

# **MANUAL HOUR REGISTRATION IN TOPDESK - EXTERNAL CONSULTANT**

14th May 2019

## Document details

Date: 14th May 2019  
Client:  
Document type: Manual  
Classification: Public  
Version: 2.0  
Status: final

## Version control

Changed by: [Changed by]  
Version: [Version]  
Distribution: [Distribution]  
Process stage: [Process stage]  
Comment(s): [Comment(s)]

### © Copyright Ctac 2019

No part of this document may be reproduced, stored in a computerized database or disclosed in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written permission of Ctac. The only permitted exception to this is the distribution among those consultants of the addressee of this document who are responsible for the evaluation of this document.

## TABLE OF CONTENTS

<b>1. INTRODUCTION .....</b>	<b>4</b>
<b>2. TOPDESK – LOGGING IN .....</b>	<b>5</b>
<b>3. SELECTING, UPDATING AND CLOSING A MESSAGE .....</b>	<b>7</b>
3.1. Searching for a message.....	7
3.1.1 <i>Overview of tasks</i> .....	7
3.1.2 <i>Search function</i> .....	7
3.2. Processing a message.....	8
3.3. Asking for customer agreement – planned hours .....	9
3.4. Updating a message.....	9
3.4.1 <i>Adding text</i> .....	9
3.4.2 <i>Adding an attachment</i> .....	9
3.4.3 <i>Status of message and message ownership</i> .....	10
3.4.4 <i>Informing customer</i> .....	10
3.4.5 <i>Escalation of the call</i> .....	10
3.5. Increasing planned hours.....	11
3.6. Closing a message .....	12
<b>4. REGISTERING HOURS .....</b>	<b>13</b>
4.1. Registering hours.....	13
4.1.1 <i>Type of messages</i> .....	13
4.1.2 <i>Normal message/change</i> .....	13
4.1.3 <i>Standard change</i> .....	15
4.1.4 <i>Overview</i> .....	16
4.1.5 <i>Correcting / restoring a booking</i> .....	16
4.1.6 <i>Important client information</i> .....	16

## **1. INTRODUCTION**

This manual explains how hours should be booked in TOPdesk and how the message should be updated. The hours must be booked weekly and must also be complete on the last working day of the relevant month.

You will receive a weekly email with an overview of the hours booked for the week in question. You should always check that this matches with your own administration. If you have not booked any hours yet, you will receive an email with the request to still book your hours.

The functionality of TOPdesk works best if you use Google Chrome as your internet browser.

If there are any problems with the time registration in TOPdesk, you can contact the Invoicing department by email: [facturatie@ctac.nl](mailto:facturatie@ctac.nl). Please give us the clearest possible problem definition, possibly together with screen prints, and we will then contact you ASAP.

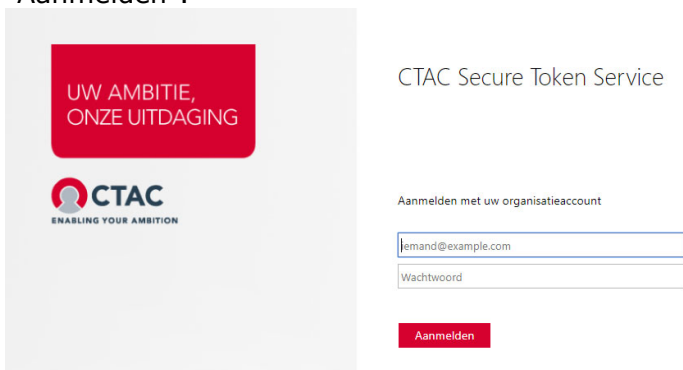
## 2. TOPDESK – LOGGING IN

TOPdesk is used to record the hours worked on messages concerning maintenance activities at CTAC customers. As indicated in the introduction, the hours must be booked weekly and be complete by Sunday evening before 2400 hrs and before 2400 hrs on the last day of the month.

Ctac will pay you the hours based on the hours you have booked and no longer as a result of the invoice you send.

