

Information Technology Support Center
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Management Basics

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REMEDY: MANAGEMENT BASICS

OBJECTIVE: TO ORIENT MANAGEMENT USERS WITH THE REMEDY AS IT PERTAINS TO HELPDESK ACTIVITIES.

SECTION I. LOGGING IN

SECTION II REMEDY MANAGEMENT CONSOLE

SECTION III CHANGE REMEDY PASSWORD

SECTION IV MANAGE ACCOUNTS

SECTION V SETTING USER PREFERENCES

SECTION VI NEW REQUEST

SECTION VII SEARCH FOR A REQUEST

SECTION VIII VERIFY ALIAS

SECTION IX REMEDY USER TOOL MAINTENANCE

CONTACT INFORMATION: REMEDYADMIN@SUPPORT.UH.EDU

TRAINING DOCUMENT CAN BE FOUND AT: [HTTP://REMEDY.UH.EDU](http://remedy.uh.edu)

CLICK ON MANUALS, THEN CLICK ON REMEDY: MANAGEMENT BASICS

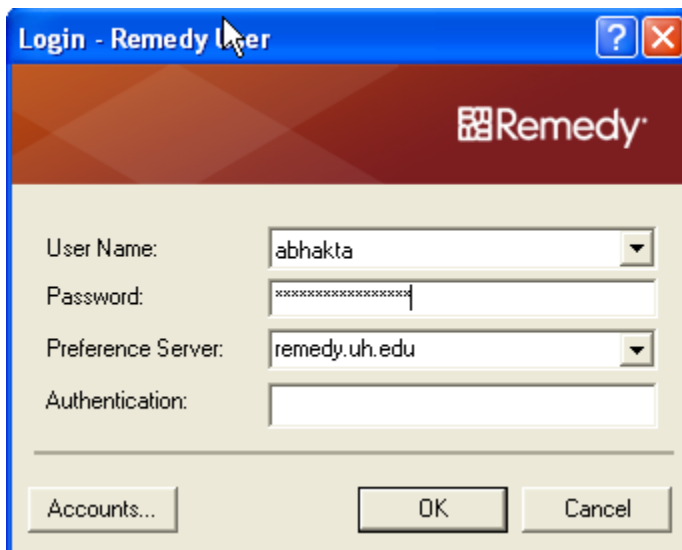
REMEDY: MANAGEMENT BASICS

The Remedy User Tool can be downloaded from <http://remedy.uh.edu>. We also have a web version of the tool and you can access the link from this same site by clicking “Connect to Web-based Remedy”.

If you are on an NT or XP machine, the user should be part of the Power User group as a minimum. Otherwise, Remedy will not allow access to certain screens.

SECTION I: LOGGING IN

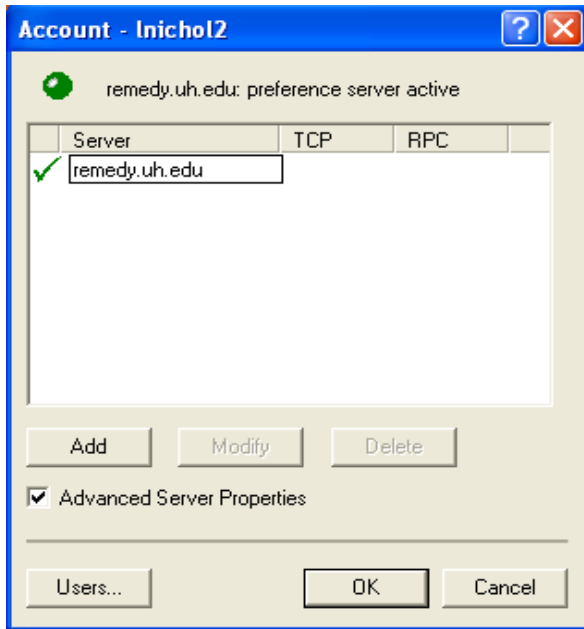
Once installed, you may login with your User Name and Password. Leave the Preference Server to (none) and Authentication field as blank. The Authentication field is used in conjunction with NT Domain logins, however, our server is a UNIX server and these capabilities do not exist in the UNIX environment. Therefore, always leave the Authentication field blank when logging into Remedy. We will discuss the Preference Server settings in Section V.



The screenshot shows a Windows-style dialog box titled "Login - Remedy User". The dialog has a red header bar with the Remedy logo. Below the header, there are four input fields: "User Name" (containing "abhakta"), "Password" (masked with asterisks), "Preference Server" (containing "remedy.uh.edu"), and "Authentication" (empty). At the bottom of the dialog, there are three buttons: "Accounts...", "OK", and "Cancel".

If you are on an NT or XP machine, the user should be part of the Power User group as a minimum. Otherwise, Remedy will not allow access to certain screens.

Our server name is “remedy.uh.edu” and this should be stated in the ‘Accounts’ screen and there should be a check mark next to the server name.



If you have trouble logging in, please contact the Remedy Support team at remedyadmin@support.uh.edu.
Once logged in, your ‘Management Home Page’ will automatically appear.

SECTION II: MANAGEMENT HOME PAGE

The 'Management Home Page' is used as a central console to access other screens in Remedy.

On this console are a number of links that will open different screens, and these links will be covered in this manual.

The two pull down menus, 'View by:' and 'List for:,' allows you to access listings of different queries. These queries give Management quick access to the types of cases that are outstanding based on 'Priority' or group.

Management Home Page

Quick Links

- [Change Remedy Pswd](#)
- [Manage Accounts](#)
- [New Request](#)
- [Search for Request](#)
- [Verify Alias](#)

Other

- [Reports](#)

IT Management Console

Manage Requests

View By: List For:

Assigned To	Request ID	Customer Na	Summary	Escalated?	Status	Priority	Assigned To

Bulletin Board

Create-date	Priority	Short-Description
10/23/2002 5:54:32 PM	High	Engineering printer 3 is down
10/23/2002 5:55:49 PM	High	Voicemail is not accessible in Dallas offic

This is an example of “Urgent” cases from the ‘View by:’ field.

Management Home Page

IT Management Console

Manage Requests

View By: **Urgent Requests** List For: []

Assigned To	Request ID	Customer Na	Summary	Escalated?	Status	Priority	Assigned To
ITSC - Chemi	HD0000000025093	Salvador Ba	Need IP addi	No	Assigned	Urgent	Salvador Baez
ITSC - Techni	HD00000000324771	Fred D Lewal	Information	Yes	Work In Prog	Urgent	Tom Jones
ITSC - Techni	HD00000000590746	William E Fitz	Email	Yes	Work In Prog	Urgent	Tom Jones
ITSC - Techni	HD00000000648143	Fred D Lewal	Voice Networ	Yes	Work In Prog	Urgent	vtjones
ITSC - Social	HD00000000653073	Sheara Willi	Desktop Sup	No	Work In Prog	Urgent	jdmathis

View Refresh

Bulletin Board

Create-date	Priority	Short-Description
10/23/2002 5:54:32 PM	High	Engineering printer 3 is down
10/23/2002 5:55:49 PM	High	Voicemail is not accessible in Dallas offic

View Create Delete Refresh

This is an example of open cases for the “ITSC – Help Desk” group.

