WELCOME

UVAHS REMEDY

INCIDENT MANAGEMENT
• Creating New Incidents
  – Access Incident Management
  – The Incident Request Form
  – Add & Validate Customer Info
  – View Customers Open Incidents
  – Document the Incident Info
  – Classify the Incident
  – Service, CI Fields & the Asset Tab
  – Target Date, Type, Impact, Urgency & Priority
  – Reported Source & Categorizations
  – Assigning Incidents
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  – Creating New Incidents
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  – Summary
Demonstration: Using Incident Mgmt.
Access the system through the Internet Browser.

Type the appropriate AR System URL into the address field of the browser. For training purposes, use the UVAHS validation environment:

- http://servicetst
- The following login screen will appear.
The Incident form will generally be accessed through the Application menu as shown here. Other options include:

- **Overview Console:**
  - Create button option

- **Incident Management Console**
  - Create button
  - Functions > New Incident

- **Other ITSM Forms**
  - Create Related Request

- **Incident Form**
  - Green button while in search or modify mode
  - New Request while in modify mode
Best Practice View for the Incident Form

- Process Flow Path is set to Identification and Recording stage.
Validating the Customer and Contact.

The **Customer**’s field is defaulted to search by **Corporate ID**. When typing in the person’s Corporate ID, you should see a list of options appear below the value box.
By typing in the Corporate ID letters and numbers into the **Customer**+ field, a list of profiles will begin to appear below the Customer+ value box.

A selection list appear as you type the person’s corporate ID. Select the customer from the list, and the Customer and Company field will populate.
If you need to validate the person, you can challenge him or her about their information by hovering the cursor on the Customer*+'s value box. This will bring up the person's profile information.

From here you can confirm their address, phone number or other information.
By pressing the **Edit Customer Location Details** that is located to the right of the Customer Site field will display the Site Details associated to the customer.

From here, you can enter additional locational information, however, the **Site Details** on this screen are **NOT** the details sent to the tech in their email/text message. We have our own fields that we use at UVAHS.

After adding info, press the **OK** button.
Press the toggle to the right of the Customer Phone** field to return to the Incident ID, Company, Customer and Contact name information.
If you need to use different fields to search for the Customer’s information, then place the cursor inside **Customer***++ field without typing in anything, then press the **Enter** key on your keyboard. Alternatively you can select the **magnifying glass** button that is located to the right of the value box.
The **People Search** Dialog box appears based on the information provided in the Company and Customer*+ fields.

The number of returned values appears above the table field.

From here, you can use any of the Search fields to locate the customer’s information.
Enter in criteria, for example ABT Associates Inc. in the **company** field.

Click the **Search** button located above the table results field. Your new results will display in the table.
Quick Check on Customer’s Open Incidents

If a customer calls in with a request to an existing ticket, or to verify this is NOT a new request, in the Quick Action section on the right side of the form click Customer’s Incidents.

If the customer had any open requests, then a number would appear on top of the image. If nothing is there, then the customer does not have any open Incidents at this time.
When the customer is on the phone calling in the request, provide the **Incident ID** number (ie: INC2297) to the customer after the customer has been validated.

This is in case you lose contact with the customer during the recording process.
Document the Caller’s Request

Identify why the customer is requesting service by completing the **Summary** and **Notes** fields.

The **Summary** field is bold, and therefore required, with a 100 character limit. The **Notes** field is not required, but has no size limit. You can copy and paste into the notes field.
What to Classify in the Incident Request?

**Incident Fields**
- Target Date
- Impact and Urgency = Priority
- Incident Type
- Reported Source
- Operational Categorizations
- Product Categorizations
The **Service** field is used to show the type of business or technical service that the request is classified under (i.e.: Printer Issue would be associated to Hardware Service Support. At UVAHS, the **Service** field is **NOT** used right now.

Additionally, the **CI** field is **NOT** used in Incident as described in the BMC documentation at UVAHS at this time. Instead a customization is used, which your instructor will demonstrate.

Do not use the **Service** field or the **CI** field menus.
Asset/Support Details Tab
The **Target Date** field represents the desired resolution of the request as requested by the customer. This field can be left blank.
**Impact** represents the technician’s impact assessment of the request to the company, organization, department or group of people/individuals.
Urgency represents the customer’s view of the impact assessment of the request.
Priority will be automatically calculated by the system based on a weight calculation between the Impact and Urgency field values.
Incident Type Classification

Incident Type represents the type of service being requested. For failures or issues, User Service Restoration. For other requests, User Service Request.
Reported Source field represents how you took the call from the customer or contact.

