WELCOME

UVAHS REMEDY

INCIDENT MANAGEMENT
Course Material Index

- Using the Consoles
  - Using the ITSM Consoles

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: Using the Consoles
Incident Management v9.x
User Training Class

Using the ITSM Consoles
### Display View Section

**Overview Console**

- Show: Assigned To All My Groups
- Company: 

**Console List**

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Parent Request ID</th>
<th>Request Type</th>
<th>Summary</th>
<th>Service</th>
<th>Status</th>
<th>Priority</th>
<th>Assignee</th>
<th>Assignee Group</th>
</tr>
</thead>
</table>
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 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.
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**.
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: appadmin
- Default Home Page: IT Home Page
- Show: Assigned To All My Groups
- Confirm On Submit: No

Incident Management
- Overview Console Page
  - On Form Open
    - Data Set Name: BMC Asset
    - Role: All
  - Form
    - After New Save
      - Modify Request After Submit
    - Enable Auto-Decision Tree
    - Tab Views
      - Show Vendor: Yes
      - Show Financials: Yes
      - Show Date System: Yes

Overview Console
- Show Incidents: Yes
- Incident Status: All Incidents
- SLM Status: Assigned Group
- Role: Assigned Group

Save Close
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.
You Try It

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!