Management Home Page

IT Management Console

Manage Requests

View By: **Urgent Requests** List For: **Open Help Desk Cases**

Assigned To	Request ID	Customer Na	Summary	Escalated?	Status	Priority	Assigned To
ITSC - Help	HD00000000620449	Marc Truitt	Network Con	Yes	Pending	Low	isdavis
ITSC - Help	HD00000000645308	Steven H N	Network Con	Yes	Assigned	Low	rkchance
ITSC - Help	HD00000000648069	Tamara E H	Information	Yes	Pending	Low	prodrigu
ITSC - Help	HD00000000649463	Rebecca A	Accounts	Yes	Pending	Low	jslewis
ITSC - Help	HD00000000649731	Paul Ellis	Email	No	Pending	Low	aram
ITSC - Help	HD00000000649805	Zeeshan Qui	Information	No	Work In Prog	Low	toogunde
ITSC - Help	HD00000000652215	Shirin Nanje	Accounts-W	No	Work In Prog	Low	ofarooq
ITSC - Help	HD00000000668431	Jose L Rodri	Email-Excha	No	Assigned	Low	slleger
ITSC - Help	HD00000000668989	Christopher	Email	No	Work In Prog	Low	itrichar
ITSC - Help	HD00000000669544	Piraye Bahm	Email	Yes	Pending	Low	itrichar
ITSC - Help	HD00000000670057	Allen Grundy	Accounts-W	No	Pending	Low	jslewis
ITSC - Help	HD00000000670891	Robert Bate	Accounts	Yes	Pending	Low	ilchps8

View Refresh

Bulletin Board

Create-date	Priority	Short-Description
10/23/2002 5:54:32 PM	High	Engineering printer 3 is down
10/23/2002 5:55:49 PM	High	Voicemail is not accessible in Dallas offic

View Create Delete Refresh

Management can also view cases of a specific individual by selecting “Requests Assigned To” from the ‘View by:’ field. To select the Remedy User, click the pull down menu in the ‘Assignee Name’ field.

Management Home Page

IT Management Console

Manage Requests

View By: **Requests Assigned To** List For: **Open Help Desk Cases**

Assigned To	Request ID	Priority	Assigned To
ITSC - Help	HD00000006	Low	isdavis
ITSC - Help	HD00000006	Low	rkchance
ITSC - Help	HD00000006	Low	prodrigu
ITSC - Help	HD00000006	Low	islewis
ITSC - Help	HD00000006	Low	aram
ITSC - Help	HD00000006	In Prog	toogunde
ITSC - Help	HD00000006	In Prog	ofarooq
ITSC - Help	HD00000006	Low	slieger
ITSC - Help	HD00000006	work In Prog	itrichar
ITSC - Help	HD0000000668383	Low	itrichar
ITSC - Help	HD0000000669544	Pending	islewis
ITSC - Help	HD0000000670057	Pending	itrichar
ITSC - Help	HD0000000670891	Pending	islewis
ITSC - Help	HD0000000670891	Low	itrichar

Bulletin Board

Create-date	Priority	Short-Description
10/23/2002 5:54:32 PM	High	Engineering printer 3 is down
10/23/2002 5:55:49 PM	High	Voicemail is not accessible in Dallas offic

Please note that some user names in the ‘Assignee Name’ listings are used for automated processes.

SECTION III: CHANGE REMEDY PASSWORD

Management Home Page

IT Management Console

Quick Links

- [Change Remedy Pswd](#)
- [Manage Accounts](#)
- [New Request](#)
- [Search for Request](#)
- [Verify Alias](#)
- Other**
- [Reports](#)

Manage Requests

View By: List For:

Assigned To	Request ID	Customer Na	Summary	Escalated?	Status	Priority	Assigned To

Bulletin Board

Create-date	Priority	Short-Description
10/23/2002 5:54:32 PM	High	Engineering printer 3 is down
10/23/2002 5:55:49 PM	High	Voicemail is not accessible in Dallas office

To change your Remedy account's password, click the 'Change Remedy Pswd' link from the 'IT Management Console.' You should see the following screen.

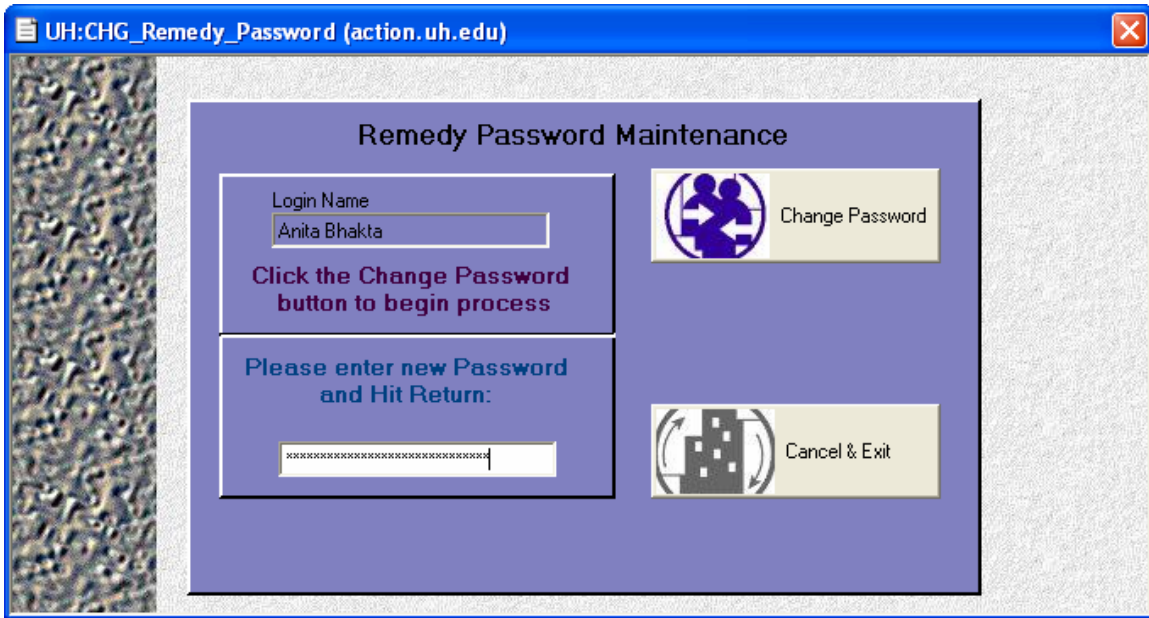
UH:CHG_Remeddy_Password (action.uh.edu)

