Remedy ITSM IM 9.1 Quick Reference

This quick reference describes the tasks most commonly performed when working in Remedy ITSM 9.1 **Incident Management**.

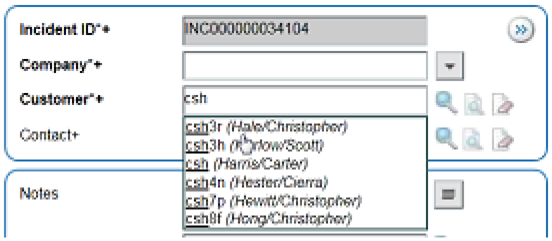
Accessing Incident Management

Click the Application Flyout, hover over *Incident Management* and select the *Incident Management Console*, *New Incident* or *Search Incident.*

Creating a Quick Close Incident

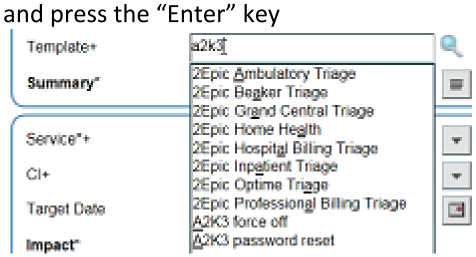
To create an incident ticket, from the Overview Console, click on the Application Flyout and Select *Incident Management -> New Incident*

1. Click in the *Customer*+* field and begin typing the customer's ID and with type ahead functionality, suggestions will be presented.



2. If the Customer ID does not appear, then place the cursor in the *Customer* field and press the "Enter" key. A search box will appear. Enter the Customer's last name and click *Search*. Double-click on the Customer in the display table below to select.

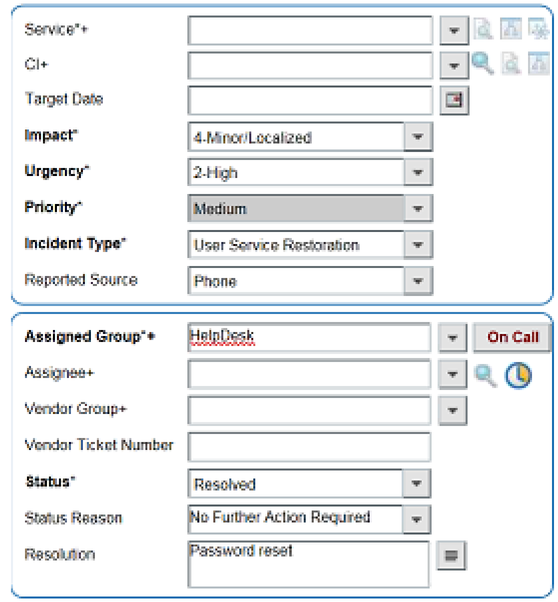
3. Place curser in the *Template* field and begin typing the issue the customer has contacted the Service Desk about. Or, place your curser in the *Template+* field and press the "Enter" key



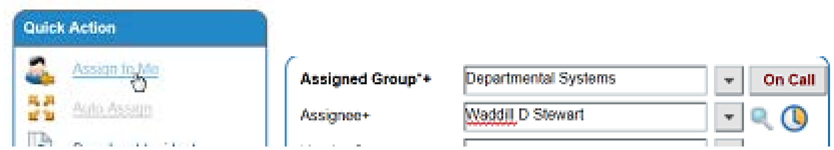
4. Select the appropriate Template and Click *Select -> Close*

5. Enter additional content in the *Notes* field regarding the issue or request.

6. The template has completed all the required fields including the Op Cats for you.



7. Under Quick Actions click *Assign to Me*.



8. Click *Save*.

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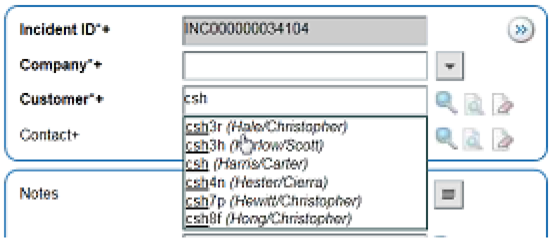


2. If the Customer ID does not appear, then place the cursor in the *Customer* field and press the "Enter" key. A search box will appear. Enter the Customer's last name and click *Search*. Double-click on the Customer in the display table below to select.
3. Enter additional content in the Notes field regarding the issue or request

Customer Incidents

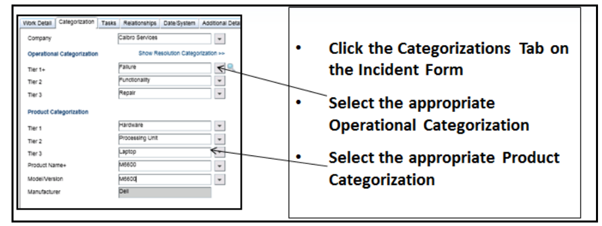
To check open tickets by this customer to see if the customer has called about this issue before.

