



WELCOME

UVAHS REMEDY

INCIDENT MANAGEMENT



❑ Using the Consoles

- ❖ [Using the ITSM Consoles](#)

Additional Modules:

- ❖ Introduction
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- ❖ Updating and Resolving Incidents
- ❖ Summary

Demonstration: Using the Consoles



Incident Management v9.x User Training Class

Using the ITSM Consoles

Display View Section

Overview Console ↻

icast Show Assigned To All My Groups Company []

Console List

Create View Print Service Context Search For Ticket

Showing 1 - 113 of 113 Preferences ▾

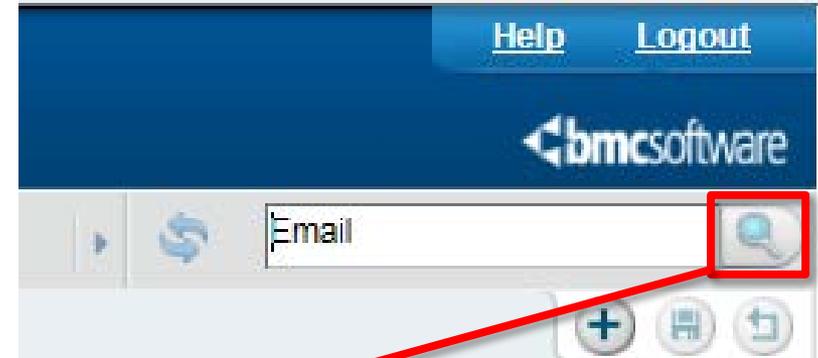
Request ID ↑	Parent Request ID	Request Type	Summary	Service	Status	Priority	Assignee Group	Assignee
AOT000000000001	ACME Laptop 0001	CI Unavailability	HR Network Down		Assigned	Medium	Frontoffice Sup	Allen Allbroo
CRQ_CAL_1000004		Change	Process new employee with necessa		Request For Authorization	Low	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000006		Change	Backup laptop prior to restaging back		Request For Change	High	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000008		Change	Backup server prior to migration.		Request For Change	High	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000010		Change	Backup system with external media.		Request For Authorization	Critical	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000012		Change	Replace remote connectivity applicati		Request For Change	High	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000015		Change	Change monitor on computer system.		Request For Change	High	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000020		Change	Swap I/O device hardware.		Request For Authorization	High	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000021		Change	Update I/O device software.		Request For Authorization	High	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000023		Change	Change network hardware on file ser		Request For Change	Critical	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000024		Change	Change networking software version		Request For Authorization	Medium	Frontoffice Sup	Ian Plyment
CRQ_CAL_1000025		Change	Update wireless access points to a n		Request For Change	Critical	Frontoffice Sup	Ian Plyment

Welcome section consists of:

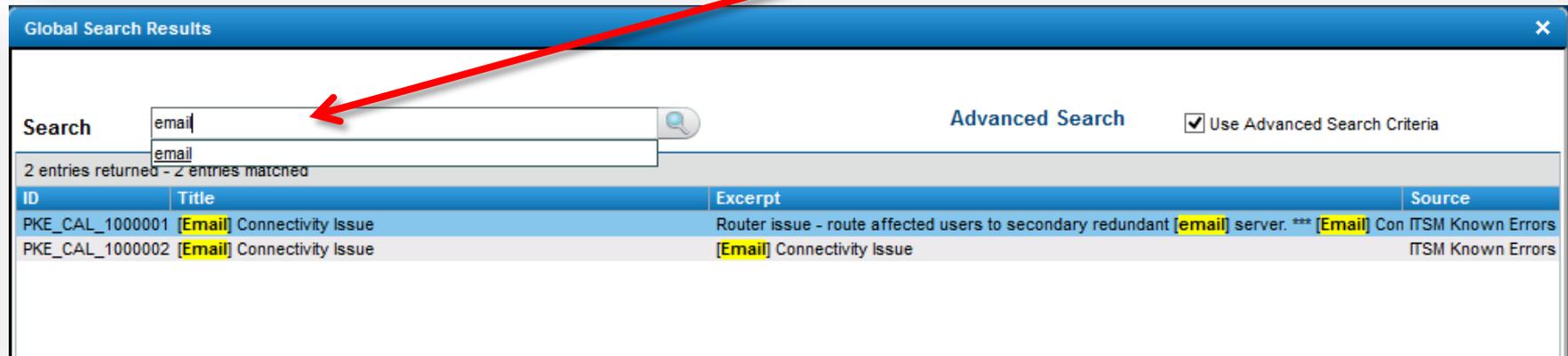
- ❖ Welcome title and logged in user name
- ❖ Help Option
- ❖ Logout option
- ❖ Refresh
- ❖ Global Search



❑ Global Search is located at the upper left-hand corner of the console.



