

# Cornell University Cornell Information Technologies

# Remedy Local Administrators Guide

Remedy version 2.5

Guide updated September 2015

For Remedy Support: <a href="mailto:remedy-admin@cornell.edu">remedy-admin@cornell.edu</a>

# Table of Contents

Interface and Environment Orientations	3
Production Environment	
Test Environment	
Logging in to Remedy ITSM	
Organizational Structure	3
Company	
Organizations and Departments	
Support Organizations and Support Groups	4
Customer Data	5
Support Provider Data	
Configuring Notifications to Customers	
Standard Notification Templates	
Configuring Required Fields "On Resolve"	
Setting Up Incident Creation Notifications to Support Providers	
Incident Templates	
Email Templates	24
Creating Email Templates	24
Modifying Email Templates	27
Using Email Templates	
Reporting	
Creating Reports via Search	
Creating Ad-hoc Reports	
Using Analytics	
Updating Closed & Canceled Tickets	
Update by Email Flag	
Reopening a Closed or Canceled Ticket	

# 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

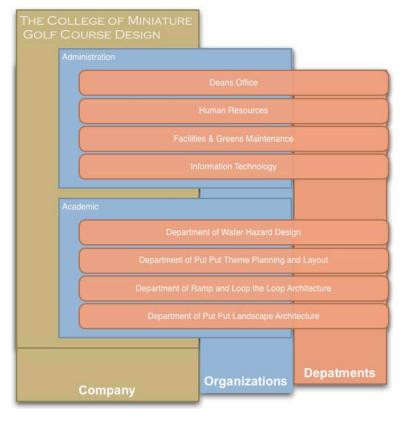
Our Customer Company is "Cornell University." Our Support Company is "Cornell University – IT."

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

### Organizations and Departments

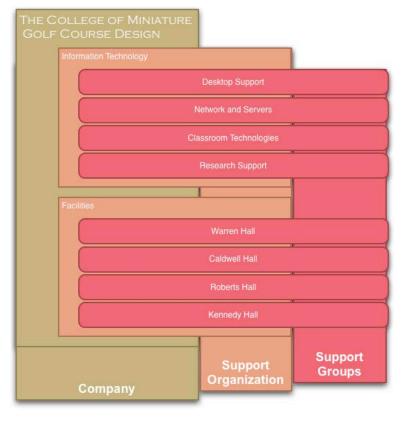
Remedy Organizations and Departments are data used to label customers. The typical organizations in a college would be "Administration" and "Academics." Organizations will be defined centrally.

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

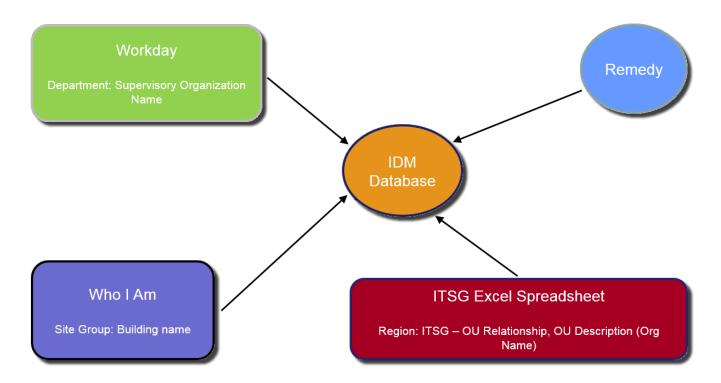
Support Groups play a major role in the definition of your company. Where the Company field and Support Organization fields are organizational containers, Support Groups are the only place where Incidents can be assigned. You cannot assign an incident to a Support Organization or Company.



# 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**.



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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	-		
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Support Groups				/				
Support Groups	Support Group Functional	Roles		/				
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			1					
			/					
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			-					
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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
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Contraction of Advances				Member		Yes	
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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.





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»	1 2 <u>New</u>	Broadcast	Show
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Cat	Dnassigned	9	Showing 1 - 1
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	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.

