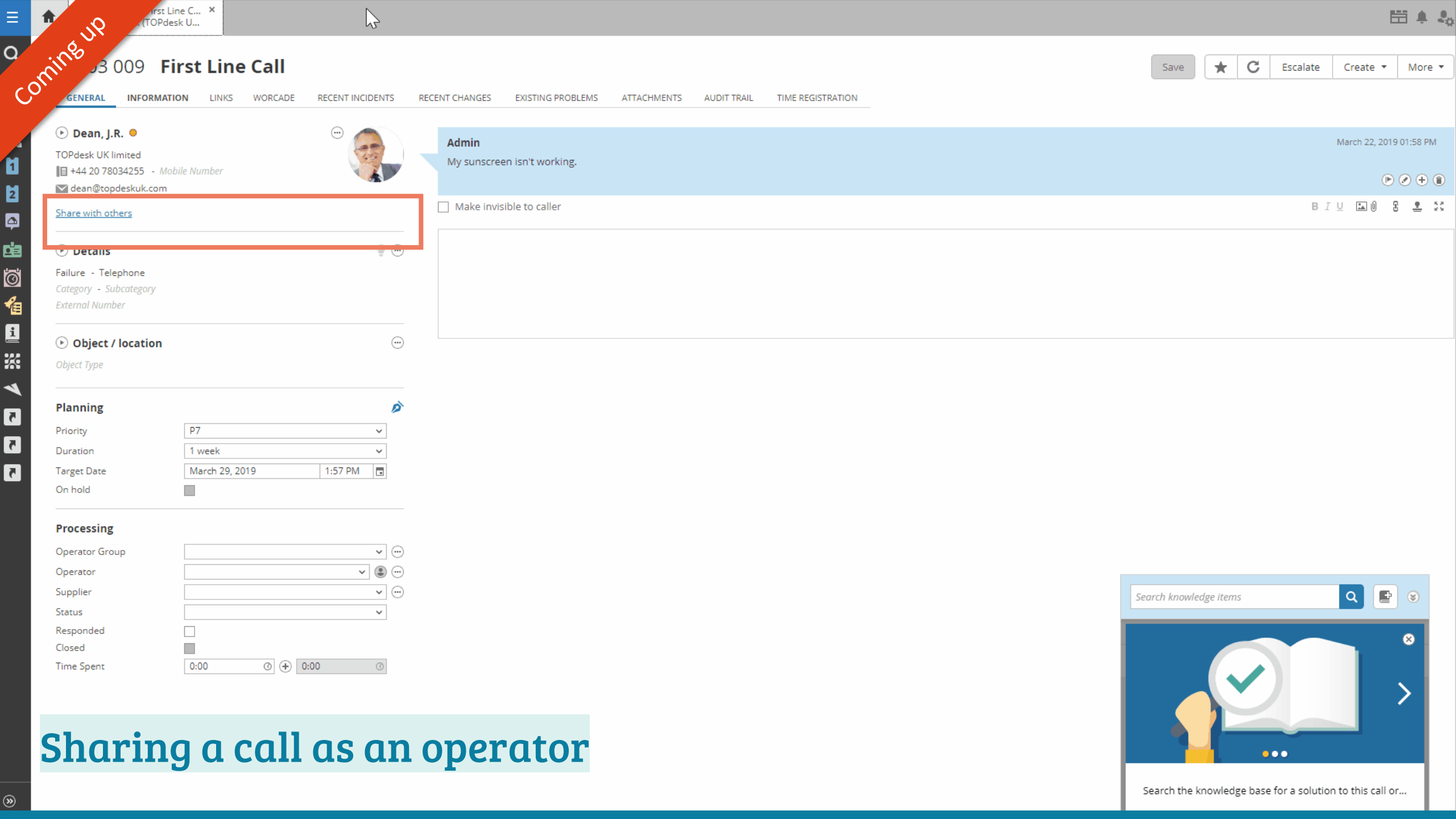
Share & Subscribe as an operator

What: Sharing relevant calls with another affected user as an operator.

Why: To further enable smooth collaboration between users.

Coming up

Sharing a call as an operator



Coming up

Share & Subscribe as an operator

Version: Aiming for Q2 on SaaS in Labs

Let’s talk about Artificial Intelligence

Smart Categorization (AI)

What: Machine learning for categorization suggestions

Why: Help operators register calls more quickly and immediately gain the benefits of categorization for follow-up

I 1903 011 New First L...
Adam, A. (TOPdesk D...

