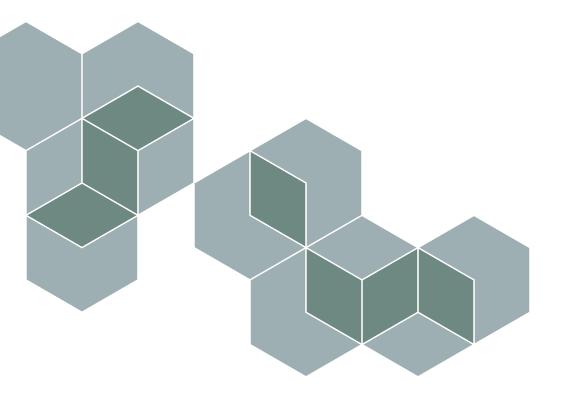
# Remedy Help Desk 5.5 User's Guide





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This edition applies to version 5.5 of the licensed program.

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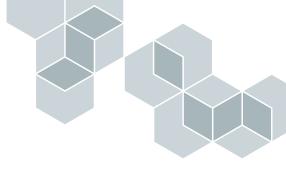
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# Preface

The *Remedy Help Desk 5.5 User's Guide* describes how to use the Remedy<sup>®</sup> Help Desk 5.5 application. Remedy Help Desk is one of four Remedy IT Service Management applications. The others are Remedy<sup>®</sup> Asset Management, Remedy<sup>®</sup> Change Management, and Remedy<sup>®</sup> Service Level Agreements.

Remedy Help Desk provides IT (information technology) organizations with the ability to submit, monitor, and manage help desk cases, change requests, and asset inventory records.

## Audience

This guide is intended for the requesters who use Remedy Help Desk to request assistance or services, the IT professionals who use Remedy Help Desk to respond to those requests, and the managers who oversee the operations of the IT organization. More specifically, IT professionals include:

- Frontline and backline support technicians, who use the application to create new requests for help or services.
- Support staff and managers, who use the application to resolve help desk cases and change requests; create asset records; and view relationships among help desk cases, change requests, and asset records in a networked environment.
- Managers, who monitor the daily operations of the IT organization, and use the application to track the support staff's performance on resolving help desk cases, and manage requests that are escalated, or requests to be reassigned.

# **Related Remedy documents**

Title and Part Number	Description	Audience	Format
Remedy Change Management User's Guide CM-550-UG-01	Procedures for using the Remedy Change Management application; includes new features overview.	Everyone	PDF
Remedy Asset Management User's Guide AM-550-UG-01	Procedures for using the Remedy Asset Management application; includes new features overview.	Everyone	PDF
Remedy Service Level Agreements User's Guide SLA-550-UG-01	Procedures for using the Remedy Service Level Agreements application; includes new features overview.	Everyone	PDF
Remedy Approval Server Guide for User and Administrators ARAS-510-UAG-01	Procedures for installing and administering the Approval Server, connecting an AR System system application to the Approval Server, setting up approval processes and rules, and approving requests.	Everyone	PDF
Remedy IT Service Management Installation and Configuration Guide ITSM-550-ICG-01	Procedures for installing and configuring the four Remedy IT Service Management applications: Help Desk, Change Management, Asset Management, and Service Level Agreements.	Administrators	Print and PDF
Remedy IT Service Management Online Help	Procedures for using the Remedy Help Desk, Change Management, Asset Management, Service Level Agreements, nd Configuration Manager.	Everyone	Help link
Action Request System Concepts Guide AR-510-CNTG-01	Overview of the AR System architecture and features with in- depth examples; includes information about other Remedy products.	Everyone	Print and PDF



Title and Part Number	Description	Audience	Format
Remedy Help Desk Data Migration Version 5.0 to 5.5	Provides the steps necessary for the complete migration of data from Remedy Help Desk 5.0 to Remedy Help Desk 5.5. Available online from the Remedy Customer Support web site (http://supportweb. remedy.com).	Administrators	PDF
Section 508 Compliance for Remedy IT Service Management Suite, Version 5.5 - White Paper	Provides information about compliance with Section 508 for Remedy IT Service Management, version 5.5. Available online from the Remedy Customer Support web site (http://supportweb. remedy.com).	Everyone	PDF
Online documentation is avail tion CDs, or on the Remedy C	able in Adobe Acrobat (PDF) form: Customer Support web site.	at on Remedy prod	luct installa-

Remedy Help Desk 5.5



Chapter



# Introducing Remedy Help Desk

The following topics introduce you to the Remedy Help Desk application and to the business model on which it is based.

- "About Remedy Help Desk" on page 14
- "What's New in Remedy Help Desk" on page 15
- "Remedy Help Desk business models" on page 16
- "Using Remedy Help Desk" on page 19
- "Other Remedy applications" on page 23

# **About Remedy Help Desk**

Remedy Help Desk is based on user roles. This means that, for your role in the organization—requester, support, or management—you will work with the appropriate view on your desktop.

- Remedy Help Desk takes advantage of new and enhanced features in the AR System User Tool, and has an improved user interface.
- The primary interface for Remedy Help Desk is the Remedy IT Service Management Console. The Remedy IT Service Management Console works like a control panel, from which users can perform their primary tasks, based on their role.
- Comprehensive online help is available for both Windows and web versions of Remedy Help Desk. Help can be accessed by clicking on the help link from the console or from any form.
- The Remedy IT Service Management Console provides an Assigned Requests table, from which support staff can view and access assigned requests.
- Support staff and managers can customize their module's actions in the Personal Preferences dialog box. For example, they can specify what form appears when they begin creating a request.
- Requests are assigned based on skills, location, and availability specified by the application administrator in the configuration settings of the Remedy Configuration Manager.
- Support staff can handle special requests from VIP customers.
- Managers can capture the time spent on a request with more flexibility.
- The Remedy Help Desk application integrates with third-party paging software for pager notifications, specified by the application administrator in the Remedy Configuration Manager.
- Support staff and managers can create and send bulletin board notifications to a group or organization.
- Support staff and managers can print quick reports of the information in a form (for example, data from a help desk case).
- Support staff and managers can generate more than 100 predefined reports on help desk cases, change requests, and asset records and view them with the built-in Crystal Reports viewer.
- Support staff can remotely diagnose problems using integrator software.

# What's New in Remedy Help Desk

The new version of Remedy Help Desk offers web views for the Remedy Requester, Support, and Manager roles. All of the functionality available in the native client is now available in the web client.

Several important new features are also included in this version:

- Problem Management functionality—Help desk cases are now classified as incidents by default, with improved workflow and tracking of the problem management process.
- Automatic reassignment—Support staff can now choose to have help desk cases automatically reassigned to the appropriate staff when the Category, Type, or Item for a case is modified.
- Work Order—Provides the ability to record and track work contracted to outside departments to third-party organizations through an optional tab on the Change Task Information form.
- **Print on Demand**—Requesters can print the details of a request by clicking a Print button on the case form.
- Web Services—Administrators can create, query, or modify help desk cases, search for or modify a person's record, and query or modify work order information in a change task form using an external application and an AR System web service published on the Internet or a corporate intranet.
- Service categorization field—A new Service field is available, which administrators can configure to provide a predefined a list of service types. Reports can be generated based on these service types.
- Filtered Bulletin Board—Bulletin Board items can now be directed to specific areas in an organization.
- Enhanced searching by category, type, and item—Searches can now be performed in the Problem Management tab by category, type, and item for any help desk case.
- Modification of Submitted By field—Users can enter the name of the person submitting the request if this is different from the requester. This provides the submitter with permissions to modify the request.



- Viewing of requester's closed cases—A requester's closed cases can now be viewed going back six months.
- User information in Change Task Information form—User profiles can be viewed from within the Change Task Information form.
- Multiple asset users, managers, and owners—Multiple users, managers, and owners can now be assigned to an asset record in the Asset Inventory module.

## **Remedy Help Desk business models**

The Remedy Help Desk application assumes certain IT organization business models. These business models define roles and describe the functions for each of these roles.

While no two IT organizations are structured or operated exactly alike, most have basic functions and responsibilities in common. The overall mission of every IT organization is to resolve issues and respond to requests for information or service. The site-specific tasks and processes that support this mission are distributed among functional areas of the organization. Each functional area has support staff members who are assigned various responsibilities in their organization.

In addition to typical help desk case-tracking activities, the Remedy Help Desk business models include change request and asset inventory activities. The manager's role in supervising the IT operation includes support staff's performance on help desk cases. Managers also can determine how resources are allocated across the entire organization.

### **Requester role**

Requesters who need technical support can contact the support organization by telephone, email, and by submitting requests directly into the Remedy Help Desk application on their desktops through either the Windows client or the web.

Requesters can also request services that are planned by support staff.



Requesters provide the IT support staff with information it needs to resolve a help desk case or to fulfill a change request. After a case or request is resolved, the requester automatically receives notification from the support staff with details of the resolution.

## Support role

Support staff members provide services to their customers, such as helping to resolve problems and implementing change requests. To do this, support staff members work with help desk cases and change requests. When a person or group is assigned to a help desk case or a change request, a member of the support staff accepts responsibility for the help desk case or change request until it is either resolved or reassigned.

As support staff members work on help desk cases and change requests, they can access asset inventory information that enables them to resolve help desk cases and change requests. For example, a support staff member might need a user's asset configuration information to help troubleshoot the user's issue. The staff member can verify when an asset was last updated. This information might be applicable to the cause for the case.

As a support staff member, you can perform the following tasks:

- Create requests for a requester.
- Look up potential solutions to a problem.
- Create solutions for the database. Requesters can view these solutions and apply them if they want to resolve their own cases.
- Track duplicate help desk cases.
- Track requester information.
- Create and send reminder messages to people at specific intervals.
- Create Bulletin Board messages and send notifications to support staff.
- View your assigned requests, or requests assigned to a group of which you are a member and no support individual has accepted responsibility.
- Search for other requests.
- Relate help desk cases, change requests, and asset records.
- View reports.
- Use Problem Management to relate incidents to cases designated as problems.



## Manager role

Managers oversee the operation of the IT organization. This role includes performing daily management activities (such as handling escalations and approving solutions) and tracking performance measurements for support staff, based on requesters' completed surveys.

Managers can run reports on help desk cases, on change requests and tasks, and asset inventory records. These reports enable them to plan resources and to identify trends in the types of upcoming cases, change requests and tasks, and asset records that warrant further investigation.

## **Administrator role**

The application administrator oversees the operation of the Remedy Help Desk application and all of its modules. Administrators have full and unlimited access to the application and are responsible for configuring data in applications to contain custom entries such as:

- Categorizations
- Locations
- People
- Groups
- Skills

For information about the administrator's role and tasks, see the *Remedy IT Service Management Installation and Configuration Guide*.

# **Using Remedy Help Desk**

The Remedy Help Desk application automates the IT organization business model. Each module takes full advantage of the features of AR System User Tool and implements workflow and reporting mechanisms to simplify your management activities. Additionally, Remedy Help Desk includes a set of predefined reports that provide information about support staff activities.

The following sections describe the activities you can perform with the three modules within each role.

## Help Desk module

The Help Desk module provides the following case tracking capabilities:

- Case submission from various sources—All users can submit cases by telephone, email, browser, AR System User Tool, or integrated network management platforms.
- Three-tiered case categorization—Categorization menus enable support staff to quickly describe the case category, type, and item of a help desk case.
- Relationships across modules—Support staff can relate other cases, change requests, and asset inventory records to a help desk case.
- Lookup of potential solutions—Support staff can look up available solutions based on keyword matches of similar summary fields. Requesters can look up potential solutions based on case categorization, and in some cases, may be able to resolve the request themselves.
- Creation of solutions—Support staff can create solutions for inclusion in the solutions database.
- Duplicate case tracking—Support staff can associate multiple instances to a single case and tie the resolution of multiple cases to the resolution of one case.
- **Requester information tracking**—Support staff have access to people records, which enables them to create or modify requester information when they work with a help desk case.
- Tracking time spent on a case—Managers can monitor the amount of time spent by support staff on a case by reviewing the information in the Total Time Spent field.



- Reminder messages—Support staff can define messages to be sent to groups or people at specific intervals over the life of a case.
- Escalations—Conditions for escalating help desk cases are monitored on a regular basis, and escalation actions are performed, such as sending a reminder to the support staff member's manager. The Help Desk module has eight predefined escalations for urgent, high, medium, and low priority cases (two for each priority type).
- Group and individual assignments—Support staff groups or members are automatically assigned to work on help desk cases.
- Case reassignments—Support staff groups or members can reassign cases, or ask managers to reassign them. When the Category, Type, or Item information changes for a case, the support staff assigned to the case can choose to have the case reassigned automatically to another support staff member with expertise in the specified areas.
- Customer satisfaction survey—When a help desk case is closed, the requester is prompted to complete a customer satisfaction survey. Managers can use the results of this survey and the support staff's performance metrics to evaluate how the IT organization is doing.
- Problem Management—Support staff and managers can analyze help desk cases and identify common problems and their root causes to enable more effective problem resolution in the IT environment.

## **Change Tasking module**

The Change Tasking module provides support staff with the following change request tracking capabilities:

- Change tasking—Supervisors assigned to a change request can create tasks that define the activities of the change request. These tasks are tracked and monitored separately from the change request, but the overall change request monitors the progress of the tasks.
- Creating predefined tasks—Change supervisors can automatically create templates of predefined tasks for commonly performed change requests.
- Scheduling for tasks—Tasks can be planned in advance, yet implementors are not notified until their task is scheduled.
- Three-tiered change request and change task categorization— Categorization menus enable users to quickly describe the category, type, and item of a change request or task.



- Relationships across modules—Support staff can relate help desk cases, other change requests, and asset inventory records to a change request.
- Requester information tracking—Support staff have access to the people and group databases, which enables them to create or modify requester information when they are working with a change request.
- Tracking time spent on a change request or task—Managers can review and summarize the amount of time spent working on each change request or task by monitoring the Actual Duration field.
- **Reminder messages**—Support staff can define messages to be sent to groups or people at specific intervals over the life of a change request and its tasks.
- Escalations—Conditions for escalating change requests are monitored on a regular basis, and escalation actions are performed, such as sending a notification to the support staff member's manager. The Change Tasking module has four predefined escalations for urgent, high, medium, and low-priority change requests.
- Group and individual assignments—Support staff groups or members are automatically assigned to work on change requests and tasks.

### Asset Inventory module

The Asset Inventory module provides the support staff with the following asset tracking capabilities:

- Two levels of asset tracking—Support staff can classify assets individually or as main assets with component assets.
- **Relationships across modules**—Users can relate help desk cases, change requests, and other asset inventory records to an asset record.
- Three-tiered asset and component categorization—Categorization menus enable users to quickly describe the category, type, and item of an asset or a component.
- Asset owner, user, and manager information tracking—The support staff can create or modify asset owner or user information during the update of an asset record. An asset can have multiple owners and users.



## **Common features**

Many features are common across the Help Desk, Change Tasking, and Asset Inventory modules. These include shared resource management features and common management tools in each module.

#### **Resource management**

All Remedy Help Desk modules share the following resource management functions:

- Common databases of people and groups—These databases store requester information and information about the support staff groups and individuals.
- Automatic group assignment—The Help Desk and Change Tasking modules automatically assign new cases, change requests, or tasks to support staff members or groups based on categorization, location, availability, and the corresponding responsibilities associated with the support staff members or groups.
- Master work schedule—This schedule defines the IT organization's business hours and holiday schedule; for example, for use in escalations.

#### **Management tools**

All Remedy Help Desk modules provide the following management tools:

- Management view table—From the IT Service Management Console, managers have convenient access to escalated requests, reassignment requests, solutions awaiting approval, and urgent requests.
- Integration between Help Desk, Change Tasking, and Asset Inventory— Managers and support staff can track related cases, change requests, and asset records within their organization.
- Integration with Crystal Reports—Managers and support staff can generate and view a variety of predefined summary and detail reports through the Crystal Reports engine.
- Automatic escalation—Managers are notified of cases or change requests open beyond a predefined length of time. The information includes the severity of the case or change request and who requested it.
- **Preferences**—Support staff and managers can customize the actions for their modules. For example, they can specify what form appears when they begin creating a request.

# **Other Remedy applications**

The other Remedy applications in the Remedy IT Service Management Suite work in conjunction with the Remedy Help Desk application. When installed along with Remedy Help Desk, these applications expand the functionality of the three basic modules.

**Note:** This expanded functionality is not available with Remedy Help Desk 5.5 Small Business Edition.

### **Remedy Change Management**

The Remedy Change Management application enables IT service organizations to plan, approve, assess risks, schedule, implement, and track changes in an IT environment. Change Management works in conjunction with AR System User Tool and the Remedy Approval Server.

### **Remedy Asset Management**

The Remedy Asset Management application enables IT service organizations to manage assets throughout their life cycle. Using Asset Management, support staff and management can more effectively track assets to resolve help desk cases. Asset Management also enables IT service organizations to view relationships between assets in a networked environment, generate purchase requisitions for assets, perform cost analysis, manage integration among assets, and gain a better perspective on total cost of ownership for assets.

### **Remedy Service Level Agreements**

A service level agreement is a contract that defines the quality of service that a customer can expect from a support provider. The Remedy SLA application enables IT managers to guarantee a high level of responsiveness and to measure the relationship between the support staff and their customers. Remedy Help Desk 5.5





# Remedy Help Desk Requester

The Remedy Help Desk application enables your IT department to manage your requests for support.

The following topics provide information about the Help Desk application's Requester view and the activities that requesters can perform:

- "Working with Remedy Help Desk as requester" on page 26
- "Creating new requests" on page 31
- "Resolving help desk cases on your own" on page 33
- "Working with existing requests" on page 35
- "Closing and reopening resolved requests" on page 40
- "Viewing Bulletin Board messages" on page 43
- "Searching for a person's or group's record" on page 48
- "Working with table data" on page 50
- "Exiting the Help Desk application" on page 52



## Working with Remedy Help Desk as requester

Requesters are usually employees who need assistance from the IT support staff. Traditionally, help desk requesters made a telephone call to a central help desk. A staff member then logged, tracked, and solved their requests. The Remedy Help Desk application enables *anyone* to log, track, and (in some cases) resolve their own requests.

The Remedy IT Service Management Console is the primary interface for requester tasks you perform using Remedy Help Desk. From the Remedy IT Service Management Console, you can create a request and submit it to the system, search for and view previously created requests, and fill out a survey form after the request has been resolved.

The procedures in the following sections describe the tasks you can perform.

# Accessing the Remedy IT Service Management Console as a requester

- ▶ To access the Remedy IT Service Management Console in Windows:
- Double-click the icon that your administrator has set up for you on your desktop.

If you are a first-time user, the AR System User Tool login window is displayed. Follow the procedure for logging in as a first-time user. Otherwise, the Remedy IT Service Management Console is displayed.

# 

#### • To log in as a first-time user:

Login - AR Syste	em User	習困 翻Remedy <sup>.</sup>
<u>U</u> ser Name: <u>P</u> assword: Preference <u>S</u> erver: Authe <u>n</u> tication:		× ×
Accounts		OK. Cancel

1 In the AR System User Login window, your AR System user name.

To add your name to the User Name list:

- a Click Accounts.
- **b** In the Accounts dialog box, click Users.
- c In the Users dialog box, click Add,
- d In the Add User dialog box, enter your AR System user name, and click OK.
- e Click OK to close the Users dialog box.

The next time you log in to the AR System User Tool, you can choose your name from the list in the User Name field.

- 2 Enter your password.
- **3** If your administrator has set up a preference server for centralized user preferences, enter the name of that server.

If your administrator has not specified a preference server or authentication information, you can leave these fields blank.

To log in to a specific application server:

- a Click Accounts.
- **b** Check the list of servers. If the server to which you want to log in is not listed, click Add, and add the server name.
- c Click OK.
- 4 Click OK in the Login dialog box.



The Remedy IT	Service Management	Console is dist	played.

龆Remedy <sup>.</sup>	Remedy IT Service Management
Quick Links New Request	IT Service Management Console My Requests
Survey	Record ID Summary Status Assigned To Create Date
Other	
<u>Reminders</u>	
<u>Help</u>	
	View Refresh Bulletin Board
	Durieum Board Ereatedate Priority Short-Description 10/23/02/35549(High Voicemail is not accessible in Dallas office
	View Refresh

#### ▶ To access the Remedy IT Service Management Console from a browser:

1 Open the browser and enter the URL designated by your administrator.

To log in as a requester, enter http://<web\_server>:<port>/arsys/apps/default/ <ar\_server>/ITSMHD/RemedyRequester\_Administrator.jsp

where:

- *web\_server>* is the fully qualified name of the AR System mid tier that contains the web views of the Help Desk application.
- *<ar\_server>* is the name of the AR System server on which the application is installed.

The Login screen is displayed.

盟Remedy <sup>.</sup>	Remedy IT Service Management	A.
	Welcome	
	Welcome	
	User Name*	
	Password	
	Authentication	
	Login Clear	
		-



- 2 Enter your AR System user name.
- 3 Enter your password.

**Note:** Unless your administrator has given you specific instructions, you can leave the Authentication field blank.

4 Click Login.

A new window appears, prompting you to select the Requester Console.

盟Remedy <sup>.</sup>	Remedy IT Service Management	*
	Click the console to access	
	Requester Console	
	Logout	
		4

5 Click the Requester Console link.

The Remedy IT Service Management Console is displayed.

<mark>ick Links</mark> w Request rvey	Requester ( My Requests	Console					
<u>IVCY</u>	Record ID	Summa	ry	<u>Status</u>	Assigned T	■ ▼Create Date	-
ner	TSK000000000000	Install new h drive	hard	Closed	Demo	3/3/03 1:46:08 PM	
<u>minders</u> Ip	TSK000000000059	Test Hard D	rive	New	Demo	3/2/03 9:57:00 PM	1
	TSK00000000058	Restore Ser Data	ver	New	Demo	3/2/03 9:52:13 PM	1
Logout	TSK00000000057	Install New H Drive	Hard	New	Demo	3/2/03 9:52:12 PM	1
	TSK00000000056	Backup Ser Data	ver	New	Bob Backline	3/2/03 9:52:11 PM	1
	View Refrest			Priority	Sh		~
	10/23/02 3:55:49 P	_	High			l is not accessible in	
	3/3/03 4:06:39 PM		High			in Carmel room is ebcasts impaired	
	T View Refrest	n				1	·



# Working with the Remedy IT Service Management Console as a requester

You can use the following buttons and links to do your work as a requester:

- New Request—Enables you to create a new request. The request can be a help desk case where you ask for assistance with a problem (such as a malfunctioning printer), or a change request to schedule a service (such as a software upgrade).
- Survey—Enables you to fill out a customer satisfaction survey, where you can express your level of satisfaction for service that you have received from the support staff for resolving help desk cases. A survey becomes available when a case is closed. Surveys are not available for change requests.
- Reminders—Enables you to create and view notes to yourself or others about a request. For example, you can create a reminder to follow up with someone about a question related to a request. Depending on the settings chosen by the support person creating the reminder, a reminder can be viewed by other requesters or by support staff.
- Help—Enables you to display requester online help for the Help Desk application. When you click the help link, a tri-pane help window appears, with a Table of Contents that lists the available help topics. When you click a topic, the help text for that topic appears in the right pane.
- Logout (Web only)—A button that enables you to log out of the Help Desk application.

## Auto-fill feature in fields and lists

When a plus sign (+) is included in a field label on a form, you can type part of the information and click Enter. If an exact match is found in the database, the system automatically completes the field. If a selection list appears, double-click on the selection you want to enter into the field. Using the autofill feature in fields and lists is faster, more consistent, and more accurate than typing the information yourself.

## **Creating new requests**

Requesters who need technical support can contact their support organization by telephone, email, and by submitting requests directly into the Remedy Help Desk application.

#### ► To create a new request:

1 On the Remedy IT Service Management Console, click New Request. The New Request form is displayed.

盟Remedy <sup>.</sup>	Remedy IT Service Management	
New Request		
Urgency* Low		
Summary*+		·
Details*		Help
Possible Solutions		
Summary	Category Type	ltem
	Cilick to Fietneich	
View Use Solution		

- 2 In the Urgency field, select the urgency level of this request. Options are Low, Medium, High, and Urgent.
- **3** In the Summary field, select a predefined summary by clicking the arrow to the right of the field, or enter your own brief summary.

If one or more solutions are available based on what you enter in the Summary field, they are listed in the Possible Solutions table. If a listed solution appears to meet your needs, you can use that solution to resolve the case yourself. For more information, see "Resolving help desk cases on your own" on page 33.

- 4 The summary you choose also determines whether the Requested Date field is displayed. If it appears, it will be in the upper right area of the form. Enter the date by which you need the request fulfilled, or click the button and select the date from the calendar that appears.
- 5 In the Details field, enter a more detailed description about the request.



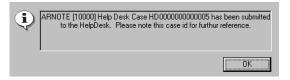
For example, when creating a help desk case, describe the steps you took before the problem occurred.

6 Click Save to submit the request.

A message is displayed that specifies the individual or group from the support staff who are assigned to the request.

7 Click OK to dismiss the message.

Another message reports that the request has been submitted.



The prefix of the request ID number indicates whether a help desk case or a change request was created:

- HD indicates a help desk case.
- CHG indicates a change request.
- 8 Click OK to dismiss the message.

## Resolving help desk cases on your own

 $\sim$  L

If you are requesting assistance with an issue, you can try to resolve the case on your own by looking for possible solutions in the solutions database.

- To search for possible solutions for a help desk case:
- 1 On the Remedy IT Service Management Console, click New Request.
- 2 In the Urgency field, select a value.
- **3** In the Summary field, select a predefined summary from the menu by clicking the arrow to the right of the field, or enter your own summary.

If one or more solutions are available based on what you enter in the Summary field, they are listed in the Possible Solutions table at the bottom of the form.

Possible Solutions			
Summary	Category	Туре	Item
Open the panel doors and remove obstructed paper.	Printing	Printer Failure/Error	Jammed Paper
View Use Solution			

4 Select a solution, and click View.

The Solution form is displayed, showing the details of the solution.

Solutio	20							4
Solutio	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,							
Solution	Details							
Summary	Open the panel doors	and remov	ve obstructed pape	r		History Log		] [
Description	If removing the obstruc	ted paper	does not clear the	problem, enter a request	for serv	/ice.		
Status*	Current	•	Submitted By*	Sam Secondlevel		Modified By	HD Requester Fixed	1
Count	15		Created	1/27/1999 3:27:29		Modified	3/24/2003 6:11:45	
Case Des	scription							
Category	Printing	•	Summary*	Printer is jammed.				
Туре	Printer Failure/Error	-	Description	The printer keeps jammi	ng.			
Item	Jammed Paper	-		List All Cases				_
		_						

**5** Review the solution.



If the solution appears to meet your needs, you can use it to resolve the case without the assistance of the support staff, as outlined in step 7.

- 6 Click Close to return to the Possible Solutions table in the New Request form.
- 7 If you decide to use a solution:
  - a Select the solution from the list, and click Use Solution.

A message reports that the request will be marked as Resolved when the request is saved.

- **b** Click OK.
- **c** Save the request.

A message reports that the case has been submitted.

8 If you decide not to use a solution, enter the appropriate information for the case, and click Save to submit it, as described in "Creating new requests" on page 31.

# Working with existing requests

When working with requests, you can perform the following tasks:

- View a list of your requests.
- Check the status of a request.
- Modify a request.
- Print a request, either within its form or as a quick report that includes the data of the request.

## Viewing a list of your requests

All the requests that you have created are displayed in the My Requests table in the Remedy IT Service Management Console. To retrieve the latest entries from the database, click the Refresh button below the table.

Record ID	Summary	Status	Assigned To	Create Date
	106 Cannot connect re			Tuesday, February 🗍
	105 software upgrade			Tuesday, February
CHG000000000	005 Upgrade Microsoft	Assigned		Tuesday, February
HD 0000000000	006 SAP application er	Assigned		Tuesday, February
CHG000000000	005 Upgrade memory	Pending		Tuesday, February
TSK00000000	04 Install MS Office	New	Bob Backline	Thursday, January
TSK000000000	104 Set up 401 K Acco	New	Holly HR	Thursday, January
TSK00000000	104 Set up Employee	New	Holly HR	Thursday, January
TSK00000000	104 Setup network co	New		Thursday, January
TSK00000000	105 Install memory	New		Thursday, January
TSK00000000	105 Remove Old Hard	New		Thursday, January
TSK000000000	105 Backup User's Da	ÉNew		Thursday, January
TSK00000000	105 Install New Hard D	New		Thursday, January
τεκοοοοοοο	105 Restore Liser's Da	New		Thursday Japuary



### Checking the status of a request

The My Requests table in the Remedy IT Service Management Console shows the status of each request listed. To view additional details about the request, select it, and click View. The Help Desk case form is displayed with the details of the request.

龆Reme	dy i	Remedy H	elp Desk				
Help Des	k Case						
Summary*	Printer is jammed			<b>•</b>	Status*	Assigned	•
Description*	Printer keeps jamming a	nd needs servicir	ig.		Pending		•
Category*	Printing	-	Case ID+	HD00000000066	Closure Cod	e	<b>•</b>
Туре*	Printer Failure/Error	-	Case Type*	Incident 💌	Escalated?	No	•
ltem*	Jammed Paper	-					
Requester Info	ormation Solutions						
Login*+	Demo		Region	USA	<ul> <li>Source*</li> </ul>	Requester	Y
Name*+	Demo	Profile	Site	1505 Salado, Mountain '	<ul> <li>Urgency</li> </ul>	Medium	•
Phone	555-5555		Department	Information Services	•		
			Office	3-A			
Requester's				e found used by this req		-	
Asset ID	Serial N	umber	Asset Nam	e Category	Туре	Item	
View	Refresh						
Save Pr	int Case Bulletin Boa	rd Reminders	Close				Help

You can view status details and other information for the request:

- The top region of the request form provides a general description of the case, the case type, status, and escalation information.
- The Requester Information tab displays data about the requester. The Source field specifies how the request was originated—by the requester, by phone, by email, or from the web.

Requester Ini	formation Solu	utions							
Login*+	Demo			Region	USA	•	Source*	Requester	•
Name*+	Demo		Profile	Site	1505 Salado, Mountain	•	Urgency	Medium	•
Phone	555-5555			Department	Information Services	•			
				Office	3-A				
Requester	's Assets			No Assets were	e found used by this r	eques	ster.		
Asset ID		Serial Numbe	er 🛛	Asset Name	e Category		Туре	Item	
		-							
View	Refresh								



The Requester Information tab also includes an Assets Used by Requester table, which lists any assets used by the requester. If an asset is listed, you can view its record by clicking the View button below the table. For more information about viewing asset records related to Help Desk cases, refer to "Working with the Asset Inventory Module as Support" on page 159.

If the Remedy Asset Management application is installed at your site, you can perform additional tasks related to assets. For more information, see the *Remedy Asset Management User's Guide*. This additional functionality is not available with the Remedy Help Desk 5.5 Small Business Edition.

 The Solutions tab displays information about possible solutions for the case. You can view additional solutions by clicking the List Possible Solutions button. If solutions are available, a list of solutions is displayed.

Requester Information	Solutions	
Current Case So	lution	
Summary		<b>▼</b>
Solution Details	lions	

When you are finished viewing the details of the request, click Close to return to the Remedy IT Service Management Console.

### Modifying a request

You can modify a request only if you created it, or if a support staff member created it with you as the requester. You cannot modify requests submitted by others. In addition, you can modify only those fields to which you have write access, such as the description. If you try to make changes to a field to which you do not have access, a message informs you that you do not have access permissions for that field.

To modify requests, the AR System server must be configured to enable you to modify requests without a write license.



- ► To modify a request:
- 1 In the My Requests table in the Remedy IT Service Management Console, locate the request that you want to modify.

If necessary, click the Refresh button to update the list.

- 2 Click on the request you want to modify.
- 3 Click View.

The request is displayed.

4 Make the appropriate changes.

The following fields cannot be modified:

- Case Type
- Escalated?
- Status
- Source
- 5 Click Save.
- 6 Click Close to return to the Remedy IT Service Management Console.

### **Printing a request**

You can print an image of a request in its form, or you can print a report of the data in the request.

#### Printing an image of a request

When you print an image of a request, you are capturing a screen image of the form with the request details.

#### ► To print a request in its form:

- 1 Open the request, as described in "Modifying a request" on page 37.
- 2 Choose File > Print.
- 3 Select print options, and click OK.

An image of the request in its form is printed.

