# Table of Contents

- Using the AskTom Knowledge Base ................................................................. 3
- Asking AskTom a Question ............................................................................. 7
- Creating a Knowledge Base Question From a Ticket .................................... 9
- Creating a New Answer .................................................................................. 12
- Creating a Customized View ......................................................................... 14
- Sorting and viewing The AskTom Articles ..................................................... 15
- Changing the owner of an Article ................................................................. 16
- Editing an AskTom Question ......................................................................... 17
- Using AskTom Chat ....................................................................................... 21
- Responding to an AskTom Chat ................................................................. 24
- Locating Help Resources ............................................................................... 26
- Service Desk Request ................................................................................... 26
- Important Links ............................................................................................. 26
Purpose

This training material highlights the new ticket system, and how to manage, create, and understand the AskTom knowledge base in BMC Remedyforce.

Audience

This training material is designed for University staff that will be utilizing the AskTom knowledge base in BMC Remedyforce.
Using the AskTom Knowledge Base

AskTom is now part of the BMC Remedyforce Self Service, a browser based incident management system that enables users to access the system from any computer or mobile device.

*Please note that different fields or sections in the system may require your browser to allow pop-ups from Remedyforce.*

1. Log into the System

- **Browse to:** [https://umhelpdesk.memphis.edu/](https://umhelpdesk.memphis.edu/)
- **Login with your UUID and password.** *(The UUID and password is the same one you use for myMemphis Portal and all other campus resources.)*
- **Once logged in, you will be taken to the self-service tab.**
2. Viewing AskTom Articles

Click on the View AskTom Articles tile located under the Home tab on the left portion of the screen.
3. (A) Next type your question in the text field located directly under the Home tab. (B) Once you have entered your question click on the search button to search the database for your question.

You can also search for an answer using the categories tree. Select the category you want to know more about. To the right of the category tree a list of AskTom articles will be displayed. Click on the article to view it.

4. Once you have clicked search the data base will retrieve any articles that may pertain to key words in your search.
5. At the bottom of the answer you can rate the article, enter comments or feedback and tell us whether the article met your need.
Asking AskTom a Question

To ask a new question, click on Common Service Requests. Located on the right side will be a list of common service requests and popular self-help articles.

1. Click on AskTom Question from the list in the window.

2. Type your question in the provided field. Select urgency, impact and add a screen shot attachment if you wish. When you have completed asking the question click submit.
Once you have submitted your question you will receive a message.

![Message](image)

If you want to continue editing the question, click **Leave This Page** if you are ready to finish and submit the question, click **Stay On This Page**. When the question is submitted, it will be added to a service desk ticket and emailed to you.
Creating a Knowledge Base Question From a Ticket

To create a knowledge base question from an existing ticket, do the following:

1. Open the ticket in Remedyforce Console

2. Select the Agent Tools tab and choose Create Knowledge Article from the drop down menu.

3. Name your knowledge article by typing the title in the blank text field. Click the Create button.
4. Once the new knowledge article is created it will be placed as a draft as an article in the AskTom Answers Tab. Select the question to edit. You can change the category, title, add or delete keywords, question, or the answer. Click Edit to edit the question. From here you will edit article information and details.

Article information will tell you who the owner of the question is, what category the question belongs, the status of the question (Draft, Published, or retired).

Article Details contain all of the information in the knowledge base article.

A. Title, B. Keywords, C. Question, D. Answer
A. **Title** displays the title of the article or the question the article will answer.
B. **Keywords** are words that describe, define, or closely linked to a particular subject. Keywords must be separated by semicolons.
C. **Question** contains the question in its entirety.
D. **Answer** provides the answer to the question with pertinent links.

5. Make the changes that you want to in any of these fields. When you have finished editing the question. Click **Save**
Creating a New Answer

To create a new AskTom public answer click on the AskTom Answers Tab. From here you can edit current questions or create a new question.

1. Click New AskTom Answer to create a new answer.

2. In the Article Information area choose a category for the answer by selecting the category view button to reveal the list of categories. Click on a category to select it.
3. Next choose a status for the question (Draft, Published or Retired). If you are publishing the article, be sure the Display in Self Service is checked.

4. Next enter the **Title, Keywords, Question, and Answer**.

   **Title** displays the title of the article or the question the article will answer.

   **Keywords** are words that describe, define, or closely linked to a particular subject. Keywords must be separated by semicolons.

   **Question** contains the question in its entirety.

   **Answer** provides the answer to the question with pertinent links.

5. The toolbar allows limited formatting in both the **Question** and **Answer** Areas. This is also where you can add a hyperlink or photo to them as well.

6. Once you have edited the question the way it should appear, save the changes.
Creating a Customized View

1. Click on Create New View

2. To customize your own personal view follow the steps below:
   
   A. Enter View Name. View Unique Name will automatically be created.
   
   B. Specify Filter Criteria. Filter by owner of all AskTom Answers or My AskTom Answers. Filter the fields that you want to appear in your AskTom window. Here you will also Add Filter Logic.
   
   C. Select Fields to Display. Choose the fields to display by adding and removing them from Available Fields to Selected Fields. These fields will be the columns in the new view. Organize the order using the up, down, top and bottom buttons.
   
