

# BMC Remedy Service Desk: Incident Management User Guide



Supporting

Version 7.6.04 of BMC Remedy Incident Management

January 2011

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- order or download product documentation
- download products and maintenance
- report a problem or ask a question
- subscribe to receive proactive e-mail alerts
- find worldwide BMC support center locations and contact information, including e-mail addresses, fax numbers, and telephone numbers

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Have the following information available so that Customer Support can begin working on your issue immediately:

- product information
  - product name
  - product version (release number)
  - license number and password (trial or permanent)
- operating system and environment information
  - machine type
  - operating system type, version, and service pack or other maintenance level such as PUT or PTF
  - system hardware configuration
  - serial numbers
  - related software (database, application, and communication) including type, version, and service pack or maintenance level
- sequence of events leading to the problem
- commands and options that you used
- messages received (and the time and date that you received them)
  - product error messages
  - messages from the operating system, such as file system full
  - messages from related software



## License key and password information

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- Send an e-mail message to [customer\\_support@bmc.com](mailto:customer_support@bmc.com). (In the Subject line, enter **SupID:yourSupportContractID** , such as SupID:12345.)
- In the United States and Canada, call 1 800 537 1813. Outside the United States and Canada, contact your local support center for assistance.
- Submit a new issue at [http://www.bmc.com/support\\_home](http://www.bmc.com/support_home).

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## About this Book

The BMC Remedy Service Desk: Incident Management User Guide describes how to use the BMC Remedy Incident Management application of the BMC Remedy IT Service Management Suite.

The BMC Remedy IT Service Management Suite includes:

- The BMC Remedy Service Desk solution, which includes the BMC Remedy Incident Management application and the BMC Remedy Problem Management application
- The BMC Remedy Asset Management application
- The BMC Remedy Change Management application, which also includes the BMC Remedy Release Management module

The applications run with the BMC Remedy Action Request System (BMC Remedy AR System) environment and share a common database. All these applications receive data from the BMC Atrium Configuration Management Database (BMC Atrium CMDB).

## Audience

This guide is intended for the following IT professionals:

- IT support staff
- IT managers

The Requester console, which is also described in this guide, is intended for any IT requester" (that is, anyone requesting support from IT).

# BMC Remedy IT Service Management Suite documents

The following table lists the documentation available for BMC Remedy Service Desk: Incident Management. It also lists relevant documents for related solutions and products.

Unless otherwise noted, online documentation is available with the product and on the Customer Support website at <http://www.bmc.com/support>.

Title	Document provides	Audience
<b>BMC Remedy Service Desk: Incident Management</b>		
<i>BMC Remedy IT Service Management Release Notes</i>	Information about known issues in each release of BMC Remedy IT Service Management. Also provides a list of new features included with the applications.	Everyone
<i>BMC Remedy Service Desk: Incident Management User Guide</i>	Procedures for using the BMC Remedy Incident Management application; includes new features and overview.	Everyone
<i>BMC Remedy IT Service Management Administration Guide</i>	Procedures for administrating and configuring the BMC Remedy IT Service Management applications.	Administrators
<i>BMC Remedy IT Service Management Concepts Guide</i>	Conceptual overview information about the applications that make up the BMC Remedy ITSM suite of applications.	Everyone
Help	Help for using and configuring BMC Remedy Incident Management , available by clicking Help in the product interface. Available from Help links after Help is installed.	Everyone
<b>Other BMC Remedy IT Service Management products</b>		
<i>BMC Remedy Service Desk: Problem Management User Guide</i>	Procedures for using the BMC Remedy Service Desk: Problem Management application; includes new features and overview.	Everyone
<i>BMC Remedy Asset Management User Guide</i>	Procedures for using the BMC Remedy Asset Management application; includes new features and overview.	Everyone
<i>BMC Remedy Change Management User Guide</i>	Procedures for using the BMC Remedy Change Management application; includes new features and overview.	Everyone
<i>BMC Service Management Process Model, BMC Best Practice Flows</i>	A white paper describing the best practice work flow for the BMC Remedy IT Service Management processes that are covered by the BMC Service Management Process Model.	Everyone
<b>Solutions</b>		

