



WELCOME

UVAHS REMEDY

INCIDENT MANAGEMENT



❑ Updating and Resolving Incidents

- ❖ [Assigning, Re-Assigning, Updating and Resolving Incidents](#)

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 Incident Mgmt.



Incident Management v9.x User Training Class

Updating and Resolving Incidents

Working the Incident

“Why am I getting
this Incident
ticket?”



Incident
Assignee



Review the **Notes**
for additional
information or
responses needed.

An email assignment notification is received or you notice the unassigned request in the Incident Management Console.

What should you do? Check the Notes, Work Info, Relationships, Categorization and Customer tabs to determine implementation requirements.

Do You Accept the Request?

- Should I work on the Request?
 - If **Yes**,
 - Open the Incident Request, set the **Status** to **In Progress** and set the **Assignee** field to you.
 - or
 - Through the Incident Management Console, highlight the Incident request and select **Quick Actions > Assign to Me** option.
 - If **No**, re-assign the ticket to the appropriate Support Group or exit the ticket to allow the appropriate person to complete the assignment.

Assign or Re-assign the Incident

Incident Console

View Broadcasts Show Assigned To All My Groups Filter By All Open > All Priorities Role All

Counts

- Open: 23
- Unassigned: 5
- Unacknowledged: 19
- Breached: 0

Incidents

Create View Print Process Overview Service Context Quick Actions

Showing 1 - 23 of 23

ID	Summary	Service	Priority	Status	Assignee
INC000000000074	Customer needs access to ITSM Application.		Low	Assigned	Mary Mann
INC000000000069	Email Service is Down		High	Assigned	Student 002
INC000000000066	Email Service is Down		High	In Progress	Allen Allbrook
INC000000000064	Email Service is Down		High	Assigned	Student 001
INC000000000058	Blue Screen Appears on Laptop		High	Assigned	

Details and Tasks

Create View Report Show Tasks >>

Showing 0 - 0 of 0 Preferences

Type	Notes	Files	Submit Date	Submitter

Status Reason:

Assigned Group: Backoffice Support

Reported Date: 2/17/2013 9:03:28 AM

Customer: Joe Unser

Notes: Access is being requested to be able to submit and modify Incident Requests.

Service:

4. Review the information about the Incident at the bottom of the Incident Console.

Assign or Re-assign the Incident

▼ Details and Tasks

Status Reason:

Assigned Group: Backoffice Support

Reported Date: 2/17/2013 9:03:28 AM

Customer: Joe User 

Notes: Access is being requested to be able to submit and modify Incident Requests.

Service:



