
Remedy
Smart IT Work Order
User Basics



December 2016

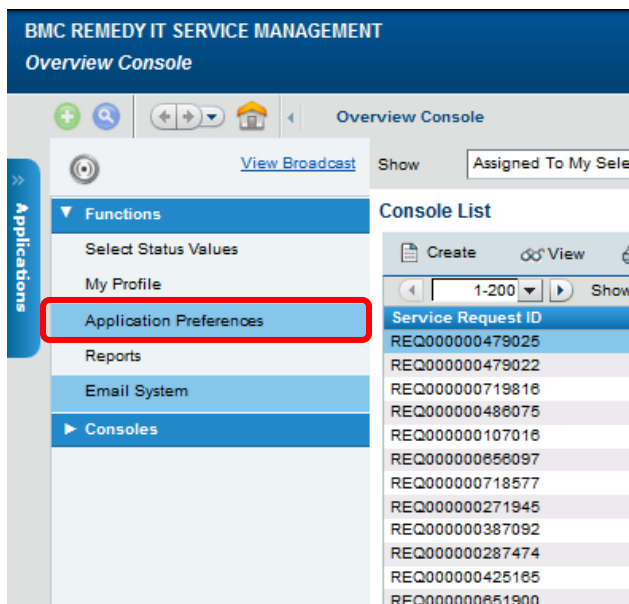
Viewing Work Order Management

The Overview console view allows users to respond, manage, or track individual or group work assignments from a variety of sources. For example, either you or the group you manage might receive work assignments from Word Order Management, Incident Management, Problem Management, and Change Management. From the Overview console, you can quickly get information about all your work assignments and perform the procedures that you use most often.

Accessing the Overview Console

When you first log in to Remedy, the default view is to show you the “**Overview Console**”. If you’re using multiple Remedy modules this is the view, we would recommend. If your not seeing the Overview Console you can update your defaults by:

1. Going to your main console view
2. Clicking on the **Application Preferences** link (left hand menus)



When you click on the Application Preferences link another window will pop open. On this window make sure you have the following fields filled out

The screenshot shows the 'Application Preferences' window for user 'go88'. The 'Default Home Page' is set to 'Overview Console'. The 'Work Order Management' tab is selected, and the 'Show Work Order' field is set to 'Yes'. Other settings include 'Company' as 'Cornell University' and 'Confirm On Submit' as 'No'. The 'Console Page' section shows 'Main table' as 'WorkOrder' and 'After New Save' as 'New Request After Subr'. The 'Overview Console' section shows 'Work Order Role', 'Work Order Type', and 'Work Order Status' as dropdown menus.

3. Default Home Page should say **Overview Console**
4. On the work Order Management tab also make sure that the **Show Work Order** field is set to **Yes**
5. Click **Save**

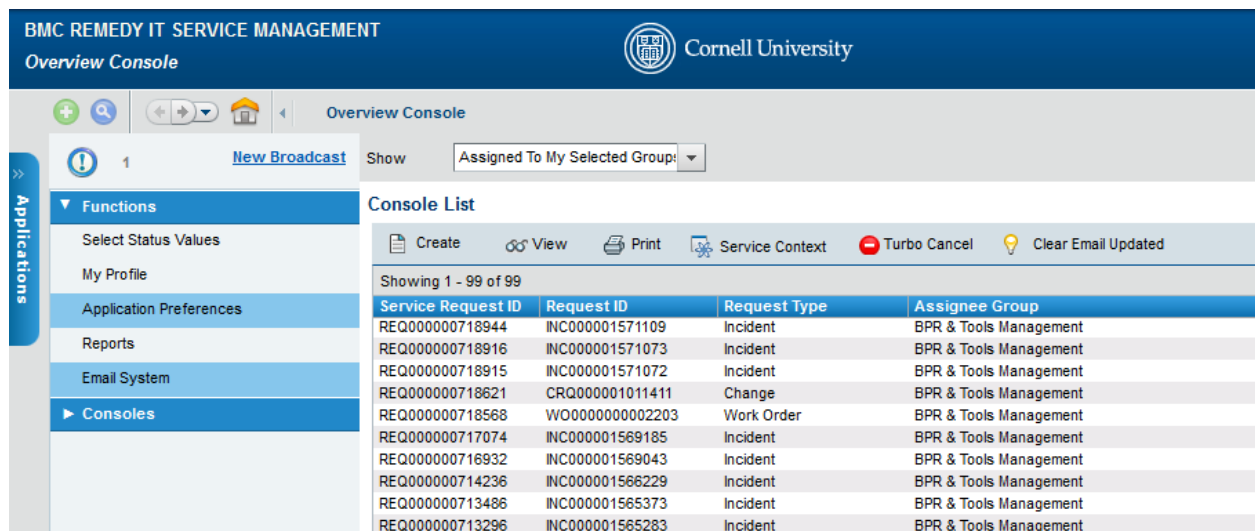
Now your default home page will be set to the Overview Console and you will be able to see Work Orders in that view.

