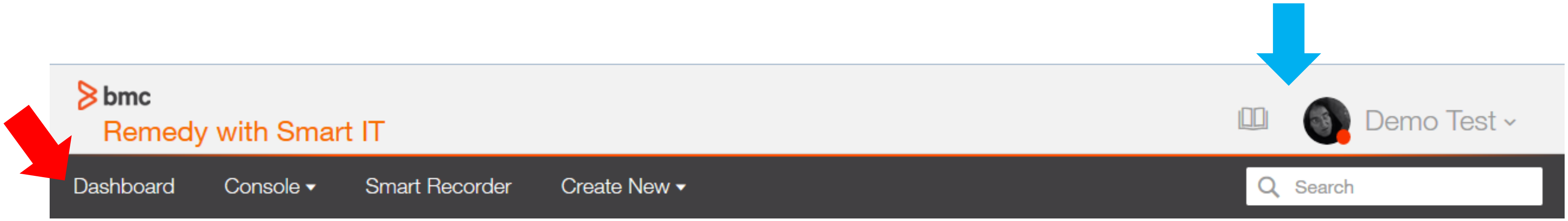
Smart IT

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.

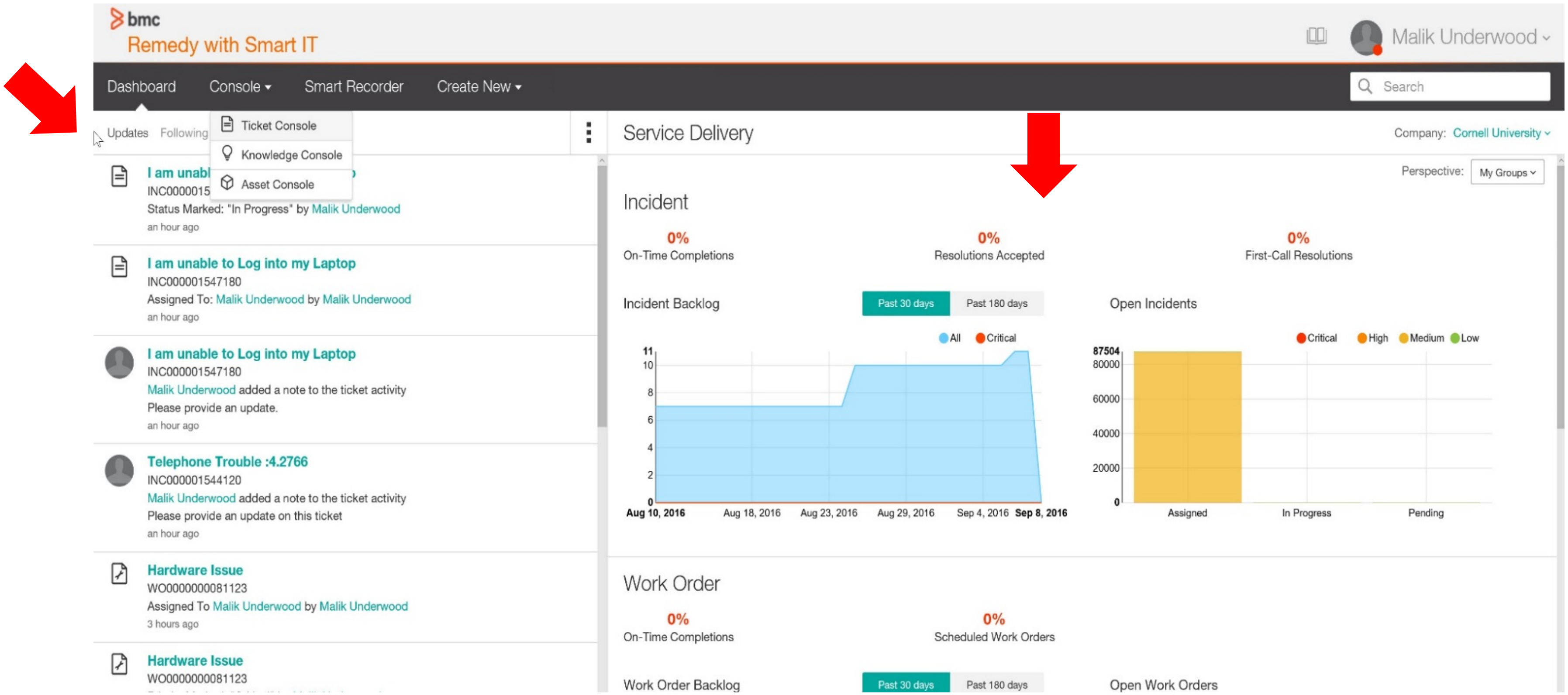
Top Bar

- 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

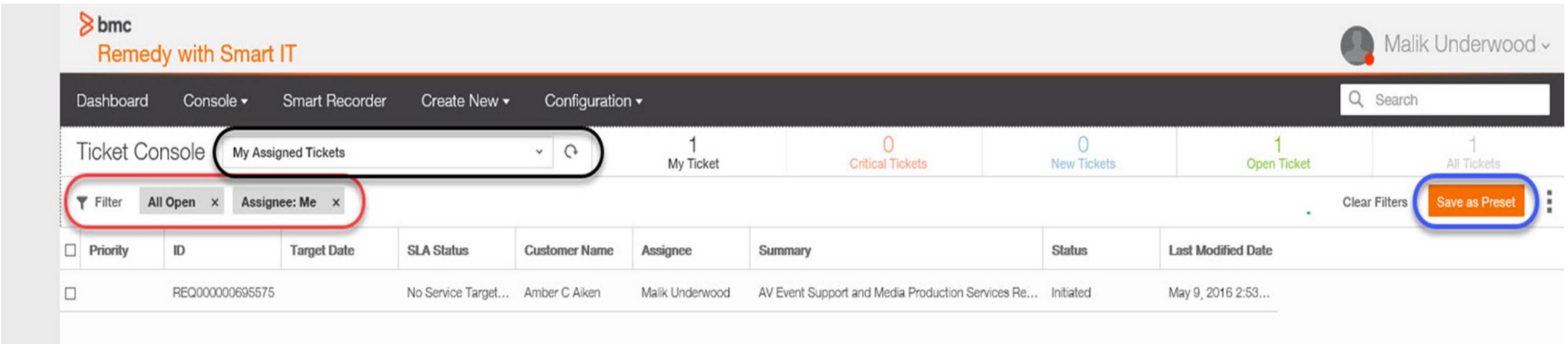


When you first log in you will be at the dashboard;

- 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