Remedy Password Maintenance

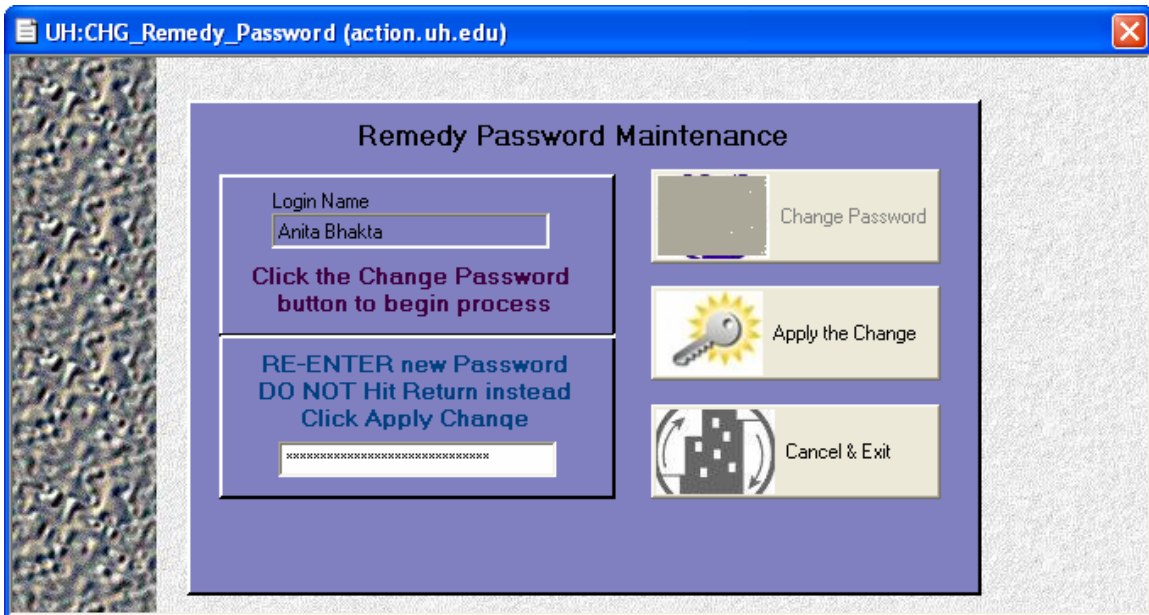
Login Name
Anita Bhakta

Click the Change Password button to begin process

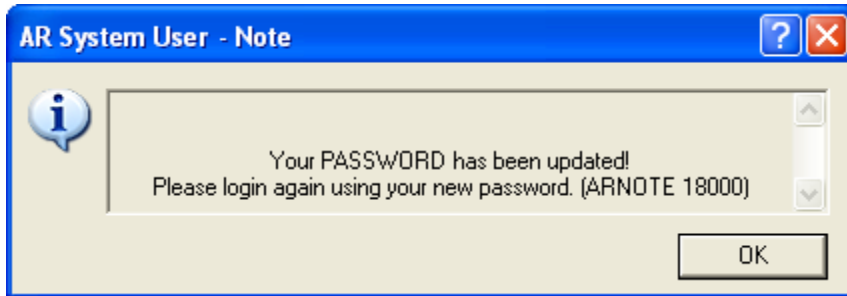
Click the 'Change Password' button and read all instructions.



You must delete what is in the password field and then type your new password and make sure to hit enter. Password is case sensitive.



After you hit enter, YOU MUST delete the password again and RE-ENTER the same password THEN click the 'Apply the Change' button.



If both passwords entered matches, you will receive the above message. The password change takes effect immediately and therefore it is imperative to re-login right away to continue your work. If you do not re-login after changing your password, you will receive errors and not be able to access Remedy screens.

SECTION IV: MANAGE ACCOUNTS

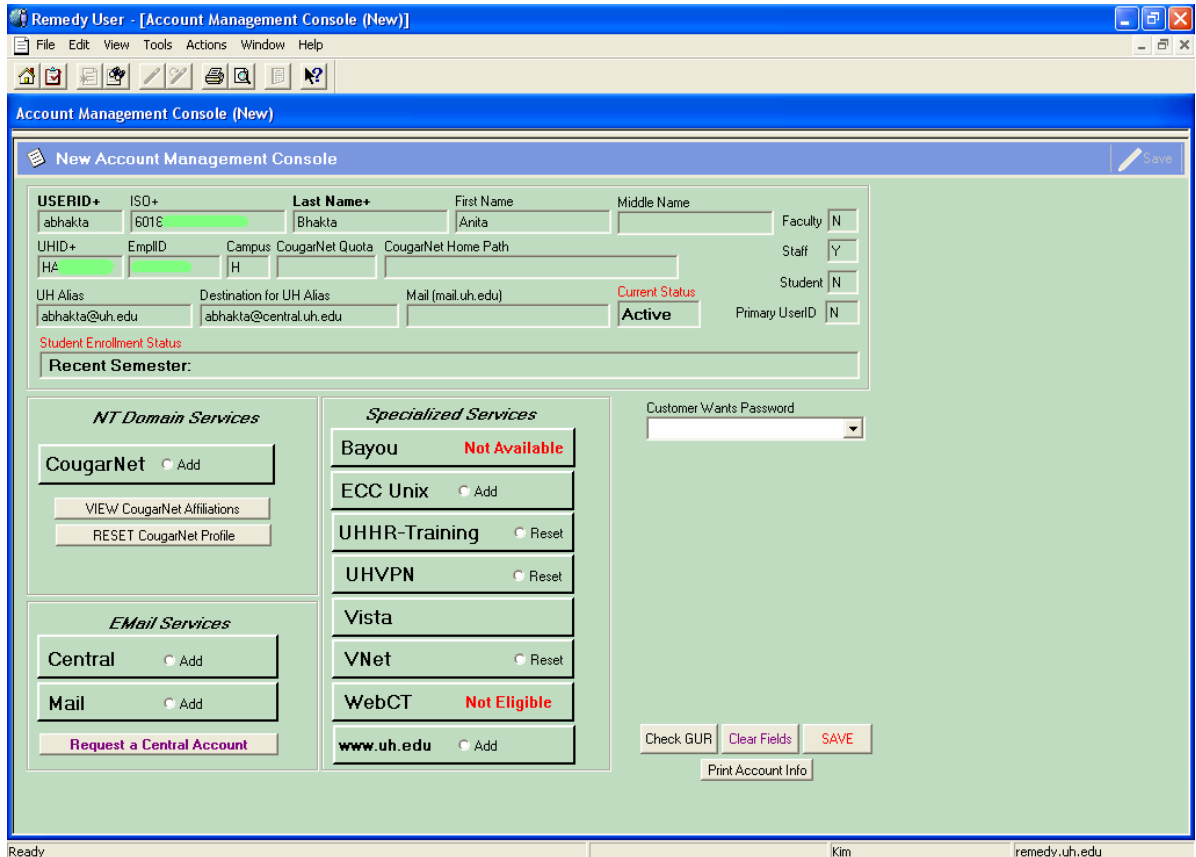
From the 'Management Home Page', click 'Manage Accounts' to get to the 'Account Management Console' screen. There are two major functions for the 'Account Management Console' (AMC):

