WELCOME

UVAHS REMEDY INCIDENT MANAGEMENT
Logging In and Navigating in ITSM

- Logging In and out of the System
- Roles, Responsibilities and Permissions
- Navigating in ITSM

Additional Modules:

- Introduction
- Logging In and Navigating in ITSM
- Using My HIT Self-Service Overview
- Using the Consoles
- Intro to working with Incidents
- Creating New Incidents
- Updating and Resolving Incidents
- Summary
Demonstration: Logging In
LAB: Use this URL: ITSM Test system: http://servicetst

Note: Later we’ll look at MyIT Test System: http://hstsitsmyitt1/ux/myitapp/

Enter your Corporate ID and network password

Press the Log In button when ready or press the Enter key on the Keyboard.
Logout of the System

As a habit and security reasons, you should always log out of the BMC Remedy system when you are no longer using it.

**LAB for Later:** On the IT Home Page, press the *Logout* button located in the top, right-hand corner of the console.
Additional Reference Material

The following pages are provided for your reference after class.

During the class we will spend the rest of the time in the system.
Incident Management v9.x
User Training Class

Incident Management Roles, Responsibilities & Permissions
Review Roles and Responsibilities

- It is important to understand the different roles and responsibilities associated to BMC Software’s Incident Management application.
- Incident Management requires specific permissions and functionality role capabilities in order to work within the applications.

- **Based on Permissions**
  - Group Permissions
  - User Permissions

- **Based on Functional Roles**
  - GroupRoles
Every **UVAHS** Support Staff member within the Incident Application requires at least one Support Group Membership.

1) Incidents are “always” assigned to a Support Group.

2) Any member of the Support Group with the right user permissions can view the requests & assign Incident to an individual &/or different Support Group.

3) Any member of the Support Group with the right user permissions can work on the requests.

4) Any member of the Support Group with the right user permissions and settings can be notified of new or modified requests.
Example of Group Permissions

- **Service Desk Employee:**
  - John Smith is primarily responsible for documenting customer calls into Incident Management.
  - John Smith records customer status update requests to existing calls.
  - John Smith belongs to the Service Desk Support Group.
  - The Service Desk Support Group is defaulted as the Incident Owner of the request.
    - Any member of the Service Desk Support Group with the right user permissions can modify the request, whether it is assigned to John or not.
User permissions are based on the role of the individual within Service Desk Management Applications.

Types of User permissions:

1. **Incident Viewer** – User is only allowed to view the request – cannot submit or modify a request.

2. **Incident Submitter** – User is allowed to view and submit requests – cannot modify a request except for requests they submitted.

3. **Incident User** – User is allowed to view, submit and modify requests. **UVAHS** members will have this permission.

4. **Incident Master** – User is allowed to view, submit and modify requests and have special privileges within the applications. **UVAHS** Managers will have this permission.

5. **Incident Config** – User is allowed to support application configuration requirements as an acting administrator.
Examples of Incident Roles

Requester; Incident Viewer; or Incident Submitter

Incident Owner – Usually the Service Desk Group (for visibility) or a Manager

Incident Assignee
Review the Different Incident Roles

Incident Master

Vendor

Task Implementer

Incident Config
Service Desk Management is made up of two applications – Incident and Problem Management applications. UVAHS will only be using Incident Management at this time.

For a Support Staff members to be able to work on any incident, they require the right support group permissions and user rights.

We move on to navigating within the ITSM Application.
Demonstration: Navigating to Incident
Incident Management v9.x
User Training Class

Navigating within Remedy ITSM
Logging into Remedy ITSM System

Enter in your Network User ID and password. Click the Log In button, or press the Enter key on the Keyboard. *The Authentication field is not required, so leave blank.
Login to Remedy ITSM

- If you enter your user name or password incorrectly, you’ll receive an error.
- If you’re unable to log in, check with your administrator.
- After you log in, you’ll be taken to your Home Page.
IT Home Page is the Out-of-the-Box default entry point to Remedy. A list of open tickets assigned to the logged-In User based on a value settings within the Show and Company fields.

At UVAHS, most people are setup to go to the Overview Console. This is good if you work on multiple ticket types. However if you can set your Home Page to the Incident Management console if you prefer.
The IT Home Page is mostly for Managers and Supervisors. This section is for Reference ONLY if you use the IT Home Page.

If the IT Home Page is set as your default, it displays a mini view of the Overview Console by default. You can add to that to display up to four (4) panels within the IT Home Page.
The IT Home Page allows up to four panels to be displayed to view tickets from a specific application (Incident Console; Change Console; etc.) or run a report within the Flashboard product.

The buttons located in the top, right-hand corner of the form allows the End User to expand the windows, save the windows, or return to the default option.
The initial Overview Console panel is minimized and 3 additional panels display.

If you only one two panels to show up, select the X button located in the top, right-hand corner of each panel to remove. If you remove the bottom panel, the top panel will expand in size.
To have a report or other application display, select the **Show** drop down menu option and then the desired application. Here we selected the Incident Management Application and then selected the option to view **All Open Incidents** that the logged in user (you) has permissions to see.
Expanding the Panels

The end result of the All Open Incidents option creates a Flashboard report that displays a pie chart of the open requests based on Status values.

Select the desired color of the pie chart and a second window will open displaying the specific records that are associated to the value selected.
Logging Out of the System

Best Practice – Select **Logout** button.

Shutting down browser will release user from the system within five minutes.
Incident Management is part of the Action Request System and IT Service Management (ITSM) Application.

Accessing Incident Management requires a user first log into the Remedy ITSM System.

Once logged in, the Overview Console is set as a default as your Home Page.

Use the Application Menu on the left side to do the following:

- Access any of the Consoles you have permission to see such as the Incident Management Console;
- Create records such as Incidents or Change Requests;
- Search records such as Incidents or Change Requests; and
- Access Flashboard Reports associated to records such as Incidents or Change Requests.
1. Launch the Internet Explorer browser Client.
2. Select the **Tools > Internet Options** from the Task bar of the browser.
3. Select the Settings button from within the **General > Tabs** section.
4. In the **When a pop-up is encountered** section, check the **Always open pop-ups in a new tab** option.
5. Select the **OK** Button to save the option.
6. Select the **OK** button to close the Internet Options window.
7. In the address field, type in [http://servicetst](http://servicetst) URL, followed by pressing the **Enter** key on the keyboard.
8. In the Login screen fields, enter in your **network** Username and Password into the respective fields to log into the system.
9. The **IT Home Page** should appear.
10. We are going to practice logging out of the system – so select the **Logout** URL located in the top, right-hand corner of the IT Home Page.
This concludes the module on how to navigate in Remedy ITSM. Next, we’ll move on to learning about how to use My HIT Self-Service.

Let’s Continue!