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.

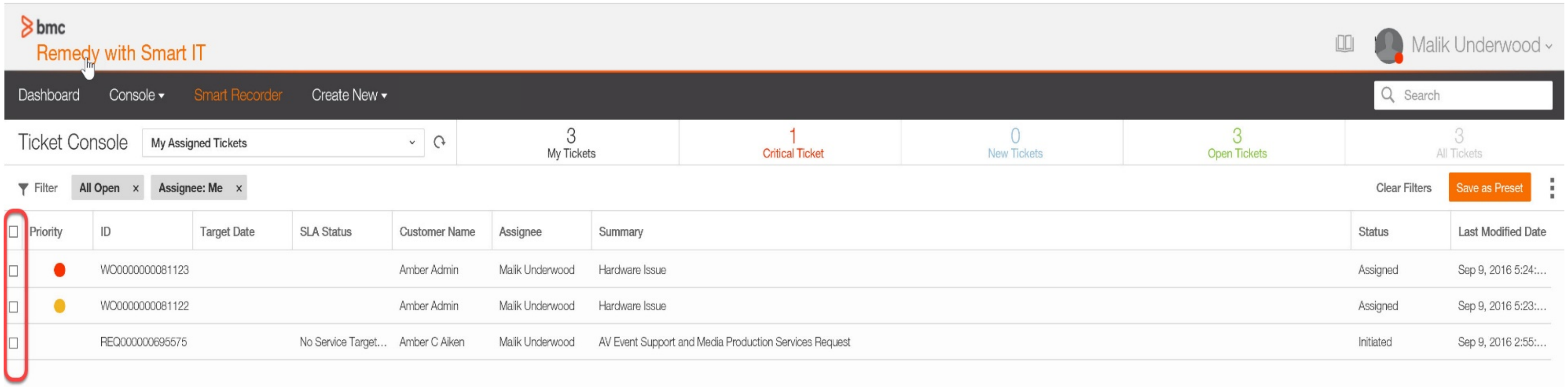
The Ticket Console provides a listing of Incident, Task and Service Request (Change and Work Order in a future release). This listing is based on the filter qualification. To view the details of a ticket, click anywhere on the row of that ticket.