#### Printing a report on demand of a request

A report on demand prints the data of the request. To print a report on demand for a request, a report server must be specified in the AR System User Tool.



**•** To specify a report server for viewing and printing reports:

 From the AR System User toolbar, select Tools > Options. The Options dialog box is displayed.

Options				? ×
General Reports	Behaviors Advanced	Display Logging	Color   Locale	Confirmation   File
Table Fiel	ay Hidden Forms (Adn ds			
Reports Report S	ssh Contents on Displa Server erver: f his program to preview : A simple text editor,	TC		PC
		[	OK	Cancel

- **2** Click the Advanced tab.
- **3** In the Report Server field, enter the name of the server to which you are currently logged in.

Unless your administrator has specified information for the TCP and RPC fields, you may leave those fields blank.

4 Click OK.

#### • To print a report on demand for a request:

- 1 Open the request, as described in "To modify a request:" on page 38.
- **2** Click the Print Case button.

The Print dialog box is displayed.

**3** Select print options, and click OK.

A report is printed with the data from the request.

## **Closing and reopening resolved requests**

You are automatically notified when a request is resolved. You can then review the request and close it. If the request is a help desk case, you can also fill out a customer satisfaction survey.

If you are not satisfied with the resolution, you can reopen the request. The request's status changes to Assigned, and the assignee is notified.

If you do not close or reopen the request, it will be closed automatically after the time interval specified by the administrator. For example, your application might be configured to close resolved requests automatically after 15 days.

You can modify only those requests you have created, or those created by support staff with you as a requester. In addition, your administrator must verify that the AR System server is configured to enable you to modify requests without a write license.

### • To close a resolved request:

1 From the Remedy IT Service Management Console, select a resolved request that you want to close.

HD000000000000000000000000000000000000	Record ID	Summary	Status	Assigned To	Create Date
CH60000000005 Upgrade Microsoft Assigned Tuesday, February Uesday, February CH600000000005 SAP application ef Assigned Tuesday, February TSK00000000005 Johgrade memory Pending Thursday, January TSK00000000004 Set up 401K Acco New Holly HR Thursday, January TSK00000000004 Set up 401K Acco New Holly HR Thursday, January TSK00000000005 Set up 600 New Holly HR Thursday, January TSK00000000005 Set up 600 New Thursday, January TSK0000000005 Set up 600 Hard New Thursday, January TSK0000000005 Set up 600 Hard New Thursday, January TSK0000000005 Set up 600 Hard New Thursday, January TSK0000000005 Install New Start New Thursday, January Sto000000005 Install New Start New Start New Start Start New Start					Tuesday, February
H00000000006 SAP application er Assigned Tuesday, February L CHG00000000004 Ipstal MS Office New Bob Backline Thursday, January TSK00000000004 Set up 401K Acco New Holy HR Thursday, January TSK00000000004 Set up 610 New Holy HR Thursday, January TSK000000000004 Set up network co New Thursday, January TSK000000000005 Instal New New Thursday, January TSK000000000005 Instal New Had D New Thursday, January TSK00000000005 Instal New Had D New Thursday, January					Tuesday, February
CH60000000005 Upgrade memory Pending Tuesday, February TSK000000000000 Install MS Office New Bob Backline Thursday, January TSK000000000004 Setu p 401K Acco New Holly HR Thursday, January TSK00000000004 Setu p Employee New Holly HR Thursday, January TSK00000000005 Setu p Kenkor ko New Thursday, January TSK00000000005 Renove CI H Ard New Thursday, January TSK00000000005 Renove CI H Ard New Thursday, January TSK00000000005 Benove CI H Ard New Thursday, January TSK00000000005 Install New Had D New Thursday, January TSK00000000005 Install New Structure St	CHG0000000000	5 Upgrade Microsoft	Assigned		
TSK00000000004 Install MS Office New Bob Backline Thursday, January TSK00000000004 Set up 401K Acco New Holly HR Thursday, January TSK00000000004 Set up Enlysee New Holly HR Thursday, January TSK00000000005 Install memory New Thursday, January TSK00000000005 Install memory New Thursday, January TSK00000000005 Install New Thursday, January TSK00000000005 Install New Had D New Thursday, January					
TSK00000000004         Set up 401K Acco New         Holly HR         Thursday, January           TSK00000000004         Set up Employee         New         Holly HR         Thursday, January           TSK00000000004         Set up Employee         New         Holly HR         Thursday, January           TSK00000000005         Intursday, January         Thursday, January         Thursday, January           TSK00000000055         Renove Cli Hard         New         Thursday, January           TSK00000000055         Renove Cli Hard         New         Thursday, January           TSK000000000055         Inskith Hard         New         Thursday, January           TSK000000000055         Inskith Hard         New         Thursday, January					Tuesday, February
TSK0000000004         Set up Employee         New         Holy HR         Thursday, January           TSK0000000004         Setup network co         New         Thursday, January           TSK0000000005         Instal monto         New         Thursday, January           TSK0000000005         Instal monto         New         Thursday, January           TSK0000000005         Remove Old Hard         New         Thursday, January           TSK00000000055         Remove Old Hard         New         Thursday, January           TSK00000000055         Instal Mew         Thursday, January           TSK00000000055         Instal Mew         Thursday, January	TSK0000000000	4 Install MS Office	New	Bob Backline	Thursday, January
TSK00000000004 Setup network co New Thursday, January TSK0000000005 Install memory New Thursday, January TSK0000000005 Bremove Old Hard New Thursday, January TSK00000000005 Install New Hard D New Thursday, January	TSK0000000004	4 Set up 401K Acco	New	Holly HR	Thursday, January
TSK0000000005         Install memory         New         Thursday, January           TSK0000000005         Remove Did Hard         New         Thursday, January           TSK0000000005         Backup User's Dat New         Thursday, January           TSK0000000005         Install memory         New           TSK0000000005         Backup User's Dat New         Thursday, January           TSK0000000005         Install Mem Hard Di New         Thursday, January	TSK0000000004	4 Set up Employee	New	Holly HR	Thursday, January
TSK0000000005         Remove Old Hard         New         Thursday, January           TSK0000000005         Backup User's Da'New         Thursday, January           TSK000000005         Insal New Hard D New         Thursday, January	TSK0000000004	Setup network co	New	1	Thursday, January
TSK0000000005 Backup User's Dat New Thursday, January TSK0000000005 Install New Hard D New Thursday, January					Thursday, January
TSK0000000005 Backup User's Dat New Thursday, January TSK0000000005 Install New Hard D New Thursday, January	TSK0000000000	Remove Old Hard	New		Thursday, January
TSK0000000005 Install New Hard D New Thursday, January	TSK0000000000	5 Backup User's Da	t New		Thursday, January
TCK000000000 D I I D NI	TSK0000000000	5 Install New Hard D	New		Thursday, January
TSK ULULUUUD Beetore Lier Maili - Duredai Tabuari -	теклопополом	Bestore Heer's Da	K New		Thursday January

2 Click View to open the selected request.

The request is displayed in its form (either the Help Desk form or the Change Request form, depending on the type of request).

- **3** In the Requester Information tab, set the Confirm Resolution field to Close Case (help desk cases) or Close Request (change requests).
  - For help desk cases, the Confirm Resolution field is in the Requester Information tab.



• For change requests, the Confirm Resolution is in the lower right portion of the form.

The Status field is changed automatically to Close when you modify the request.

4 Click Close to return to the Remedy IT Service Management Console.

#### • To reopen a resolved request:

- 1 From the Remedy IT Service Management Console, select a resolved request in the My Requests table.
- **2** Click View.

The request is displayed.

**3** Set the Confirm Resolution field to Reopen Case.

The Status field is changed to Assigned.

- **4** Provide the reason for reopening the request:
  - If the request is a help desk case, enter information in the Description field.
  - (Required) If the request is a change request, click the Assessment tab, and enter information in the Work Log field.
- **5** Click Save.

## Completing a customer satisfaction survey for a help desk case

When a help desk case is closed, you are prompted to complete a customer satisfaction survey. You can complete this survey in response to the prompt, or complete it later by selecting Survey from the Remedy IT Service Management Console.

► To complete a customer satisfaction survey for a help desk case:

- 1 Display the Survey form in one of the following ways:
  - Close a resolved help desk case. For instructions, see "To close a resolved request:" on page 40. A message prompts you to complete the survey. Click OK. The Survey form is displayed.
  - Click Survey on the Remedy IT Service Management Console.



If there are no closed help desk cases, a message reports that you have no surveys to fill out.

If one or more resolved help desk case have automatically changed to Closed, or if a support staff member has closed one or more help desk cases, a list of cases is displayed. Select a case, and click Respond. The Survey form is displayed.

If you cannot access the survey, contact your administrator.

2 In the Survey form, enter or select a number (1 to 10) in each of the Rating fields to indicate your degree of satisfaction. Typically, 1 is the lowest rating and 10 is the highest.

盟Remedy	
Survey	
Case Id HD00000000066 Case Description Printer is jammed	
Question 1 Was the service provided timely Rating (1-10) 10 📑	
Comment Testing	
Question 2 Was the technician knowledgeable Rating (1-10) 0 🚍	
Comment	J
Question 3 Was the problem solved to your satisfaction Rating (1-10) 0 🚔	
Comment	
Question 4 🗰 Rating (1-10) 0 📑	
Comment	J
Save Close	

In Windows, you can use the spinner buttons (the up and down arrow buttons to the right of the Ratings fields) to increase or decrease the rating number in the field.

- 3 Optionally, enter any comments in the Comments field.
- 4 Click Save.

## **Viewing Bulletin Board messages**

You can view Bulletin Board messages that have public access. Only users in the support, management, and administrator groups can create or delete Bulletin Board messages.

- ► To view a Bulletin Board message:
- 1 In the Bulletin Board table on the Remedy IT Service Management Console, locate the message that you want to view, and click on it.

From a form, click the Bulletin Board button to view the table.

2 Click View.

The message is displayed in the Bulletin Details page.

盟Remedy <sup>.</sup>				- and	
Bulletin Deta	ails				
Short Description	Voicemail is n	ot accessible in [	allas office		
Detailed Description					
Attachments					
Filename					
	File Name	Size	Attachment		
			Attachment1		
Close	Add	Delete Di	splay Save To D	isk	

**3** If the Detailed Description field does not fully display the text, click the ellipses button (...).

If the message contains an attachment, you can view it or save it to disk.

#### • To view or save an attachment:

- 1 Select the attachment.
- **2** Do either of the following:
  - Click Display to view the attachment on your screen.
  - Click Save to Disk to save the attachment. When the File Download window appears, click Save. When the Save File window appears, select a directory, and click Save. You can then open the attachment from the location to which you saved it.



## **Using reminders**

Reminders enable you to create notes for yourself and others. You can send them by email or by AR System Alert, and you can specify when they will be sent.

You can create generic reminders, or you can create reminders that are associated with a specific request. For example, you can send yourself a note about a specific help desk case to remind yourself to follow up on the problem.

Whether you access reminders from the Remedy IT Service Management Console or from within a request determines which reminders you will be able to view:

- When you open the reminders dialog from the Remedy IT Service Management Console, you can view all reminders that you have created.
- When you open reminders from within a request (if you have a request form open), you can view all reminders associated with that request. This includes reminders created by other users of Remedy Help Desk.

## **Creating new reminders**

You can create reminders for distribution to individuals or groups, and you can associate reminders with specific requests.

#### • To create a reminder:

1 From the Remedy IT Service Management Console, click Reminders. The Reminders dialog box is displayed.



**2** Click the Create Reminder tab.

龆Remedy <sup>.</sup>			
Reminders Show Reminders Cre	ate Reminder		
Link to Request-ID Form Notification* Time*+	3/27/2003 12:55:31	Notify" Individual Person"+ AR Login Email	Profile
Subject <b>Message*</b> Log			
Close	Save		

**3** In the Link to Request ID field, enter the request ID with which you want to associate the reminder.

If you opened the Reminders dialog box from within a request, this field is automatically filled in with the appropriate request ID. You can delete the request ID if you do not want to associate the reminder with this request.

4 In the Form field, enter the form name with which you want to associate the reminder. This indicates whether the reminder pertains to a help desk case or a change request.

If you opened the Reminders dialog box from within a request, this field is automatically filled in with the appropriate form name. You can delete the form name if you do not want to associate the reminder with this form.

- 5 Select one of the following notification methods from the Notification field:
  - Alert sends the reminder through AR System Alert. You must fill in the AR Login field to use this notification method.
  - Email sends the reminder by email. You must fill in the Email field to use this notification method.
  - User Default sends the reminder based on the notification method specified in the user's profile.



- **6** By default, the Time field contains the current date and time. Change this to the time that you want the system to send the reminder. You can enter the time, or click the button next to the field and select the time from the calendar that appears.
- 7 In the Notify option fields, select Individual or Group.
- 8 In the Person or Group field, enter the name of the person or group you want to notify.

If you do not know the name, you can perform a search. For more information about searching for a person's record, see "Searching for a person's or group's record" on page 48.

9 To view more detailed information about the person or group, click Profile.

The Person Information or Group Information dialog box is displayed. You cannot make changes in this dialog box. When you have finished reviewing it, click Close.

10 In the Subject field, enter information about the reminder.

The information in this field appears in the subject line if the reminder is sent by email.

11 Enter the reminder message in the Message field.

**Note:** Do not enter anything in the Log field. This field records the subject line and text of the reminder when it is sent.

12 Click Save.

The reminder will be sent at the time you specified.

## Viewing, modifying, and deleting existing reminders

You can modify or delete only the reminders that you have created.

#### ► To view and modify existing reminders:

1 From the Remedy IT Service Management Console, or from within a request, click Reminders.

The Reminders dialog box is displayed. If you opened the dialog box from the Remedy IT Service Management Console, all reminders that you created are displayed. If you opened the dialog box from one of your requests, only the reminders associated with that request are displayed.



**2** In the Show Reminders field, select the set of reminders that you want to view. Options are All, Pending, and Sent.

The reminders are displayed in the table.

**3** Select a reminder, and click View.

The Reminder Details dialog box is displayed.

4 Update the reminder as needed, and click Save.

**Note:** If the reminder you selected was already sent, it is not saved. You will need to create a new reminder.

A message reports that the reminder has been modified.

- 5 Click Close to close the Reminder Details dialog box.
- ► To delete an existing reminder:
- 1 From the Remedy IT Service Management Console, or from within a request, click Reminders.

The Reminders dialog box is displayed. If you opened the dialog box from the Remedy IT Service Management Console, all reminders are displayed. If you opened the dialog box from a request, only the reminders associated with that request are displayed.

**2** In the Show Reminders field, select the set of reminders that you want to view. Options are All, Pending, and Sent.

The reminders are displayed in the table.

- **3** Select the reminder that you want to delete.
- 4 Click Delete.

A message reports that the reminder has been deleted.

5 Click Close to close the Reminders dialog box.

## Searching for a person's or group's record

If you are not sure if a person or group already has an existing record in the People database, you can perform a search. You can view the person's or group's record, but you cannot modify it.

- 1 In the Create Reminders tab, select the appropriate topic in the Notify field.
- 2 Place the cursor in the Person or Group field, and press Enter.

Show Reminders Cre	ate Reminder	
Link to Request-ID Form Notification* Time*+	Vednesday,	Notify*     Individual       Person*     I       AR Login     I       Email     I

The Search People or Search Group dialog box is displayed.

**Note:** The fields that appear in the Search People dialog box will vary, depending on the selection you made in the Notify field.

鼦Remedy <sup>.</sup>		
Search Criteria		
Last Name	Departme	nt
Full Name	Login Nar	ne
Search	Clear Fields	
Search Results		
Last Name First Na	ne Region Site	Department
	Click to Reheads	
View		
OK Cancel		Help

- 3 Enter search criteria in the appropriate fields.
- 4 Click Search.



Remedy <sup>.</sup>				
Search Cr	iteria			And the second second second
Last Name fr	ontline		Department	
Full Name			Login Name	
	Search	Clear Fields		
Search Re	esults			
Last Name Frontline	First Name Francie	Region USA	Site	Department lo, Mo Information Servic
Frontline	rancie	:U3A	; 1000 5 alac	io, Mo i information Servic
View				

The Search Results table shows the matching records.

5 To view a record, select it, and click View.

The Person or Group Information dialog box is displayed.

盟 Remedy	r.						
Person Inf	ormation						
Login*	Francie Frontline	Last Name*	Frontline		Support Staff?*	Yes	T
ID	3001	First Name	Francie		Туре*	Internal	•
Status*	Active 💌	Full Name*	Francie Frontline		VIP	No	•
		Training		Ш	Manager?	No	•
Contact Pager Notification I Email Address Phone Number Fax Number	Address Financials	Region Site Department	USA 1505 Salado, Mountain Information Services		Office Manager's Name+ Web Page	1.A Demo	
Save C	ose						Help

The top portion of the form provides general information about the group or person. The tabs in the bottom portion of the form provide additional contact, pager, address, and cost center information.



- The Contacts tab provides contact information and the preferred contact method for this person.
- If the person has a pager, the Pager tab provides paging information for this person.
- The Address tab specifies the person's mailing address.
- The Financials tab shows the cost accounting and cost center information associated with this requester. The Accounting Code and cost center data is configured by the administrator.
- 6 Click Close when you are finished viewing the record.

## Working with table data

The Remedy Help Desk Requester application contains tables that display data for requests. For example, in the Remedy IT Service Management Console, tables list your current requests and bulletin board messages. Within forms, additional tables provide information such as possible solutions and person or group information. Search dialog boxes also include tables that display search results.

## Updating table data

You can retrieve the latest data in a table using the methods outlined below.

- To update table data:
- Click the Refresh button below the table.

The latest data is loaded into the table.

In Windows, you can also right-click anywhere in the table and select an option from the menu.

- Refresh Table loads the latest data into the table. The administrator can set
  a limit on how many records are loaded into the table. The status bar of
  the main window indicates how many records are loaded.
- **Refresh All in Table** loads the latest data into the table and overrides any limitations the administrator may have set on how many records can be returned. Note that if a large number of records are returned, your server's performance may be slower.
- Clear Table removes the table data. To view any new data, click in the table.



If necessary, use the scroll bar at the right to scroll through the entries in the table.

To view the details of a request in the table, select the request, and click View.

## Sorting table data

- To sort table data:
- Click on the header of the column by which you want to sort the table. The list of items is ordered within that column.
- 2 To reverse the sort order within that column, click the column header again.

## **Printing table data**

You can print the data in a table using either of the following methods:

- ► To print data from any table:
- 1 Choose File > Print.
- 2 In the print dialog box, select printing options, and click OK.

An image of the table is printed. Only the entries currently in view on the screen are included.

#### ► To print table data in Windows:

- 1 Right-click on the table.
- 2 From the context menu that appears, choose Print Table. The Print dialog box appears.
- **3** Enter the printing specifications.
- 4 Click OK.

A list of all items in the table is printed, including those that are not in view.

## 

## **Exiting the Help Desk application**

- ▶ To exit the Help Desk application from the web:
- Click the Logout button in the Remedy IT Service Management Console. A message appears in the browser window, confirming that you are logged out. You can log in again, or close the browser window.
- ▶ To exit the Help Desk application from Windows:
- Close the Remedy IT Service Management Console window.

# **Remedy Help Desk Support**

The Remedy Help Desk Support application includes a set of modules focused on the expanding activities of your Information Technology (IT) support organization. The Remedy Help Desk Support application consists of the Help Desk, Change Tasking, and Asset Inventory modules. These modules offer solutions for the traditional help desk case, as well as for tracking inventory (Asset Inventory) and for tracking change requests (Change Tasking). The integration across the Support application gives your support staff quick access to the information they need.

The following sections provide overviews of each module:

- "Overview of Remedy Help Desk Support" on page 54
- "Overview of the Help Desk module" on page 55
- "Overview of the Change Tasking module" on page 56
- "Overview of the Asset Inventory module" on page 58

The following sections provide instructions for using features and performing tasks that are common to all modules:

- "Working with Remedy Help Desk as support" on page 61
- "Setting personal preferences and options" on page 66
- "Using the Bulletin Board" on page 72
- "Using reminders" on page 76
- "Working with table data" on page 80



## **Overview of Remedy Help Desk Support**

As a support staff member, you work with requesters to answer questions, resolve help desk cases, and implement change requests.

**Note:** Requests processed using the Help Desk module are referred to as *help desk cases*. Change Tasking requests are referred to as *change requests*. Asset inventory requests are referred to as *asset records*. When referring to help desk cases, change requests, and asset records in general, they are called *requests*.

Using the Remedy Help Desk Support application, support staff can perform the following tasks:

- Create, update, and resolve help desk cases and change requests
- Search for and view assigned help desk cases and change requests
- Create and look up potential solutions to help desk cases
- Create change tasks
- Create asset and component records
- Relate help desk cases, change requests, and assets
- Track requester information
- Create and send reminder messages to groups or people
- Create and view bulletin board messages
- Set personal preferences
- Generate reports

## 

## **Overview of the Help Desk module**

The Help Desk module provides you with problem management and problem resolution capabilities for your company's help desk cases. For more detailed instructions about performing the different tasks in the Help Desk module, see "Working with the Help Desk Module as Support" on page 83.

## Help Desk support roles

Most IT organizations will have both frontline and backline support staff who work together to create and resolve cases. The functions you perform using the Help Desk module depend on whether you are a frontline or backline help desk support staff member. In some cases, both roles may overlap.

#### Frontline support role

A key part of the support organization is frontline (first-level) support. Frontline support activities include taking requesters' calls, creating new requests, diagnosing (and in some cases resolving) less complex problems, and routing difficult or complex cases to qualified support staff.

Frontline support technicians use Remedy Help Desk Support to create requests that they receive by telephone or email. These requests are typically assigned to a backline support staff member; however, simpler cases can sometimes be resolved by the frontline staff.

**Note:** Case assignments are determined by case categorization, skills configuration, staff location, and staff availability. Your Help Desk administrator specifies the values in the Configuration Manager that determine to which individual or group the request is assigned.

#### **Backline support role**

Backline support members are usually more senior IT support staff who have specialized skills. If you are a backline support staff member, requests are assigned for you to troubleshoot and solve. These requests can be created by requesters or by the frontline support staff.

## **Overview of the Change Tasking module**

The Change Tasking module provides the change request and change task functionality of Remedy Help Desk. Requesters and support staff can create change requests from the Remedy IT Service Management Console. Support members use the change request and its associated tasks to help resolve the change request. For detailed instructions about performing the different tasks in the Help Desk module, see "Working with the Change Tasking Module as Support" on page 119.

By using Change Tasking, support staff can:

- Track complex changes.
- Implement changes while minimizing problems and down time.
- Define tasks that will fulfill the change request.
- Keep track of the steps taken.
- **Note:** If the Change Management application is installed, additional functionality is available. For more information, *see the Remedy Change Management 5.5 User's Guide*. This additional functionality is not available with Remedy Help Desk 5.5 Small Business Edition.

## Levels of change tasking

The Change Tasking module provides two levels of tracking change activities:

- Change requests
- Change tasks

#### **Change requests**

A change request is a request for a planned activity implemented by the support staff. Changes can affect an individual, a group of people, or an entire organization. Change requests often comprise many activities that are identified as change tasks.

A change request is assigned to a supervisor, who is responsible for planning and identifying the tasks and approvals needed to fulfill the change request.



#### Change tasks

A change request can involve multiple change tasks that must be coordinated. The change supervisor assigns these tasks to task implementors. For example, the task of installing new word processors for an entire organization might involve:

- Verifying that everyone has the necessary hardware and software installed.
- Ordering the software.
- Performing the actual installation.

Each change task can be tracked and monitored separately from the other change tasks. For example, different task implementors can be assigned to work on different tasks, and the task work logs contain information relevant to the task. The overall change request monitors progress of the tasks.

For example, if you are a change supervisor who has received a request to install new word processing software for the Sales department, you can log the change request using either of the following methods:

- You can track the change request as an individual item. You might use this approach if your organization is small and each change supervisor is responsible for the entire change request.
- You can create multiple change tasks for a change request if your organization is large or cross-functional and support staff members have more specialized responsibilities. For instance, under the software installation change request, you could specify two separate change tasks: one task to purchase the software, and one task to install it.

If a change task involves work to be done by an outside vendor, you can also specify the vendor information using the Work Order field on the Change Tasking form. Selecting Yes in this field enables a Work Order tab, in which you can enter address and contact information for the vendor doing the work.

## **Change Tasking roles**

The Change Tasking module can be used by two different support roles:

- Change supervisors
- Task implementors



#### Change supervisor

After a change request is created by a requester or a frontline support staff member, the request is automatically assigned to the appropriate change group or supervisor, based on the organization's support staff groupings. Supervisors are notified of changes assigned to them by email, paging, or AR System Alert.

The change supervisor is responsible for accepting change request assignments and for planning the change request. Planning activities include identifying, creating, and assigning the tasks that must be performed to accomplish the change.

A change request is resolved when all of the tasks are closed. The requester is then notified that the change request is resolved.

#### **Task implementors**

Task implementors are support staff members who perform the tasks associated with a change request.

When a change supervisor assigns change tasks, the task implementors are notified of tasks assigned to them by email, paging, or by AR System Alert. After a task is assigned, task implementors can log their progress as they complete the task.

## **Overview of the Asset Inventory module**

The Asset Inventory module provides a quick and convenient way to track and manage your organization's assets. Key features of the Asset Inventory module include:

- Two levels of assets: Main assets and components.
- Relationships across modules.
- Asset record maintenance by support staff.
- Asset reporting and monitoring by management.

For detailed instructions about performing tasks in the Asset Inventory module, see "Working with the Asset Inventory Module as Support" on page 159.



**Note:** If the Asset Management application is installed at your site, additional functionality will be available. See the *Remedy Asset Management 5.5 User's Guide* for more information. This additional functionality is not available with the Remedy Help Desk 5.5 Small Business Edition.

## Levels of assets

The Asset Inventory module provides two levels of assets:

- Main asset (an asset record)
- Asset component (a component record)

#### Main asset

You can track an asset through a single asset record, or you can create a record for the main asset with component records. For example, you could have a workstation with a monitor and an internal hard disk drive installed. You could inventory the entire workstation as one asset.

#### Asset component

An asset component is a subset of a main asset. For example, if you have a workstation with a monitor and an internal hard disk drive, you could inventory the workstation as the main asset, and the monitor and disk drive as components of the main asset.

## **Relationships across Help Desk modules**

Remedy Help Desk enables you to create relationships between assets, help desk cases, and change requests. Because the Asset Inventory module is a part of Remedy Help Desk, you can relate assets to change requests and help desk cases from within the Asset form. You can also relate assets to other assets.



## Asset record maintenance

You can keep a record for a main asset. You can enter information such as installation date and maintenance notes. If you change the status of the asset (for example, from Deployed to In Repair), this information is automatically stored in the audit log.

## Asset reporting and monitoring

Managers can access asset information by using the reporting functions of the Asset Inventory module.

## 

## Working with Remedy Help Desk as support

The Help Desk Support application provides all of the functionality of the Requester application, with the following additional capabilities:

- Set preferences and options
- Search for and modify requests
- Create and track assets
- View and generate reports

The following procedures outline how to access and use the Remedy IT Service Management Console in the support role.

## Accessing the Remedy Help Desk Support application

When you start Remedy Help Desk Support, the Remedy IT Service Management Console is displayed. The console lists the requests assigned to you and provides quick access to the tasks you perform as a support staff member.

▶ To open the Remedy Help Desk Support application in Windows:

1 Double-click the icon on your desktop that your administrator has set up on your desktop to access the Remedy Help Desk Support application.

If the application has been configured to prompt for login, the Login dialog box is displayed. Otherwise, the Remedy IT Service Management Console is displayed.

**2** If the Login dialog box is displayed, enter your user name and password, and click OK.

鼦Remedy <sup>.</sup>	Remedy IT Service Management
Quick Links New Request Search for Request Search Task Track Assets Other Reports Reminders	IT Service Management Console Assigned Requests Request D Summarv Requester Escalated? Status Priority Request Type Group TSK00000000008 Deamdavate I Sam Second No Scheduled Low IChange Taskil Support-IT Set H000000000000000 Cannot map [Francie Front No Assigned Medium Help Desk Ca Support-Softw HD0000000000044 Cannot save[Mark Market[No Work In Pto  High Help Desk Ca Support-Softw HD0000000000044 Cannot save[Mark Market[No Work In Pto  High Help Desk Ca Support-Softw
<u>Preferences</u> <u>Help</u>	View         Refresh           Bulletin Board         Priority           Create date         Priority           10/23/2002 355/39 FM         High           10/22/2002 355/39 FM         High           View         Create           Delete         Refresh

The Remedy IT Service Management Console is displayed.

You can now work on your requests as a member of the support staff.

In the Assigned Requests table, the first characters in the request ID indicate the type of request:

- HD identifies Help Desk cases.
- CHG identifies change requests.
- **TSK** identifies change tasks.
- ▶ To access the Remedy IT Service Management Console from a browser:
- 1 Launch your web browser and enter the URL designated by your administrator:

http://<web\_server>:<port>/arsys/apps/default/<ar\_server>/ITSMHD/ RemedySupport\_Administrator.jsp

where:

- *web\_server>* is the fully qualified name of the AR System mid tier that contains the web views of the Help Desk application.
- *<port>* is the port number used to connect to the web server, if it is other than the default port number of 80.
- <AR\_server> is the name of the AR System server on which the application is installed.



#### The Login screen appears.

鼦Remedy <sup>.</sup>	Remedy IT Service Management	F
	Welcome	
	Welcome	
	User Name*	
	Password	
	Authentication	
	Login Clear	
		*

- 2 Enter your AR System user name.
- **3** Enter your password.

**Note:** Unless your administrator has given you specific instructions, you can leave the Authentication field blank.

4 Click Login.

A dialog box appears, prompting you to select a console.

- **5** Select Support Console.
- 6 The Remedy IT Service Management Console is displayed.

盟Remedy <sup>.</sup>	Remedy IT Service Management					
Quick Links	IT Service Management Console					
New Request Search for Request	Assigned Requests You have no requests currently assigned to you. 0 entries returned - 0 entries matched					
Search Task	Request ID         Summary         Requester         Escalated?         Status         Priority         Request Type         Group					
<u>Track Assets</u>						
Other Reports						
<u>Reminders</u>						
Preferences	×					
<u>Help</u>						
Logout	View Refresh					
	Bulletin Board 2 entries returned - 2 entries matched					
	Create-date Priority Short-Description					
	10/23/02 High Engineering printer 3 is down					
	10/23/02 25 FR 40 Du High Voicemail is not accessible in Dallas office					
	View Create Delete Refresh					



## Working with the Remedy IT Service Management Console as support

The Remedy IT Service Management Console is the primary interface that you will use for your work in the support role. You can select the following items from the Support view of the Remedy IT Service Management Console:

#### **Quick Links**

- New Request
- Search for Request
- Search Task
- Track Assets

#### Other

- Reports
- Reminders
- Preferences
- Help
- Logout (web only)

The following paragraphs explain these options.

#### **New Request**

Click New Request to create a new request. The form that opens depends on how you have set your New Request Action preferences. See "Setting personal preferences and options" on page 66 for more information.

#### **Search for Request**

Select Search for Request to search for existing requests. The form that opens depends on how you have set your Search for Request Action preferences. See "Setting personal preferences and options" on page 66 for more information.

#### Search Task

Select Search Task to search for existing change tasks.

#### **Track Assets**

Select the Track Assets to display the Track Asset Information dialog box, from which you can create and search for assets and components.



#### Reports

Select Reports to generate predefined reports on help desk cases, change requests, and asset records. You can view reports with the built-in Crystal Reports viewer. For more information about reporting, see "Working with reports" on page 191.

#### Reminders

Select Reminders to create and display reminders. Reminders are sent by email or via AR System Alert.

#### Preferences

Select Preferences to select options for specifying the form that will open when you create or search for a request, and for specifying paging criteria (if your application is configured for paging).

#### Help

Select Help to display online help.

### Logout (Web only)

Click the Logout button to log out of the Remedy Help Desk application.

## Auto-fill feature in fields and lists

When a plus sign (+) is included in a field label on a form, you can enter part of the information and press Enter. If an exact match is found in the database, the system automatically completes the field. If a selection list appears, double-click on the selection you want to enter into the field. Using the autofill feature in fields and lists is faster, more consistent, and more accurate than typing the information yourself.

