

Remedy ITSM Service Request Management Quick Start Guide

For use by **customers of IT services**
with Remedy ITSM at **Missouri S&T**

Version 1.5

December 11, 2013

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Revision History

Version	Date Modified	Author	Modification
1.0	11/15/12	Melissa Deatz	First Draft
1.2	12/27/12	Melissa Deatz	Attachment file size limitation updated to 60 MB
1.3	1/4/13	Melissa Deatz	Renamed document title and added Version, Date, Revision History and Audience
1.4	1/9/13	Lauren Oswald	Updated style and format to more clearly identify intended audience (support staff vs customers) and specific area within Remedy (ie. Service Request Management)
1.5	12/11/13	Karen Kunkle	Updated content for Remedy version 8.1

1.0 Getting Started with Remedy's Service Request Management

1.1 Logging In

1. Open your browser (Internet Explorer, Mozilla Firefox, Safari) and navigate to request.umsystem.edu.
2. Ensure pop-ups are allowed for this site.
3. At the Remedy login page, enter your User ID (SSO) and password.
4. Click **Log In**.



Remedy Login

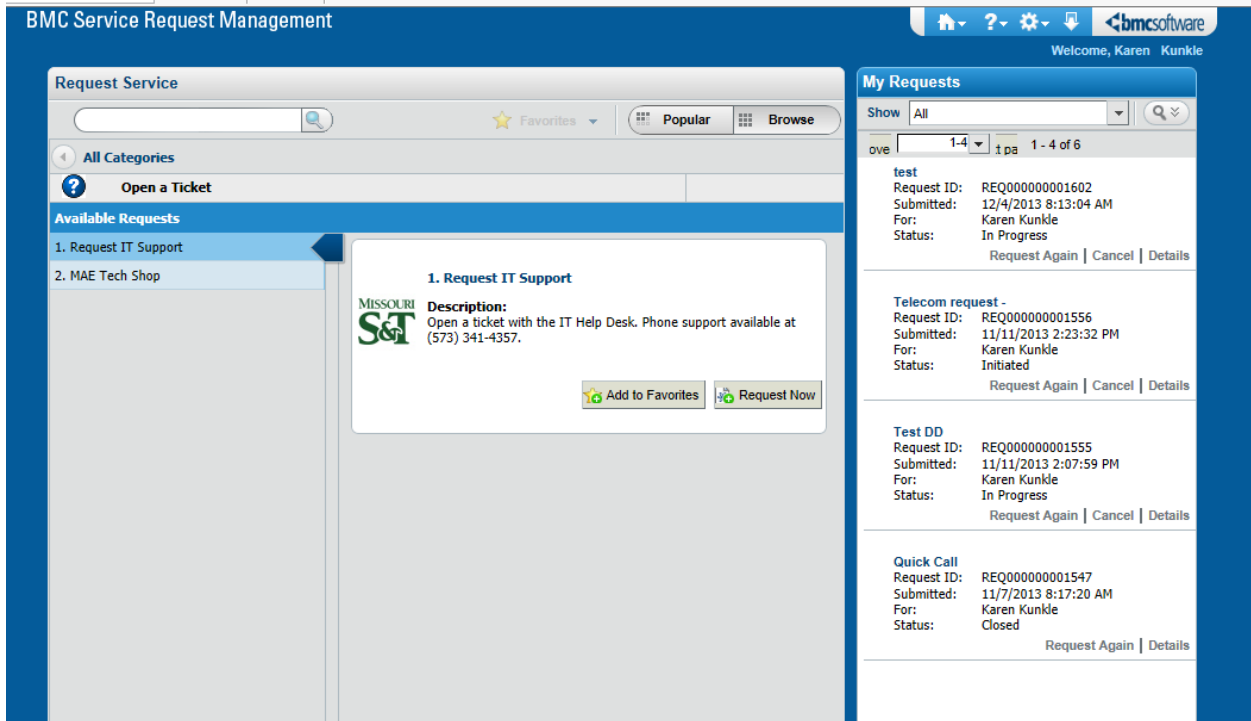
Please log in.