Title	Document provides	Audience
<i>BMC Service Impact Manager: Integration for BMC Remedy Service Desk User Guide</i>	Detailed information about the Integration for the BMC Remedy Service Desk (IBRSD) component. This guide is intended for system administrators and users with an understanding of the BMC Impact Manager and BMC Remedy Service Desk environments.	Administrators and BMC Impact Manager users
<i>Service Management Solutions Release Notes</i>	Information about new features, open issues, and resolved issues.	Everyone
<b>BMC Atrium CMDB</b>		
<i>BMC Atrium Core Release Notes</i>	Information about new features, open issues, and resolved issues.	Everyone
<i>BMC Atrium CMDB User Guide</i>	Information about using BMC Atrium CMDB, including searching for and comparing CIs and relationships, relating CIs, viewing history, running impact simulations, and viewing federated data.	Users
<i>BMC Atrium Core Troubleshooting Guide</i>	Information about resolving issues with BMC Atrium Core components, including API, filter and console error messages and their solutions.	Administrators, programmers, and BMC Support personnel
<b>BMC Remedy Action Request System</b>		
<i>BMC Remedy Approval Server Guide</i>	Information about installation and configuration of the BMC Remedy Approval Server, how to use the BMC Remedy Approval Server, and understanding the approval workflow.	Everyone
<b>BMC Service Level Management</b>		
<i>BMC Service Level Management Release Notes</i>	Information about known issues in each release of BMC Service Level Management. Also provides a list of new features included with the application.	Everyone
<i>BMC Service Level Management User Guide</i>	Procedures for using the BMC Service Level Management application; includes new features and overview.	Everyone
<b>BMC Service Request Management</b>		
<i>BMC Service Request Management Release Notes</i>	Information about new features and known issues.	Everyone
<i>BMC Service Request Management User Guide for Administrators and Users</i>	Procedures for using the BMC Service Request Management application.	Everyone
<b>BMC Remedy Knowledge Management</b>		
<i>BMC Remedy Knowledge Management User Guide</i>	Procedures for using the BMC Remedy Knowledge Management application; includes new features and overview.	Everyone

Title	Document provides	Audience
<b>BMC Service Management Process Model</b>		
<i>BMC Service Management Process Model Role Mapping to BMC Remedy ITSM Suite</i>	List and description of BMC Service Management Process Model roles.	Everyone

## Conventions

This document uses the following special conventions:

- All syntax, operating system terms, and literal examples are presented in this typeface.
- Variable text in path names, system messages, or syntax is displayed in italic text:  
*testsys/instance/fileName*
- This document uses a symbol to show menu sequences. For example, **Actions => Create Test** instructs you to choose the **Create Test** command from the **Actions** menu.

## Syntax statements

This topic explains conventions for showing syntax statements.

A sample statement follows:

```
COMMAND KEYWORD1 [KEYWORD2 | KEYWORD3] KEYWORD4={YES | NO} fileName...
```

Convention	Example
Items in italic type represent variables that you must replace with a name or value. If a variable is represented by two or more words, initial capitals distinguish the second and subsequent words.	<i>alias</i> <i>databaseDirectory</i> <i>serverHostName</i>
Brackets indicate a group of optional items. Do not type the brackets when you enter the option. A comma means that you can choose one or more of the listed options. You must use a comma to separate the options if you choose more than one option.	[ <i>tableName, columnName, field</i> ] [-full, -incremental, -level] (UNIX)

Convention	Example
Braces indicate that at least one of the enclosed items is required. Do not type the braces when you enter the item.	<pre>{DBDName   tableName} UNLOAD device={disk   tape, fileName   deviceName} {-a   -c} (UNIX)</pre>
A vertical bar means that you can choose only one of the listed items. In the example, you would choose either <code>commit</code> or <code>cancel</code> .	<pre>{commit   cancel} {-commit   -cancel} (UNIX)</pre>
An ellipsis indicates that you can repeat the previous item or items as many times as necessary.	<pre>columnName...</pre>





# Introducing BMC Remedy Incident Management

According to IT Infrastructure Library (ITIL) standards, the primary goal of the incident management process is to restore normal service operation as quickly as possible with minimum disruption to the business, thus ensuring that the best achievable levels of availability and service are maintained.

