

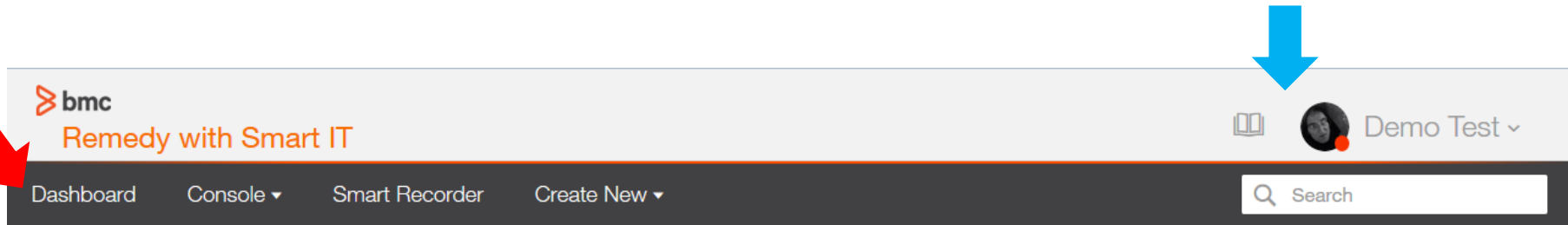
Smart IT

an Overview



October 17th 2016

Smart IT Header Views



Once logged into Smart IT, you will see this header which will appear on all screens.