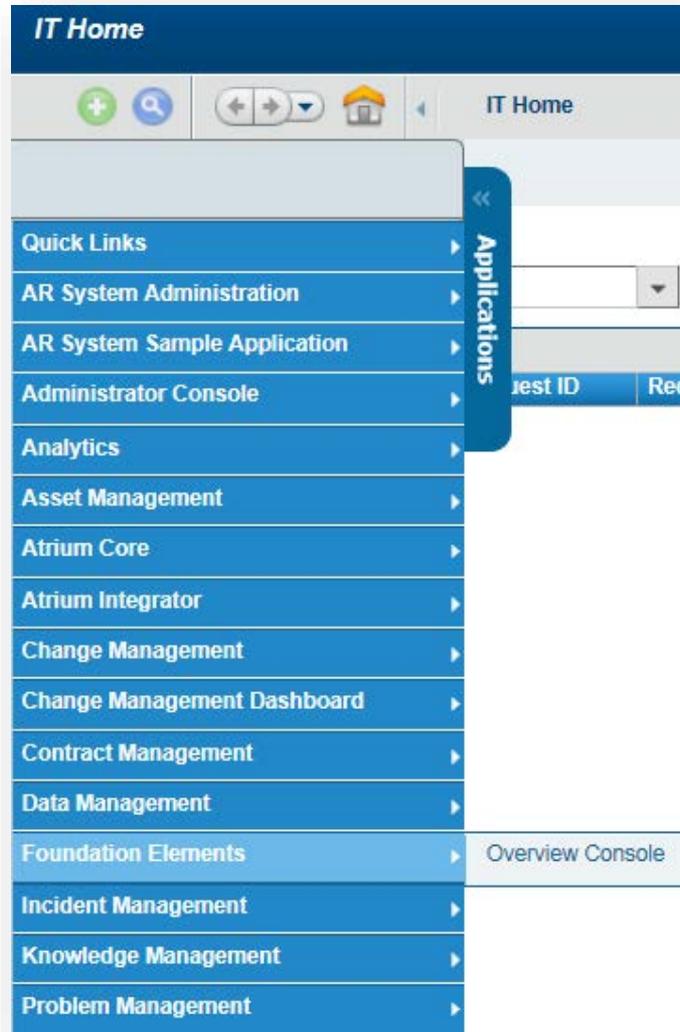
❑ Results will display from all applications that you have permission to access.



The image shows a 'Global Search Results' window. At the top, there is a search bar with 'email' entered and a search icon. Below the search bar, it says '2 entries returned - 2 entries matched'. To the right, there are options for 'Advanced Search' and a checked box for 'Use Advanced Search Criteria'. Below this is a table with search results.

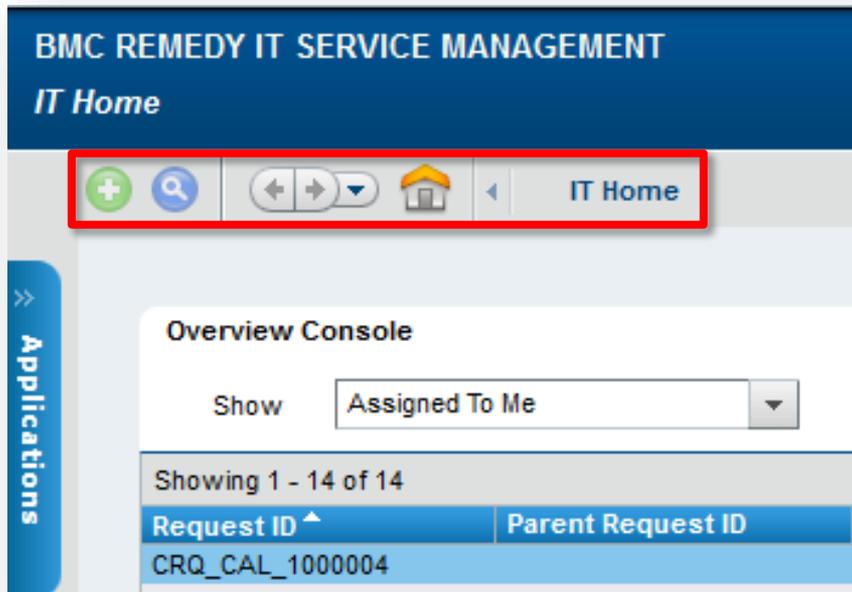
ID	Title	Excerpt	Source
PKE_CAL_1000001	[Email] Connectivity Issue	Router issue - route affected users to secondary redundant [email] server. *** [Email] Con ITSM Known Errors	ITSM Known Errors
PKE_CAL_1000002	[Email] Connectivity Issue	[Email] Connectivity Issue	ITSM Known Errors