Work Order Management

A **Work Order** is an order received by an organization from a customer or client, or an order created internally within the organization.

At Cornell, we use work orders to request services or products whereas Incident Management is designed to deal with issues that need to be restored to normal functions.

If you're working with multiple modules in Remedy (Incident, Work Order, Change, etc) then your default console view should be the **Overview Console**. In the Overview Console you can see any types of work requests:



BMC REMEDY IT SERVICE MANAGEMENT
Overview Console

Cornell University

Overview Console

New Broadcast Show Assigned To My Selected Group

Applications

- Functions
 - Select Status Values
 - My Profile
 - Application Preferences
 - Reports
 - Email System
 - Consoles

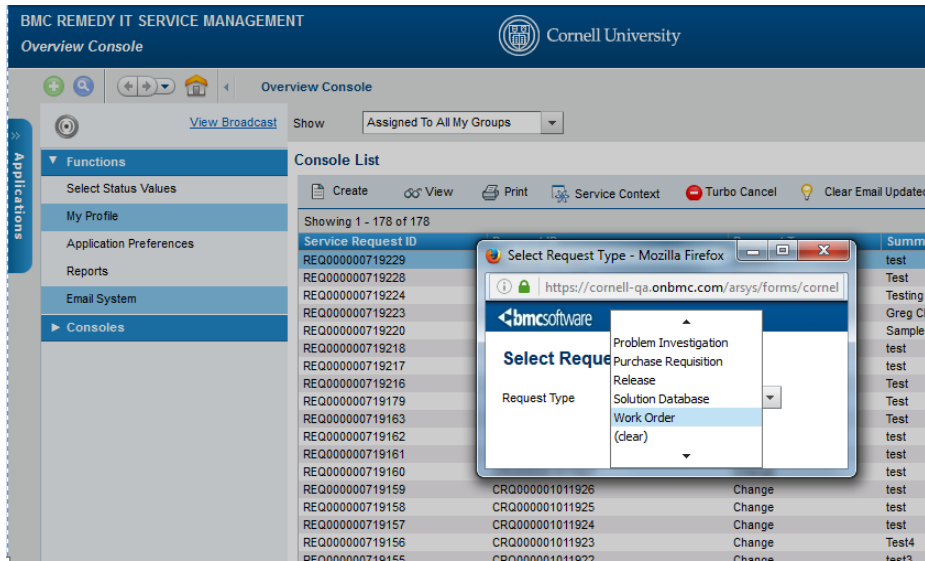
Console List

Create View Print Service Context Turbo Cancel Clear Email Updated

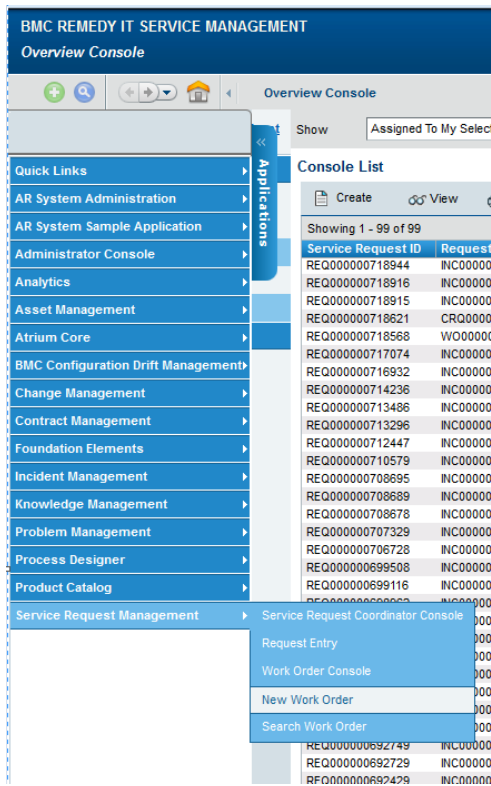
Showing 1 - 99 of 99

Service Request ID	Request ID	Request Type	Assignee Group
REQ000000718944	INC000001571109	Incident	BPR & Tools Management
REQ000000718916	INC000001571073	Incident	BPR & Tools Management
REQ000000718915	INC000001571072	Incident	BPR & Tools Management
REQ000000718621	CRQ000001011411	Change	BPR & Tools Management
REQ000000718568	WO0000000002203	Work Order	BPR & Tools Management
REQ000000717074	INC000001569185	Incident	BPR & Tools Management
REQ000000716932	INC000001569043	Incident	BPR & Tools Management
REQ000000714236	INC000001566229	Incident	BPR & Tools Management
REQ000000713486	INC000001565373	Incident	BPR & Tools Management
REQ000000713296	INC000001565283	Incident	BPR & Tools Management

If you would like to create a Work Order from the Overview Console you would click on **Create** and then select **Work Order**.



If you would like to access the **Work Order** console you can do that by going to **Applications->Service Request Management ->Work Order Console**



Creating a work order without a template

The screenshot shows the BMC Remedy IT Service Management interface for creating a new work order. The page title is "Work Order" and the breadcrumb trail is "Overview Console > WO0000000010603 (New)". The interface is divided into several sections:

- Quick Action:** Includes "Assign to Me", "Auto Assign", and "Create Relationship to".