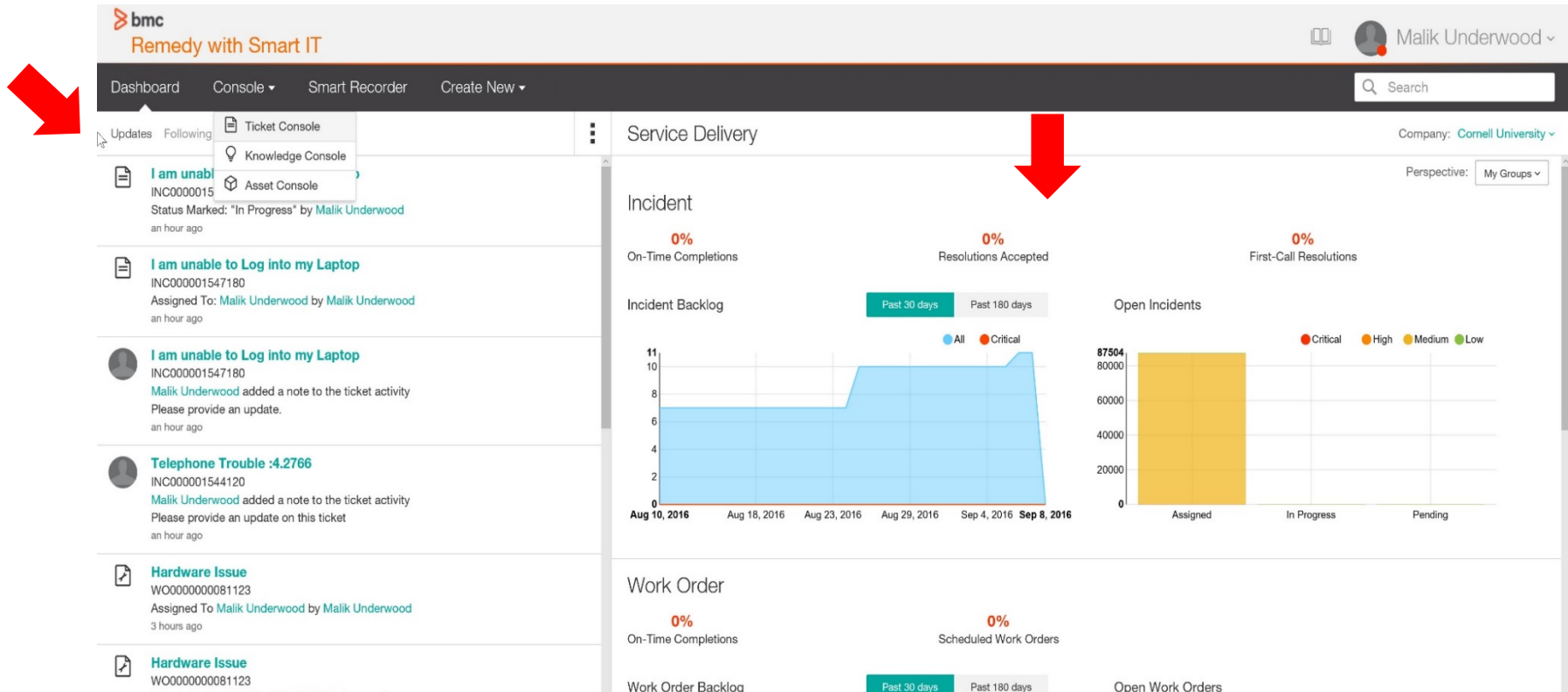
Top Bar

- Book Icon: tickets that have been previously opened in the current session (history) can be viewed by clicking this icon
- User Profile: provides users the ability to review/edit their profile, see information about the application and log out.

Menu Bar

- Dashboard: displays updates and built in KPIs
- Console: displays the Tickets Console
- Smart Recorder: a tool for quickly creating incidents
- Create New: manually create incidents
- Search Activity: provides you with filters or free form test for searching the updates

Dashboard



When you first log in you will be at the dashboard;

- The left hand panel shows information and updates on tickets assigned to your support group.
- On the right side are the pre-built Key Performance Indicator's (KPI) for Incident and Service Request. In the future these KPI's will also show Work Order and Change information

Console

The screenshot shows the BMC Remedy Ticket Console interface. At the top, the BMC logo and 'Remedy with Smart IT' are visible. The navigation bar includes 'Dashboard', 'Console', 'Smart Recorder', 'Create New', and 'Configuration'. The 'Console' menu is expanded, showing 'Ticket Console' selected. A search bar is present in the top right. The main area displays a summary of ticket counts: 1 My Ticket, 0 Critical Tickets, 0 New Tickets, 1 Open Ticket, and 1 All Tickets. Below this, there are filter buttons: 'Filter', 'All Open', and 'Assignee: Me'. A table lists tickets with columns for Priority, ID, Target Date, SLA Status, Customer Name, Assignee, Summary, Status, and Last Modified Date. A single ticket is shown with ID REQ000000695575, assigned to Malik Underwood.

To access the ticket console view, click on the arrow next to Console ▼ and then select Ticket Console. Note: the Knowledge Console is not available at this time.

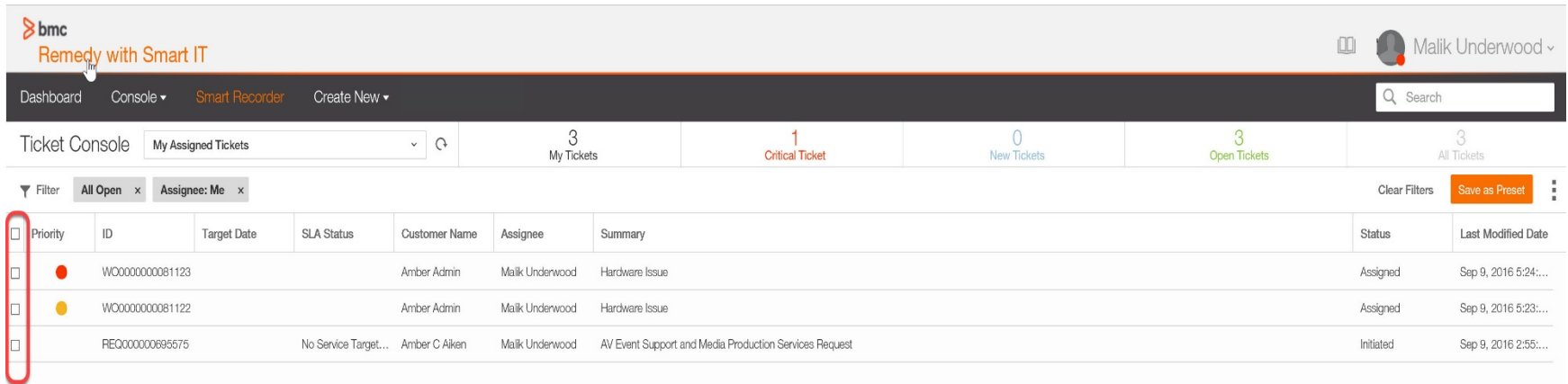
The Ticket Console provides a listing of Incident, Task and Service Request (Change and Work Order in a future release). This listing is based on the filter qualification. To view the details of a ticket, click anywhere on the row of that ticket.

