

Cornell University Cornell Information Technologies

Remedy Local Administrators Guide

Remedy version 2.5

Guide updated September 2015

For Remedy Support: remedy-admin@cornell.edu

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Interface and Environment Orientations

Production Environment

You and your support providers can access the production server using a web browser with this URL:

http://cornell.onbmc.com

Test Environment

You and your support providers can access the test server using a web browser with this URL:

http://cornell-qa.onbmc.com

Changes made to production configuration data are not automatically moved to test. If you wish to have a current test environment it is necessary to make the changes in both places. Roughly twice a year the support team will schedule a "refresh" of test to ensure it stays usably in sync with production.

Logging in to Remedy ITSM

When you first login to the system you will be presented with your home page. This page provides you with a series of links that take you to different components of the ITSM suite.

Organizational Structure

Remedy uses two parallel hierarchical structures:

| Company | Support Company |
|--------------|----------------------|
| Organization | Support Organization |
| Department | Support Group |

Company

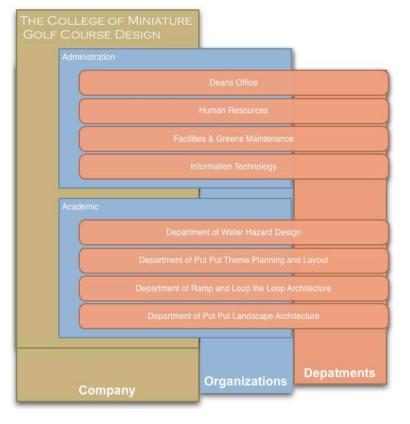
Our Customer Company is "Cornell University." Our Support Company is "Cornell University – IT."

There are many settings, filters, and configuration data that are company specific.

Organizations and Departments

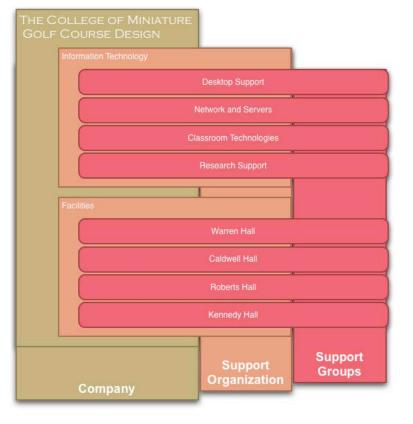
Remedy Organizations and Departments are data used to label customers. The typical organizations in a college would be "Administration" and "Academics." Organizations will be defined centrally.

Within the organization "Administration" you would find departments like Information Technology, Human Resources, Facilities, and other units with administrative functions. Within the "Academic" organization you would find academic departments. Local Remedy administrators will define Departments and Support Groups for their Organization.



Support Organizations and Support Groups

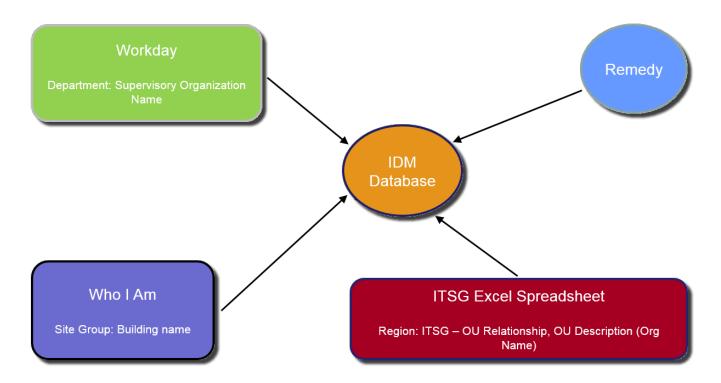
Support Groups play a major role in the definition of your company. Where the Company field and Support Organization fields are organizational containers, Support Groups are the only place where Incidents can be assigned. You cannot assign an incident to a Support Organization or Company.



People

Customer Data

There are two kinds of people in Remedy: support providers and customers. A nightly feed from Cornell's directory servers imports everyone as a customer. Changes made in the directory will be reflected one day later in Remedy. The data comes from different sources as shown below.



The import from the directory will overwrite any changes made to these fields in Remedy except the Corporate Email field.

Remedy People Metadata Data Source Document

In the Remedy Incident Management console, on the left side navigation pane select My Profile. You own profile will be displayed. To search for another user, click on New Search and enter the NetID in the Corporate ID field. You can use other search criteria as well (e.g. name).

| Remedy Field | Data Field | Sources | Comments |
|-------------------|--------------------------------------|--|---|
| VIP | Flag Y/N in Remedy | Remedy | A flag set in Remedy. If set to Y, then this individual is designated as a VIP and requires special handling. A process for designating VIPs is being developed and is not yet complete. Generally, Deans, Senior Leadership, and their Admin Assistants are considered VIP. More to follow |
| Organization | Workday/PeopleSoft OU Description | AD Group Description for an AD OU Designated for PeopleSoft. Housed in a table owned by Identity Management | This is not the Quest ARS OUs. There is a different structure for Workday/PeopleSoft Data. The OU full name and its relationship to the IT Service Group is kept in a table managed by Identity Management. |
| Department | Workday Supervisory Organization | Workday | Free form field in Workday (can cause inconsistency in the data) When name is changed or corrected in Workday, it doesn't apply to all existing employee profiles. (Changes are effective only when the profile is updated in Workday). |
| Region | IT Service Group | Table owned by Identity Management (see Organization field above) | Each service group Director is responsible to claim responsibility for one or more OU above. They can do so by sending an email to remedy-admin. Any data update will be reflected in Remedy only when the employee profile is updated in either Cornell directory or in Workday. For each ITSG one or more AD OU may exist. |
| Site Group | Building Name | Wholam | Maintain by the individual in Wholam. Updated by employee |
| Manager's Name | Manager's Name/NetID | Workday | Manager in Workday |

All the data is being fed to Remedy by a web service provided by Identity Management. The job runs every morning at 5 AM and includes the changes for the last 24 hours.

Implemented July 1, 2014. Tickets before this time may not have this data.

Possible Data issue:

- 1. Wrong IT Service Group: This will happen when an ITSG take over a new OU. When a department does take over a new OU, the ITSG Director should send an email to remedy-admin@cornell.edu and we can work with Identity Management to update the data pull.
- 2. **Grad Students:** Some Grad students are associated to the graduate school (Example: Engineering, Computer Science) which mean that they have SAS as an ITSG. When this is question look in Help Hero for the student's affiliated college.
- 3. **Contractor (e.g. Exception with Sponsor):** Contractor are not included in Workday/People soft OU so we don't have an organization and an ITSG for them.

Reporting Data Issues

If you notice problems with the People Metadata in Remedy, create a ticket in Remedy and assign to:

Company: Cornell - IT Support Org: CIT - Support Support Group: BPR & Tools Management

OR

Send and email to Remedy-service@cornell.edu.

Support Provider Data

Adding and Removing Staff to a Support Groups

Before you can add a staff member to your support group, the user must have a support staff designation in Remedy. To designate a support staff member, send an email to <u>remedy-admin@cornell.edu</u> requesting the user be granted support staff permissions (support staff designation). You need to provide one support group to add the user to.

Once a user has been assigned a support staff designation then Local Remedy Administrators will have the ability to add that user to support groups.

- 1. Log into Remedy.
- From the Applications tab, select Incident Management, then Incident Management Console.
- 3. On the left, under **Functions**, click **My Profile**.



| erson ID eople Informatio | PPL0000001698 | 8 | | | | | | |
|------------------------------|---------------------------|-----------|------------------------------|--------------|---------------|----------|------------|--------------|
| itle | | - | Corporate ID | 1 | | | Person | 's Image |
| irst Name* | 1 | | Profile Status* | Enabled | 1 | - | | |
| liddle Name | 1 | | Contact Type | staff | | - | č. | |
| ast Name*+ | 21 | _ | Client Sensitivity* | Standard | VIP* | No - | 2 | |
| lient Type* | Office-Based Employee | - | Support Staff* | Yes | | - | | |
| lob Title | | - | Assignment Availability | Yes | 5 | - | | |
| lickname | 1 | _ | A solution and a solution of | 103 | | | | 1 |
| | | | | | | | | |
| | ore Details Attributes W | ork Info | Cis Financials Login/Ac | cess Details | Support Group | is Not | ifications | Alternate Ar |
| Support Groups | | | | / | | | | |
| Support Groups | Support Group Functional | Roles | | / | | | | |
| 3 entries return | ed - 3 entries matched | | | 1 | | Preferer | nces 🗸 📗 | Refresh |
| Company | Support Organiz | zation | Support Group Name | 1 | Availability | Relation | nship Role | e Default* |
| Cornell Universit | | | Collaboration Services (L2) | | | Member | | Yes |
| Cornell Universit | | | Coll Phones | | | Member | | No |
| Cornell Universit | ty - IT CIT - Support | 1 | Becurity Service Desk | | Yes | Member | 6 | No |
| | | | 1 | | | | | |
| | | | | | | | | |
| | | | / | | | | | |
| | | | / | | | | | |
| | | | 1 | | | | | |
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| | | | - | | | | | |
| Update Support 0 | Foups and Role! Mark All | Unavailab | Modify Selected Support | Group | | | | |
| Update Support 0 | Sroups and Role Mark All | Unavailab | Modify Selected Support | Group | | | | |
| Update Support 0 | Sroups and Roles Mark All | Unavailab | Modify Selected Support | Group | | | | |

4. Click the Support Groups tab.

5. Select the support group to which you want to add support staff.

6. Click Modify Selected Support Group. A Support Group window will open.

| Support Gro | | | | | | | |
|--|-------------------|----------|-----------------------------------|---|------|---------------------------------------|----------------------------|
| Support Group | People Display | Roles [| Display Business Ho | ours and Holidays | | | |
| People Display | - | | | | | | |
| 10 entries return | ed - 0 entries m | atched | | | | Preferences - | Refresh |
| Full Name | | | Login ID | Relationship F | Role | Assignment Ava | ilas ility |
| | | | | Member | | Yes | |
| Contraction of Advances | | | | Member | | Yes | |
| Contract Streets | | | 1000 | Member | | No | |
| State Income | | | | Member | | Yes | |
| And in case of the local division of the loc | | | 100 | Member | | Yes | |
| Acres 1 Victory | • | | - | Member | | Yes | |
| - | | | 1000 | Member | | Yes | |
| Table II Inc. | | | | Member | | No | |
| | | | 1000 | Member | | No | |
| The second second | | | | Member | | No | |
| Report S | elect All De | Select A | 1 | Quick Actions | | | ▼ Execute |
| Submitter* .ast Modified By | antini Antinii | = | Submit Date Last Modified Date | 12/20/2012 3:54:09 PM 11/10/2014 11:24:48 AM | | Status* Propose Offline Archive | d Enabled Obsolete Delete |
| Save Clos | e | | | | | | |

- 7. Click on the **People** tab (you may need to click **refresh** to see the people entries).
- 8. To add a user,
 - a. Click Add. A Support Staff Search window will open.

| support stan | Search | | | | |
|----------------------|-------------|-------------------------|---------------------------------------|------------------------------|---------|
| Search Criteria | | | | | |
| Company+ | | | - | | |
| First Name+ | Phi | | | | |
| _ast Name+ | Sch | mertz | | | |
| Phone Number+ | | | | | |
| | S | earch Clear | | | |
| | | | | Preferences - | Refresh |
| First Name N Phil | liddle Name | Last Name * Schmertz | Business Phone Number 607/255-XXXX | Company Cornell Universit | y |
| | | | | | |
| Relationship Role | | | - | Add | |

- b. Type in the first and last name of the staff, then click Search.
 If the user has a support staff designation they will show up.
 If the user doesn't show up, they do not have a support staff designation. Email <u>remedy-admin@cornell.edu</u> to have the user setup with a support staff designation.
- c. Highlight the user in the search results, click the **Relationship Role** field, select **Member**, then click **Add**.
- 9. To delete a user from your support group,
 - a. Click the user's name on the **People** tab, then select **Delete**.
 - b. The application will confirm if you want to delete the user from the support group. Click Yes.
 - c. If the user is leaving your organization, please send an email to <u>remedy-admin@cornell.edu</u> requesting to revoke the user's support staff permissions.

Configuring Notifications to Customers

Customers submit incidents. The settings described here determine whether the customer receives an automated email message when the incident is created and/or when the incident is resolved.

By default, both notifications are sent to customers.

Most of the text in those messages is standardized across all units within the Cornell University "Company," but following information on the notifications can be customized for each Support Group:

| Field in Remedy | Usage in the Notification Emails |
|--|---|
| Exchange Group Account | The "From" address |
| Exchange Group Account Name | The descriptive text next to the "From" address |
| Group Web Address | The Support Group's web address |
| Group Phone Number | The Support Group's phone number |
| Special Notes (available on incident creation message only) | A block of text, which is added to the standard incident creation email |

Configuring Notifications

- 1. Log into Remedy.
- From the Applications tab, select Incident Management, then Incident Management Console.





| | C Q 👀 | < Inci | dent Console |
|--------------|-------------------------|---------------|----------------------------|
| » | 1 2 <u>New</u> | Broadcast | Show |
| × | Counts | | Incidents |
| B | 🗎 Open | 16 | Create |
| Cat | Dnassigned | 9 | Showing 1 - 1 |
| Applications | Diacknowledged | 15 | ID |
| | Breached | 1 | INC00000012 |
| | | | INC00000012 |
| | Functions | | INC00000011 |
| | New Incident | | INC00000011 |
| | Search Incident | | INC00000010 |
| | No Desfie | | INC00000010 |
| | My Profile | | INC00000010 |
| | Applicatio / references | | INC00000010 INC00000016 |
| | Reminders | | INC00000010 |
| | | | INC00000010 |
| | Reports | | INC00000010 |
| 1000 | Manage Cls | Contractor Co | INC00000010 |

4. Click the **Support Groups** tab.

| ittle ittle Corporate ID Profile Status* Enabled Profile Status* Enabled Profile Status* Enabled Profile Status* Enabled Contact Type Staff Contact Type Staff Contact Type Staff Support Staff Yes Client Sensitivity* Standard VIP* No Assignment Availability Yes Support Groups Support Group Functional Roles Support Groups Support Crongenization Contact Type Contel University-IT CIT-Support Collaboration Services (L2) No Member No Contel University-IT CIT-Support Collaboration Services (L2) No Member No | eople Informatio | n | | | | | | | |
|--|--|---|---|--------------|--------------------------|-------------------|--------------------------|----------|------------------------|
| Inst Name* | | | Corporate ID | 1 | | | F | Person's | Image |
| Itiddle Name Contact Type Staff ast Name*+ Client Sensitivity* Standard ▼ VIP* No ▼ Itient Type* Office-Based Employee ▼ Support Staff* Yes ▼ Assignment Availability Yes Vickname Assignment Availability Support Groups Support Groups Support Groups Support Groups Support Groups Support Groups Support Groups Support Group Support Group Functional Roles Support Groups Support Organization Support Group IUniversity - IT CIT - Support Comell University - IT Cline Support Group Name Comell University - IT Cline Support Croup Name View Mark View Mark Cont Cline Support Yes Member Yes | irst Name* | | | Enabled | | - | | | |
| Asst Name*+ Client Type* Office-Based Employee Assignment Availability Support Staff* Support Staff* Support Groups Company Support Group Support Group Functional Roles Support Groups Support Groups Support Groups Support Groups Company C | | at | | | | 1000 | | | |
| Support Staff* Yes Ident Type* Office-Based Employee Support Staff* Yes Identify | | | and the Constants | | | - | | | |
| ob Title Assignment Availability Yes Ickname I | ast Name*+ | | Client Sensitivity* | Standard | VIP* | No | * | | |
| lickname | lient Type* | Office-Based Employee | Support Staff* | Yes | | * | | | |
| Conneal University - IT CIT - Support Collaboration Services (L2) Automatical Support Groups Company Support Group Support Collaboration Services (L2) | ob Title | 111110 | Assignment Availability | Yes | | + | 1 | | |
| Support Groups Preferences - Refresh 3 entries returned - 3 entries matched Preferences - Refresh Company Support Organization Support Group Name Availability Relationship Role Default ^^ Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes | lickname | / | | | - | - | | | |
| Support Groups Preferences - Refresh 3 entries returned - 3 entries matched Preferences - Refresh Company Support Organization Support Group Name Availability Relationship Role Default ^^ Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes | Conoral H | are Details Attributes Work In | to Cla Einandiala Laginitar | and Data | Sunnort Gro | une | Hotific | otione | Altomate Ar |
| Support Groups Support Group Functional Roles 3 entries returned - 3 entries matched Preferences - Refresh Company Support Organization Support Group Name Availability Relationship Role Default ^ Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes | | ore Details Autobites Work in | ito dis Financiais LoginiAd | Less Details | oupponiore | dp5 | AODING | auons | Alternate A |
| 3 entries returned - 3 entries matched Preferences → Refresh Company Support Organization Support Group Name Availability Relationship Role Default ^ Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes | | | | / | | | | | |
| Company Support Organization Support Group Name Availability Relationship Role Default ^ Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes Cornell University - IT CIT - Support Collaboration Services (L2) Yes Member Yes | | | | | | | | | |
| Cornell University - IT CIT - Support Collaboration Services (L2) No Member Yes Cornell University - IT CIT - Support Coll Phones Yes Member No | | Support Group Functional Role | es | _/ | | | | | |
| Cornell University - IT CIT - Support Coll Phones Yes Member No | Support Groups | | 95 | -/ | | Pre | ference | es 🗸 📔 | Refresh |
| | Support Groups 3 entries return | ed - 3 entries matched | | | Availability | | | | |
| Cornell University - IT Corr - Support Security Service Desk Yes Member No | Support Groups 3 entries return Company Cornell Universit | ed - 3 entries matched Support Organization by - IT CIT - Support | Support Group Name Collaboration Services (L2) | | No | Rel Men | lations) nber | hip Role | Default ^ Yes |
| | Support Groups 3 entries return Company Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization ty - IT CIT - Support ty - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones | | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| | Support Groups 3 entries return Company Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization ty - IT CIT - Support ty - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones | / | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| | Support Groups 3 entries return Company Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization ty - IT CIT - Support ty - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones | | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| | Support Groups 3 entries return Company Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization ty - IT CIT - Support ty - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones | | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| | Support Groups 3 entries return Company Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization ty - IT CIT - Support ty - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones | / | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| | Support Groups 3 entries return Company Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization ty - IT CIT - Support ty - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones | | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| | Support Groups 3 entries return Company Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization ty - IT CIT - Support ty - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones | | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| Under Suspect Croups and Bala. Mark All Unschlaber Made, Saladad Suspect Croup | Support Groups 3 entries return Company Cornell Universit Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization by - IT CIT - Support y - IT CIT - Support y - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones Security Service Desk | | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| Update Support Groups and Role Mark All Unavailable Modify Selected Support Group | Support Groups 3 entries return Company Cornell Universit Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization by - IT CIT - Support y - IT CIT - Support y - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones Security Service Desk | Group | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |
| Update Support Groups and Role Mark All Unavailable Modify Selected Support Group | Support Groups 3 entries return Company Cornell Universit Cornell Universit Cornell Universit | ed - 3 entries matched Support Organization by - IT CIT - Support y - IT CIT - Support y - IT CIT - Support | Support Group Name Collaboration Services (L2) Coll Phones Security Service Desk | Group | No Yes | Rel Men Men | lations) nber nber | hip Role | Default * Yes No |

- 5. Select the support group for which you want to set group notifications.
- 6. Click Modify Selected Support Group.

7. Click the Cornell Custom Options tab. Modify the fields on this tab as desired. If your text is longer than about 30 characters, click the page icon next to the field to see an expanded text entry box. The entries in the first four fields will Equarite Groups On Call Group Notification Settings Cornell Custom Options

appear in notification emails.

- a. Exchange Group Account Email
- b. Exchange Group Account Name
- c. Group Web Address
- d. Group Phone Number
- 8. Check On Submit if you want the notification message sent to the customer on incident creation
- 9. Check **On Resolve** if you want the notification message sent to the customer on incident resolution.

11. Click Save.

10. On Submit Special Notes: If you have checked Customer Notification On Submit, the text you enter here will

appear in the message the customer receives.)

| | ravonie Groups On-Call Group Notlikation Settings Connell California (35) |
|---|---|
| 1 | Exchange Group Account Email |
| | Exchange Group Account Name |
| | Group Web Address |
| | Group Phone Number |
| | On Submit O Yes On Resolved Yes |
| | On Submit Special Notes |
| | |
| | Survey On Resolved Ves |
| | Number of Survey Question 2 |
| | Survey URL |
| | |
| | Customer Notification On Support Staff Email Update 🗌 Yes |
| | |
| | Reported Source 🗌 Yes Tier 1 OpCat 🖉 Yes Tier 1 ProdCat 🗌 Yes |
| | |

In Qualtrics surveys, the following embedded fields can be defined:

| INC | Incident Number |
|-----------|-------------------------------|
| Bserv | Business Services |
| Prod | Product Name |
| Owngr | Incident Owner Support Group |
| Ownorg | Incident Owner Organization |
| Sptgroup | Assigned Support Group |
| Sptor | Assigned Support Organization |
| Assignee | Assignee |
| Opcat | Tier 1 Operational Category |
| Subdate | Submit Date |
| Resdate | Resolution Date |
| Reportsrc | Reported Source |

Standard Notification Templates

Shaded items are the ones you can modify using the preceding procedure.

Items in {{double curly brackets}} are filled in based on the incident elements.

On Submit notification

| From | Exchange Group Account Name < Exchange Group Account > |
|---------|--|
| Subject | {{Incident Number}} – {{Summary}} |
| Body | Hello Customer {{Firstname}} {{Lastname}}, |
| | We have received your request for service. A support person will respond to you as soon as possible. |
| | Your request has been assigned a case number: {{Incident Number}} |
| | Request date: {{Incident creation Date/Time}} |
| | Original request:{{ Incident Summary}} |
| | Updates and additional questions regarding this incident are welcome. For faster service, always include your case number (Incident number) in the subject line of any related follow-up emails. |
| | Special notes |
| | Exchange Group Account Name |
| | Group Web Address |
| | Group Phone number |

On Resolve notification without survey

| From | Exchange Group Account Name < Exchange Group Account > |
|---------|--|
| Subject | {{Incident Number}} – {{Summary}} |
| Body | The following case has been marked as resolved. |
| | Case number: {{Incident Number}} |
| | Request date: {{Incident creation Date/Time}} |
| | Original request: {{Incident Summary}} |
| | Resolution: {{Incident Resolution}} |
| | Please reply if you have any further questions, or if your case remains unresolved. For faster service, always include your case number (Incident Number) in the subject line of any related follow-up emails. |
| | Thank you, |
| | Exchange Group Account Name |
| | Group Web Address |
| | Group Phone Number |

| On Resolve notification v | with survey URL |
|---------------------------|-----------------|
|---------------------------|-----------------|

| From | Exchange Group Account Name < Exchange Group Account> |
|---------|--|
| Subject | {{Incident Number}} – {{Summary}} |
| Body | The following case has been marked as resolved. |
| | Case number: {{Incident Number}} Request date: {{Incident creation Date/Time}} |
| | Original request: {{Incident Summary}} |
| | Resolution: {{Incident Resolution}} |
| | Please give us feedback with a <number of="" question="" survey=""> question survey by clicking the</number> |
| | link below. Please do not send it to anyone else, because this URL links the survey to your |
| | individual case information. |
| | <survey here="" link=""></survey> |
| | We value your input and will use it to improve our service to you and to measure customer satisfaction. |
| | Thank you, |
| | Exchange Group Account Name |
| | Group Web Address |
| | Group Phone Number |

Configuring Surveys

- 1. Log into Remedy.
- 2. From the Applications tab, select Incident Management, then Incident Management Console.



3. On the left, under **Functions**, click **My Profile**.



| Person ID | PPL00000016988 | | | | |
|------------------|-----------------------------|------------------------------------|-----------------|----------------|--------------|
| People Informati | on | | | | |
| Title | | Corporate ID | 100 million | Perso | on's Image |
| First Name* | 1 | Profile Status* | Enabled | - | |
| Middle Name | 1 | Contact Type | staff | | |
| Last Name*+ | 200 | Client Sensitivity* | Standard - VIP* | No - | |
| Client Type* | Office-Based Employee | Support Staff* | Yes | • | |
| Job Title | 10000 | Assignment Availability | Yes | - | |
| Nickname | | | | | |
| 3 entries return | ed - 3 entries matched | | 1 | Preferences - | Refresh |
| 3 ontries return | ad - 3 entries matched | | 1 | Preferences - | Refresh |
| Company | Support Organizat | tion Support Group Name | Availability | Relationship R | ole Default* |
| Cornell Universi | ty - IT CIT - Support | Collaboration Services (L2) | No | Member | Yes |
| Cornell Universi | | Coll Phones | Yes | Member | No |
| Cornell Universi | ty - IT CIT - Support | Security Service Desk | Yes | Member | No |
| | | 1 | | | |
| | | 1 | | | |
| | | 1 | | | |
| 2 | | | | | |
| | Croups and Pole Mark All Li | navailable Modify Selected Support | Group | | |
| Lindate Sunnort | | | Group | | |
| Update Support | Groups and Role; Mark An Or | | | | |

4. Click the Support Groups tab.

- 5. Select the support group for which you want to set group notifications.
- 6. Click Modify Selected Support Group.
- 7. Survey On Resolved: If you have checked Customer Notification On Resolved AND you check Survey On Resolved, a link to a short feedback survey will be added to the message the customer receives.)
- 8. If you have checked Survey On Resolved, enter the Number of Survey Questions.
- 9. If you have checked **Survey On Resolved**, enter the **Survey URL** (the URL will begin with cornell.qualtrics.edu)
- 10. Click Save.

Configuring Required Fields "On Resolve"

- 1. Log into Remedy.
- From the Applications tab, select Incident Management, then Incident Management Console.





0 Q (+) C (+) Incident Console 2 New Broadcast Show Counts Incidents Dpen 16 🗎 Create Dnassigned 9 Showing 1 -Diacknowledged 15 ID INC00000012 INC00000012 INC00000012 INC00000011 Breached 1 INC00000011 New Incident INC00000010 INC00000010 INC00000010 Search Incident My Profile Applicatio INC00000010 INC00000010 INC00000010 INC00000010 INC00000010 INC00000010 Reminders Reports INC00000010 Manage Cls

| de | | Corporate ID | 1 | Per | son's Image |
|------------------|-------------------------------|--|-----------------|---------------|---------------|
| rst Name* | | Profile Status* | Enabled | - | |
| ddle Name | 1 | Contact Type | staff | - | |
| ist Name*+ | | Client Sensitivity* | Standard - VIP* | No - | |
| ient Type* | Office-Based Employee | Support Staff* | Yes | - | |
| b Title | Carlos and | Assignment Availability | Yes | T | |
| ckname | | A standard and stand s | 103 | | |
| Support Groups | Support Group Functional Role | 95 | -/ | Proforoncoc | Pofrach |
| 3 entries return | ed - 3 entries matched | | 1 | Preferences - | Refresh |
| Company | Support Organization | | Availability | | Role Default* |
| Cornell Universi | | Collaboration Services (L2) | No | Member | Yes |
| Cornell Universi | | Cell Phones | Yes | Member | No |
| Cornell Universi | y - IT CIT - Support | Security Service Desk | Yes | Member | NO |
| | | | | | |

4. Click the Support Groups tab.

- 5. Select the support group for which you want to set group notifications.
- 6. Click Modify Selected Support Group.

Remedy Local Admin Guide v2.5 (updated September 2015)

- 7. Click the **Cornell Custom Options** tab.
- Check Tier 1 OpCat if

 a Tier 1 Operational Category
 is required when resolving an incident.
- 9. Check **Tier 1 ProdCat** if a Tier 1 Product Category is required when resolving an incident.
- 10. Click Save.

| Favorite Groups On-Call G | Cornell Custom Options |
|--------------------------------------|---------------------------------------|
| Exchange Group Account Email | |
| Exchange Group Account Name | |
| Group Web Address | |
| Group Phone Number | |
| | On Submit Ves On Resolved Ves |
| On Submit Special Notes | |
| Survey On Resolved | ✓ Yes |
| Number of Survey Question | 2 • |
| Survey URL | |
| Customer Notification On Support Sta | ff Email Update 🗌 Yes |
| Reported Source 🗌 Yes 🛛 Tie | er 1 OpCat 🗹 Yes Tier 1 ProdCat 🗌 Yes |

Setting Up Incident Creation Notifications to Support Providers

By default, when an incident is created, Remedy sends notifications to all members of the appropriate Support Group. An alternative is to use group notifications to send these messages to an Exchange Group Account (EGA) or e-list address instead.

The settings in the following procedure take precedence over any settings on the Notification tab in a user's profile.

To set up group notifications

- 1. Log into Remedy.
- From the Applications tab, select Incident Management, then Incident Management Console.
- IT Home IT Home Quick Links Applin -Compan Analytics BMC Configuration Drift Managen Knowledge Management Administrator Console Asset Management Contract Management Product Catalog oundation Elements Incident Management Console Service Request Management AR System Sample Application

BMC REMEDY IT SERVICE MANAGEMENT

3. On the left, under **Functions**, click **My Profile**.

| | IC REMEDY IT SERVICE M ident Console | MANAGEME | NT |
|----------------|---|------------------------------|----------------------------|
| | 🖸 🔇 争 💼 | < Inci | dent Console |
| » | () 2 <u>New</u> | Broadcast | Show |
| | Counts | | Incidents |
| Applications | Dpen Open | 16 | Create |
| a | Dnassigned | 9 | Showing 1 - |
| ŝ | Diacknowledged | 15 | ID |
| | Breached | 1 | INC0000012 |
| | | | INC00000012 INC00000012 |
| | ▼ Functions | | INC00000012 |
| | New Incident | | INC00000011 |
| | Search Incident | | INC00000010 INC00000010 |
| | My Profile | | INC0000010 |
| | · 1m | | INC00000010 |
| | Applicatio / references | | INC000001 |
| | Reminders | | INC0000010 |
| | Reports | | INC00000010 |
| . Int 12, 10 T | Manage Cls | and the second second second | INC0000001 |

4. Click the Support Group tab.

| itle | on . | Corporate ID | | Persor | 's Image |
|-------------------|-------------------------------|----------------------------------|--------------------------|-------------------|--|
| | | | | | |
| irst Name* | | Profile Status* | Enabled | | |
| liddle Name | 1 | Contact Type | staff | - | |
| ast Name*+ | Il. | Client Sensitivity* | Standard - VIP* | No - | |
| lient Type* | Office-Based Employee | Support Staff* | Yes | - | |
| ob Title | 11:10 | Assignment Availability | Yes | - | |
| lickname | / | | | | 1 |
| | | | ess Details Support Gro | | |
| | ore Details Attributes Work I | nfo Cls Financials Login/Acc | cess Details Support Gro | ups Notifications | Alternate Al >: |
| Support Groups | | | | | |
| Support Groups | Support Group Functional Rol | es | | | |
| 3 entries return | ed - 3 entries matched | | 1 | Preferences + | Refresh |
| Company | Support Organizatio | | Availability | | the second s |
| Cornell Universit | | Collaboration Services (L2) | No | Member | Yes |
| | | Coll Phones | Yes | Member | No |
| Cornell Universit | | Security Service Desk | Yes | Member | No |
| Cornell Universit | ty - IT CIT - Support | | | | |
| | y - IT CIT - Support | 1 | | | |
| | ty-IT CIT-Support | 1 | | | |
| | ty - IT CIT - Support | | | | |
| | y - IT | 4 | | | |
| | y-IT CIT-Support | 4 | | | |
| Cornell Universit | | vailabl Modify Selected Support | Group | | |
| Cornell Universit | | vailable Modify Selected Support | Group | | |

- 5. Select the support group for which you want to set group notifications.
- 6. Click Modify Selected Support Group.
- 7. Click the Group Notification Settings tab.
- 8. In the **Group Email** box, enter any combinations of
 - Exchange Group Account (EGA) addresses,
 - e-list addresses, and
 - email addresses.

If you enter more than one address, separate addresses with a carriage return.

Leave this field blank to have Remedy use the default, which is to send notifications to all members of this Support Group.

9. Click Save.

| Group Aliases Favorite Groups | On-Cal Group Notification Settings |
|-----------------------------------|------------------------------------|
| Disable Group Notificati() Yes (| |
| | |
| Group Email | juxtaposition-supp@cornell.edu 💻 |
| (| pqs665@cornell.edu |
| | |
| | |
| Notification Language | English (United States) |
| Exchange Group Account | |
| Exchange Group Account Name | |
| Group Web Address | |
| Group Phone Number | |
| Special Notes | |
| | On Subm 🔽 Yes On Resolve 📝 Yes |

Note: Leave Disable Group Notifications option set to No.

Incident Templates

Best Practice

The values that the administrator configures in the template forms are used to add information to the Incident form. This allows support staff to use standard business processes and increase automation and value.

Support staff can select any templates that are available for their support group(s). Templates are useful in a request that follows well-defined methods for specific and repeated requirements. You can create as many templates as you want. But the best practice is creating templates only for standardized processes that your support staffs perform on a frequent basis.

Templates are also used by the pmail process to create incident. An association is made between your Exchange Group Account (EGA) and a template you specify at configuration.

When creating an incident or on existing incident, a Template can be selected using the Incident template field.

Creating/Modifying Incident Management templates

- 1. Log into Remedy.
- From the Applications tab, select Administrator Console, then Application Administration Console.

| IT Home | | | |
|---------------------------------|-------------------------|----------------------|---------|
| 0 Q 📀 🔂 | IT Home | | |
| | | | |
| Quick Links | * | | |
| Analytics | - Ap | - Compan | |
| | Applications (equest ID | | |
| BMC Atrium Core | lequest ID | Request Type | Summ |
| BMC Configuration Drift Managem | ent w lequest ib | Request type | Journin |
| Knowledge Management | • | | |
| Administrator Console | Application Add | ministration Console | |
| Asset Management | • | 200 | |
| Contract Management | • | | |
| Product Catalog | • | | |
| Foundation Elements | • | | |
| Incident Management | | | |
| Service Request Management | • | | |
| AR System Sample Application | | | |

 On the Application Administration Console, on the Custom Configuration Tab, then select Incident Management > Template > Template and click Open.

| IC REMEDY IT SER | VICE MANAGEMENT | Home | Help Logout |
|---|----------------------|------|---------------|
| tandard Configuration | Custom Configuration | | < bmcsoftware |
| Application Adm | inistration Console | | |
| Application Settings | | | |
| Foundation | | | |
| Incident Management | | | |
| Template | | | |
| Template | | | |
| Task Management System | SC 111 | | |
| Description | | | |
| Manage Incident Template | :5 | | |
| Open | | | |
| | | | |

 From the Viewing Templates for Support Group drop-down, select the appropriate support group.

The list of templates displays the templates for that support group.

5. Click Create. The Incident Template form opens

| b mc software | | | Hel |
|--|---|------------------------|-----------|
| ncident Template Selection | | | |
| /lewing Templates for Support Group | Cornell University - IT/CIT - Support/C | communication and Docu | mentation |
| 2 entries returned - 2 entries matched | | Preferences - | Refresh |
| Operational Categorization Ti Product Ca | tegorization Template Name * | | Status |
| | CITSUPP Communication and I | Documentation | Enabled |
| | | | |
| | CIT-Support Communication an | | Enabled |
| View Create Delete | | | |

OR

Select a template, and click **View** to modify a template.

6. In the **Template Name** field on the Incident Template form, type a brief descriptive name for the **template**.

7. From the **Template Status** drop-down list, select **Enabled**, which indicates that the template is available for use in BMC Remedy Incident Management.

| Comme software | | | | | | | | | <u>Help</u> |
|-----------------------|----------------|---------------|---------------|----------|---------------------|--------------|------------|---------|-------------|
| Incident Te | emplate | | | | | | | | |
| Template Name | e* | Test template | | | = | Templat | te Status* | Enabled | • |
| Template Cate | gory Tier 1* | Fall Events | | | - | Sort Ord | er | | * |
| Template Categ | ory Tier 2 | Graduate Stud | ents | | - | | | | |
| Template Categ | ory Tier 3 | Housing | | | | | | | |
| Classification | Categorization | Assignment | Relationships | Resoluti | ion Authored | d For Groups | 1 | | |
| Classification | on | | | | | _ | | | |
| Summary* | | | | = | Status* | | | | • |
| Notes | [| | | = | Status Reaso | 'n | | | |
| | | | | | Impact | _ | | | - |
| Reported So | urce | | | | Urgency Priority | | | | • |
| Incident Type | l | | | | Weight | | | | |
| Service | · · · · · | | | | rogin | | | | |
| CI + | Ì | | | | | | | | |
| | /1 | | | | | | | | |
| Save Clo | ose | | | | | | | | |

8. Select or create the appropriate template categorizations for **Tier 1**, **Tier 2**, and **Tier 3**.

To create a template categorization, type the category name in the **template category** field. When you save the template, the category name is also saved and added to the field's selection list, where it is available to select when you create the next template.

- 9. Configure classification settings
 - a. On the Incident Template form, click the **Classification** tab.
 - b. From the **Impact** list, select an impact level for the incident form that is created when the template is used.
 - c. From the **Urgency** list, select a level of urgency for the incident form.
 - d. The **Priority** value is based on the impact and urgency.
 - e. From the **Incident** Type list, select the type of service that is recorded when the template is used.
 - f. From the Service list, select the related business service CI, for example, Email Service.
 - g. Click Save.

10. Configure Categorization settings

- a. On the Incident Template form, click the **Categorization** tab.
- b. Select the appropriate **operational categorizations** for Tier 1, Tier 2, and Tier 3.
- c. Select the appropriate product categorizations for Tier 1, Tier 2, Tier 3, Product
- d. Enter Product Name, and Model/Version.

11. Configure assignment settings

- a. On the Incident Template form, click the Assignment tab.
- b. To assign the incident to the user creating the incident, in the Assign To Current User field, select Yes. Otherwise, use the following steps for assignment settings:
 - i. In the **Support Company** field, select the **company** that incidents created from the template will be assigned to.
 - ii. In the Support Organization field, select an organization.
 - iii. In the Assigned Group Name field, select a group.
- c. Click Save.

12. Configure resolution settings

Typically, you use this tab only when creating templates for incidents that can be resolved when they are recorded. For example, this might be used for frequently asked questions, such as how to change your password.

- **Tip**: The resolution details can remind support staff of the steps to resolve an issue. For example, the details could list all the places to check for a paper jam on a printer.
- a. On the Incident Template form, click the **Resolution** tab.
- b. In the **Resolution** field, type the steps that resolve the incident.
- c. From the **Resolution Method** list, select **On-Site Support, Service Desk assisted**, **Self-Service**, or **Remote Control**.
- d. Click Save.

13. Set groups that can use the template

The template authoring group specifies the group that can modify this template. If you have the Support Group Admin functional role or the Incident Config permission, you can assign the template authoring group to any group.

- a. On the Incident Template form, click the Authored For Groups tab.
- b. Click Update.
- c. The Template Support Group Association dialog box appears.
- d. To add groups that can use this template, follow these steps:
- e. Select the company, support organization, and support group.
- f. Click Add.
- g. Click Close, then click Save.

Email Templates

Email templates (also referred to as predefined replies or standard emails) are used to respond to a common question or problem. They are also use by the email process to create incident sends to a mailbox.

Regular users can create Individual templates, which they can use when responding to an incident.

A user with the functional role of Support Group Manager, Support Group Lead, or Support Group Admin can also create Group templates, which will be available to any member of their support group.

Creating Email Templates

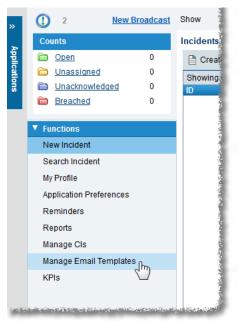
There are two methods for creating an Email Template. The first method involves creating it before you need it. The second method allows you to turn any email response into a template.

Method One: Create a Template Before You Need It

- 1. Log into Remedy.
- 2. From the Applications tab, select Incident Management, then Incident Management Console.

 On the left, under Functions, click Manage Email Templates. The Email Template Console will open.





4. Enter an Email Template Title and the Email Body text.

| | | Cornell Email T | emplate Console | < | bmc software |
|------------------------|------------------------------|-------------------|-------------------|---|---------------------|
| Email Templates (Dou | ıble-Click to select a recor | ď | | | |
| 2 entries returned - 2 | entries matched | | | Preferences 🗸 | Refresh |
| Template Type | Template Title ^ | Email Body | Group | Status | |
| Group | Test Benoit | Group Template 12 | 231 | Active | |
| Group | test group collab | adfasdf | Collaboration Ser | vices Active | |
| Report DeSele | Use RR when RR-Secu | | | | up 🔘 Individual |
| Email Body | | | | d yourself in a location where ss you are working with sensi | |
| | Create Modify Clear | Fields | | | |

- 5. From the **Status** drop-down list, select **Active**.
- 6. For Template Type, select Group or Individual.(Only Support Group Managers, Leads, and Admins can select Group.)
- 7. Click Create.

If you selected **Group** and you are the manager, admin, or lead for more than one group, you will need to select the support group for which the template is available.

Method Two: Turn an Email Response Into a Template

You can also create a template while working in the Email form. This is useful when you find yourself creating an individual reply that you can foresee using again.

- 1. Open an incident.
- 2. Under Functions (on the left), click Email System. The Email System window will open.

| Email System | |
|--|--|
| Email By Person Email Log | |
| People Search Criteria | |
| Company+ First Name+ Last Name+ Select Current Custom | Phone Number+ |
| Search View | |
| 1 entries returned - 1 entri | es matched Preferences - Refresh |
| First Name Middle N | lame Last Name A Login ID Business Phone Numt Internet E-mail |
| Email Information | Create Email Template |
| Email Template | Insert Current Field Val |
| Internet E-Mail* | Into Email Message Bc |
| Email Subject Line* Email Message Body* | Summer hours for the Balch Hall Satellite Office are Monday-Friday, 10am-4pm. |
| Email Attachment | File Name File Size Attach Label |
| (Limit 1 Attachment) | Email Attachment Send Email Now (=) |
| | Add |
| Close | |

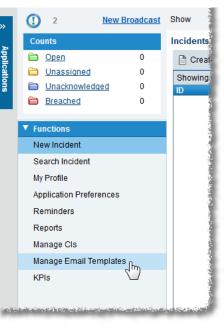
- 3. In the Email Information section, enter the Email Message Body text.
- 4. Click **Create Email Template**. An **Email Template** form will open with the **Email Body** field filled in with the text from your email message.
- 5. Enter an Email Template Title.
- 6. From the **Status** drop-down list, select **Active**.
- For Template Type, select Group or Individual. (Only Support Group Managers, Leads, and Admins can select Group.)
- 8. Click Save (at the upper left corner of the form).

Modifying Email Templates

- 1. Log into Remedy.
- From the Applications tab, select Incident Management, then Incident Management Console.

 On the left, under Functions, click Manage Email Templates. The Email Template Console will open.





- 4. In the **Email Templates** table at the top of the screen, click on the template you want to edit. The fields on the lower part of the screen will show you the information for that template.
- 5. Edit the **Title**, **Body**, **Status**, and/or **Type** information as desired.
- 6. Click Save.

Using Email Templates

- 1. Open an incident.
- 2. Under Functions (on the left), click Email System. The Email System window will open.

| nail System | | | | | | | | | |
|--|-------------|-----------------------|------------|------------------------|------------|-------------------|---|---|---|
| Email By Person Email L | oa | | | | | | | | |
| People Search Criteria | | | | | | | | | |
| Company+ First Name+ Last Name+ Select Current Custon | Select Cu | rrent Assigned | ▼ Clear | Phone Num | nber+ | | | | |
| | | nentrissignee | olcar | | | | | | |
| Search View | | | | | | | | | |
| 1 entries returned - 1 en | tries match | ed | | | | F | Preferences 🗸 | Refresh | |
| First Name Middle | Name | Last Name * | Lo | gin ID 🛛 🛛 | Business P | hone Nu | ml Internet E-r | nail | |
| | nume | | | | | | | | |
| Email Information | | mail Template | | | | | | | |
| Email Information | | | | | | | Insert Curren | t Field Val | |
| Email Information Email Template | | | | | | Croup | Insert Curren ♦ Group Ema | | |
| Email Information Email Template Internet E-Mail* | Create E | | 2 | | | Croup | Group Email ual I test group | ail Template o collab | l |
| Email Information Email Template | Create E | Email Template | 2 | | | Croup | Group Email ual I test group | ail Template collab hen RR-Secu | l |
| Email Information Email Template Internet E-Mail* Email Subject Line* | Create E | <u>Email Template</u> | 2 | Attach L Email Atta | | Group Individu | Group Email test group Use RR wh | ail Template o collab hen RR-Secu ilis | l |

- 3. In the **Email Information** section, click the arrow at the right end of the **Email Template** field.
- 4. From the menu that appears, select **Group** or **Individual**, then select the desired template. The body text for that template will be pasted into the **Email Message Body** field, after any text already in the body.

You can select more than one template by repeating the step 4. Each time, the body text for the selected template will be added to the **end** of the text already captured in the **Email Message Body** (regardless of where you have placed the insertion point).

Reporting

Creating Reports via Search

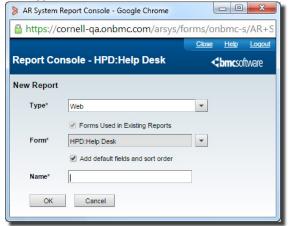
- 1. Run a Search to display the data you wish to report on
- 2. Click Select All.
- 3. Click **Report**. The **Report Console** will open.

| | AC REMEDY IT SERVICE MANAGEMENT |
|--------------|---|
| | Overview Console > Incident (Search) Current mode: Modify |
| > | Save 🔍 New search 🖻 Modify all Searches My Reports Advanced search Clear |
| 2 | 111 of 111 results |
| Applications | Incident ID*+ * Last Name+ First Name+ Summary* INC000001234859 INC000001225196 INC000001225196 INC000001217954 INC000001215539 INC000001215539 INC000001215539 INC000001215539 |
| | Report Select All DeSelect All |
| | View Broadcast Identification and Recording |
| | Quick Action Incident ID*+ INC000001234859 |

4. Click the green + icon. A New Report dialog box will open.

| now [| All Reports Category | | • | (| G 😓 🐨 🖸 |
|---------|---------------------------|---------------|-------------------------|-------------|--------------------|
| Edit | Report Name A Owner | Form Name | Modified Date | Report Type | Description |
| 6 | AG-ITP Closed last 7 Days | HPD:Help Desk | 11/5/2014 11:27:56 AM | Web | Web Report |
| 6 Maria | AG-ITP Reported Source | HPD:Help Desk | 11/4/2014 9:48:12 AM | Web | Bar Chart |
| Ø. | AG-ITP Template Used | HPD:Help Desk | 9/26/2014 12:11:53 PM | AR System | Report Description |
| Ø | AG-ITS Closed Last 7 Days | HPD:Help Desk | 10/22/2014 12:48:31 PM | Web | Web Report |
| ø | Annual Closures | HPD:Help Desk | 9/22/2014 10:21:32 AM | Web | Web Report |
| : * |) | | 5/45/2004 4:0:00:07:444 | | |

5. For **Type**, select **Web**.



6. Select the appropriate **Form** based on your situation.

| HPD:Help Desk | Incident Report |
|---------------------------|-----------------------------------|
| HPD:WorkLog | Incident Work Details Report |
| PBM:Problem Investigation | Problem Report |
| PBM:Investigation Worklog | Problem Work Details Report |
| CHG:Infrastructure Change | Change Request Report |
| CHG:WorkLog | Change Request Work Detail Report |

7. Give your report a name, then click OK. The New Report Console will open. Here you can configure the report based upon the type of report you want to see and what data you want displayed.

| Report Co | nsole - HPD:Help Desk | | | | | | <u>Close</u> | Help bmcs0 | <u>Loqout</u> ftware |
|----------------|-----------------------|---|---|---|--------------------------------|---|--------------|---------------|-------------------------|
| New Report | - Reticulating Spline | | | | Preview | Save | Save As | | Back |
| Report Definit | tion | | | | | | | | |
| Form | HPD:Help Desk | | Columns Sorting and Grouping | 1 | | | | | |
| Title | Reticulating Spline | = | Available Fields | | | Column | | | |
| Description | | = | Active Tasks Additional Location Details Audit Broadcasted Flag CI+ | | Add > | Incident ID*+ Last Name+ First Name+ Summary* Service*+ | | ٦, | * |
| Content* | List | - | Cause City | | < Remove | Priority* Status* | | | - - |
| | Private | | Client Type Closed Date Closure Source | | < Remove All | Assigned Group Assignee+ Reported Date | | | |
| | | | Company Company Company*+ Contact Phone+ | • | Drag field to add or remove | Target Date SLM Real Time | | | |

- 8. Under Report Definition, from the Content dropdown, select List, Chart or Chart + List.
- 9. If your selection in step 8 included "Chart," use the fields on the **Chart Options** tab to control the design of your chart.

If your selection in step 8 included "List," use the fields on the **Columns** and **Sorting and Grouping** tabs to control the design of your report.

10. (optional) In the **Filter By** section, drag and drop the field(s) on which you'll be filtering, then specify the criteria.

| Filter By | | | | | | |
|-----------------------------|---|------------|------------|-------------|---|---|
| | | | | | | |
| Available Fields | | | Add Field | | | |
| Active Tasks | | | | | | |
| Additional Location Details | | | Assignee+ | is equal to | - | • |
| Assigned Group*+ | | | - | | | - |
| Assignee+ | | | | | | |
| Audit | | | | | | |
| Broadcasted Flag | | Drag field | | | | |
| CI+ | | to add | | | | |
| Cause | | | | | | |
| City | | | | | | |
| Client Type | | | | | | |
| Closed Date | | | | | | |
| Closure Source | | | | | | |
| Company | - | | Advanced | | | |
| L | | | P Advanced | | | |
| | | | | | | |
| | | | | | | |

- 11. (optional) Click **Preview** to see how your report will look. You can modify the report definition and filters as needed before saving your report.
- 12. After you have created your report, click **Save**.
- After you have saved the report, you can run the report and then export the data into multiple formats (Excel, PDF, etc.) by clicking on Export Report.

| | Run Run Showing page | 1 of 1 | Custome | r Survey 1 |
|--|----------------------------|-------------|------------|------------|
| Incident ID"+ Submit Date Last Name+ First | Incident ID*+ | Submit Date | Last Name+ | First Na |

Creating Ad-hoc Reports

- 1. From the Functions menu (on the left side of the screen while in Incident Management), click Reports. The Report Console will open.
- 2. Click the green + icon. A New Report dialog box will open.

| how | All Reports 💌 Ca | ategory | | - | (| G 🗟 🖉 |
|--------|---------------------------|---------|---------------|------------------------|-------------|--------------------|
| Edit | Report Name * | Owner | Form Name | Modified Date | Report Type | Description |
| Ø. | AG-ITP Closed last 7 Days | | HPD:Help Desk | 11/5/2014 11:27:56 AM | Web | Web Report |
| 6 M | AG-ITP Reported Source | | HPD:Help Desk | 11/4/2014 9:48:12 AM | Web | Bar Chart |
| 6 B | AG-ITP Template Used | | HPD:Help Desk | 9/26/2014 12:11:53 PM | AR System | Report Description |
| Ø | AG-ITS Closed Last 7 Days | | HPD:Help Desk | 10/22/2014 12:48:31 PM | Web | Web Report |
| 0 | Annual Closures | | HPD:Help Desk | 9/22/2014 10:21:32 AM | Web | Web Report |
| × × |) | | | 545004400007444 | | |

3. For **Type**, select **Web**.

| AR System F | Report Console - Google Chrome | | | X |
|-------------|-----------------------------------|--------------|---------------|--------|
| Attps://o | ornell-qa.onbmc.com/arsys/fo | rms/or | hbmc- | s/AR+S |
| | | <u>Close</u> | <u>Help</u> | Logout |
| Report Co | nsole - HPD:Help Desk | < | bmc so | ftware |
| New Report | | | | |
| Type* | Web | - | | |
| | Forms Used in Existing Reports | | | |
| Form* | HPD:Help Desk | - | | |
| | Add default fields and sort order | | | |
| Name* | | | | |
| ОК | Cancel | | | |
| | | | | |

4. Select the appropriate **Form** based on your situation.

| HPD:Help Desk | Incident Report |
|---------------------------|-----------------------------------|
| HPD:WorkLog | Incident Work Details Report |
| PBM:Problem Investigation | Problem Report |
| PBM:Investigation Worklog | Problem Work Details Report |
| CHG:Infrastructure Change | Change Request Report |
| CHG:WorkLog | Change Request Work Detail Report |

5. Give your report a name, then click **OK**. The **New Report Console** will open. Here you can configure the report based upon the type of report you want to see and what data you want displayed.

| New Report - Reticulating Spline Preview Save Save As Report Definition Form HPD:Help Desk Title Reticulating Spline Description Image: Source of the second | software |
|---|----------|
| Form HPD:Help Desk Title Reticulating Spline Description List Content* List Private Content* HPD:Help Desk Column Sorting and Grouping Column Column Content* List Private Column Colum | Back |
| Trible Reticulating Spline Description Image: Spline Content* List ✓ Private City Content* Variable Fields Active Tasks Add > First Name+ Summary* Content* Uist Object Content* Uist Object Content* Content* <td></td> | |
| Available Fields Column Description Additional Location Details Add > Additional Location Details Add > Audit First Name+ Summary* Summary* Content* List ✓ Private Client Type Client Type Sasyneet Group*+ Adsigneet Adsigneet | |
| Description Description Additional Location Details Audi Audi Additional Location Details Audi Add > First Name+ First Name+ First Name+ Summary* Cl+ Cause Cl+ Cause Chy Clent Type Client Type | |
| Ci+ Add All>> Service++ Content* List City Add All>> Service++ Clause City City Status Priority* Ø Private Cilent Type Assigned Group*+ Assignee+ | |
| City < Remove Status* Ø Private Client Type Assigned Group*+ Closed Date << Remove All | |
| Closed Date << Remove All Assignee+ | • |
| | |
| Company Target Date Company*+ Drag field to SLM Real Time Status Contact Phone+ add or remove | |

- 6. Under **Report Definition**, from the **Content** dropdown, select **List**, **Chart** or **Chart + List**.
- 7. If your selection in step 8 included "Chart," use the fields on the **Chart Options** tab to control the design of your chart.

If your selection in step 8 included "List," use the fields on the **Columns** and **Sorting and Grouping** tabs to control the design of your report.

8. In the Filter By section, drag and drop the field(s) on which you'll be filtering, then specify the criteria.

| itter By | | | | | | |
|---|------------|-----------|-------------|---|---|---|
| Available Fields | | Add Field | | | | |
| Active Tasks Additional Location Details Assigned Group*+ | | Assignee+ | is equal to | * | 1 | • |
| Assignee+ | | | | | | |
| Audit | | | | | | |
| Broadcasted Flag | Drag field | | | | | |
| CI+ | to add | | | | | |
| Cause | | | | | | |
| City | | | | | | |
| Client Type | | | | | | |
| Closed Date | | | | | | |
| Closure Source | | | | | | |
| Company | - | Advanced | | | | |
| | | Auvanceu | | | | |
| | | | | | | |
| | | | | | | |

- 9. (optional) Click **Preview** to see how your report will look. You can modify the report definition and filters as needed before saving your report.
- 10. After you have created your report, click **Save**.
- 11. After you have saved the report, you can run the report and then export the data into multiple formats (Excel, PDF, etc.) by clicking on **Export Report**.

| Run Run Showing page | 1 of 1 | Custome | Survey 1 |
|----------------------------|-------------|------------|----------|
| Incident ID*+ | Submit Date | Last Name+ | First Na |

Using Analytics

CIT provides several standard reports that we have developed based upon the feedback and needs of the user community. There are also a number of reports designed by the vendor

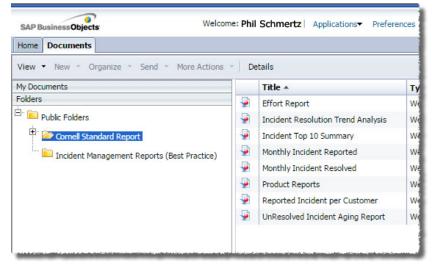
1. Log into Remedy.

| BMC REMEDY IT SERVICE MA | NAGEMENT |
|----------------------------------|----------------------|
| | IT Home |
| | « |
| Quick Links | · > |
| Analytics | Dashboards Company |
| BMC Atrium Core | Analytics |
| BMC Configuration Drift Manageme | nt ent K st ID Reque |
| Knowledge Management | • |
| Administrator Console | • |
| Asset Management | • |
| Change Management | • |
| Contract Management | > |

- 2. From the **Applications** menu tab (on the left edge of your browser window), select **Analytics**, then, on the sub-menu that appears, select **Analytics** again. At the top of the browser window you will see two tabs:
 - Home: displays a list of recently viewed reports
 - **Documents**: displays a navigable list of all reports

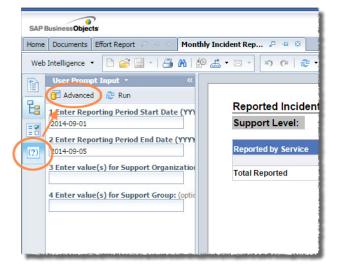
| SAP Business Objects | Welcome: Phil Schmertz Applications Prefere |
|------------------------------|---|
| Home Documents | |
| View • New • Organize • Send | More Actions Details |
| My Documents | Title 🔺 |
| 🦉 My Favorites | |
| The Introx | |
| 📴 My Alerts | |
| | 2 |
| Personal Categories | |
| | |
| | |
| * | |
| Folders | |
| Search | |

- 3. Click **Documents**. In the left navigation are three sections: **My Documents**, **Folders**, and **Search**. The section you select expands; the other two sections show just their title bar.
- 4. Click Folders.
- 5. In the folder hierarchy on the left, open **Public Folders**, then click on **Cornell Standard Reports**. The main section of the browser window will display the available reports.



Optional: You can have Remedy display the Cornell Standard Report folder immediately by setting your Start Page preference. (See the section below.)

6. Double-click the name of the desired report. A results screen will be displayed, but ignore this, as it shows the results for the default set of criteria.



- 7. On the left edge of the window you'll see four icons. Click the fourth, which is **User Prompt Input** (it shows a question mark in parentheses). Next to the four icons, in a section titled **User Prompt Input**, you'll see a list of the search criteria available for this report.
- 8. At the top of the **User Prompt Input** section, click **Advanced**. A **Prompts** dialog box will open (it may take a minute or so) where you can modify the search criteria. The exact list of criteria shown will depend on the report you've selected.
- 9. To change **Start Date** or **End Date** parameters, click it in the numbered list at the left of the **Prompts** window, then enter the value in YYYY-MM-DD format.

10. If your report has additional fields such as product, support group or support organization, click on the numbered prompt on the left to see a list of available options. Select the desired data from the list and then click the right-facing arrow to move that value to the box on the right.

| | Prompts | | × |
|---|---|---|---|
| < | Prompts Prompts Summary 1 Enter Reporting Period Start Date (YYYY-Mi 2 Enter Reporting Period End Date (YYYY-Mi 3 Enter value(s) for Support Organization; 4 Enter value(s) for Support Group; (optional | Refresh Values | × |
| | < > | CIT - Support CIT - Support CIT - Support Financial Aid and Student Employment University Budget Office February 12, 2015 4:28:52 PM GMT+00:00 | |
| | | Run Query Cancel | |

- 11. When you have finished specifying the report criteria, click **Run Query**. You will be returned to the results window (it may take a few moments), which now displays the results for your criteria. With some reports you will see more than one tab at the bottom of the browser window, offering different views of the data.
- 12. With some reports, you may further filter the results by Group within your Support Organization. Click the **Input Controls** icon (the third in the column of four icons on the left edge of the window), select one or more groups, then click **OK**.

Please note that the Groups filter is only applied to the tab (at the bottom of the browser window) you were viewing when you clicked OK. That is, if you filter by group on one tab, then click to a different tab, the results shown will still be for all groups.

13. To save your results, click the **Export** icon, select **Export Document As**, then select the desired document type.



Reports can also be configured so that a copy is automatically emailed to specified users when the report is run. If you are interested in this feature, please contact <u>remedy-admin@cornell.edu</u>.

Set Start Page

You can save yourself a few clicks by telling Analytics to display the Cornell Standard Report folder when you log on.

1. While in Analytics, in the toolbar at the top of the browser window, click **Preferences**. A **Preferences** dialog box will open.

| Preferences | NOT checked |
|---------------------------|--|
| Preferences | General |
| General | Use Default Settings (Administrator defined) |
| Change Password | |
| | Set BI launch pad start page: |
| Analysis edition for OLAP | Home tab |
| Web Intelligence | Default Home tab |
| BI workspaces | Select Home tab: Browse Home tab |
| Crystal Reports | |
| | Ocuments tab |
| | My Documents |
| | My Favorites |
| | Personal Categories |
| | My Inbox |
| | Folders |
| - | Public Folders |
| | Select Public Folder: Browse Folder |
| | |
| | |
| | Choose columns displayed in Documents tab: |
| | 🖉 Туре |
| | 🖉 Last Run |

- 2. On the left, click **General**.
- 3. In the main section of the dialog box, make sure Use Default Settings (Administrator defined) is NOT checked.
- 4. Under Set BI launch pad start page, click Documents tab.
- 5. Under **Documents tab**, click **Folders**.
- 6. Under Folders, click Public Folders.
- 7. Click Save & Close.

Updating Closed & Canceled Tickets

Update by Email Flag

As an admin you can clear the flags on Closed or Cancelled tickets. Just highlight the closed or cancelled incident, then click **Clear Email Updated**.

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|--------|--|------------------------|----------------------|--|--|---|---|---|
| | | | | | • \$ | | | Q |
| r By | All Open a | nd Updated by Em | ail > All Priorities | - 🔍 | Role Assignee | • | More | Filter |
| | | | | | | | | |
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| vervie | ew 🙀 Se | rvice Context | Quick Actions | <u> </u> | Clear Email Updat | ed) | Add To | o Watch Lis |
| vervie | ew 🙀 Se | rvice Context | Quick Actions | <u> </u> | Clear Email Updat | ed | | o Watch Lis ferences v |
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| | | | | | | Repor | Pref | ferences 👻 |
| | Priority | | | First Name | Assigned Group | Repor 8/21/2 | Pref rted Dat 014 8:4 | ferences v |
| | Priority High | Assignee | Email Updated | First Name Greg | Assigned Group General Training | Repor 8/21/2 9/11/2 | Pref ted Dat 014 8:4 014 8:4 | ferences ↓ te 7:11 AM |
| | Priority High Medium | Assignee | Email Updated | First Name Greg James | Assigned Group General Training General Training | Repor 8/21/2 9/11/2 9/11/2 | Pref ted Dat 014 8:4 014 8:4 014 8:4 | ferences v te 7:11 AM 7:20 AM |
| | Priority High Medium Medium | Assignee | Email Updated | First Name Greg James James | Assigned Group General Training General Training General Training | Repor 8/21/2 9/11/2 9/11/2 8/26/2 | Pret ted Dat 014 8:4 014 8:4 014 8:4 014 9:4 | ferences - te 7:11 AM 7:20 AM 8:00 AM |
| | Priority High Medium Medium Medium | Assignee | Email Updated | First Name Greg James James Sean | Assigned Group General Training General Training General Training General Training | Repor 8/21/2 9/11/2 9/11/2 8/26/2 8/27/2 | Pret ted Dat 014 8:4 014 8:4 014 8:4 014 8:4 014 9:4 014 3:2 | ferences - te 7:11 AM 7:20 AM 8:00 AM 0:34 AM |

Reopening a Closed or Canceled Ticket

To reopen a closed or canceled ticket, open the ticket and change the status to Assigned, then click Save.

| Assigned Group*+ | General Training | • |
|----------------------|--|-------|
| Assignee+ | James Bond | - 🤍 🕓 |
| Vendor Group+ | | • |
| Vendor Ticket Number | | |
| Status* | Closed 💌 | |
| Status Reason | New Assigned | |
| Resolution | In Progress Pending Resolved Closed Cancelled (clear) | |
| | | |