Applications Fly-Out Menu



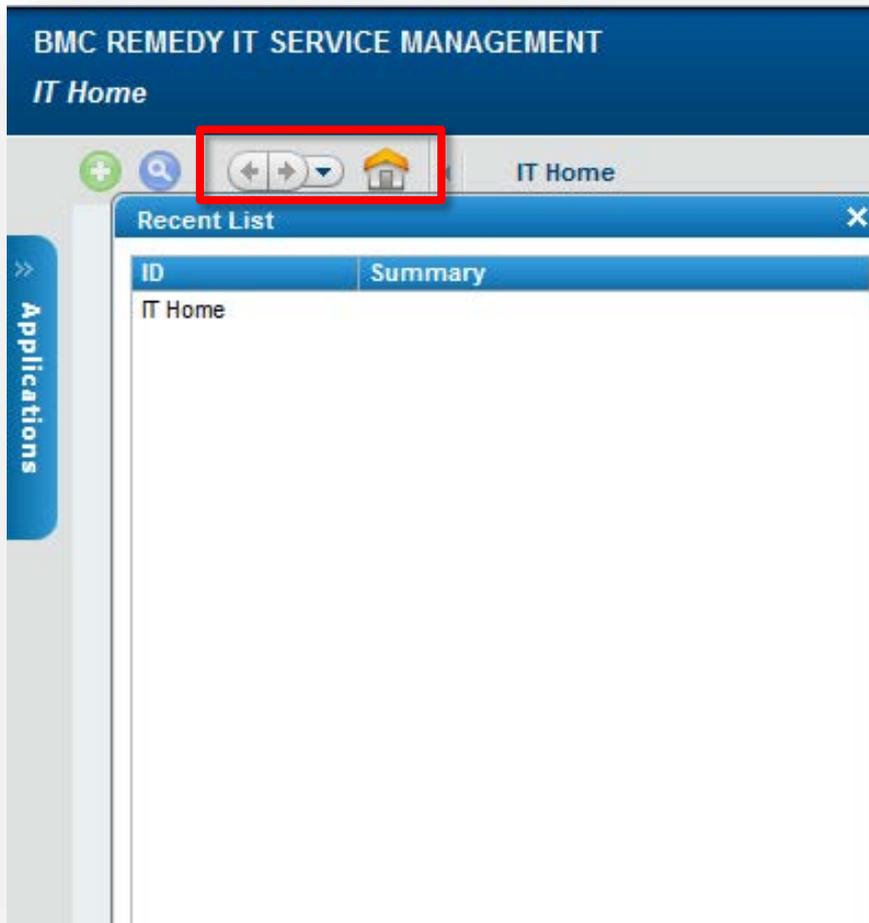
The Application Fly-Out Menu displays all applications the logged in user has permissions to access directly.

From here, select Foundation Elements > Overview Console option OR Incident Management > Incident Console



The “Breadcrumb” options allows the user to:

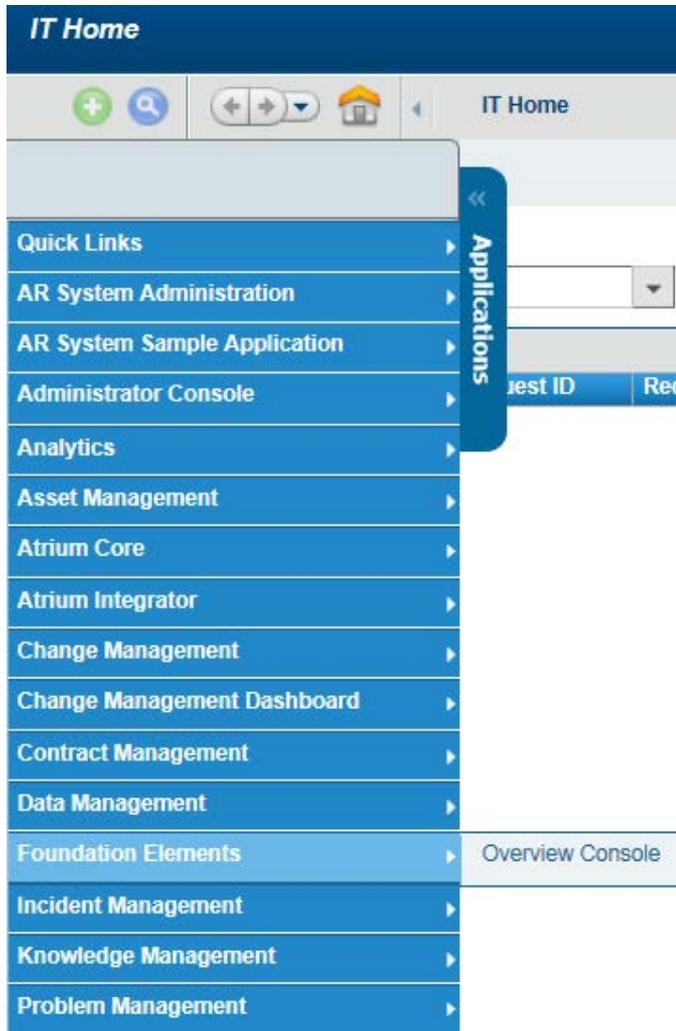
1. Switch the form from New to Search by selecting the Green or Blue buttons.
2. Navigate back and forth between forms.
3. View open forms through the drop-down arrow option.
4. Return to the IT Home Page with the selection of the Home icon.



The Home Page available options are:

1. House button – Returns the user to the primary home page that is set up within the Application Preference settings.
2. Arrows button – Provides a means to travel back and forth between forms that are currently opened.