- Add Resources
- Reset Passwords for Resources

Other functions are available for privileged Remedy Users, which will not be covered in this manual.

Add Resources:

You must first query the customer via 'UserID,' 'ISO' number, 'UHID,' or 'Last Name.' Once the 'UserID' has been queried, all relevant information will be filled in. Click the 'Add' radial button(s) for the resource(s) the customer is requesting and then click 'Save' button in the lower right hand corner. In this example, the Mail, www.uh.edu, and Ecc_Unix resources are being added. If the account is disabled, it will read 'Acct Disabled' in red. If there is no Bayou account, it will read 'Not Available' in red. If there is no Vista or WebCT account, it will read 'Not Eligible' in red.



Reset Password for Resource(s):

To reset the password,

1. Query the customer information on the Account Management Console screen.
2. Click the 'Reset' radial button for the appropriate account.
3. Click on the 'Customer Wants Password' field.
4. Select the method of how the customer would like to receive their new password.
 - Printed – will allow a printout with the customer's account information and partial password. Important: once the page is printed, return to the AMC screen and click the 'Save' button to send the request.
 - Told Via Telephone – provide the partial password on the AMC screen.
 - Emailed To Alias – an email will be sent to the customer's alias.

NOTE 1: Partial passwords provided for "Printed" and "Told Via Telephone". The customer will need to add their two digit year of birth to the end of what is provided for the complete password. Complete password will be emailed to alias.

NOTE 2: A selection *MUST* be made. If not, an error message will appear when attempting to click the 'Save' button.

5. Click 'Save' in the lower right hand corner. In the example below, the UHVPN and VNet resource passwords are being reset.

The screenshot displays the 'New Account Management Console' interface. At the top, there's a menu bar with 'File', 'Edit', 'View', 'Tools', 'Actions', 'Window', and 'Help'. Below the menu, the account details for user 'abhakta' are shown, including fields for USERID, ISO, Last Name, First Name, Middle Name, Faculty, UHID, EmpID, Campus, CougarNet Quota, CougarNet Home Path, Staff, Student, UH Alias, Destination for UH Alias, Mail, Current Status (Active), and Primary UserID. The 'Customer Wants Password' dropdown menu is open, showing options: 'Printed', 'Told Via Telephone', 'Emailed to Alias', and '(clear)'. The 'UHVPN' and 'VNet' services are selected for reset. The 'SAVE' button is highlighted in red.

If the customer has Sponsored Account(s), then all 'Add' radial buttons will be hidden and the 'Reset' buttons will only show for the resources the customer has access to. Therefore, you will be able to reset the password for the systems or resources that this customer already has access to. The 'Add' radial buttons are hidden because all Sponsored Account customers must receive permission from their sponsor before having any other resources added. This may involve the customer having to fill out additional Sponsored Account forms, depending on the resource requested. Please check with the Sponsored Account team for further questions.

Examples of how the customer would like to receive their new password:

Printed:

Click on the printer button in the toolbar at the top of the screen.

Remedy User - [UH:AccountPrintOut (New)]

File Edit View Tools Actions Window Help

Home Recent Documents Print Search Help

UH:AccountPrintOut (New)

New UH:AccountPrintOut Save

IT SUPPORT CENTER ONLINE PASSWORD RESET UH Account Information

E-Mail Alias	E-Mail Account	User Name
kamoody@uh.edu	kamoody@central.uh.edu	kamoody

Last Name: Moody
 First Name: Kimberly
 Middle Name: A

Bayou	Ecc_Unix	Mail	WebCT CE	WebCT Vista	UHVPN	VNet	www.uh.edu
Active	InActive	Active	InActive	InActive	Active	Active	Active

CougarNet (Domain): Active
 Home Path if CougarNet Active: \\CougarNet.uh.edu\root\Home18\kamoody
 CougarNet Quota: 200

This password plus your Two-Digit Year of Birth (YY from MMDD19YY)

Systems that are labeled "Active" are your current accounts. All accounts will take 30 minutes to one hour to process from the timestamp of this print out.

[Email Instructions](#)
 [WebCT Instructions](#)
 [E-Mail & WebCT Instructions](#)
 [Clear Instructions](#)

E-Mail Account

To access your email (you need to have an internet provider):

1. Type url: http://mail.uh.edu in the address field, hit return key
2. Click Log On
3. A pop up window will ask for your:
 - a. User Name: kamoody
 - b. Password: (birthdate in the format of MMDDYYYY)
4. Click OK.

To change your password:

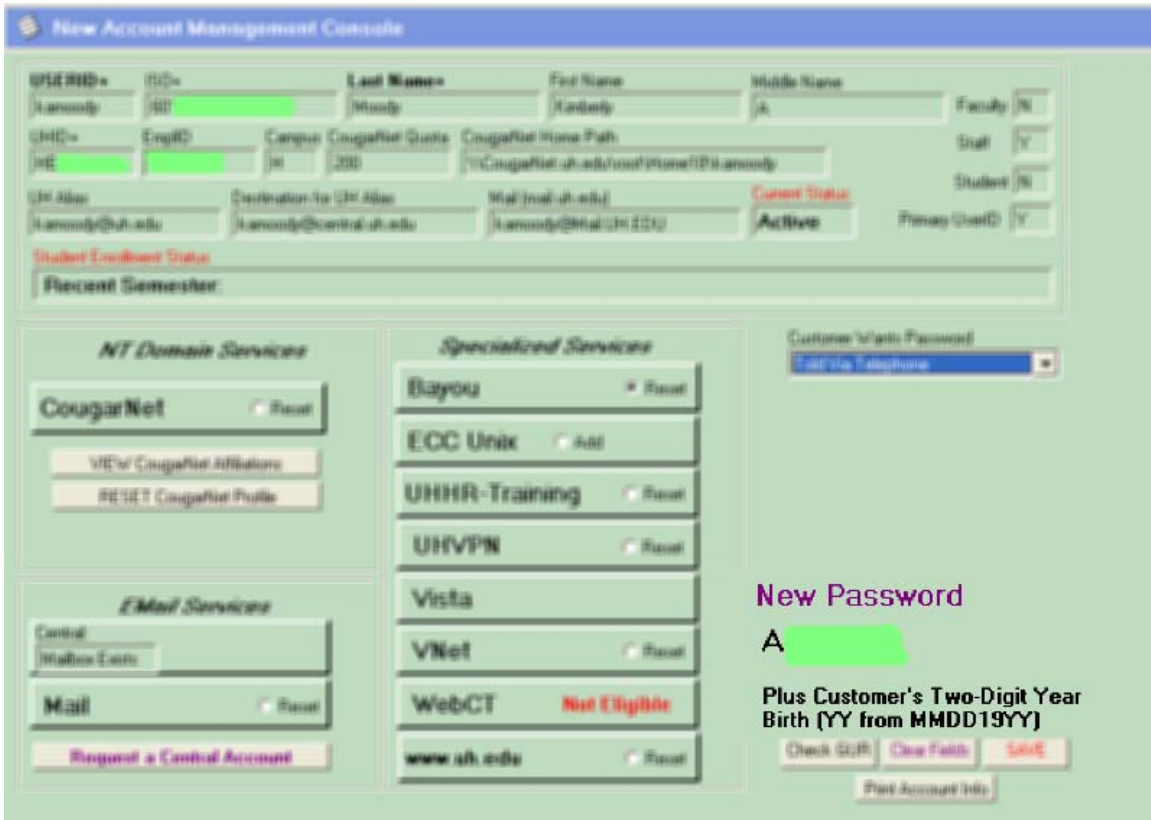
1. Logon to your account (as steps 1-4 above)
2. Click the [Printout](#) how

1 entries returned - 1 entries matched Kim remedy.uh.edu

Remember: Once the page is printed, return to the AMC screen and click the 'Save' button. Only then will the request to reset be completed.

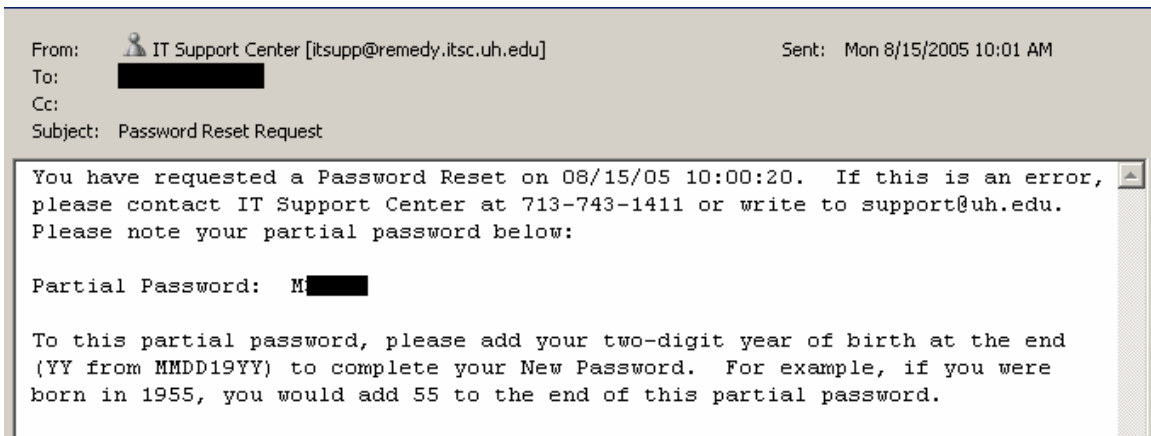
Told Via Telephone:

Partial password is located at the bottom right of the AMC (above the 'Save' button).



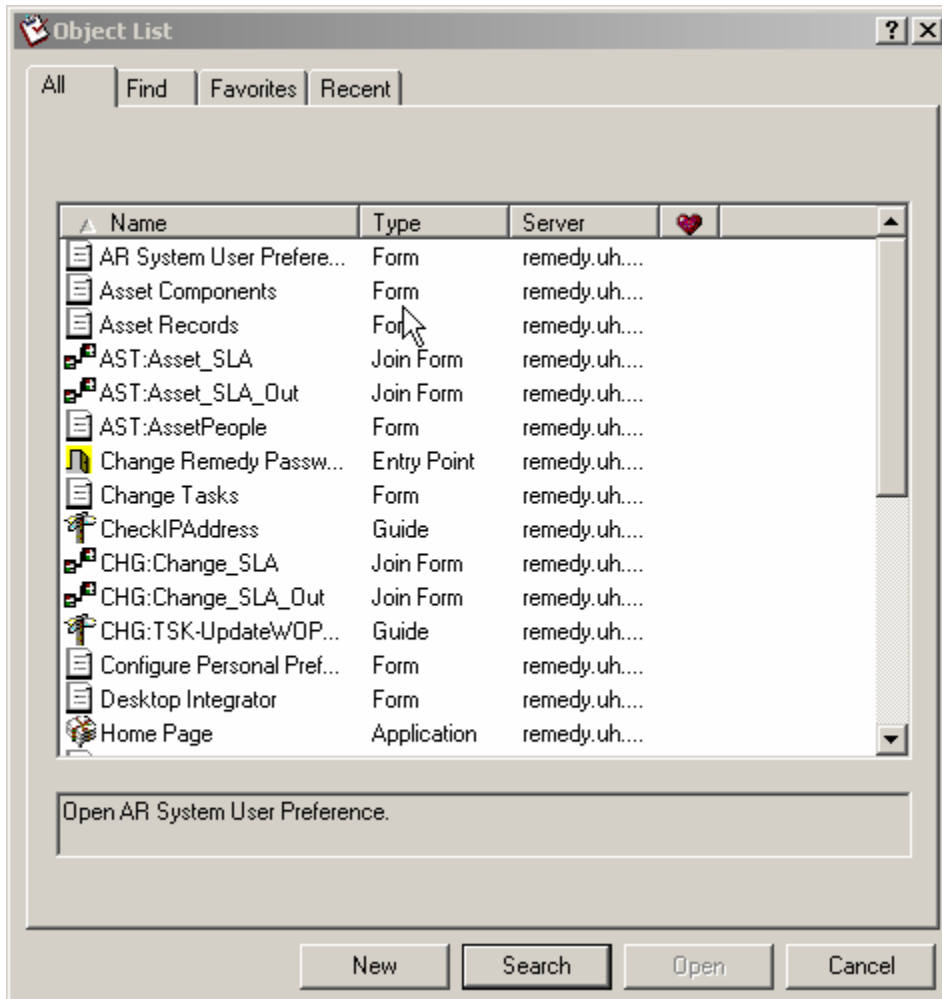
Emailed To Alias:

The password *does not* appear on the AMC screen. An email is sent directly to the customer.