URL: <https://TOPdesk.ctac.nl/>

Enter the user/email address and password that you have received and then press on "Aanmelden".



UW AMBITIE,  
ONZE UITDAGING

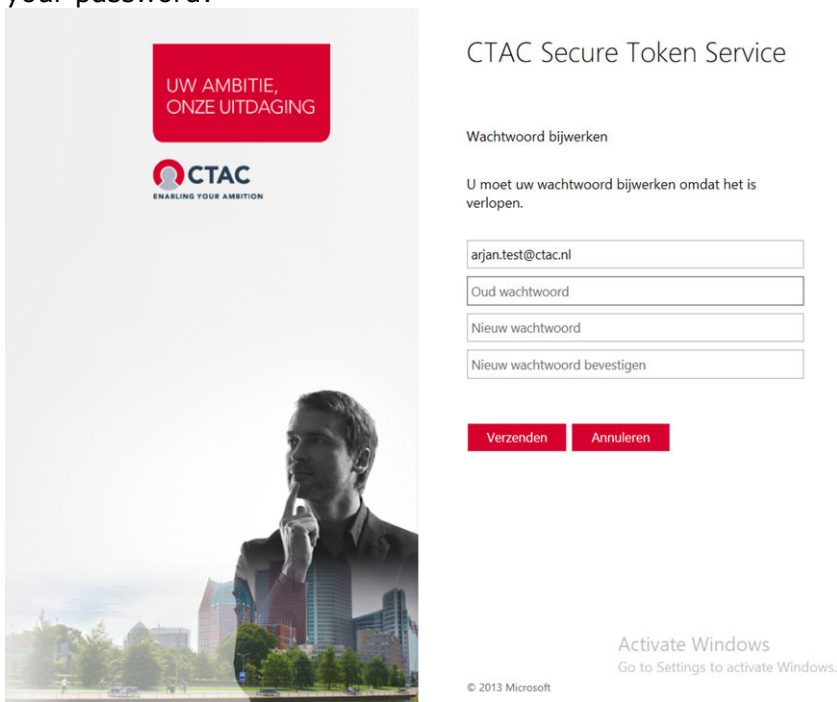
CTAC  
ENABLING YOUR AMBITION

CTAC Secure Token Service

Aanmelden met uw organisatieaccount

Aanmelden

If you are logging in for the first time or your password has expired, the next step is updating your password:



UW AMBITIE,  
ONZE UITDAGING

CTAC  
ENABLING YOUR AMBITION

CTAC Secure Token Service

Wachtwoord bijwerken

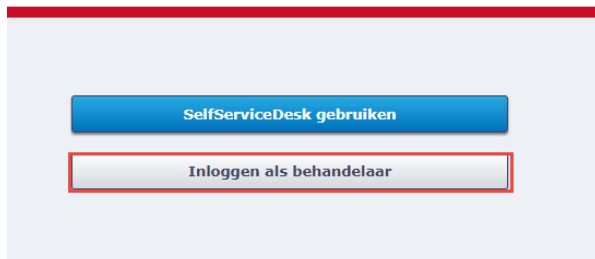
U moet uw wachtwoord bijwerken omdat het is verlopen.

Verzenden Annuleren

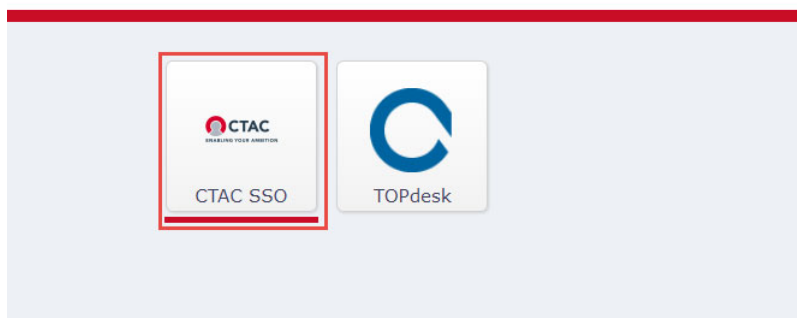
Activate Windows  
Go to Settings to activate Windows.