Filters (circled in red) can be applied by clicking on the filter icon. Options such as “assignee, assigned group, priority,” etc will be presented to you. If you decide to create a filtered view, you can then save the filter by clicking “Save as a Preset”.

Preset qualifications can be selected by clicking the drop down arrow (black highlighted area).

You can toggle the sort order of the current view by clicking on a column heading.

Console: Performing Bulk Actions



The screenshot shows the BMC Remedy console interface. At the top, there is a navigation bar with the BMC logo and the text "Remedy with Smart IT". Below this, there are tabs for "Dashboard", "Console", "Smart Recorder", and "Create New". A search bar is located on the right side of the navigation bar. The main content area displays a "Ticket Console" with a dropdown menu set to "My Assigned Tickets". Above the table, there are statistics: "3 My Tickets", "1 Critical Ticket", "0 New Tickets", "3 Open Tickets", and "3 All Tickets". Below the statistics, there are filter buttons for "All Open" and "Assignee: Me". The table below has columns for "Priority", "ID", "Target Date", "SLA Status", "Customer Name", "Assignee", "Summary", "Status", and "Last Modified Date". Three tickets are listed, and the checkboxes in the "Priority" column are highlighted with a red box.

Priority	ID	Target Date	SLA Status	Customer Name	Assignee	Summary	Status	Last Modified Date
High	WO0000000081123			Amber Admin	Malik Underwood	Hardware Issue	Assigned	Sep 9, 2016 5:24:...
Medium	WO0000000081122			Amber Admin	Malik Underwood	Hardware Issue	Assigned	Sep 9, 2016 5:23:...
Low	REQ0000000695575		No Service Target...	Amber C Aiken	Malik Underwood	AV Event Support and Media Production Services Request	Initiated	Sep 9, 2016 2:55:...

By selecting two or more tickets, you can perform bulk actions in Smart IT.

Some of the bulk action options available to you include:



- **Assign:** Assign all selected tickets to an individual or group. Selected ticket types must be the same.
- **Share:** Send an email with the subject being the selected tickets.
- **Follow:** Receive updates for the selected items in the dashboard.
- **Link:** Relate selected tickets to another ticket. Selected ticket types must be the same.
- **Launch in new tab:** open details of selected tickets in new tab.
- **Update Status:** change the status of selected tickets. Selected ticket types must be the same.

These actions are not available from a mobile device.

Console: Adding / Removing Columns

Clear Filters Save as Preset **1**

Change and Order Columns

Click and drag or double click to reorder

Available Columns

- Columns that Apply to Multiple Ticket Types
- Change
- Incident
- Known Error
- Problem Investigation
- Service Request
- Task
- Work Order

Actual End Date
Actual Start Date
Assignee Company
Assigned Group
Change Class
Change Manager
Change Manager Company
Change Manager Group
Change Reason
Customer Company
Completed Date
Contact
Customer Department

Visible Columns

- Priority
- ID
- Target Date
- SLA Status
- Customer Name
- Assignee
- Summary
- Status
- Last Modified Date

Save Cancel

To add/remove column data on the console view, go to the top right side of the application and click on the 3 dots next to the Save as Preset button (#1).