Create



View



Report

Showing 0 - 0 of 0

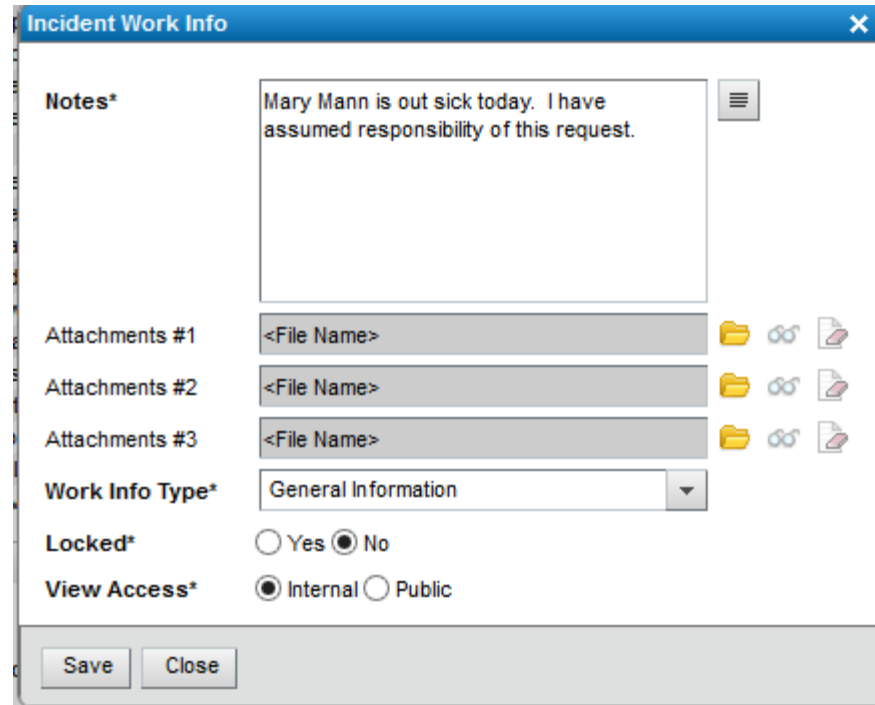
Type

Notes

Files

Include a Work Info into the request from the Incident Console – Select Create button.

Assign or Re-assign Incident



The screenshot shows a dialog box titled "Incident Work Info" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Notes***: A text area containing the text "Mary Mann is out sick today. I have assumed responsibility of this request." with a menu icon to its right.
- Attachments #1**, **Attachments #2**, and **Attachments #3**: Each has a text input field containing "<File Name>" and a set of icons (folder, link, and document) to its right.
- Work Info Type***: A dropdown menu currently showing "General Information".
- Locked***: Radio buttons for "Yes" and "No", with "No" selected.
- View Access***: Radio buttons for "Internal" and "Public", with "Internal" selected.
- At the bottom are "Save" and "Close" buttons.

Complete the Work Info and press the Save button.

Work from Within the Incident

Incident Console

Show Filter By Role

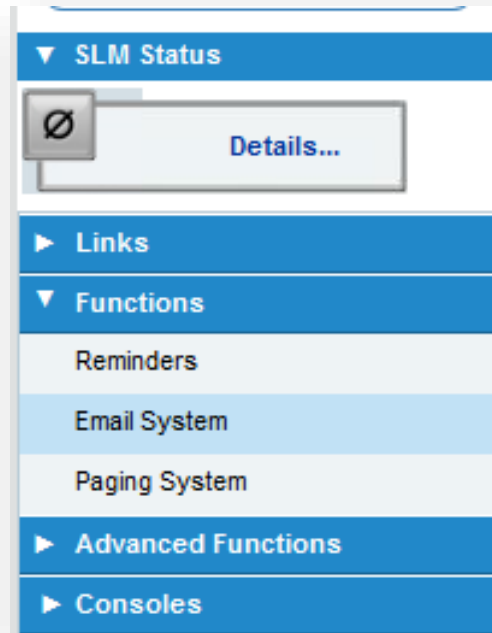
Incidents

Create View Print Process Overview Service Context Quick Actions

Showing 1 - 10 of 10

ID	Service Request...	Summary	Service	Priority	Status	Assignee	Target Date
INC000000002511		test		Low	In Progress	Student 001	
INC000000002435		ST009 OUTLOOK ISSUE: Not Receiving Em		Medium	Assigned	Student 001	
INC000000002424		LAPTOP ISSUE: No power to Device		Low	Assigned	Student 001	
INC000000002384		JH ISSUE: Unable to Save a ticket in Remer		Low	Assigned	Student 001	
INC000000002378		685 Install Request: Install Internet Explorer		Low	Assigned	Student 001	
INC000000002299		PRINTER ISSUE: Cannot Print		Low	In Progress	Student 001	
INC000000002243		JCH INSTALL REQUEST: Install Internet Ex		Low	Assigned	Student 001	
INC000000002227		EM OUTLOOK ISSUE: Not receiving email E		Medium	Assigned	Student 001	
INC000000002025		KEYBOARD ISSUE: keys sticking		High	In Progress	Student 001	
INC000000002002		KEYBOARD ISSUE: Keys sticking		Medium	In Progress	Student 001	

- ❑ Select Functions > Email System to send a message to the customer.