Changing the Preference Settings

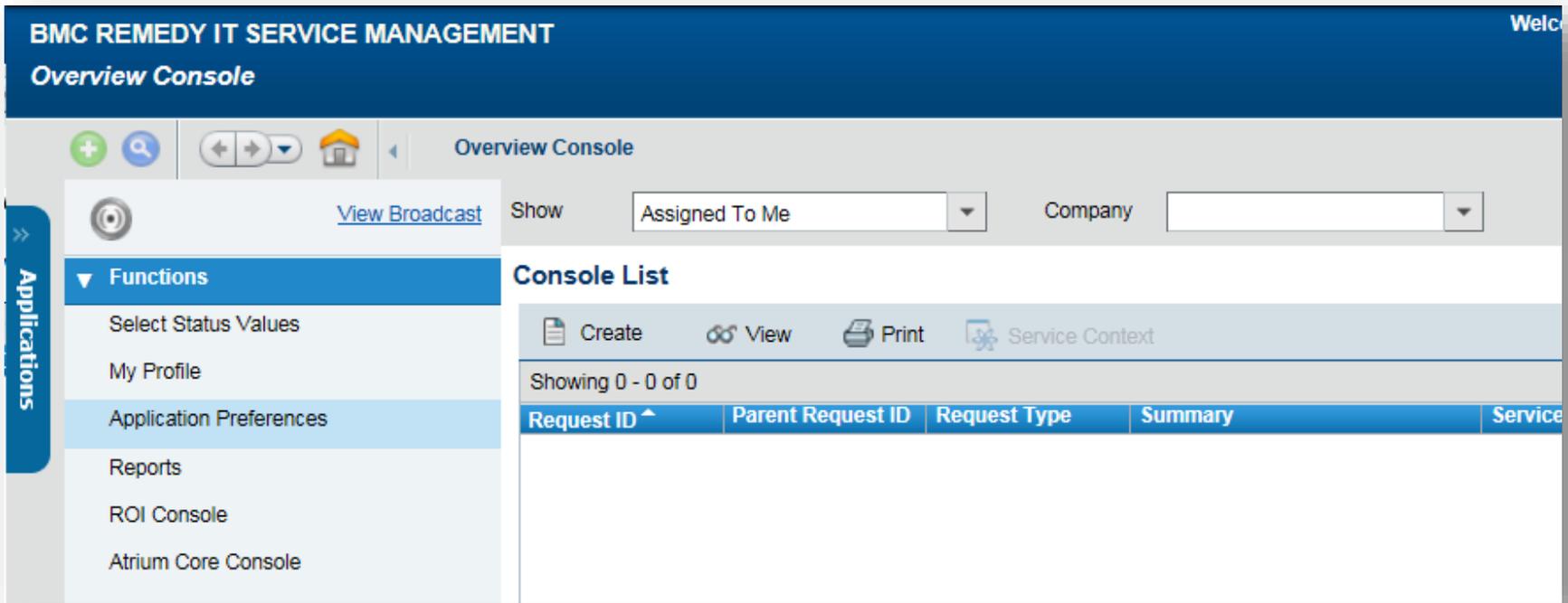


To change how the IT Home Page acts when the user initially logs in, for instance to open up the Incident Console instead of the IT Home Page, is done through the Application Preference form.

The Applications Preferences form is accessible from the main Consoles.

The Application Preference form can be accessed from any of the major ITSM Applications and from the Overview Console. From here, open the **Applications** menu, then select **Foundation Elements > Overview Console** or the **Incident Management > Incident Console**.

Overview Console Form

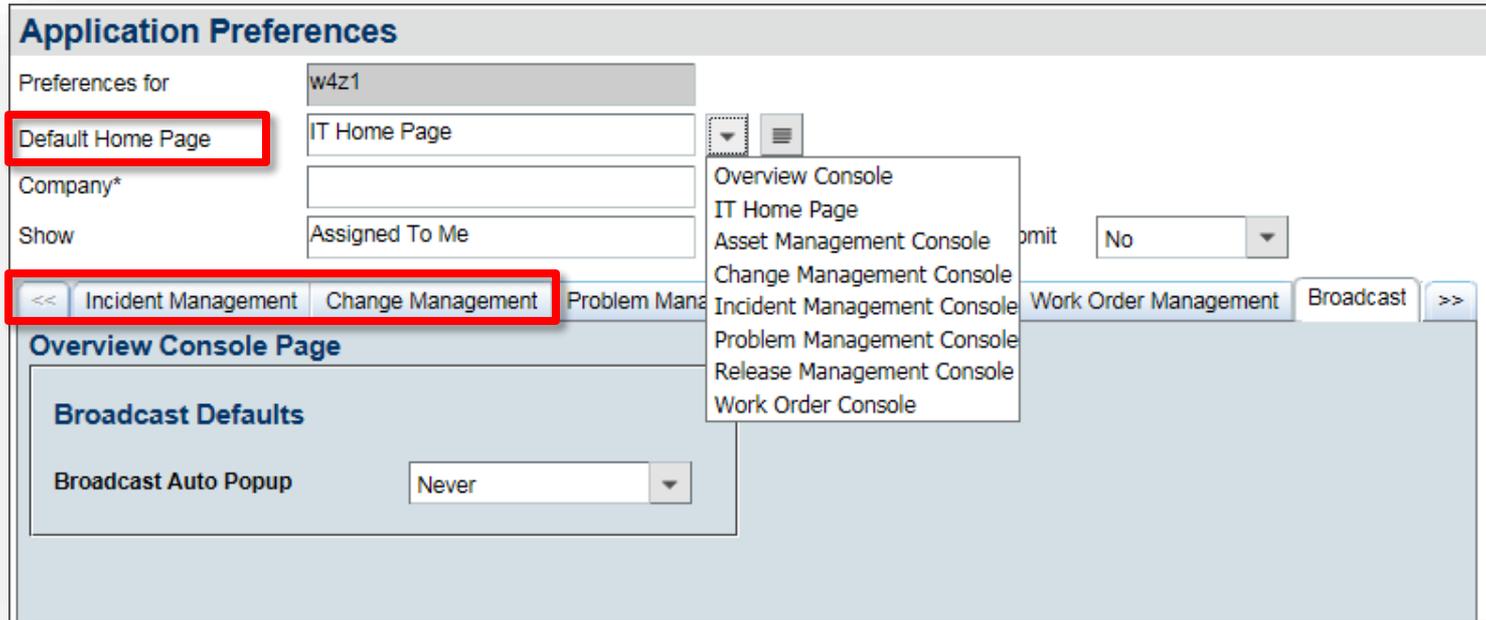


The screenshot shows the BMC Remedy IT Service Management Overview Console. The header includes the title "BMC REMEDY IT SERVICE MANAGEMENT" and "Overview Console". Below the header is a navigation bar with a search icon, navigation arrows, and a home icon. The main content area is divided into a left sidebar and a main panel. The sidebar, labeled "Applications", contains a "Functions" menu with options: "Select Status Values", "My Profile", "Application Preferences", "Reports", "ROI Console", and "Atrium Core Console". The main panel has a "View Broadcast" link, a "Show" dropdown menu set to "Assigned To Me", and a "Company" dropdown menu. Below this is a "Console List" section with action buttons for "Create", "View", "Print", and "Service Context". It indicates "Showing 0 - 0 of 0" records. A table header is visible with columns: "Request ID", "Parent Request ID", "Request Type", "Summary", and "Service".