- Functions:** Includes "Email System", "Paging System", and "View Audit Log".
- Work Order ID+:** Set to "WO0000000010603".
- Company+:** Empty field.
- Customer+:** Search field with "<Search using Corporate ID>" placeholder.
- Contact+:** Search field with "<Search using Corporate ID>" placeholder.
- Notes:** Empty text area.
- Template+:** Empty field.
- Summary+:** Empty text area.
- Service:** Empty dropdown menu.
- Work Order Type+:** Set to "General".
- Request Manager:** Includes "Support Group Name*", "Request Manager", "Request Assignee", "Support Group Name", and "Request Assignee" fields.
- Status*:** Set to "Assigned".
- Status Reason:** Empty dropdown menu.
- Priority:** Set to "Low".
- Vendor Group:** Empty dropdown menu.
- Vendor Ticket Number:** Empty text field.
- Work Detail:** Includes tabs for "Categorization", "Tasks", "Relationships", "Details", "Details 2", and "Dates/System". A search bar shows "0 entries returned - 0 entries matched".
- Add Work Info:** Includes "Notes" (with placeholder "<Type your work info here>"), "Attachment" (with placeholder "<File Name>"), and "More Details" section with an "Add" button.

The following procedure describes the basic steps for creating a work order in the Best Practice view.

1. From the **Overview Console**, choose **Create > Work Order**
2. On the new Work Order form, select the customer and type in their NetID and hit enter to search. Create customer records if there is no NetID
3. (Optional) Enter your contact's name in the **Contact** field.
4. In the **Summary** field, enter a brief description.
5. (Optional) In the **Notes** field, enter the work order details.
6. In the **Service** field click on the pull down menu to select the general service that is appropriate for the request.
7. In the **Work Order Type** field, enter a type (for example, General or Project).
 - a. You can classify work orders as **General** or **Project**, depending on the needs of your organization. This classification allows you to narrow the scope of work orders shown in the Work Order Console by using **Filter By > Defined Searches > Work Order Type**, or by setting an Application

Preference. For example, you can set a filter to show only Project work orders, and then clear the filter to show all. If you set a preference for Project work orders, then you only see Project work orders every time you open the Work Order Console.