Contact the Customer

Email By Person | Email Log

People Search Criteria

Company+ Phone Number+

First Name+

Last Name+

Select Current Customer | Select Current Assignee | Clear

Search | View

1 entries returned - 1 entries matched | Preferences | Refresh

First Name	Middle Name	Last Name	Login ID	Business Phone Nu...	Internet E-mail
Joe		Unser	Joe	1 212 555-5454 (66)	J.Unser@calbroservices.com

Email Information

Internet E-Mail*

Email Subject Line*

Email Message Body*

Email Attachment (Limit 1 Attachment)

File Name	File Size	Attach Label
		Email Attachment

Add

Send Email Now

Close

The Customer's email address is auto-filled. You can change it or add additional email addresses.

Use semi colons (;) between additional email addresses.

Use the buttons and typing to update the Email Message Body entry.

- ❑ Select the **Send Email Now** button, followed by the OK (message) and Close button.

Email By Person
Email Log

People Search Criteria

Company+	<input type="text"/>	▼	Phone Number+	<input type="text"/>
First Name+	<input type="text"/>			
Last Name+	<input type="text"/>			

Select Current Customer
Select Current Assignee
Clear

Search
View

1 entries returned - 1 entries matched Preferences ▼ Refresh

First Name	Middle Name	Last Name ^	Login ID	Business Phone Nu...	Internet E-mail
Joe		Unser	Joe	1 212 555-5454 (66)	J.Unser@calbroservices.com