I 1903 011 New First Line Call

Save | Escalate | Create | More

GENERAL | INFORMATION | LINKS | WORCADE | EXISTING PROBLEMS | RECENT INCIDENTS | RECENT CHANGES | ATTACHMENTS | AUDIT TRAIL | TIME REGISTRATION

Caller

Name: Adam, A.
Branch: TOPdesk Deutschland Gmb
+49 631 62400-111 - *Mobile Number*
adm@topdeskdk.dk

Details

Brief Description:
Entry: Telephone
Call Type: Failure
Category:
Subcategory:
External Number:

Object / location

Concerning: Object / Location
Object ID:
Object Type:

Planning

Priority: P7
Duration: 1 week
Target Date: March 29, 2019 9:23 AM

Processing

Operator Group:

Send to third party
Make invisible to caller

Search knowledge items

Category suggestions with machine learning

Smart Categorization (AI)

Version: Available on SaaS in Labs

Coming up

Automatic knowledge translations (AI)

What: Use external AI via our API to translate knowledge items within TOPdesk

Why: Save customers time and costs by automating the knowledge translation process

Version: Aiming for Q3 on SaaS

Coming up

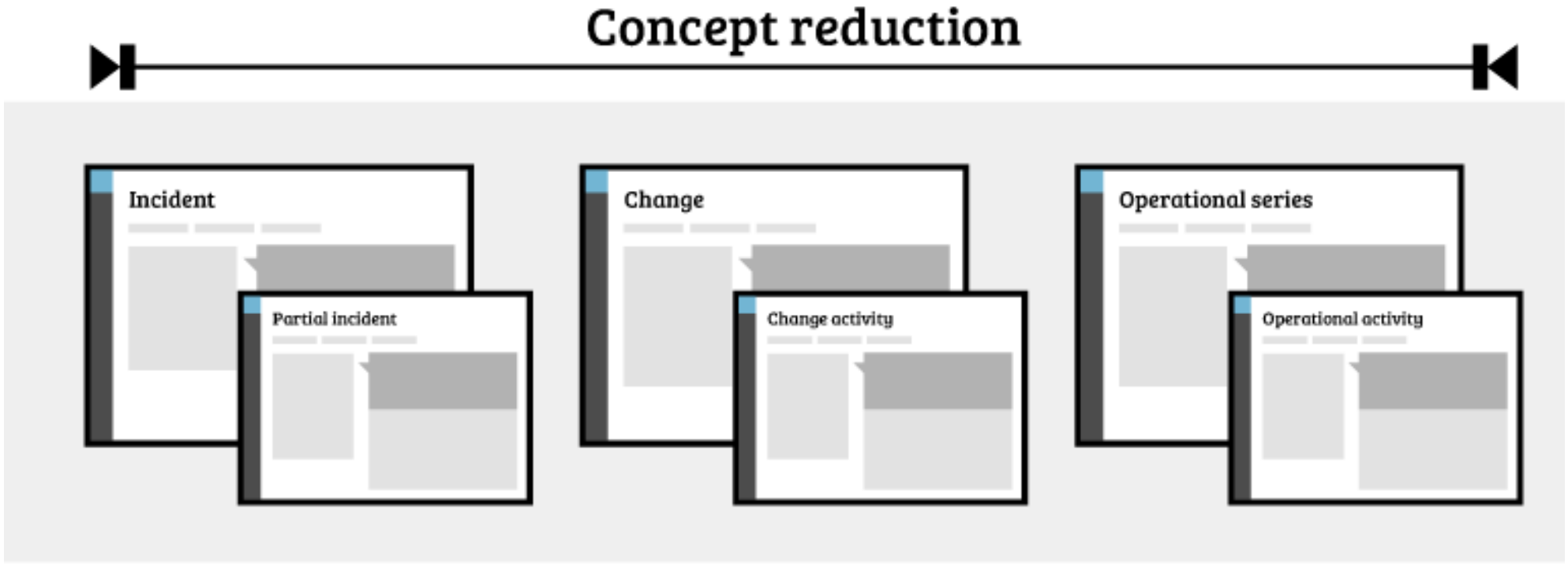
Resolve Time Predictions (AI)

What: Predictive Analysis with AI to predict and present predicted resolve times of calls.

Why: Improve Service Excellence by proactively supporting operators and/or end-users.

Version: Aiming for late 2019 on SaaS

Tasks & Workflows



Checklists in second line incidents

What: Checklists in second line incidents

Why: Templated sub-tasks for easier collaboration and consistency in incident resolution

IM 1903 10089 Secon...
John Dean (Skate-plaza)

IM 1903 10089 Second Line Call

Save | Create | More

GENERAL | INFORMATION | LINKS | COSTS | WORCADE | CUSTOMER SATISFACTION | CONFIDENTIALILTY | PROCEDURE | ATTACHMENTS | AUDIT TRAIL | TIME REGISTRATION

John Dean
Skate-plaza
+44 20 78034255 - *Mobile Number*
Management - Management

Details
Failure - Telephone
Hardware - Laptop
External Number

LAP021
Laptop
Skate-plaza - Facilities

Checklist
Use a checklist to add subtasks. Create a new list or apply tasks from a template.

