**Ticket Toolbox – Campus Remedy Edition**

August, 2019

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**This version of the Ticket Toolbox is written for Cornell non-CIT use.** Campus units may modify it to meet their needs. An updated version will be released in advance of the move from Remedy to TeamDynamix in April 2020.

Expectations

General

Open Incidents should either be actively worked until they are completed, or reviewed daily until they are either resolved / closed or reclassified.

All tickets should be maintained as follows:

1. Tickets should have the correct classifications (initial classifications will be made by Level 1)
2. Tickets should be assigned the correct status and impact
3. For tickets that can / should be handled through documentation and/or at Level 1, work with the Service Desk to shift the responsibility

Frequency of customer contact and Remedy updates (incidents)

Automated response will say that the initial response for incidents and work orders will be within 1 business day (Remedy). This may change as TeamDynamix is implemented.

With each interaction, customers should be provided with an expectation of when they will receive the next update on the ticket.

Use of external tools (Jira, Trello, Pinnacle) with Remedy

Remedy information and communications should be in alignment with the SLA for the request. (Talk with your division leadership for SLA information.) All Remedy tickets should be maintained as described under “General”.

For the most part, items that are being handled via external tools are not Incidents, and should be reclassified. See Hard-to-Handle Cases / “It’s classified wrong”.

Common fields and their definitions

Classification

Incident  
An Incident is an unplanned interruption to an IT Service or a reduction in the Quality of an IT Service. Failure of a Configuration Item (i.e. an Asset) that has not yet impacted one or more Services is also an Incident.

An Incident focuses on getting users up and running after disruptions. (compare to a Problem, a Work Order / Service Request, and a Project). The incident can be resolved with a workaround.

Incident examples:

* Remedy is slow to respond
* A user’s computer is not backing up correctly
* Failure of one disk from a mirror set

At this point in time, most tickets are being recorded in Remedy as Incidents (they are assigned a number that begins with INC). We will be getting away from this practice as we move to TDX, and are providing workarounds for this while we’re still in Remedy (see “It’s Classified Wrong” under Hard-to-Handle Cases, below).

Problem  
A Problem is a cause of one or more Incidents. The cause is not usually known at the time a Problem Record is created, and the Problem Management process is responsible for further investigation.

That’s the official ITIL definition. What it doesn’t say, though, is that we don’t have to have an Incident related to a Problem before a Problem ticket is created.

In Remedy, many of our Problems have been classified as Incidents, but the Incidents have not been combined so that the problem can be handled holistically.

At this point in time, there is no Remedy process in place for Problem Management (which is essentially doing a root cause analysis – often involving multiple teams – and taking steps to prevent the problem from recurring.) This will change as we move to TDX.

Problem Examples:

* Several users report that they are unable to access WiFi in a particular building
* A Service Manager notices that their application is not responding

Work Order / Service Request   
A Work Order (Remedy), or Service Request (TDX), is a request from a user for information, or advice, or for access to an IT service.

Work Order / Service Request Examples:

* A user requests a set of Duo codes
* A user asks whether they will have access to email when they leave Cornell
* A telecom coordinator requests a new phone for a user

Project   
A project represents a substantial change that will require a significant amount of work. If it’s a project, it probably shouldn’t be in Remedy (but many of the Remedy Incidents that we have accumulated are actually projects.) It’s up to your management to determine whether to keep these tickets in Remedy or to store the information elsewhere.

Status

New  
The incident has been received but has not assigned it to an individual.

Assigned   
The incident has been assigned to either a work group or an individual.

In Progress   
The incident has been assigned to a person but it has not been resolved. The person assigned is actively working with the user to diagnose and resolve the incident.

Pending   
The incident requires some information or response from the user or from a third party (e.g. vendor).