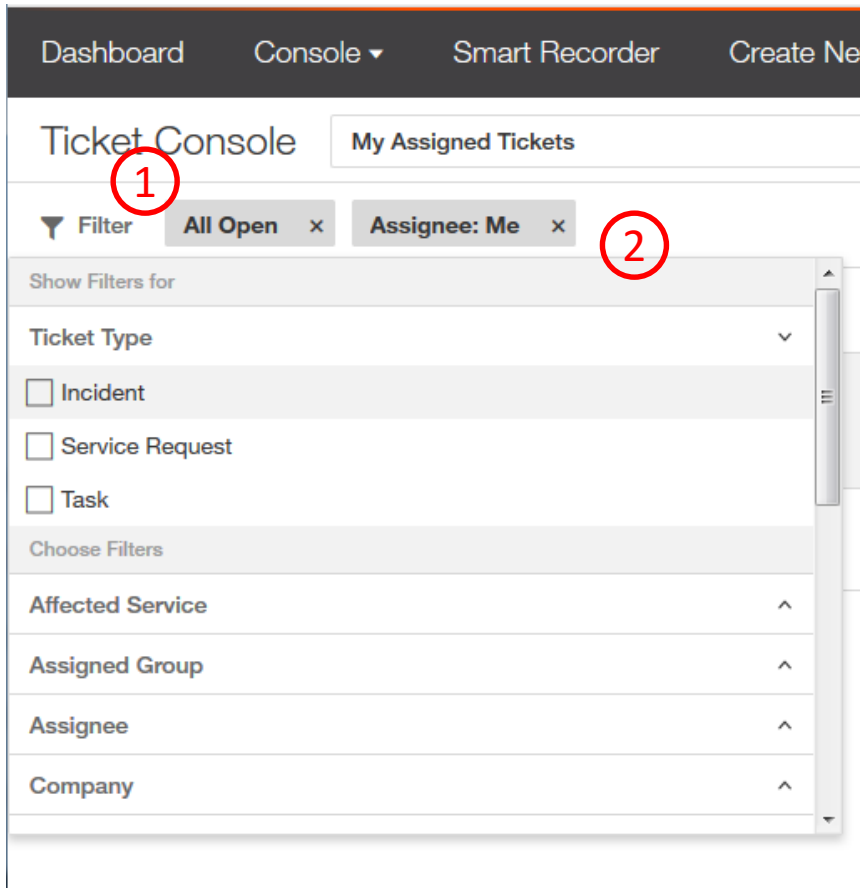
This will open the Change and Order Columns panel.

From here you can drag and drop columns to and from the Visible Columns list. Columns in the Visible Columns list appear on the Ticket Console.

Selecting a specific ticket type will only display available columns associated to that ticket type.

Click Save or Cancel to exit this panel.

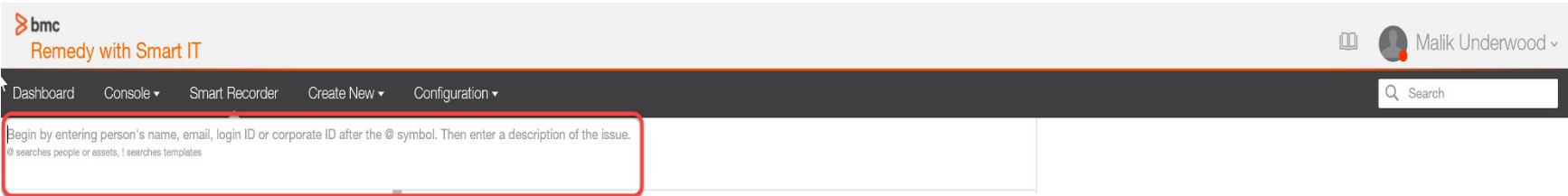
Console: Filter Qualifications



When you click on the **Filter (#1)** Icon a drop down list will appear.