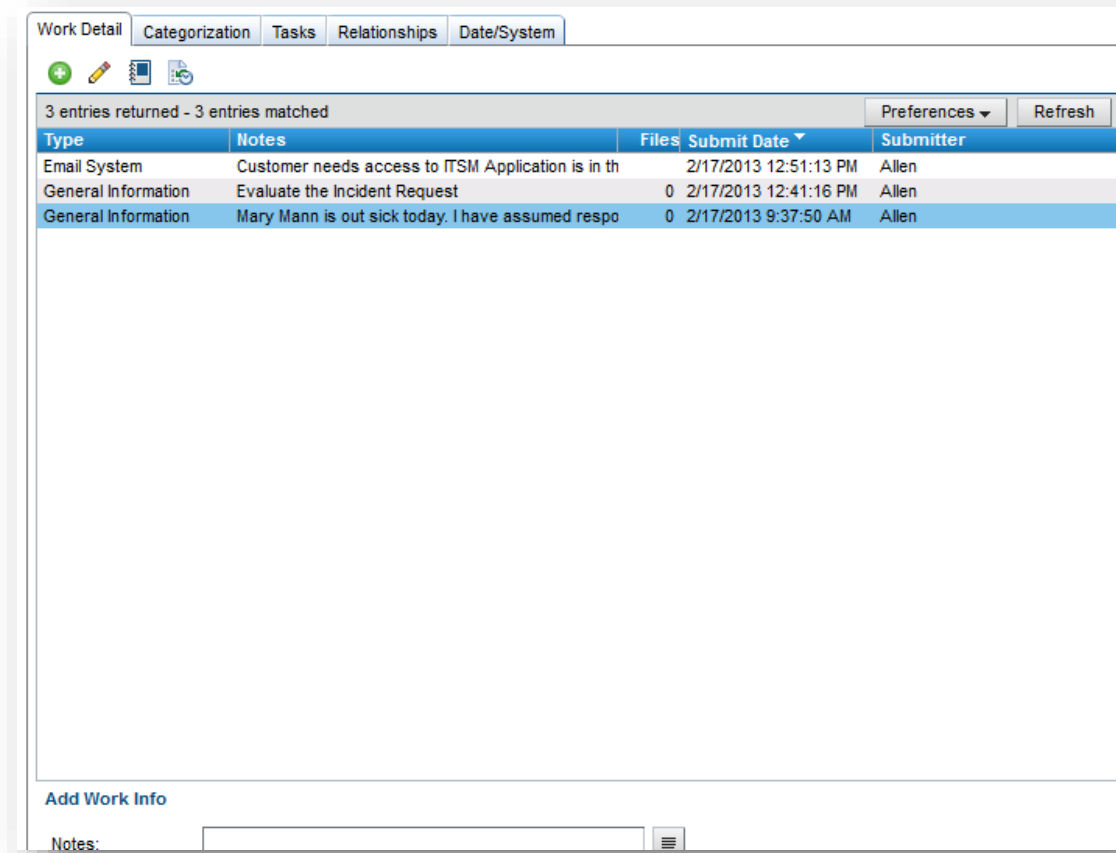
Email Information

Internet E-Mail*	<input type="text" value="J.Unser@calbroservices.com; a.allbrook@calbroservices.com"/>	☰	Insert Current Field Value Into Email Message Body <input type="button" value="Status"/> <input type="button" value="Summary"/> <input type="button" value="Details"/> <input type="button" value="Resolution"/>
Email Subject Line*	<input type="text" value="INC000000000074"/>	☰	
Email Message Body*	<input type="text" value="Customer needs access to JSM Application is in the In Progress state. You have requested 'Access is being requested to be able to submit and modify Incident Requests.' Is this correct? Please contact me at 443-333-3838 when you receive this email."/>	☰	

Email Attachment (Limit 1 Attachment)

File Name	File Size	Attach Label
Email Attachment		

- The result of the Email Message is recorded in the Work Detail section.



Work Detail | Categorization | Tasks | Relationships | Date/System

3 entries returned - 3 entries matched | Preferences | Refresh

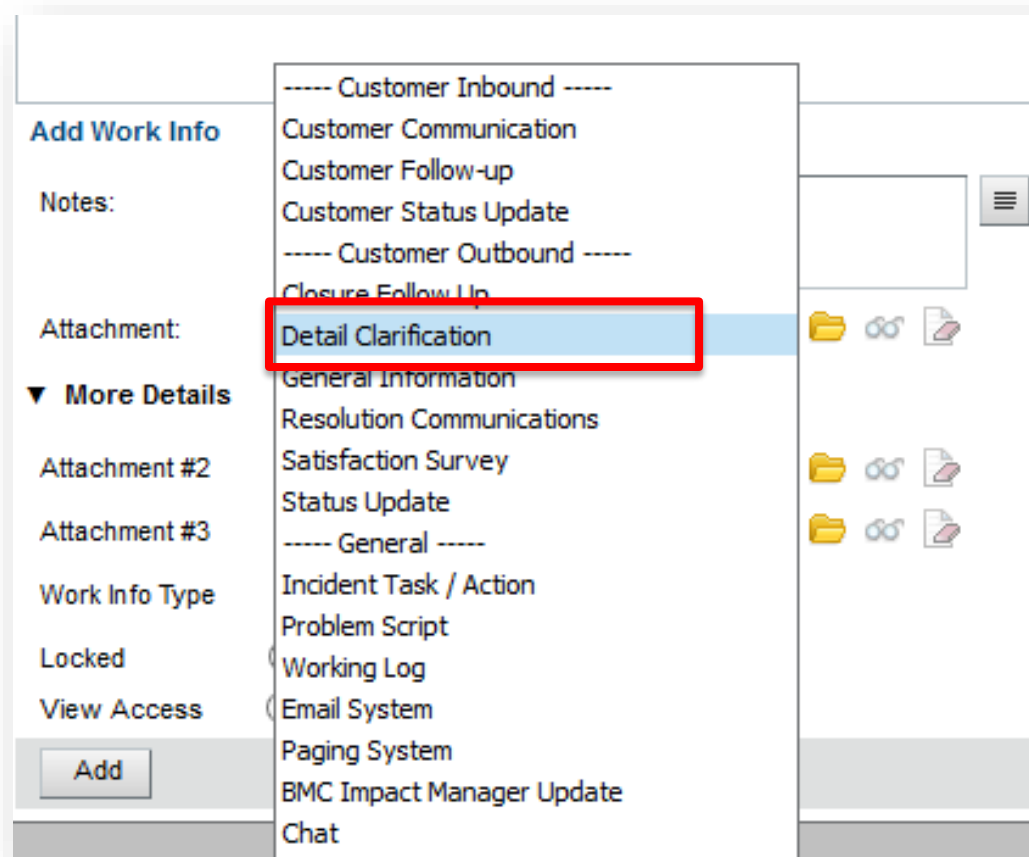
Type	Notes	Files	Submit Date	Submitter
Email System	Customer needs access to ITSM Application is in th		2/17/2013 12:51:13 PM	Allen
General Information	Evaluate the Incident Request	0	2/17/2013 12:41:16 PM	Allen
General Information	Mary Mann is out sick today. I have assumed respo	0	2/17/2013 9:37:50 AM	Allen