Resolved   
The customer has confirmed, or has been notified, that the incident is resolved.  
*For most Remedy queues, when a ticket’s status is saved as “Resolved,” an automated message is sent to the customer indicating that the incident has been resolved. This message includes a copy of the information in the "Resolution" field.*

Closed   
No further actions can be taken on the ticket.   
*No email is sent to the customer. Remedy automatically sets resolved tickets to the “Closed" status after 15 calendar days. Closed tickets cannot be reopened or reworked unless Remedy administration personnel provides special permissions for an individual to open closed tickets.*

#### Cancelled

Use this status for requests by the customer to cancel a ticket before any work is done, or for illegitimate tickets. For example, tickets where the incident is not a real support request (e.g. spam email), or where duplicate tickets have been created (e.g. same customer sent multiple messages regarding the same incident).

Impact

Effect that the incident, change, problem is having or will have to University/Business operations. Example: A measure of how many people are affected by the incident. The values are:

#### Extensive/Widespread

The reported incident is affecting a majority of campus users.

#### Significant/Large

The reported incident is affecting, or has the potential to affect, a large cross-section of campus users, or all users of a particular group (e.g. everyone in a particular building).

#### Moderate/Limited

The reported incident is affecting, or has the potential to affect, a moderate number of people. This is the default impact level for tickets created in Remedy Classic, and for customer submissions in MyIT, unless changed.

#### Minor/Localized

The reported incident is affecting a single user or a small handful of users. This is the default impact level for tickets created in Remedy with Smart IT unless changed.

Urgency

This is a numeric value expressing the importance from the requestor/customer’s perspective. (1­ Critical; 2­ High; 3­ Medium; 4­ Low) that is a measure of the required timeliness of resolution. The values are:

#### Critical

An immediate need that is preventing the customer from performing core business duties. The customer is "dead in the water" until the incident can be resolved.

#### High

A pressing need that significantly impedes the customer's ability to perform core business duties, or resolution is otherwise needed within one business day.

#### Medium

A need that impedes the user's ability to perform a specific task, and requires resolution within three business days. This is the default urgency level for tickets created in Remedy Classic, and for customer submissions in MyIT, unless changed.

#### Low

The need has a minor impact on the customer's work, or will not require a resolution before three business days. This is the default urgency level for tickets created in Remedy with Smart IT unless changed.

Priority

## 

This is a value (Critical; High; Medium; Low) automatically set by Remedy based on Impact and Urgency field values, or by the customer’s MyIT selections. Priority levels indicate the relative importance of incidents being addressed in Remedy tickets.

Hard-to-Handle Cases

Incident occurred, resolved without intervention, waiting to see if it happens again

1. Change the ticket Status to “Pending”
2. Change the Status Reason to “Monitoring Incident”
3. Follow up with the customer in 10 business days to see if the issue recurred
   1. If yes – change the Status Reason to “In Progress,” while actively communicating with the customer. (See “Waiting for customer response” for customer communication procedures)
   2. If no - follow up a second time with the customer in 10 business days to see if the issue recurred
      1. If yes – change the Status Reason to “In Progress,” while actively communicating with the customer. Afterwards, see “Waiting for customer response” for customer communication procedures during an active ticket.
      2. If no – change the Status to “Resolved” and the Status Reason to “Monitoring Incident”. Make sure to enter a note in the Resolution field asking the customer to reply if the issue occurs again (see “Customer Follow-Up – Waiting for Incident Recurrence” for customer communication).

Waiting for customer response

1. Change the ticket status to “Pending”
2. Change the Status Reason to “Client Action Required”
3. After 3 business days, follow up with the customer. See Appendix A for sample text – “Customer Follow Up, First Occurrence”
4. After another 3 business days, send a second reminder to the customer. See Appendix A for sample text – “Customer Follow Up, Second Occurrence”
5. After a third round of 3 business days, if you have not heard from the client, send one final follow-up email message letting the customer know you’ll be resolving the ticket. See Appendix A for sample text – “Customer Follow Up, Third and Final Occurrence”
6. Set the ticket Status to “Resolved” and the Status Reason to “Customer Follow-Up Required”. In the resolution field, enter:  
   There were no additional updates or requests for service after multiple follow-ups.