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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		-			
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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	<ul> <li>VIP*</li> </ul>	No	*		
lickname	lient Type*	Office-Based Employee	Support Staff*	Yes		*			
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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	<ul> <li>Support Staff*</li> </ul>	Yes	•	
Job Title	10000	Assignment Availability	Yes	<b>-</b>	
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			
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		1			
2					
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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	<b>T</b>	
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
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<b>»</b>	() 2 <u>New</u>	Broadcast	Show
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	▼ 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		
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ast Name*+	Il.	Client Sensitivity*	Standard - VIP*	No -	
lient Type*	Office-Based Employee	Support Staff*	Yes	-	
ob Title	11:10	Assignment Availability	Yes	-	
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	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			
<ul> <li>Incident Management</li> </ul>			
<ul> <li>Template</li> </ul>			
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 <b>mc</b> 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.

<b>Comme</b> 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*				<b>•</b>
Notes	[			=	Status Reaso	'n			
					Impact	_			-
Reported So	urce				Urgency Priority				<b>•</b>
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**

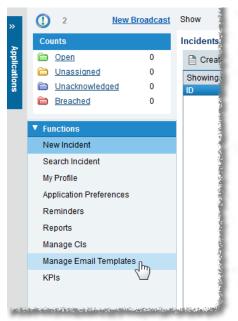
There are two methods for creating an Email Template. The first method involves creating it before you need it. The second method allows you to turn any email response into a template.

#### 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	<	<b>bmc</b> 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	

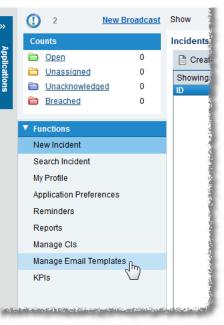
- 3. In the Email Information section, enter the Email Message Body text.
- 4. Click **Create Email Template**. An **Email Template** form will open with the **Email Body** field filled in with the text from your email message.
- 5. Enter an Email Template Title.
- 6. From the **Status** drop-down list, 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	
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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

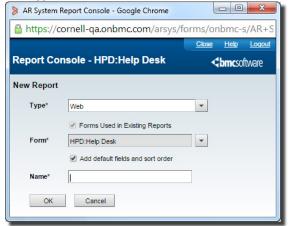
- 1. Run a Search to display the data you wish to report on
- 2. Click Select All.
- 3. Click **Report**. The **Report Console** will open.

	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	<	<b>bmc</b> 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

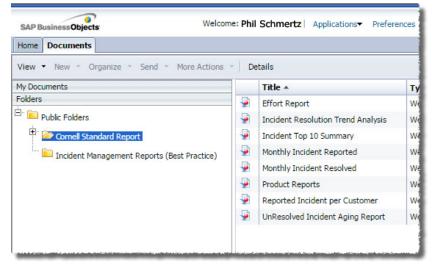
1. Log into Remedy.

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

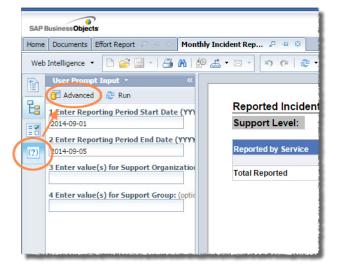
SAP Business Objects	Welcome: Phil Schmertz   Applications Prefere
Home Documents	
View • New • Organize • Send	<ul> <li>More Actions</li> <li>Details</li> </ul>
My Documents	Title 🔺
🦉 My Favorites	
The Introx	
📴 My Alerts	
	2
Personal Categories	
*	
Folders	
Search	

- 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.

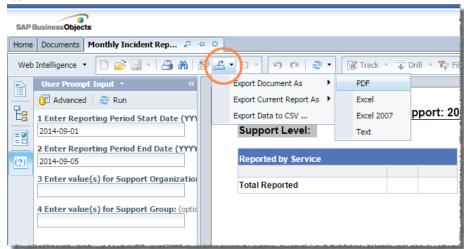
10. If your report has additional fields such as product, support group or support organization, click on the numbered prompt on the left to see a list of available options. Select the desired data from the list and then click the right-facing arrow to move that value to the box on the right.

	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**.

nive	ersity						 br	<b>nc</b> software
					• \$			Q
r By	All Open a	nd Updated by Em	ail > All Priorities	- 🔍	Role Assignee	•	More	Filter
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 <del>v</del>
	ew 🙀 Se Priority	avice Context Assignee	Quick Actions	First Name	Clear Email Updat			ferences 👻
						Repor	Pref	ferences 👻
	Priority			First Name	Assigned Group	Repor 8/21/2	Pref rted Dat 014 8:4	ferences <del>v</del>
	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 <del>↓</del> 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 <del>v</del> 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 <del>-</del> 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 <del>-</del> 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)	