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



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

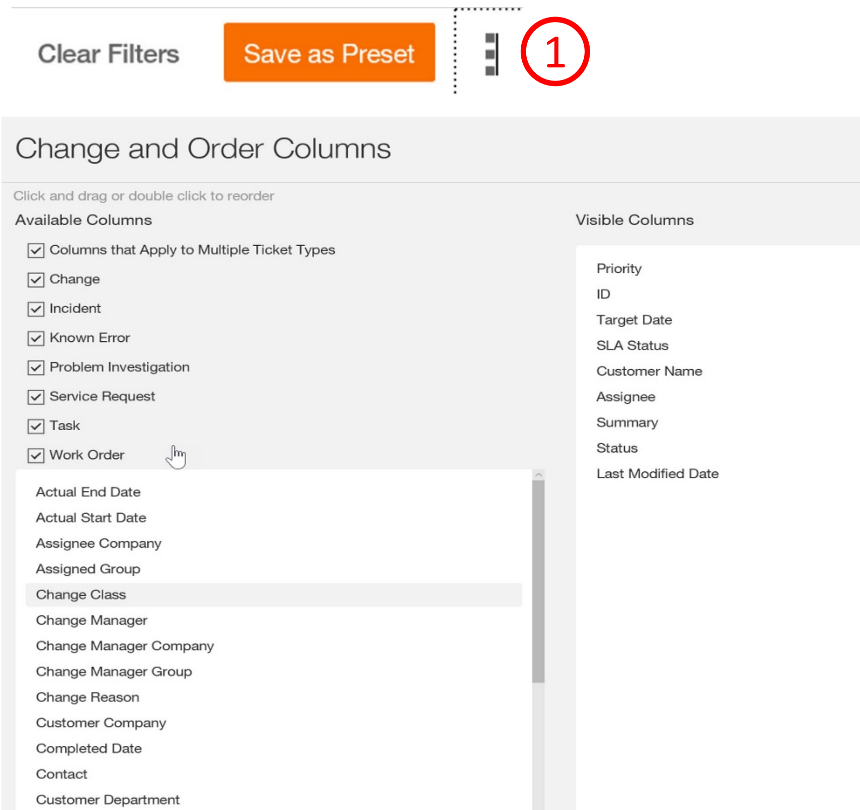
Some of the bulk action options available to you include:

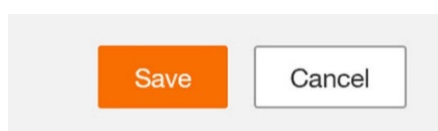
Update Status

- **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





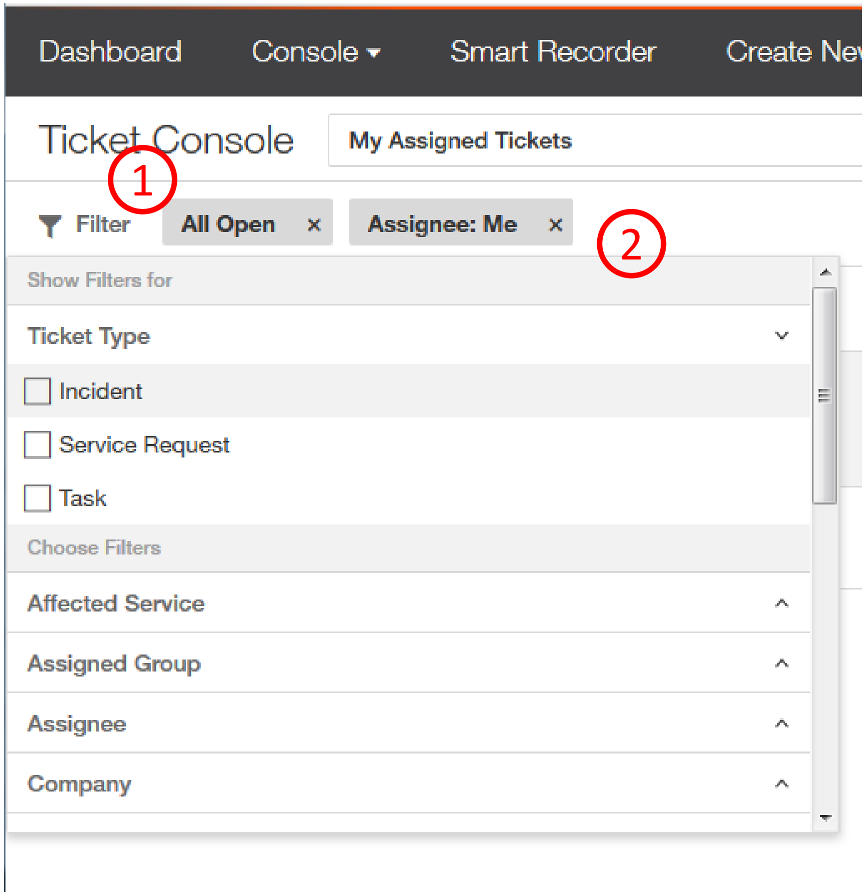
To add/remove column data on the console view, go to the top right side of the application and click on the 3 dots next to the Save as Preset button (#1).