It's classified wrong

If it’s an Incident -

* 1. If it should be a Problem as defined by ITIL / ITSM, and a workaround has been found for the customer:  
     \*As noted above, there is currently no Remedy process in place for Problems.\*
     1. If the issue is due to a known issue or bug:
        1. Resolve the incident
        2. Set Status Reason to Future Enhancement
        3. Create a Work Detail entry indicating that this Incident occurred because of a known issue or bug
        4. Optional: Use SmartIT (<https://cornell-smartit.onbmc.com/>) to record this as a Known Error (<https://www.youtube.com/watch?v=2_UN1DA0MXg>)
     2. If the issue requires a root cause analysis along with additional work to fix, choose one of the following two options:
        1. Record the information in another system and resolve the ticket.   
           Or
        2. Enter [Problem] in at the very beginning of the ticket’s Summary
  2. If it should be a Work Order:

Use brackets with [Work Request] in front of the Summary and change the Incident Type to “User Service Request”  
\*note: regular incident-incidents should be designated in the Incident Type as “User Service Restoration”

* 1. If it should be a Project:
     1. Options, to be chosen by your manager:
        1. Record the information in another system and resolve the ticket. In many cases, the customer will need visibility into the list of pending projects. Or
        2. Enter [Project] in at the very beginning of the ticket’s Summary

I believe my group needs to work with another group (internal or in CIT) to make this happen

1. Determine which group needs to take lead (or who will take lead if the responsibilities are about equal)
2. Assign the ticket accordingly with an internal note indicating who’s on point for the other team(s)
3. If necessary, escalate through your manager, all the way up to your director if need be.

We don't provide that level of support

1. Work with your manager to determine how to proceed. Sample language can be found in Appendix A, “Unable to Support”

Waiting for vendor

1. Change the ticket status to “Pending”
2. Change the Status Reason to “Third Party Vendor Action Required”
3. Update the customer on any business day that the vendor has provided you with one or more updates. See Appendix A for sample text – “Waiting On Vendor – Vendor Provided Update”
4. Unless the vendor has given you a specific timeline for an update (and you have relayed that timeline to the customer), if you have not received an update from the vendor in 3 business days, request an update from the vendor and relay any results to the customer.

For example, if the vendor has indicated that they will provide updates in two weeks, relay that timeline to the customer, and you do not need to follow up in three business days.   
If that specified day passes though, request an update from the vendor, and relay any results to the customer.

1. If the vendor does not respond to your update request within one business day, relay that information to the customer. See Appendix A for sample text – “Waiting On Vendor – Cornell Requested Update – No Vendor Response”
2. Repeat steps three and four until the customer’s request is resolved, or until the customer requests a different follow up schedule/requests the ticket be resolved

It’s been over a week, and I don’t have new news (and it’s not vendor-related)

1. Add new Work Info with specifics why there’s no new news (this is separate from the next step’s customer update)
2. Update the customer (unless the customer has specifically asked you to stop updating until there is new news). See Appendix A for sample text – “No New News”

It's low priority compared to my other work

1. Work with your manager to determine how to proceed.

Other Issues

### Assignment to CIT

When an Incident needs to be addressed by CIT, the ticket should be transferred to Cornell University IT > CIT – Support > Service Desk (L2). Please do not transfer it to any CIT group or CIT staff member other than the Level 2 Help Desk, unless that group or person has explicitly asked you to do so.

You may also email CIT Level 2 support at [tsphelp@cornell.edu](mailto:tsphelp@cornell.edu) - this email will create a new Incident that’s assigned to Service Desk Level 2 - or call the TSP line at 255-8690.

### Customer interactions outside of Remedy

As tickets are worked, interactions with customers should be recorded in Remedy regardless of whether they are handled using email or another medium (e.g. phone). This way, another person can pick up the ticket (if necessary) and understand where it stands.

### This type of incident could / should be handled by CIT

Contact Keyan Williams (ktw37) with the CIT Service Desk to ensure that CIT has the information needed to respond to the ticket.