The Overview Console provides you with the option of searching for records and updating your application preferences. If you're only using one application such as Incident Management, you probably won't use the Overview console but these functions work the same in all Consoles.

To modify your Application Preferences, under **Functions** click on **Application Preferences**.

Updating the Preference Profile



The screenshot shows the 'Application Preferences' window for user 'w4z1'. The 'Default Home Page' field is highlighted with a red box and has a dropdown menu open. The dropdown menu lists the following options: Overview Console, IT Home Page, Asset Management Console, Change Management Console, Incident Management Console, Problem Management Console, Release Management Console, and Work Order Console. Below the dropdown, the 'Incident Management' and 'Change Management' tabs are also highlighted with a red box. The 'Overview Console Page' section is visible below, showing 'Broadcast Defaults' with 'Broadcast Auto Popup' set to 'Never'.

In the Applications Preferences window you can set your **Default Home Page** by using the drop down menu. Once you've made your selection and clicked the **Save** button, you need to log out of the system in order for the change to take place.

Select the application tabs in the center of the window to change preferences for the applications to which you have permission.

Updating the Preference Profile

Application Preferences

Preferences for:

Default Home Page: [v] [≡]

Company*:

Show: [v] [≡] Confirm On Submit: [v]

<< **Incident Management** Change Management Problem Management Asset Management Work Order Management Broadcast >>

Overview Console Page

On Form Open

Data Set Name: [v]

Role: [v]

Overview Console

Show Incidents: [v]

Incident Status: [v]

SLM Status:

Role: [v]

Form

After New Save: [v]

Enable Auto-Decision Tree: [v]

Tab Views: [v]

Show Vendor: [v]

Show Financials: [v]

Show Date System: [v]

1. Select the **Return to home page** URL.
2. The **Username** and **Password** login page appears. Enter in your assigned information and then press the **Login** button.
3. Select the **Application Fly-Out** menu to view your list of direct access applications.
4. Select the **Incident Management Console** link located along the left side of the form.
5. Select an Incident to view in detail.
6. The **Incident Request** form should display the incident information.
7. Return to the **IT Home Page** by selecting the **House** button located along the top, left hand corner of the Incident Request form.
8. You should now be back at the **IT Home Page**.
9. In the top, left hand corner of the **IT Home Page**, select the drop-down menu option located to the left of the **House** button.

10. This dialog box should show the list of forms that you currently have open, to include any tickets that you have opened but did not close the form.
11. Close the dialog box by selecting the **X** option located in the top, right-hand corner of the dialog.
12. In the middle of the **IT Home Page** form, you will find a single **Console List** window that holds the **Overview Console** table field display option.
13. You can change the list of requests that display by changing the **Show** field option.
14. Change the **Show** option to **Assigned to All My Groups**. This will automatically refresh the table field and display all requests assigned to the groups that you are associated.

15. Locate the **Global Search** field – which can be found below the **Logout** and **Close** URL links (top, right of the console form) – and type in the word, **Issue**, followed by pressing the **Enter** key on your keyboard.
16. You should have the **Basic Search** window displayed for the Global Search.
17. Launch the Overview Console from the **Applications Fly-Out** menu. Select **Foundation Elements** then **Overview Console**.
18. Select the **Application Preference** from the left menu.
19. Change your **Default Home Page** to the **Overview Console** and click **Save**.
20. Select the **Incident Management** tab.
21. In the **After New Save** field, select **Modify Request After Submit** and click **Save**.
22. **Logout**.

Logging into the Remedy ITSM System and navigating within the IT Home Page can make it easier for any User to submit, modify or search for specific records related to their current roles.

It is now time to work with the Incident Management Application.

This concludes the module on how to use the Remedy ITSM Consoles. Next, we'll move on to an introduction in how to work with Incident records.

Let's Continue!