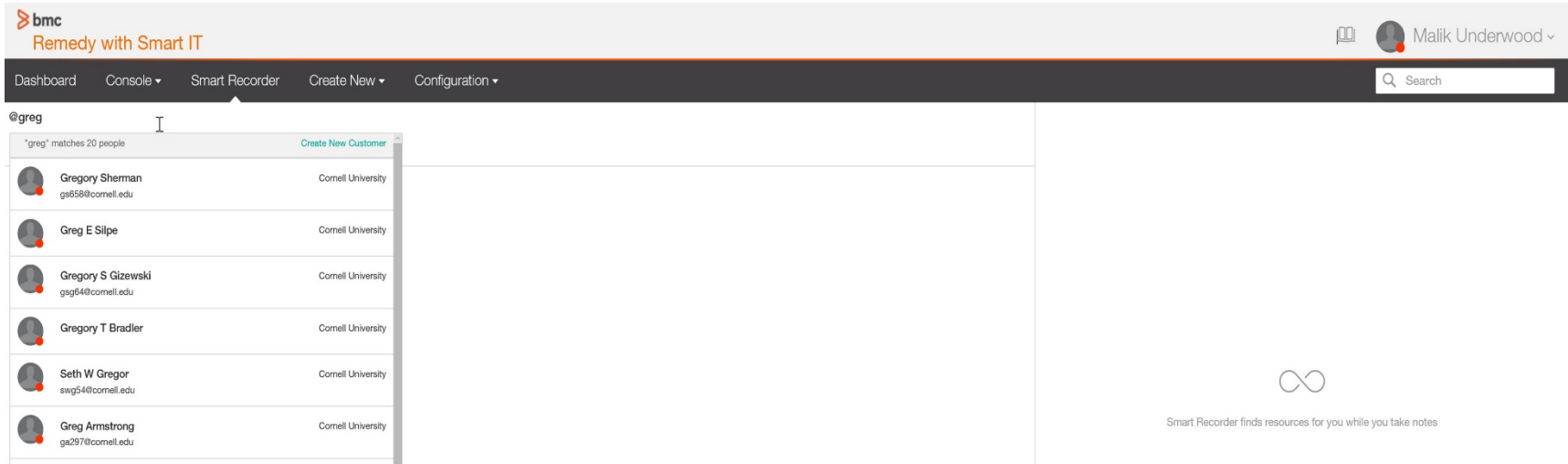
- Each filter type may have more than one selection. The arrows on the right side of the list will open or close that filter type. The example shows that Incident is selected. This will add only Incident ticket types to the current filter.
- You can select more than one selection within a filter type and/or multiple filter types.
- These selections are added to the previous filter qualification. Filter qualification items can be removed from the Ticket Console by clicking on the “x” next to the filter item (**#2**)
- To exit from the drop down list, click anywhere in a clear area of the window.

Smart Recorder



Smart Recorder uses a free form text entry field to help you focus on what the customer is saying, instead of filling out fields in a structured form. This way of creating a ticket helps you to capture information in real time, directly from the customer and in their own words

To create a ticket using Smart Recorder start by placing an @ symbol in the red highlighted area. The start typing the person's name, email or login ID. When you pause the system will return a list of people that meet your search data similar to below. Continue typing to reduce the list size or click on a person to select.



Smart Recorder: Creating a Ticket

The screenshot displays the BMC Remedy Smart IT interface. At the top left is the BMC logo and the text "Remedy with Smart IT". The top right shows the user profile for Malik Underwood. The navigation bar includes "Dashboard", "Console", "Smart Recorder", and "Create New". A search bar is located on the right side of the navigation bar.

The main content area shows a search for "Greg Christofferson hardware". The results include a customer profile for Greg Christofferson, a "Service Rating" section with 0 ratings and 0 escalations in the last month, and a "Templates (7)" section. The templates listed are "Incident Template Hardware Issue" and "Incident Template CUPD Hardware Trace request" with a priority of Medium.