Appendix A: Sample Text

Customer Follow-Up – First Occurrence

Good morning/afternoon/evening [CUSTOMER},   
  
I’m following up on this service ticket regarding [ISSUE]. .  
  
I'd like to find out if you are continuing to experience this issue, and see if you'd like any further assistance.  
  
Please let me know.

Thank you.  
  
Sincerely,  
  
[SIGNATURE]

Customer Follow-Up – Second Occurrence

Good morning/afternoon/evening [CUSTOMER],

I’m following up once more on this service ticket regarding [ISSUE].

I'd like to find out how matters have progressed on this issue, and see if you'd like any further assistance.

Please let me know.

Thank you.

Sincerely,

[SIGNATURE]

Customer Follow-Up – Third and Final Occurrence

Good morning/afternoon/evening [CUSTOMER},   
  
I’m following up once more on this service ticket regarding [ISSUE].

Since there haven’t been any updates or further requests for service on this matter, I'll be resolving this service ticket, but it will stay open for two weeks. Should anything change, please feel free to contact me and I’ll be happy to help further.

Thank you again for contacting [GROUP NAME].

Sincerely,

[SIGNATURE]

Customer Follow-Up – Waiting for Incident Recurrence

Good morning/afternoon/evening [CUSTOMER},   
  
I’m following up once more on this service ticket regarding [ISSUE].

Since I haven’t heard from you indicating that [ISSUE] has recurred, I'll be resolving this service ticket, but it will stay open for two weeks. Should anything change, please feel free to contact me and I’ll be happy to help further.

Thank you again for contacting [GROUP NAME].

Sincerely,

[SIGNATURE]

Unable to support

Good morning/afternoon/evening [CUSTOMER},   
  
This is regarding your request [CUSTOMER REQUEST]. Unfortunately, we do not have any official technical support or documentation for this situation.   
  
Even so, I can provide some external documentation and contact information that I’ve located for [INDIVIDUAL OR ORGANIZATION] that may be able to help out. Please be aware that the following links and information are not related to Cornell in any way, but they may be useful in identifying support options.

If you feel that this is something that we should support, please <fill out a Statement of Need>

[INSERT LINKS HERE]

Once again, I apologize for any inconvenience, but I hope the information I’ve provided above helps out.   
  
Thank you for contacting us.

[SIGNATURE]

Waiting on Vendor – Vendor Provided Update

Good morning/afternoon/evening [CUSTOMER],   
  
I’m following up on this service ticket regarding [ISSUE].  
  
We’ve received an update from [VENDOR NAME], and they’ve indicated [INFO APPROPRIATE FOR CUSTOMER].  
  
I hope this information is helpful, but please let me know if you have any questions or concerns.

Thank you.  
  
Sincerely,   
  
[SIGNATURE]

Waiting on Vendor – Cornell Requested Update – No Vendor Response

Good morning/afternoon/evening [CUSTOMER],   
  
I’m following up on this service ticket regarding [ISSUE].  
  
Because we hadn’t heard from [VENDOR NAME] in [NUMBER OF BUSINESS DAYS] business days, we reached out to [VENDOR NAME] to request an update. Unfortunately, we have not received an update yet, but we will request again if we don’t hear anything in a few days.

If we receive any updates in the meantime, we’ll be sure to relay that information to you as soon as possible.

I hope this information is helpful, but please let me know if you have any questions or concerns.

Thank you.  
  
Sincerely,   
  
[SIGNATURE]

No New News

Good morning/afternoon/evening [CUSTOMER],   
  
I’m following up on this service ticket regarding [ISSUE].  
  
Unfortunately, we’re still in the same situation that we were before, but I just wanted to touch base to let you know that we’re still working towards a resolution for you. As a refresher, here’s where things stand:

[WHY NO NEW NEWS]

If anything changes, we’ll be sure to update you as soon as possible. Otherwise, we’ll continue to touch base again in about a week to keep you informed.

If you’d prefer a different follow up time frame, please let me know.

Thank you.  
  
Sincerely,   
  
[SIGNATURE]