1. Under Quick Actions, look at the *Customer Incidents*. If there is a number, click on it to see the customer's open tickets.
2. Click on the ticket to select it.
3. In the *Add Work Info* area, specify any additional work performed to resolve the incident.
4. In the dropdown to the right of the *Status* field and select Resolved.
5. Select the appropriate *Status Reason*
6. Confirm all other required fields are completed.
7. Click *Save*

Operational and Product Categorization

To add Op Cats and Pro Cats to a ticket for tracking and reporting.

1. Under Quick Actions, click Select Operational and enter the Operational and Product Categorizations, Product Name and model/version as applicable.

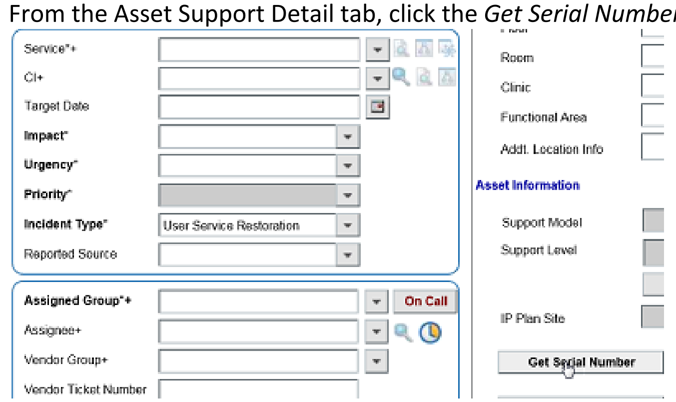


2. Select the appropriate *Incident Type* and *Reported Source*
3. Click *Save*

Asset Support Details Tab

To track the asset that needs to be worked on.

1. From the Asset Support Detail tab, click the *Get Serial Number* button.



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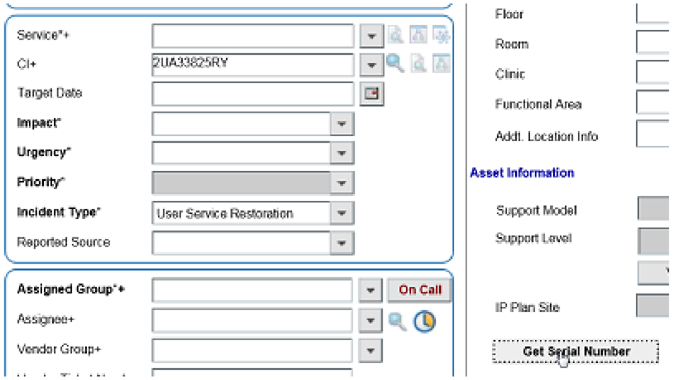
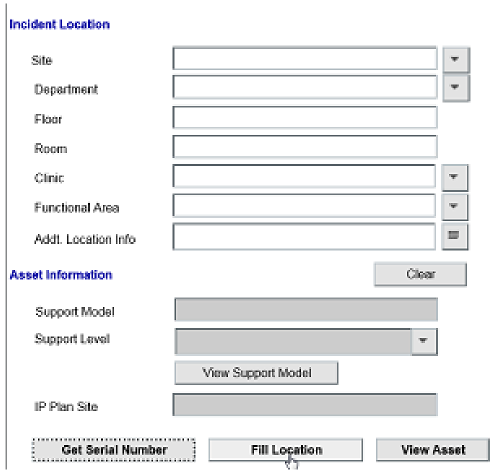
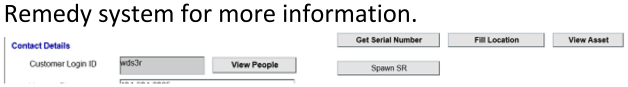
2. The serial number of the last computer they logged into displays in the *CI+* field.



3. Click on the *Fill Location* button.



4. The *Incident Location* fields fill in.
5. By clicking *View People* or *View Asset* buttons you will be taken to the old Remedy system for more information.



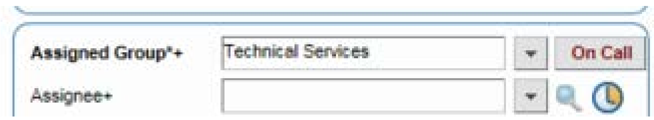
6. By clicking the *Spawn SR* button, you will create a Service Request in the old system. So, you can work on it in the old system as a Service Request.

Note: you may need to Refresh to see the Req# in ITSM. Also the ITSM ticket will automatically close.

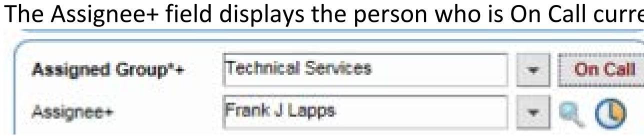
Assigning the Incident to On Call

To an incident to a person On Call.

1. In the dropdown to the right of the *Assigned Group* field, select the group.



2. To assign the incident, click the *On Call* button next to *Assigned Group* field. The Assignee+ field displays the person who is On Call currently for that group.



Assigning the Incident to Yourself

To quickly assign an incident to yourself.

1. To assign the incident to yourself, under *Quick Action*, select *Assign to Me*
2. If you are a member of more than one support group, select the group to assign the incident to and click *OK*

Resolving the Incident

To resolve an incident. The system will automatically close it after 2 days.