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.

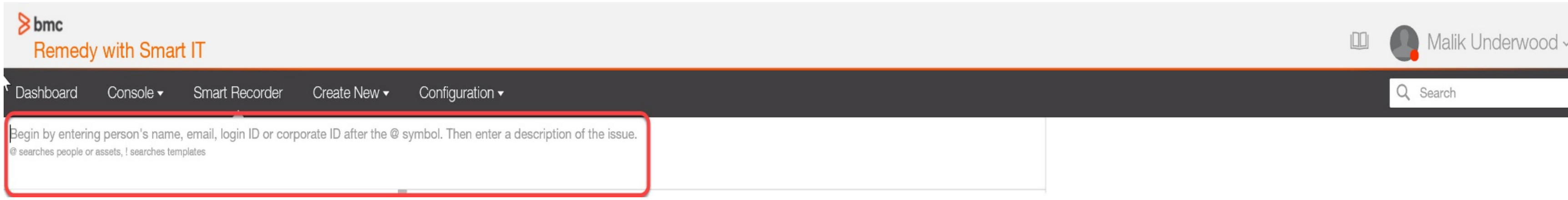
Console: Filter Qualifications



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

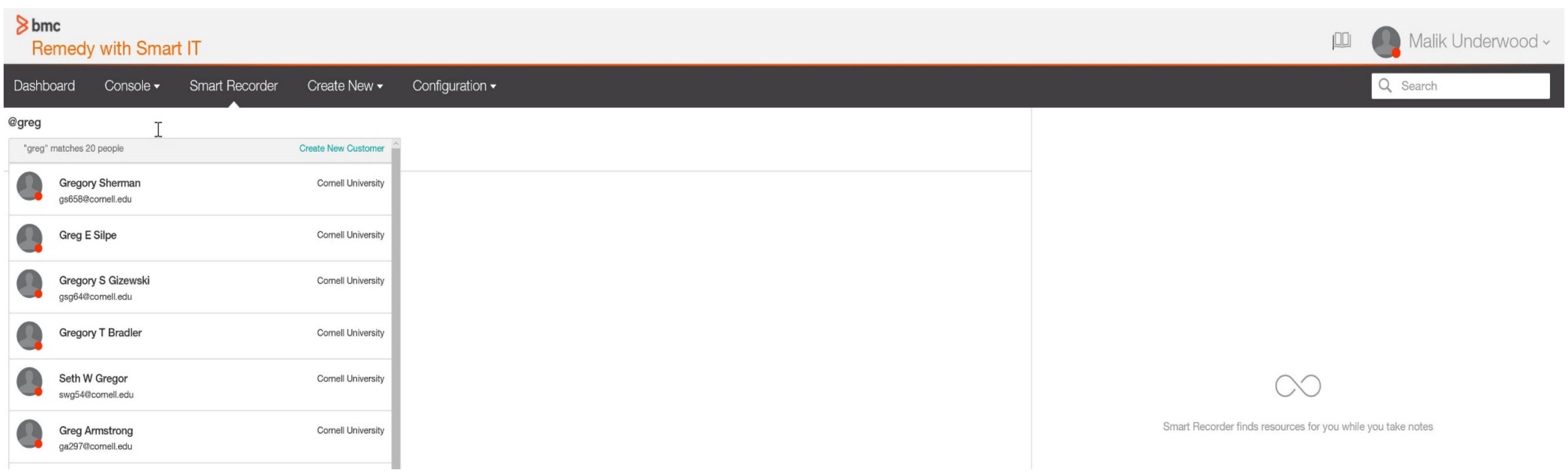
- Each filter type may have more than one selection. The arrows on the right side of the list will open or close that filter type. The example shows that Incident is selected. This will add only Incident ticket types to the current filter.
- You can select more than one selection within a filter type 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