If this field is set to Email, the Response field will show at the bottom.
Operational and Product Categorizations

- **Operational Categorization** – Identifies the type of service to be performed.

- **Product Categorization** – Identifies the product that the service is being performed against.
Categorization Options

Operational Categorization – Identifies the type of service to be performed. (What is being requested)

Product Categorization – Identifies the product that the service is being performed against.

Both categorizations are required by UVAHS and used to:

- Assign the request to specific support groups;
- Metric analysis;
- Service Level Agreement processing;
- Quick reference guide; and
- Quick search options.
One of the things that is important to UVAHS is that you fill in ALL of the categorization fields.

Operational Categorizations are required for UVAHS but UVAHS also wants to have the Product Categorizations filled in.
Operational Categorization defines what is being requested.

Product Categorization Identifies the product that the Request or Issue is related to.

At UVAHS you must fill in all of the Incident Operational Categorizations.
Options to set the Operational and Product Categorizations
Selecting Operational Categorization Values

Tier 1, 2 & 3 Operational Categorization are **REQUIRED**.

The list of Operational Categorization options that appear are based on the **Company (location)** field.

At **UVAHS** operational categorizations are **Required**.
Product Categorization are NOT REQUIRED.

In the Product Name+ field, you can type in a keyword search to look for a specific product – as in Microsoft – and see all options display once you press the Enter key.
A list of product options appears in a Product Selection dialog display. If the product is displayed, highlight it and then press the Select button. The Product categorizations will be filled in.
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Incident Management Assignment Process
Incident Assignment Process

Incident Assignment Options:

1. **Incident Assignee**
   - Assign to Me option
   - Auto Assign option
   - Search option (Internet Only)

2. **Incident Owner**
   - Located on Date/System tab
   - Defaults to Call Taker’s default assigned group.
Incident Assignee

- Determines the work around or fix for the request.
- Determines the overall impact of the request.
- Communicates with the Customer on an “as needed” basis.
- Records the performance history of the request.
- Can give the request to another Support Group.

- Incident Owner can reassign the request to another Support Group.
Assign to Me displays a Select My Group window if the End User is assigned to more than one Support Group.

You can leave the Assignee field empty, or you can select someone from the selected support group manually.
Auto Assign uses the system configuration assignment process to automatically provide the best assignment option. **We are not currently using this at UVAHS.**
The **Assigned Group** field provides a searchable option when the End User begins typing into the field.

Some groups prefer that you leave the Assignee field blank and allow the assigned group to decide who will work on the request. Others are fine with you selecting an Assignee.
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Incident Management Status
The Status of the Incident depends on the actions taken by the Assignee.

1) **Assigned** - if the Incident is assigned to a Support Group, but not an individual.

2) **In Progress** if the Incident is assigned to a person who is working on it but it is not resolved.

3) **Resolved** if the Incident is being resolved on First Call Contact.

4) **Closed** should not be selected on a create situation.

5) **Cancelled** if the customer no longer needs the service during the call.
Setting the Status to In Progress

- The Status will advance to Assigned if you use the Auto Assign option or if you re-assign the request to another technician or Support Group.

- If you assigned the request to yourself, set the Status to In Progress.
Save the Incident

☐ Save the Incident when you are certain everything has been documented based on the call and any investigation that you have performed up to now.
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Creating Incidents using Templates
What are Incident Templates?

- Templates simplify the process of recording incidents.
- Used to aid the Call Taker with a quick reference and guidance to “Routine” or “Complex” scenarios.
- Templates can quickly associate one or more Configuration Items and identify the appropriate Operational and Product Categorizations.
Select an Incident Template

Incident Templates are permission based, available to the support groups that need them. **UVAHS** will have different templates available to different groups.

Place the cursor inside the field and press the **Enter** key, or click on the **Magnifying Glass** button located to the right of the field. The Templates you have access to will display.
If you are a member of two or more Support Groups, you can use the Viewing Templates for Support Group menu to see which group you want to select from.
Click on the Template you wish to use, and then click on Select. Your Incident Request will be populated.
The Template values are populated into the new Incident. Helpful information may be provided, such as questions to ask. You can make changes to the template populated values.
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Working with Related Records & Duplicates
What are duplicate tickets?
- Two or more requests that are exactly alike and often produced at the same time for the same individual.

Why to avoid duplicate tickets?
- Reduces Notifications
- Reduces resource utilization
- Provides accurate accountability of services provided.

How to avoid duplicate tickets?
- Search for pending or opened Incidents by the user.
1. Identify the Customer through the Customer*+ field.
2. Verify the request is not a duplicate request.
3. If request already exists, update the existing Incident Request.
4. Save the existing Incident Request.
Open a new Incident Request form, type the Corporate ID into the **Customer** field, and press the **Enter** key on the keyboard.
In the Quick Action area, select **Customer’s Incidents**.

