BMC Remedy

Incident Management

Quick Start User Guide – Training Manual

Version 3.0

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How to display Incident Console window

1. Go to ithelp.yorku.ca and log on using your Passport York credentials
2. If not already displayed, you can get to the **Incident Console** window by clicking on **>> Applications** tab (top left-hand side of screen) and scroll down to **Incident Management** and over to **Incident Management Console**

How to set up your Profile

1. **Incident Console** window – click on **Functions**
2. Click on **My Profile**
3. Click **Assignment Availability** drop-down menu to select **Yes**
4. Click on **General** tab to edit values if necessary – **Phone Number**, **Site+**, **Desk Location**
5. Click on **More Details** tab to add your pager or mobile phone numbers
6. Click on **Notifications** tab - **Notification Availability** – drop-down menu to select **Yes** to ensure you get tasks assigned to you
7. Click on **Save**
8. Click on **Close**

How to set up your Preferences

1. **Incident Console** window – click on **Functions**
2. Click on **Application Preferences**
3. **Default Home Page** – **Incident Management Console** (to see Incidents) or **Overview Console** (to see Incidents, Change Requests and Tasks)
4. **Company*** - **York University**
5. **Show - Assigned To All My Groups** or **Assigned to My Selected Groups**
6. Under **Incident Management** tab
7. **Show Incidents** – **Yes**
8. **Incident Status** - **All Open Incidents**
9. **Role** – **Assigned Group**
10. **After New Save** - select either **New Request After Submit** which will clear your screen and open up a new Incident screen or **Modify Request After Submit** which allows you to confirm fields before submitting a new Incident
11. **Show Date System** – **Yes**
12. Under >> **Task Management** tab - **Show Task** – **Yes**
13. **Task Status** - **All Open Tasks**
14. Click on **Save**
15. Click on **Close**
16. **Logout** - upper right corner of screen and log in to use new settings

How to create a new incident

1. **Incident Console** window - click on **Functions** – **New Incident**
    a. **Note:** An Incident number is assigned immediately
2. In **Customer*****+** field - type in last name – list of names will appear Or alternatively, you can click in **Customer*****+** field and hit the Enter key to use **People Search** window to search on, e.g. email address, phone number, name, corporate ID (CYIN) – click on **Search** button
3. Highlight correct person and click on **Select**
4. Click on **Customer Details** icon beside **Customer*+** field to update customer phone number and location for that incident and also permanently for future incidents – **NEVER** update the Corporate 'Email Address' field. If you use the >> and update the fields, note that this will update the information for that incident only
5. **Contact+** field – type in last name value if there is an alternative person to contact
6. Fill in **Notes** field with additional information elaborating on what the issue/problem is and what needs to be done to complete customer's request
7. Fill in **Summary*** field - brief but meaningful – is the "**subject**" field
8. Select **Impact*** value for this incident using drop-down menu –
    - Extensive/Widespread meaning campus wide effecting everyone
    - Significant/Large meaning department wide potentially effecting many people
    - Moderate/Limited meaning department/division wide effecting a restricted number of people
    - Minor/Localized meaning office area affecting a small number of people
9. Select **Urgency*** value for this incident using drop-down menu
    a. Critical meaning crucial action required
    b. High meaning immediate action required
    c. Medium meaning important – to be looked at ASAP
    d. Low meaning action required when time permits
10. Using the definitions below select the correct **Incident Type*** value for this incident using the drop-down menu:
    - **User Service Restoration:** An incident where something breaks or there is an unexpected disruption to a normal business process

        Examples:
        - MyMail server is down
        - WebFAS is down
        - PC not booting up
        - The system/server is down and business is affected
        - Service/System is down with no workaround
        - Printer not working
        - Web page down/inaccessible
        - My computer has a blue screen
        - Something is broken or needs fixing

- **User Service Request:** An incident that has a planned process or procedure ready to be executed and the impact is minimal