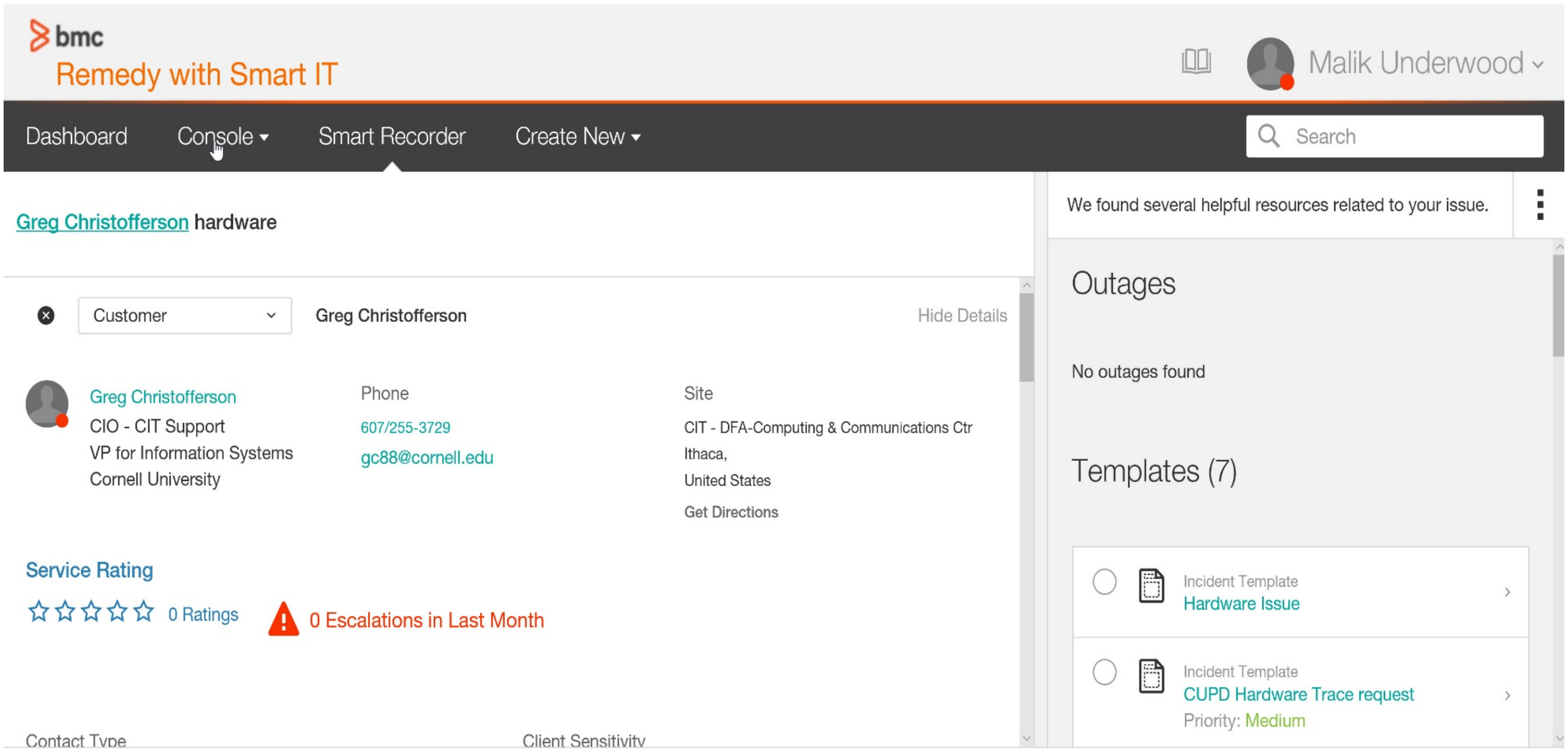


Smart Recorder uses a free form text entry field to help you focus on what the customer is saying, instead of filling out fields in a structured form. This way of creating a ticket helps you to capture information in real time, directly from the customer and in their own words

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.