The number 1 next to **Customer’s Incidents** let’s you know that the customer has least one previous request.
From the New Request mode of the Incident Request, you can review the customer’s open requests – these are Incidents with a **Status** of Pending or less.
Review the Open Incident Requests

Review the Incidents for the customer. If it is a duplicate, create a Work Detail entry. The Assignee will be notified of the Work Detail you add.
To add a work detail, click on the Work Detail section of the existing Incident Request.

Go to the bottom of the section and expand the More Details option to view additional field options.
The Work Info Type field has a list of options, including General Information, that can be used to define communications and historical activities performed on the request. Use them as often as possible.
In the Notes field, write that you have **Informed the customer that the issue was being worked on and that they would be notified as soon as it was resolved.** Ensure the Work Info Type field has Customer Status Update since they are the ones who called you.

- If you want the customer to see it, mark as “Public”
- Click the **Add** button when done.
Save and close the updated Incident to return to the Original Incident Request form.
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Searching for Incidents
When would I search for Incidents?

- Assigned to an Incident by another technician or support group.
- Trend analysis
- Multiple customers having the same issue/request during the same time span
- Reporting

Managing Incidents

- Review unassigned Incidents for specific support groups.
- Review work load for support staff
Searching for Incident Requests

Search Options

- Console Searches
- Field specific search
- Standard Search or Query By Example (QBE) Search
- Saving Searches
**Section A:** Incident Counts – Changes the results list table based on counts selection

**Section B:** Search Incidents option opens the Incident form in Search Mode.

**Section C:** Filter By Option allows for results list modification results from a list of modifiable fields.

**Section D:** Add To Watch List places the selected Incidents on a watch list.
Manage My Searches is accessed through the magnifying glass.

Give the search a name, and then select the Build Search Qualification button.
Build your search, using the **Advanced Qualification Builder**. The Qualification is based on a formula of ‘**Field Name**’ **Operator Symbol** “**Value**”. When you’re done, click on **Select**.

![Advanced Qualification Builder](image-url)
- Enter the name of the search into the **Search Name** field and press the **Save** button.
After you save your search, the system moves it to the My Searches area.
- The new search can be accessed through the **Filter By** drop down under the **My Searches** option.
Selecting the **More Filter** option brings up three sets of attributes that can be used to refine search results.
From the Incident Management console, select **Search Incident** to open the search form. Within the primary Incident search form is where the majority of Users perform their searches.
Selecting **Search Incident** from the Incident Management console allows different search options within this form to include Query By Example and Advanced Searches.
Searching within any of the fields that displays a Plus Symbol (+) will result in a different search results capability.

For example, entering in the Incident ID*+ field a number – 1402 – and pressing the Enter key will bring back request INC000000000001402.

Putting a Group into the Assigned Group*+ field will **only** bring back the group listing containing that value.
You have the ability to search on any field in the search form, on all of the tabs. Type into the form, or use the drop down menu and make a selection. Then click on the Search button.

Narrow down your search results by populating multiple fields for your search query. Your search results are limited to 2000 records.
Use the keywords `$DATE$` or `$TIMESTAMP$` in a date field, or you can use `>01/01/2017` to give you all records since 01/01/2017.
Advanced Searches

Selecting the Advanced Search link will open the Advanced Search window at bottom of the page.

Write the search criteria using the formula of ‘Field Name’ Operator Symbol “Value”. Once you’ve built your search qualification, select Search.
Listed are some of the Wildcards and Relational Operators that can be used when building your search query.

Wildcards:

- Underscore (_)
- Percent Symbol (%)

Relational operators used:

<  >  <=  >= !=

**NOTE**: When more than one field in the QBE is being used in the search, the ‘**AND**’ operator is used by the system.
Here are some of the more common keywords and terms to use when building a search query

Keywords:

$USER$  $NULL$
$DATE$  $TIMESTAMP$

Date/Time Fields:

Epoch Time storage

Formula: Seconds * Minutes * Hours * Days * Years

EX: 60 * 60 * 24 * 7 = Past Seven Days or Up to Seven Days from now.
After running a search, select the **Searches > Save Search** option.
In the **Save or Redefine Search** dialog, enter the name of the search.

Select the **OK** button to save the search.
Once the search has been saved, you can select Searches > Run My Searches or Load My Searches or Manage My Searches options.
This concludes the module on how to create Incidents in the new ITSM system. Next, we’ll move on updating and resolving our Incidents.

Let’s Continue!