Greg Christofferson hardware

Customer Greg Christofferson Hide Details

Greg Christofferson
CIO - CIT Support
VP for Information Systems
Cornell University

Phone
607/255-3729
gc88@cornell.edu

Site
CIT - DFA-Computing & Communications Ctr
Ithaca,
United States
Get Directions

Service Rating
☆☆☆☆☆ 0 Ratings ⚠️ 0 Escalations in Last Month

Contact Type Client Sensitivity

We found several helpful resources related to your issue.

Outages
No outages found

Templates (7)

- Incident Template Hardware Issue
- Incident Template CUPD Hardware Trace request
Priority: Medium

Once you've selected a person their information will be posted to the screen. Based on what you want to do, you have two options at this point.

- Put a space after the person's name and start typing a summary of the issue. When you pause, a list of resources that match your summary will be displayed in the right panel. You can select one of these to proceed with your activity.
- Put a space after the person's name followed by a !. Then continue typing a summary. A list of relevant templates will appear that you can select from to create the ticket.

Create New

The screenshot shows a web application interface for creating a new incident. At the top, there is a navigation bar with 'Dashboard', 'Console', 'Smart Recorder', and 'Create New'. A search bar is located in the top right corner. The main heading is 'Create Incident' with a sub-instruction: 'Complete fields and "Save" to open incident.' The form is divided into several sections:

- Affected Customer(s) (required):** A text input field with an 'Add person' button below it.
- Affected Company (required):** A text input field with the placeholder text 'Start typing the name of a company'.
- Select Incident Template:** A text input field with the placeholder 'Start typing the name of a common issue' and a 'Browse All Templates' button.
- Incident Title (required):** A text input field with the placeholder 'Type a title for this incident'.
- Impact (required):** A dropdown menu currently showing '4-Minor/Localized'.
- Urgency (required):** A dropdown menu currently showing '4-Low'.
- Calculated Priority:** A label showing 'None Yet'.
- Incident Status (required):** A dropdown menu currently showing 'New'.
- Incident Description:** A large text area with the placeholder 'Type a description of the problem' and a blue link icon below it.
- Affected Service:** A text input field with the placeholder 'Start typing the name of a service'.
- Affected Asset:** A text input field with the placeholder 'Start typing the name of an asset'.
- Operational Category:** A text input field with the placeholder 'Start typing to see matching categories' and a 'Browse Categories' link below it.
- Product Category:** A text input field with the placeholder 'Start typing to see matching categories' and a 'Browse Categories' link below it.
- Resolution Product Category:** A text input field with the placeholder 'Start typing to see matching categories' and a 'Browse Categories' link below it.

At the bottom left, there is a warning icon and the text '3 more required fields'. At the bottom right, there are two buttons: 'Save Ticket' (highlighted in orange) and 'Cancel'.

Using Smart IT, you can also create tickets from the **Create New** menu. The **Create New** menu uses a more traditional, form based way to create tickets.

To create a new ticket enter data in all of the required fields and then click the **Save Ticket** icon.

Ticket Details

The screenshot shows a ticket details page with the following sections and callouts:

- 1**: Ticket title and summary: "I have a computer error message".
- 2**: Customer information: Michelle Reynolds, VP for Information Systems.
- 3**: Record Summary info: Affected Service (Misc.), Operational Category (None Set), Product Category (Processing Unit).
- 4**: Assignment: Assigned to (None Yet), Support Group (Service Desk (Main Entry)).
- 5**: Additional Info: Total Time Spent (0).
- 6**: Tasks section: Tasks (0), + Add Task button.
- 7**: Related Items section: Related Items (1).