1. In the dropdown to the right of the *Status* field and select Resolved.
2. Select the appropriate *Status Reason.*
3. In the *Add Work Info* area, specify any additional work performed to resolve the incident.
4. Confirm all other required fields are completed.
5. Click *Save*

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Creating an Incident from MyIT

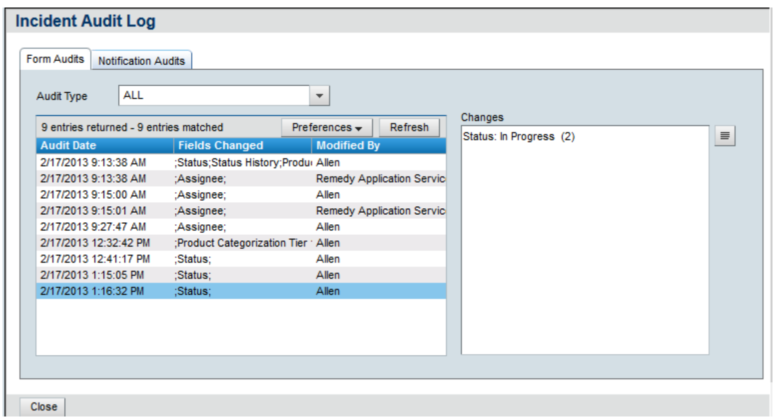
To create an incident ticket from a MyIT email.

1. An email from MyIT is delivered.
2. Click on link, from the email, to open ticket in ITSM.
3. Refresh the browser to get ITSM full functionality.
4. Confirm all other required fields are completed.
5. Click *Save*

View Audit Log

To view the audit log to see who made changes to a ticket.

1. With the ticket displayed, from the Functions Menu click on *More*.
2. Select *View Audit Log* from the menu.

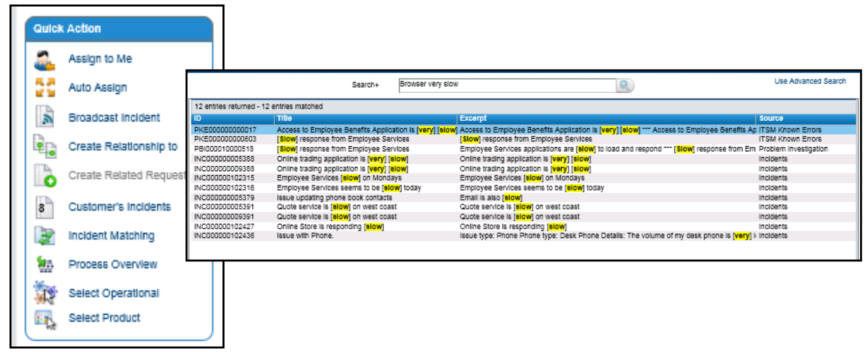


3. The *Form Audits* tab, displays certain attributes recorded when changes occur. This includes Status and Assignee attributes.
4. Click the *Notifications Audits* tab to view attributes recorded on notifications.

Incident Matching

To find other tickets/incidents with a similar summary to find solutions or to see if there are other calls coming in with the same issue.

1. Click on Incident Matching to view a list of possible matching records. The matching is based on the Summary of the Incident. Select the incident to view the incident details. Continue using Advanced Search as needed.



2. Double Click on the record you want to view. Review the record. Click *Close.*
3. When selecting Relate with Solution, the resolution of the incident will populate in the Resolution field of the Incident being worked on
4. Click *Close.*

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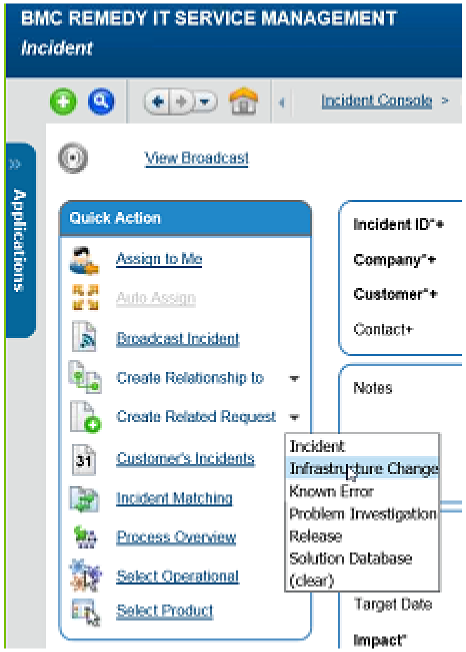
Creating a Change Request from an Incident

To create a Change Request, formerly known as a Design Request, from an Incident.

1. With the ticket displayed, first resolve the incident. (see above)
2. Under *Quick Actions*, select *Create Related Request*.
3. In the dropdown to the right, *select Infrastructure Change*.



4. Under Quick Actions, click Requestor For. Search by last name and select the requester from a list.
5. Click in the *Template*+* field and begin typing the Group ID and with type ahead functionality, suggestions will be presented. Select the template.
6. Tip: Click save to see what other fields are required.
7. Now complete the Change process including plan, approval, implementation and completion.