8. In the Request Manager section, select values for **Support Group Name** and **Request Manager**. You do not need to enter values if the assignments are already set unless you want to change them and you have the permissions to do so. See [Assigning work orders manually](#).
9. In the **Status** field use this value to select the status of the customer's request.
10. The **Status Reason** value is used to determine
11. Select the **Priority** to identify the importance you (as support staff) assign to the work order.
12. *(Optional)* From the Vendor Group menu, select the vendor.
If the vendor's ticket number is available, type it in the **Vendor Ticket Number** field.
13. Click the Categorization tab
 - **Operational Categories:** They capture the *action* occurring in this incident. OpCats are used the following way in Remedy OnDemand:
 - **Product Categories:** Describe the *product* involved in this case. If you know the product name, start to type it in the *Product Name* field, and the ProdCat tiers will backfill.
14. Click **Save**.

Viewing added customer data in the **Details** tab

If service requests are being populated by a user portal, then you may see additional tabs in your work order views. These **Details** tabs will capture additional information about the user's request.

To view or edit the data shown in these tabs, click on the appropriate tab and update accordingly.

Work Detail	Categorization	Tasks	Relationships	Details	Details 2	Dates/System
Description				<input type="text"/>		<input type="button" value="⋮"/>
Exchange Account Type				<input type="text"/>		<input type="button" value="⋮"/>
Exchange Account Name				<input type="text"/>		<input type="button" value="⋮"/>
Display Name				<input type="text"/>		<input type="button" value="⋮"/>
Are you the Sponsor?				<input type="text"/>		<input type="button" value="⋮"/>
.				<input type="text"/>		<input type="button" value="⋮"/>
.				<input type="text"/>		<input type="button" value="⋮"/>
.				<input type="text"/>		<input type="button" value="⋮"/>
.				<input type="text"/>		<input type="button" value="⋮"/>
Sponsor Net ID/Group				<input type="text"/>		<input type="button" value="⋮"/>
Owner				<input type="text"/>		<input type="button" value="⋮"/>
Optional IT Support Staff				<input type="text"/>		<input type="button" value="⋮"/>
Description				<input type="text"/>		<input type="button" value="⋮"/>
.				<input type="text"/>		<input type="button" value="⋮"/>
.				<input type="text"/>		<input type="button" value="⋮"/>

Functional roles in Work Order Management

Work Order Management includes two functional roles — work order manager and work order assignee. Functional Roles provide additional capability to the users, not based on permission group

Work order manager- The work order manager is responsible for the quality and integrity of the work order management process.

Responsibilities and activities -In large companies, the work order manager's main responsibilities usually involve planning and oversight. However, in small companies the work order manager might also function as the work order assignee who performs the tasks for the work order. In the Work Order Management application, users with either the Work Order Manager or Work Order Assignee functional role can be assigned to individual work orders, so you can choose how to apply these roles in your organization.

Work order assignee -Work order assignees are responsible for planning and implementing assigned work orders. They are usually people with specialized abilities in the support department of larger organizations. The work order assignee might be working actively on the work order, or coordinating the efforts of other groups or individuals working on tasks, if necessary.

Assignee activities and responsibilities include the following:

- Gathering appropriate information based on the work order assigned
- Providing status updates to requesters on request
- Plan the task schedule
- Executing the tasks that make up a work order
- Reviewing all completed tasks, if more than one work order assignee helped complete the overall work order

How to create a work info entry and read it

To add updates to the incident, click on the **Work Detail** (red #1) tab. If you want to enter information or updates about the incident you can add that information in the **Notes** field (red #2). Attachments can also be added by clicking on the folder icon next to the **Attachment** field, this will allow you to browse to search for documents you may want to add to the incident. To delete an attachment, click on the icon that looks like a paper/eraser and that will remove the attachment. The **More Details** drop-down (red #3) can be selected to show space for more attachments and the work info type. Notes can be **Locked** (red #4), which prevents any further edits. The **View Access** can also be restricted (red #5).