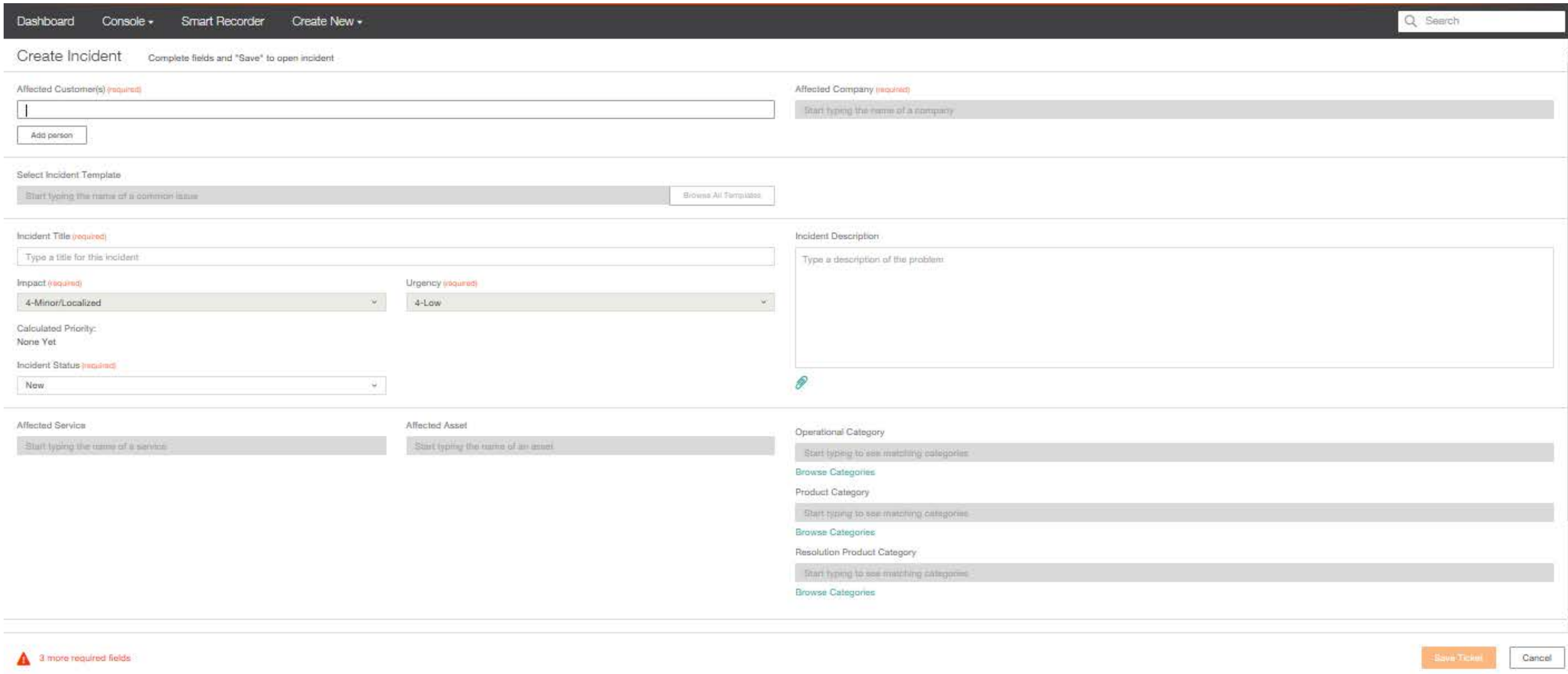
Smart Recorder: Creating a Ticket



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.