   D. Click the Save Button to save your changes.
Sorting and viewing The AskTom Articles

AskTom records can be sorted by Article ID, Record Type, Category, Title, Status, Published Date, or Last Modified Date.

There are a few different ways to organize and sort the records. The quickest and easiest method is to sort the articles by the column header. The two most commonly sorted columns are **Title** and **Category**.

To sort articles by column header:

1. Select the view from the drop down menu (All, Draft and In-Review or Published Articles). Click Go.

2. Choose the Column you want to sort by selecting the column header. When the column is selected it will have an arrow **↑** beside the name.

3. Once you have selected the column, you can view in alphabetical order by selecting the hyper linked letter of the alphabet located directly above and to the right of the columns.
Changing the owner of an Article

If you find that an article has not been assigned correctly, you can change the owner and assign it to the correct area.

1. To change owner of the article, select the article that you want to change the owner for then click on the Change Owner button.

2. (A) Look up the user name by clicking on the search icon. This will look up the identity of the user in the Remedyforce system. (B) You can also choose to send an email notification by selecting Send Notification Email. (C) once you have made the change click Save, to save the changes and re-assign the owner.
AskTom

**Editing an AskTom Question**

To edit an AskTom question click on the *AskTom Answers Tab*. From here you can edit current questions or create a new question.

*Any time you see a red bar located beside any item within the knowledge base. This means it is required to continue.*

1. Click on the *AskTom Answers Tab* located at the top of the menu.
2. Once you have selected the AskTom Answers tab you can choose to edit Draft and In-Review Articles, Published Articles, or Retired Articles.

Draft and In-Review Articles contain knowledge base articles that are in the process of being created or that are under review. Articles under Draft, In-Review, and Retired are not visible to anyone but AskTom administrators. Published articles contain all of the currently active and visible knowledge-based items.

3. Once you have chosen the type article you want to edit (Published, Draft and In-Review, or Retired). Select the question you would like to amend. Click Edit, to edit the question or Delete to delete it entirely.

4. Once you have selected the question you can edit and change the category, title, add or delete keywords, question, or the answer.
Article information will tell you who the owner of the question is, what category the question belongs, the status of the question (Draft, Published, or retired).

Article Details contain all of the information in the knowledge base article.

A. **Title** displays the title of the article or the question the article will answer.
B. **Keywords** are words closely linked to, that describe or define, a particular subject, or words or phrases employed in narrowing down a database search. Keywords must be separated by semicolons.
C. **Question** contains the question in it's entirety.
D. **Answer** provides the answer to the question with pertinent links.

Make the changes that you want to in any of these fields.
The toolbar allows limited formatting in both the **Question** and **Answer** Areas. This is also where you can add a hyperlink or photo to them as well.

Additional information provides a history of the ticket including the published date, review date, retired date and the number of time the question was viewed in the system.

Once you have edited the question, click **Save** the changes.
Using AskTom Chat

To begin using chat, click on the AskTom Chat tab located at the bottom right corner of the window.

Next you will see the chat window. Type your question or describe your issue in the text field then click **Start Chat** to begin chat session.
If no one is available to chat at the moment you will receive this message:

Once you have started the chat session the next window to appear will be a response from a Service Desk representative. If you would like to attach a screen shot of your technical issue, you may do so by clicking on the paperclip icon located at the bottom right hand of the chat window.
AskTom
Once you are satisfied that the chat session is complete, close the chat window by clicking on the x in the upper right hand corner of the chat window. When you close the window you will get the following window.

![Close dialog box](image)

If you want to continue with the chat, click No if you are ready to finish and complete the chat, click Yes. When the chat session closes, your chat transcript will be added to a service desk ticket and emailed to you.
Responding to an AskTom Chat

Only certain users will have the ability to answer questions via AskTom Chat.

1. Log into Remedyforce.

2. Choose the Remedyforce Console tab. By default, you should see the Available tab at the lower right hand side of the window.

3. Your tab will automatically change color to red and read busy when a new question is entered and is directed to you.
4. Once you have answered the chat question and the client is satisfied, you are now ready to close the chat session. Once the session has ended, close chat session. Click on the X in the upper right hand corner of chat window.

5. When you close the chat to end the session you will be prompted to enter a new incident or add to existing incident.

6. Click New Incident this will bring up all the information from the chat session into a new ticket. Enter the Urgency, Status, Impact then click Save to close the ticket. You can also add to an existing incident, then click Save to close the ticket.
Locating Help Resources

The Center for Teaching and Learning offers support to faculty, staff and students. Upon completing the training covered in this course; faculty, staff and students are able to receive additional training help and resources. Such help can be located as follow:

Service Desk Request

Submitting a Ticket

- Login URL:
  - https://umhelpdesk.memphis.edu
  - After logging in, choose the link Request Help or Services.
  - Choose Request Help or Services.

Call the ITS Service Desk (901-678-8888) on a 24x7 basis

- Call the Service Desk for immediate assistance with login problems or issues with using the Service Desk Request Form.

- If you do not receive a response from via the Service Desk Request Form after 24 hours, email The Center for Teaching and Learning, umtech@memphis.edu (please provide your Service Desk ticket number for faster assistance).

Important Links

- umTech – memphis.edu/umtech/
- Center for Teaching and Learning (CTL) - memphis.edu/umtech/ctl/