The BMC Remedy Incident Management application helps you to restore normal service operation quickly by managing all aspects of an incident, from creation to their resolution and closure.

The processes described in this guide are developed from the BMC Service Management Process Model (SMPM), which is a companion product to BMC Remedy Incident Management. The SMPM describes a set of predefined processes for the delivery and support of information technology (IT) services. The processes described by the SMPM are aligned with ITIL good practices.

## BMC Remedy ITSM usability enhancements

The BMC Remedy ITSM 7.6.04 release contains the following usability enhancements. These enhancements are available only when the applications are accessed through a web browser.

**Table 1: BMC Remedy ITSM usability enhancements**

Description	Affected applications and modules
<p>To help you retrieve information faster, the type-ahead search functionality is available on more fields. When you start to type a query into a field that has the type-ahead search functionality, one or more possible matches are immediately presented for selection in a drop-down list. As you type more characters, the list changes to match what you type.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Change Management</li> <li>■ Release Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Remedy Knowledge Management</li> <li>■ BMC Service Request Management</li> </ul>
<p>To improve application usability when using the Best Practice and Classic view, a system-generated record ID is assigned to all new record types immediately when the application displays the form in New mode.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Change Management</li> <li>■ Release Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Problem Management</li> <li>■ BMC Service Request Management (work order)</li> </ul>
<p>To improve application performance, system administrators can configure system messages from filters and servers to appear in a message bar instead of in pop-up windows. For information about this configuration, see the <i>BMC Remedy Action Request System 7.6.04 Configuration Guide</i>.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Asset Management</li> <li>■ BMC Remedy Change Management</li> <li>■ Release Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Remedy Knowledge Management</li> <li>■ BMC Service Request Management</li> <li>■ BMC Service Level Management</li> </ul>

Description	Affected applications and modules
<p>Using the Application Preferences settings, you can configure the system to display a confirmation message when you submit a new record. For information about these settings, see your application's user guide.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Change Management</li> <li>■ Release Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Service Request Management (work order)</li> </ul>
<p>To provide easier access to the BMC Service Management Process Model (SMPM) from the applications, the Process Overview link is available from the Quick Actions navigation area of the main forms. The Process Overview link is also available above the main tables on the consoles.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Asset Management</li> <li>■ BMC Remedy Change Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> </ul>
<p>To improve overall system performance, most consoles and forms now open inside a single view area, instead of in individual windows.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Asset Management</li> <li>■ BMC Remedy Change Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Service Request Management (work order)</li> <li>■ BMC Remedy Knowledge Management</li> </ul>
<p>To make navigation through the BMC Remedy ITSM suite of applications easier, a more consistent navigation model is used on the IT Home Page, consoles, and forms. For example, the application menu that appeared on the IT Home page in earlier releases of the BMC Remedy ITSM suite of applications is now used on all of the application consoles and main forms.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Asset Management</li> <li>■ BMC Remedy Change Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Service Request Management (work order)</li> <li>■ BMC Remedy Knowledge Management</li> </ul>