## Setting personal preferences and options

You can customize the Remedy Help Desk Support application by setting personal preferences and options. You can:

- Display and modify your personal record.
- Determine the forms that appear when you begin creating a new request.
- Determine the forms that appear when you search for a request.
- Specify criteria that determine how and when you are notified of request assignments by pager.
- Set the default form view.

## Changing your personal record

You can open your record and make changes to it through the Setup Personal Preference dialog box.

#### ► To change your personal record:

1 From the Remedy IT Service Management Console, click Preferences.

The Setup Personal Preference dialog box is displayed. By default, your name appears in the Login Name field. You cannot edit this field.

鼦Remedy <sup>.</sup>
Setup Personal Preference
Login Name*       Francie Frontline         General       Change Tasking       Help Desk         New Request Action       Open Front Line Support Dialog       Image: Compare Support Dialog         Search For Request Action       Open Selection Dialog       Image: Compare Support Dialog
Save Close

2 Click Profile.



	nforma	tion							
Login*	Francie	Frontline		Last Name*	Frontline		Support Staff?*	Yes	ľ
ID	3001			First Name	Francie		Туре*	Internal	ŀ
Status*	Active		•	Full Name*	Francie Frontline		VIP	No	ľ
				Training		B	Manager?	No	
Phone Num Fax Number		333-4243 444-4444		Department	Information Services	•	Web Page		

The Person Information form is displayed, containing your record.

- **3** Modify the appropriate fields.
- 4 When you have finished making changes to your record, click Save. A message reports that your record was modified.
- 5 Click OK.
- 6 Click Close to close the Setup Personal Preference dialog box.



## Setting New Request and Search for Request Action preferences

You can specify which form will appear when you begin creating a new request or start a search.

- ▶ To set New Request and Search for Request Action preferences:
- 1 From the Remedy IT Service Management Console, select Preferences.

The Setup Personal Preference dialog box appears. The General tab is displayed by default.

鼦Remedy <sup>.</sup>				
Setup Personal Preference				
Login Name* Francie Frontline Profile General Change Tasking Help Desk New Request Action Open Front Line Support Dialog Y Search For Request Action Open Selection Dialog Y				
Save Close				

- 2 In the New Request Action field, choose one of the following options. The option you choose determines what form is displayed when you click New Request on the Remedy IT Service Management Console:
  - Open Front Line Support Dialog—A generic New Request form opens. You can use this form to submit both help desk cases and change requests. It has fewer fields to fill in than the New Help Desk Case and New Change Request forms, and it can be used by frontline support staff to quickly log callers' requests of either type.
  - Open Help Desk Module—A New Help Desk Case form opens. This option is useful if you work only with help desk cases and do not usually work with change requests.
  - **Open Change Tasking Module**—A New Change Request form opens. This option is useful if you work only with change requests as a change supervisor or as a change implementor, and do not usually work with help desk cases.
  - Open Selection Dialog—A selection dialog box opens. You can choose to open either a New Help Desk Case or New Change Request form. This option is useful if you regularly work with both help desk cases and change requests.



- **3** In the Search For Request Action field, choose one of the following options. The option you choose determines what form is displayed when you click Search for Request on the Remedy IT Service Management Console:
  - Open Help Desk Module—A Search Help Desk Cases form is displayed. This option is useful if you work only with help desk cases and do not usually work with change requests.
  - Open Change Tasking Module—A Search Change Requests form is displayed. This option is useful if you work only with change requests as a change supervisor or change implementor and do not usually work with help desk cases.
  - Open a Selection Dialog—A selection dialog box is displayed. The dialog box presents the choice to open either the Help Desk module or the Change Tasking module. This option is useful if you regularly work with both help desk cases and change requests.
- 4 Click Save.

A message reports that the preference has been saved.

5 When you have finished setting preferences, click Close.

## Setting paging type and paging criteria preferences

You are always notified when a request is assigned to you. Paging preferences enable you to specify how you will be notified through paging.

- ▶ To set paging type and paging criteria preferences:
- 1 From the Remedy IT Service Management Console, select Preferences.

The Setup Personal Preference dialog box is displayed.

**2** Click the Help Desk tab.

General Change Tasking Help Desk	
Paging Criteria Paging Type T Priority T	When To Send Page       Always?       For Escalated Calls?       For Hotlist?



- 3 In the Paging Type field, make the following selections:
  - Command line—Select this option if you are using third-party paging software. This option uses the third-party software command line to send out a page by way of their software.
  - Email—Select this option if you want page notifications sent by email.

**Note:** Your administrator must configure your application to enable you to receive pages by email.

- **4** Under When to Send Page, select an option to specify when you will be notified:
  - Always? notifies you whenever a help desk case or change request is assigned to you, regardless of priority.
  - For Escalated Calls? notifies you whenever a help desk case or change request is assigned to you and has been escalated.
  - For Hotlists? notifies you whenever a VIP creates a request that is assigned to you.
- 5 If you have selected For Escalated Calls? or for Hotlists?, specify the minimum priority a request must have for you to be paged. For example, if you set the priority to Medium, you will be paged for all requests with priority Medium or higher.
- **6** Click the Change Tasking tab, and select the Paging Type and Paging Criteria options for the Change Tasking module.

General Change Tasking Help Desk						
Paging Cri	teria	When To Send Page				
Paging Type	Command Line 💌	Always?	•			
Priority		For Escalated Calls?	•			
		For Hotlist?	•			

The Paging Type and Paging Criteria options are the same as for the Help Desk module, described in the previous steps.

7 Click Save.

A message reports that the preference has been saved.

- 8 Click OK to dismiss the message.
- 9 When you have finished setting preferences, click Close.

## Setting the default form view

The Remedy Help Desk application is preconfigured by your application administrator. You can override options set for you by the administrator, and customize them to meet your needs.

If you are using the Remedy IT Service Management Console, or if you are using the web, the default form view is already set for you. If you do not use the Remedy IT Service Management console and you access forms directly in the AR System User Tool, you can set the default form view in Options dialog box.

Use the following procedure to set the default form view if you access forms directly in the AR System User Tool instead of through the Remedy IT Service Management Console. This procedure applies to Windows only. For detailed information about customizing other options, refer to AR System User Tool Help.

#### ► To set the default form view in Windows:

- In the AR System User Tool, choose Tools > Options. The Options dialog box is displayed.
- 2 Click the Advanced tab.

🕼 Options					? ×
General Reports	Behaviors Advanced	Display	Col ng	or   Locale	Confirmation   File
Forms Default Fo	orm View: y Hidden Form:	Support			
Table Field	-				
Reports Report Se		erver	TCP	R	PC
Use this program to preview reports: (Note: A simple text editor, such as WordPad, is recommended.)					
				OK	Cancel

**3** In the Default Form View field, enter the name of view that you want to appear when the application is started:



- **Requester**—Used by requesters to create their own requests.
- **Support**—Used by support staff to work with help desk cases, change requests, change tasks, asset records, and reports.
- 4 Click OK.
- **5** If you have any Remedy Help Desk form windows open, close and reopen them.

The Default Form View takes effect after you reopen the form window to which the view applies, or at the next login.

## Using the Bulletin Board

The Bulletin Board lists messages that you can view. You can also create messages to be viewed by the entire organization or by users in the support, management, and administrator groups. Bulletin board messages can be sent as notifications to support staff members.

Bulletin Board						
Create-date	Priority	Short-Description				
Wednesday, October 23, 2002 3:54:32	High	Engineering printer 3 is down				
Wednesday, October 23, 2002 3:55:49	High	Voicemail is not accessible in Dallas offic				
View Create Delete R	efresh					

## **Viewing Bulletin Board messages**

You can view Bulletin Board messages from the Remedy IT Service Management Console or from within a form.

- ► To view a Bulletin Board message:
- 1 In the Bulletin Board table on the Remedy IT Service Management Console, select a message, and click View.



The selected Bulletin Board message is displayed.

鼦Remedy <sup>.</sup>		<u>~</u>	$\sim 2$
Bulletin Detai	Is		
Post Message to?*	Support	Priority*	High
		Notify Support*	Yes
Message Details			
Short Description*	Engineering printer 3 is down		
Details			
Attachments		Attach Label Attachment1	
		recontrol er	
	Add Delete Display	Save To Disk	
Save Close	J		

If the message incudes an attachment, you can view the attachment and save it. For more information, see "Viewing and saving attachments in Bulletin Board messages."

- 2 When you are finished viewing the message, click Close.
- **3** Click Close to close the Bulletin Board, if applicable.

## Viewing and saving attachments in Bulletin Board messages

You can open and view attachments included with Bulletin Board messages, and save them to your computer.

- ► To view an attachment:
- Click on the file name of the attachment, and click Display. The attachment opens.

#### ► To save an attachment:

1 Click on the attachment you want to save.

File Name	Max Size	Attach Label	
printer_issue.txt	1 KB	Attachment1	
Add Delete [	)isplay Save	e To Disk	

2 Click Save to Disk.



The Save Attachment dialog box is displayed.

- 3 Select the directory where you want to save the attachment.
- 4 Click Save.

The file is saved to the selected directory on your computer.

#### ► To create a Bulletin Board message:

1 In the Bulletin Board table on the Remedy IT Service Management Console, click Create.

The Bulletin dialog box is displayed.

盟Remedy <sup>.</sup>			<b>\$</b>	$\sim$	
Post Message to?*	Support		Priority* Notify Support*	Medium No	•
Message Details Short Description* Details					
Attachments	File Name	Size	Attachment Attachment1		
Save Close	J				

- 2 In the Post Message to? field, select Public or Support.
  - Public enables everyone, including requesters, to view the message. When you select this option, the following three additional fields appear, with drop-down boxes that enable you to specify distribution options for the message.
    - **Region**—Typically specifies a country, such as United States, France, or Singapore.
    - Site—Typically specifies a particular location within a region, such as a mailing address or office building.
    - **Department**—Typically specifies a department or workgroup.
  - Support enables only users in the support, management, and administrator groups to view this bulletin.
- **3** In the Priority field, select the priority of the message.



4 In the Notify Support field, select Yes or No.

If you select Yes, support staff members will be notified of this message, based on the notification method specified in their personal profile.

- 5 In the Short Description field, enter a brief description of the message.
- 6 In the Detailed Description field, enter the text of the message.
- 7 To attach a file to the message:
  - a Click the Add button below the attachments table.
    - The Add Attachment dialog box is displayed.
  - b Select the file you want to add as an attachment, and click Open.The file name is added to the list in the Attachments field.
- 8 Click Save.

A message reports that the message has been added to the Bulletin Board.

- 9 Click OK.
- 10 Click Close.

#### ► To modify a Bulletin Board message:

- 1 In the Bulletin Board table on the Remedy IT Service Management Console, select the message you want to modify, and click View.
- 2 Modify the applicable fields.
- **3** Click Save.

A message reports that the bulletin has been modified.

- 4 Click OK.
- 5 Click Close.

## ► To delete a Bulletin Board message:

- 1 In the Bulletin Board table on the Remedy IT Service Management Console, select the message you want to delete. You can delete only the messages that you have created.
- 2 Click Delete Message.

A message reports that the bulletin has been deleted.

3 Click OK.



# **Using reminders**

Reminders enable you to create notes for yourself and others. You can send them by email or by way of AR System Alert, and you can specify when they will be sent.

You can create generic reminders, or you can create reminders that are associated with a specific request. For example, you can send yourself a note about a help desk case to remind yourself to follow up on the case.

Whether you access reminders from the Remedy IT Service Management Console or from within a request determines which reminders you will be able to view:

- When you open the Reminders dialog box from the Remedy IT Service Management Console, you can view all reminders that you have created.
- When you open reminders from within a request (if you have a request form open), you can view all reminders associated with that request. This includes reminders created by other users of Remedy Help Desk.

You can modify or delete only reminders that you have created.

#### ► To create a reminder:

- 1 From the Remedy IT Service Management Console, click Reminders. The Reminders dialog box is displayed.
- 2 Click the Create Reminder tab.

eminders		
Link to Request-ID Form Notification* Time*+	Notify*     Individual       Recipient*+     Joe User       AR Login     Joe User        Email	Profile
Subject		



**3** To associate the reminder with a specific request, enter the request ID with which you want to associate the reminder.

If you opened the Reminders dialog box from within a request, this field is automatically filled in with the appropriate request ID. You can delete the field ID if you do not want to associate the reminder with this request.

4 In the Form field, enter the form name with which you want to associate the reminder. This indicates that the reminder pertains to a help desk case or a change request.

If you opened the Reminders dialog box from within a request, this field is automatically filled in with the appropriate form name. You can delete the form name if you do not want to associate the reminder with this form.

- 5 Select one of the following notification methods from the Notification field:
  - Notifier sends the reminder through AR System Alert. You must fill in the AR Login field to use this notification method.
  - Email sends the reminder by email. You must fill in the Email field to use this notification method.
  - User Default sends the reminder based on the notification method specified by the administrator for that user.
- **6** By default, the Time field contains the current date and time. Change this to the time that you want the system to send the reminder. You can enter a time, or click the button next to the field and select the time from the calendar that is displayed. To have the reminder sent immediately, enter **\$TIMESTAMP\$**.
- 7 In the Notify option fields, select Individual or Group.
- 8 Enter the name of the person or group that you want to notify in the Recipient field.

If you do not know the name, you can perform a search:

**a** Position the cursor in the field, and press Enter.

The Search People or Search Group dialog box is displayed.

- **b** Enter the search criteria in the appropriate fields.
- c Click Search.

If people or groups matching the search criteria exist, their records are listed in the table.

d In the table, select the person or group that you want to notify, and click OK.



The fields in the Create Reminder tab are filled in with that person's or group's information.

**9** To view more detailed information about the person or group that you have selected, click Profile.

The Person Information or Group Information form is displayed. You cannot make changes in this form. When you have finished reviewing it, click Close.

- **10** In the Subject field, enter information about the reminder.
- 11 In the Message field, enter the reminder message.

**Note:** Do not enter anything in the Log field. This field records the subject line and message of the reminder when it is sent.

- 12 Click Save.
- **13** Click Close to close the Reminders dialog box.

The reminder will be sent at the time you specified.

#### ► To view and modify existing reminders:

1 From the Remedy IT Service Management Console, or from a form, click Reminders.

The Reminders dialog box is displayed, showing existing reminders.

If you opened the dialog box from the Remedy IT Service Management Console, all reminders that you created are displayed. If you opened the dialog box from a request, only the reminders associated with that request are displayed.

- 2 In the Show Reminders field, select the type of reminders you want to view. Choices are All, Pending, and Sent.
- **3** Select a reminder, and click View.

# 

## The selected reminder is displayed.

盟Remedy <sup>.</sup>			and?		
Reminder Det	ails				
Link to Request ID		Notify*	Individual 💌		
Form		Recipient*+	Francie Frontline		Profile
Notification*	Notifier	AR Login	Francie Frontline		
Time*+	4/28/03 6:05:51 PM	Email	francie		
Subject	Printer issues				
Message*	We have some new printer issues	reported by the	team.		
Log				Û	Write to Log
	Save Close				

4 Update the reminder as needed, and click Save.

**Note:** If the reminder you selected has already been sent, it is not saved, and you will have to create a new reminder.

A message reports that the reminder has been modified.

- 5 Click Close to close the reminder.
- 6 Click Close to close the Reminders dialog box.

## • To delete existing reminders:

1 From the Remedy IT Service Management Console, click Reminders.

The Reminders dialog box is displayed.

If you opened the dialog box from the Remedy IT Service Management Console, all reminders that you created are displayed. If you opened the dialog box from a request, only the reminders associated with that request are displayed.

2 In the Show Reminders field, select the type of reminders that you want to view. Choices are All, Pending, and Sent.

The reminders appear in the table.

- **3** Select the reminder you want to delete.
- 4 Click Delete.

A message reports that the reminder has been deleted.

5 Click OK.



# Working with table data

When working in the Remedy Help Desk Support application, you will frequently work with tables that display data, such as the Assigned Requests list on the Remedy IT Service Management Console. You can update the data within these tables, sort the data, and print it.

# Updating table data

You can retrieve the latest data in a table using the following methods:

- ► To update table data:
- Click the Refresh button below the table. The latest data is loaded into the table.

In Windows, you can also right-click anywhere in the table and select an option from the menu.

- **Refresh** Table loads the latest data into the table. The administrator can set a limit on how many records are loaded into the table. The status bar of the main window indicates how many records are loaded.
- Refresh All in Table loads the latest data into the table and overrides any limitations the administrator may have set on how many records can be returned. Note that if many records are returned, your server's performance may be slower.
- Clear Table removes the table data. To view any new data, click in the table.

If necessary, use the scroll bar at the right to scroll through the entries in the table.

To view the details of a request in the table, select the request, and click View.

# Sorting table data

You can sort table data for more convenient viewing.

#### To sort table data:

 Click on the header of the column by which you want to sort the table. The list of items is ordered according to that column. 2 To reverse the sort order within that column, click the column header again.

# **Printing table data**

You can print the data in a table using either of the following methods:

#### ► To print data from any table:

- 1 Choose File > Print.
- 2 In the print dialog box, select printing options, and click OK.An image of the table is printed. Only the entries currently in view on the screen are included.

## ► To print table data in Windows:

- 1 Right-click on the table.
- 2 From the context menu that appears, choose Print Table.

The Print dialog box appears.

- **3** Enter the printing specifications.
- 4 Click OK.

A list of all items in the table is printed, including those that are not in view.



# **Exiting the Help Desk application**

- ▶ To exit the Help Desk application from Windows:
- Close the Remedy IT Service Management Console window, or choose File > Exit.
- To exit the Help Desk application from the web:
- Click Logout.

A message appears confirming your logout. You can either close the browser window or log back in.

# **4** Working with the Help Desk Module as Support

Support staff members answer questions, resolve problems, and fulfill requests. The Help Desk module of the Remedy Help Desk Support application enables support staff to log and track help desk cases. After a case is created—either by a requester or a first-level support staff member—the case is automatically assigned to the appropriate group or individual for the case, based on your organization's support staff groupings and criteria created by your administrator. Staff members are notified of cases assigned to them by email, paging, or AR System Alert.

When a case is assigned, support staff members can log their progress as they resolve the case. When a support staff member changes the status of a case to Resolved, the system notifies the requester that the case is resolved.

This section provides information about the Support view of the Remedy Help Desk application and the activities you can perform as a support staff member.

This section includes the following topics:

- "Creating new requests" on page 84
- "How help desk cases are assigned" on page 94
- "Working with existing help desk cases" on page 97
- "Working with Problem Management" on page 114



# **Creating new requests**

When you create a new request, you can create a generic request or a help desk case, depending on the form you selected to use in your personal preferences.

- New Request is a generic form that is displayed if you selected Open Frontline Support Dialog in your personal preferences. It is useful for frontline support in situations where the support technician is handling multiple calls simultaneously. This form allows support staff to enter request data quickly, save the request, and move on to the next call. Definitions set by your administrator in the Remedy Configuration Manager determine whether a change request or a help desk case is created and to whom the request is assigned.
- Help Desk Case is a form from which you can create only help desk cases.

For information about setting preferences, see "Setting personal preferences and options" on page 66.

# Creating a generic new request—Help Desk or Change Tasking

To have the generic New Request form appear when you begin creating a new request, you might need to set your personal preferences to Open Front Line Dialog option in the New Request Action field. See "Setting New Request and Search for Request Action preferences" on page 68 for more information. The following procedure assumes that you selected the Open Front Line Support Dialog option as the New Request Action preference.

#### • To create a new request in the New Request form:

1 On the Remedy IT Service Management Console, click New Request. The generic New Request form is displayed.

	Service Management
New Request	
Summary*	Category
Description*	Туре
Status	ltem 🔽
WorkLog	<b>m</b>
Requester Information	
Login*+	Profile Region
VIP	Site
Phone	Department
Urgency	Office
Requester's Assets	Requester's Open Requests
Asset ID Name Status	Request ID Summary Status Assigned Applicatic Escalated
Click to Refresh	Olick to Refeeth
LUCK TO PREVENT	Linux tu mentern
View Refresh	View Refresh
Save Solution Available! Reports Bulletin B	oard Reminders Close Help

2 In the Summary field, select an existing summary for the request, or enter a description of the issue or request.

If the contents of the Summary field match a value predefined by the administrator, the Detailed Description, Category, Type, and Item fields are filled in automatically. You can accept these values, or change them.

If the Solution Available! button becomes enabled, possible solutions are available in the database for the case. For more information, see "To search for possible solutions when creating a new case in the Generic New Request form:" on page 104.

3 In the Description field, enter a description of the request.

If you selected a predefined summary, the Description field will be filled by default with the text of the Summary field. You can add to or modify this text.

- **4** In the Status field, select New, or leave it blank The status is automatically changed to Assigned when the new case is saved.
- 5 In the Work Log field, enter any relevant information about the request.
- 6 In the Login field, enter the requester's login name, and press Enter.

If the requester has already been entered into the People database, the Phone, Office, VIP, Region, Site, and Department fields are filled in automatically.

If the requester has not yet been entered in the database, the Search People dialog box is displayed. You can use it to search the database for records. For more information, see "Searching for a requester" on page 90.

If you cannot find the person, you can create a record for them in the database. For more information, see "To create a requester record:" on page 92.

- 7 You can view the requester's assets and open requests. To view a request or an asset record, select it, and click View.
- 8 If the Category, Type, and Item fields were not filled in automatically, or if you want to change them, select the appropriate values.
- **9** If the Region, Site, and Department fields were not filled in automatically, or if you want to change them, enter appropriate information. If you change them, you will be asked whether you want to update the requester's user profile.
- 10 In the Urgency field, select the user's urgency level for the request.
- 11 Click Save to create the request and submit it to the database.

## Creating a new help desk case

To have the Help Desk Case form appear when you create a new request, you might need to set your personal preferences and select the Open Help Desk Case Module option in the New Request Action field. See "Setting New Request and Search for Request Action preferences" on page 68 for more information. The following procedure assumes that you selected the Open Help Desk Case option.



▶ To create a new help desk case in a Help Desk Case form:

 On the Remedy IT Service Management Console, click New Request. The Help Desk Case form is displayed.

鼦Remedy <sup>.</sup>	Remedy H	lelp Desl	<		$\sim$		
Help Desk Ca	se						
Summary*				<b>•</b>	Case Type* In	cident	•
Description*					Status* Ne	BW	•
Category*	•	Case ID+	HD		Pending		•
Туре*	-	Service		-	Closure Code		-
ltem*	•	Group+		-	Escalated? No	ס	•
Auto-ReAssign		Individual+		-	Priority* Lo	w	•
Requester Information	Activity Solutions Related	tems Proble	m Management				
Login*+		Region		-	Source*	Phone	•
Name*+	Profile	Site		-	Submitted by	Francie Frontline	
VIP No	•	Department		-	Urgency	Low	•
Phone		Office			Confirm Resolutio	n	-
Requester's Case	2		Requester	's Assets			
Case ID+ Summary	Status Category Type	Item	Asset ID 5	Serial Num Asse	et Nam Category	Type Item	
	Click to Refresh				Sick to Refresh		
View Refresh	J		View	Refresh			
Save Print Case	e Reports Bulletin Board	Reminders	Close				<u>Help</u>

**2** In the Summary field, select an existing summary for the request, or enter your own description.

If the contents of the Summary field match a value predefined by the administrator, the Detailed Description, Category, Type, and Item fields are filled in automatically. You can accept these values, or change them.

- Category—The menu items that you can choose are determined by your administrator. The category field is the broadest categorization of the case. For example, case categories could include Hardware, Software, or Network.
- Type—The menu items that you can choose are determined by your administrator and the value you selected for the Category field. The Type field identifies the case with more precision. For example, case types could include Printers, Servers, or Workstations.
- Item—The menu items that you can choose are determined by your administrator and the values you selected for the Category and Type fields. The Item field is the most detailed of the categorization fields. For example, case items could include product, model, or component names.
- 3 In the Description field, enter a description of the case.



- 4 If you selected a predefined summary, the Description field will be filled by default with the text of the Summary field. You can add to or modify this text.
- 5 In the Service field, select a type of service, if any, for the case.

The selections available depend on how your administrator has configured this menu for the service agreement types pertinent to your organization. For example, your administrator might set up the menu to reflect specific types of warranties.

- **6** In the Group and Individual fields, select the appropriate group and individual names as assignees.
- 7 In the Case Type field, select the type of case:
  - Incident—A general indication of a condition that needs attention. By default, every new case is classified as an Incident.
  - Question—A case that involves a question. For example, a user needs to know the name of the print server.
  - Request—A case that involves a request for service. For example, a user's computer might not have enough memory. A change request might also be created to obtain additional memory.
  - **Problem**—A case that involves an issue that the support staff must resolve. For example, several requesters might have submitted tickets because they cannot access a printer. These tickets indicate that access to the printer is a problem.

As you become familiar with the case, you can change the type

- 8 In the Status field, select New, or leave it blank. The status is automatically changed to Assigned when the new case is saved.
- **9** If the case is dependent upon an external action (such as ordering of new hardware), and the status of the case is Pending, make the appropriate selection in the Pending field.
- 10 Leave the Close Code field blank for now.

When a request is resolved, the Closure Code can provide useful information about the level of success in resolving the case. If you leave the Closure Code field blank, the application will close the case automatically after a specified time following its resolution. Your administrator specifies this automatic closure time.

- 11 In the Escalated? field, accept the default value of No if you are not sure if the case should be escalated. If you find that the case needs to be escalated, you can change this value to Yes later.
- 12 In the Priority field, select the priority level of the case.



The significance of each priority level is determined by your administrator.

- 13 In the Login Name or Name field in the Requester Information tab, enter the requester's name and press Enter. One of the following happens:
  - If the requester is already entered in the People database, the remaining fields in the tab are automatically filled in, and the requester's open cases and assets are listed in the tables.
  - If the requester does not have a record in the People database, the Search People dialog box is displayed. You can search for the requester to see if a record exists. For more information, see "Searching for a requester" on page 90.
- 14 If no record for the requester exists, you can create it. For more information, see "To create a requester record:" on page 92.
- 15 In the Source field, select the source of the help desk case:
  - Phone—If the requester phoned the help desk directly, select Phone.
  - **Requester**—If the requester submitted the case from the Remedy Help Desk application, Requester will be selected.
  - Email—If the requester submitted the case by email, select Email.
  - Web—If the requester submitted the case by using ARWeb, select Web.
  - NMP—If the case originates from a network management program, select NMP.
- 16 In the Submitted By field, enter the name of the person who reported the case, if different from the person actually submitting the request. For example, a user might have reported the problem by submitting a help desk ticket, in which case the user is also the requester. If the user reported the problem by way of phone or email, the person who took down the information and submitted the ticket on the user's behalf is the requester.
- 17 In the Urgency field, select the urgency of the case.

The following steps are optional. To skip them, go to step 21.

- 18 Click the Solutions tab, and look for possible solutions. For more information about solutions, see "To search for possible solutions when working in the Help Desk Case form:" on page 106.
- **19** Click the Related Items tab to relate other items to this case.

For more information about related items, see "Working with related items" on page 139.

20 Click the Problem Management tab to organize information about this case.



For more information, see "Working with Problem Management" on page 114.

21 Click Save to create the new help desk case.

A message tells you to whom the help desk case has been assigned.

**22** Click OK to dismiss the message.

Once a case is assigned, click the Activity tab, and enter the estimated amount of time (in minutes) required to complete this request.

Requester Information Activity Solutions Related Items Problem Management	
Case Log	Time Information
Work Log	Assigned
	Resolved
Time Spent Resolving Case	Anival Time
Estimated Total Time 0 🚊 Start TimeStart Clock Stop Clock	Other Activities Request Reassignment No
Time Spent (min) 0	

# Searching for a requester

If you are not sure if a requester has an existing record in the People database, you can perform a search. You can view the requester's record and, if necessary, modify it. You can perform the following procedure from any form that has a Login Name or Name field.

- 1 In the Requester Information tab of the form, click in the Login or Name field, and enter any information you know about the individual you are looking for, or leave the field blank.
- 2 Without moving the cursor from the field, press Enter.



medy <sup>.</sup>				
Search Criteria	E			
Last Name		Departme	ent	
Full Name		Login Na	me	
Se	arch Clear	Fields		
Search Result	s			
Last Name Fi	rst Name Req	jion Sit	Э	Department
	Chi.	sk to Refresh		
View				
OK Cancel				

The Search People dialog box is displayed, listing any matching records.

- 3 Enter search criteria in the appropriate fields.
- 4 Click Search.

The Search Results table shows the matching records.

盟Remedy <sup>.</sup>				
Search Cr	iteria			
Last Name D	emo		Department	
Full Name			Login Name	
	Search	Clear Fields		
Search Re	esults			
Last Name	First Name	Region	Site	Department
Demo		USA	1505 Saladi	o, Mo Information Servic
View				
OK Ca	ancel			

**5** To view a record, select it, and click View.



The Person Information form is displayed.

	ſ	Remedy IT S	ervice Management		
Person Inf	ormation				
	Francie Frontline 3001 Active Address Financials	Last Name First Name Full Name* Training	Frontline Francie Francie	Support Staff?* Type* VIP Manager?	Yes  Internal No No
Notification I Email Address Phone Number Fax Number		Region Site Department	USA Vountain	Office Manager's Name+ Web Page	1A Demo
Save C	lose				<u>Help</u>

- 6 To make changes, update the appropriate fields, and click Save.
- 7 Click Close.

## Creating a requester record

The People database contains all Remedy Help Desk application user records. Information stored here is used to automatically fill in requester information fields in many forms.

While creating a new request, you might find that the requester does not yet have a record in the database. If no record exists for the requester, you can create one using the Person Information form.

#### ► To create a requester record:

- 1 Perform the steps for creating a new request as described in "Creating a generic new request—Help Desk or Change Tasking" on page 85, or "To create a new help desk case in a Help Desk Case form:" on page 87.
- 2 In the New Request form or in the Requester Information tab of the New Help Desk Case form, click Profile.



#### The Person Information form is displayed.

鼦Remedy <sup>.</sup>	Remedy IT Service Management	
Person Information		
Login"   ID Status"   Contact Pager Address Financials	Last Name* First Name First Name Full Name* Training	Support Staff?"  Type"  VIP  Manager?
Notification Method* Email Address Phone Number Fax Number	Region       Site       Department	Office Manager's Name+ Web Page
Save Close		<u>Help</u>

- 3 Fill in the following required fields.
  - Login Name—Enter the requester's login name (the name used to log in to the application; this name is case-sensitive and space-sensitive).
  - Status—Select Active.
  - Last Name—Enter the requester's last name.
  - Full Name—Enter the requester's first and last name.
  - Support Staff—Select Yes or No to indicate if the requester is a support staff member.
  - Type—Select Internal if the requester is an employee of your organization, or External if the requester belongs to another organization.
  - Notification Method—Select how the requester will be notified upon case and other status resolution. If you select Email, you must also enter the requester's email address.
- 4 Optionally, fill in the other fields, including fields on the other tabs.
  - The Pager tab shows information about software and parameters for paging equipment, and contact information for this requester.
  - The Address tab shows the requester's mailing address.



- The Financials tab shows the cost accounting and cost center information associated with the requester. The Accounting Code and cost center data is configured by the administrator initially, but can be modified by support staff.
- 5 Click Save.

A message reports that the new requester entry was created.

If the requester's information changes, you can update it in the Person Information form.

#### ► To modify requester information:

- 1 Open the Person Information form using either of these methods:
  - Enter the requester's name in a form, and click the Profile button.
  - Search for the requester in the Search People dialog box. Select the requester's record and click View. For more information, see "Searching for a requester" on page 90.

The Person Information form is displayed, containing the requester's information.

- **2** Update the applicable fields.
- 3 Click Save.

# How help desk cases are assigned

Cases are assigned to support staff members through the auto-assignment and auto-reassignment features of the Remedy Help Desk application. When a case is submitted, it is assigned to an individual or a group, depending on your administrator's configuration. The assigned individual or each member of the group is notified. Members of the group can assign or reassign the case to themselves or to other people in the group.

When a case is assigned to you, you can be notified by pager (if you have set paging preferences), email, or notifications sent to AR System Alert. The notification method depends on how your system is configured.

# Receiving notification of case assignments

Depending on the Notification Alert method determined by the Help Desk administrator, AR System Alert can notify you when a case has been assigned to you, or when progress has been made in resolving a case.

For more information about AR System Alert, see the AR System User Tool Help.

- ▶ To receive notification of case assignment by AR System Alert:
- 1 Log in to AR System Alert as a Support staff member.