  Examples:
  - Request for Password Reset (PeopleSoft/E-mail/Passport York/etc.)
  - Request for Installation of a pre-approved software
  - Request for a computer set up
  - Request for account creation
  - Web page update
  - Adding quota
  - Adding disk space
  - Any request for changes that have minimal or no impact
  - Application not working (Work/Excel/etc.)
  - Printer has run out of toner

11. Select **Reported Source** value for this incident using drop-down menu

    Reported Source definitions:

▪ Direct Input	you
▪ Email	received by e-mail submission
▪ External Escalation	Management intervened to escalate
▪ Fax	facsimile received
▪ Self Service	created by customer
▪ Systems Management	automatically submitted by system/application
▪ Phone	live agent
▪ Voice Mail	recorded message
▪ Walk In	person-to-person
▪ Web Console	submitted through Requestor
▪ Other	other than above
▪ BMC Impact Manager Event	tech support

How to select Operational and Product Categorizations

1. Under **Links** click on ‘**Categorizations**’
2. Under **Operational Categorization**, use drop-down menu and click on correct value; check Tier 2 for value
3. Under **Product Categorization**, use drop-down menus for all 3 **Product Categorization Tiers** or type a text value in **Product Name+** field, hit Enter
4. Highlight correct value and click on **Select**

How to assign an incident to another group

1. **Quick Actions -** click on **Auto Assign -** double click on correct group. You can also go to **Assigned Group*** – start typing name of group to see display, or use drop-down menu to select correct group
2. Do not select **Assignee+** unless it is within your own group
3. Click on **Save**

How to assign an incident to team member or self

1. From **Overview Console** window - double click on incident you want to work on
2. **Quick Actions -** click on **Assign to Me**
3. From **Incident Console -** under **Quick Actions** click on drop-down item - **Assign to Group Member** or **Assign to Me**

How to create Work Detail

Note: Information contained in this tab will *not* show up on the Requester Console nor go to the client.

1. Incident Console window
2. **Status*** - **In Progress**
3. Select and double click on an incident - click on **Work Detail** tab
4. Click on **> More Details** and use drop-down menu to select **Work Info Type**

Customer Inbound:

- Customer Communication - giving details
- Customer Follow-up - looking for details
- Customer Status Update - looking for status

Customer Outbound:

- Closure Follow up - final communication to customer
- Detail Clarification - additional information recorded for customer
- General Information - providing details to customer
- Resolution Communications - reasons for resolving incident
- Satisfaction Survey -requesting customer feedback
- Status Update - providing details to customer

General:

- Incident Task / Action - listing additional work required
- Problem Script - describing program script
- Working Log - lists steps taken
- Email System - reporting e-mail sent
- Paging System - reporting page sent out
- BMC Impact manager Update - describing tech support work on Incident

5. It is recommended not to change **Locked=No** because no one will be able to update fields within the incident
6. **View Access** - **Internal** = only users within your organization can see the entry
7. **View Access** - **External** = everyone with access to the system can see the entry
8. Under **Notes:** box type in your information
9. Note: A finite number of text entered (limited by the size of the Work Detail box) becomes the **Summary** line.
10. Optional - Add an Attachment and click on **Add –** Import the desired attachment
11. Click on **Save**

How to e-mail your Customer from incident

1. **Incident Console** window
2. Select and double click on an Incident
3. Click on **Functions**
4. Click on **Email System**
5. **Email Subject Line*** i.e. INC000000002023
6. **Note:** DO NOT OVERWRITE INCxxxxxxx or type in front of it - Only add information at end of INCxxxxxxx
7. **Email Message Body*** – click on **Summary** and/or **Details** buttons to add that information from ticket. Add your comments, query to customer, attachment if needed
8. (Optional) Adding an attachment file - see below
    a. Click on **Add**, then follow the screen window
9. Click on **Send Email Now** button
10. Click on **OK** to close pop-up window
11. Click on **Close** – e-mail entry will appear in W**ork Detail** window
12. **Status*** - change to **Pending** while awaiting a response from the customer
13. **Status Reason** - change to **Client Action Required**
14. Click on **Save**

How to create a Task

Create when you need another team involved in completing the client's request.