Description	Affected applications and modules
<p>To make required fields more obvious, when you save a record, a red box outlines required fields that do not contain valid information.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Asset Management</li> <li>■ BMC Remedy Change Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Service Request Management</li> </ul>
<p>To improve usability, the number of steps needed to create a work info entry has been reduced. See the applicable application user guide for information about how to create work info entries.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Change Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Service Request Management</li> </ul>
<p>To make searching for information across applications easier and more intuitive, a global search option is available. The search scans and retrieves information from the installed BMC Remedy ITSM applications and presents it in a readable, consumable format. See the applicable application user guide for information about how the global search function works.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Asset Management</li> <li>■ BMC Remedy Change Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Service Request Management(work order)</li> </ul>
<p>To make creating Relationships easier, a new link called <b>Create Relationship to</b> is available. See the applicable application user guide for information about how the link works.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Change Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> </ul>

Description	Affected applications and modules
<p>To help you find field-level details more easily, you can use the new Detail icon to display detailed information about the field's content. For example, if you click the Detail icon associated with the Customer field, the People form appears with information about the customer whose name appears in the field. This new feature replaces the hyperlinked field labels in earlier versions of the applications.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Change Management</li> <li>■ Release Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ BMC Service Request Management (work order)</li> </ul>
<p>To quickly access BMC Atrium Explorer from the Service and CI fields, you can click the new Explore CI icon.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Asset Management</li> <li>■ BMC Remedy Change Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> </ul>
<p>To improve search capabilities, a new search icon is added to the fields that open a search dialog box or form.</p>	<ul style="list-style-type: none"> <li>■ BMC Remedy Change Management</li> <li>■ Release Management</li> <li>■ BMC Remedy Incident Management</li> <li>■ BMC Remedy Problem Management</li> <li>■ Task Management</li> <li>■ BMC Service Request Management (work order)</li> </ul>

## Where to find features and fields that have moved

This section lists features and fields that have moved from their previous locations on the user interface and provides you with their new location.

### On the console

The following console features and links have moved.

- **KPIs** – You now access the KPIs by clicking the **KPIs** link in the **Functions** menu on the navigation pane.

- **Defined Searches**— You now access Defined Searches from the **Filter By** drop down menu at the top of the console.
- **Manage My Searches**— You now access Manage My Searches by clicking the magnifying glass icon beside the Filter By field.
- **Process Overview**— You now access Process Overview from a link above the console table.
- **Consoles**— You now access other consoles from the Application menu.

## On the form

The following application form features, fields, and links have moved.

- You now access these fields from the main body of the form:
  - **Assigned Group**
  - **Assignee**
  - **Vendor Group**
  - **Vendor Ticket Number**
  - **Status**
  - **Status Reason**
  - **Resolution**
- You now access the following links from the **Quick Action** section of the Navigation pane.
  - **Create Relationship to**— for creating relationships between the current record and other record types.
  - **Create Related Request**— for creating other record types.
  - **Process Overview**— for opening a process flow diagram.
  - **Work information**— Changes have been made to the way that you create work information entries in Best Practice view. For information about creating work information entries in this view, see [“Adding work information entries to an open incident request record”](#) on page 107.
  - **Relationships**— Changes have been made to the way you create relationships in the Best Practice view. For information about how to create relationships in this view, see [“Defining relationships”](#) on page 165

- Tool bar – The Incident form tool bar is removed. The following tool bar functions have been retained and are available from other locations on the interface:
  - **Return to Home Page** – To close the application and return to the Home page, click the Home icon on the breadcrumb bar. This function replaces the Close button, which has been removed from the interface.
  - **New mode** – To invoke new mode, open the Application menu, Select Incident Management, and click New Incident.
  - **Modify mode** – If your installation is configured to open a new incident request form after you click save when creating a new incident request record, then to invoke Modify mode you must open the incident request record that you want to modify from the console.
  - **Search mode** – From the breadcrumb bar, return to the Incident console and use Search Incident in the Navigation pane.
- You now access other consoles from the Application menu.

## What's new in BMC Remedy Incident Management

This section describes the new features in this release that are specific to BMC Remedy Incident Management.