User Name

Password

Log in with your University user ID and password.
Problems? [Enter your domain](#) or [visit the login help page](#).

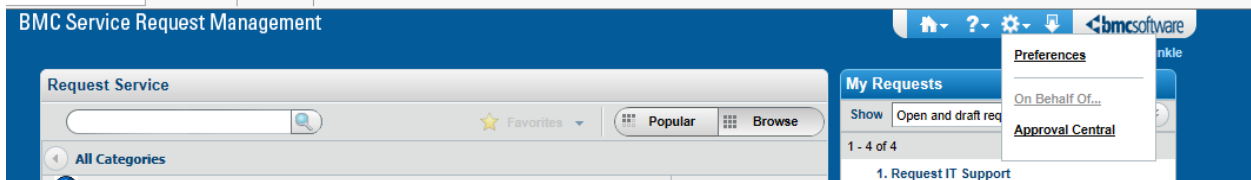
When you log in for the first time, the “Request Service” window appears.



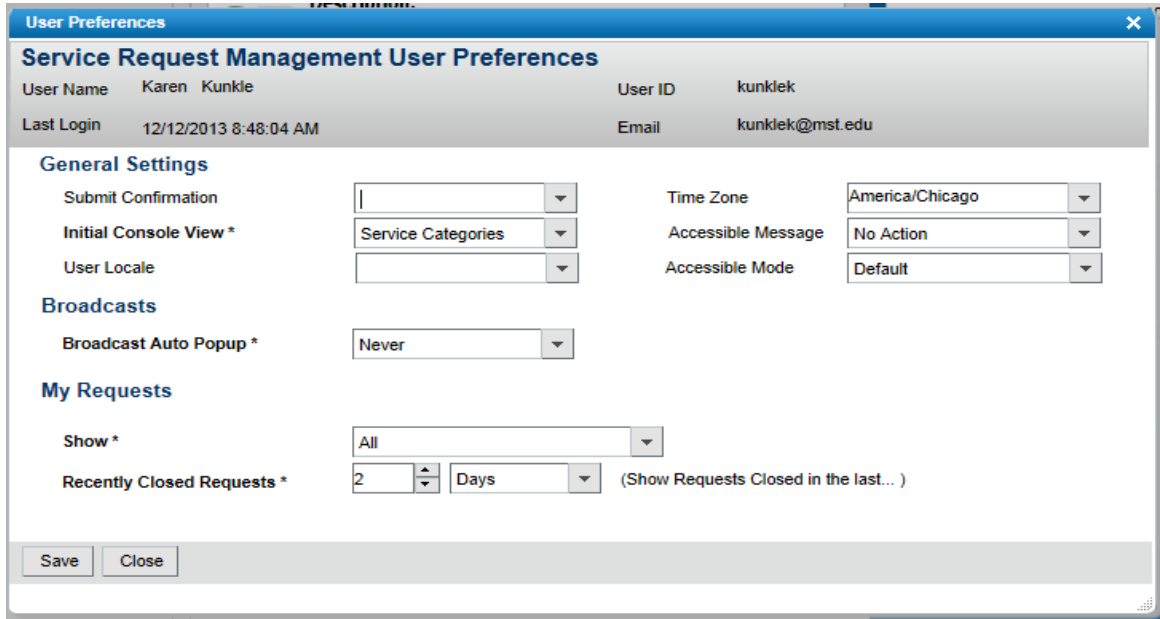
1.2 Setting Request Entry Console Preferences

To customize the Request Entry Console:

1. Click **Settings** and select **Preferences**.



The Service Request Management User Preferences window appears.



- Under the “General Settings” panel, select your option for “Submit Confirmation”. Select **Yes** to have a confirmation dialog box each time you submit. Select **No** to submit without asking for confirmation.

General Settings

Submit Confirmation

Initial Console View *

User Locale

▼
No
Yes
(clear)

- For “Initial Console View”, select **Popular Categories** or **Service Categories**.