© 2013 Microsoft

Select "Inloggen als behandelaar":



Then click on 'CTAC SSO' (= Single Sign On) to access TOPdesk.



### 3. SELECTING, UPDATING AND CLOSING A MESSAGE

#### 3.1. Searching for a message

##### 3.1.1 Overview of tasks

As soon as you are logged in to TOPdesk, you will see the number of outstanding tasks / messages from your group and yourself on the left. The first column (see red arrow) are the outstanding messages in your name and the 2nd column is the total of any grouping which is covered by you. Clicking on the number of outstanding messages opens an overview with all messages in your name.

Module	My Tasks	Group Tasks
First Line Calls	0	0
Second Line Calls	15	16
Requests for Change (Waiting for authorization)	0	0
Simple Changes	8	15
Extensive Changes (Waiting for authorization)	1	1
Change Activities	3	4
Authorization Activities	0	0
Operational Activities (this week)	2	4

Module	My Tasks	Group Tasks
First Line Calls	0	3
Second Line Calls	15	89
Requests for Change (Waiting for authorization)	0	1
Simple Changes	8	78
Extensive Changes (Waiting for authorization)	1	16
Change Activities	3	32
Authorization Activities	0	0
Operational Activities (this week)	2	8

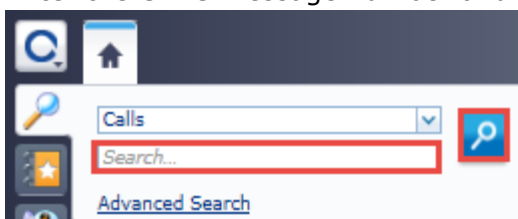
The message is opened by clicking on any cell in the relevant line.

##### 3.1.2 Search function

Another way to look up a message is to click on the magnifying glass:



Enter the CTAC message number and press enter.



**Note:** If the message is not visible, please contact CTAC Servicedesk. They could investigate the main cause of not showing the message.

### 3.2. Processing a message

Check whether the message has a different status than "new". If not, the message must be processed. This can be done by selecting "In operation" and then saving it.

Also check if the message is in your name and if necessary place the message on your name.

Depending on how the report is registered, it may look different. In both situations, you must check the "operator" field. Your name should be here. There are 2 possibilities:

Processing	
Operator Group	CMS-F-OM (CMS Functioneel - Operat) ▼ ▶
Operator	Pinxteren, Carlos van ▼ ▶
Supplier	▼ ▶
Status	In operation ▼
Completed	<input type="checkbox"/>
Closed	<input type="checkbox"/>

For the change operator field.

Authorize Implementation	
Authorization by	<input checked="" type="radio"/> Operator <input type="radio"/> Manager
Operator	Pinxteren, Carlos van ▼ ▶
Status	Waiting for Caller ▼
Go	<input type="checkbox"/>
No Go	<input type="checkbox"/>

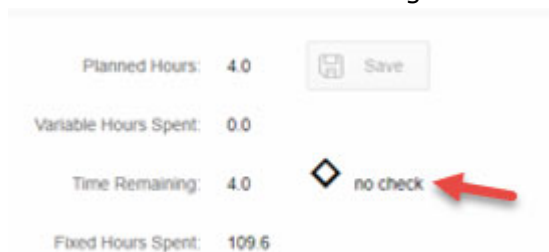


### 3.3. Asking for customer agreement – planned hours

The standard planned hours for messages is set at 4 hours. Within these 4 hours, the hours spent can be booked without an agreement about the message. If it is clear beforehand that more than 4 hours will be spent, or it becomes clear during the processing of the change / message, then the customer must be asked for approval prior to the execution of the work.


Make clear in this request what the estimated planned hours are likely to be and give a brief explanation of what you expect to spend the time on. Please note that several consultants could be involved on the same message. In that case, consult with the other consultants about what the planned hours could be.

If it says "no check" behind Time Remaining, then it is not mandatory to increase the planned hours in order to be able to register the hours.