Add Work Info

Notes:

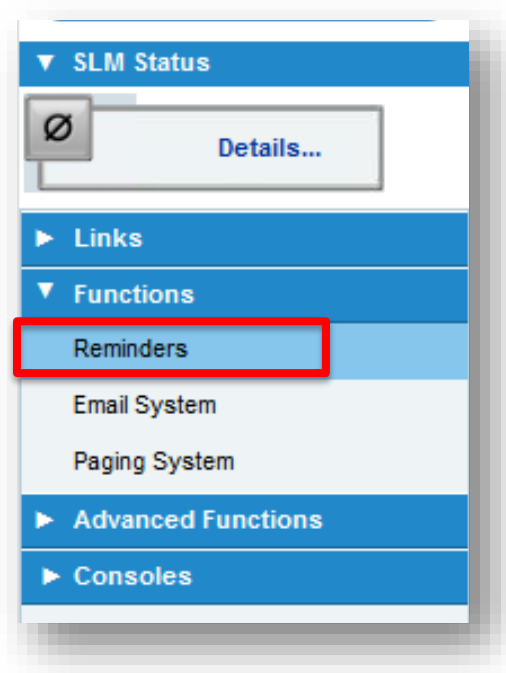
Update the Work Detail Section

- ❑ Communicate the delay to the customer – Detail Clarification and View Access = Public



Reminder of the Request

- ❑ Reminders are used to send a reminder someone, or an entire group, of something that needs done.
- ❑ Often times you can send a reminder to yourself, to remember to do something.



Reminder of the Request

Reminders

Show Reminders **Create Reminder**

Show Reminders ▼

Preferences ▼ Refresh

Message	Reminder Time	Person/Group	Sent
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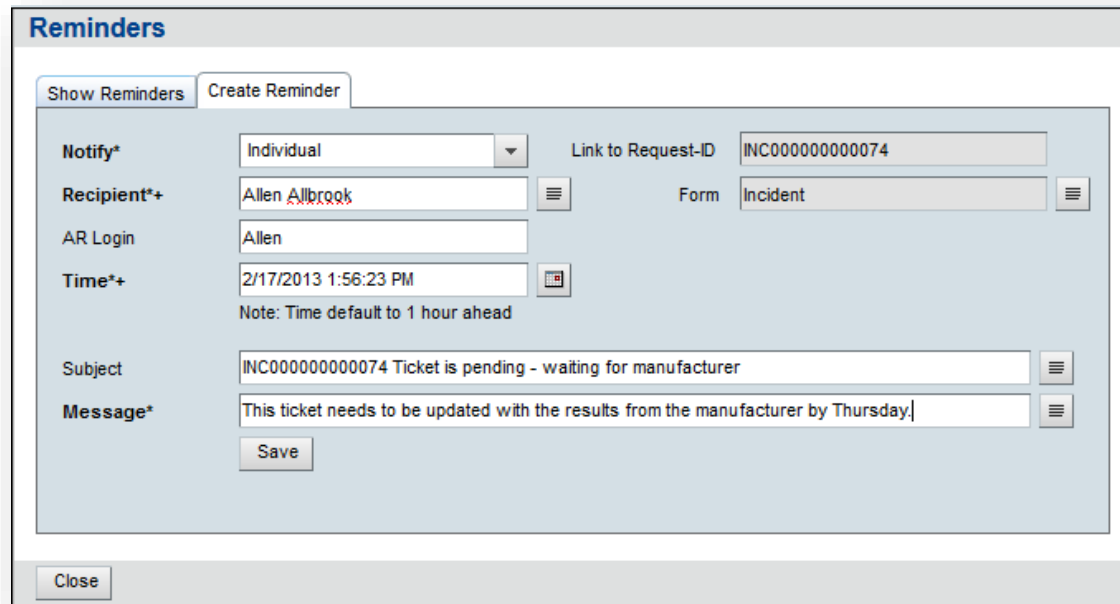
View Delete

Close

Select the Create Reminder tab to set up the reminder message.