1. **Incident Console** window
2. Select and double click on an Incident
3. Click on **Links**
4. Click on **Tasks**
5. Use drop-down menu under **Request Type** to select **Ad hoc**
6. Click on **Relate** button
7. Type in a **Name*** of your task – e.g. Task 1 – Activate Drop
8. Type brief description of task under **Summary***
9. Optional – additional **Notes**
10. Use drop-down menu to select **Priority**
11. **General** tab – Optional - **Add** an attachment
12. **Requester** tab – submitter of task is the **Requester** name and customer is the **Requested For**

13. **Classification** tab – assign Operational and Product Categorization values
14. **Assignment/Dates** tab – select York under **Assignee Company**; appropriate department under
15. **Assignee Organization**; appropriate area under **Assignee Group+**
16. If required, **Dates/Time** fields – use the calendar icon to make appropriate dates and times
17. **Relationships** tab – not used
18. Click on **Save**
19. **Status** of newly created Task will be **Staged**
20. Click on **Close**
21. To go back, click on **Incident Console >**
22. Change the **Status*** of the incident to **In Progress**
23. Click on **Save**

How to work on a task assigned to you

1. Click on link in notification e-mail or when in **Incident Console** window click on **Show Tasks >>** (bottom right)
2. Double click on highlighted Task
3. Click on **Work Info** tab to view task information
4. Click on **Assignment** tab to **Start Clock** and **Stop Clock** on task (if required)
5. **Status*** – use drop-down menu to **In Progress** and **Status Reason** where applicable
6. Click on **Save**
7. Click on **Incident Console**

How to Add Time for Task (if required)

1. Click on link in notification e-mail or when in **Incident Console** window click on **Show Tasks >>** (bottom right)
2. Double click on highlighted Task
3. Click on **Assignment** tab
4. Click on **Effort Log** button
5. Under **Time Spent Hours*** use arrow up button to add time to yourself
6. Click on **Add to Effort Log** button
7. Click on **Close**
8. Click on **Save**
9. Click on **Incident Console**

How to reassign a Sequence to task groups and Tasks

1. Double click on the incident you want to work on
2. Click on **Links** > **Tasks**
3. In the Tasks and Task Groups table, select the task that you want to re-sequence.
4. Click either the up arrow or the down arrow located to the right of the table. This moves the selected task either higher or lower in the sequence.
5. Click **Close**

Note: ID Tas0000# nor Name of task does not change – only the Sequence column number changes

How to search for TASKS by Task ID

1. Log into http://ithelp.yorku.ca
2. Click on **Applications>>** then highlight **Foundation Elements** click on **Overview Console**
3. Click on **Search For Incident** (top right)
4. Pop-up window will appear – using drop-down menu highlight **Task** (Infrastructure Change Task name will appear)
5. Click on **Select** button
6. Type in the **Task ID** number
7. Click on **Search** button

How to change the setting so you do not see closed TASKS

1. Log into http://ithelp.yorku.ca
2. Click on **Applications >>** then highlight **Foundation Elements** click on **Overview Console**
3. Click on **Functions** (top left)
4. Click on **Select Status Values**
5. Under **Task** user drop-down menu to highlight **All Open Tasks**
6. Click on **OK** button

How to Cancel Incidents: Cancel Types

Out of Office

1. Click on **Status*** drop-down and select **Cancelled**
2. Click on **Status Reason** drop-down and select **OOO**
3. Click on **Save** button

Spam

1. Click on **Status*** drop-down and select **Cancelled**
2. Click on **Status Reason** drop-down and select **Spam**
3. Click on **Save** button