When you or your group receive a notification that you or your group have been assigned to a case, the information appears in AR System Alert.

2 Open the Alert Summary dialog box.

The number of alerts sent to each server is listed.

3 Click Open Alert List.

The list of alerts is displayed.

4 To view an alert for a case assignment, double-click it.

The assigned case opens in its form. For information about changing the request, see "To modify a help desk case:" on page 100.

#### ► To receive notification of case assignment by email:

- 1 When you receive email notifying you or your group that you have been assigned to a help desk case, note the request ID.
- 2 Log in to Remedy Help Desk Support.
- 3 Locate and open the case. You can do this in one of two ways:
  - Select the case in the Assigned Requests table of the Remedy IT Service Management Console, and click View.
  - Search for the case. For more details, see "To search for a help desk case:" on page 98.

The case is displayed in the Modify Help Desk Case form. You can now modify the case as necessary.



# Working with help desk case assignments

If a case is assigned to you, you must accept the case. If a case is assigned to your group but not to an individual, you can assign the case to yourself. If the case is assigned to you, your name appears in the Individual field in the Activity tab.

- ► To accept an assigned help desk case:
- 1 In the Remedy IT Service Management Console, select the case in the Assigned Requests table, and click View.

The case is displayed.

- 2 If you are assigned to a group, select your name from the Individual field.
- **3** Set the Status field to Work in Progress if you are ready to start working on the case.
- 4 Click the Activity tab, and update the Work Log field with any relevant information about the case.
- 5 Click Save.

A message reports that the case is assigned to you, and that the requester has been informed of the case assignment.

6 Click Close to dismiss the message.

# Reassigning a help desk case

If a help desk case is assigned to you, your name appears in the Individual field in the Activity tab. If you cannot or do not want to work on an assigned case, you can reassign the case to another support staff member, or ask the help desk manager to reassign it to someone else. The manager can then reassign the case, or deny your request.

- **Note:** If the Category, Type, or Item information for a case is changed, and Auto-Reassignment is enabled, the case might be reassigned automatically to another member of the support staff. When the case is reassigned, both the new and old assignee are notified.
- ► To request reassignment of a help desk case:
- 1 Select the case in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The case is displayed.

2 Click the Activity tab.



3 In the Request Reassignment? field, select Yes.

A message informs you that your manager will be notified about the reassignment of the case.

- 4 Click Yes.
- 5 Click Save.

A message reports that your manager has been notified of the reassignment request.

6 Click OK.

Your manager is notified of the reassignment request. You are notified when the manager approves or rejects the request. Until the manager actually reassigns the case, you remain assigned to, and responsible for, the case.

# Working with existing help desk cases

The normal cycle of a help desk case consists of these steps:

- 1 A new case is created, using either of the following methods:
  - The requester can enter the case directly using the Remedy Help Desk Requester application.
  - Or, the requester can contact the frontline support staff by email or telephone. The frontline support staff then enters the case into the Remedy Help Desk Support application.
- **2** If the frontline support person cannot resolve the case, it is assigned to the appropriate group or individual. When a case is assigned to backline support staff, they are notified by email or by AR System Alert.
- **3** The backline support staff member logs the progress while working on the case.
- 4 When a case is resolved, a support staff member changes the case status to Resolved, and the system notifies the requester that the case has been resolved.
- **5** Once the requester is notified of the change of status, they can close the case by setting the Confirm Resolution to Close Case. The requester is prompted to complete a customer satisfaction survey. If the requester does not reopen or close the case, the case closes automatically after a time specified by the administrator.



# Searching for help desk cases

The help desk cases and change requests that are assigned to you are automatically listed in the Remedy IT Service Management Console.

When you perform a search for a case, the form that is displayed depends on what you selected in the Search For Request field. See "Setting New Request and Search for Request Action preferences" on page 68 for more information. The following procedure assumes that you selected the Open Selection Dialog option as the default Search For Request Action preference.

- To search for a help desk case:
- 1 On the IT Service Management Console, click Search for Request.
- 2 In the dialog box that appears, select Help Desk Case.

The Help Desk Case form is displayed.

3 Fill in the appropriate fields with the criteria to define your search.

To use the advanced search bar, choose View > Advanced Search Bar.

A row of buttons, a Search Criteria field, and a Fields button is displayed.

You can use this bar to specify complex search criteria. For detailed information about using the advanced search bar, see AR System User Tool Help. To access AR System User Tool Help, choose Help > Contents and Index.

4 Click Search.

The requests matching the search criteria are displayed in the Results pane.

5 To view the details of a help desk case, click on the item in the list. The case is displayed in the Details pane.

## • To view your group's open cases in Windows:

- On the Remedy Support Console, click Search for Request. The Help Desk Case form is displayed.
- 2 Choose Actions > Defined Searches > List Group's Open Cases.
   Your group's open cases are displayed in the Results pane.
   To view the details of a help desk case, select it, and click View.



#### ► To view your group's open cases on the web:

- 1 On the IT Service Management console, click Search for Request.
- 2 The Help Desk Case form is displayed.
- **3** Click Advanced Search.
- 5 Click Search.
- **6** Your group's open cases will be listed in the table below the Help Desk Case form.
- 7 To view the details of a case, select it, and click View.
- ► To view your own open cases in Windows:
- On the Remedy Support Console, click Search for Request. The Help Desk Case form is displayed.
- 2 Choose Actions > Defined Searches > List My Open Cases.Your open cases are displayed in the Results pane.
- 3 To view the details of a help desk case, select it, and click View.
- ► To view your own open cases on the web:
- 1 On the IT Service Management Console, click Search for Request.
- 2 The Help Desk Case form is displayed.
- 3 Click Advanced Search.
- 5 Click Search.
- 6 Your open cases will be listed in the table below the Help Desk Case form.
- 7 To view the details of a case, select it, and click View.

# Modifying existing help desk cases

As you work on resolving a case, you will need to modify it occasionally. For example, you can track the progress of a case by recording in the work log the steps you took to resolve it.



- ► To modify a help desk case:
- 1 Locate the case that you want to modify:
  - On the Remedy IT Service Management Console, select the case from the Assigned Requests list, and click View.

Or

 Search for the case, as described in "To search for a help desk case:" on page 98.

The request is displayed.

2 Click the Activity tab.

Requester Information Activity Solutions Related Items Problem Management		
Case Log Work Log	Û	Time Information Assigned Resolved
Time Spent Resolving Case           Estimated Total Time         0           Start Time		Anival Time
Time Spent (min) 0		
Save Print Case Reports Bulletin Board Reminders Close		Help

- **3** Record case activity in the appropriate fields, including:
  - Work Log—Enter any information relevant to the case.
  - Time Spent—In the Time Spent (Min) field, enter the number of minutes spent working on the case during your current login session. The application keeps a running total of the time spent in the Total Time Spent (Min) field.
  - The Assigned, Resolved, and Arrival Time fields are filled in automatically.
- 4 When you have finished updating the request, click Save.

# Working with duplicate help desk cases

As you are creating a new case or reviewing an existing case, you can see if it is a duplicate of an existing case. Duplicate cases have matching Category, Type, and Item fields, as well as similar Description and Summary fields.



For example, you create a help desk case for a requester who has not received external email for the past hour. Because this might be a more widespread problem, you decide to look for possible duplicate cases. You look for a recent case that might be reporting the same problem.

When you check the case details of a recent case, you discover that a case submitted by another requester also reports the external email problem. In this situation, you would mark the most recent case as a duplicate of the original case.

Once you mark the case as a duplicate, you cannot update it. When the original case is resolved, the duplicate is automatically resolved.

If you have erroneously marked a case as duplicate, you can remove the duplicate case. This enables you to update and resolve the original case.

## ► To identify and mark duplicate cases:

1 Search for requests, as described in "To search for a help desk case:" on page 98.

The requests matching the search criteria are displayed in the Results pane.

- 2 Select the request that you think is a duplicate.
- **3** Click the Duplicates tab.

If there are no potential duplicates, the tab displays the following message "No other cases matching Category, Type, and Item of this case were found."

4 Click the Potential Duplicates list to refresh it.

The list shows any cases that are potential duplicates of the request.

quester Information Activity Duplicates Solutions Related Items Problem	Management		
Potential Duplicates			
Case ID Summary	Status	Dup ID	
HD000000000065 Printer is not printing	Assigned		
Refresh View Mark As Duplicate Mark As Original			

**5** To determine whether a case is a duplicate, select the entry, and click View. The Help Desk Case form is displayed, showing the details of the case.



- 6 Review the case to determine whether it is a duplicate.
- 7 Click Close to return to the original case.
- 8 If the case is a duplicate, take one of the following steps:
  - In the Potential Duplicates list, click Mark as Duplicate to make the selected case a duplicate of the current case.

Potential Duplicates		
Case ID Summary	Status	Dup ID
HD 00000000065 Printer is not printing	Assigned	
Refresh View Mark As Duplicate Mark As Original		

The case is added to the Current Duplicate Cases list. If no duplicate cases existed before, a new Current Duplicate Cases table is displayed.

Current Dupli	cate Case(s)		
Case ID	Summary	Status	Dup ID
HD 000000000	0065 Printer is not printing	Assigned	HD000000000064
View F	Remove Duplicate		

Click Mark Selected Case as Original to make the selected request the original of the current case.

The case is marked as the original, and added to the Current Original Case list. The request that you have open is marked as a duplicate, and the upper region of the form displays the message "This is a duplicate case."

- 9 Click the Activity tab, and update the Work Log.
- 10 If the case status in Work in Progress, update the time spent on the case.
- 11 Click Save.
- ► To remove duplication status from a case:
- 1 Search for requests, as described in "To search for a help desk case:" on page 98.

The requests matching the search criteria are displayed in the Results pane.

**2** Select the request from which you want to remove the duplicate status, and click View.



The request appears in the Modify Help Desk Case form. The note in the upper region of the form identifies it as a duplicate case.

Requester Information Activity Duplicates Solutions Related Items Problem Management	ent
Current Original Case	
Case ID Summary HD000000000155! Printer is not printing	Status Dup ID Assigned
View Remove Duplicate	

- **3** Click the Duplicates tab.
- 4 Click the Current Original Case list to refresh it.

The Current Original Case list displays the case that is marked as the original of your open case.

Requester Information Activity Duplicates Solutions Related Items Problem Management	
Current Original Case	
Case ID Summary Status HD00000000156 Printer is not printing Assigned	Dup ID
View Remove Duplicate	

- 5 To review the original case to verify that the two cases are not duplicates, click View.
- **6** The Help Desk Case form is displayed.
- 7 Review the case.
- 8 Click Close.
- 9 If the two cases are not duplicates, click Remove Duplicate.

A message reports that your current case will be removed as a duplicate.

- **10** Click OK to dismiss the message.
- 11 Click Save.

You can now continue working on the case.



# Working with help desk case solutions

As you create a new case or review an existing case, you will want to determine whether a solution already exists for the problem.

Solutions are made available when the Category, Type, and Item fields of a help desk case match the Category, Type, and Item fields of an existing solution.

## Searching for a solution

The procedures for searching for possible solutions differ, depending on which form you use when creating a request.

- To search for possible solutions when creating a new case in the Generic New Request form:
- 1 On the Remedy IT Service Management Console, click New Request.

The generic New Request form is displayed.

2 In the Summary field, select a predefined summary.

If a solution is available based on what you enter in the Summary field, the Solution Available! button is enabled.

	IT Service Management	1	
New Request			
Summary*	<b>•</b>	Category	•
Description*		Туре	<b>•</b>
Status		Item	•
WorkLog	Ω		
Requester Information			
Login*+	Profile	Region	<b>•</b>
VIP		Site	<b>•</b>
Phone		Department	•
Urgency 💌		Office	
Requester's Assets	Requester's O		
Asset ID Name Status	Request ID	Summary Status	Assigned Applicatic Escalated
Click to Refresh		Click to Fi	lehesh
View Refresh	View Rel	fresh	
Save Solution Available! Reports Bulletin	n Board Reminders Close		Help

3 Click Solution Available!



A list of possible solutions is displayed in the Available Solutions dialog box.

鼦Remedy <sup>.</sup>		
Available Solutions		
Summary Check the domain being entered when logging in	Type †Connectivity	ltem İDial-up
View Use Solution Close		

**4** To view more information about a listed solution, select the solution, and click View.

The Solution Details form is displayed.

鼦Reme	edy <sup>.</sup>					
Solution Solution D Summary Description	etails Check the domain being en			History Lo	99	 
Status Count Case Des	Current 1 cription	Submitted By <i>Created</i>	Sam Secondlevel	Nodified		
Category Type Close	Networking  Connectivity	Summary Description	Cannot connect remote Error occurs about perm	,	to dial in.	
						Help

If the solution appears to meet your needs, you can use the solution to resolve the case, as outlined in step 6.

- **5** Click Close to return to the solutions list in the Available Solutions dialog box.
- **6** If you decide to use a solution:
  - **a** Select the solution and click Use Solution.

A message reports that using this solution will resolve the request.

**b** Click OK.

A dialog box reports that the requester has been notified of the case's resolution, and that you have been notified of the case.



If you decide not to use a solution, click Close in the Available Solutions dialog box.

- ▶ To search for possible solutions when working in the Help Desk Case form:
- 1 Create a new help desk case as described in "To create a new help desk case in a Help Desk Case form:" on page 87, or search for and open an existing case as described in "To search for a help desk case:" on page 98.
- **2** Make sure that you have entered valid values in the Category, Type, and Item fields of the Help Desk Case form.
- **3** Click the Solutions tab.
- 4 Click List Possible Solutions.

The Solution dialog box is displayed, with a list of possible solutions if any are available.

鼦Remedy <sup>.</sup>	
Search Criteria	
Category 🗸	Keyword
Туре	
Item	
Item	
Search Clear Fields	
Search Results	
Summary Solution ID	Number of times Solution Used Category Type Item
User needs to get the company corporate secul 000001	Networking Connectivity External
Go to the server for the corporate database an 000002	1 Software Database Other
Email Software version 5.1 is compatible with 0 000003	1 Software Email Other
Direct requester to the Employee Benefits Web 000004	1 Human Reso Benefits General
Check calculations on imported charts. 000005	Software Microsoft Offi MS Word
If you get printer error "Printer Offline A2", reset 000006	Printing Printer Failure No Printout A
CPU needs to be replaced. 000007	Hardware Server File Server
Too many applications are running at once. 000008	Software Microsoft Offi MS Word
Reinstall the printer driver. 000009	Printing Printer Failure DLL File Not
Open the panel doors and remove obstructed p 000010	3 Printing Printer Failure Jammed Pape
View Use Solution	
Close	Help

- **Note:** The solutions listed might not necessarily be the appropriate solutions for your case. Always review a solution to make sure that it is suitable for the case.
- 5 Select a solution, and click View.

The Solution form displays the details of the solution.

Review the solution.

- 6 Click Close.
- 7 To use the solution, select it, and click Use Solution.

The dialog box closes, and the Summary and Details fields are filled in.



If none of the solutions are suitable, you can search for solutions by changing the Category, Type and Item fields, or clearing the fields and searching by Keyword. If you find a solution that has different Category, Type, and Item fields than your case, you must change the Category, Type, and Item fields for the case.

- 8 If you have selected a solution, you can resolve the case:
  - a Update the Work Log field in the Activity tab.
  - **b** In the Status field, select Resolved.
  - c Click Save.

A message reports that the requester has been notified of the case's resolution.

**9** Click OK to dismiss the message.

## **Creating new solutions**

When you resolve a help desk case that is likely to happen to other requesters, you can make your solution available by creating an entry in the solutions database. If this situation arises again, the information will be available, and resolution time will be much shorter.

When you create a solution, your manager is notified of your proposed solution. Your manager must approve your solution before it becomes available for general use in your organization.

#### ► To create a solution:

- 1 Open a help desk case that has been resolved.
- **2** Click the Solutions tab.
- 3 In the Summary field, enter a summary of the solution.
- 4 In the Details field, enter more information about the solution.

Requester Information	Activity Duplicates Solutions Related Items Problem Management
Current Case So	lution
Summary	Check position of paper guides.
Details	Check position of paper guides to be sure they are correct for the size of paper being used.
Root Cause	
Resolution Method	
	Propose Solution List Possible Solutions



- 5 Click Propose Solution.
- **6** In response to the prompt, select Yes to send the proposed solution to your manager, or No to cancel it.

The New Solution form is displayed.

7 Click Save.

The solution is saved with a status of Proposed, and your manager is notified.

# Working with related items

Help desk cases can affect, and can be affected by, change requests and assets. Remedy Help Desk enables you to create relationships between help desk cases and change requests or asset records.

For example, several help desk cases have been submitted about insufficient memory, and a change request has already been created to upgrade everyone's memory. The help desk cases can be related to the change request. The asset could also be related to the change request for the memory.

When working with a help desk case, you can relate it to other cases, to change requests, or to asset records:

- Relating help desk cases to other help desk cases—When you work with a help desk case, you might need to create related cases that address similar issues. A set of related cases can result from many issues reported to the help desk by one requester at one time. A set of related cases can also result from a single problem that encompasses several issues, which span multiple, second-level support technicians.
- Relating help desk cases to change requests—When you work with a help desk case, you might need to work with a related change request. For example, if a change request for a server upgrade results in connection problems for the people affected by the change, you can relate their help desk cases to the server upgrade change request as you open the cases.
- Relating help desk cases to assets—When you work with a help desk case, you might need to work with a related asset record. For example, if you are working on a help desk case involving a monitor, you might need to assign another monitor temporarily. You might want to relate the help desk case to the monitor to supplement the asset's service record.



#### ► To view requests related to a help desk case:

1 Select the help desk case in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The case is displayed.

- 2 Click the Related Items tab.
- **3** From the Show menu, choose the related requests that you want to view:
  - All Related Items shows all related asset records, change requests, and help desk cases.
  - Related Assets shows only the related asset records.
  - Related Change Requests shows only the related change requests.
  - Related Help Desk Cases shows only the related help desk cases.

All specified requests are displayed in the Related Items table.

Requester Information Activity Solutions Related Items Problem Mar	agement
Current Relationships	
Show All Related Items   No records related	ted to this case were found.
Related Items	
Refresh View Remove Relationship	
Create New Related Record	Search for Existing Record to Relate
Record Type Create	Record Type Search

If no related items exist for the request, the tab displays the message "No records related to this case were found."

- 4 To view a related request, select it, and click View.
- 5 The request is displayed.

#### • To remove a related request from a help desk case:

1 Select the case in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The case is displayed.

- 2 Click the Related Items tab.
- **3** From the Show menu, select one of the display options.

All of the specified requests are displayed in the Related Items table.

If no related items exist for the request, the tab displays the message "No records related to this case were found."



- 4 To remove a relationship, select an item, and click Remove Relationship. A message asks you to confirm that you want to remove the relationship.
- 5 Click Yes.
- 6 Click Save to save the changes to the case.
- To relate a new request to a help desk case:
- 1 Select the help desk case in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The case is displayed.

- 2 Click the Related Items tab.
- **3** In the Create New Related Record region, select the appropriate request type from the Record Type field.
- 4 Click Create.

A form for that request is displayed.

- 5 Create a new request:
  - For information about creating a new help desk case, see "Creating a new help desk case" on page 86.
  - For information about creating a new asset record, see "Creating asset records" on page 160.
  - For information about creating a new change request, see "Creating a new change request" on page 123.
- 6 When you have finished creating the new request, click Save.

A message reports that you have created a new request. Another message tells you that the two requests have been related.

7 Click OK to close each dialog box.

The form for the new request closes.

- 8 If the newly related item does not appear in the Related Items table, refresh the table manually by clicking the Refresh button.
- 9 Click Save.
- To relate existing requests to a help desk case:
- In the Remedy Support console, select a request, and click View. The request is displayed.
- **2** Click the Related Items tab.

- **3** In the Search for Existing Record to Relate region, select a request type from the Record Type field.
- 4 Click Search.

The Search and Relate dialog box is displayed, listing the requests according to the value in the Search with the Same field.

Remedy <sup>.</sup>				
Search Criteria				
Search for*	Desk Cases	•		
Predefined Advanced				
Search with the Same* Rec	quester	•		
Search				
Search Results				
Search Results Case ID	Case Status		ihort Description	
Search Results Case ID HD00000000013	Closed		Fror using report writer	-
Search Results Case ID H0000000000013 HD000000000025	Closed Closed		rror using report writer Need ergonomic assessment	
Search Results Case ID H0000000000013 HD000000000025 HD000000000025	Closed Closed Closed	N	rror using report writer Need ergonomic assessment Need help mapping network drive	
Search Results Case ID H00000000000013 H0000000000025 H0000000000025 H0000000000	Closed Closed Closed Closed		rror using report writer Veed ergonomic assessment Veed help mapping network drive Vot enough memory to print	<b>_</b>
Search Results Case ID H000000000018 H0100000000025 H0100000000025 H01000000000026 H01000000000030	Closed Closed Closed Closed Closed	B N N F	rror using report writer Veed ergonomic assessment Veed help mapping network drive Not enough memory to print Permission error when trying to open netw	<u> </u>
Search Results Case ID Hobo00000000013 Hob00000000025 Hob000000000029 Hob000000000029 Hob00000000003	Closed Closed Closed Closed Closed Closed	F F F	tror using report writer leed ergonomic assessment leed help mapping network drive lot enough memory to print Permission error when trying to open netw fror when launching a spreadsheet	
Search Results Case ID H000000000018 H0100000000025 H0100000000025 H01000000000026 H01000000000030	Closed Closed Closed Closed Closed	F F F F	rror using report writer Veed ergonomic assessment Veed help mapping network drive Not enough memory to print Permission error when trying to open netw	
Search Results Case ID HD000000000018 HD000000000025 HD000000000025 HD000000000030 HD00000000033 HD00000000035 HD00000000035 HD00000000035	Closed Closed Closed Closed Closed Closed Closed	F F F F	tror using report writer leed ergonomic assessment Need help mapping network drive lot enough memory to print Permission error when trying to open netw Error when launching a spreadsheet Trinter is jammed	
Search Results Case ID HD000000000016 HD000000000025 HD000000000025 HD000000000023 HD000000000030 HD000000000035	Closed Closed Closed Closed Closed Closed Closed	F F F F	tror using report writer leed ergonomic assessment Need help mapping network drive lot enough memory to print Permission error when trying to open netw Error when launching a spreadsheet Trinter is jammed	
Search Results Case ID HD000000000018 HD000000000025 HD000000000025 HD000000000030 HD00000000033 HD00000000035 HD00000000035 HD00000000035	Closed Closed Closed Closed Closed Closed Closed	F F F F	tror using report writer leed ergonomic assessment Need help mapping network drive lot enough memory to print Permission error when trying to open netw Error when launching a spreadsheet Trinter is jammed	•

- 5 To change the search, select another value in the Search with the Same field, or click the Advanced tab to enter additional search criteria.
- 6 Click Search.

The Search Results list shows the requests matching the search criteria.

- 7 To view more information about a request, select it, and click View.The request's form is displayed, showing the details of the request.
- 8 Click Close.
- **9** To relate a request, select it, and click Relate.

A message reports that the request has been related.

10 Click Save to save the case to which you were relating the other request.

# **Resolving help desk cases**

When you finish working on a case, you must change its status to Resolved. The requester is notified when a case is resolved. The requester can review the case and confirm resolution by closing the case, or reopen it if the resolution is not satisfactory.



If the requester does not close or reopen the case, the Help Desk module automatically changes the status to Closed (after a predefined period of time), and sets the Closure Code to Automatically Closed.

The response time to change the status depends on how the Remedy Help Desk administrator configured the application module.

#### ► To resolve a help desk case:

1 Search for the case that you want to resolve, and open it, as described in "To search for a help desk case:" on page 98.

The case is displayed.

- 2 If you want to track the time you spend as you are resolving the case, click the Activity tab, and click the Start Clock button.
- 3 When you have resolved the case, select Resolved in the Status field.
- 4 Click the Activity tab if it is not already displayed, and enter a description of how you resolved the case in the Work Log field.
- 5 In the Time Spent Resolving Case field, do either of the following:
  - If you used the clock, click the Stop Clock button. A message reports the total time spent. The total time spent is also entered in the read-only Total Time Spent field.
  - Enter a number of minutes manually in the editable Total Time Spent field.
- 6 Click Save.

If one or assets are related to the case you are resolving, a message is displayed, asking if any assets have changed as a result of the resolution of this case.

- If no assets are affected, click No.
- If a related asset record for this case needs to be updated, click Yes. Select the asset that needs to be updated, and make the necessary changes. For more information about updating asset records, see "Working with the Asset Inventory Module as Support" on page 159.

# **Closing help desk cases**

Usually, when you resolve a case, the requester is notified that the case is resolved. The requester can then close the case. However, there might be occasions when you are asked to close the case. You can do so if you are the Assigned Individual for the case.

**Note:** If a help desk case has a Case Type of Problem, you must be a member of the Problem Management group to close the case.

#### ► To close a help desk case:

- 1 Display the case you want to close.
- 2 Click the Activity tab.
- 3 In the Work Log field, enter any relevant information about closing the case.
- 4 In the Status field, select Closed.
- 5 In the Closure Code field, choose the appropriate closure code.

For example, if the case was resolved with no obstacles, choose Successful. If the case was resolved temporarily with a workaround, choose Successful with Problems. Note any such problems in the work log.

6 Click Save.

The case will be listed in the Requester's Cases with a status of Closed, and the requester will be prompted to complete a survey.



# Working with Problem Management

The Problem Management tab enables you to implement incident and problem control.

# **Overview of problem management**

When a requester reports a problem, the Remedy Help Desk support staff try to resolve the case as quickly as possible so that the requester can resume work. However, the support staff might be too busy responding to help desk cases to investigate their underlying causes in greater detail. For example, when a user reports that an application is not responding, the user might be advised to restart the application. While this enables the user to resume working, the underlying reason for the application becoming nonresponsive is not discovered. To stabilize the environment, errors must be discovered and removed.

Problem management enhances the Help Desk process by focusing on discovering and resolving underlying problems, and improving the IT infrastructure to enhance service and reduce the number of help desk cases. The purpose of problem management is not to solve help desk cases quickly, but to implement a reliable, long-term solution.

Problem management provides support staff with information about possible solutions, the status of problems, and recognized faults.

Implementing the problem management process requires greater effort from the organization initially, but in time the stronger infrastructure will reduce the number of incidents.

# Understanding incidents, problems, and known errors

To understand and work with problem management successfully, you must understand the distinctions between incidents, problems, and known errors, and understand the problem management process.

• Incidents are faults or disruptions in the use or implementation of IT services and are usually reported by users. For example, a user suddenly cannot access the network, and calls the help desk.



Disruptions can also occur without the user being aware of them. For example, although deficiencies in data processing or faults in data communication facilities might not be noticeable to users, they indicate faults in the organization's IT infrastructure.

- Problems are more serious issues that interfere with the effective functioning of the organization. A problem is frequently manifested in a number of related incidents and can typically be traced to an underlying cause. Problem control focuses on establishing the cause of the problem and eliminating it, thereby resolving the problem and preventing additional incidents. Incidents that cannot be solved by the Help Desk support staff should be designated as problems in the Problem Management tab, by changing the type in the Case Type field to Problem.
- Known Errors are problems that have had their root cause identified. After the root cause of the problem is identified and verified, it can be reclassified as a Known Error by selecting Yes in the Known Error field.

Errors can become known while analyzing the problem, as well as from the information about known errors provided by suppliers. For example, software is frequently shipped with release notes that detail the known bugs in the application.

# The problem management lifecycle

The following process illustrates the general lifecycle of problem management:

- 1 One or more help desk cases are created. By default, they are given a case type of Incident.
- 2 The underlying problem of the incidents is defined, and its root cause is identified. If a specific case most clearly identifies the underlying problem, its Case Type is changed from Incident to Problem. Other cases can now be related to this problem.
- 3 In the Problem Management tab, the problem manager (or any other member of the Problem Management group) marks the problem as Root Cause Identified (RFC) by selecting RC Identified from the Known Error Status menu.
- 4 Other staff members verify the root cause. The problem manager (or any other member of the Problem Management group) marks the problem as Root Cause Verified (RCV) by selecting RC Verified from the Known Error Status menu.



- **5** Once the cause of the problem is verified, the problem is reclassified as a Known Error by specifying Yes in the Known Error field. You must be a member of the Problem Management group to update this field.
- 6 A Known Error can be resolved through a change request. Using Problem Management, a Request for Change (RFC). In the Problem Management tab, RFC Created is selected in the Known Error Status field. You must be a member of the Problem Management group to update this field.
- 7 The change request is implemented. In the Problem Management tab, the Known Error field is set to No, and the Known Status is changed to RFC Completed. If the change request is denied, the problem is marked Request for Change Denied (RCD) by selecting RFC Denied in the Known Error Status field.
- 8 When a case marked as a problem is resolved, all of those assigned to any cases with related incidents are notified.

#### Designating a help desk case as a problem

When a new help desk case is created, it is designated as an incident by default. If a case cannot be resolved, or appears to have underlying causes that need to be investigated, you can change the case type and designate the case as a problem.

As you work through the case to identify possible causes of the stated problem, you might find other cases that have some similarities to the case you are working on. You can then specify those cases as related incidents.

The following procedures provide instructions for designating a case as a problem, relating incidents to a problem, and unrelating incidents.

- To designate a help desk case as a problem:
- 1 Open the help desk case you want to designate as a problem.
- 2 In the Case Type field, select Problem.

鼦Reme	edy: i	Remedy	Help Des	k				
Help Des	sk Case							
Summary*	Cannot access network	drive		•		Case Type* Pro	oblem	•
Description	I need assistance acces	ssing a networ	rk drive.			Status* 🛛 🕅	ork In Progress	•
Category*	Networking	•	Case ID+	HD0000000000000000		Pending		•
Type*	Access to Files/Drives	•	Service		-	Closure Code		•
ltem*	Permissions	•	Group+	Support-Networking	-	Escalated? Ye	is	•
Auto-ReAssign	n		Individual+		•	Priority* Lo	W	•



You can now select other cases as related incidents to this problem.

#### Relating incidents to a problem

When you are investigating a case designated as a problem, you might want to look for other cases that are similar, and designate them as related incidents. For example, several cases might have been filed by users who cannot access the network remotely. Each case might be slightly different, but they all relate to the same issue—remote access. By designating one case as a problem, and relating the other cases to it, you have convenient access to all of the related cases from the Problem Management tab. You can view each related case to get information that will help you identify the root cause of the problem and reduce its occurrence in the future.

#### • To relate incidents to a problem:

- 1 Display the help desk case to which you want to relate incidents.
- 2 Change the case type to Problem if necessary.
- **3** Click the Problem Management tab.

If any other cases have the same category, type, and incident, they are listed in the Potential Incidents table. You can also search for cases with other categories, types, or items by making selections from the Category, Type, and Item lists. The cases matching your selections will be listed in the Potential Incidents table.





4 Select the case you want related to the current problem, and click Mark as Incident.

The selected case is displayed in the Current Incidents table. The Incident Count field is updated automatically to reflect the total number of related incidents.

equester Information 🛛 A				-		
Potential Incide	nts No d	other cases m	atching Catego	ory, Type, and	l Item of this	case were found.
Category Network	ing 🗸 🔻	Туре	Access to Files/E	rives 🔻	Item Perm	hissions
Case ID	Summary				Status	Incident ID
Refresh						
Current Incident( Case ID	s) Summary				Status	Incident ID
HD000000000069	Cannot access netwo	ork drive			Assigned	HD 0000000000

5 Click Save.

#### **Unrelating incidents**

If a related incident appears not to be relevant to a problem, you can unrelate it.

#### • To unrelate an incident to a problem:

- 1 Display the help desk case that has the incident you want to unrelate.
- 2 Click the Problem Management tab.
- **3** In the Current Incidents table, select the incident you want to unrelate, and click Remove Case.

The case is removed from the list and redisplayed in the Potential Incidents table. The Incident Count field is updated automatically to reflect the total number of related incidents.

#### Resolving or closing a case with related incidents

When a case marked as a problem is resolved, its related incidents are not automatically resolved; however, those who are assigned to the related incidents are notified that the case is resolved.

To close a case marked as a problem, you must be a member of the Problem Management group.

# **5** Working with the Change Tasking Module as Support

The Change Tasking module of the Remedy Help Desk Support application enables innovative IT support organizations to take preventive measures and stay ahead of technology as computing needs change.