General Settings

Submit Confirmation

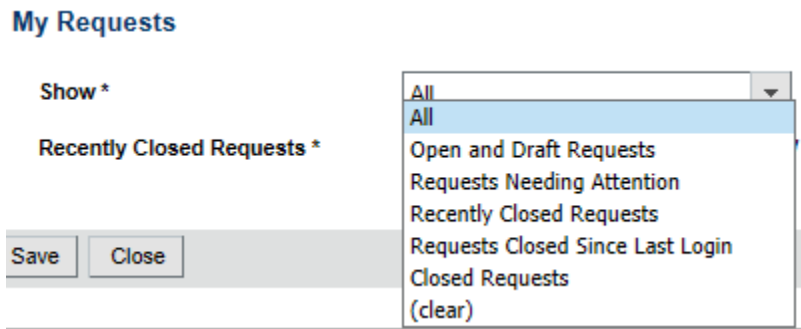
Initial Console View *

User Locale

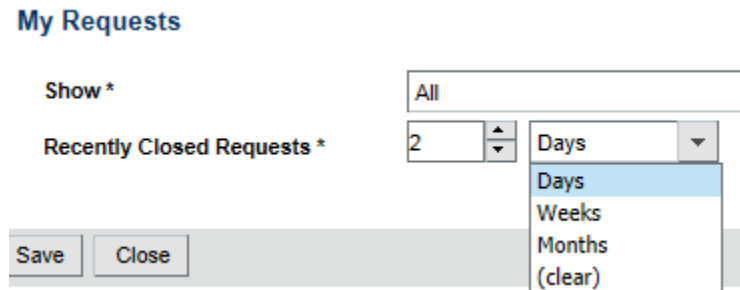
Broadcasts

▼
Service Categories
Popular Services
Service Categories
(clear)

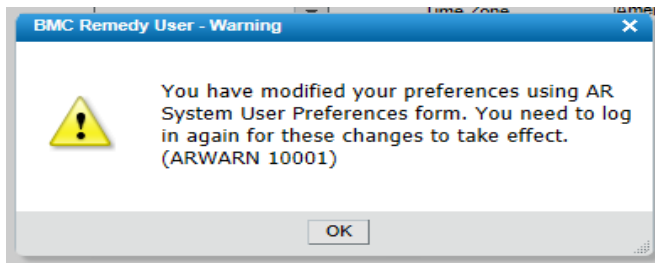
- Under the "My Requests" panel, select the option you want to view when you open SRM under "Show". **All** is the default option.



- Select the number of days, weeks or, months you want to include in "Recently Closed Requests".



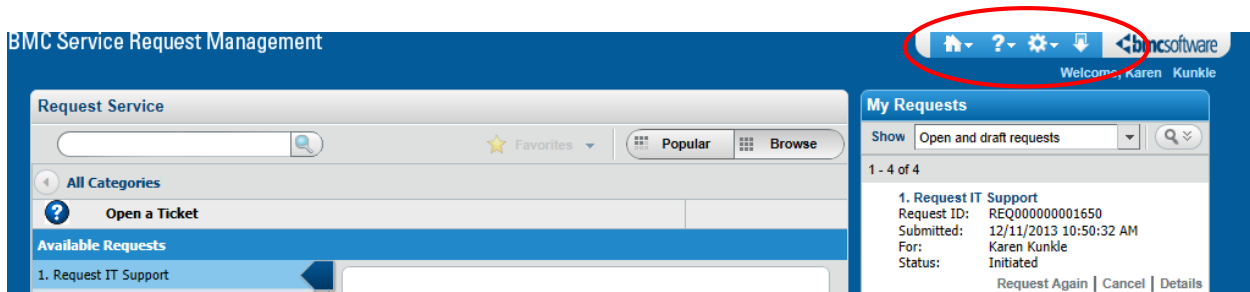
- Click **Save** when finished.







A message appears stating your preferences have been modified. Click OK

Note: You must log out and log back in for the changes to take effect.