Tickets can be accessed through the **Console** or by clicking on the ticket number link in the **Dashboard**. When you open a ticket you will see:

1. Ticket Request Info: shows ticket number, summary, status, priority and functions like edit, email (share) and follow.
2. Customer Card Info: displays the customer information, phone, site location
3. Record Summary info: provides information on affected service, Operational Categories and Product Categories.
4. Assignment: assigned group, assignee, etc.
5. Additional Info: provides the ability to capture ticket effort
6. Tasks: displays associated tasks and ability to add tasks.
7. Related Items: displays related records and the ability to relate or add other records.

Ticket Details (cont)

Dashboard Console Smart Recorder Create New Search

I am unable to Log into my Laptop

Incident # INC000001547180 **High** Updated a few seconds ago

In Progress Ticket created on Sep 9, 2016 7:36 PM

Customer: Michelle Reynolds, VP for Information Systems
Contact Type: Staff

Affected Service: Desktop Support and Personal Computing
Description: Hardware Issue with: Computer
Type of Computer: Tablet
Issue With: Keyboard

Operational Category: None Set
Product Category: Processing Unit
Resolution Product Category: None Set

Activity **Resources**

Add a note

- Status Marked: "In Progress" by Malik Underwood a few seconds ago
- Assigned To: Malik Underwood by Malik Underwood a minute ago
- Malik Underwood added a note: Please provide an update. 3 minutes ago
- System Generated Comment: This ticket was created from the service request system. 6 minutes ago
- New INC000001547180 by Remedy Application Service 6 minutes ago

The right side panel has two tabs, **Activity** and **Resources**.

1. The **Activity** panel contains the work information of the selected ticket.
2. The **Resources** panel displays:
 - Outages – This feature not currently being used.
 - Recommended Knowledge – Default searched based articles that are not Cornell created. These articles will not be relevant to Cornell support staff.
 - Recommended Incidents – Incidents that may be similar to the selected ticket. These can be used to create duplicate relationships.

Ticket Details (cont)

The screenshot shows a ticket details page for the incident "I am unable to Log into my Laptop". The page is annotated with three red circles and boxes:

- 1**: A blue box highlights the "In Progress" status dropdown menu.
- 2**: A red box highlights the right arrow and star icons in the top right corner.
- 3**: Three red boxes highlight the "Edit" pencil icons in the "Status", "Assigned To", and "New" activity panels.

The ticket details include:

- Incident # INC000001547180 (High) Updated a few seconds ago
- Customer: Michelle Reynolds (VP for Information Systems)
- Contact Type: Staff
- Affected Service: Desktop Support and Personal Computing
- Description: Hardware Issue with: Computer
- Type of Computer: Tablet
- Issue With: Keyboard
- Operational Category: None Set
- Product Category: Processing Unit
- Resolution Product Category: None Set

The activity log shows:

- Status Marked: "In Progress" by Malik Underwood
- Assigned To: Malik Underwood by Malik Underwood
- Malik Underwood added a note: Please provide an update.
- System Generated Comment: This ticket was created from the service request system.
- New INC000001547180 by Remedy Application Service

Updating the ticket can be done in various places depending on the data to be updated.

1. The down arrow in the blue highlighted area is where you can change the status of the ticket.
2. The right arrow icon allows you to email from the selected ticket and clicking on the star icon is to follow this ticket (Updates will appear in the dashboard).
3. Clicking on the pencil icon in a particular panel allows you to edit the contents of that panel.

Note: Fields that are null may not display in the detail view but can be updated in edit mode.

What's the difference between Remedy Classic and Smart IT?

- You won't be able to apply incident templates on existing incidents. Templates can only be applied when you create an incident.
- The Work Detail entry is captured differently when you send an update with an attachment
- There is no "Update by Email" flag
- The console preference fields are different in Smart IT (less available than the classic view)
- Canceling a ticket now requires a status reason
- There is no Turbo Cancel
- There is no ticket Audit log
- Incident templates are now global and viewable to any user?
- The ability to use Email Templates is not available at this time.
- Smart IT will not work for "Read" license users.