This section explains the processes of managing change requests by using the Remedy IT Service Management Console of the Remedy Help Desk application. The following topics are covered:

- "Working with change requests in the Change Tasking module" on page 120
- "Creating new requests" on page 121
- "Working with change tasking as a change supervisor" on page 132
- "Working with Change Tasking as a task implementor" on page 155



# Working with change requests in the Change Tasking module

The Change Tasking module enables support staff to log and track change requests and the associated change tasks. After a request is created—either by a requester or a first-level support staff member—the request is automatically assigned to the appropriate group or individual, based on your support staff groupings. Staff members are notified of requests assigned to them by email, by paging, or through AR System Alert.

Your responsibilities depend on whether you are a change supervisor or a task implementor:

- Change supervisor—Responsible for creating and assigning tasks, and resolving change requests.
- Task implementor—Responsible for completing assigned tasks.

When the change request or task is assigned, support staff members can log their progress as they complete tasks associated with the request. When a support staff member changes a request state to resolved, the system notifies the requester that the request is resolved.

# The life cycle of a change request

The normal cycle of a change request consists of these stages:

- A new change request is created. This can occur in several ways. The requester can enter the change request directly into Remedy Help Desk Requester, or the requester can contact the frontline support staff by email or telephone. The frontline support staff then enters the request into the Remedy Help Desk Support application.
- The change request is assigned to the appropriate group or individual. When change requests are assigned to them, backline support staff members are notified by email or by AR System Alert. If the change request must be divided into several tasks, the change supervisor can create these tasks and assign them to the appropriate task implementors.
- Backline support staff members work on the case, logging their progress as they implement the change request or the tasks it comprises.
- When all the task implementors have finished their tasks, and have marked them as Closed, the change request can be resolved.



- The system notifies the requester that the change request has been resolved.
- Once the requester is notified of the change of status, they can close the change request by setting the Confirm Resolution to Closed. If the requester does not close the change request, the request closes automatically after a specified time.

# **Creating new requests**

When you create a new request, you can create a generic request or a change request, depending on the form you use:

- **Request** is a generic form. It is useful for frontline support in situations where the support technician is handling multiple calls simultaneously. This form allows support staff to enter request data quickly, save the request, and move on to the next call. Definitions set by your administrator in the Remedy Configuration Manager determine whether a change request or a help desk case is created and to whom the request is assigned.
- Change Request is a form in which you can create only change requests.

The form that is displayed when you begin creating a new request depends on the personal preferences you have set. For information about setting preferences, see "Setting personal preferences and options" on page 66.

# Creating a generic new request—Help Desk or Change Tasking

To have the generic New Request form appear, you may need to set your personal preferences and select Open Front Line Support Dialog option in the New Request Action field. See "Setting New Request and Search for Request Action preferences" on page 68 for more information. The following procedure assumes that you selected the Open Front Line Support Dialog option as the New Request Action preference.



- To create a new request in the New Request form:
- On the Remedy IT Service Management Console, click New Request. The generic New Request form is displayed.

龆Ren	nedy <sup>.</sup>	Remedy IT	Service Ma	inagement	t i	
New Re	equest					
Summary*				<b>•</b>	. Category	<b>•</b>
Descriptio	on*				Туре	•
Status		•			Item	•
WorkLog				1		
Requeste	r Information					
Login*+		P	rofile		Region	•
VIP		•			Site	•
Phone					Department	•
Urgency		•			Office	
	r's Assets				Open Requests	
Asset ID	Name	Status		Request ID	Summary Status	Assigned Applicatio Escalated
	Click to A	ainash			Click to ,	Hahash
View				View		
Save	Solution Available!	Reports Bulletin Bo	ard Reminders	Close		Help

2 In the Summary field, select a predefined summary from the menu, or enter a brief summary of the request.

If you select a predefined summary, the Description, Category, Type, and Item fields are filled in automatically.

3 In the Description field, enter a description of the request.

If you selected a predefined summary, a brief description is automatically entered into this field. You can add to or replace this text.

- **4** If you did not select a predefined summary, make the appropriate selections from the Category, Type, and Item fields:
  - In the Category field, select the appropriate category for the request.
  - In the Type field, select the appropriate type within the selected category.
  - In the Item field, select the appropriate item within the selected type.

When you save the request, the Change ID field will be filled in automatically with the ID number of the request.

5 In the Login+ field, type the requester's name and press Enter.



If the requester already has been entered in the People database, the Phone, Office, VIP Status, Region, Site, and Department fields are filled in automatically.

If these fields were not filled in automatically, or if you want to change them, enter appropriate information. If you change them, you will be asked whether you want to update the requester's user profile.

If the requester has not yet been entered in the database, the Search People dialog box is displayed. You can use it to search the database for records. For more information, see "Searching for a requester" on page 127.

If you cannot find the person, you can create a record for them in the database. For more information, see "Creating a requester record" on page 129.

- 6 In the Urgency field, select the urgency level of the request.
- 7 If the requester has other open requests, or has assets assigned, they will be listed in the Requester's Assets and Requester's Open Requests tables. To view one of these entries, select it, and click Details.
- 8 Click Save to create the request and submit it to the database.

## Creating a new change request

Remedy Help Desk enables any user to enter change requests into the system. A member of the support staff is assigned as the change supervisor for the change request. The change supervisor ensures that the tasks comprising the change are completed. When the support staff marks the change request as resolved, the requester is automatically notified that the change is complete.

To have the New Change Request form appear when you start creating a new request, you might need to set your personal preferences to Open Change Tasking Module in the New Request Action field. See "Setting New Request and Search for Request Action preferences" on page 68 for more information. The following procedure assumes that you selected the Open Change Tasking Module option as the New Request Action preference.



• To create a new change request in the Change Request form:

 Click New Request on the Remedy IT Service Management Console. The Change Request Information form is displayed.

鼦Remedy	- Reme	edy IT S	Service	Management				
Change Red	quest Informatio	n						
Summary* Description				<b>•</b>		<b>Status*</b> Closure Code	New	<b>•</b>
Category*		🔻 Che	ange ID+	CHG		Pending		•
Туре*		✓ Serv	/ice		•	Escalated?	No	•
ltem*		▼ Pric	ority*	Low		Approval Status		•
Auto-ReAssign 📕	1	Urge	ency	Low				
General Assessm	ent Tasks Activity Re	elated Items	5					
Requester Info	mation		Location			Support Inform	ation	
Login*+			Scope*	Global 💌		Group+		-
Name*+		Profile	Region		-	Supervisor+		-
VIP	No		Site		-			
Phone			Department		-			
Requested Date+			Office					
Submitted by	Demo							
Save Print Ch	ange Request Reports	Bulletin	Board	eminders Close				Help

2 In the Summary field, select a predefined summary from the menu, or type in a description of the change.

If you choose a predefined summary, the Category, Type, and Item fields are filled in automatically.

- 3 In the Description field, enter a detailed description of the change request.
- **4** If you did not select a predefined summary, fill in the Category, Type, and Item fields:
  - **a** In the Category field, select the appropriate category for the change. The menu items you can choose are determined by your administrator. The category field is the broadest categorization of the change request. For example, categories could include Hardware, Software, or Network.
  - **b** In the Type field, select the appropriate type for the change. The menu items you can choose are determined by your administrator *and* the value you selected for the Category field. The Type field identifies the request with more precision. For example, types could include Printers, Servers, or Workstations.



c In the Item field, select the appropriate item for the change. The menu items you can choose are determined by your administrator *and* the values you selected for the Category *and* Type fields. The Item field is the most detailed of the categorization fields. For example, items could include product type, model number, or component names.

The options listed in the Item menu depend on the value entered in the Type field.

When you save the change request, the Change ID field will be filled in automatically with the ID number of the change request.

5 In the Service field, select a type of service for this change request.

The selections available depend on how your administrator has configured this menu for the service types pertinent to your organization. For example, the menu might be configured to show specific types of warranties.

- **6** Select the Priority to identify the importance of this change request, from the standpoint of the support person.
- 7 Select the Urgency to indicate the importance that the requester assigns to this change request.
- 8 In the Status field, accept the default status of New.

You select a Closure Code when the change request is complete, or the application will close the request automatically after a specified time following resolution of the request. Your administrator specifies this automatic closure time.

The Pending field will be filled in whenever the resolution of the request is dependent upon an external action.

- **9** The Approval Status field will be filled in by the change approver once work has begun on the change request. For now, you can leave this field blank.
  - **Note:** The Auto-Reassign checkbox can be used later, if the request needs to be modified. You can check this box if you want the system to reassign the request automatically to another person when the Category, Type, or Item is changed. Assignments are determined by the categorization and location of the change request.
- 10 Click the General tab if it is not already visible.



- 11 In the Requester Information region, enter the following information:
  - Login —Enter the requester's AR System login name.
  - Name—Enter the requester's full name (for example, John Doe). If you press Enter, all other requester fields are automatically filled in with the requester's information.

If the requester's information is not found in the database, or more than one matching requester record is found, you are prompted to either select an existing requester record or create a new one. See "To create a requester record:" on page 129 for instructions about creating a new record.

If you know that the requester is already in the database, you can search for the requester's record. For information about searching for a requester, see "Searching for a requester" on page 127.

- VIP—This field is filled in automatically with Yes or No, according to whether the requester has been defined as VIP in the person's record.
- Phone—Enter the requester's phone number.
- **Request Date**—Enter the date by which the requester requires the change request to be completed.
- Submitted By—If the name of the person who is submitting the request is different from the requester, enter that person's name. By default, the Requester (the user who requires the change and is identified in the Login Name field) has the permissions status to modify the request.
- 12 Identify the scope of the change request.
  - If you select Local, you can specify the Region, Site, Department, and Office.
  - If you select Global, the change is assumed to be necessary for the entire organization. The Region, Site, Department, and Office fields are disabled.

Usually, the Group and Supervisor fields in the Support Information region will be filled in automatically when you save the change request, according to the application administrator's definitions. However, you can enter information in them.

The Modified By, Modified, and Created fields are filled in by the system and cannot be changed.

- **13** In the Requested Date field, enter the date by which the requester needs to have the change implemented.
- 14 Click the Assessment tab, and enter the dates by which you want the change request started and completed.



15 Click Save to submit the change request to the database.

When you save the change request, a message is displayed indicating to which group or individual the change request has been assigned. This assignment is determined by the categorization of the change request.

16 Click OK.

If the application is configured to "open modify mode upon create," the change request is displayed in Modify mode. The change request ID is displayed at the top of the form and in the Change ID field. The assigned group or individual is shown in the Support Information region. If necessary, you can now make further changes to the change request using the other tabs, such as entering planning information.

## Searching for a requester

If you are not sure if a requester already has an existing record in the People database, you can perform a search. You can view the requester's record and, if necessary, modify it. You can perform the following procedure from any form that has a Login Name or Name field.

- To search for a requester:
- 1 Open a form that includes the Login or Name field.
- 2 Click in the Login or the Name field.
- 3 Without moving the cursor from the field, press Enter.

The Search People dialog box is displayed, listing any matching records.

詔Remedy <sup>.</sup>					
Search Cri	teria				
Last Name		De	partment		
Full Name		Lo	gin Name		
	Search	Clear Fields			
Search Re	sults				
Last Name	First Name	Region	Site	Department	•
VP	Victor	USA	1505 Salado, Mo		
User Telecom	Joe Tim	USA USA	1505 Salado, Mo	Finance Information Servic	
Secondlevel	Sam	USA		Information Servic	
Sales	Sarah	United Kingdom			
MIS	Mike	USA		Information Servic	
Marketing	Mark	USA	25 Bay St, Moun		
HR	Holly	USA	1505 Salado, Mo	Human Resources	
Frontline	Francie	USA		Information Servic	
Fac	Felix	USA	25 Bay St, Moun		
Engineer	Erica	USA	25 Bay St, Moun		
Demo Change	Carol	USA	1505 Salado, Mo	Information Servic	-
View		·			_
OK Ca	ncel				



- 4 Enter search criteria in the appropriate fields.
- **5** Click Search.

The Search Results table shows the matching records. (You might need to refresh the table to see the records.)

盟Remedy <sup>.</sup>		
Search Criteria		and the second se
Last Name backline	Department	
Full Name	Login Name	
Search	Clear Fields	
Search Results		
Last Name First Name Backline Bob	Region Site	Department d Lie Marketing
Backline Boo	France 10 Boulevar	o Lie į Markeling
View		
OK Cancel		Help

**6** To view a record, select it, and click View.

The Person Information form is displayed.

盟 Remec	ly.	Rem	iedy IT Si	ervice Managem	ent	$\sim$	
Person Ir	nformat	tion					
Login*	Bob Ba	skline	Last Name*	Backline	]	Support Staff?*	Yes
ID	3002		First Name	Bob		Туре*	Internal 💌
Status*	Active	•	Full Name*	Bob Backline		VIP	No 💌
			Training		Û	Manager?	No 💌
Contact Page	Address	Financials					1
Notification	n Method*	Alert	Region	USA	•	Office	2-A
Email Addres	s	bob	Site	1505 Salado, Mountain	•	Manager's Name+	Demo
Phone Numb	er	333-4244	Department	Information Services	•	Web Page	
Fax Number		444-4444					
Save	Close						Help



- **7** To make changes, update the appropriate fields and click Save. For information about filling in requester information, see "Creating a requester record" on page 129.
- 8 Click Close.
- **9** Click OK to close the Search People dialog box.

# Creating a requester record

The People database contains all Remedy Help Desk application user records. Information stored here is used to automatically fill in requester information fields in many forms.

While creating a new request, you might find that the requester does not yet have a record in the database. If this is the case, you must create a record for the requester. You can do this in the Person Information form. You can access this form while you are creating the request.

#### ► To create a requester record:

- 1 Perform the steps for creating a new request, as described in "Creating a generic new request—Help Desk or Change Tasking" on page 121, or "Creating a new change request" on page 123.
- 2 In the Login Name or Name field, type the name of the person requesting the change.
- 3 Click Profile.

If a record for that person already exists in the database, the Person Information form is displayed. If no record exists for this person, a message asks if you want to create a new entry.



4 Click Yes.

The Person Information form is displayed.

盟Remedy <sup>.</sup>	Remedy IT Service Management	
Person Information		
Login"   ID   Status"   Contact   Pager   Address   Financials	Last Name* First Name ▼ Full Name*	Support Staff?"  Type"  VIP  Manager?
Notification Method* Email Address Phone Number Fax Number	Region     V       Site     V       Department     V	Office Manager's Name+ Web Page
Save Close		<u>Help</u>

- 5 Fill in the following required fields.
  - Login Name—Enter the requester's login name.
  - **Status**—Set the status to Active.
  - Last Name—Enter the requester's last name.
  - Full Name—Enter the requester's first and last name.
  - Support Staff—Select Yes or No to indicate whether the requester is a support staff member.
  - Type—Select Internal if the requester is an employee of your organization, or External if the requester belongs to another organization.
  - Notification Method—Select how the requester will be notified upon case resolution. If you select Email, you must also enter the requester's Email Address.
- **6** Optionally, fill in the other fields, including fields on the Pager and Address tabs.
- 7 Click Save.

A message reports that the entry was created.

# 

# Modifying requester information

If the requester's information changes, you can update it using the Person Information form.

- ► To modify requester information:
- 1 Open the Person Information form in one of these ways:
  - Enter the requester's name in the Login or Name field on a form, and click the Profile button.
  - Search for the requester in the Search People dialog box. Select the requester's record and click View. For more information, see "Searching for a requester" on page 127.

The Person Information form is displayed, containing the requester's information.

- **2** Update the applicable fields.
- **3** Click Save.

A message informs you that the requester record has been modified.

4 Click Close.

# Working with change tasking as a change supervisor

This section explains the Support view of the Change Tasking module and the actions you can perform as a change supervisor. A change request is assigned based on the type of change and the locations affected. Your organization can customize change request assignment by using the Remedy Configuration Manager. For more information, see the Configuration section of the *Remedy IT Service Management Installation and Configuration Guide*.

Change supervisors are notified of new changes based on their notification method preferences:

 Individual Notification—If an individual is notified, that person's notification method preference from the Person Information form is used.

For example, if your notification method is AR System Alert, each change assigned to you causes a notification to appear in AR System Alert.

• Group Notification—If a group is notified, the notification method specified by each group member's preference is used to notify each member.

# **Receiving notification of change request assignments**

When a request is assigned to you, you are notified through your default notification mechanism. The notification method depends on how your system is configured.

Depending on the Notification Alert method determined by the Help Desk administrator, AR System Alert can alert you when you receive a notification. If you are configured to receive notifications, AR System Alert alerts you when a request has been sent or when progress has been made in resolving a request.

- To receive notification of change request assignment by AR System Alert:
- 1 Log into AR System Alert as a Support staff member.

When you or your group receive a notification that you or your group have been assigned to a case, the information appears in AR System Alert.

2 In the AR System Alert dialog box, click List Alerts.



- **3** From the Alert List window, select a request, and double-click it. The request is displayed.
- ▶ To receive notification of change request assignment by email:
- 1 When you receive email notifying you or your group that a change request has been assigned to you, log in to Remedy Help Desk Support.
- 2 Locate the request and open it. You can do this in one of these ways:
  - Select the request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.
  - Search for the request. For more details, see "Searching for requests" on page 136.

The request is displayed in the Change Request form. You can now modify the request.

## Accepting change request assignments

During configuration, the application administrator determines to whom change requests are assigned. This decision is based on criteria such as the change request's category, type, or item, and its location. For example, all change requests that are categorized as hardware might be assigned to the Support-Hardware group. All change requests that are categorized as software upgrades and originate from California might be assigned to Sonya Software in San Francisco. The criteria of the change request, together with the application administrator's configuration, determines to whom each change is assigned. For more information about configuration, see the *Remedy IT Service Management Installation and Configuration Guide*.

The change supervisor must make sure that the assignment is correct and accept the change request. If the assignment is not correct, the change supervisor can reassign the request to someone in the group, or send a reassignment request to the manager, asking that the change be reassigned to another supervisor outside the group.

If a request is assigned to you, your name already appears in the Supervisor field in the General tab.

If a request is assigned to your group but not to an individual, you can assign the request to yourself by selecting your name in the Supervisor menu.



- ► To accept an assigned change request:
- 1 Open the request in the Assigned Requests table of the Remedy IT Service Management Console.

The request is displayed.

- 2 Set the Status field to Planning.
  - **Note:** Do not omit this step. Different escalations can occur based on the status of the request. If the request is in an Assigned state while you are working on it, an inaccurate escalation could occur if the request needs to be escalated.

Depending on how your administrator has configured the settings, and if Remedy Asset Management is installed at your site, a message might prompt you to specify whether you want to search for and relate assets to this request.

3 Click Yes if you want to relate assets, or No if you do not.

If you clicked Yes, the Search and Relate form is displayed. For more information about relating assets, see "Working with related items" on page 108.

- 4 Select your name from the Supervisor menu or type your name in the field.
- **5** Click the Assessment tab.

General Assessment Tasks Activity Related Items								
Planned Time	Actual Time							
Duration (hrs) 0.000000 Week Month	Actual Duration (hrs)							
Start Date	Actual Start Date							
End Date	Actual End Date							
Attachments	Risk Assessment							
File Name Size Attachment	Risk							
Test Plan Backout Plan	Plans							
	Comments							

- 6 Enter planning information:
  - In the Planned Time section, do either of the following:
    - Manually enter a Start Date and an End Date, based on the information in the Requested Date field in the General tab.
    - Use the Week or Month buttons to enter a start and end date with a weeklong or monthlong range.
  - To attach a file:
  - a Right-click in the Attachments table, and click Add.

In the web, click the Add button below the attachments table.



**b** In the dialog box that is displayed, select the file to be attached, and choose Open.

In the web, use the To field to select the attachment pool to which you want the attachment added.

The file is displayed in the Attachments field.

- 7 Click the Activity tab, and enter relevant information in the Work Log field.
- 8 Click Save.

A message reports that the change request has been assigned.

# Reassigning change requests and requesting reassignment

If a request is assigned to you, your name appears in the Supervisor field in the General tab.

If you cannot accept an assigned change request, you can reassign the request to another change supervisor. You can reassign it to someone in your group by using the Supervisor menu list. To assign a change request to someone outside of your group, you must have your manager reassign the change request.

When you ask that a change request be reassigned, your manager is notified of the reassignment request. If the manager reassigns the request to another supervisor, you and the other supervisor are notified that the change request has been reassigned. Until then, you remain assigned to the request.

If the Auto-Reassign box is checked on the form, the request is automatically reassigned to the appropriate staff if the information in the Category, Type, or Item fields is changed.

#### ► To reassign a change request:

1 Select a change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

2 In the Supervisor field, select the supervisor to whom you want to assign the change request

A message reports that your manager will be notified when you save the request.



3 Click Save.

A message reports who has been notified of the reassignment.

- ▶ To request reassignment of a change request:
- 1 Select the request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

- 2 In the General tab, verify that your name is displayed in the Supervisor field.
- **3** Click the Activity tab.
- 4 In the Request Reassignment? field, select Yes.

A message reports that your manager will be notified of the reassignment request.

- 5 Click OK to dismiss the message.
- 6 Click Save.

### Searching for requests

The help desk cases and change requests that are assigned to you are automatically listed in the Remedy IT Service Management Console. You can also search for and view any requests that your administrator has given you access to, including those not assigned to you.

To have the Search Change Requests form appear, you may need to set your personal preferences and select the Open Change Tasking Module option in the Search For Request Action field. See "Setting New Request and Search for Request Action preferences" on page 68 for more information. The following procedure assumes that you selected the Open Change Tasking Module option as the default Search For Request Action preference.

#### ► To search for a request:

- 1 On the Remedy IT Service Management Console, click Search for Request. The Search Change Requests form is displayed.
- **2** Fill in the applicable fields with the criteria by which you want to define your search.
- 3 Click Search.

In Windows, the requests matching the search criteria are displayed in the Results pane. The selected request is shown in the Details pane.



In the web, the matching requests are listed in a table at the bottom of the form.

- **4** To view the details of another change request, click on the request in the list. The change request is displayed.
- ► To view your group's open change requests in Windows:
- On the Remedy IT Service Management Console, click Search for Request. The Search Change Requests form is displayed.
- 2 Choose Actions > Defined Searches > List Group's Open Changes.Your group's open change requests are displayed in the Results pane.
- **3** To view the details of a change request, click on the item in the list. The request is displayed.
- To view your group's open change requests in the web:
- 1 On the Remedy IT Service Management Console, click Search for Request. The Search Change Requests form is displayed.
- **2** Click Advanced Search.

The advanced search bar appears.

**3** Enter the following in the Advanced Search field:

'Group+'= "<your\_group\_name>" AND 'Status' < "Resolved"

- 4 Click Search.
- 5 The matching requests will be listed in the table at the bottom of the form. If you need to, scroll through the list, or click the Next link above the table to view more entries.
- 6 To view a request, click in the row for the request you want to view.
- ▶ To view your open change requests in Windows:
- 1 On the Remedy IT Service Management Console, click Search for Request. The Search Change Requests form is displayed.
- 2 Choose Actions > Defined Searches > List My Open Changes.Your open change requests are displayed in the Results pane.
- **3** To view the details of a change request, click on the item in the list. The request is displayed in the Details pane.



- ► To view your open change requests in the web:
- On the Remedy IT Service Management Console, click Search for Request. The Search Change Requests form is displayed.
- 2 Click Advanced Search.

The advanced search bar appears.

**3** Enter the following in the Advanced Search field:

'Supervisor+'= "<your\_name>" AND 'Status' < "Resolved"

- 4 Click Search.
- 5 The matching requests will be listed in the table at the bottom of the form. If you need to, scroll through the list, or click the Next link above the table to view more entries.
- **6** To view a request, click in the row for the request you want to view, and click View.

# Modifying existing change requests

As you work on resolving a change request, you will want to modify it occasionally. For example, if you are working on implementing a change request that involves updating the requester's software, you might want to keep a log of when you ordered the new software, when it arrived, and so on.

### • To modify a change request:

- 1 Locate the request that you want to modify:
  - Select the request from the list, and click View.

Or

• Search for the request, as described in "Searching for requests" on page 136.

The request is displayed.

**2** Click the Activity tab.



**3** In the Work Log field, enter any important information about the change request progress.

General Assessr	nent Tasks Activity Related Items	
Case Log		
Work Log		<b>W</b>
Audit		<u></u>
Other Activiti Request Reassi		

4 Click Save.

# Working with related items

Remedy Help Desk enables you to create relationships between change requests, help desk cases, and asset records.

The following example illustrates a situation where you would want to relate help desk cases with a change request. Several users have called in with problems about having insufficient memory to run an application. A change request for upgrading everyone's memory has already been created and is pending implementation. In this situation, the help desk cases can be related to the change request. The change request, in turn, can also be related to the asset record for the memory.

You can relate change requests to each other, to assets, or to help desk cases:

 Relating change requests to other change requests—By creating relationships between change requests, you can work with multiple change requests at the same time.

For example, the operations department submits a change request to have their email software upgraded. While supervising the change request, you notice that most of the department computers do not have enough memory to run the new email software. You open a related change request for the department to have a memory upgrade.

- Relating change requests to assets—When you work with a change request, you might need to work with a related asset record. For example, if you are working on a change request to upgrade memory for an entire department, you will need to work with the asset records for the individual department members and for the memory in inventory.
- Relating change requests to help desk cases—When you work with a change request, you might need to work with a related help desk case. For example, if a change request for a server upgrade resulted in connection problems for several requesters, you can relate the help desk cases about the connection problems to the change request for the server upgrade.
- To view requests related to a change request:
- 1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

2 Click the Related Items tab.

General Assessment Tasks Activity Related Items	
Current Relationships	
Show All Related Items	No records were found related to this change request.
Related Items	
Refresh View Remove Relationship	
Create New Related Record	Search for Existing Record to Relate
Record Type	Record Type
✓ Create	Search

- 3 From the Show menu, choose the related requests that you want to view:
  - All Related Items shows all related change requests, asset records, and help desk cases.
  - **Related Assets** shows only the related asset records.
  - Related Change Requests shows only the related change requests.
  - Related Help Desk Cases shows only the related help desk cases.

All specified requests are displayed in the Related Items table.

If no related items exist for the request, the tab displays the message: "No records were found related to this change request."

**4** To view a related request, select it, and click View. The request is displayed.



- ► To remove a related request from a change request:
- 1 Select the request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

- 2 Click the Related Items tab.
- 3 From the Show menu, select one of the display options.All of the specified requests are displayed in the Related Items table.If no related items exist for the request, a message appears above the table.
- **4** To remove a relationship, select an item, and click Remove Relationship. A message asks you to confirm that you want to remove the relationship.
- 5 Click Yes.
- 6 Click Save to save the changes to the original request.

#### • To relate a new request to an existing change request:

1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

- 2 Click the Related Items tab.
- **3** In the Create New Related Record region, select the appropriate request type from the Record Type field.
- 4 Click Create.

The form for that request type is displayed.

- 5 Create a new request:
  - For information about creating a new help desk case, see "Creating a new help desk case" on page 86.
  - For information about creating a new change request, see "Creating a new change request" on page 123.
  - For information about creating a new asset record, see "Creating asset records" on page 160.
- 6 When you have finished creating the new request, click Save.

A message reports that you have created a new request. Another message tells you that the two requests have been related.



7 Click OK to close each dialog box.

The form for the new request closes.

- 8 If the newly related item does not appear in the Related Items table, refresh the table manually by clicking the Refresh button below the table.
- 9 Click Save.
- To relate existing requests to an existing change request:
- 1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click Details.

The request is displayed.

- 2 Click the Related Items tab.
- **3** In the Search for Existing Record to Relate region, select the appropriate request type from the Record Type field.
- 4 Click Search.

The Search and Relate dialog box is displayed, listing the requests according to the value in the Search with the Same field.

웹Remedy <sup>.</sup>		
Search Criteria		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Search for* Cha	nge Requests	•
Predefined Advanced		
Search with the Same* Re	quester	V
Search		
Search Results		
Change ID CHG0000000007	Change Status Closed	Short Description install database
CHG00000000011	Closed	Install MS Project
CHG00000000013 CHG00000000020	Closed Assigned	Upgrade memory on my dev machine Upgrade Microsoft Office
View Relate	· -	
Close		

**5** In the Search with the Same field, select another value if you want to change the search.

To refine the search criteria, click the Advanced tab and enter more specific search criteria.

6 Click Search.

The Search Results list shows the requests matching the search criteria.

7 To view more information about a request, select it, and click View.



- 8 Click Close.
- **9** To relate a request, select it, and click Relate.

A message reports that the request has been related.

**10** Click Close to save the change request to which you were relating the other request.

# Planning, creating, and assigning tasks

Creating and resolving a change request can be a complex procedure that requires several steps. Remedy Help Desk Support enables you to subdivide a change request into several components, or tasks.

You can create new tasks for a change request. You can also add predefined tasks to a change request. Predefined tasks are a set of tasks that comprise a change request. For example, the predefined tasks for Upgrade Memory are "Get memory hardware asset from inventory" and "Install memory." When you create predefined tasks, the tasks are automatically related to the change request.

The Remedy Help Desk administrator predefines tasks when configuring the Change Tasking module. For information about creating predefined tasks, see the *Remedy IT Service Management Installation and Configuration Guide*.

A change request can consist of several tasks. You can open each task, assign the task to a support staff member, and change the Plans and Planned Dates as needed.

For example, to solve a requester's disk space problem, you might create a change request to upgrade the requester's disk drive. You could add these predefined tasks:

- Order drive
- Back up data
- Format new drive
- Reinstall software
- Restore data on new machine



- ► To create new tasks for a change request:
- 1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

- 2 Verify that the Status field is set to Planning.
- **3** Verify that the Start and End Date fields in the Assessment tab are filled in with the planned dates.

General Assessment Tasks Activity Related Items			
Planned Time			
Duration (hrs) 0.000000	Week Month		
Start Date			
End Date			

4 Click the Tasks tab.

General Assessment Tasks Activity Related Items
Tasks for Change Request         There are no tasks for the change request.           Summary         Implementor Name         Planned Stat Date         Planned End Date         Escalated         Request Urgency         Status         Item
View Create New Tasks Select Predefined Tasks Cancel Task

5 Click Create New Tasks.



Summary* Description Category* Type* Item* Auto-ReAssign Tasks Info	<b>•</b>	<i>Task ID+</i> Change ID*+ Urgency Priority*	CHG00000000020 Low Y Low Y		Status*  New    Pending  *    Closure Code  *    Escalated?  *    Work Order  *
Requester I Name+ Login Name+ VIP Phone	 Profile	Region Site Department	Local USA 25 Bay St, Mountain View, Engineering 11-A	• •	Support Information Group+  Implementor+ Request Reassignment

#### The Change Task Information form is displayed.

- 6 Enter the following information in the top part of the form:
  - Summary—Enter a brief description of the task.
  - Status—By default, the Status is set to New. If you are ready for an implementor to begin work on the task, set the Status field to Scheduled.
  - **Description**—Enter a detailed description of the task and what is involved in performing it.
  - Work Order—If the task is being contracted to a third party, select Yes to access the Work Order tab and enter work order information for the task. See "Tasks as work orders" on page 148.
  - **Note:** The Auto-ReAssign check box can be used when you are modifying a task, to have a task reassigned automatically to another implementor when the Category, Type, or Item are changed. This check box is enabled when you open the Task Information form in Modify mode. For more information, see "To reassign a task:" on page 157.
- 7 Optionally, enter the following information in the Task Info tab:
  - Group—Select a task implementor group.
  - Implementor—Select an implementor.
- 8 Click Save.



- 9 Click Close to close the Change Task form.The new tasks are displayed in the Tasks for Change Request list.
- To add predefined tasks to a change request:
- 1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

- 2 Verify that the Status field is set to Planning.
- **3** Verify that the Start and End Date fields in the Assessment tab are filled in with the planned dates.
- 4 Click the Tasks tab.
- 5 Click Select Predefined Tasks.

The Show Predefined Tasks For dialog box is displayed.

6 In the Show Predefined Tasks For menu, choose a task set.

The predefined tasks appear in the list.

躍Remedy <sup>.</sup>	
Show Predefined Tasks for Upgrade Memory	
Shott-Description Install memory.	
Add Selected Task Add All Tasks Close	

7 To add a single task to the change request, select the task, and click Add Selected Task. To add all tasks to the change request, click Add All Tasks.

A message reports that the tasks have been added.

8 Click Close.

The selected tasks appear in the Tasks for Change Request table.