Reminder of the Request

- ❑ Type in your first and last name into the Recipient's field to send the message to yourself. Then enter a subject and the message detail information.
- ❑ Set the Time when you want to be emailed – one hour or later from now – Select **Save**.

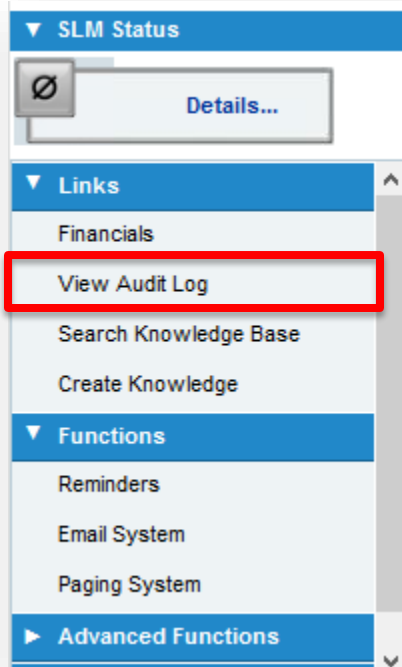


The screenshot shows a web-based form titled "Reminders". At the top, there are two tabs: "Show Reminders" and "Create Reminder". The form contains the following fields and controls:

- Notify***: A dropdown menu set to "Individual".
- Link to Request-ID**: A text input field containing "INC000000000074".
- Recipient*+**: A text input field containing "Allen Allbrook".
- Form**: A dropdown menu set to "Incident".
- AR Login**: A text input field containing "Allen".
- Time*+**: A text input field containing "2/17/2013 1:56:23 PM". Below this field is a note: "Note: Time default to 1 hour ahead".
- Subject**: A text input field containing "INC000000000074 Ticket is pending - waiting for manufacturer".
- Message***: A text input field containing "This ticket needs to be updated with the results from the manufacturer by Thursday.".

At the bottom of the form, there is a "Save" button and a "Close" button.

Audit: Changes to the Incident Fields



Sometimes you will see a message indicating that the ticket has been updated since you last opened it. Do you want to continue – Yes or No?

The recommendation would be to continue your change and then review the earlier change by selecting **Links > View Audit Log** option.

This will display the list of changes performed by the other technician.

Audit: Changes to the Incident Fields

- ❑ Certain attributes are recorded when changes occur. This includes Status and Assignee attributes.

Incident Audit Log

Form Audits | Notification Audits

Audit Type: ALL

9 entries returned - 9 entries matched | Preferences | Refresh

Audit Date	Fields Changed	Modified By
2/17/2013 9:13:38 AM	;Status;Status History;Produ	Allen
2/17/2013 9:13:38 AM	;Assignee;	Remedy Application Servic
2/17/2013 9:15:00 AM	;Assignee;	Allen
2/17/2013 9:15:01 AM	;Assignee;	Remedy Application Servic
2/17/2013 9:27:47 AM	;Assignee;	Allen
2/17/2013 12:32:42 PM	;Product Categorization Tier	Allen
2/17/2013 12:41:17 PM	;Status;	Allen
2/17/2013 1:15:05 PM	;Status;	Allen
2/17/2013 1:16:32 PM	;Status;	Allen

Changes

Status: In Progress (2)

Close

Verification



Verification Agent

- Set the Incident Request to **Resolved** when the issue has been resolved or cannot be resolved.
- Fill in the **Resolution** field, describing how you resolved the incident. Be sure to give enough details so that other technicians can use your information to resolve the same issue should it occur again.

This concludes the module on how to use the Remedy ITSM to update and resolve your Incidents. Next, we'll move on to the summary for the course.

Let's Continue!