SECTION V: SETTING USER PREFERENCES

The purpose of setting your user preferences is so that your preferences can travel with you as you go from computer to computer. Thus, if you have favorites setup on your work computer, then you can access the same favorites should you login to another machine, such as your home machine. To set your user preferences, go to 'File' and select 'Open,' then 'Object Lists.'



Select the 'AR System User Preference' form and click the 'New' button.

Modify AR System User Preference 000000000000236

Login Name: bhakta **Create Date:** 5/25/2005 3:40:45 PM **Request ID:** 000000000000236
Short Description: Preference entry for bhakta **Modified Date:** 6/27/2005 5:48:10 PM **Assigned To:**
Last Modified By: bhakta

Status: New Assigned Fixed Rejected Closed

General | Display | Color | Confirmation | Report | Logging | Locale | File | Advanced | Home Page | Alert | Recent | Edit | Window | Misc | Web

Application

- On Startup: Maximize AR System User No Yes
- On Exit: Save Window Workspace No Yes
- Server: Server Login List: **Advanced Server Option:** No Yes
- Search Path: C:\Program **Num Item in Recently Used List:** 5

Form

- On New: Set Fields to Default Values
- Diary Field: Show Most Recent First Yes
- On Search: Clear All Fields
- Field Menu: Display As: Popup menus
- Show Result List Only: No Yes
- Expand at Startup: No Yes
- Limit Number of Items Returned: 1000
- Pane Layout: Top
- On Open: Show Advanced Search Bar: No Yes
- Maximize Window: No Yes
- Flat Look On Forms: No Yes

You can go through each tab and fill out the preference of your choice and click the 'Save' button. You only need to setup your preferences one time. Most are self-explanatory. If you require assistance, please contact remedyadmin@support.uh.edu.

Once you have set your preferences, the next time you login, you can specify remedy.uh.edu as the preference server.

Login - Remedy User

User Name: abhakta

Password:

Preference Server: remedy.uh.edu

Authentication:

Accounts... **OK** **Cancel**

SECTION VI: NEW REQUEST

From the 'IT Management Console', click the 'New Request' to open the 'New Help Desk Case' screen.

The screenshot shows the 'New Help Desk Case' form. The form is titled 'TSS Help Desk' and has a blue header bar with the text 'New Help Desk Case'. The form is divided into several sections:

- Customer Information:** Fields for Last Name+, First Name, Middle Name, ISD+, UHID+, and Urgency (set to Low).
- Requester Information:** Fields for Summary, Type, and Item.
- AMC (Account Management Console):** Fields for Primary UserID, Customer Status, CougarNet Home Path, and CN Quota.
- Status Summary:** A text field with a dropdown arrow.
- General Tab:** Includes a Description field, Case ID+ (set to HD), Source (set to Phone), Priority (set to Low), and Case Type (set to Problem).
- RightNow Ticket Link:** A text field with a dropdown arrow.
- Requester's Closed Cases:** A table with columns Case ID+, Summary, Status, and Category. The table is empty and has a 'Click to Refresh' button.
- Requester's Open Cases:** A table with columns Case ID+, Summary, Status, and Category. The table is empty and has a 'Click to Refresh' button.

At the bottom right of the form, there is a 'WebCT Courses' link and a 'Close' button.

Enter the 'Last Name' or any field with a + of customer information and hit return. Select the individual from the listing, if applicable.

The screenshot shows the 'New Help Desk Case' form in Remedy. The form is titled 'TSS Help Desk' and includes the following fields and sections:

- Form Fields:** Last Name+ (Bhakta), ISO+, UHID+, Urgency (Low), Status Summary, Priority (Low), Case Type (Problem).
- Selection List:** A dialog box showing a list of names with 'Bhakta Anita' selected. The list includes: Bhakta Amit, Bhakta Anantkumar, Bhakta Anish, Bhakta Anita, Bhakta Anjana, Bhakta Ankit, Bhakta Ankita, Bhakta Ankur, Bhakta Ashish, Bhakta Atit, Bhakta Axay, Bhakta Bhauin, Bhakta Divyesh, Bhakta Jatin, Bhakta Jigna.
- Form Tabs:** General, Activity, Requester Information, Solution.
- Description:** A large text area for the case description.
- RightNow Ticket Link:** A field for linking to a RightNow ticket.
- Requester's Closed Cases:** A table with columns Case ID+, Summary, Status, and a 'Click to Refresh' button.
- Requester's Open Cases:** A table with columns Case ID+, Summary, Status, Category, and a 'Click to Refresh' button.
- Buttons:** Save, OK, Cancel.
- Other:** AMC logo, Primary UserID, Customer ID, CN Quota, HD, Priority, Case Type, WebCT link.

You must start by selecting the 'Summary' first and then fill out the rest of the form. Also, verify and update information within the Requester Information tab. Update the customer's Profile when needed. Since office visits are sometimes needed, it is a good idea to update the building and room number of the customer also.

Help Desk Case (New)

New Help Desk Case Save

TSS Help Desk

Last Name+ First Name Middle Name

ISO+ Summary

UHID+ Type

Urgency Item

AMC Primary UserID: **bhakta** Customer Status: **Active** CougarNet Home Path: **\\cougarnet.uh.edu\root\home1\bhakta** CN Quota: **200**

Status Summary

General | Activity | Requester Information | Solutions | Specifics | CTS-ITAC

Description

Case ID+

Source Priority Case Type

RightNow Ticket Link

Requester's Closed Cases

Case ID+	Summary	Status
Click to Refresh		

Requester's Open Cases

Case ID+	Summary	Status	Category
Click to Refresh			

[WebCT](#)

Once pertinent information is taken on the case, click the 'Save' button in the upper right hand corner.