1.3 Navigating Service Request Management

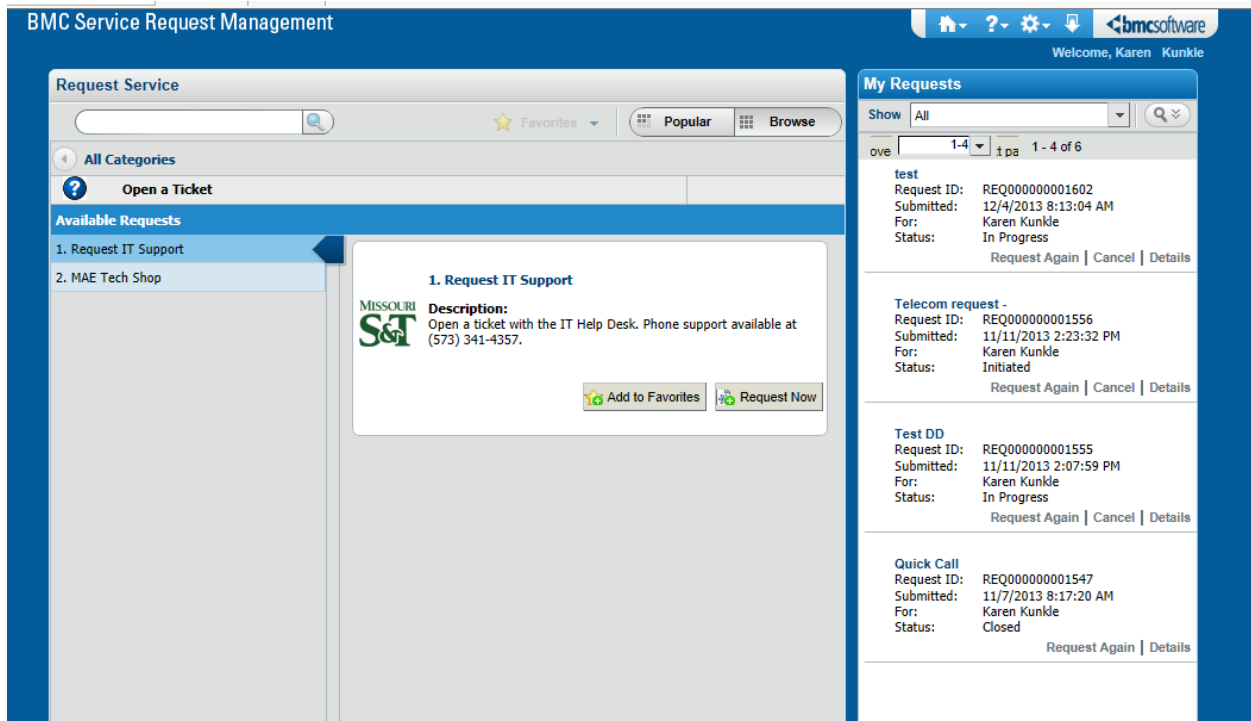


Home button 	Takes you to the SRM home page or the IT home page
Help button 	Provides documentation about the Request Entry Console and link to Surveys
Settings button 	Takes you to Preferences
Logout button 	Logs user out of the Remedy system

2.0 Submitting a Service Request

To submit a request:

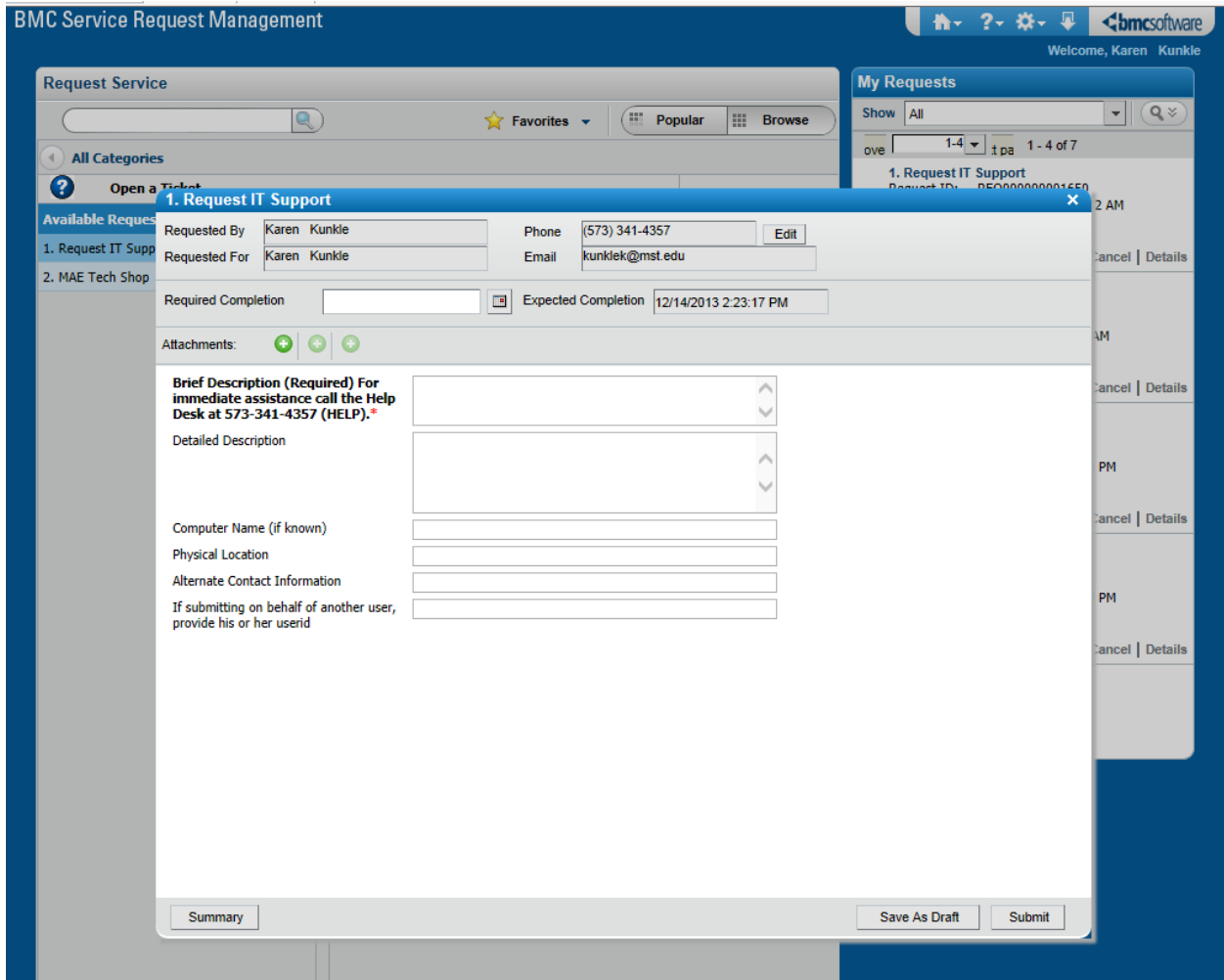
1. From the “Available Requests” window, select the **Request IT Support** and click Request Now button.




The screenshot displays the BMC Service Request Management interface. The top navigation bar includes a search bar, navigation icons (Home, Help, Settings, Logout), and the BMC Software logo. The user is logged in as Karen Kunkle.

The main content area is divided into two primary sections:

- Request Service:** This section features a search bar, a 'Favorites' dropdown, and 'Popular' and 'Browse' buttons. Below these are 'All Categories' and an 'Open a Ticket' button. The 'Available Requests' list shows:
 1. Request IT Support
 2. MAE Tech Shop
 The 'Request IT Support' item is selected, and its details are shown in a pop-up window:
 - 1. Request IT Support**
 - MISSOURI S&T** logo
 - Description:** Open a ticket with the IT Help Desk. Phone support available at (573) 341-4357.
 - Buttons: **Add to Favorites** and **Request Now**
- My Requests:** This panel shows a list of requests with the following details:
 - test**: Request ID: REQ00000001602, Submitted: 12/4/2013 8:13:04 AM, For: Karen Kunkle, Status: In Progress. Actions: Request Again | Cancel | Details
 - Telecom request -**: Request ID: REQ00000001556, Submitted: 11/11/2013 2:23:32 PM, For: Karen Kunkle, Status: Initiated. Actions: Request Again | Cancel | Details
 - Test DD**: Request ID: REQ00000001555, Submitted: 11/11/2013 2:07:59 PM, For: Karen Kunkle, Status: In Progress. Actions: Request Again | Cancel | Details
 - Quick Call**: Request ID: REQ00000001547, Submitted: 11/7/2013 8:17:20 AM, For: Karen Kunkle, Status: Closed. Actions: Request Again | Details



2. At the "Provide Information" window, enter the following data:
 - a. **Brief Description** (Required)
 - b. **Detailed Description**
 - c. **Computer Name** - The name in which your computer is registered. There should be a sticker on your computer with the computer name.
 - d. **Physical Location** – Where is the computer physically located? Include the building and room number.
 - e. **Alternate Contact Information** – Do you have another phone number where you can be reached?
 - f. **If submitting on behalf of another user, provide his or her User ID (SSO).**
3. If you have an attachment to add, click  to open the "Attachments" window.

1. Request IT Support

Requested By: Karen Kunkle Phone

Requested For: Karen Kunkle Email

Required Completion: [] Expected

Attachments: + + +

Brief Description (Required) For immediate assistance call the Help Desk at 573-341-4357 (HELP).*

Add Attachment

Attachment 1 | Browse...

Status

OK Cancel

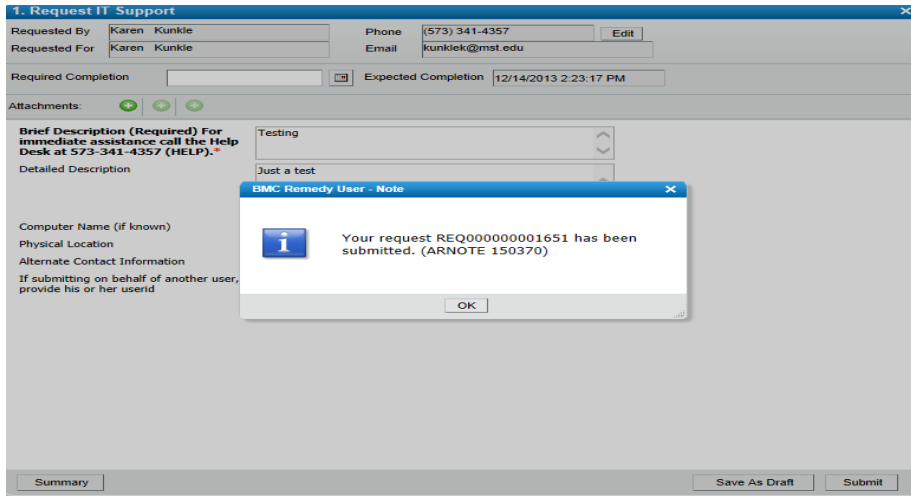
4. Click **Browse** and select the document you want to attach.
5. Click **OK**. The document attaches and the “Provide Information” window returns.

Note: You can only delete an attachment if it has not been submitted. Also the file size is limited to 60 MB and to file types that are allowed by the Outlook Exchange Server.

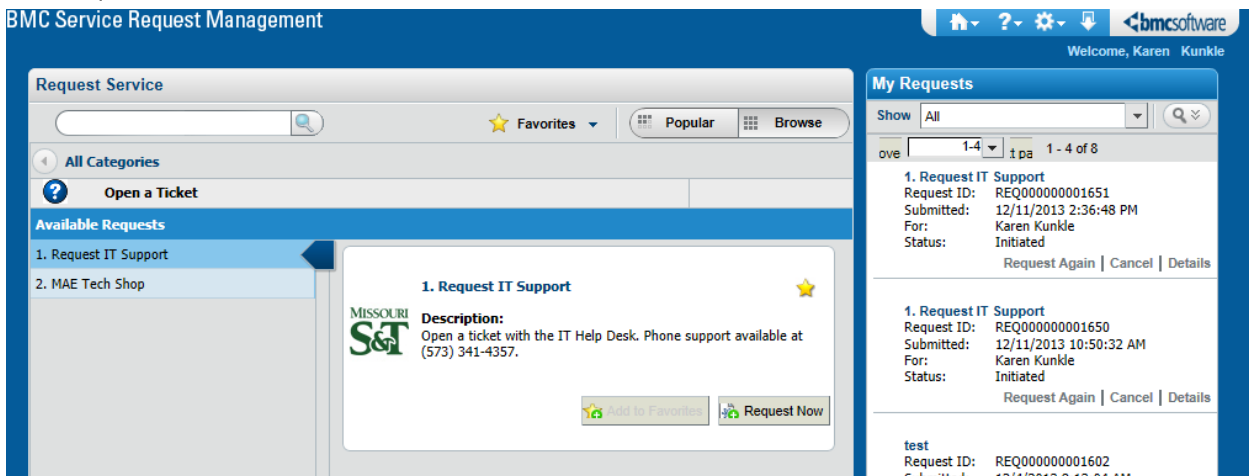
6. Click **Submit**.

Note: If you are not ready to submit the service request, you can click on the **Save As Draft** button and then return at a later time to update and submit the request.

Remedy ITSM - Service Request Management - Quick Start Guide (for customers)



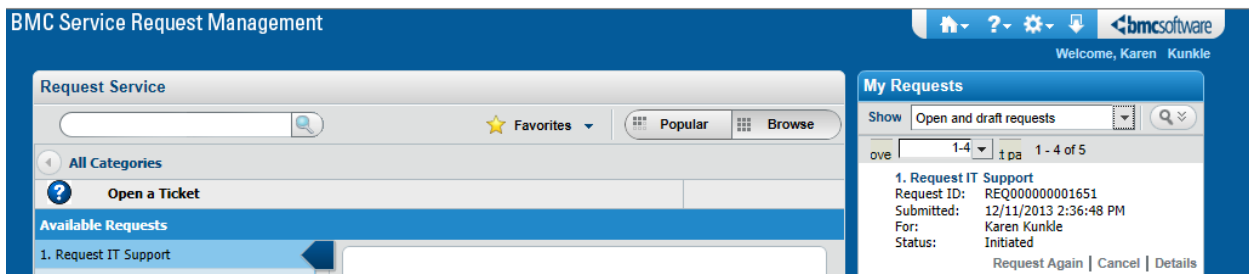
Upon submission, you will see a message stating that your request has been submitted, click OK and you will be returned to the main menu. The “My Requests” window will appear on the right, displaying your new request.



3.0 Updating a Service Request

To update a service request:

1. In the “Show” field, select **Open and draft requests**.



2. Select the service request you want to update. Click on it to open the “Details” option.


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The screenshot shows the 'Request Details' window with the 'Initiated' status selected. The 'General Information' section contains the following details:

Request Status:	Initiated
ID:	REQ000000001651
Title:	1. Request IT Support
Turnaround Time:	3 Days
Submit Date:	12/11/2013 2:36:48 PM
Required Completion:	
Expected Completion:	12/14/2013 2:23:17 PM
Requested By:	Karen Kunkle
Requested For:	Karen Kunkle
Company:	ROLLA
Phone:	(573) 341-4357
Email:	

The 'Activity Log' section is empty, with a text input field containing the placeholder '<type your activity log text here>' and a green plus icon to add an update. Below the text field is a file upload field with the placeholder '<File Name>' and a paperclip icon.

At the bottom of the window, there are buttons for 'Request Again', 'Cancel Request', 'Close', and 'Print'.

3. Enter updates in the Activity Log field and click the  to add update.

Remedy ITSM - Service Request Management - Quick Start Guide (for customers)

Request Details

Details | Additional Details | Process View

Draft | Waiting Approval | **Initiated** | In Progress | Completed | Closed

General Information

Request Status: Initiated
ID: REQ000000001651
Title: 1. Request IT Support
Turnaround Time: 3 Days
Submit Date: 12/11/2013 2:36:48 PM
Required Completion:
Expected Completion: 12/14/2013 2:23:17 PM
Requested By: Karen Kunkle
Requested For: Karen Kunkle
Company: ROLLA
Phone: (573) 341-4357
Email:

Activity Log

12/11/2013 3:04:41 PM ; Karen Kunkle (kunklek)
Test

<type your activity log text here>
<File Name>

Request Again | Cancel Request | Close | Print

4. Click **Close**. You are returned to the main menu where you may log out.

BMC Service Request Management

Welcome, Karen Kunkle

Request Service

Search | Favorites | Popular | Browse

All Categories | Open a Ticket

Available Requests

- 1. Request IT Support
- 2. MAE Tech Shop

1. Request IT Support

MISSOURI S&T

Description: Open a ticket with the IT Help Desk. Phone support available at (573) 341-4357.