Project

1. Click on **Status*** drop-down and select **Cancelled**
2. Click on **Status Reason** drop-down and select **Moved to Project**
3. Click on **Save** button

No Response

1. If you have tried to contact client at least three times over a period of five days, by e-mail, visit or by phone (ensure Work Detail is updated with these contact attempts), e-mail client from ticket that you have been unable to contact them, and for this reason, incident is being cancelled. (see form e-mail at

http://www.yorku.ca/remedy)
2. Click on **Status*** drop-down and select **Cancelled**
3. Click on **Status Reason** drop-down and select **No Response**
4. Click on **Save** button

Duplicate

1. Click on **Status*** drop-down and select **Cancelled**
2. Click on **Status Reason** drop-down and select **Duplicate**
3. Relate the duplicate ticket to the original/parent ticket using **Relationship** process (Refer to page 9 – Duplicate Incident process)
4. Click on **Save** button

How to Resolve an Incident

PROCESS: Double check that the **Resolution Product Categorizations** is correct – go to **Links** and then **Categorizations**. If the initial Product Categorization is incorrect, select new entries for Resolution Product Categorizations.

1. **Incident Console** window
2. Select and double click on an Incident
3. Confirm that the Resolution Product Categorizations will be correct; if the initial Product Categorization is incorrect, select new entries
4. Click on **Resolve** button
5. A pop-up window will appear - (1) **Resolution*** field - type in how the issue was resolved (information goes to client) (2) **Status Reason** - use drop-down menu to select an option
6. Add Work Info section to add more informative solution to incident - will go under Work Detail – not mandatory
7. Click on 'Save'
8. **Status*** will automatically reset to **Resolved**

PROCESS: Tasks associated within incidents must be **Closed** before the incident can be resolved.
PROCESS: The system will automatically set incident status to **Closed** after 10 days

How to use Relationships Tab

Duplicate Incidents

1. **On the most current (child) incident**
2. Leave **Status Reason** blank
3. **Assignee+** value must be selected from the drop-down menu
4. Click on **Save** button
5. Click on **Relationships** tab

6. Using the **Search** drop-down menu select **Incident**
7. Click on magnifying glass icon
8. A pop-up window will appear - Type in the original (parent) **Incident ID+** number
9. Click **Search** button. The original (parent) incident will be displayed in the lower box
10. Using the **Select a Relationship Type** drop-down menu highlight **Duplicate of**
11. Click on **Relate** button
12. Click on **OK**
13. Click on **Save** button
14. Currently no other fields need to be filled in
15. When someone resolves or closes the original (parent) incident, its Operational and Product Categorizations and Resolution fields are copied to the related duplicates, marking them with a status of **Resolved**

Related Incidents

1. **On the most current (child) incident**
2. Leave **Status Reason** blank
3. **Assignee+** value must be selected from the drop-down menu
4. Click on **Save** button
5. Click on **Relationships** tab
6. Using the Search drop-down menu select **Incident**
7. Click on the magnifying glass icon
8. A pop-up window will appear - Type in the original (parent) **Incident ID+** number
9. Click **Search** button. The original (parent) incident will be displayed in the lower box
10. Using the **Select a Relationship Type** drop-down menu highlight **Related to**
11. Click on **Relate** button
12. Click on **OK**
13. Click on **Save** button
14. Currently no other fields need to be filled in
15. When someone resolves or closes the original (parent) incident, its Operational and Product Categorizations and Resolution fields are copied to the related incident, marking them with a status of **Resolved**

How to use Advanced Search

1. Log into http://ithelp.yorku.ca
2. Click on **Applications >>** then highlight **Incident Management** then **Incident Management Console**
3. Click on **Functions** then 'Search Incident'
4. Click on **Advanced Functions** then **Advanced Search**
5. Highlight type of Incident
6. Click on **Select** button
7. Using drop-down menus or by typing in text fields make your selections
8. Click on **Search** button