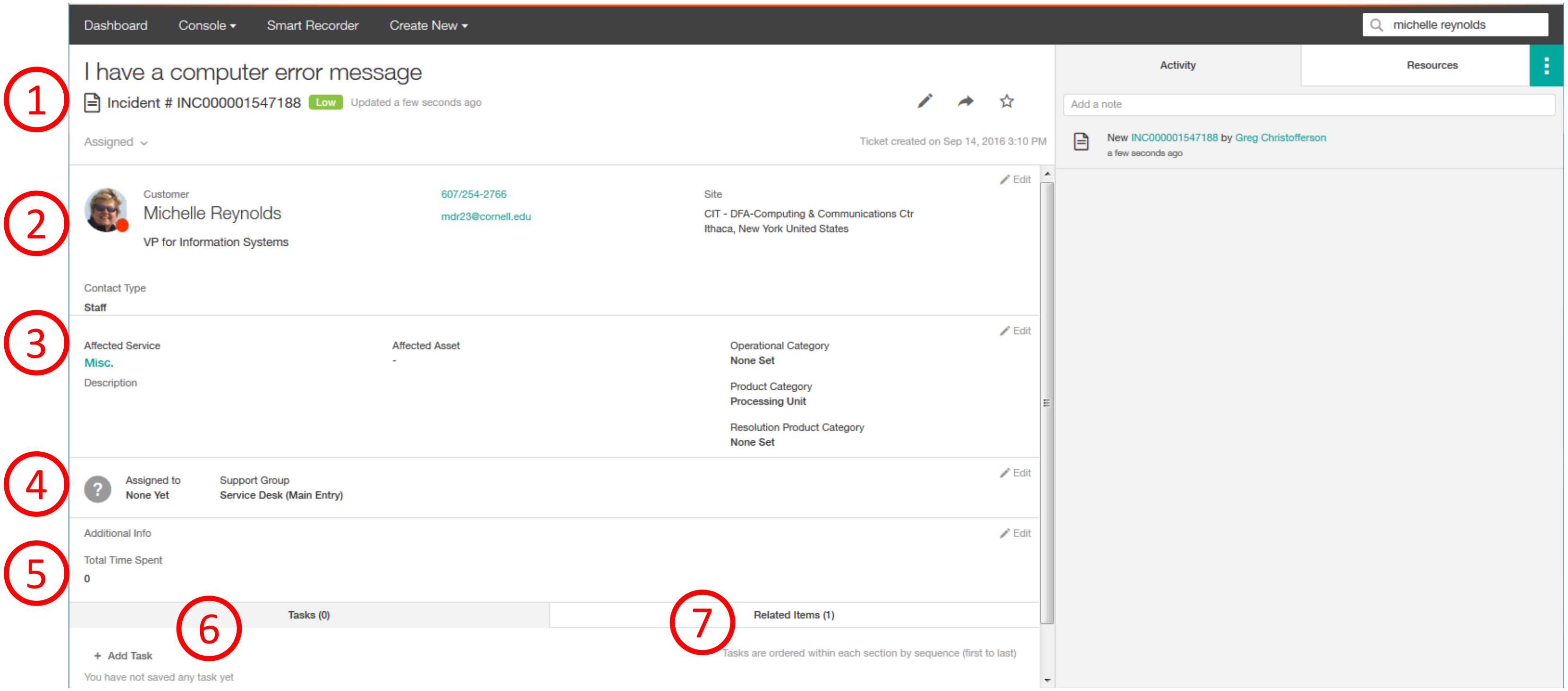
Create New



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.