This is not in use now, but when Remedy OnDemand has a customer-facing interface, this will determine what updates the customer can see.

Resolution and Recovery | Incident Closure | Closed

Work Detail | Relationships | Date/System | Classification

Updated By Email Yes 6

0 entries returned - 0 entries matched | Preferences | Refresh

Type	Notes	Files	Submit Date
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Add Work Info

Notes: 2

Attachment: <File Name> [Folder Icon] [Open Icon] [Delete Icon]

More Details 3

Attachment #2: <File Name> [Folder Icon] [Open Icon] [Delete Icon]

Attachment #3: <File Name> [Folder Icon] [Open Icon] [Delete Icon]

Work Info Type: General Information

Locked: Yes No 4

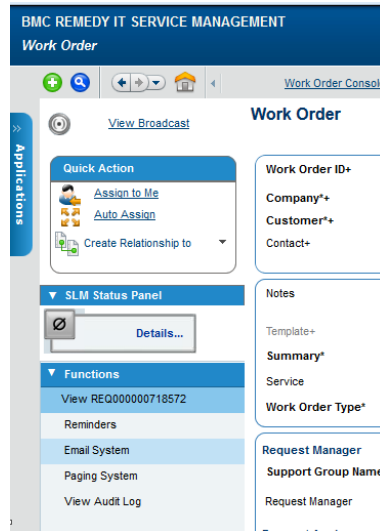
View Access: Internal Public 5

Add

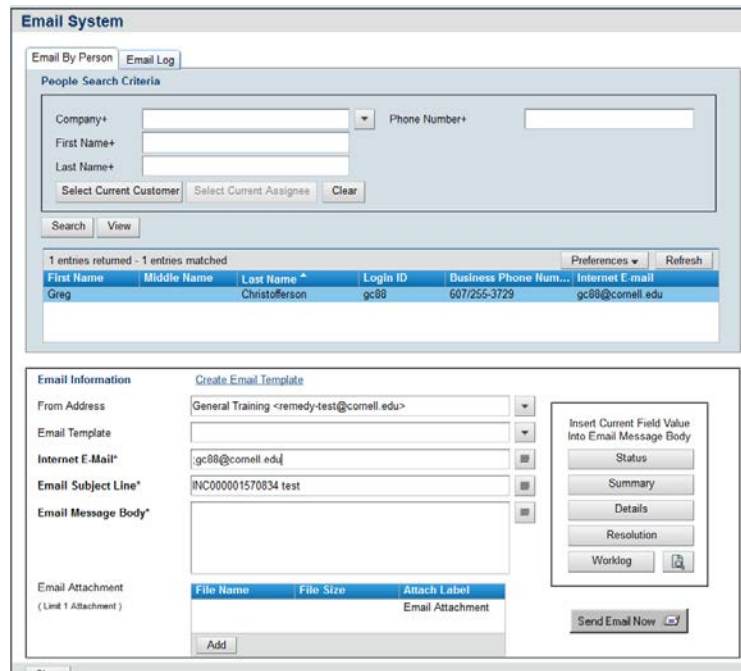
The **Updated By Email** flag (red #6) also resides on the **Work Detail** tab. This will be checked if someone has emailed into the incident.