- ► To cancel a task from a change request:
- 1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

**2** Click the Tasks tab.



- 3 Select the task you want to cancel, and click Cancel Task. The Task Work Log dialog box is displayed.
- 4 In the Work Log field, enter a reason for canceling the task.
- 5 Click OK.

The task status changes to Closed.

- To view a task associated with a change request:
- 1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

2 Click the Tasks tab.

The tasks for that change request are listed. If they do not appear, click the Refresh button to update the table. If no tasks exist for the change request, a message is displayed above the table stating that no tasks were found for the change request.

3 To view the information associated with a task, select the task, and click View.

#### ► To modify a task within a change request:

1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

- 2 Click the Tasks tab.
- **3** Select the task that you want to modify, and click View.

The task is displayed.

- 4 Change the appropriate fields.
- 5 Click Save.

A message confirms the change.

6 Click Close.



# Tasks as work orders

Change tasks can also be work orders that have been contracted to outside departments or third party organizations. You can view the work order information through an optional tab. The Remedy Help Desk application also is shipped with a web service that enables you to query or modify work order information over the Internet or a corporate intranet, using an external application.

- ► To specify a change task as a work order:
- 1 Open the change task.
- 2 In the Work Order field, select Yes.

The Work Order tab is enabled.

3 Click the Work Order tab.

Company Name	Remedy Corporation	▼ <u>Vie</u>	W.J	
Full Name	Phone	Email	Time Zone	Entry-Id
John Doe		john.doe@remedy.c		00000000000002
Bob Smith		bob.smith@remedy.	om	00000000000003
Date Info Sent		▼ Date R	esponse Expected	

4 In the Company Name field, select a company name.

The contacts for that company are listed in the table. You can add, remove, or modify contacts. For more information, see "Updating contact information for a work order" on page 150 and "Adding or removing contact information for a work order" on page 151.

- 5 If you have sent any information to this company about the work order, enter the date it was sent in the Date Info Sent field.
- **6** If you are expecting a response from the company by a specific date, enter that date in the Date Response Expected field.
- 7 Add any other relevant comments about the task, such as budget or schedule information.
- 8 In the Method field, select Web Service if the work order is being transmitted via a web service, or select Manual if the work is being transmitted manually.
- **9** In the Order Accessible field, select Yes if the work order information is available for processing now by way of a web service, or select No if it is not.



- **10** If the vendor uses confirmation codes for work orders, enter the vendor's confirmation code for the work order.
- 11 Click Save.

# Updating work order and company information

You can update information about a work order from the Work Order tab.

- ► To update work order information:
- 1 Display the change task with the work order whose information you want to change.
- 2 Click the Work Order tab.
- 3 Make the appropriate updates to the date, comments, or Methods fields.
- 4 To update company information, use the following procedure.
- 5 Click Save.

#### • To update company information for a work order:

1 In the Work Order tab, click the View button next to the Company Name field.

The Company Information form is displayed.

鼦Remedy <sup>.</sup>	Remedy IT Se	rvice Manage	ement	
Company In	formation			
Company ID*	1	Company Type*	Supplier Manufacturer	▼
Company Name*	Remedy Corporation	Category	Software	▼
Status*	Current	Vendor Code	RMDY	
Location Contac	ts Miscellaneous			
Street Address 1	1505 Salado Drive	Phone	650-903-5555	
Street Address 2		Hot Line	650-555-1000	
Street Address 3		Fax	650-254-5555	
City+	Mountain View	Email	questions@remedy.com	
State/Prov+	CA 🗨 California	Web Page	www.remedy.com	
Country+	US 🗸 United States			
Postal Code+	94043			
Save Cl	ose			



- 2 Update the company information at the top of the form as needed.
- **3** Click the Location tab, and update the company address information as needed.
- 4 Click the Miscellaneous tab, and enter any relevant information concerning the vendor's lead time for the work order, hours of operation, cost center, time zone, budget code (if any) currency used for the vendor, and any pertinent notes about the work order. This information is optional.

# Updating contact information for a work order

You can update the information about each of the contacts for the company specified in a work order.

#### ▶ To update contact information for a company:

- 1 Display the change task that has the work order whose contact information you need to update.
- 2 Click the Work Order tab.
- 3 Click the View button next to the company name.
- 4 In the Company Information form, click the Contacts tab.
- 5 Select a contact from the Company Contacts table, and click View.

The Contact Information form is displayed.

盟Remedy <sup>.</sup>	Remedy	IT Service Ma	nagement		
Contact Informa	ation			2	
Full Name*+ John (	Doel	Company Name*-	⊧ IBM	Status*	New
Login Name		Company ID*+	888	Notification Method*	Phone 💌
Classification Contact D Contact Type* Primar Company Type					
Save Close					

- **6** Update the information as needed.
  - The Classification tab specifies the type of contact, including organizational area and type of company.
  - The Contact Details tab provides phone, pager, web, and other contact options.
  - The Contact Address tab specifies the corporate address for this contact.



- 7 Click Close to close the Contact Information form.
- 8 Click Close to close the Company Information form.
- 9 Click Save to save the new the task information.
- 10 Click Close.

## Adding or removing contact information for a work order

If you have a new contact, or if a contact you are working with is no longer involved with a work order, you can add can add and remove contact names as needed.

#### ► To add a work order company contact:

- 1 Display the change task with the work order for which you want to add a contact.
- 2 Click the Work Order tab.
- **3** Select a company from the list.
- 4 Click View.

The Company Information form is displayed.

- 5 Click the Contacts tab.
- 6 Click Add.
- 7 The Contact Information form is displayed.
- 8 Enter the contact information:
  - **a** In the top part of the form, fill in the required fields:
    - In the Full Name field, enter the contact's first and last name.
    - In the Status field, select a status of the contact (for example, New if this is a new contact),
    - In the Notification Method field, select the type of notification to be used for the contact (for example, email).

The Company Name and company ID fields are filled in automatically.

- **b** In the Classification tab, fill in the fields:
  - In the Contact Type field, select the type of contact (for example, Primary or Secondary).
  - (Optional) In the Company Type field, enter any relevant information about the company.



- c In the Contact Details field, enter the applicable contact specifics, such as phone number, email address, or pager information. If you selected email as the notification method, you must enter an email address for the contact in the Email field.
- d In the Contact Address tab, enter mailing address information for the contact.
- 9 Click Save to close the Contact Information form.

The new contact appears in the Company Contacts table of the Company Information form.

- 10 Click Close to close the Company Information form.
- ► To remove a work order company contact:
- 1 Display the change task with the work order for which you want to remove a contact.
- 2 Click the Work Order tab.
- **3** From the Company Name field, select the company with the contact you want to remove.
- 4 Click View.

The Company Information form is displayed.

- **5** Click the Contacts tab.
- 6 In the Company Contacts table, select the contact you want to remove.
- 7 Click Remove.
- 8 Click Save.
- 9 Click Close to close the Company Information form.

# Assigning tasks to task implementors

As a change supervisor, you will assign tasks to task implementors who must then complete them.

When you assign the change task, the assignee is automatically notified. The change task is listed in the Assigned Requests list in the Remedy IT Service Management Console, along with any other change requests.



#### ► To assign a task to a task implementor:

1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

2 Click the Tasks tab.

The tasks associated with the change request are listed in the Tasks for Change Request table.

**3** Select the task, and click View.

The task is displayed.

- 4 In the Group field, select the appropriate group.
- **5** In the Implementor field, select the person to whom you want to assign the task.
- 6 In the Status field, select Scheduled.
- 7 Click Save.

A message reports that the assignee has been notified of the task, followed by another message that the task has been modified.

- 8 Click Close.
- 9 Click Save to save the changes in the change request.

# **Responding to task reassignment requests**

As a change supervisor, you might need to reassign tasks to implementors. When a task implementor requests reassignment, you are notified. Upon reviewing the task, you can decide to reassign the change to another task implementor, or to deny the reassignment request.

If you reassign the change task, the previous and new assignees are automatically notified of the changed assignment. If you deny the reassignment, the current assignee is informed that the assignment has not changed and the request was denied.

## • To respond to task reassignment requests:

1 Select the change request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

2 Click the Tasks tab.



The tasks associated with the change request are listed in the Tasks for Change Request table.

- **3** Select the task that you want to reassign, and click View. The task is displayed.
- 4 Approve or reject the reassignment request. To reassign the change task:
  - a Select No from the Request Reassignment field.
  - **b** Select a new staff member from the Implementor menu list.

If you decide to deny the request, select No from the Request Reassignment field.

- 5 Click Save.
- 6 Click Close.

# **Resolving change requests**

A change request is assigned a status of Resolved automatically when all of its tasks are closed. The change supervisor and the requester are notified when the change request is resolved.

The requester closes the request upon verifying that it is resolved satisfactorily. If the requester does not close the change request within the allowed response time of it being resolved, the AR System automatically closes the request. The allowed response time depends on how the Remedy Help Desk administrator has configured the Change Tasking module. The Closure Code for the change request notes that the change was automatically closed.

**Note:** A change request is automatically resolved *only* when all of its tasks are closed. Automatic resolution does not occur when any of the tasks are cancelled.

# **Closing change requests**

Usually, when you resolve a change request, the requester is notified that the request is resolved. The requester can then close the request. However, there might be occasions when you must close the request yourself. You can do so if you are the change supervisor for the request.



- ► To close a change request:
- 1 Search for the request that you want to resolve, and open it, as described in "Searching for requests" on page 136.

The request is displayed.

- 2 Click the Activity tab.
- **3** In the Work Log field, enter any relevant information about closing the request.
- 4 In the Status field, select Closed.
- **5** In the Closure Code field, choose the closure code that most accurately describes the situation for the request.

For example, if all known issues are resolved for the request, select Successful. If you are closing the request but some unresolved issues remain, select Successful with Problems. (You also may want to note those problems in the work log.)

6 Click Save.

# Working with Change Tasking as a task implementor

Task implementors are the people or groups responsible for completing change tasks related to a change request.

When a change supervisor assigns change tasks, the task implementors are notified of tasks assigned to them by email, paging, or AR System Alert. After a task is assigned, task implementors can log their progress as they complete the task. When all of the tasks related to a change request are closed, the change supervisor and requester are notified that the change request is resolved.

This section explains the Support view of the Change Tasking module and the actions you can perform as a task implementor.

# Accepting task assignments

The Remedy Help Desk application handles automatic assignment of tasks exactly as it does the automatic assignment of change requests and help desk cases. For information about receiving assignments, see "Receiving notification of change request assignments" on page 132.



#### ► To accept an assigned change task:

1 Select a change task in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The task is displayed.

龆Reme	dy. F	Remedy	/ IT Servi	ice Management			
Change	Task Informati	on					
Summary*	Backup data, install dri	ve, and res	tore data.			Status*	Closed 💌
Description	Backup data, install dri	ve, and res	tore data.			Pending	•
Category*	Hardware	-	Task ID+	TSK00000000001		Closure Code	Successful 💌
Туре*	Install	-	Change ID*	+ CHG00000000004		Escalated?	No 💌
ltem*	Hard Drive	-	Urgency	Medium 💌		Work Order	No
Auto-ReAssign			Priority*	Medium 💌			
Tasks Info As	ssessment						
Requester I	nformation		Location			Support Inf	ormation
Name+		]	Scope*	Local 💌		Group+	Support-Hardware
Login Name+		Profile	Region	USA	-	Implementor	Sam Secondlevel 📃 💌
VIP	No 💌	]	Site	25 Bay St, Mountain View,	-	Request Rea	assignment No 💌
Phone		]	Department	Marketing	-		
			Office	15-M			
Save Pri	int Task Reports	Reminde	ers Close				Help

- **2** Update the Work Log field with information about the progress you have made on the task.
- 3 In the Status field, choose WorkInProgress.
- 4 Optionally, click the Assessment tab, and enter planning information in the Plans field.
- 5 In the Implementor field, select your name.
- 6 Click Save.

# **Requesting change task reassignment**

If a task is assigned to you, your name appears in the Implementor field in the Tasks Info tab.

If you cannot accept an assigned task, you can reassign it to someone in your group, or ask your change supervisor to assign it to someone else outside of your group. When the change supervisor reassigns the task, you and the other task implementor are notified that the task has been reassigned.



#### ► To reassign a task:

1 Select the task in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The task is displayed.

- 2 In the Implementor field, select another implementor.
- 3 Click Save.

A message tells you who has been notified of the reassignment.

#### ► To request reassignment of a task:

1 Select the request in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The request is displayed.

- 2 In the Tasks Info tab, select Yes in the Request Reassignment field.
- 3 Click Save.

A message reports that your supervisor will be notified of the reassignment request.

You are notified when the change supervisor either reassigns the change task or rejects the reassignment request. Until the change supervisor takes an action to reassign the change task, you are still assigned to the task.

# Viewing and modifying tasks

The Remedy IT Service Management Console lists all requests assigned to you, including all change tasks. You can view individual requests.

- ► To view your assigned tasks:
- Select the task in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The task is displayed.

#### ► To modify a task:

1 Select the task in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The task is displayed.

2 Update the fields as appropriate.



- **3** In the Assessment tab, update the Work Log field with information about your progress.
- 4 Click Save.
- 5 Click Close.

# **Closing tasks**

When you have completed a change task, you are ready to close it. When all of the tasks that comprise a change request are closed, the change request is automatically assigned a status of Resolved. The change supervisor and the requester are notified when the change request is resolved.

# ► To close a task:

1 Select the task in the Assigned Requests table of the Remedy IT Service Management Console, and click View.

The task is displayed.

- **2** Update the fields as appropriate.
- 3 In the Assessment tab, update the Work Log field.
- 4 Set the Status to Closed.
- 5 Select a Closure Code.

For example, if the task was completed with no obstacles, choose Successful; if completion of the task required workarounds, choose Successful with Problems.

- 6 Click Save.
- 7 Click Close.

#### Chapter

# 6 Working with the Asset Inventory Module as Support

The Asset Inventory module of the Remedy Help Desk Support application provides you with a quick and convenient method of tracking your company's IT assets. Use Asset Inventory to create asset records and related component records.

Remedy Help Desk administrators customize the Asset Inventory module for the organization's use. The *Remedy IT Service Management Installation and Configuration Guide* describes these customization tasks.

The following topic areas provide information about using the Asset Inventory module to create and manage asset records and asset components.

- "Working with assets" on page 160
- "Working with asset components" on page 166
- "Working with related items" on page 172



# Working with assets

As a support staff member, you can use the Asset Inventory module to perform basic activities with asset information. This entails creating asset records and their related component records. To maintain this data, you enter information in the asset record's Asset Maintenance fields and ensure that the status for the asset is current.

You can also relate help desk cases and change requests to asset records.

# **Creating asset records**

When you receive requests for upgrades to the latest version of a product such as hardware or software, you need to create asset records to track the asset.

# • To create an asset record:

 On the Remedy IT Service Management Console, click Track Assets. The Select an Action dialog box is displayed.



2 Click New Asset.



The Asset Information form is displayed.

龆Remedy <sup>.</sup>	Remedy IT Service Management	
Asset Information		
ID"+ Name Status" Ordered	Category*     V     Region     V       Type*     V     Site     V       Item*     V     Department     V	
General Related Items		_
Asset Details Serial Number Install Date Y2K Compliant	Depreciation Cost 0.00 USD v Associations v	
Asset History		
Audit Trail	ш	
Notes	<u>m</u>	
Save Print Asset Reports	Bulletin Board Close	lelp

- **3** Fill in all required fields. Required fields are shown in boldface type:
  - ID—Type a unique alphanumeric value in the ID field.
  - Name—Enter a descriptive name for the asset.
  - Status—Select a value, or accept the default value of Ordered.
  - **Category**—Select a category. The values you can choose are determined by the administrator.
  - Type—Select a type. The values you can choose are determined by the category you chose, and by the administrator.
  - Item—Select an item. The values you can choose are determined by the type you chose, and by the administrator.
- 4 Select values from the Region, Site, and Department menus.
- **5** Fill in the fields in the General tab:
  - Serial Number—Type the serial number of the asset.
  - Install Date—Enter the expected installation date for the asset.
  - **Note:** When the asset's status is set to Deployed, this field is automatically set to the current date.



- Depreciation Cost—Select a currency type from the menu (for example, United States dollars). The code for that currency type (for example, USD) appears in the field. Then, enter the asset's depreciation value. Only managers and administrators can enter values in this field.
- Associations—This field enables you to group items. If applicable, select the item with which you want to associate the asset. You can select more than one value. All associations are listed in the field. Associations are created by your administrator.
- Notes—Enter any notes pertinent to this asset. They will be saved in the Audit Trail when you save the asset.
- Y2K Compliant—Select Yes, No, or N/A.
- 6 Click Save to submit the new asset record.

# Searching for asset records

When you want to update an asset record, you must locate it first.

- ► To search for an asset record:
- From the Remedy IT Service Management Console, click Track Assets. The Select an Action Information dialog box is displayed.
- 2 Click Search for Asset.

The Search Asset Records form is displayed.

盟Remedy <sup>.</sup>	Remedy IT Service Manage	ment
Asset Information		
ID*+ Name Status*	Category* Type* Item*	▼         Region         ▼           ▼         Site         ▼           ▼         Department         ▼
General Asset Details Serial Number Install Date Y2K Compliant	Depreciation Co	ost v
Asset History		
Audit Trail		ц
Notes		<u>m</u>
Search Print Asset Re	sports Bulletin Board Close	Help



- 3 Fill in the fields that you want to use as search criteria.
- 4 Click Search.

In Windows, requests matching the search criteria are displayed in the Results pane. In the web view, matching records are listed in a table at the bottom of the form.

5 To view the details of an asset record, click on the item in the list.

# Searching for owners, users, or managers of assets

When you are creating new assets or modifying existing assets, you might need to search for records of owners, users, or managers of assets. These records are maintained in the People database.

- ▶ To search for the owner, user, or manager of an asset:
- 1 Display the asset record whose owner, user, or management information you want to find. For more information, see "Searching for asset records" on page 162.
- 2 In the Asset Information form, click the People tab.

Jsers, Owners and Ma	-		-	
Full Name Francie Frontline	Login Francie Frontline	Phone Number 333-4249	Role	
n en elementen (ill le	; render fortuine	00004490	:0307	

The owners, users, or managers related to this asset are listed in the table. If there are none, a message appears above the table stating that no owners, users, or managers were found for the asset.

3 To view the record in the table, select the record, and click View.

The record is displayed in the Person Information form.

# Adding and removing owners, users, or managers of assets

When you create a new asset record, you might find that you need to add or remove a user, owner, or manager for that asset.



- ▶ To add an owner, user, or manager for an asset:
- 1 Display the asset to which you want to add an owner, user, or manager.
- 2 In the Asset Information form, click the People tab.

Phone Number Role  333:4243 iUser	Login Francie Frontline			
00092450 10381	iriancie rionune	000*4240	LONG.	

**3** Click Add.

The Select Type dialog box appears.

盟Remedy <sup>.</sup>	
Select Type	
OK Cancel	

4 Select either Individual or Group, and click OK. The Search People dialog box appears.

鼦Remedy <sup>.</sup>		
Search Criteria		
Last Name	Department	
Full Name	Login Name	
Search	Clear Fields	
Search Results		
Last Name First Name	e Region Site	Department
View	Click to Reheah	
OK Cancel		



- 5 Enter search criteria in any of the fields, and click Search. Matching entries are listed in the Search Results table.
- 6 Select an entry, and click OK.
- 7 In the Select Role dialog box, select a role. Options are User, Owner, and Asset Manager.
- 8 Click OK.

A message reports that the selected person is now related to the asset, and that person's name is added to the Users, Owners, and Managers of this Asset table.

ll Name	Login	Phone Number	Role	
ancie Frontline	Francie Frontline	333-4243	User	

- 9 Click Save.
- 10 Click Close to close the Asset Information form.
- ▶ To remove an owner, user, or manager from an asset record:
- 1 In the Asset Information form, click the People tab.
- 2 Select the owner, user, or manager record you want to remove.
- 3 Click Remove.

The name is removed from the list.

# Modifying asset records

After you locate an asset record, you can modify it to reflect maintenance activity and to update the status.

- ► To modify an asset record:
- 1 Search for an asset as described in "Searching for asset records" on page 162.
- 2 Modify the asset record as needed.
- 3 Click Save.



# Working with asset components

Depending on the level of asset definition in your organization, you might also need to create asset components. These component records can be created when you create the main asset record, or you can create component records independently of the main asset.

# **Creating asset components**

If your organization tracks items such as disk drives and display monitors as components, you will need to create records for each of these components. For example, if you are configuring a new computer system for a requester and have created an asset record for the workstation, you will need to also create component records for the monitor, the hard drive, and the CD-ROM.

Whether a component is linked to an asset depends on whether you create it from the Remedy IT Service Management Console or from within an asset:

- If you create the component directly from the Remedy IT Service Management Console, the component is not linked to an asset unless you specifically relate it. It exists independently in inventory.
- If you create a component from within an asset, the component is automatically linked to that asset.
- To create an asset component from the Remedy IT Service Management Console:
- From the Remedy IT Service Management Console, click Track Assets. The Select an Action dialog box is displayed.

盟Remedy <sup>.</sup>		
Select an Action		
New Asset	New Component	
Search for Asset	Search for Component	
Close		

2 Click New Component.



#### The Component Information form is displayed.

龆Remedy <sup>.</sup>	Remedy IT Service Management	
Component Informati	on	
ID*+   Serial Number   Status*  In Inventory	Category* Type* Item*	Region     Site     Department
General Component Details Main Asset ID Install Date	Part Number Uersion Licenses	
Component History Audit Trail Notes		<u>m</u>
Save Print Component	Close	Hep

- **3** Fill in all the required fields, shown in bold font on the form:
  - ID—Enter a unique alphanumeric value in the ID field.
  - Status—Select a value. If you choose Relate to Main Asset, you can relate the component to an existing asset.
  - **Category**—Select a category. The values you can choose are determined by the administrator.
  - Type—Select a type. The values you can choose are determined by the category you chose, and by the administrator.
  - Item—Select an item. The values you can choose are determined by the type you chose, and by the administrator.
- 4 Select values for the Region, Site, and Department fields.
- 5 In the Serial Number field, enter the component's serial number.
- **6** If applicable, in the Main Asset ID field in the General tab, enter the ID of the main asset.

This field is enabled only if Related to Main Asset is selected in the Status field. To view a list of existing assets:

**a** Click in the field, and press Enter.

A selection list is displayed, showing the ID numbers for existing assets.

**b** Select the asset that you want to relate the component to.



c Click OK.

The asset ID appears in the field.

- 7 Fill in the remaining fields in the General tab:
  - Install Date—Enter the component's installation date, if applicable.
  - Part Number—Enter the component's part number, if applicable.
  - Version—Enter the component's version number, if applicable.
  - Licenses—Enter the number of licenses available for the component, if applicable.
  - Notes—Enter any relevant comments about the asset. When the component record is saved, your notes will be added to the audit trail.
- 8 Click Save to create the asset record.
- 9 Click Close to close the Asset Component form.

#### • To create an asset component from within an asset record:

- 1 Display the asset record to which you want to add a component.
- 2 Click the Components tab.

General Compo	nents People Rela	ted Items				
Components	Linked to This Ass	et No	components were fou	nd linked to this ass	et.	
Component ID	Part Number	Status	Site	Category	Туре	Item
•						F
View	Create New Componen	t Search For	Inventoru Petur	n To Inventory		
	steate wew component	Jeaichnio	Inventory neta	I TO INVENCITY		

3 Click Create New Component.



#### The Component Information form is displayed.

鼦Remedy <sup>.</sup>	Remedy IT Service Management	
Component Informati	on	
ID*+   Serial Number   Status*  In Inventory	Category*	r     Region       r     Site       r     Department
General Component Details Main Asset ID Install Date	Part Number Version	
Component History		
Audit Trail		<u>m</u>
Notes		<u> </u>
Save Print Component	Close	Help

4 Fill in the fields, as described in "To create an asset component from the Remedy IT Service Management Console:" on page 166.

The Main Asset ID field automatically contains the ID of the asset from which you are creating the component. You cannot change this entry.

- 5 When you are finished, click Save.
- 6 Click Close to close the form.

The component that you have created is listed in the Components tab of the asset record.

# Searching for asset components

When responding to a help desk case, it is useful to know which components are a part of the main asset.

- ► To search for an asset component record:
- On the Remedy IT Service Management Console, click Track Assets. The Select an Action dialog box is displayed.
- 2 Click Search for Component.

習Remedy <sup>.</sup>	Remedy IT Service Management	
Component Informat	ion	
ID*+ Serial Number Status*	Category* Type* Item*	Region 🖉 🗸 Site 🖉
General Component Details Main Asset ID Install Date	Part Number	
Component History Audit Trail Notes	Licenses	<b>四</b>
Search Print Component	Close	Help

The Component Information form is displayed.

- **3** Fill in the fields that you want to use as search criteria.
- 4 Click Search.

In Windows, asset components matching the search criteria are displayed in the Results pane. In the web, matching asset records are listed in the table at the bottom of the form.

5 To view the details of an asset component, click on the item in the list.

The asset component is displayed in the Details pane.

# Linking asset components to asset records

You can search for asset components in inventory, and link them to asset records. If you need to remove a linked component, you can do so and thereby return the component to inventory.

#### • To search for a component in inventory:

- 1 Display an asset record.
- 2 In the Asset Information form, click the Components tab.
- **3** Click Search for Inventory.



The Components in Inventory form is displayed.

韶Remedy <sup>.</sup>					
Search Criteria					
Category   Type   Item   Search   Clear Fiel	ds				
Search Results Component ID	Part Number	Serial Number	Status	Site	
		Click to Refress	<i>,</i>		

- **4** Select the search criteria by selecting values for the Category, Type, and Item fields.
- 5 Click Search.

The Search Results table displays the list of possible matches.

- **6** To perform another search with different criteria, click Clear Fields, select the new criteria, and click Search.
- 7 Click Close to close the form.
- To link a component to an asset record:
- 1 Open the asset record to which you want to link a component.
- **2** Search for the component as described in "To search for a component in inventory:" on page 170.
- **3** To view a component, select the item in the Search Results table, and click Details.

The Asset Component form is displayed. You can modify the asset component if necessary.

- 4 Click Close to close the form.
- **5** To relate the component in inventory to the current asset record, click Link To Asset.

A dialog box reports that the component has been linked to the asset.



- 6 Click OK to dismiss the message.
- 7 Click Close to close the Components in Inventory form.
- To remove a linked component from an asset record:
- 1 Open the asset record from which you want to remove a component.
- 2 Click the Components tab.

The components that are linked to the asset are listed.

- **3** Select the component that you want to remove.
- 4 Click Return To Inventory.

The component is removed from the list.

# Working with related items

Assets can affect, and can be affected by, help desk cases and change requests. Remedy Help Desk enables you to create relationships between assets, help desk cases, and change requests to reduce potential conflicts over IT resources.

You can relate assets to each other, to change requests, or to help desk cases:

- Relating assets to other assets—When you work with an asset, you might need to work with a related asset. For example, you might have a printer to which many computers are connected. You could create relationships between the asset records of the printer and the computers connected to it, which could help you quickly determine who has access to the printer.
- Relating assets to change requests—When you work with an asset record, you might need to work with a related change request. For example, if a change request requires ordering an asset, you can relate the asset to the change request when you receive the asset.
- Relating assets to help desk cases—When you work with an asset record, you might need to work with a related help desk case. For example, if the solution to a help desk case is to add more memory to a workstation, you may need to relate the help desk case (there is not enough memory) to the asset record for the workstation (purchasing additional memory).
- ► To view requests related to an asset record:
- 1 Open an asset record.
- 2 Click the Related Items tab.



- 3 From the Show menu, choose the related requests that you want to view:
  - All Related Items shows all related asset records, change requests, and help desk cases.
  - Related Assets shows only the related asset records.
  - **Related Change Requests** shows only the related change requests.
  - **Related Help Desk Cases** shows only the related help desk cases.

All specified requests are displayed in the Related Items table.

General Components People Related Items		
Current Relationships		1
Show All Related Items		
Related Items		
Asset (12344 Sun UltraSPARC 10)		
Refresh View Remove Relationship		
Create New Related Record	Search for Existing Record to Relate	
Record Type	Record Type	
Asset Records   Create	Asset Records 🗸 Search	
		1
Save Print Asset Reports Bulletin Board Close	He	Ð

If no related items exist for the request, a message appears above the table stating that no related items were found.

4 To view a related request, select it, and click View.

The request is displayed in its form.

#### • To remove a related request from an asset record:

- 1 Open an asset record.
- 2 Click the Related Items tab.
- **3** From the Show menu, select one of the options to specify the type of requests to display. Options are Asset Records, Change Requests, and Help Desk Cases.

All of the specified requests are displayed in the Related Items table.

If no related items exist for the request, a message appears above the table.

- **4** To remove a relationship, select an item, and click Remove Relationship. A message asks you to confirm that you want to remove the relationship.
- 5 Click Yes.
- 6 Click Save to save the changes to the asset.



- ▶ To relate a new request to an asset record:
- 1 Open an asset record.
- 2 Click the Related Items tab.
- **3** In the Create New Related Record region, select a request type from the Record Type field. Options are Asset Records, Change Requests, and Help Desk Cases.
- 4 Click Create.

The form for that request is displayed.

- **5** Create a new request:
  - For information about creating a new asset record, see "Creating asset records" on page 160.
  - For information about creating a new change request, see "Creating a new change request" on page 123.
  - For information about creating a new help desk case, see "Creating a new help desk case" on page 86.
- 6 When you have finished creating the new request, click Save.

A message reports that you have created a new request. Another message tells you that the two requests have been related.

7 Click OK to close each dialog box.

The form for the new request closes.

- 8 If the related item does not appear in the Related Items table, refresh the table manually by clicking the Refresh button.
- 9 Click Save to save the changes.
- To relate existing requests to an asset record:
- 1 Open an asset record.
- 2 Click the Related Items tab.
- **3** In the Search for Existing Record to Relate region, select the appropriate request type from the Record Type field.
- 4 Click Search.



The Search and Relate dialog box is displayed, listing the requests according to the value in the Search with the Same field.

昭Remedy <sup>.</sup>			
Search Criteria			
Search for*	Asset Records	•	
Predefined Advanced			
Search with the Same*	Category, Type, and Item	×	
	Asset Name Asset Iter codit Sun Ultra	n Asset Status SPARC 10 Deployed	Asset User Erica Engineer
00000005 00000006	Sun Ultra Sun Ultra	SPARC 10 Ordered SPARC 10 Ordered SPARC 10 Ordered SPARC 10 Being Assembled	Demo
View Relate			
Close			

- **5** In the Search with the Same field, select another value if you want to change the search. Or, to refine the search criteria, click the Advanced tab and enter more specific search criteria.
- 6 Click Search.

The Search Results list shows the requests matching the search criteria.

- 7 To view more information about a request, select it, and click Details. The request is displayed.
- 8 Click Close.
- **9** To relate a request, select it, and click Relate.

A message reports that the request has been related.

**10** Click Save to save the asset record.

Remedy Help Desk 5.5



# **T** Help Desk Management

The Remedy Help Desk Management application enables the management of an IT organization to oversee its daily operations. The following topic areas provide information about the Management role of the Help Desk application and the activities you can perform as a manager.

- "Working with Remedy Help Desk as management" on page 178
- "Approving solutions" on page 181
- "Handling reassignment requests" on page 183
- "Handling escalations" on page 186
- "Reviewing surveys" on page 188
- "Working with reports" on page 189
- "Using the Bulletin Board" on page 189
- "Using reminders" on page 189
- "Creating new help desk cases and change requests" on page 190
- "Searching for requests" on page 190
- "Creating and tracking assets" on page 190

# Working with Remedy Help Desk as management

Managers oversee operation of the IT organization. This includes performing daily management activities (such as handling escalations and approving solutions) and tracking performance measurements related to the IT organization.

Managers can run reports on help desk cases, on change requests, and on asset inventory. These reports enable managers to plan resources and to identify trends in the types of upcoming cases, change requests and tasks, and assets that warrant further investigation. Managers can also view reports based on customer satisfaction feedback on help desk cases and change requests.

**Note:** The Remedy Help Desk Management application includes all the functionality of the Remedy Help Desk Support application and its three modules. Managers can perform all the tasks that the support staff can perform using the Remedy Help Desk Support application—set the same preferences, use reminders, and perform many other functions. The following sections, therefore, cover only those activities that managers can do in *addition* to the support tasks. For instructions about providing support tasks, see the following sections:

- "Remedy Help Desk Support" on page 53
- "Working with the Help Desk Module as Support" on page 83
- "Working with the Change Tasking Module as Support" on page 119
- "Working with the Asset Inventory Module as Support" on page 159
- ▶ To access the Remedy Help Desk Management application in Windows:
- 1 Double-click the icon that your administrator has set up for you on your desktop.

