Missouri University of Science and Technology

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

Table of Contents

Revision History

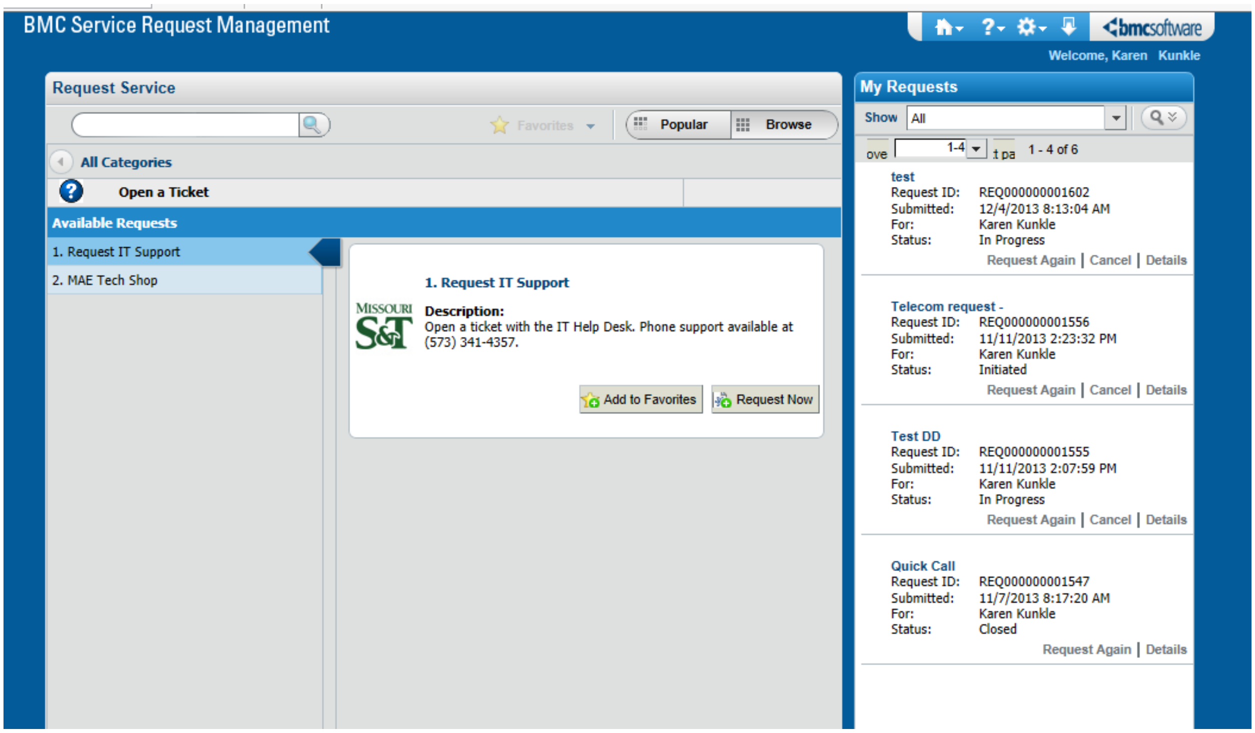
Version	Date Modified	Author	Modification
1.0	11/15/12	Melissa Deatz	First Draft
1.2	12/27/12	Melissa Deatz	Attachment file size limitation updated to 60 MB
1.3	1/4/13	Melissa Deatz	Renamed document title and added Version, Date, Revision History and Audience
1.4	1/9/13	Lauren Oswald	Updated style and 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**.

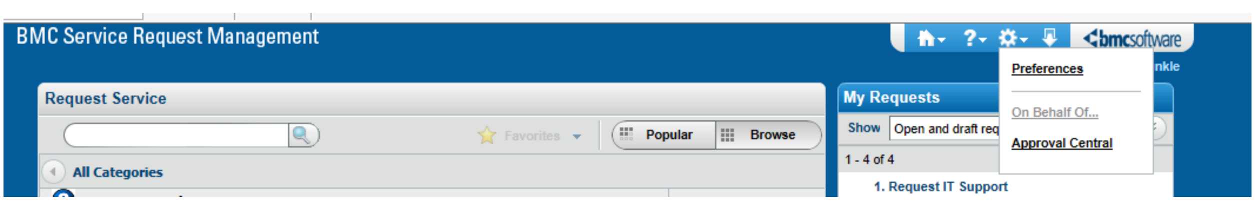
When you log in for the first time, the "Request Service" window appears.



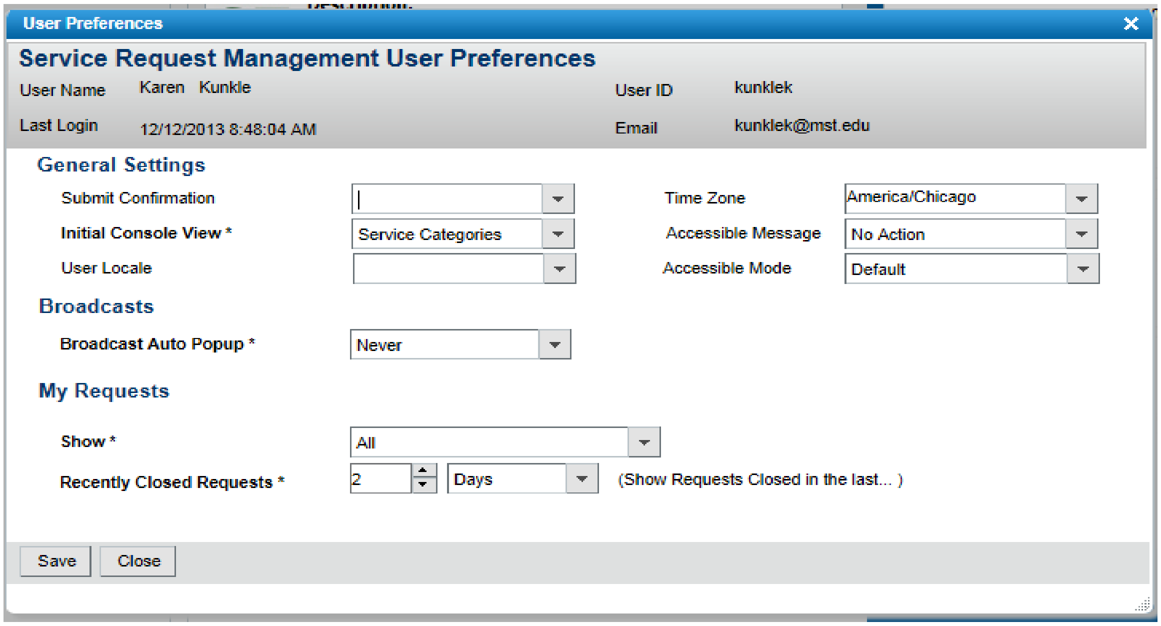
1.2 Setting Request Entry Console Preferences

To customize the Request Entry Console:

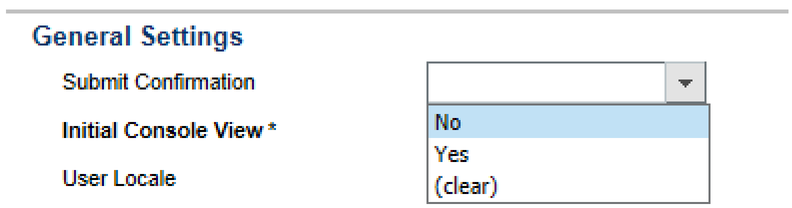
1. Click **Settings** and select **Preferences**.



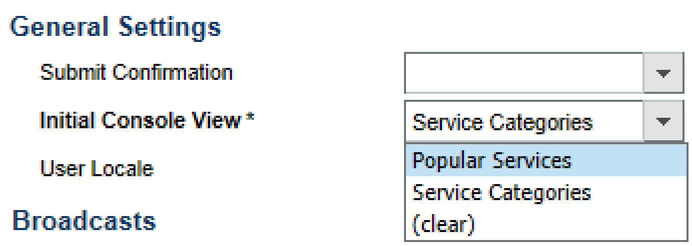
The Service Request Management User Preferences window appears.



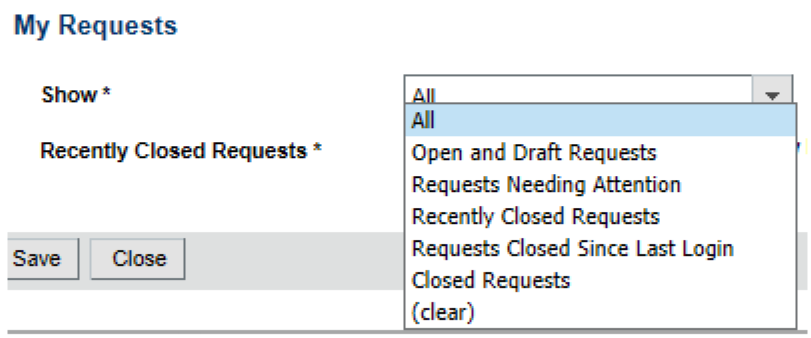
2. Under the "General Settings" panel, select your option for "Submit Confirmation". Select **Yes** to have a confirmation dialog box each time you submit. Select **No** to submit without asking for confirmation.



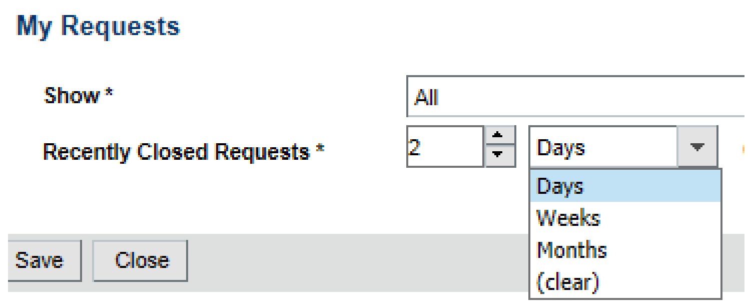
3. For "Initial Console View", select **Popular Categories** or **Service Categories**.



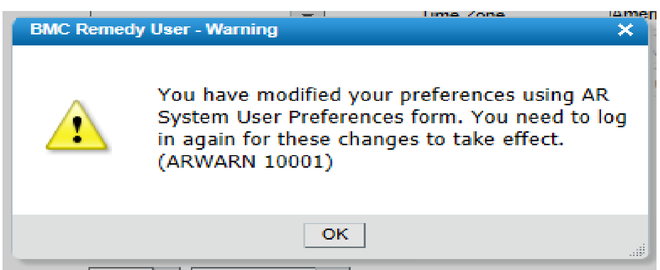
4. Under the" My Requests" panel, select the option you want to view when you open SRM under "Show". **All** is the default option.



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



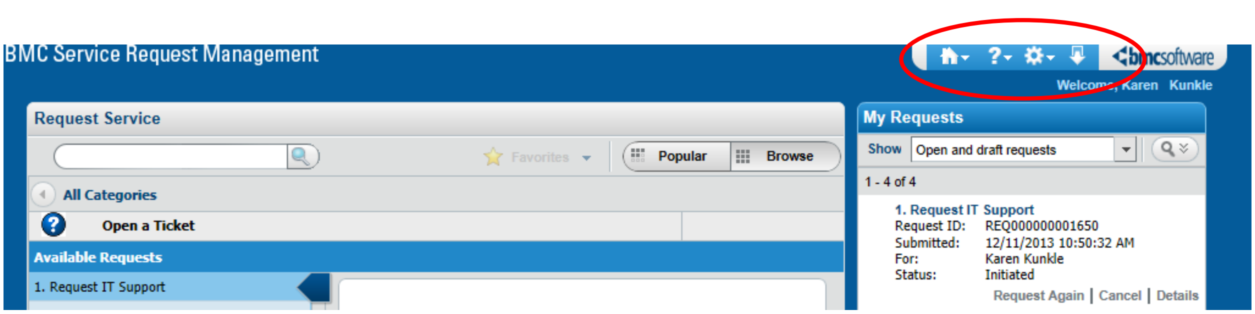
6. Click **Save** when finished.



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

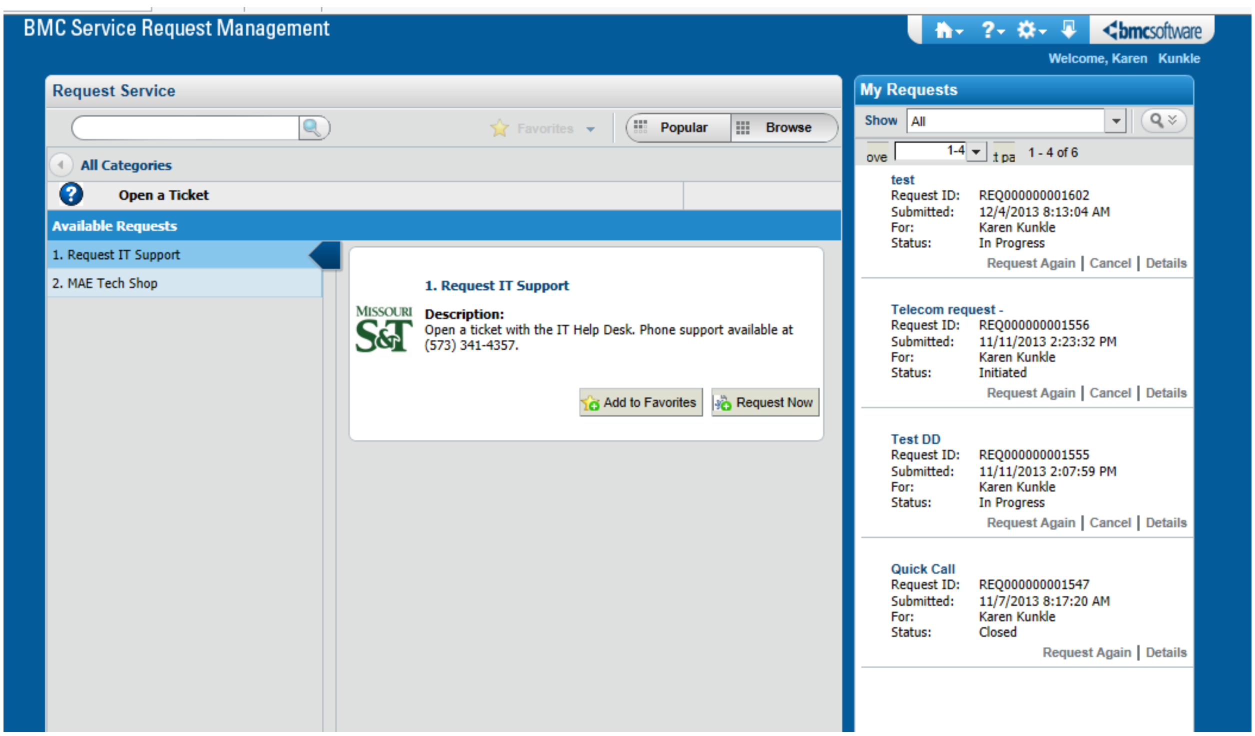


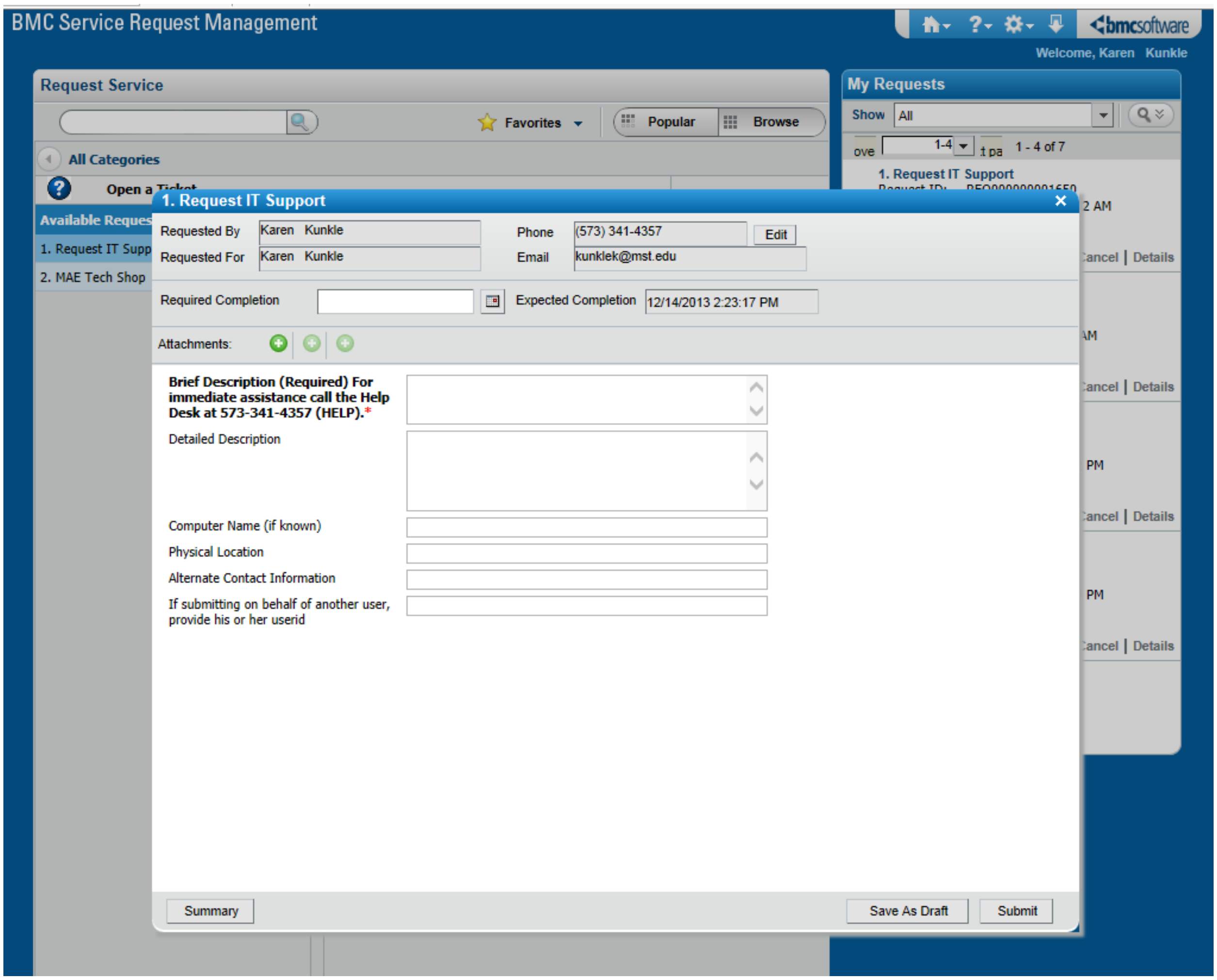
Home button	Takes you to the SRM home page or the IT home page
Help button	Provides documentation about the Request Entry Console and link to Surveys
Settings button	Takes you to Preferences
Logout button	Logs user out of the Remedy system

2.0 Submitting a Service Request

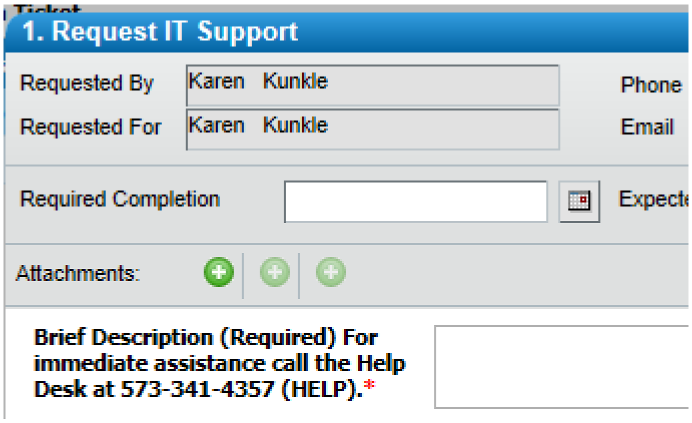
To submit a request:

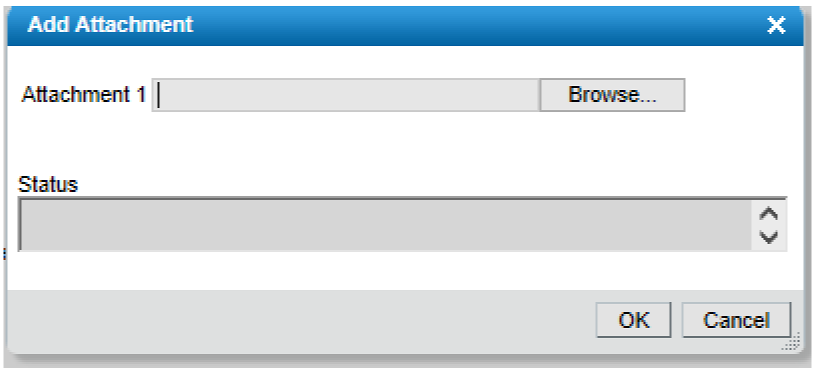
1. From the “Available Requests” window, select the **Request IT Support** and click Request Now button.





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.



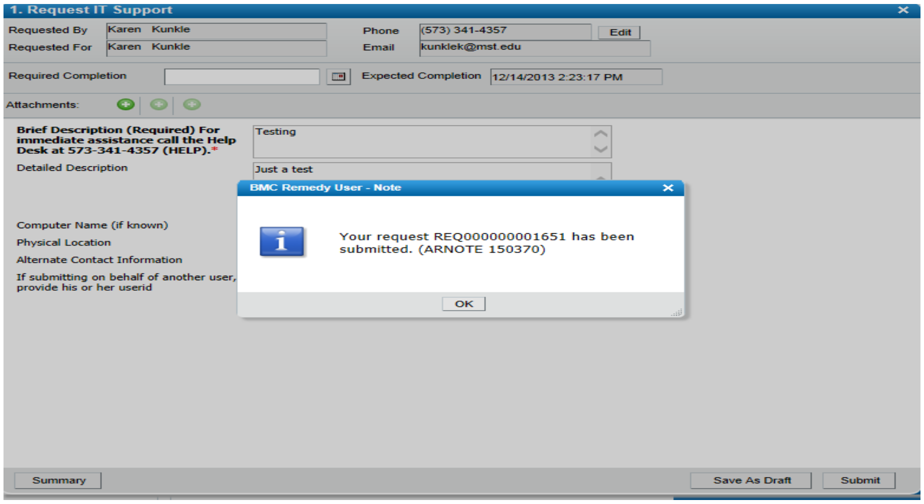


4. Click **Browse** and select the document you want to attach.
5. Click **OK**. The document attaches and the "Provide Information" window returns.

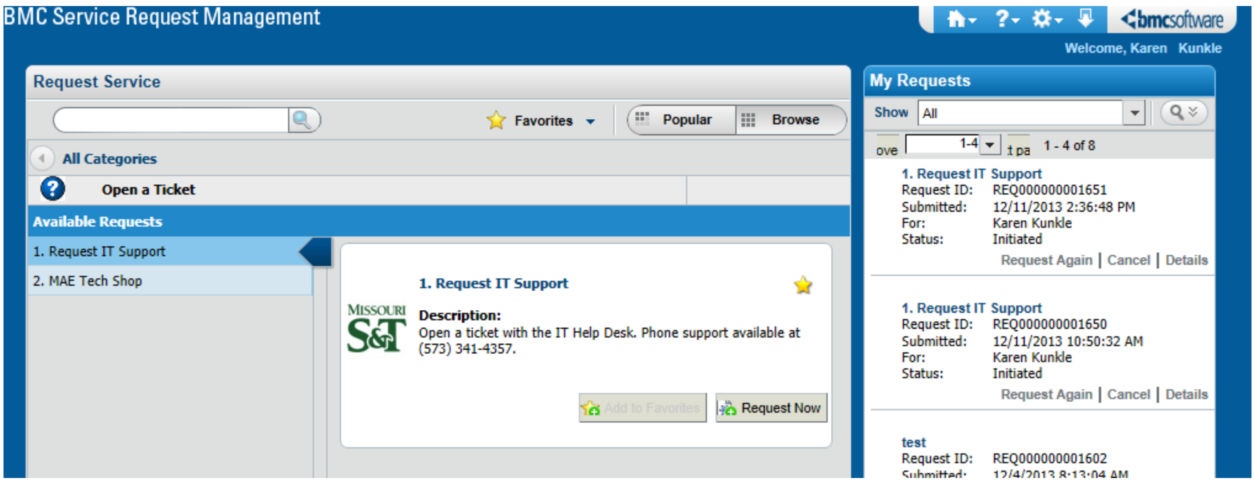
Note: You can only delete an attachment if it has not been submitted. Also the file size is limited to 60 MB and to file types that are allowed by the Outlook Exchange Server.

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.



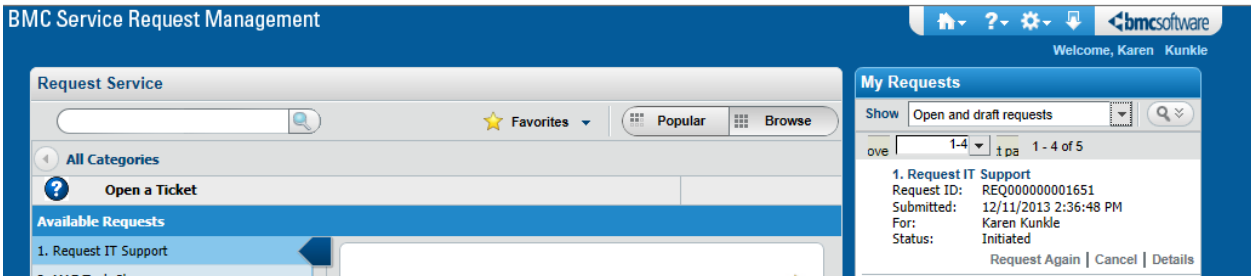
Upon submission, you will see a message stating that your request has been submitted, click OK and you will be returned to the main menu. The "My Requests" window will appear on the right, displaying your new request.



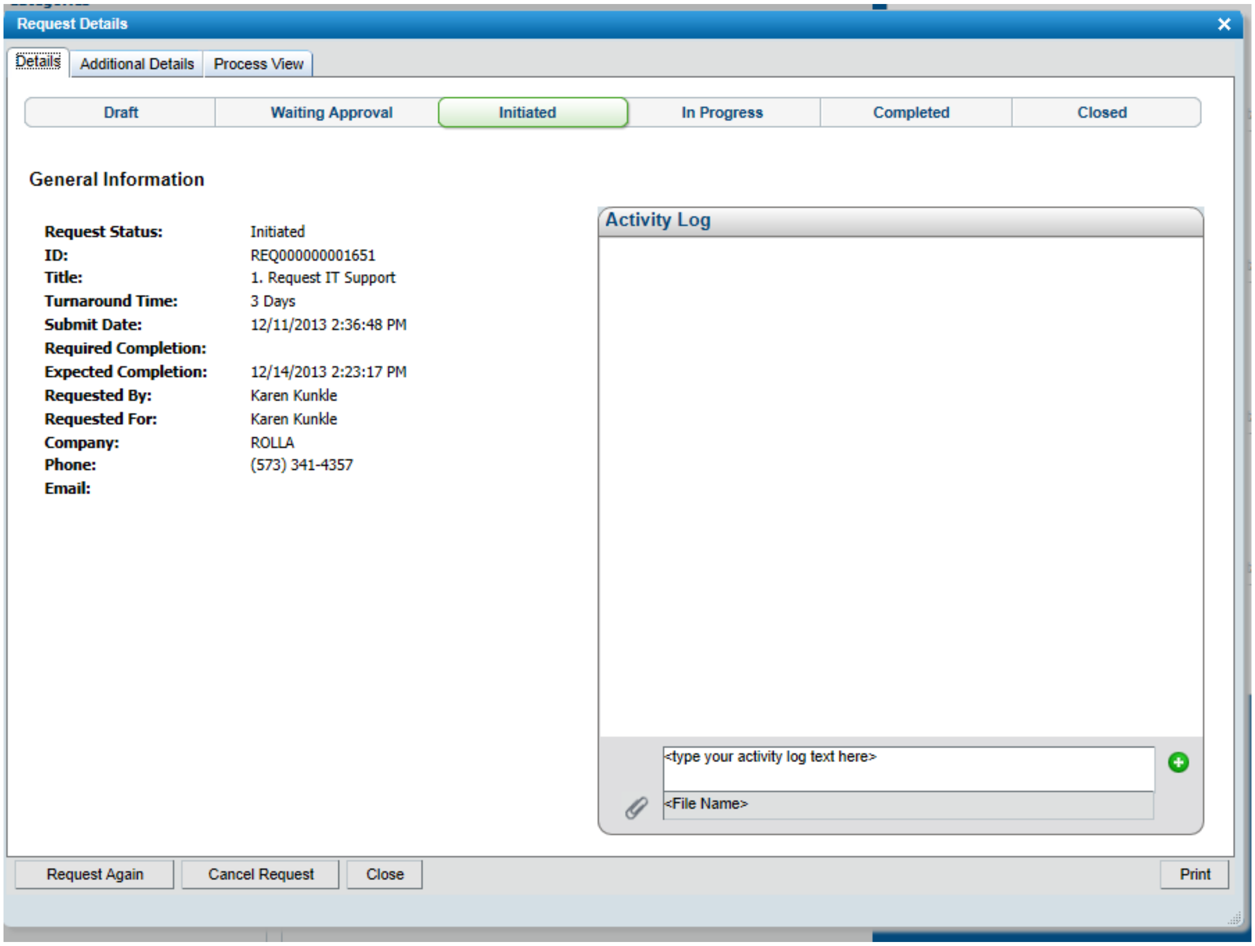
3.0 Updating a Service Request

To update a service request:

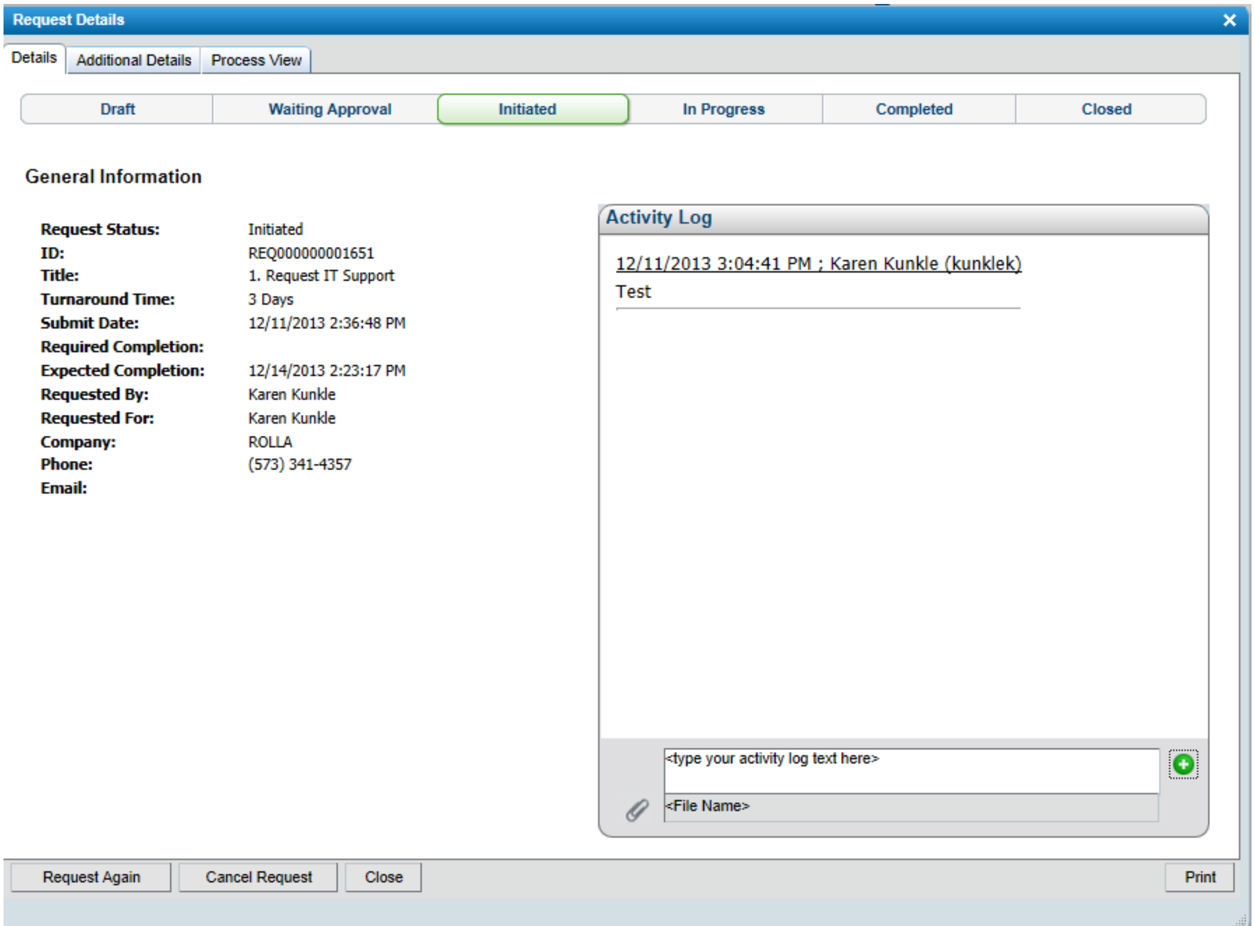
1. In the "Show" field, select **Open and draft requests**.



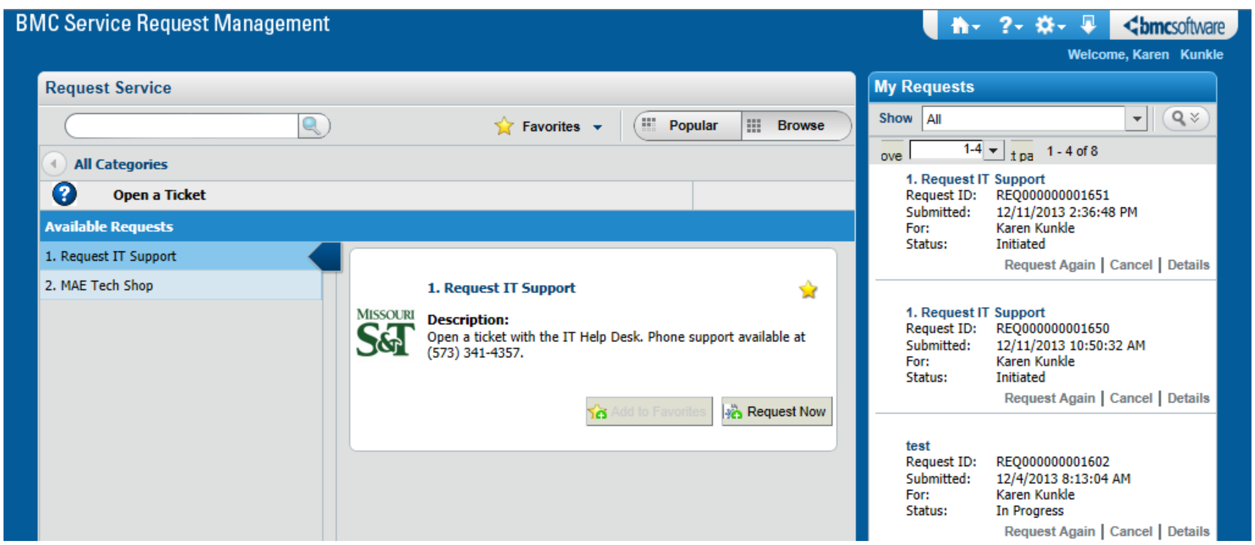
2. Select the service request you want to update. Click on it to open the "Details" option.



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

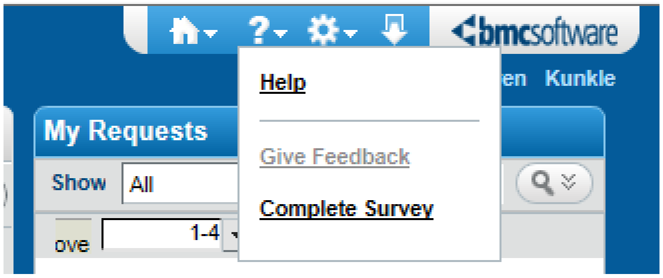


4. Click **Close**. You are returned to the main menu where you may log out.

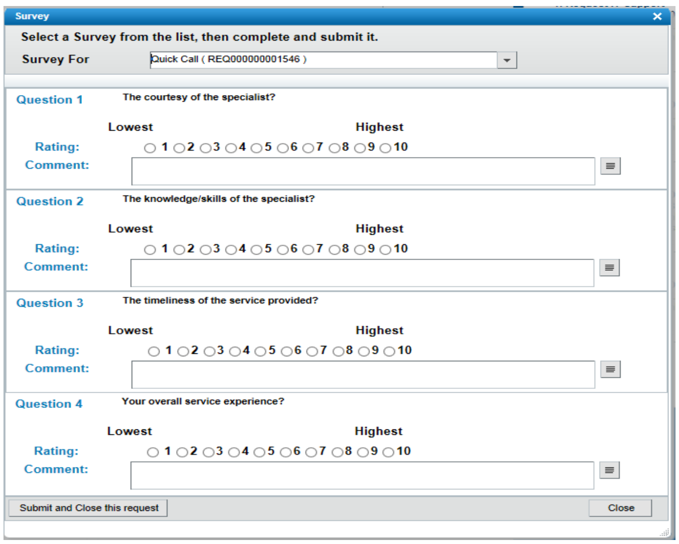


4.0 Answering Surveys

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



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



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**