Planned Hours: 4.0

Variable Hours Spent: 0.0

Time Remaining: 4.0 ◇ no check 

Fixed Hours Spent: 109.6

### 3.4. Updating a message

#### 3.4.1 Adding text

Once the customer has agreed, the next step is to add the agreement to the message. Save the mail locally and go to "General" tab where the mail with the agreement can be added to the "action" field, see section 3.4.2.

In the text field under the heading "Action", there is room to mention important information regarding the progress of the message. For example by how many hours the planned hours have been increased. It is important to add as much relevant information as possible so that customers, consultants, Customer Care Managers, Service Desk etc. have a clear picture of the progress of the message at all times.

#### 3.4.2 Adding an attachment

The customer confirmation can be added as an attachment by using the paper clip on the right hand side of the text box. If the customer has given their consent, you should state next to the name of the contact person that the customer has agreed to this orally.



**Action**

Make invisible to caller

Planned hours opgehoogd met \*\* uur. Akkoord klant bijgevoegd. 

### 3.4.3 Status of message and message ownership

Operator and Operator Group: the employee or group that will process the call.

The Operator of a call is also the main message processor of that call. If there are subordinate calls related to this call the operator of the main call is responsible for the handling of the complete call.

CTAC has several statuses for notifications in Topdesk:

- **New:** For calls that are not yet picked up for processing by an operator;
- **In operation:** Calls you are currently working on;
- **In operation by service provider:** Calls that are executed by a subcontractor (in case of underpinning contacts) or SAP;
- **Waiting for customer:** If you are waiting for response by a customer. E.g. for testing or additional information. This status need to followed up since we do not want to delay the executions of the call;
- **Response from customer:** If the customer sends an update on the call via the servicedesk, the status is changed to 'Response from customer';
- **Temporary Out of Operation:** If there is a good reason why we cannot process the call, for a period of time it is allowed to put it on temporary out of operation;
- **Live/Nazorg:** If a call is principally finished, but it needs to remain open for an agreed period of time (to confirm the fix), this status can be used;
- **Finished for process:** The call is finished for the operator. The closure process with the helpdesk will start from this point to finally close the call. This status also initiates a closure mail by Topdesk.

### 3.4.4 Informing customer

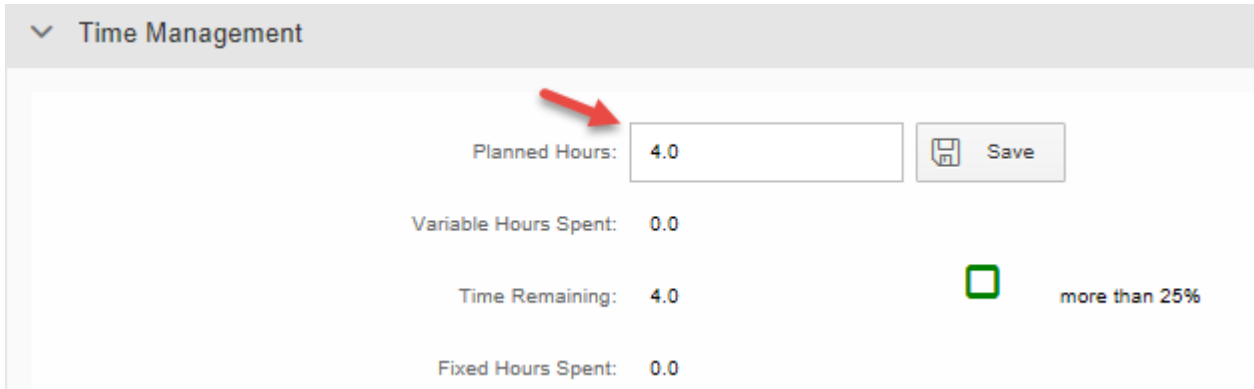
The customer will not be informed when you change the status of the message or adding extra information to the message. The customer needs to be informed separately.

### 3.4.5 Escalation of the call

If you are working on the message and the customer indicates that the message should be escalated or you have the idea that this is necessary, please contact our Servicedesk.