The Login dialog box is displayed.

2 Enter your AR System user name and password, and click OK.

Unless your administrator has provided specific information for the Authentication field, you may leave that field blank.



盟Remedy <sup>.</sup>	Remedy IT Service Management
Quick Links	IT Service Management Console
New Request	Manage Requests
Search for Request	View By: Escalated Requests
<u>Search Task</u>	Request ID Summary Requester Escalated? Status Priority Assigned To
<u>Track Assets</u> Manage SLAs	HD000000000004 Dennotsave a Satah Sales Yes Assigned High Francie Frankin HD000000000061 Not enough mel-loe User Yes Assigned Low Demo HD000000000062 Not enough mel-loe User Yes Assigned Low Demo
Other	
<u>Reports</u>	
Reminders	
Preferences	
<u>Help</u>	View Refresh
	Bulletin Board
	Create-date         Priority         Short-Description           10/23/02 3 54:32 PM         High         Engineering printer 3 is down           10/23/02 3 55:49 PM         High         Voicemail is not accessible in Dallas offic
	View Create Delete Refresh

The Remedy IT Service Management Console is displayed.

- ▶ To access the Remedy Help Desk Management application from a browser:
- 1 From a browser, enter the following URL:

http://<web\_server>:<port>/arsys/apps/default/<ar\_server>/ITSMHD/ RemedyManager\_Administrator.jsp

The Login window is displayed.

- 2 Enter your AR System user name and password.
- **3** Click Login.
- 4 The IT Service Management Console for the Management application is displayed.

# Using the Remedy IT Service Management Console

The Remedy IT Service Management Console is the primary interface for your work as a Remedy Help Desk manager. It provides the following links:

#### **Quick Links**

- New Request
- Search for Request
- Search Task
- Track Assets



#### Other

- Reports
- Reminders
- Preferences
- Help
- Logout (web only)

The following paragraphs explain these options.

# **New Request**

Click New Request to create a new request. The form that opens depends on how you have set your New Request Action preference. See "Setting personal preferences and options" on page 66 for more information.

# **Search for Request**

Select Search for Request to search for existing requests. The form that opens depends on how you have set your Search for Request Action preference. See "Setting personal preferences and options" on page 66 for more information.

# Search Task

Select Search Task to search for existing change tasks.

# **Track Assets**

Select the Track Assets to display the Track Asset Information dialog box, from which you can create and search for assets and components.

# Reports

Select Reporting to generate predefined reports on help desk cases, change requests, and asset records. You can view reports with the built-in Crystal Reports viewer. For more information about reporting, see Chapter 8, "Working with reports."

# Reminders

Select Reminders to create and display reminders.

## Help

Select Help to display online help for the Support role.

# 

#### Using the Manager View By menu

The View By menu in the Remedy IT Service Management Console provides an easy way for you to access lists of important requests and other information.

#### ► To use the View By menu:

- 1 On the Remedy IT Service Management Console, select an item from the View menu. The following options are available:
  - Escalated Requests lists all requests that have been escalated. For information about working with escalations, see "Handling escalations" on page 186.
  - Urgent Requests lists all requests that have Urgent priority.
  - High Requests lists all requests that have High priority.
  - **Requests Assigned To** enables you to enter or select a person's name to view a list of all requests assigned to that person.
  - All Open Requests lists all requests that have not been resolved or closed.
  - Solutions to Approve lists all solutions that you are requested to approve. For information about working with solutions, see "Approving solutions" on page 181.
  - **Reassignment Requests** lists all requests that you have been asked to reassign. For information about reassigning requests, see "Handling reassignment requests" on page 183.
  - Responded to Surveys lists all the surveys that requesters completed after their requests were resolved. For information about survey responses, see "Reviewing surveys" on page 188.

If there are no matching request for the type you specified, a message is displayed on the console.

2 To open an item in the list, select it, and click View.

The item appears in its form.

# **Approving solutions**

When a support staff member proposes a solution for a help desk case, you are notified of the solution requiring approval. You can then review the solution for completeness and accuracy, and you can approve or reject it. When you approve it, the solution becomes available to support staff and requesters for general use.



#### ► To approve a solution:

1 In the Remedy IT Service Management Console, select Solutions to Approve from the View By menu.

Solutions pending approval are listed.

鼦Remedy <sup>.</sup>	Remedy IT Service Management
Quick Links New Request Search for Request	IT Service Management Console Manage Requests View By: Solutions to Approve
Search Task Track Assets Manage SLAs Other	Solution Summary Submitted By Associate the file to a program Sam Secondlevel Select a printer with RAM for graphics. Sam Secondlevel
Reports Reminders Preferences	
<u>Help</u>	View         Refresh           Bulletin Board         Create-date           Create-date         Priority           10/23/02/3/54-32 PM         High           10/23/02/3/554/9 PM         High
	View Create Delete Refresh

2 Select the solution you want to review, and click View.

The Solution form opens, showing additional information about the solution.

盟 Reme	edy <sup>.</sup>						
Solutio	n						
Solution D	etails						
Summary*	Associate the file to a	program			History Log		Û
Description	In Windows Explorer,	select View	w and then Options.	Add a new type for the	file you want to be a	ssociated with a	
Status*	Proposed	•	Submitted By*	Sam Secondlevel	Modified By	·	
Count			Created		Modified		
Case Desc	ription						
Category	Hardware	-	Summary*	Errors when starting ma	chine		
Туре	Desktop/Workstation	-	Description	I receive an error when	starting my system.		
Item	Dell	-		List All Cases			
	~	_					<u>Help</u>
Save	Close						

- **3** To change the solution, edit the Summary and Description fields as needed.
- 4 Make the appropriate selection in the Status field.



- To approve the solution, choose **Current**.
- If you do not want to approve the solution, choose Obsolete.
- If you do not understand the solution, leave its status as **Proposed**, and contact the support individual who suggested it.
- **5** Optionally, enter information in the History Log that pertains to the approval of this solution; for example, the reason the solution was not approved, or changes you made to the solution before approving it.
- 6 Click Save.

# Handling reassignment requests

When a support staff member indicates that they want a help desk case or change request reassigned to someone else, you are notified. After reviewing the reassignment request, you can assign the request to another support staff member, or you can deny the request.

## Reassigning help desk cases

- To respond to reassignment requests for help desk cases:
- 1 In the Remedy IT Service Management Console, select Reassignment Requests from the View By menu.

All cases requiring reassignment are listed in the table.

- 2 Select the case that you want to reassign.
- **3** Click View.

The case is displayed.

- 4 Review the case.
- 5 Reassign the case, or deny the reassignment.

To reassign the case:

- **a** If appropriate, modify the group and individual information.
  - Select another group from the Group field.



• Select another support staff member from the Individual field.

鼦Reme	edy <sup>.</sup>	Remedy	Help Des	k	
Help De	sk Case				
Summary*	Not enough memory to	o print		•	
Description	I am getting the error '	'not enough mer	nory to print."		
Category*	Printing	•	Case ID+	HD000000000061	
Type*	Printer Failure/Error	•	Service		•
ltem*	Not Enough Memory E	Tron 🔻	Group+		•
Auto-ReAssig	n III		Individual+	Demo	•

#### **b** Click the Activity tab.

Case Log		Time Information
Work Log	$\mathfrak{m}$	Assigned 10/23/2002 4:00:03 PM
		Resolved
Time Spent Resolving Case		Amival Time 10/22/2002 12:23:36 PM
Estimated Total Time 0 📑 Start Time Start Clock Stop Clock		Other Activities Request Reassignment
Time Spent (min)		

- c In the Request Reassignment field, select No.
- d Click Save.

A message reports that the support staff member requesting reassignment and the newly assigned support staff member have both been notified of the reassignment.

If you decide not to reassign the case:

- a In the Request Reassignment field, select No.
- **b** Click Save.

A message reports that the support staff member has been informed that the request for reassignment was denied.

6 Click Close.

### **Reassigning change requests**

- To respond to reassignment requests for change requests:
- 1 In the Remedy IT Service Management Console, choose Reassignment Requests from the View By menu.

All requests requiring reassignment are listed in the table.

- 2 Select the change request that you want to reassign.
- **3** Click View.

The selected change request is displayed.

- **4** Review the change request.
- 5 Reassign the change request, or deny the reassignment.

To reassign the change request:

- a If appropriate, modify the group and individual names in the General tab.
  - Select another group from the Group field.
  - Select another supervisor from the Supervisor field.
- **b** Click the Activity tab.
- c In the Request Reassignment field, select No.
- d Click Save.

A message reports that the support staff member requesting reassignment and the newly assigned support staff member have both been notified of the reassignment.

If you decide not to reassign the request:

- a In the Request Reassignment field, select No.
- **b** Click Save.

A dialog box reports that the support staff member has been informed that the request for reassignment was denied.

6 Click Close to close the form.

#### **Reassigning change tasks**

- To respond to reassignment requests for change tasks:
- 1 In the Remedy IT Service Management Console, select Reassignment Requests from the View menu.

All requests requiring reassignment are listed in the table.

- 2 Select the change task that you want to reassign.
- 3 Click Details.

The selected task is displayed.

- 4 Review the task.
- 5 Reassign the task, or deny the reassignment.



To reassign the task:

- a If appropriate, select another group from the Group field.
- b If appropriate, select another supervisor from the Supervisor field.
- c In the Request Reassignment field, select No.
- d Click Save.

A message reports that the support staff member requesting reassignment and the newly assigned support staff member have both been notified of the reassignment.

If you decide not to reassign the task:

- a In the Request Reassignment field, select No.
- **b** Click Save.

A message reports that the support staff member has been informed that the request for reassignment was denied.

6 Click Close to close the form.

# Handling escalations

When escalations are enabled, Help Desk cases and change requests are automatically escalated as soon as escalation criteria are met. Escalation criteria are set by the Help Desk administrator. For example, a case could be escalated if it is not marked a Work in Progress within a certain time period.

When an escalation occurs, you are notified. Strategies for dealing with escalations differ among organizations, but can include the following actions:

- Reassigning the escalated request to another support staff member
- Contacting the requester for more information about the request

#### **Reassigning an escalated request**

When a request is escalated, it might need to be reassigned to a specific supervisor or group. For example, an organization might have a group that focuses specifically on escalations.

Use the following procedure to escalate a change request or help desk case.



- ► To reassign an escalated request:
- 1 Choose Escalated Requests from the View By menu.

A list of all escalated cases and requests appears.

- 2 Select the escalated request that you want to reassign.
- **3** Click View.

The escalated request is displayed.

鼦Reme	edy Rem	nedy H	lelp Des	k		$\sim$		
Help Des	Help Desk Case							
Summary*	Not enough memory to print							-
Description*	I am getting the error "not end	ugh mem	ory to print."			Status* 🛛	ssigned	•
Category*	Printing	-	Case ID+	HD000000000061		Pending 🛛		•
Туре*	Printer Failure/Error	-	Service		-	Closure Code		•
ltem*	Not Enough Memory Error	-	Group+		-	Escalated?	es	•
Auto-ReAssign	E		Individual+	Demo	-	Priority*	ow	T
Requester Inf	ormation Activity Duplicates	Solutio	ns   Related I	tems Problem Management	1			
Login*+	Joe User	]	Region	USA	-	Source*	Phone	-
Name*+	Joe User	Profile	Site	1505 Salado, Mountain Vi	-	Submitted by	Demo	
VIP	No		Department	Finance	-	Urgency	Low	-
Phone	777-7272		Office	12 A				
Requester's Cases     Requester's Assets       Case ID+ Summary Status     Category Type       H000000 (Dopy mae Work In Pt Facilities     Office Equil Coder       HD000000 (Red ecc Work In Pt Facilities     Safety and Badge       HD000000 (Question a Assigned Software SAP     F1F inancial       Wiew     Refresh								
Save P	Print Case Reports Bulle	tin Board	Reminders	Close				<u>Help</u>



- 4 Select a new staff member:
  - In a Help Desk Case form, select a new Group or Individual from the fields in the upper part of the form.

鼦Reme	edy Remea	ly Help De	sk					
Help Des	sk Case							
Summary*	Not enough memory to print	Not enough memory to print						
Description	I am getting the error "not enough	memory to print."						
Category*	Printing 🗸 🗸	Case ID+	HD 000000000061					
Туре*	Printer Failure/Error	Service	-					
ltem*	Not Enough Memory Error	Group+	<b>•</b>					
Auto-ReAssig	n	Individual+	Demo 💌					

 In a Change Request form, select a new Group and Supervisor in the Support Information region of the General tab.

General Assessment Tasks Activity Related Items							
Requester Information		Location			Support Information		
Login*+	HD Support Chou		Scope*	Global 💌		Group+	Support-Hardware
Name*+	HD Support Chou	Profile	Region		-	Supervisor+	•
VIP	No 🔽		Site		-	Nodified-by	AR_ESCALATOR
Phone			Department		-	Nodified	3/20/2003 9:03:04 AM
Requested Date	;+		Office			Created	3/19/2003 5:32:42 PM
Submitted by	HD Support Chou						

5 Click Save.

A message reports that the original support staff member and the newly assigned staff member have both been notified of the reassignment.

# **Reviewing surveys**

When a requester's help desk case is resolved by the support staff, the requester is notified. The requester then can close the case.

After closing a resolved case, the requester is prompted to fill out a survey about how the case was handled. You can access and review all completed surveys.

**Note:** For requesters to be able to complete surveys, the AR System server must be configured by your administrator to enable requesters to modify their requests without a write license. If requesters cannot complete surveys, consult your administrator.



- To review requesters' surveys:
- 1 Choose Responded to Surveys from the View menu.

A list of all completed surveys appears.

- 2 Select the survey you want to review.
- 3 Click View.

The Survey dialog box is displayed.

- **4** When you are finished reviewing the survey, select Processed in the Status field.
- 5 Click Save.

# Working with reports

The reporting feature enables you to generate predefined reports for each module. You can use these reports to track inventory, change requests, and help desk cases—and monitor performance, satisfaction levels, and many other functions.

For information about the various reports and for instructions on generating reports, see "Working with reports" on page 191.

# Using the Bulletin Board

You can use the Bulletin Board feature to view messages and to post messages to your group. Bulletin board messages enable you to stay informed about what is going on within your organization. For example, you can use them to monitor systems, share information, and distribute documents.

For information about using the Bulletin Board, see "Using the Bulletin Board" on page 72.

# **Using reminders**

Reminders enable you to create notes for yourself and others. You can send them by email or by AR System Alert, and you can specify when they will be sent.

For information about using reminders, see "Using reminders" on page 76.

# Creating new help desk cases and change requests

You can create new help desk cases and change requests by clicking New Request from the Remedy IT Service Management Console, and entering information in the form.

For detailed information about creating Help Desk cases and change requests, see "Creating a new help desk case" on page 86 and "Creating a new change request" on page 123.

# Searching for requests

You can search for existing requests by clicking the Search for Requests button. In the form that is displayed, you specify search criteria. Matching requests are listed in the Results pane above the form.

For detailed information about searching for help desk cases and change requests, see "Searching for help desk cases" on page 98 and "Searching for requests" on page 136.

# **Creating and tracking assets**

You can use the Asset Inventory module to create new asset and component records, search for existing asset and component records, and update records.

For detailed information about using the Asset Inventory module, see "Working with the Asset Inventory Module as Support" on page 159.



# Working with reports

The reporting feature enables support staff and managers to generate predefined reports for each module. These reports enable you to track inventory, change requests, and help desk cases—and monitor performance, satisfaction levels, and many other functions.

This section discusses the following topics:

- "Generating reports" on page 192
- "Predefined reports" on page 196



# **Generating reports**

The following sections provide instructions for generating predefined reports, and for creating reports with qualifications you specify.

## Generating predefined reports

You can generate any predefined report by selecting it from a menu, and selecting a destination.

Before you can view and print predefined reports, you must have a report server selected. For information about specifying a report server, see "To specify a report server for viewing and printing reports:" on page 39.

#### ► To generate a predefined report:

1 On the Remedy IT Service Management Console, click Reports.

The Report Console is displayed.

習Reme	dy <sup>.</sup>							
Report C	onsole							
Report Name	•	•						
Define Rep	ort Qualification							
Select Saved	Qualification							
Select the fields	that you want to search					Qualify	your report by entering a value	
Field 1		-	Operand		•	Value		
Field 2		-	Operand		•	Value		
Field 3		-	Operand		•	Value		
Field 4		-	Operand		•	Value		
Field 5		-	Operand		•	Value		
Qualification								
	Advanced Qualificatio							
Destination		n n Report	Save Qualif	ication Clear	Quali	ification	Close	<u>Help</u>

- 2 Select a reporting area from the Report Name cascading menu.
  - For information about the Asset Inventory module report types, see "Asset information" on page 196.
  - For information about the **Change Tasking** module report types, see "Change information" on page 198.
  - For information about the Help Desk module report types, see "Help Desk" on page 201.



- **3** Select a destination for the report.
  - Screen displays the report in a separate window.
  - Printer enables you to print the report at a printer you specify.
  - File enables you to store a copy of the report to a directory you specify.
- 4 Click Run Report.

### Generating reports using qualifications

You can generate a report using search criteria that you or another user has saved previously, or you can specify searches yourself and save them.

- ▶ To generate a report from a saved qualification:
- 1 From the Report Console, click Select Saved Qualification.

The Saved Qualification dialog box is displayed, listing the existing qualifications.

盟Remedy <sup>.</sup>	
Saved Qualifications	
Qualification Name Closed Cases	Qualification "Status" = "Closed"
Return Selected Close	Delete Selected

- 2 Select a qualification, and click Return Selected.
- 3 Click Close to return to the Report Console.

The search criteria from the selected qualification are displayed.

- 4 Select a destination for the report.
  - Screen displays the report in a separate window.
  - **Printer** enables you to print the report at a printer you specify.
  - File enables you to store a copy of the report to a directory you specify.
- 5 Click Run Report.
- 6 Click Close to close the Report Console.



#### ► To create qualifications for reports:

1 In the Report Console, enter the search criteria for the report you want to generate.

Select the fields that you want to search			Qualify your report by entering a value
Field 1	•	Operand 📃 💌	Value
Field 2	•	Operand 📃 💌	Value
Field 3	•	Operand 📃 💌	Value
Field 4	•	Operand 📃 💌	Value
Field 5	•	Operand 📃 💌	Value

- **a** In the first column (Field <n>), select a field on which you want to search.
- **b** In the second column (Operand), select an operator; for example, = (the equal sign) for matching entries.
- c In the third column (Value), enter a value by which you want to search. For example, to find all Help Desk cases assigned to Bob Backline, enter Bob Backline as the value.
- d Repeat these steps to refine the search further.

You can also use the advanced search bar to specify a qualification.

e Click the Advanced Qualification button.

The Advanced Qualification Builder dialog box is displayed.

<b>昭</b> Remed	ly:	
Advance	d Qualification Builder	
Current Form	HPD:HelpDesk Select Fields from Current Form	
()"	+ · * / % = != < > <= >= LIKE AND OR NOT KEYWORDS	•
Qualification		
Save	Cancel	

f In the Qualification field, enter the criteria for the report data you want.

You can enter the qualification manually, or use buttons and selection lists to build your qualification. The selections you make appear in the Qualification field.

- g Select Save.
- h The search criteria you selected appear in the Qualification field of the Report Console.



- **2** To save the qualification for future use, click Save Qualification.
- **3** In the dialog box that appears, enter a name for the qualification, and click Save.
- **4** Select a destination for the report.
  - Screen displays the report in a separate window.
  - **Printer** enables you to print the report at a printer you specify.
  - File enables you to store a copy of the report to a directory you specify.
- **5** Click Run Report.

# **Predefined reports**

Predefined reports enable you to quickly generate information about:

- assets and asset components
- change requests and change tasks
- help desk cases, customer satisfaction surveys, and solutions.

The following sections describe the predefined reports that are available for each module.

### **Asset information**

The following reports provide information about assets and asset components.

#### **Asset Information > Assets**

Changes	
By Status for Date Range	Displays assets that have changed Status during the date range, organized by Status. Total asset changes for each Status are also shown.
Counts	
By Category	Displays assets, organized by Category, Type, and Item. Total counts for assets of each category and the overall number of assets are also shown.
By Department	Displays assets, organized by Department. Total counts of assets for each department are also shown.
By Site	Displays assets, organized by Site. Total counts of assets at each site are also shown.
By Status	Displays assets, organized by Status. Total counts of assets of each Status are also shown.
Open Cases	
Assets Showing Open Cases	Displays all assets having open help desk cases associated with them, grouped by category, and stating the total number of assets.
	If the Help Desk module is not installed on the server, this report is not available.

# 

#### Report (Menu List Choice) Description

Open Changes

-1	
Assets Showing Open Changes	Displays all assets having open change requests associated with them.

#### **Asset Information > Components**

Report (Menu List Choice)	Description
Component Changes	
By Status for Date Range	Displays components that have changed Status during the date range, organized by Status. Total component changes for each Status are also shown.
Component Counts	
By Category	Displays all components, organized by Category, Type, and Item. Total counts for components of each Category and the overall number of components are also shown.
By Department	Displays all components, organized by Department. Total counts of components for each Department are also shown.
By Site	Displays all components, organized by Site. Total counts of components at each Site are also shown.
By Status	Displays all components, organized by Status. Total counts of components of each Status are also shown.



# **Change information**

The following reports provide information about change request and change task activity.

#### **Change Information > Change Requests**

Report (Menu List Choice)	Description
Department	
Changes by Department and Actual Start Date	Displays all change requests, grouped by department, where the actual start date is within the date range you specify for the report.
Changes by Department and Planned Start Date	Displays all change requests, grouped by department, where the planned start date is within the date range you specify for the report.
Changes by Department and Status	Displays all change requests, grouped by department, with calculated totals for each status category.
Details	
Change Detailed Worklog	Displays detailed information for each change request, organized alphabetically by supervisor.
Region	
Changes by Region and Status	Displays all change requests, grouped by region, with calculated totals for each status category.
Changes by Region and Actual Start Date	Displays all change requests, grouped by region, where the actual start date is within the date range you specify for the report.
Changes by Region and Planned Start Date	Displays all change requests, grouped by region, where the planned start date is within the date range you specify for the report.
Requests and Tasks	
Changes and Tasks by Implementor and Status	Displays the change requests and tasks with implementor and status. Items are grouped by change request ID, with totals for each change request.
Changes and Tasks by Status and Type	Displays the change requests and tasks with status and category, type, and item. Items are grouped by change request ID, with totals for each change request.

# 

Site	
Changes by Site and Actual Date	Displays all change requests, grouped by site, where the actual start date is within the range you specify for the report.
Changes by Site and Planned Start Date	Displays all change requests, grouped by site, where the planned start date is within the range you specify for the report.
Changes by Site and Status	Displays all change requests, grouped by site, with calculated totals for each status category.
Status	
Change Status by Department	Displays all change requests, grouped by status, with subtotals calculated for each department by status and total for each status calculated.
Change Status by Region	Displays all change requests, grouped by status, with subtotals calculated for each region by status and total for each status calculated.
Change Status by Supervisor	Displays all change requests, grouped by status, with subtotals calculated for each supervisor by status and total for each status calculated.
Supervisor	
Changes by Supervisor Region and Site	Displays all change requests, grouped by supervisor, with calculated totals for each region and site combination.
Changes by Supervisor and Actual Start Date	Displays all change requests, grouped by supervisor, where the actual start date is within the range you specify for the report.
Changes by Supervisor and Closure Code	Displays all change requests, grouped by supervisor, with calculated totals for each closure code.
Changes by Supervisor and Planned Start Date	Displays all change requests, grouped by supervisor, where the planned start date is within the range you specify for the report.
Changes by Supervisor and Status	Displays all change requests, grouped by supervisor, with calculated totals for each status.
Changes by Supervisor and Site	Displays all change requests, grouped by supervisor, with calculated totals for each site.



#### Change Information > Tasks

Implementor	
Tasks by Implementor and Actual Start Date	Displays all change tasks, grouped by implementor, with calculated totals for each actual start date.
Tasks by Implementor and Closure Code	Displays all change tasks, grouped by implementor, with calculated totals for each closure code.
Tasks by Implementor and Planned Start Date	Displays all change tasks, grouped by implementor, with calculated totals for each planned start date.
Tasks by Implementor and Site	Displays all change tasks, grouped by implementor nd by site, with calculated totals for each implementor and site.
Tasks by Implementor and Status	Displays all change tasks, grouped by implementor, with calculated totals for each status category.
Status	
Tasks by Status and Type	Displays all change tasks, grouped by status, with calculated totals for each type.

# Help Desk

The following reports provide information about help desk cases, case activity, satisfaction surveys, and solutions.

#### Help Desk > Case Information

Report (Menu List Choice)	Description
All Cases for Date Range	
Case Details by Date Range	Displays all cases from the time frame specified, sorted by case ID.
Cases by Date Range Assignee	Displays all cases from the time frame specified, sorted by support staff assigned.
Cases by Date Range Category	Displays all cases from the time frame specified, sorted by the value in the Category field.
Cases by Date Range Group	Displays all cases from the time frame specified, sorted by help desk group.
Cases by Date Range Priority	Displays all cases from the time frame specified, delimited by priority.
Cases by Date Range Requester	Displays all cases from the time frame specified, sorted by value in the Requester field.
All Cases	
Case Details	Displays all cases, sorted by case ID.
Cases by Assignee	Displays all cases, grouped by assignee, with calculated totals for each assignee.
Cases by Category	Displays all cases, grouped by category, with calculated totals for each category.
Cases by Group	Displays all cases, grouped by group, with calculated totals for each group.
Cases by Priority	Displays all cases, grouped by priority, with calculated totals for each priority.
Cases by Requester	Displays all cases, grouped by requester, with calculated totals for each requester.
Cases with Related Assets	Displays cases and their related assets, grouped by case, with the total number of relationships between assets and cases.



Report (Menu List Choice)	Description
Cases with Related Changes	Displays cases and their related change requests, grouped by case, with the total number of relationships between change requests and cases.
Case Activity	
Case Activity by Assignee	Displays a summary of all case activity, including days active, sorted by assignee.
Case Labor Charges by Department	Displays the number of cases, total time spent, average time spent, and total labor charges, sorted by department.
Case Load by Assignee	Displays the case load handled by each assignee.
Case by Activity Times	Displays a summary of all case activity, including days active.
High Volume Cases by Departments Chart	Displays a chart of the first nine departments with the highest case volumes.
High Volume Case Requester Chart	Displays a chart of the requesters with the highest case volumes, sorted by category.
Monthly Case Volumes	Displays a list of the case volumes for each month in the specified time frame, according to open and resolved cases, and case priority.
Weekly Case Volume Graph	Displays a graph of the case volumes for each week in the specified time frame, and depicting the cases according to status.
My Open Cases	
My Open Cases by Category	Displays all open cases for the logged-in assignee, sorted according to category.
My Open Cases by Days Active	Displays all open cases for the logged-in assignee, sorted according to how many days they have been active.
My Open Cases by Priority	Displays all open cases for the logged-in assignee, sorted according to priority.
My Resolved Cases	
My Resolved Cases by Category	Displays all resolved cases for the logged-in assignee, sorted according to category.
My Resolved Cases by Days Active	Displays all resolved cases for the logged-in assignee, sorted according to how many days they were active.



Report (Menu List Choice)	Description
My Resolved Cases by Priority	Displays all resolved cases for the logged-in assignee, sorted according to priority.
Open Cases	
Case Volume by Assignee Charts	Displays a chart of all open cases, depicting the volume according to assignee.
Case Volume by Assignee Graph	Displays a graph of open cases, depicting the volume according to assignee.
Case Volume by Category Chart	Displays a chart of all open cases, depicting the volume according to category.
Case Volume by Category Graph	Displays a graph of open cases, depicting the volume according to category.
Case Volume by Priority and Status Charts	Displays two charts of all oen cases. One chart depicts the case volume according to priority; the other chart depicts the volume according to status.
Current Open Cases	
Open Case Counts by Category Type Item	Displays all open cases, from the time frame specified, with separate counts for each category, and the types and items within each category.
Open Cases for Date Range	Displays all open cases, from the time frame specified, sorted by case ID.
Resolved Cases	
Resolved Case Counts by Category Type Item	Displays all resolved and closed cases, with counts for each category, type, and item.
Resolved Case Volume by Assignee Charts	Displays a chart of resolved cases, depicting the volume according to assignee.
Resolved Case Volume by Assignee Graph	Displays a graph of all resolved cases, depicting the volume according to assignee.
Resolved Case Volume by Category Chart	Displays a chart of all resolved cases, depicting the volume according to category.
Resolved Case Volume by Category Graph	Displays a graph of all resolved cases, depicting the volume according to category.
Resolved Case Volume by Department Charts	Displays two charts of resolved cases. One chart depicts the case volume according to department; the other chart depicts the volume according to priority for each department.

#### List Choice)



#### Report (Menu List Choice) Description

Resolved Case Volume by Priority and Status Chart	Displays two charts of resolved cases. One chart depicts the case volume according to priority; the other depicts the volume according to status.
Resolved Case Volume by Root Cause	Displays a graph of resolved cases according to root cause, and a count for each cause.
Resolved Case Volume by Root Cause Graph	Displays a graph of resolved cases according to root cause.

#### Help Desk > Satisfaction Ratings

#### Report (Menu List Choice) Description

Surveys	
Survey Results by Assignee	Displays the number of cases and the average help desk satisfaction ratings for each assignee.
Survey Results by Department	Displays the number of cases and the average help desk satisfaction ratings for each department.
Survey Results by Month Graph	Displays a graph depicting the average help desk satisfaction ratings for each month.

#### Help Desk > Solutions

Current Solutions	
Solutions by Case Summary	Displays the current help desk solutions, grouped by case summary.
Solutions by Category Chart	Displays a chart of the current help desk solutions, divided according to categories.
Solutions by Category Detail	Displays the current help desk solutions, grouped by category.
Solutions by Category Graph	Displays a graph of the current help desk solutions, with each category shown.
Solutions by Frequency Usage	Displays the current help de-escalations, grouped by the number of times the solution was used.
Solutions by Solution Summary	Displays the current help desk solutions, grouped by solution summary.



Proposed Solutions	
Proposed Solutions by Case Summary	Displays the proposed help desk solutions, grouped by case summary.
Proposed Solutions by Category	Displays the proposed help desk solutions, grouped by category.
Proposed Solutions by Solution Summary	Displays the proposed help desk solutions, grouped by solution summary.

Remedy Help Desk 5.5



# Glossary

#### accelerated depreciation

Any method of depreciation that allows greater deductions in the earlier years of the life of an asset.

#### access control

A security feature in which AR System administrators limit the access users have to forms, to specific fields within a form, and to specific functions within the system. See also *group*, *permission* and *user*.

#### access permission

See permission.

#### action

A mechanism, such as an alert or a Set Fields action, for ensuring that SLA commitments are met. You can define one or more actions that will be associated with a milestone.

#### action request

See *request*.

#### Action Request System (AR System)

The premier application platform and development environment for delivering IT Service Management applications.

#### active link

Workflow that causes the AR System User Tool or web client to perform specific operations in response to specific user actions. AR System administrators can define many types of active links. For example, they can define active links that run macros, set fields to specified values, run independent system processes, send interactive messages to users, or change field characteristics. Active links run on the client machine.

#### active link guide

An ordered sequence of active links that together accomplish a specific operation. Active link guides can help lead users through a task (like a wizard) or can be used as subroutines to accomplish common tasks. Compare with filter guide.

#### additive installation

An installation procedure that enables you to select specific applications to install as additions to previously installed Remedy applications.

#### administrator

An individual responsible for the management of the AR System including setting up forms, setting access rights for users, and designing the workflow process.

#### administrator default

The value that AR System administrators assign to a field while designing a form. When users set defaults, this value is automatically entered in the field. Users can override the administrator default by assigning their own default or by entering a different value. See also *user default*.

#### Administrator group

One of several special access control groups that the AR System provides. Members of this group have full and unlimited access to the AR System, including unlimited ability to create forms, filters, escalations, active links, menu lists, guides, and applications. See also *Subadministrator group*.

#### advanced search bar

The row of buttons, Query field, and Fields list that appear at the bottom of the AR System User Tool Detail pane when the user clicks the Advanced button. You can use this bar to specify complex search criteria.