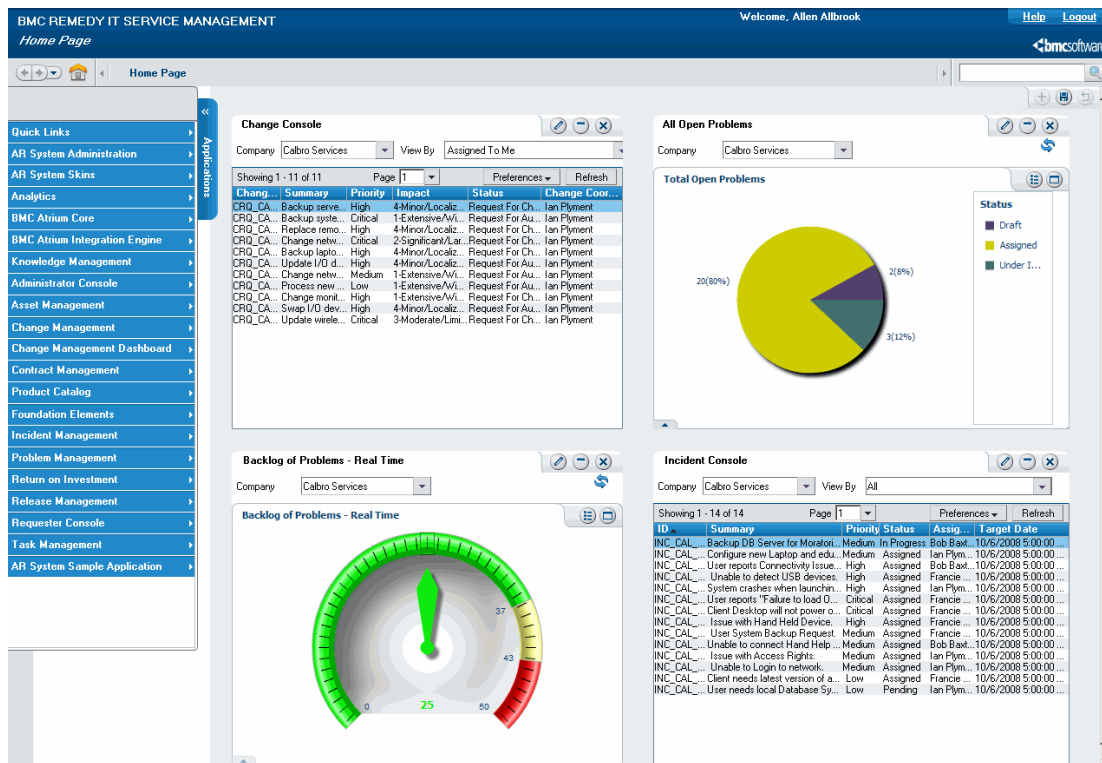
Under some circumstances, you can now quickly close the incident request, without first passing it through the Resolved status. For information about how to do this, see [Quickly closing an incident request on page 114](#)

## About the IT Home Page

When you start the BMC Remedy IT Service Management Suite, the IT Home Page displays the Overview console by default. However, you can set up what you want to see on the IT Home Page. If you are a system administrator, you can configure the page for all users. Otherwise, you can configure your own user ID to see your views.

The following figure illustrates the functional areas of the IT Home Page.

**Figure 1: IT Home Page and its functional areas**



The following table describes each of the functional areas of the IT Home Page.

Functional area	Purpose
Home Page header	
Logout	Click <b>Logout</b> to exit the application.
Breadcrumb bar	The breadcrumb bar helps you keep track of the records you are viewing and helps with navigation. For more information about breadcrumbs, refer to “Navigating consoles, forms, and modules ” on page 29.
Global search	Type in a word or a phrase in the search area, and the application will search across multiple forms for records that match your input. For more information about global search, refer to “Using Global search” on page 160.
Navigation pane	