### 3.5. Increasing planned hours

After the customer has agreed, the planned hours can be increased. It is only possible to increase the planned hours if the message is in your name. The planned hours can be found under the heading "Time Management". Change the number to the new value and press the "save" button to save.



Time Management

Planned Hours:  Save

Variable Hours Spent: 0.0

Time Remaining: 4.0  more than 25%

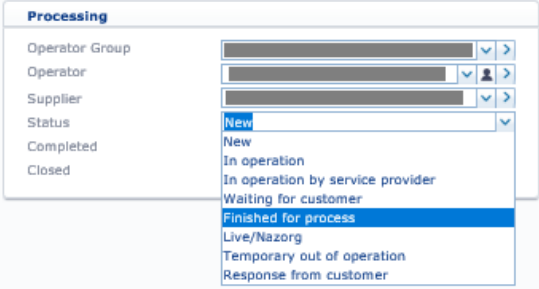
Fixed Hours Spent: 0.0

Should it not be possible to adjust the planned hours, contact [facturatie@ctac.nl](mailto:facturatie@ctac.nl).

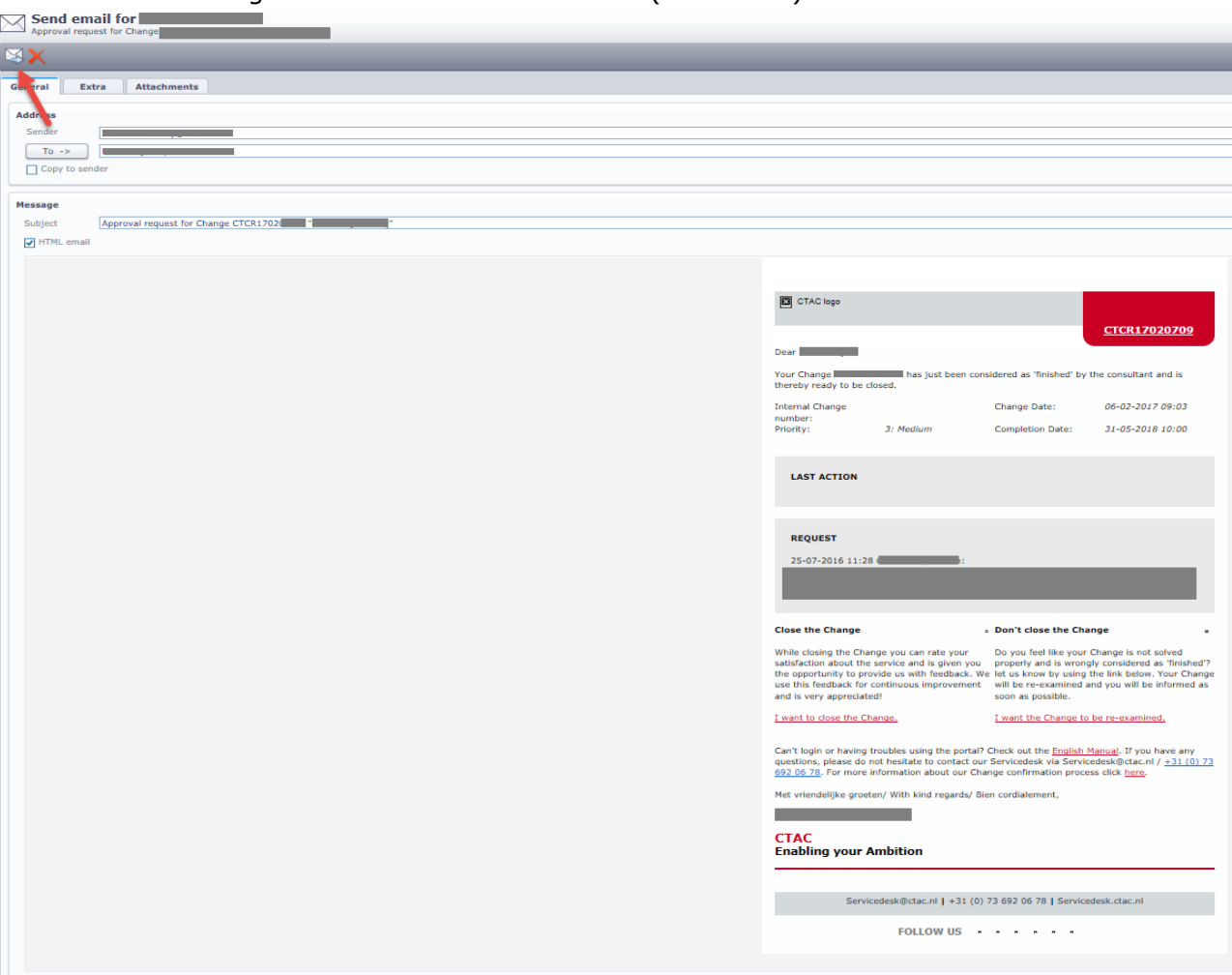