New subtask | Apply template

Planning

Impact	Person
Urgency	Normal
Priority	
Duration	8 hours
Target Date	March 25, 2019 11:48 AM
On hold	
Monitored	
Expected Time Spent	0:00

Processing

Operator	IT Services

Make invisible to caller

Responded
Completed
Closed

Search knowledge items

Checklists in second line incidents

IM 1903 10090 New S...
John Dean (Skate-plaza)

IM 1903 10090 New Second Line Call

Save | Create | More

GENERAL * | INFORMATION | LINKS | COSTS | WORCADE | CUSTOMER SATISFACTION | CONFIDENTIALILTY | PROCEDURE | ATTACHMENTS | AUDIT TRAIL | TIME REGISTRATION

Caller

Name: John Dean
Branch: Skate-plaza
Network login name:
+44 20 78034255 - *Mobile Number*
Management - Management

Details

Brief Description:
Entry: Telephone
Call Type: Failure
Category *:
Subcategory *:
External Number:

Object / location

Concerning: Object / Location
Object ID:
Object Type:

Checklist

To use a checklist, save the card first

Planning

Impact: Person
Urgency: Normal
Priority:
Duration: 8 hours
Target Date: March 25, 2019 11:56 AM
On hold:

Make invisible to caller

Checklists in second line incidents

Processing

Operator: IT Services
Operator Group: IT Services

Search knowledge items

Checklists in second line incidents

Version: Available on SaaS in Labs, aiming for Q4 on-premises

More information: blog.topdesk.com/updates/checklists-in-calls-templates

Checklist template manager

What: Overview to manage checklists

Why: Gives control over the number of templates and their content, ensuring quality and reliability

IM 1903 10089 Secon...
John Dean (Skate-plaza)

IM 1903 10089 Second Line Call

Save | Create | More

GENERAL | INFORMATION | LINKS | COSTS | WORCADE | CUSTOMER SATISFACTION | CONFIDENTIALILTY | PROCEDURE | ATTACHMENTS | AUDIT TRAIL | TIME REGISTRATION

John Dean

Skate-plaza
+44 20 78034255 - *Mobile Number*
Management - Management

Details

Failure - Telephone
Hardware - Laptop
External Number

LAP021

Laptop
Skate-plaza - Facilities

Checklist 3/3

- [x] Get laptop — IT Services
- [x] Place laptop — IT Services
- [x] Inform caller — Dawn Meadows

New subtask | Apply template

Make invisible to caller

Planning

Impact	Person
Urgency	Normal
Priority	
Duration	8 hours
Target Date	March 25, 2019 11:48 AM
On hold	

Checklist template manager

Processing

Operator: IT Services

Search knowledge items

IM 1903 10089 Secon...
John Dean (Skate-plaza)

IM 1903 10089 Second Line Call

Save | Create | More

GENERAL | INFORMATION | LINKS | COSTS | WORCADE | CUSTOMER SATISFACTION | CONFIDENTIALILTY | PROCEDURE | ATTACHMENTS | AUDIT TRAIL | TIME REGISTRATION

John Dean

Skate-plaza
+44 20 78034255 - *Mobile Number*
Management - Management

Details

Failure - Telephone
Hardware - Laptop
External Number

LAP021

Laptop
Skate-plaza - Facilities

Checklist 3/3

- [x] Get laptop — IT Services
- [x] Place laptop — IT Services
- [x] Inform caller — Dawn Meadows

New subtask | Apply template

Make invisible to caller

Planning

Impact	Person
Urgency	Normal
Priority	
Duration	8 hours
Target Date	March 25, 2019 11:48 AM
On hold	

Checklist template manager

Processing

Operator: IT Services

Search knowledge items

Checklist template manager

Version: Available on SaaS in Labs, aiming for Q4 on-premises

More information: blog.topdesk.com/updates/checklists-in-calls-templates

Coming up

Sequential workflows

What: Sequential workflows with tasks depending on each other

Why: Enabling complex changes (for example across departments) to be worked on at the right times

Version: Aiming for Q3 on SaaS

Coming up

Mobile for operators

What: Progressive Web App based on the new Task system

Why: Enabling working on your todo anywhere and anytime

Coming up

Mobile for operators

Coming up

Mobile for operators

Version: Aiming for Q3 on SaaS

Overview what else is built or coming up

- Kanban board enhancements
- Asset Management organizational filters
- Virtual appliance
- OData filtering
- Response times agreements & reporting
- Work instructions for operators
- Asset audit

We'll email you an overview tomorrow

Finding more information

Update blog and monthly newsletter	blog.topdesk.com/updates
Roadmap	productroadmap.topdesk.com
Release notes	releasenotes.topdesk.com

Thank you for attending

We’d love to hear from you!

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