#### alert

A notification from an AR System server or other program to the user, indicating that certain conditions have occurred, such as a request has been submitted or progress has been made in resolving a request.

#### alert list

The list of alerts belonging to a user that can be displayed in AR System User Tool or on a web client.

#### allowable currency

A currency type that appears in the currency field list. Users may only use an allowable currency type when entering currency values. See also *currency code*, *currency data type*, and *functional currency*.

#### application

A group of forms (and associated workflow) that are collected by an administrator and that are related to a particular business function; for example, Remedy Help Desk. An application is also a server object in AR System Administrator.

#### application administrator

An individual responsible for the management of the Remedy applications, including setting up forms, setting access rights for users, and configuration.

#### approval process

A process used with Remedy Change Management and Asset Management, which generates electronic signature lines for items that require approval and tracks who has approved or rejected a given request.

#### approval server

A module within the AR System which routes forms to generate the appropriate signoff signatures. The Approval Server also creates an audit trail for authorizing AR System application forms.

#### **AR System**

See Action Request System (AR System).



#### **AR System Administrator**

The AR System client tool used by AR System administrators and subadministrators to set up the system for use by support staff and users. Setup includes setting up forms, setting access permissions (users and groups), and creating filters, escalations, active links, menu lists, guides, and applications.

#### **AR System Alert**

The AR System client tool through which an alert can be sent to a user. See also *notification*.

#### **AR System client**

The subset of AR System software necessary to enable users to access an AR System server on the network from a local workstation. The AR System client tools are AR System Administrator, AR System User Tool, AR System Import, and AR System Alert.

#### **AR System Configuration Tool**

The tool used to configure and manage the mid tier portion of the AR System.

#### **AR System Email Engine**

A server-based application that communicates with both the AR System server and an email server. The AR System Email Engine receives emails, and can parse and interpret these messages to execute specific instructions on an AR System form. It also sends emails the AR System and directs notifications as a result of filters and escalations.

#### **AR System Import**

The AR System client tool that enables AR System administrators to transfer data records from an archive file into a form.

#### **AR System License**

The AR System client tool used to apply and review software licenses that activate features of the AR System software.

#### AR System server

The full set of AR System software including the AR System server processes and fast, list, and escalation server processes. When installed on a workstation on the network, the server software provides access to the full feature set of the AR System and can be accessed by UNIX workstations or Windows PCs on the networks that are running the AR System client software.

#### **AR System User Tool**

The AR System client tool in which users enter and track requests through the resolution process. Users can also search the database, generate reports, and modify existing requests with AR System User Tool.

#### asset

Property with commercial business value: for example, a workstation. An asset may be a component or a main asset. See also *asset component* and *main asset*.

#### asset component

A subset of a main asset. For example, a monitor can be a component for a workstation serving as the main asset. See also *main asset*.

#### **Asset Inventory**

A module of the Remedy Help Desk application that is used to track asset, component, and bulk item inventory.

#### Remedy Help Desk 5.5

#### asset manager

The manager responsible for both strategy and day-to-day asset management functions, for example, updating assets and configurations, running reports, or negotiating contracts.

#### assignee

The person assigned responsibility for resolving a request.

#### Assignee group

One of several special access control groups that the AR System provides. Users automatically belong to this implicit group for requests for which they have been assigned responsibility (that is, their name is in the Assigned To field). See also *Assignee Group group*, *Submitter group*.

#### Assignee Group group

One of several special access control groups that the AR System provides. Users automatically belong to this implicit group for requests for which they are a member of the group assigned responsibility (that is, they are a member of the group whose name is in the Assignee Group field). See also *Assignee group*, *Submitter group*.

#### attachment

A field that enables you to allocate space for text, graphics, audio, or video attachments in the database.

#### attachment data type

The data type used for fields that need to hold files. This type enables you to store text, graphics, audio, or video attachments in the database.

#### audit trail

A log of events. Provides information about the type of event, a brief summary of the record, the date the record was created, and the person who submitted the record.

#### availability SLAs

Measures the time that an asset or service is available or unavailable.

#### book value

The value of an asset equal to the purchase cost minus the accumulated depreciation.

#### bulk items

Items that are *not* tracked by an individual record for each unit. Bulk items in inventory are tracked by quantities of an item type. For example, items such as cables do not require individual records but rather, one record for a bulk quantity of the specific cable type.

#### bulletin board

A Remedy IT Services application feature that enables users to create messages that can be viewed by the entire organization or by users in specific groups.

#### business hours tag

A tag that indicates which business hours to use. The tag is an entry in the Business Hours Workday form and must be created before you use these hours in an SLA. The entry in the form determines the hours to be used to calculate time.

#### button

A field on a form that a user can click to execute an active link. A bitmap can represent a button. See also *menu item*, *toolbar button*.

#### call center

A generic term that refers to reservation centers, help desks, information lines or customer service centers, regardless of how they are organized or what types of transactions they handle.

#### case

A request for service or information. The Remedy Help Desk application enables support staff to create and track help desk cases. A case is unique to the Help Desk module (as opposed to a *change request*, which is unique to the Change Tasking module).

#### case number

The number assigned to a help desk case once it has been created and saved.

#### **Change Advisory Board**

A committee put in place to approve and track change requests that are out of the scope of a project.

#### **Change Authority**

A group that is given the authority to approve change, for example by a project board. Sometimes referred to as the Configuration Board.

#### change flag

A status flag set when the contents of a field or form have been altered. A change flag can be polled or disabled by workflow

#### **Change Management**

The process of controlling changes to the infrastructure or any aspect of services, in a controlled manner, enabling approved changes with minimum disruption.

#### change request

A request for a planned activity. A change request can involve multiple change tasks.

A change request is unique to the Change Tasking module (as opposed to a case, which is unique to the Help Desk module).

#### change supervisor

A person responsible for updating status during the course of working help desk cases and processing change requests.

#### change task

A task related to a change request. A change request is resolved when all its related change tasks are closed. See also *dependent change tasks* and *peer tasks*.

#### character data type

The data type used for fields that contain alphanumeric text.

#### character menu

A menu that the AR System administrator can create and attach to any character field.

#### charge back

The process of charging departments or cost centers for the IT infrastructure required to support their business processes.

#### client

See AR System client.

#### client tier

The architecture level where AR System clients operate within the multitier system.

#### command-line option

A parameter used to specify how the AR System tools will run. (UNIX only)

#### component

See asset component.

#### **Computer Telephony Integration (CTI)**

Systems that enable a computer to act as a call center, accepting incoming calls and routing them to the appropriate device or person.

#### **Configuration Catalog**

A feature of Remedy Asset Management that stores your standard configurations (such as standard desktop, laptop, server, and so on) for management purposes.

#### **Configuration Item (CI)**

A component or asset that, along with other CIs, makes up a configuration.

#### **Configuration Management**

The management of configurations and their associated CIs.

#### **Configuration Manager**

A series of forms that enables your application administrator to populate the Remedy IT Service Management applications with information about users, locations, categorization, and business rules that are specific to your organization.

#### console

See Remedy Service Level Agreements Console, Remedy IT Service Management Console, or Remedy Asset Management Console.

#### **Consolidated Service Desk**

See call center.

#### container

The underlying data structure for guides and applications. A component of the AR System used to store collections of objects. Used as the basic storage structure for applications, active link guides, filter guides, and packing lists.

#### contingency planning

Planning which reduces the vulnerability of business by being able to maintain or preserve services.



#### control data type

The data type for fields that execute active links. These fields do not contain actual data.

#### control panel

A form that is used as a centralized entry point from which users choose the business tasks they want to accomplish.

#### core field

One of a set of basic fields common to all AR System forms. AR System administrators cannot remove these fields from a form.

#### cost center

An entity used to track cost information within an organization. See also *split cost center*.

#### cost management

Management of the costs associated with your organization.

#### cumulative performance

Refers to the performance of time-based SLAs (such as response time SLAs or resolution time SLAs) to determine how well the SLAs are performing over time.

#### cumulative performance target

Specifies the target (such as 98%) that you set to measure how often you will meet your SLAs commitment from effective date to expiration date.

#### currency code

The three-letter code that represents a currency type, such as **USD** for United States Dollars.

#### currency data type

The data type used for fields containing currency data. Currency data is stored in four parts: a decimal value, a currency code, a conversion date, and one or more functional (converted) currency values. Each part can be viewed or searched by users, or accessed by workflow. See also *allowable currency, functional currency, currency code.* 

#### **Customize group**

One of several special access control groups that the AR System provides. This group grants users the right to customize their form layout and to create custom commands (in UNIX) in AR System User Tool.

#### data field

A field that stores data in the database. Data fields include character, date/time, diary, integer, real, decimal, selection, and attachment.

#### data tier

The architecture level that contains data and communicates with the AR System server. The data can be stored in a text file, spreadsheet, or database internal or external to the AR System.

#### data type

The property of a field that determines what type of information the field contains. The choices are character, date/time, diary, integer, real, decimal, selection, trim, control, and attachment.

#### date data type

The data type used for fields containing date values. Date values are stored as the number of days from the beginning of the date field's range. Date values can range from January 1, 4713 B.C. to January 1, 9999 A.D. See also *date/time data type*.

#### date/time data type

The data type used for fields containing calendar dates and time values.

#### decimal data type

A field that accepts and contains fixed-point numbers. This type of field enables you to store quantitative information in a request.

#### declining balance depreciation

A method of calculating depreciation in which assets depreciate at a constant rate per year, accelerated by a factor of 150%. In this method of accelerated depreciation, 150 percent of the straight-line depreciation amount is taken the first year, and then that same percentage is applied to the undepreciated amount in subsequent years. See also *double-declining balance depreciation*.

#### default

An AR System administrator- or userdefined setting or value that automatically applies to a field if users do not supply a different setting or value when submitting a new request. See also *administrator default*, *user default*.

#### dependent change tasks

Change tasks that must be completed in a sequence as defined by the change supervisor.

#### deployed SLAs

In deployed mode, you can only modify limited fields of the SLA. You cannot change the terms and conditions or the goals that you have set up for the SLA. However, you can add milestones and associate actions to the milestone.

#### depreciation

A method to allocate the cost of an asset over its estimated useful life.

#### **Details pane**

In the AR System User Tool, the part of the main window that displays fields for entering data.

#### dialog box

A message displayed to users that must be responded to before users continue to fill out a form. The administrator creates a dialog box by using an active link action.

#### diary data type

The data type used for fields that enables you to capture a history of the actions taken for a request. The field stores character data. It is an append-only field, and each addition is stamped with the time, date, and name of the user who entered the item.

#### disabled SLA

In disabled mode, the SLA cannot be attached to any new requests. However, the SLA continues its measurements for requests already in progress.

#### display-only field

A temporary field for which no space is allocated in the database. See also *global field*.

#### display-only form

A type of form containing display-only fields. Display-only forms are used to create control panels and dialog boxes.

#### double-declining balance depreciation

A method of calculating depreciation in which assets depreciate at a constant rate per year, accelerated by a factor of 200%. In this method of accelerated depreciation, double the straight-line depreciation amount is taken the first year, and then that same percentage is applied to the undepreciated amount in subsequent years. See also *declining balance depreciation*.

#### down asset

An asset not currently working or is in repair.

#### downstream

Devices that are closer to the end nodes in a network (client machines or servers). See also *network topology* and *upstream*.

#### draft SLAs

The default status of an SLA. In draft mode, you can make changes to any fields on the SLA form. The SLA is functional and calculates measurements in draft mode, but is not ready for production.

#### dynamic menu

A menu that causes a search to be performed when a user selects the menu button. The results of the search are used to build the list of items from which the user can choose. See also *character menu*.

#### email engine

See AR System Email Engine.

#### entry

A row in the database that represents a request.



#### escalation

A workflow component that searches at specified times or at regular intervals for requests matching a specified condition and performs specified operations on all matching requests. They are generally used to find records that have exceeded desired business rules or processes and take appropriate action. Escalations run on the AR System server.

#### expired SLA

An SLA expires when the expiration date has passed. The system automatically marks the SLA as expired and it cannot be attached to any new requests. Once the SLA has expired, you can extend the expiration date and deploy it. You can modify actions for an expired SLA.

#### export

1) The AR System Administrator command that transfers definitions (for example, forms, filters, active links, and mail templates) in a file. 2) The ability to transfer one or more data entries to a file for archive or transfer by using the reporting feature in AR System User Tool. 3) The ability to copy SLAs to a file to be imported onto another server. See also *import*.

#### field

In the AR System, the main entity of a form. All of the following are AR System fields: data, table, page, active link control fields (buttons, menu items, and toolbar buttons), and trim.

#### field ID

A unique numeric identifier that is assigned to each field. Once assigned, it cannot be changed.

#### field label

A name supplied by the administrator that describes the field's purpose. Intended for display to the user.

#### field name

A unique character identifier that is assigned to each field. The name can be changed at any time as long as the new name is unique.

#### file menu

A menu with items retrieved from a file that contains a formatted character menu.

#### filter

Workflow that tests every server transaction for certain conditions and responds to the conditions by taking specific actions. AR System administrators can define many types of filters—filters that set fields to specified values, run independent system processes, send interactive messages to users, notify users when the state of requests change, or make entries in audit trail log files. Filters run on the server.

#### filter API

An AR System plug-in API that allows inline access during filter and escalation processing to extended servers.

#### filter guide

An ordered sequence of filters that together accomplish a specific operation. Filter guides can be used as a subroutine to accomplish common tasks.

#### fixed license

A license permanently assigned to a user, enabling access to the licensed features of the AR System at any time. See also *floating license*, *FTS license*, *write license*.

#### flashboard component

An individual area chart, bar chart, line chart, or meter that is placed upon a flashboard.

#### Flashboards

A real-time visual monitoring tool that shows you the state of your service operations, warns you about potential problems, and collects and displays trend data.

#### **Flashboards license**

A license that enables a user access to the Remedy Flashboards product. See also *fixed license*.

#### floating license

A license that exists on a server and that is temporarily allocated to any user who requests a license and who is defined in the User form as having a floating license type. If no floating license is available at the time of the user request, the user must wait until a license becomes available. See also *fixed license*, *FTS license*, *write license*.

#### form

A collection of fields that represents a record of information in the AR System. AR System administrators can define and change the fields and workflow associated with a form. An AR System application can include many forms.

#### form action field

One of a set of special fields that provide the standard functions of the web client interface. Some of these include submit, query, modify, and the advanced search bar.

#### form view

The screen layout for a form, which appears in the Details pane of AR System User Tool. AR System administrators can create and name multiple form views, which can be further modified by users with Customize permission. Administrators can include different fields and can hide fields in various form views.

#### FTS

See Full Text Search (FTS).

#### **FTS** license

A license that enables a user to perform a Full Text Search in any large text or diary field indexed for FTS. See also *fixed license*, *floating license*.

#### Full Text Search (FTS)

A feature that enables a user to search quickly for information in large text or diary fields. The fields must be indexed and enabled for FTS by the AR System administrator, and the user must have an FTS license.

#### function

A named procedure that performs a distinct service in the AR System. The AR System API has a set of function calls used to accomplish AR System tasks. Additionally, there are table functions that you can use to perform mathematical operations on table data.

# functional currency

An alternate currency type to which the value in a currency field is converted. Values for functional currencies are calculated based on currency conversion ratios maintained in a form on the server. Functional currency values are stored as part of the data in the currency field, and can be viewed or searched by users, or accessed by workflow. See also *currency data type, allowable currency*.

#### global field

A display-only field used in multiple forms. The value contained in the global field is duplicated across all forms that contain the field.

# graphical user interface (GUI)

A visual computer environment from which users can access programs and files through graphical representations on the screen, such as icons, menus, and dialog boxes.

#### group

A category in the AR System used to define user access to form fields and functions. The AR System defines several special groups: Public, Administrator, Subadministrator, Customize, Submitter, Assignee, Assignee Group, and Flashboards Administrator. You can define additional groups through the Group form. See also *access control*, *permission, user*.

# Group form

The form in which you add new groups, delete groups, and modify group permissions.

#### guest user

An unregistered user with a limited set of capabilities (submit requests and possibly review those requests). The administrator can specify whether unregistered users are allowed at your site.

# guide

See active link guide, filter guide.

# help desk

An IT service organization that responds to incidents and problems reported by customers, and provides the appropriate information and resolutions. See also *case* and *Remedy License*.

#### help desk request

See case.

### help desk manager

A person that monitors help desk cases, change requests and tasks to help them plan resources and to identify incident trends. The help desk manager also handles escalations and assignments, approves reassignments and change requests, and monitors day-to-day help desk activity.

#### help desk ticket

See case.

# hidden field

A field that exists but is not visible in a user's view of the form.

# import

1) The AR System Administrator command that transfers definitions from an export file to the current server. 2) The Remedy import command that transfers one or more data entries from an archive file to a form. 3) The ability to transfer SLAs from a file to a server. See also *export*.

#### incident

Any even that is not part of the standard operation of a service and that causes, or may cause, an interruption to or reduction in the quality of that service. See also *Problem Management*.

# Information Technology Infrastructure Library (ITIL)

A reference library organizations can use to improve the way they use IT.

### integer data type

The data type used for fields that contain numeric values between -2147483647 and 2147483647. The range for a field can be limited by the AR System administrator.

#### inventory

The quantity of assets available.

#### ISO currency code

See currency code.

#### ITIL

See Information Technology Infrastructure Library (ITIL).

#### IT director

A person responsible for technological direction and procurement strategy. Works with lines of business managers to determine future hardware and software requirements.

#### **IT Services applications**

See Remedy IT Service Management

#### join form

A type of form that contains information from two or more AR System forms. Although join forms function similar to regular AR System forms in most respects, they do not store independent data. Join forms point to the data stored on the two AR System forms that were used to create the join form.

#### keyword

A variable whose value is defined by the AR System. For example, **\$USER\$** represents the name of the user that is currently logged in. Keywords can be used in defining qualifications for searches, search menus, workflow, and macros; or for specifying a value in the Set Fields action for active links, filters, and escalations.

#### knowledge base

A repository that stores reusable solutions to customer product problems in an easyto-retrieve format.

#### known error

A condition identified by successful diagnosis of the root cause of a problem when it is confirmed that a configuration item is at fault.

#### legacy system

A system in which a company or organization has already invested considerable time and money.

#### license

See fixed license, floating license, FTS license, read license, write license.

#### Lifecycle Asset Management

Managing the life of an asset from its purchase, deployment, and disposal.

#### location

A configurable component composed of a region, a site, and a department. Locations are used by the auto-assignment functionality.

#### macro

A set of operations recorded for later execution. Macros are useful for automating frequently used or complex search operations.

### mail template

A template that enables you to submit a request by using electronic mail. The AR System administrator generates templates from an existing form by using the export command. See also *AR System Email Engine*.

#### main asset

An asset recorded in the database as a unique entry or one that includes associated components. For example, a computer workstation that consists of multiple components such as a monitor, keyboard, mouse, system chassis, and hard disk may be entered as one asset and called a workstation. It can also be entered as a main asset with a series of related components. See also *asset component*.

#### main form

A form that users interact with directly. An application may use more than one main form. Main forms are sometimes referred to as primary forms.

#### main window

In the AR System User Tool, a window that displays a form in the Details pane and, optionally, the results of a search in the Results pane and prompt text in the prompt bar.

# mapping

The parameters for a particular distributed operation, such as To and From servers and forms, data control issues, and field-to-field mapping definitions.

### mapping history

A history tracking record created when a distributed operation occurs. This record includes the date and time of transfer, source request ID, source form, source server, and the name of the specific mapping used.

#### measurement

The metric by which supervisors measure the ability of the support staff to meet their SLA commitments.

### menu item

A command accessed from a menu.

# mid tier

The architecture level consisting of add-in services that communicate between AR System servers and various clients. The AR System User Tool client can communicate directly with AR System servers. However, browser clients must use the mid-tier add-in services to communicate with AR System servers.

#### milestones

A set of actions that will trigger when you progress towards the SLA goal, to make sure that your SLA goals are being met.

# module

A distinct area of functionality within an application. The Remedy Help Desk application consists of three modules: Help Desk, Change Tasking, and Asset Inventory.

#### network topology

The physical (real) or logical (virtual) arrangements of assets in a network. See also *upstream*, *downstream*, and *peer-to-peer*.

#### Remedy Help Desk 5.5

#### notification

A message sent to a user via workflow. Notification can be in the form of an alert, email message, or other method using integrations.

#### operator

One of a number of functions that enable you to define advanced searches or build qualifications.

#### option group

See *selection data type*.

#### packing list

A set of associated server objects that can be viewed as a *work space* in the server window or used in external utilities.

#### page field

A type of field that groups related fields and includes tabs to label those groups.

#### page holder field

A field that contains one or more **page fields** and allows these grouped fields to be displayed one set at a time in a given area of the screen.

#### Parent/Child contract

A parent, or main, contract that has other children, or subcontracts, associated with it.

#### peer tasks

Dependent change tasks that can be completed simultaneously. See also *dependent change tasks*.

#### peer-to-peer

Devices that are on the same level in an organization's network (for example, two workstations). See also *network topology*.

#### permission

The property setting that enables AR System administrators to control who can view and change individual fields of a form. Administrators also set permissions for forms and active links. Permissions are defined for each access control group. See also *access control*, *group*, *user*.

#### plug-in

An auxiliary program that works with the AR System server to enhance its capability. A plug-in is a dynamically linked library (DLL) on Microsoft platforms and a shared object on UNIX platforms. The plug-in service loads the plug-in at runtime.

#### plug-in service

A server that loads plug-ins. The plug-in service is a companion server to the AR System server that loads the ARDBC, AREA, or filter API plug-ins at runtime.

#### preference server

An AR System server that stores user preferences centrally in one or more preference forms.

#### **Problem Management**

The process of identifying, diagnosing, and recording the root causes of incidents to prevent problems from reoccurring.

#### prompt bar

In the AR System User Tool, the part of a main window that displays instructions or relevant information to the user.

#### property

An attribute that is defined. For example, the properties of a field include its data type, physical characteristics (such as length), and whether it is required or optional.

# Public group

An access control group that the AR System provides. Every user is automatically a member of this group.

# push fields

An advanced action that allows you to push information from the "Applies To" form for which you are creating the SLA to another form on the same server.

# qualification

A search criteria including field references, values, and arithmetical and relational operators used to find a set of data that matches the conditions specified.

# query-by-example

A method for describing a database search visually. An empty form is displayed and the search conditions are typed in or selected in their respective fields. The AR System turns the visual query into the proper command language, such as SQL, necessary to interrogate the database.

# range

The upper and lower limits of acceptable values. For example, if an integer field's range is -10 to 100, users can enter any integer from negative 10 to positive 100 inclusive.

# read license

A license that allows a user to search the AR System forms and to submit new requests but does not allow the user to modify existing requests. See also *write license*.

# real data type

The data type used for fields that contain floating-point numbers. The range and precision can be set by the AR System administrator.

# reconciliation

A feature in Remedy Asset Management that checks for duplicate asset records and enables the user to delete one and keep the other.

# related workflow

Workflow objects that are related to a field.

# recurring review period

A time period for SLAs that is used to measure data collected over a smaller period of time than what the cumulative performance is measuring.

# **Remedy Administrator**

See AR System Administrator.

# **Remedy Asset Management Console**

The main interface for the Remedy Asset Management application. The console works like a control panel from which users can perform their primary tasks.

# **Remedy License**

See AR System License.

# **Remedy Mail Server**

See AR System Email Engine.

# **Remedy IT Service Management Console**

The main interface for the Remedy Help Desk and Remedy Change Management applications. The console works like a control panel from which users can perform their primary tasks. The console contains separate features for each of the roles defined in the applications.

#### **Remedy IT Service Management**

Remedy applications that focus on the expanded activities of the Information Technology organization. For example, Remedy Help Desk, Remedy Asset Management, Remedy Change Management, and Remedy Service Level Agreements are all Remedy IT Service Management applications.

#### **Remedy Service Level Agreements Console**

The main interface for the Remedy Service Level Agreements application. The console works like a control panel from which users can perform their primary tasks, such as creating, viewing, and managing SLAs, configuring the application for userdefined forms, and generating reports.

#### report format

The layout that users specify when generating a report from an AR System search. Users can choose the fields to print and the format of the report.

#### request

A collection of information that describes an event (transaction), such as a problem or a service request.

#### request ID

A unique numeric identifier for each request that is generated by the AR System in the Request ID field.

#### requester

An internal or external customer who contacts the help desk via telephone, email, or web about an incident or a problem.



#### **Request for Change**

A form, screen, or web page used to record details of a request for a Change to any Configuration Item within an infrastructure or to procedures and items associated with the infrastructure.

#### **Request ID field**

A core field on a form that contains the unique numeric identifier for a request or entry in the AR System. In join form entries, the Request ID field contains the Request ID field contents for each of the underlying forms, separated by a vertical bar. Previously called an entry ID.

#### reserved field

One of a set of fields with specific rules and interpretations that are defined by the AR System.

#### resolution

The agreed upon solution to a help desk incident or problem. See also *case* and *incident*.

#### results list

1) A list of requests that match a search. 2) An AR System server object for displaying search results that can be added to forms and views. Multiple rows in the results list that meet specified criteria can be selected for further processing.

#### **Results pane**

In the AR System User Tool, the part of the form window that displays the results of a search.

#### **Return on Investment (ROI)**

The expected monetary return on something someone has invested their time and money in.

#### role

The Remedy IT Service Management applications are based on user roles. Depending on your role in the organization—requester, support, management—you will work with a different application (or view) on your desktop.

Also, a group of approvers, typically representing a job function or responsibility.

#### root cause

The underlying cause of an IT-related problem experienced by a customer.

#### salvage value

The estimated value that an asset will realize at the end of its useful life. See also *useful life*.

#### search

The process in which users display a subset of requests according to search criteria that users define.

#### search menu

A menu list with items that are retrieved from fields in a specified form.

#### Section 508

A law that requires the government to purchase software that is accessible and usable by people with disabilities (visual, motor, and auditory impairments). Three basic criteria for compliance are:

Can the tasks of this application be performed without using a mouse?

Can the tasks of this application be performed with a monitor turned off, and while using a screen reader?

Can the tasks of this application be performed with the computer's speakers turned off?

#### selection data type

The data type used for fields with a set of mutually exclusive choices. The selections are displayed as option buttons or as a list of items.

#### selection list

A list that appears when an active link performs a search that returns more than one request.

#### server

See AR System server.

#### server tier

The architecture level consisting of the AR System server that controls access to the data and any supporting services called by or used by the AR System server.

#### service catalog

A method of identifying a category of service in connection with a request. The service catalog for an application is typically configured by the application administrator.

#### service level agreement (SLA)

A contract that determines the level of service that a customer can expect from a service provider.

#### service level management (SLM)

Managing the quality of IT services in the face of changing needs and demands. The goal of service level management is to set up and maintain service level agreements (SLAs) between service providers and customers.

#### set fields

An advanced action that allows you to pull information from other forms to be set in the form for which you are creating the SLA.

#### shared components

Workflow installed as part of all of the Remedy applications and shared among other installed Remedy applications.

#### solutions database

See knowledge base.

#### source control

Managing server objects in AR System application development by controlling object access.

#### split cost center

A cost centers that enables a department to split its costs with other departments. For example, a project management group might splits its costs with an engineering department and a sales department. The project management department would be a split cost center, and the engineering department and sales department would be target cost centers.

#### SQL menu

A menu list that pulls values from a database table by using a direct SQL command.

#### status bar

The part of a main window in an AR System client that displays instructions or relevant information to the user.

#### Status field

The core field in which the AR System tracks the various stages of the resolution process for a request.

#### status history

Information that shows what progress has been made on a request. Users can view status history from the Details pane when in modify mode in AR System User Tool.

#### straight-line depreciation

A method of calculating depreciation in which assets depreciate at a constant value per year. The annual depreciation is calculated by subtracting the salvage value of the asset from the purchase price, and then dividing this number by the estimated useful life of the asset.

### subadministrator

An individual with limited administrative access to the AR System as defined by an administrator.

#### Subadministrator group

One of several special access control groups that the AR System provides. Members of this group have limited administrative access to the AR System as defined by an administrator.

#### submitter

A person who reports a problem, makes a request, or enters information into a database. See also *case*, *request*, *change request*.

#### Submitter group

One of several special access control groups that the AR System provides. Users automatically belong to this implicit group for requests they have submitted. See also *Assignee group, Assignee Group group.* 

#### sum-of-the-year's digits depreciation

A method of calculating depreciation in which assets lose more of their value early in their lifetime. This method of calculating depreciation of an asset assumes higher depreciation charges and greater tax benefits in the early years of an asset's life.

#### support case

See case.



#### support technician

A person who is responsible for, or assists with, the processing of a request. A support technician may serve in either a frontline capacity, which typically involves the initial reporting of a request, or in a backline capacity, which typically involves more detailed investigation and resolution of the request.

#### table field

Fields that display data from other requests within the context of the current request. The data appears in a spreadsheet-style format.

#### task

A shortcut or link created in AR System User Tool that enables users to quickly open a specific form, search, application, or active link guide.

This is different from a change task in the Change Management application or in the Change Tasking module of the Help Desk application.

# тсо

See Total Cost of Ownership (TCO).

#### terms and conditions

The conditions, or contract, under which the SLA is in effect.

#### time-based SLAs

Measures the time taken, for example, to resolve a Help Desk ticket from the time the ticket was submitted to the time it was resolved. Any time that falls within the "Exclude when" qualification is ignored and not measured.

#### time data type

The data type used for fields containing time values. Time values are stored as the number of seconds from 12:00:00 a.m. See also *date/time data type*.

#### toolbar

In the AR System User Tool, the row of buttons below the menu bar that enables easy access to commonly used menu commands.

#### toolbar button

In the AR System User Tool, an icon for a menu item that triggers an active link. See also *button*, *menu item*.

#### Total Cost of Ownership (TCO)

A term to describe all the costs involved in owning an asset or assets.

#### trim

Lines, boxes, text, and URL links used to enhance the usability and appearance of a form.

#### trim data type

The data type of fields that enhance a form's usability and appearance. Trim includes lines, boxes, URL links, and text. These fields do not contain data.

#### upstream

Devices that are typically closer to the network backbone (client machines or servers). See also *network topology* and *downstream*.

#### useful life

The number of years that a depreciable asset is expected to be in use.

#### user

Any person with permission to access the AR System. See also *access control, group, permission*.

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#### user default

A value or set of values that a user can predefine. A user default overrides an AR System administrator default. See also *administrator default*.

#### User form

The form in which administrators add users to the AR System and specify the type of access each will have.

#### user interface (UI)

The junction between a user and a computer program. An interface is a set of commands or menus through which a user communicates with a program. A command-driven interface is one in which you enter commands. A menu-driven interface is one in which you select command choices from various menus displayed on the screen. See also *graphical user interface (GUI)*.

#### variable

A data element that changes according to the conditions.

#### vendor form

Forms that allow users to connect to external data sources, such as text or spreadsheet data, that reside on local or remote servers.

#### verification reports

A series of reports confirming that someone is assigned to all change requests, change tasks, and help desk cases.

#### view

See form view.

#### view field

Field that provides a browser window within a form. Can be used to display a URL, the contents of an attachment, or direct HTML text.



#### view form

A form that allows users to connect to external database tables accessible by the AR System database user.

#### view layout

The location of fields in a user view.

#### view user interface (VUI)

A structure that contains information about a single view.

#### web client

An AR System client that runs in a web browser to provide a user interface to AR System applications.

#### Web Service

A programmatic interface that enables messages to be sent to and received from an application over a network (Internet or intranet), using standard Internet technologies. It uses a combination of platform-independent protocols such as Extensible Markup Language (XML), Web Services Description Language (WSDL), and Simple Object Access Protocol (SOAP).

#### Web Service Description Language (WSDL)

An XML-based language used to define web services and how to access them.

#### wildcard

A character that users can enter to represent other characters in a search. For example, in search statements in character and diary fields, users can specify wildcards to match single characters, strings, or characters within a range or set.

#### workflow

1) A set of business processes used to run a company. 2) The automation of business processes through actions performed by active links, filters, and escalations.



## work space

A subset of all objects on the server displayed in AR System Administrator. This subset of server objects is defined in a packing list.

#### write license

A license that allows a user to modify and save data in existing requests as field and form permission settings allow. See also *fixed license, floating license, read license.* 

# XML Schema or XML Schema Definition (XSD)

Provides a means for defining the structure, content, and semantics of XML documents.

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