### 3.6. Closing a message

Once all hours have been booked and all conditions in the agreement have been fulfilled, and the customer indicates that all work has been carried out satisfactorily, the message can be closed.

Make sure that the message has been fully updated. Think of communication with the customer, updating the message, and any details during the course of the message. Then adjust the status to "finished for process".



An automatic mail is then generated concerning customer satisfaction and with the question whether the message can be closed. Press send (see arrow) to send a mail to the customer.



## 4. REGISTERING HOURS

### 4.1. Registering hours

#### 4.1.1 Type of messages

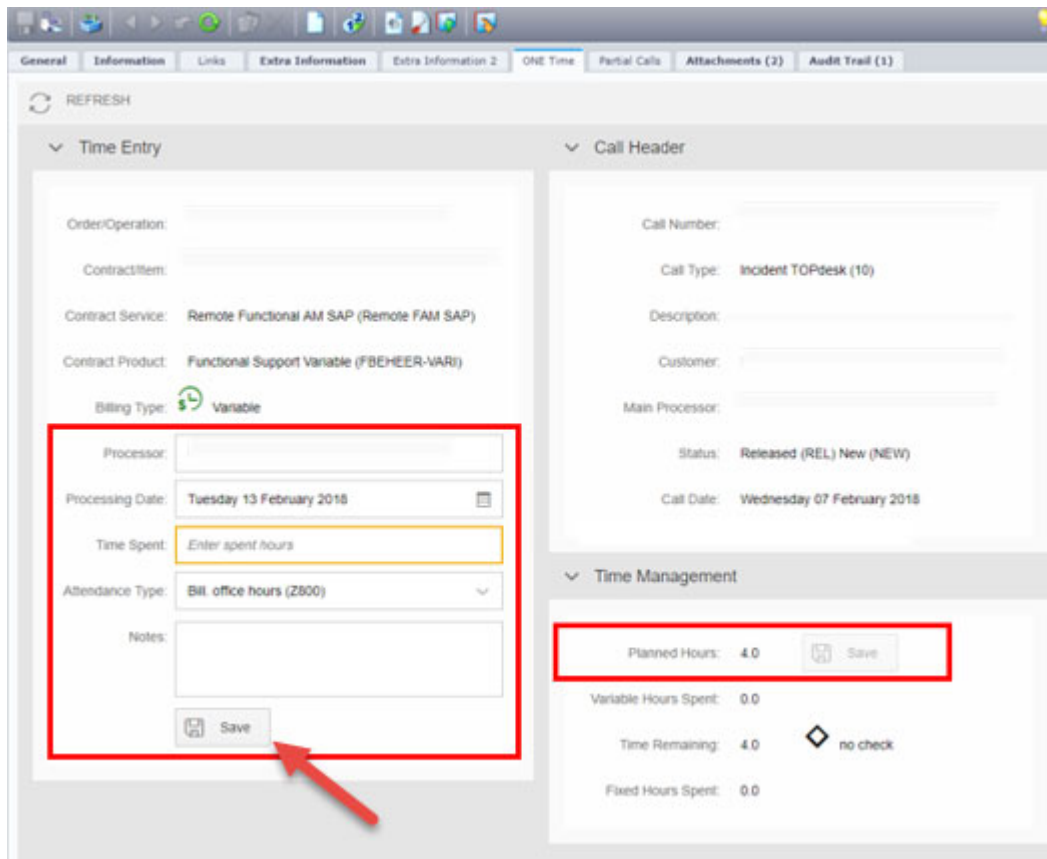
Hours for messages are registered in TOPdesk under the "ONE Time" tab. There are 2 possible situations:

1. Normal, variable message/change
2. Standard change

#### 4.1.2 Normal message/change

For a normal message/change, the following fields must be filled in:

Field	Description	Comments
Processor	The person who has performed work for the message and for whom hours must be written.	As default, Processor is in your name.
Processing Date	The date when the hours were worked.	
Time Spent	Number of hours worked	
Attendance Type	Different types of hours (e.g. productive hours or stand-by hours).	As default, this is set at Z800 – billable hours.
Notes	Field for adding optional text to clarify the hours worked.	
Planned Hours	Maximum number of hours that may be written on the message.	A standard 4 hours agreement is set in advance. For this, the customer does not have to give their agreement. If more than 4 hours are spent on the message, the main operator of the message must ask the customer to increase the planned hours. This agreement will then have to be added to the message. (see the "General" tab)



Press Save after filling in the required fields.

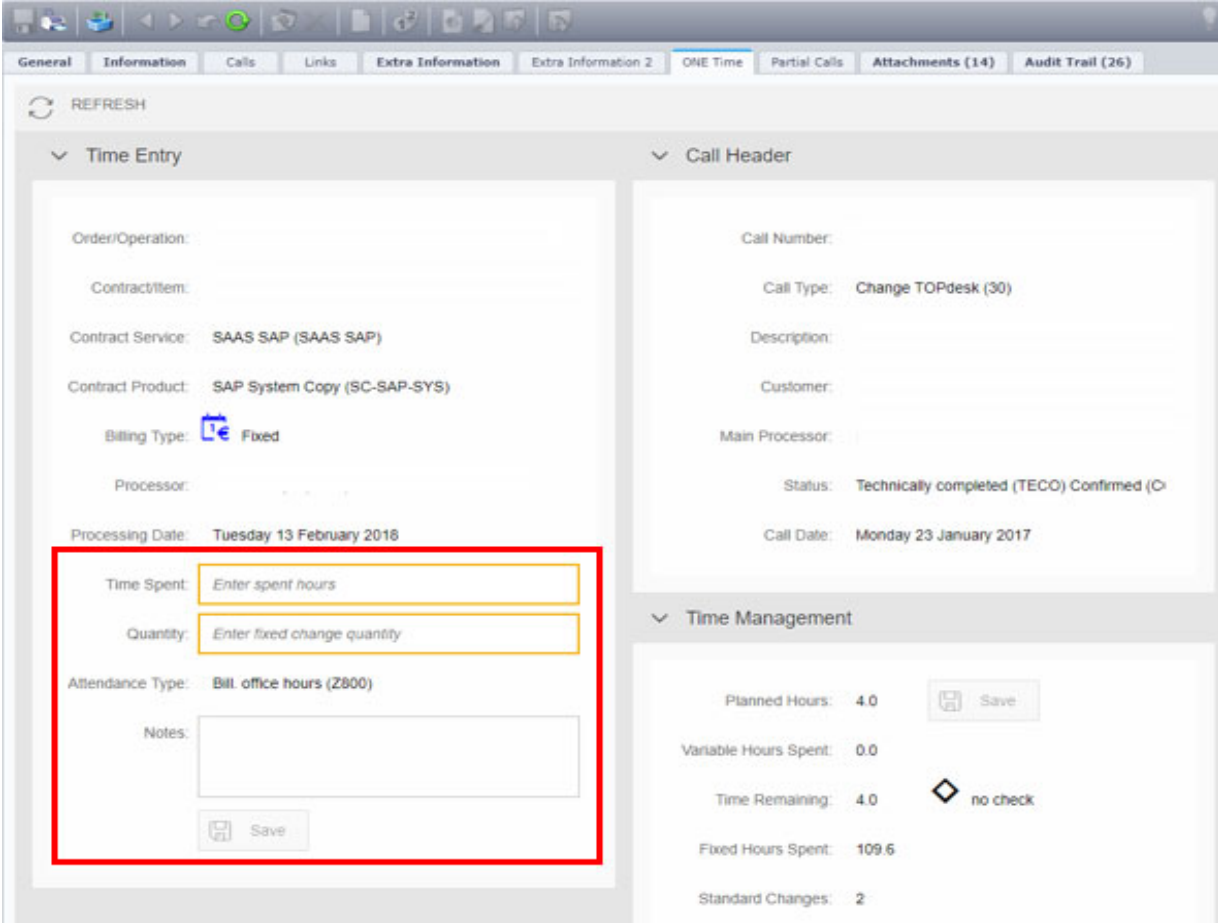
### 4.1.3 Standard change

These changes (often customer-specific) are very common and are registered on the basis of time & material. The hours worked are booked on the basis of both number and time & material. An example of a standard change is the execution of a transport (e.g. from QAS to PRD environment).

To keep a clear picture of the actual time needed, it is important to book the number of standard changes and the time spent on these reports in a timely manner.

For a standard change, the following fields must be filled in:

Field	Description	Comments
Time Spent	Number of hours spent.	
Quantity	Number of standard changes picked up via the relevant message (e.g.: "2" system copies) .	Fill this in once, or if the number of changes actually changes (i.e. not with every 'Time Spent' booking!)
Notes	Details of the work performed. This is optional and not mandatory.	



The screenshot shows the Topdesk software interface. The 'Time Entry' section is highlighted with a red box and contains the following fields:

- Order/Operation:
- Contract/Item:
- Contract Service: SAAS SAP (SAAS SAP)
- Contract Product: SAP System Copy (SC-SAP-SYS)
- Billing Type: Fixed
- Processor:
- Processing Date: Tuesday 13 February 2018
- Time Spent: Enter spent hours
- Quantity: Enter fixed change quantity
- Attendance Type: Bill office hours (Z800)
- Notes:
- Save button

The 'Call Header' section contains:

- Call Number:
- Call Type: Change TOPdesk (30)
- Description:
- Customer:
- Main Processor:
- Status: Technically completed (TECO) Confirmed (O)
- Call Date: Monday 23 January 2017

The 'Time Management' section contains:

- Planned Hours: 4.0
- Variable Hours Spent: 0.0
- Time Remaining: 4.0
- Fixed Hours Spent: 109.6
- Standard Changes: 2
- Save button
- no check button

Press Save after filling in the required fields.

#### 4.1.4 Overview

In both situations, Time Overview provides an overview of the hours already booked on the message.

Time Overview									
Date	Product/W...	Processor	Time Spent	Quantity	Attendanc...	Billing Type	Call Number	Created On	Created By
Thu 02 Mar 2017	SAP System Copy (SC-SAP-SYS)		0.5		Bill. office hours (Z800)	Fixed		Fri 03 Mar 2017	>
Fri 24 Feb 2017	SAP System Copy (SC-SAP-SYS)		4.0		Bill. office hours (Z800)	Fixed		Fri 24 Feb 2017	>
Thu 23 Feb 2017	SAP System Copy (SC-SAP-SYS)		4.0		Bill. office hours (Z800)	Fixed		Wed 01 Mar 2017	>

#### 4.1.5 Correcting / restoring a booking

Of course it can happen that the wrong number of hours is accidentally booked or a wrong date is chosen. This can be corrected by sending an email to [facturatie@ctac.nl](mailto:facturatie@ctac.nl). Here you should state the relevant message(s), the date, the number of hours, and what needs to be corrected.

#### 4.1.6 Important client information

Before you book any hours, always read the extra information that can be found under the Extra Information tab. Here, for example you can find information about communication with the customer, but also agreements on the naming of transports.