How to send email from the Work Order Request

When viewing a Work Order click on the email function which is found under **Functions > Email System**



The email application will pop up:



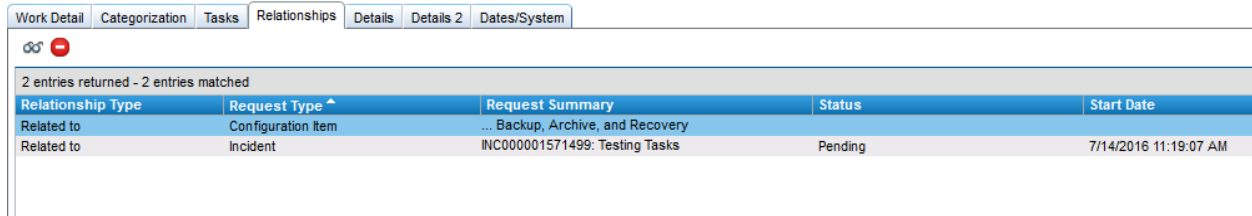
In this form, you can write your response in the **Email Message Body** section and then click **Send Email Now**. You can also use an **Email Templates**. Individuals can create their own templates, and those with special privileges (supervisors) can set email templates that entire

groups can use. Select these from the drop-down, and they will auto-fill the **Email Message Body** with preset text.

More than one template can be used per message: they fill in before or after the previous template. The email you send through Remedy will be logged as a work info in the corresponding Incident. The customer will receive the email with the message you have typed. If they reply to the message it will be added to the appropriate incident as a work info.

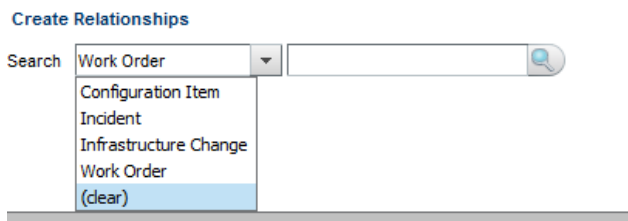
How to create Relationships between two incidents

Relationships tie cases together; relationships can be viewed in the **Relationships** tab as seen below.



Relationship Type	Request Type ^	Request Summary	Status	Start Date
Related to	Configuration Item	... Backup, Archive, and Recovery	Pending	7/14/2016 11:19:07 AM
Related to	Incident	INC000001571499: Testing Tasks	Pending	7/14/2016 11:19:07 AM

To create a relationship, select **Create Relationship to** and choose **Incident, Work Order, Configuration Item or Infrastructure Change** from the drop-down menu.

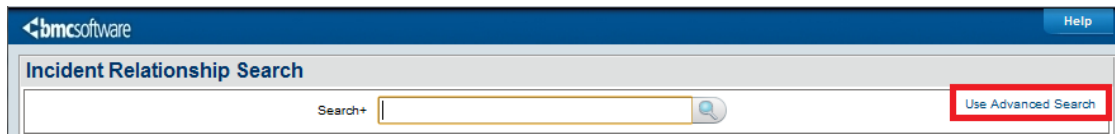


Create Relationships

Search Work Order Configuration Item Incident Infrastructure Change Work Order (clear)

If you know the number of the ID number that you would like to relate, you can enter it in the search field. If you don't know the item number then click on the magnifying glass to search

Choose **Use Advanced Search** from the top right of the search window that appears.



bmcsoftware Help

Incident Relationship Search

Search+ [] Use Advanced Search

From the advance search select the criteria to narrow down your selection and then highlight the items you want to relate and then click the **Relate** icon.

Incident Relationship Search Use Basic Search

Search | Categorization | Assignment | Date Range and Location | Contact and Customer

Assignment Information

Company:

Organization:

Assigned Group+:

Assignee+:

Owner Information

Company:

Organization:

Owner Group+:

Owner:

Vendor Assignment Information

Vendor Name:

Vendor Ticket #:

Search Note: The fields displayed in blue are not used within the Search Criteria. These fields are used to identify their respective ID values.

Incident ID	Summary	Status	Status Reason	Company	Priority
INC000001571683	Testing Training	Pending	Client Action Required	Cornell University	Medium
INC000001571680	Sample Email note	Pending	Client Action Required	Cornell University	Medium
INC000001571499	Testing Tasks	Pending	Client Action Required	Cornell University	Medium
INC000001571495	test 3	Cancelled		Cornell University	Medium
INC000001571494	mb118 test 3	New		Cornell University	Medium
INC000001571493	mb118 test 3	In Progress		Cornell University	Medium

Select a Relationship Type

Related to: