Remedy ITSM
Incident Management
User Guide

For use by IT professional support staff
with Remedy ITSM at Missouri S&T

Version 1.4
December 11, 2013
## Revision History

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<thead>
<tr>
<th>Version</th>
<th>Date Modified</th>
<th>Author</th>
<th>Modification</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Melissa Deatz</td>
<td>Added S&amp;T data and updated attachment file size limitation to 60 MB</td>
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</tr>
</tbody>
</table>
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1.0 Getting Started

1.1 LOGGING INTO REMEDY

Go to https://remedy.umsystem.edu

Put in your User Name (SSO) and password

If you have trouble logging in, try putting in your domain followed by the backslash (\) then your username.

If you stayed logged into remedy overnight, logout and close your browser before logging back into remedy.

The Web Server will log you out after 1 hour of inactivity.
This will now take you to the **Overview Console**

Overview Console allows you to see important information about the Remedy environment. By default you can see all of your open incidents. This screen can be customized.

### 1.2 Customizing the Overview Console

1. Click the + sign in the upper right hand corner (this will divide the screen into four sections)

2. Click the drop down next to **Show**

3. Choose the object you want to see
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Click on the <strong>X</strong> to close a window</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Save</strong> button</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>OK</strong> button</td>
</tr>
</tbody>
</table>
2.0 Creating New Incidents

2.1 Navigating to New Incidents

1. Click on the Applications List

2. Hover over Incident Management

3. Click on New Incident

The Application list is not in alphabetical order due to us using Remedy out of the box.
### 2.2 New Incident Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>(A)</td>
<td>Generated automatically by the system. This is a unique number for each incident.</td>
</tr>
<tr>
<td>(B)</td>
<td>Campus of the customer. This can be used to narrow down the customer or will be auto generated from the customer.</td>
</tr>
<tr>
<td>(C)</td>
<td>The name of the customer. Type in the last name of the customer. As you type it in it will find possible matches. Select the correct one.</td>
</tr>
<tr>
<td>(D)</td>
<td>If the customer and the contact for the incident are different.</td>
</tr>
<tr>
<td>(E)</td>
<td>The Notes field is used for initial contact with the customer. This would include the problem, resolution steps and the location of the customer if it was needed by a technician in the field.</td>
</tr>
<tr>
<td>(F)</td>
<td>If the incident is a common occurrence then a template may have been set up. Available templates are based on which group you belong to.</td>
</tr>
<tr>
<td>(G)</td>
<td>The summary should be no longer than a sentence long and should be in the customer’s words about what the incident was.</td>
</tr>
<tr>
<td>(H)</td>
<td>Not currently be used.</td>
</tr>
<tr>
<td>(I)</td>
<td>A Configuration Item is an asset that can be tracked in Remedy. It is currently being used to track classrooms and computer labs.</td>
</tr>
<tr>
<td>(J)</td>
<td>Date the item should be completed by</td>
</tr>
</tbody>
</table>

- **Mandatory**
- **Conditional**
- **Optional**
2.0 Creating New Incidents

(K)--How widespread is the problem.

(L)--How quickly does the incident need to be resolved.

(M)--Automatically calculated from Impact and Urgency.

(N)--Is this a User or Infrastructure Incident? Is it a request for service or restoration of service?

(O)--How was the incident reported?

(P)--The support group the incident is being assigned to. Broken down by Campus, Support Organization, and then Support Group.

(Q)--The person who the incident will be assigned to.

(R)--If the incident has an outside vendor involved in the incident.

(S)--If the vendor has assigned a number to the incident in their tracking system.

(T)--The current status of the incident, by default, it is set to New. If you assign the incident to yourself, then the incident status will need to be set to In Progress, Resolved, or Closed.

(U)--If status is set to Pending, Resolved, Closed, or Canceled then this field is required.

(V)--If the status is set to resolved or closed then a resolution must be entered.
2.3 CREATING A NEW INCIDENT WITH A CUSTOMER WITH A COMMON LAST NAME

1. Next to the Customer field, click the Search icon.

2. Type in any known values and click the Search button.

3. Select the correct choice out of the bottom panel.

4. Click on the Select button.

Since the Customer field cannot be a free-form field there are generic people types. To find a generic name enter your company name in the last name field and click the Search button.
2.4 Creating a New Incident with an Uncommon Last Name

1. Click in the Customer field (C)

2. Begin to type in the last name (at least 3 letters)

3. Continue to type until you see the correct name

4. Click on the correct one

2.5 See Detail Information About the Customer

1. Click on the Customers Details button next to the Customers field (C)

2. You can review the People Information

3. Click the Close button

You cannot change this information. If contact information has changed, it should be noted in the Notes field (E).
2.6 Hover Over for Details

1. Let your mouse rest over the **Customer** field (C)

   ![Customer Field](image)

   **Customer**

   Gilzow, Joshua F

2. The details will appear after a couple of seconds

   ![Details Display](image)

   **Name**: Gilzow, Joshua F
   **Corporate ID**: 01042640
   **Login ID**: gilzowj
   **Phone**: (573) 882-7135
   **Email**: gilzowj@missouri.edu

3. If you move your mouse away, it will disappear

   ![Mouse Movement](image)

Hover over can be used on the **Customer**, **Contact**, **Assigned Group**, and **Assignee** fields.

If a **Sensitive** flag appears next to the **Customer** field, this customer has exercised his or her FERPA privacy rights. Therefore, IT is not allowed to provide any contact information to anyone for any reason and must use the data only in the context of the given incident.
2.7 Assigning an Operational Category and a Product Category

1. Click on the Categorization Tab

2. Under Operational Categorization, click the drop down triangle next to Tier 1

3. Choose the appropriate category

4. Under Product Categorization, click the drop down triangle next to Tier 1

5. Choose the appropriate category

6. Assign other Tiers as directed
7. Click the **Save** button

8. If the incident has been set to closed or cancel, then the save button will not be available. All Categories should be set before changing the status to closed or canceled.

### 2.8 Assigning an Incident to Another Group

1. Click the drop down triangle next to **Assigned Group**

2. Hover over the appropriate **Campus**

3. Hover over the appropriate **Support Organization**

4. Click on the appropriate **Support Group**

5. Click on the drop down triangle next to **Assignee**

6. Click on the person you wish to assign it to

You may also type in the first 3 letters of the group name or the assignee instead of choosing it from the list.
2.0 Creating New Incidents

2.9 Change the Status of an Incident

1. Click on the drop down triangle next to Status

2. Click on the status you want to change

3. Click on the Save button in the lower left hand corner of the screen

When you change status to Pending or Resolved then Status Reason must also be filled in.

When you change status to Resolved or Closed then Resolution must also be filled in.

2.10 Assigning an Incident to Yourself

1. On the Quick Actions pane select the top choice of Assign to Me

2. If you belong to more than one group, select it from the popup window

3. Select the OK button
If you only belong to one group you will not need to press the OK button.

2.11 **SAVE A NEW INCIDENT**

1. Click the **Save** button in the lower left hand corner of the screen.

2. If there are errors they will be reported at the top of the screen.

3. If there are no errors the incident will be saved but remain on the screen.

You may need to scroll down to see the **Save** button

You can create another new incident from **New Incident** form by clicking the green plus symbol at the top left of the screen. You may navigate to the Search form from the **New Incident** form by click on the blue search icon at the top left of the screen.

2.12 **USING TEMPLATES**

1. Choose the search button next to the **Template** field
2. Select the template that you want to use

3. Click on the Select button

You may also enter the first 3 letters of the template name and select the template that you want to use.

Double clicking on a template will bring up the template editor. You cannot save changes to the template editor unless you are a template master.
# 3.0 Searching for Incidents

## 3.1 Navigating to Search Incidents

1. Click on the **Applications** List

2. Hover over **Incident Management**

3. Click on **Search Incident**

## 3.2 Searching for an Incident Based on Incident ID

1. Click in the **Incident ID** field

2. Type in the **Incident Number** minus all the zeros at the beginning

3. Press the **Enter** key

4. At the top of the screen there will be a list of incidents that match that **Incident Number**
3.0 Searching for Incidents

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3.3 Creating a New Search from the Search Form

1. Click the New search button at the top of the screen

2. If changes have been made since the last save, you will be prompted to save the current request

3. Clicking Yes will save the changes and bring up a new search form.

3.4 Searching for an Incident with a Customer that has a Common Last Name

1. Next to the Customer field click the search icon

Using the Incident Number should only return one incident so you do not need to select it from the top to see the incident.
2. Type in any known values and click the **Search** button

![Organization Information]

**Person Information**

- First Name: bar
- Last Name: smith
- Full Name: 
- Login ID: 

![Search and Clear buttons]

3. Pick the correct choice out of the bottom panel

![Customer details]

<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harriet</td>
<td>M</td>
<td>Smith</td>
</tr>
<tr>
<td>Harry</td>
<td>Neilson</td>
<td>Gordon</td>
</tr>
</tbody>
</table>

4. Click on the **Select** button

![Select, View, Create buttons]

5. Click on the **Search** button at the top

### 3.5 Clearing Out the Customer Details from the Search

1. Click the **Clear Customer Details** button next to the Customer field
3.0 Searching for Incidents

3.6 Searching for an Incident with a Customer that Has an Uncommon Last Name

1. Click in the Customer field

2. Begin to type in the last name (at least 3 letters)

3. Continue to type until you see the correct name

4. Click on the correct one

5. Click on the Search button at the top

3.7 Loading a Recent Search

1. Click on the Searches button
2. Hover over **Load Recent**

3. Click on the search that you want to run

### 3.8 Saving a Search

1. Run a search

2. Click on **Searches**

3. Click on **Save Search…**

4. Type in a name for the search in the **Search Name** field

5. Click the **OK** button
### 3.9 Running a Saved Search

1. Click on **Searches**

2. Hover over **Run My Searches**

3. Click on the Search you want to run

### 3.10 Managing Saved Searches

1. Click on **Searches**

2. Click on **Manage My Searches...**
3. Click on a saved search you wish to disable

4. Click on the Disable button

5. Click on a search that you wish to delete

6. Click on the Delete button

7. Click on the Save button

Disabled searches will not show up under Run My Searches

3.12 FINDING AN INCIDENT BASED ON THE SERVICE REQUEST ID

1. Click on the New Search button

2. Click on the Additional Search tab

3. Click in the field next to Service Request ID

4. Type in % sign followed by the Service Request ID
3.0 Searching for Incidents

5. Click on the **Search** button

---

**Do not use the percent sign when searching in the Incident ID field**

---

### 3.13 LOOKING AT THE SERVICE REQUEST INFORMATION

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click on <strong>Functions</strong> on the left hand side of the screen</td>
</tr>
<tr>
<td>2.</td>
<td>Click on <strong>View REQxxxxxxxx</strong></td>
</tr>
<tr>
<td>3.</td>
<td>Click on the <strong>Close</strong> button</td>
</tr>
</tbody>
</table>
### 3.14 Global Search

1. Place your cursor in the **Global Search** field in the upper right hand corner of the screen

2. Type in whatever you are looking for and press **Enter** key

3. **Double click** the entry to see the record

4. If the list is too long, then click on the **Advanced Search** link at the top

5. Fill in the appropriate fields and press the **Enter** button

As other Remedy modules go live the global search will find **Incidents**, **Knowledge Based** articles, **Problem Investigations**, and most other items in remedy.
4.0 Incident Management Console

4.1 Navigating to the Incident Management Console

1. Click on the Applications List

2. Hover over Incident Management

3. Click on Incident Management Console
### 4.2 Using Show and Filter by Selections

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1.   | Click on the drop down triangle next to **Show**.  
|      | ![Show Filter](image) |
| 2.   | Click on the **Incidents** you want to see.  
|      | ![Incidents Filter](image) |
| 3.   | Note the **Counts** in the upper left hand corner.  
|      | ![Counts](image) |
| 4.   | Click on the drop down triangle next to **Filter By**.  
|      | ![Filter By](image) |
| 5.   | Hover over **Defined Searches**.  
|      | ![Defined Searches](image) |
| 6.   | Hover over the type of incident.  
|      | ![Incident Types](image) |
| 7.   | Click on the **Priority** or **Impact** to filter by that group.  
|      | ![Priority and Impact](image) |
| 8.   | **Double click** to open that incident.  
|      | ![Open Incident](image) |

If the incident list does not change after applying the filter, or if it shows 0 results, click on the refresh button on the far right hand side of the screen.
### 4.3 Adding More Filters

1. Click on the **More Filters** button

2. Click on the drop down triangle next to a criteria

3. Select a value for the criteria

4. Choose additional criteria if needed

5. Click the **Apply** button

#### More Filter Criteria

<table>
<thead>
<tr>
<th>Incident Basics and Assignment</th>
<th>Contacts</th>
<th>Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Impact</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Urgency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incident Type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vendor Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assigned Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner Group</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 4.4 Adding an Incident to the Watch List

1. Click on the **Incident** you wish to add to the Watch List in the Incident Pane

#### Incidents

<table>
<thead>
<tr>
<th>ID</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>INC0000000004981</td>
<td>testing email verbiage</td>
</tr>
<tr>
<td>INC0000000004903</td>
<td>red</td>
</tr>
</tbody>
</table>
2. Click on the **Add To Watch List** link on the right hand side of the Incidents Pane

<table>
<thead>
<tr>
<th>Add To Watch List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferences ▼</td>
</tr>
<tr>
<td>LM Status</td>
</tr>
</tbody>
</table>

### 4.5 Viewing Incidents on the Watch List

1. Click on the drop down triangle next to **Show** at the top of the screen

2. Click on **Watch List**

<table>
<thead>
<tr>
<th>Show</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned To Me</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Incidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
</tr>
<tr>
<td>Submitted By Me</td>
</tr>
<tr>
<td>Assigned To Me</td>
</tr>
<tr>
<td>Assigned To My Selected Groups</td>
</tr>
<tr>
<td>Assigned To All My Groups</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watch List</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>NC0000000049 (clear)</td>
</tr>
</tbody>
</table>
5.0 Updating Incidents

5.1 Adding Work Detail

1. Click in the Notes Field on the right hand side of the screen

2. Add text to the Notes field

3. Click on the Add button

![Add Work Info](image)

You may need to scroll down to see the Add Work Info area.

5.2 Adding an Attachment

1. Click on the Browse Attachment button next to the Attachment field in the lower right hand corner of the screen

2. Click the Browse button

3. Navigate to the file

4. Select the file

5. Click on the Open button
6. Click the OK button

The file attachment can be up to 60 mb and only files types that are allowed by the Outlook Exchange Server.

### 5.3 Multiple Attachments and Options

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click on <strong>More Details</strong> on the bottom right hand side of the screen</td>
</tr>
<tr>
<td>2.</td>
<td>Add up to two more attachments using the same steps above</td>
</tr>
<tr>
<td>3.</td>
<td>You can lock the <strong>Work Details</strong> record so that it cannot be edited or deleted. Change the radio button next to <strong>Locked</strong> to Yes</td>
</tr>
<tr>
<td>4.</td>
<td>Make the record viewable to the customer by selecting the <strong>Public</strong> radio button next to <strong>View Access</strong></td>
</tr>
</tbody>
</table>
5.0 Updating Incidents

5. Click the **Save** button

<table>
<thead>
<tr>
<th>1. Click on the <strong>View Attachment</strong> button</th>
<th>Add Work Info</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Notes:</td>
</tr>
<tr>
<td></td>
<td>Attachment:</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>![More Details]</td>
</tr>
<tr>
<td></td>
<td>Add</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Click on the <strong>Delete Attachment</strong> button</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>3. Click the <strong>Save</strong> button</th>
</tr>
</thead>
</table>

Any records marked Public can be seen by the customer in the SRM.

### 5.4 View or Delete an Attachment

1. Click on the **View Attachment** button
2. Click on the **Delete Attachment** button
3. Click the **Save** button

If the **Work Detail** is locked, then the attachment may be viewed but not deleted.

Viewing the attachment will launch the default program for that file type. If a compatible program is not installed, then the user will not be able to open the file.
## 6.0 Emails

### 6.1 Email Matrix

<table>
<thead>
<tr>
<th>Action Taken</th>
<th>Customer</th>
<th>Assignee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New Incident</td>
<td>X¹</td>
<td>X¹</td>
</tr>
<tr>
<td>Reassign Incident</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Resolve Incident</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Close Incident</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Cancel Incident</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

1. If the ticket status is set to Resolved, Closed, or Canceled on its initial save; then an email won’t go out.
7.0 Other Tasks

7.1 To View Broadcast and Create an Incident Based on the Broadcast

1. Click the New Broadcast button or link in the upper left hand corner of the screen.

2. Select the Broadcast from the left hand side of the popup

3. Select the View button in the lower left hand corner of the popup
4. To create an incident based on this broadcast click the **Create Incident** button.

5. Fill out the Incident:

   - **Subject**
   - **Broadcast Message**
   - **Broadcast Type**
   - **Broadcast Start Date**
   - **Broadcast End Date**
   - **Broadcast Originated From**
   - **Broadcast Originated From ID**

   ![Create Incident button highlighted]

6. Click the **Save** button.

   - **Save**

---

If you do not need to create an incident base on the broadcast then click on the close button twice.

---

### 7.2 REPORTING TIME

1. Click on the **Effort Time** button next to the **Assignee** field.

   - **Assignee**: Joshua F Gilzow

2. Update the value next to **Effort Time Spent in Minutes** in the popup window.

3. Click the **Close** button.

   - **Close**

---
Once the incident is saved, **Effort Time** will be added to **Total Time Spent Minutes**.

### 7.3 CREATING RELATIONSHIPS BETWEEN INCIDENTS

1. **Open an Incident then click on triangle next to Create Relationship to in the Quick Action Panel**

2. **Click** on the item you wish to create the relationship to

3. **Using Search or Advanced Search** find the item you wish to relate to

4. **Select** the correct item from the list

5. **Select the drop down arrow underneath Select a Relationship Type**

6. **Select the relationship type**

7. **Click the Relate button**
8. Click the **OK** button

<table>
<thead>
<tr>
<th>BMC Remedy User - Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>The incident INC000000000750 is related to the Incident INC000000000751 ( \text{Test master/slave - master} ). (ARNOTE 1930015)</td>
</tr>
<tr>
<td>OK</td>
</tr>
</tbody>
</table>

9. Click the **Save** button at the bottom

During Search you might need to use the wildcard character % if you don’t have the full Incident Number.

To view more details about a selected item choose the View button.

### 7.4 **LOOKING AT RELATED ITEMS**

<table>
<thead>
<tr>
<th>1. Click on the <strong>Relationships</strong> tab</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Work Detail</strong></td>
</tr>
<tr>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>0 entries returned - 0 entries matched</td>
</tr>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td><img src="image4.png" alt="Image" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Double click on the related item</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>3. To return to the related incident, double click on the related incident or click on the incident in the bread crumb trail at the top</th>
</tr>
</thead>
</table>
### 7.5 Running Canned Reports

1. On the left hand side, click on **Consoles**

2. Click on **Reports**

3. Click on the drop down triangle next to **Category**

4. Hover over **Incident**

5. Hover over the category of the report

6. Click on the report subcategory

7. Click on the report

8. Click on the **Run** button
You can export the report to Excel using the Export report button or print the report using the Print report button.

7.6 Adding a Task to an Incident

1. From the Incident Management Console, select the incident you want to add a task for. Use the Search Incident function on the side menu or the Show and Filter By fields to find the desired incident.

2. Once you have opened the selected incident, click on Links and select Tasks from the side menu.
3. Under the **Request Type** field, select **Ad hoc** from the list.

4. Click on **Relate**.

5. Enter the name of the task in the **Name** field.

6. Enter a description of the task in the **Summary** field.

7. Enter additional information about the task in the **Notes** field.

8. Select the **Priority** from the list (Critical, High, Medium, or Low)
9. Click the **Assignment/Dates** tab.

10. Select the **Assignee Company**, **Organization**, and **Group**, and **Assignee** from the drop-down lists.

11. Select **Yes** in the **Notify Assignee** field to generate an email to the assignee. Otherwise, select **No** or leave the field blank if you do not want to send an email to the task assignee.

---

The status of the Incident cannot be New or Assigned to generate the email to the task assignee. You will need to move the status to In Progress for the email to generate.
### 7.0 Other Tasks

#### 12. Select the scheduled start and end dates.

<table>
<thead>
<tr>
<th>Dates/Time</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Start Date</td>
<td></td>
</tr>
<tr>
<td>Scheduled End Date</td>
<td></td>
</tr>
<tr>
<td>Actual Start Date</td>
<td></td>
</tr>
<tr>
<td>Actual End Date</td>
<td></td>
</tr>
</tbody>
</table>

#### 13. Click on **Save**.

The new task is displayed under **Details and Tasks** when the incident in question is highlighted on the Incident Management Console.