**Create a Ticket**

* Click **Create** in the Incident Management Console
* Or, Click **New Incident** Under **Functions** on the left hand side

**Required Fields to Create Ticket**

|  |  |
| --- | --- |
| Customer  | Summary |
| Impact  | Urgency |
| Save and Verify (look at top of screen to see if there is an error message) | Assigned Group |

**Required Fields to Resolve a ticket**

* **ONLY done by Selecting Status as Resolved. Do NOT use the Resolve button.**

|  |  |
| --- | --- |
| Tier 1 Operational Category | Tier 1 Product Category |
| Reported Source | Assigned Group |
| Assignee | Status |
| Status Reason | Resolution field |

**Assigning a Ticket**

* In the incident management console: select the ticket then select “Quick actions” (located above the queue) and then “assign to me”
* Within the ticket: Select “Assign to me” in the “Quick Action” box on the right.

**Templates (aka Checklists)**

* Create a New Ticket
* Select the **Magnifying glass** to the right of the “Template” field
* Select the desired template from the pop-up window. (If you choose the wrong one, you will have to create a new ticket).
* Checklist will appear in the **Notes field**

**Work Detail** **(aka Ticket Details)**

* Use this section to write what occurred with the client
* If you use **More Details**,
	+ You can select if you want this item to be locked (un-editable) or unlocked (editable by **anyone else & yourself**)
	+ You can select if you want the View Access as Internal (Users of Remedy only) or Public (**viewable by the client AND Remedy will email it to the client**)
* Press **Add** to make your Work Info item part of the ticket
* To email a client within the ticket
	+ Create a new Work Info
	+ Type in your email to the client
	+ Select **Locked** as **No**
	+ Select **View Access** as **Public**

**Client’s Ticket History (only works for a client in the UF directory)**

* In a new ticket or an open ticket, select “Customer’s Incidents” in the “Quick Action” box on the right..
* This will open a new window, which will display the client’s ticket history.

**Ticket Relationships (Relationship** tab - right hand side)

* At the bottom of the **Relationship** tab, change **Search** to **Incident** and enter the Incident number of the second ticket.
* Select the magnifying glass.
* For **Duplicate of**: You should be in the ticket you want to mark as the duplicate
* For **Original of**: You should be in the ticket you want to be the original

**Ticket History**

* Viewing ticket creator
	+ Select the “Date/System” tab on the right-hand side
	+ The “Submitter” field will list the user who created the ticket
* View the last person to update the ticket
	+ Select the “Date/System” tab on the right-hand side
	+ The “Last Modified By” field will list the user who created the ticket
* Viewing work info history
	+ Select the “Work Detail” tab on the right-hand side
	+ There are four small icons listed at the top, select the last one which looks like a page with a clock on it.
	+ This will show you which user submitted each work info detail.

**To use your custom filter (in the Incident Management Console)**

* Select the ‘Filter By’ drop-down menu.
* A new option, ‘My Searches’ will be available.
* Your new filters will be listed there.
* Selecting on your desired filter will refresh the queue to display only what the filter specifies.

**Find Service Request Number**

* For a new ticket: Advanced Functions -> View Service Request from inside Incident Ticket
* For an open ticket:
	+ Put full Service Request number into Global Search box – REQ00000000XXXX
	+ Search for all tickets submitted by your client from Customer field in Incident Search screen

**Global Search Box**

* Put full Service Request number or Incident Number into Global Search Box (REQ000000000XXX or INC000000000XXX). The results will show both the Incident Number and the Service Request Number
* You can use a wild card search for an **Incident Number** **only**. To run a wild card search, you would type **%** and then the non-zero digits of the Incident.
* Can be used to search for knowledge base articles by entering any keyword that you are searching for

**Knowledge Base Articles**

* Please note that all Knowledge Base Articles will be visible to all individuals who use Remedy.
* If you are creating an article that is specific to your group, please have the title of the article start with 2-3 letter acronym of your group name.
* For articles that can benefit all support desk users, there is no need for an acronym.

**Ticket Referrals**

* If referring a ticket to the Help Desk, please refer to the **HD Administrative Staff** Support Group.
* If you would like to refer something to Enterprise Systems, please refer to the Help Desk **HD Administrative Staff** Support Group and we will refer it for you as per our agreement with Enterprise Systems.
* If you would like to refer something to Computing & Networking Services, please refer it to the **CNS** Support Group.