Add to Favorites | Request Now

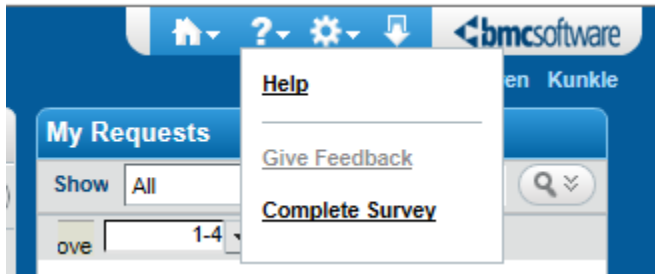
My Requests

Show All | 1-4 | 1 pa 1 - 4 of 8

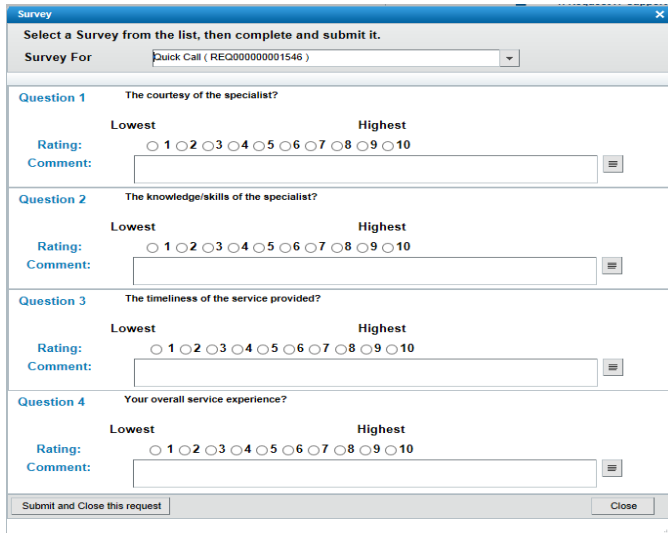
- 1. Request IT Support**
Request ID: REQ000000001651
Submitted: 12/11/2013 2:36:48 PM
For: Karen Kunkle
Status: Initiated
Request Again | Cancel | Details
- 1. Request IT Support**
Request ID: REQ000000001650
Submitted: 12/11/2013 10:50:32 AM
For: Karen Kunkle
Status: Initiated
Request Again | Cancel | Details
- test**
Request ID: REQ000000001602
Submitted: 12/4/2013 8:13:04 AM
For: Karen Kunkle
Status: In Progress
Request Again | Cancel | Details

4.0 Answering Surveys

1. From the **Help** button, click **Complete Survey** to open the “Survey” window.



2. Select a survey from the drop-down list.

A screenshot of the 'Survey' window. The window title is 'Survey' and it contains the instruction 'Select a Survey from the list, then complete and submit it.' Below this, there's a 'Survey For' dropdown menu showing 'Quick Call (REQ000000001546)'. The survey consists of four questions, each with a rating scale from 1 to 10 and a comment field. The questions are: 'Question 1: The courtesy of the specialist?', 'Question 2: The knowledge/skills of the specialist?', 'Question 3: The timeliness of the service provided?', and 'Question 4: Your overall service experience?'. At the bottom of the window, there are 'Submit and Close this request' and 'Close' buttons.

3. Enter your responses to the questions.
4. Perform one of the following actions:
 1. Click **Submit and Close this request** to save your answers to the survey and complete the service request.

Or

 2. If you do not want to complete the survey at this time, click on **Close**