SECTION VII: SEARCH FOR A REQUEST

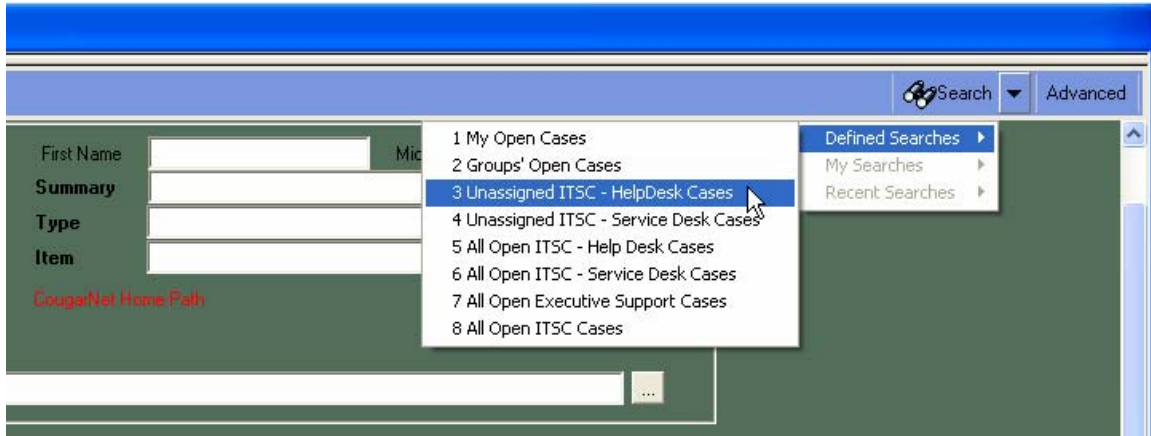
From the 'IT Management Console', click the 'Search for Request'. Most common way to perform a search is via the 'Case ID'. You do not need to enter the leading zeros or the 'HD' for the 'Case ID'. You may just enter the digits or the complete 'Case ID' and then hit the enter key to query the case. 'Case ID' is the only field you can search with the enter key, all other fields you have to click the 'Search' button on the upper right hand corner.

If you do not have the 'Case ID', then enter the 'Last Name' or 'ISO' number in their respective fields and click the 'Search' button in the upper right hand corner. You can also perform some complex searches by using the 'Advanced Search' button located in the upper right hand corner. Here is an example of a query that can be placed in the 'Search Criteria:'

This query will obtain all cases which are open with the ‘Source’ set to “RightNow,” ‘Urgency’ set to “Urgent,” ‘Last Name’ set to “Bhakta” and ‘Status’ < “Resolved” in the Advanced ‘Search Criteria’.

As you can see, the more complex your query is, the narrower is your results list.

Common complex queries can be found in the pull down menu under the 'Search' button in the upper right corner. Under the 'Defined Searches' selection, you can see the various search listings that may be commonly used.

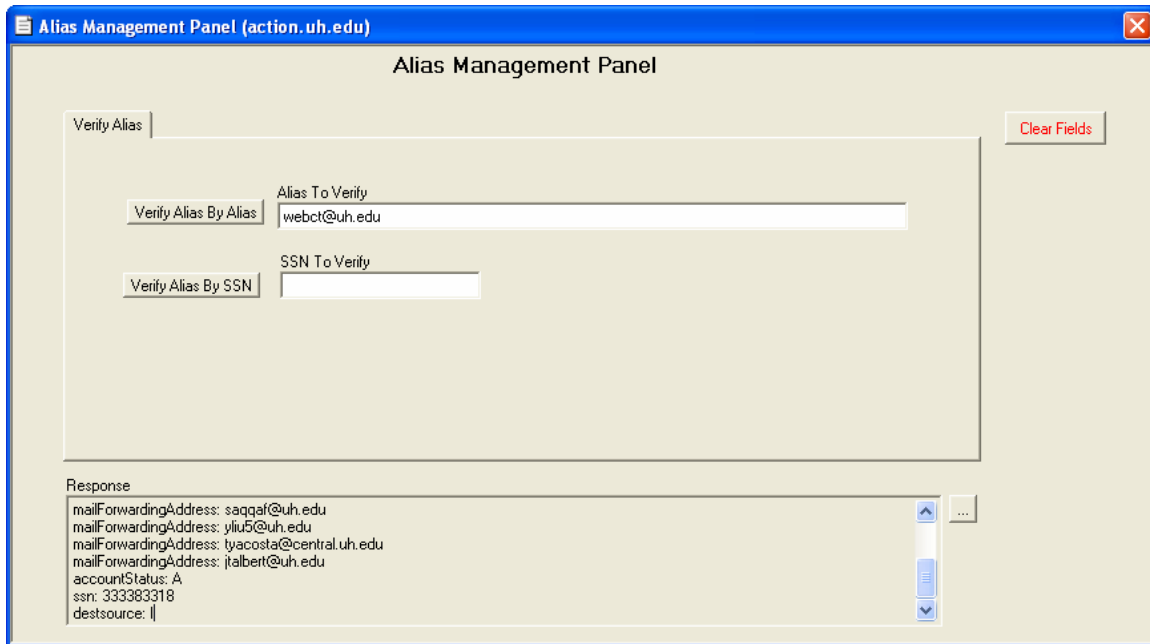


To update this listing, please contact RemedyAdmin@Support.UH.EDU.

SECTION VIII: VERIFY ALIAS

To verify if an alias exists or what e-mail address(es) the alias is pointing to, click the 'Verify Alias' link from the 'IT Management Console.'

You may check the alias based on SSN or the '@uh.edu' alias. Please select the appropriate button respectively.

