

# ITSM IM Quick Reference- Creating a Ticket

## Create a new Incident

1. From the Incident Console, click either the 'Create' button or 'New Incident' option under Functions to open the Incident Entry screen.

## Record Customer information

1. Click in the *Customer\*\** field and begin typing the customer's user ID (suggestions will be presented).

The screenshot shows the Incident Entry form with the following fields and suggestions:

- Incident ID\*+:** INC000000063073
- Customer\*+:** pma
- Customer Phone\*+:** pma3f (Aitchison/Paul), pma5d (Aldrich/Pamela), pma3v (Amos/Penny), pma5a (Amrhein/Paul), pma3q (Anderson/Phillip), pma4n (Apusen/Paulino), pma6d (Arrington/Pauline), pma4ma (Avenill/Patricia)
- Contact\*+:** (empty)
- Notes:** (empty)
- Template\*+:** (empty)
- Summary\*:** (empty)

2. If the Customer ID does not appear, you use the search functionality to find the customer.
3. Verify the customer Phone is correct. Update customer phone for the incident if needed.
4. Once *Customer\*+* is populated, Customer's Incidents on the left hand menu will populate with a count of open incidents for that customer. Click on Customer Incidents to see a list of open incidents to confirm whether they are calling about an existing issue.
5. Use Contact+ to record the person reporting the issue if they are reporting on behalf of someone else.

## Select Template, Record Summary Information

1. Templates have been created for most common incidents for each support group. Templates automatically enter default values for incident fields and should be used when available to ensure consistent tracking of similar issues.
2. Place your cursor in the *Template* field and begin typing a keyword to see a list of matching templates.

The screenshot shows the Incident Entry form with the following fields and suggestions:

- Notes:** (empty)
- Template\*+:** epic
- Summary\*:** Epic account unlocked, Epic default printer, Epic missing account number

3. When you select the template you will see that additional fields have been populated. In addition to fields on the main screen, categorization fields have also been populated.
4. Add additional Notes to the incident to describe the specifics of this instance of the issue.
5. Adjust the default impact and urgency if required.

## Record Asset, Location Details

1. Record the serial number of the user's device in the Configuration Item (*CI+*) field. The 'Get Serial Number' button on the Asset/Support Details tab can be used to populate the serial number of the most recent device the user logged into in the *CI+* field.

The screenshot shows the Incident Entry form with the following fields and suggestions:

- Notes:** (empty)
- Template\*+:** (empty)
- Summary\*:** Epic account unlocked
- Service\*+:** (empty)
- CI\*+:** 2UA5062HTV
- Target Date:** (empty)
- Impact\*:** 2-Significant/Large
- Urgency\*:** 3-Medium
- Priority\*:** Medium
- Incident Type\*:** User Service Restoration
- Reported Source:** Phone
- Assigned Group\*+:** PMO
- Assignee\*+:** Josh Baumann
- Vendor Group\*+:** (empty)
- Incident Location:** Site: Battle Building, Department: Pediatrics, Floor: 5, Room: 5116, Clinic: Speech Language Pathology, Functional Area: Conference Room, Addt. Location Info: TV Desk Left Computer
- Asset Information:** Nearest Phone: (empty), Support Model: HSTS, Support Level: Full, IP Plan Site: Battle Building

2. Once *CI+* is populated, use the 'Fill Location' button to populate the Incident Location details based on the location of the asset/device. Verify location information with the customer and update if needed.
3. Review details and click Save to save the incident. This will send notification to the Assigned Group or Assignee selected.

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## If no appropriate is Template available

If no existing template is appropriate for the issue the customer is reporting, you must manually enter required fields and assign to appropriate the group.

### Record Summary Information

1. Add Notes to the incident to describe the specifics of this issue. Enter a brief description in the Summary field.

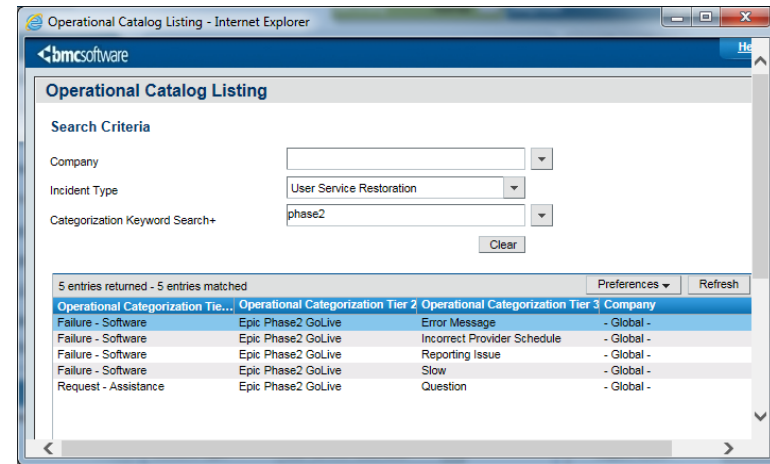
### Record Impact, Urgency

1. Select appropriate values for Impact and Urgency. This will populate the Priority which will determine the service level target timeframe. Incident Type is defaulted to 'User Service Restoration'

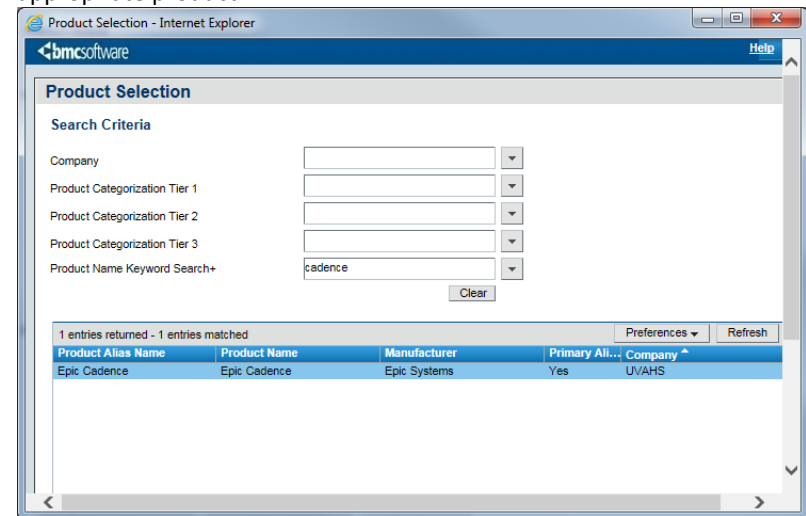
Priority	Urgency			
	4 – Low	3 – Medium	2 – High	1 – Critical
	Prevents the user from performing a portion of their duties	Prevents performance or critical time sensitive functions	Service or major portion of a service is unavailable	*Used when minor/localized incident should be considered high priority
Impact				
4 – Minor/Localized One to a few users located in a single department/clinic	Low	Medium	Medium	High
3 – Moderate/Limited Multiple users of a specific service.	Low	Medium	High	High
2 – Significant/Large Most users of a specific service.	Low	Medium	High	Critical
1–Extensive/Widespread All users of a service affected.	Low	High	Critical	Critical

### Categorization

1. Use 'Select Operational' item from the Quick Actions menu to open a search screen for the appropriate operational category. Enter a keyword search and select the appropriate operational categorization.



2. Use 'Select Product' item from the Quick Actions menu to open a search screen for the appropriate product category. Enter a keyword search and select the appropriate product.



### Support Group

1. Enter the appropriate support group to resolve the customer issue. If appropriate select the assignee+
2. Refer to section above for entering Asset and Location information, reviewing details and saving the incident.