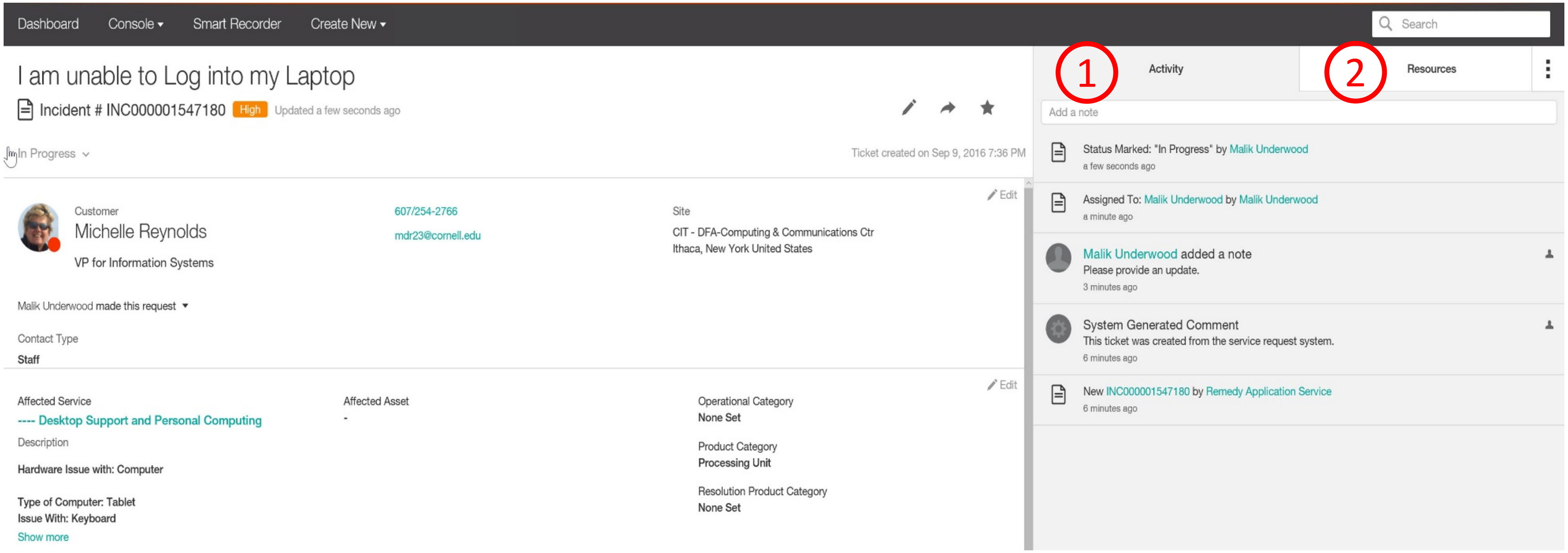
Ticket Details



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.

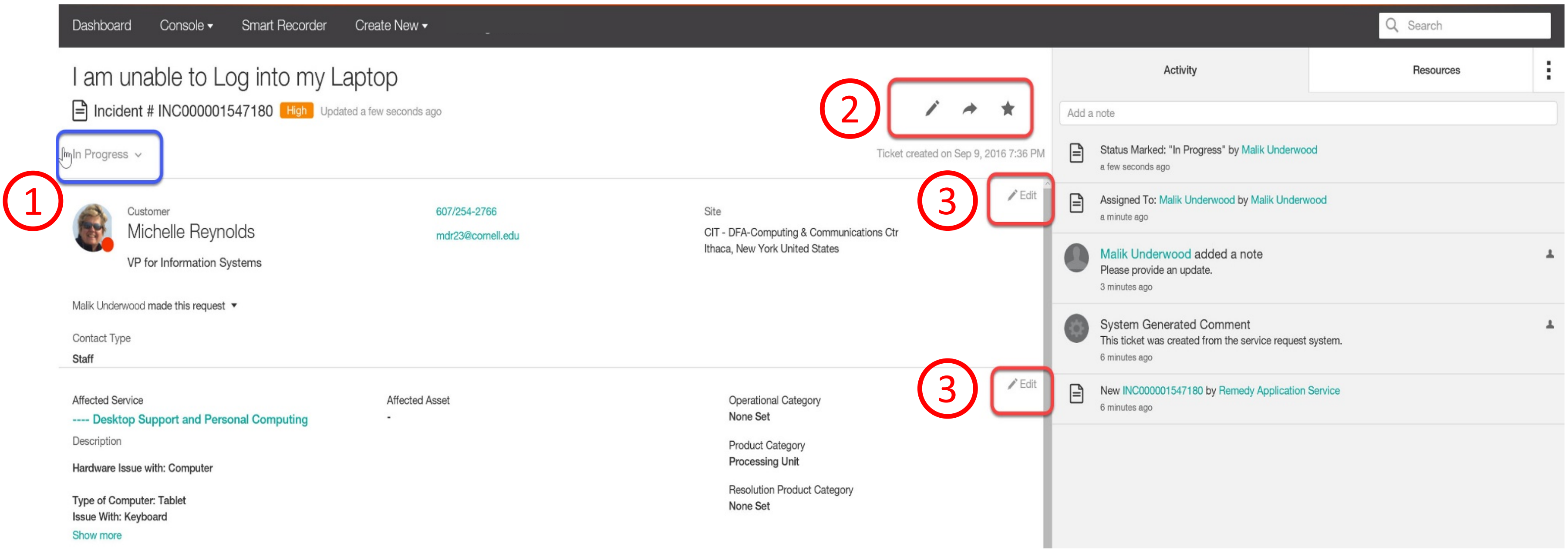
Ticket Details (cont)



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)



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 wont 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 then the classic view)
- Canceling a tickets now requires a status reason
- There is no Turbo Cancel
- There is no ticket Audit log
- Incidents 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.