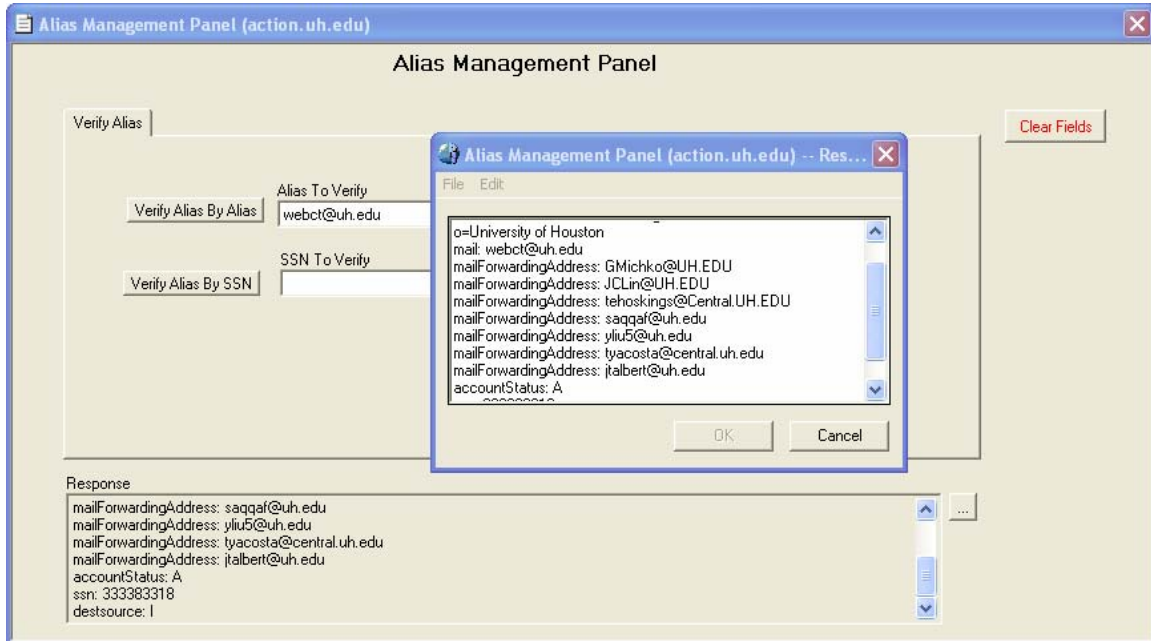


The screenshot shows a web browser window titled "Alias Management Panel (action.uh.edu)". The main content area is titled "Alias Management Panel" and contains a "Verify Alias" section. This section has two options: "Verify Alias By Alias" and "Verify Alias By SSN". The "Verify Alias By Alias" option is selected, and the "Alias To Verify" field contains the text "webct@uh.edu". The "Verify Alias By SSN" option is also present, with an empty "SSN To Verify" field. A "Clear Fields" button is located in the top right corner of the form area. Below the form is a "Response" field, which is currently expanded to show the following LDAP search results:

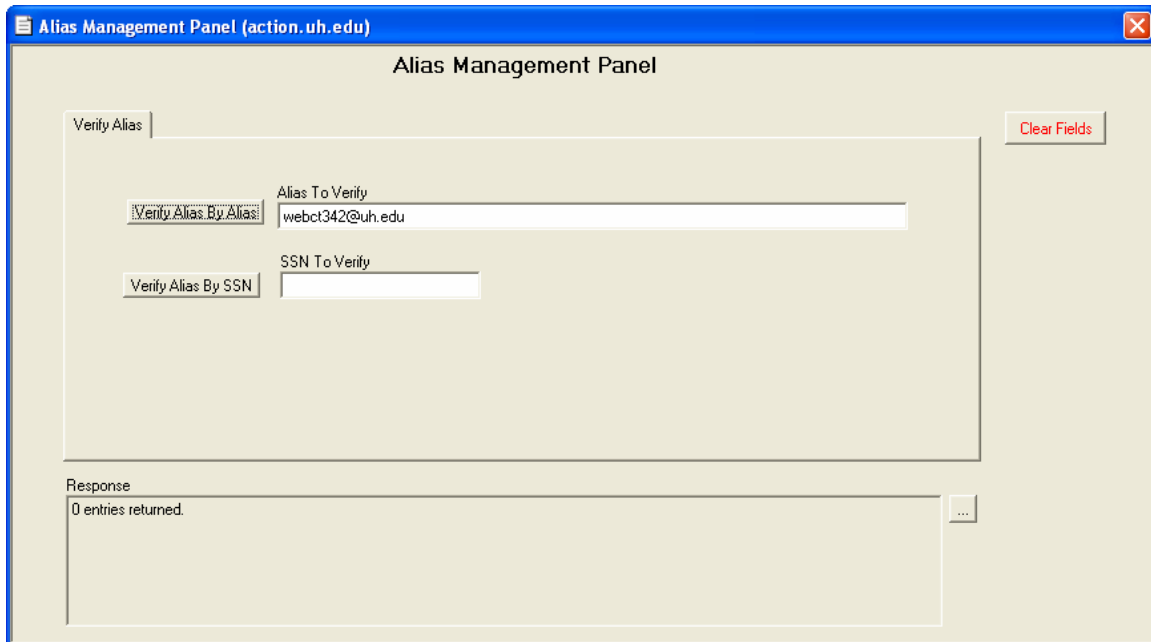
```
mailForwardingAddress: saqqaf@uh.edu
mailForwardingAddress: yliu5@uh.edu
mailForwardingAddress: tyacosta@central.uh.edu
mailForwardingAddress: jtalbert@uh.edu
accountStatus: A
ssn: 333383318
destsource: |
```

The 'Response' button will capture the output from the LDAP server, so you do have to open the box to see the complete entry in the 'Response' field.

Click on the box with three dots next to the 'Response' field to open the field box.



If the alias does not exist, you will receive the following message in the 'Response' field.



SECTION IX: REMEDY USER TOOL MAINTENANCE CLEARING OUT THE ARF AND ARV FILES

Purpose:

These files cache the current view of a form. Clearing out these files periodically will insure that the next time a form is accessed the most current configuration of that form is presented. This is especially important during times of heavy development on a form.

Procedure:

- (1) In Remedy, go to **Tools > Account...**
- (2) Click on the **Users...** button
- (3) Locate your Username and note the location of your Home directory. (That column does expand out) – Figure 1

NOTE: For a PC with a single Remedy User, your User will be listed as Default User, unless a User has been added.

- (4) Logout/Close Remedy User Tool

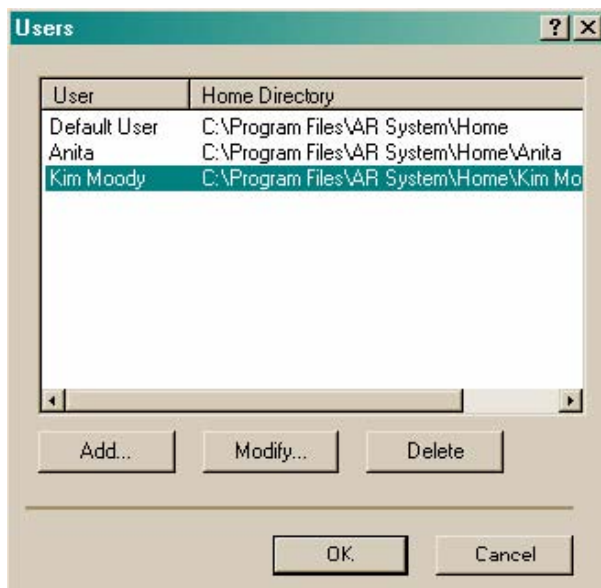


Figure 1: Remedy Users List

Example - C:\Program Files\AR System\Home\Kim Moody

- (5) In Windows, go to **Start > My Computer**
- (6) Select the Disk indicated in the Home Directory.
For example, C: is being used by the Home Directory.
- (7) Open the folders in the path of the Home directory as shown in the Remedy Users List. For example:
Program Files > AR System > Home
Program Files > AR System > Home > Kim Moody
- (8) Delete all the folders. **EXCEPT ARCmDs. DO NOT delete the files** – only the folders.
- (9) Log back into Remedy User Tool.

If there are further issues in bringing the up form, contact Remedy Administration at RemedyAdmin@Support.UH.EDU.