Functional area	Purpose
<b>Applications</b>	<p>Depending on your permissions and other installed applications, the following links are displayed. Use them to open applications.</p> <ul style="list-style-type: none"> <li>■ <b>Quick Links</b></li> <li>■ <b>AR System Administration</b></li> <li>■ <b>Analytics</b></li> <li>■ <b>BMC Atrium Core</b></li> <li>■ <b>BMC Atrium Integration Engine</b></li> <li>■ <b>Administrator Console</b></li> <li>■ <b>Asset Management</b></li> <li>■ <b>Change Management</b></li> <li>■ <b>Change Management Dashboard</b></li> <li>■ <b>Contract Management</b></li> <li>■ <b>Product Catalog</b></li> <li>■ <b>Foundation Elements</b></li> <li>■ <b>Incident Management</b></li> <li>■ <b>Problem Management</b></li> <li>■ <b>Return On Investment</b></li> <li>■ <b>Release Management</b></li> <li>■ <b>Requestor Console</b></li> <li>■ <b>Task Management</b></li> </ul> <p><b>Note:</b> When you run your mouse over the applications, you see a second menu. You can select one of those options to go directly to a form. For example, roll over <b>Change Management</b> and select <b>Change/Release Calendar</b>. The Calendar screen appears.</p>
<b>Configuration Buttons</b>	Use these buttons to configure your panel display.
<b>Overview console</b>	

Functional area	Purpose
<b>Company and View By</b>	These fields combine to provide a way to indicate the company name and the assigned-to categories filtering the records in the Console List table.
<b>Refresh</b>	This button refreshes the data in the table.
<b>Preferences</b>	This button allows you to set preferences for the console list table. You can remove columns, set refresh intervals, reset and save your preferences.
<b>Console List table</b>	This table lists the different types of requests.

## Configuring the IT Home Page

You can configure the IT Home Page to display information of your choice. For example, Bob Baxter is the Manager for payroll at Calbro Services. He likes to keep track of all potential problems, changes, and incidents pertaining to his department. He also tracks software license contracts so that he knows which ones are about to expire. Bob configures his panels to display all the information he is looking for, as follows:

- **Asset Management => Contracts About to Expire in 90 Days**
- **Change Management => All Open Changes with Extensive Impact**
- **Incident Management => All Open Incidents with Extensive Impact**
- **Problem Management => All Open Problems by Status and Priority**

### To add or delete panels

You can specify how many panels to display on your IT Home Page up to a maximum of four panels.

- 1 In the IT Home Page, click the **Add panels to layout**  button.

Four panels appear.

- 2 To delete a panel, click the **Close**  button on the panel.

### To configure panels

You can select what to display on your IT Home Page.

---

#### *Note*

You can configure your panels only with options for which you have permissions.

---

- 1 In the panel, click the **Show** list and run your cursor over the list of options.
- 2 From the list of work areas for each option, select the one to display (for example, **Asset Management => Software Certificates**).

The panel displays your selection.

- 3 Repeat **Step 1** to for your other panels.

To change display on a panel, click the **Edit**  button to display the **Show** list, and make another selection.

- 4 Click the **Save Current Layout**  button to save your IT Home Page.

A dialog box confirms that your customized layout has been saved.


- 5 Click **OK**.

When you next log in, you will see your saved IT Home Page.

### To expand and collapse panels

- 1 In the panel, click the **Collapse**  button. The panel will collapse. In the panel click the **Expand**  button. The panel will expand to its original size.

### To restore a default IT Home Page view

- 1 In the IT Home Page, click the **Restore Default Layout**  button. A dialog box informs you that the default layout for this page will be brought back. Click **OK** to proceed or **Cancel** to retain your current layout. If you click **OK**, the panels on the IT Home Page disappear and the Overview Console is displayed.

### To hide or show the navigation pane

- 1 In the IT Home Page, click the **Applications** button to hide or show the navigation pane.

## Consoles overview

The following consoles provide access to all or a part of BMC Remedy Incident Management:

- Requester console

- Overview console
- Incident Management console

**Note**

Figure 2 on page 28 shows how these consoles integrate with BMC Remedy Incident Management and other BMC Remedy ITSM applications.

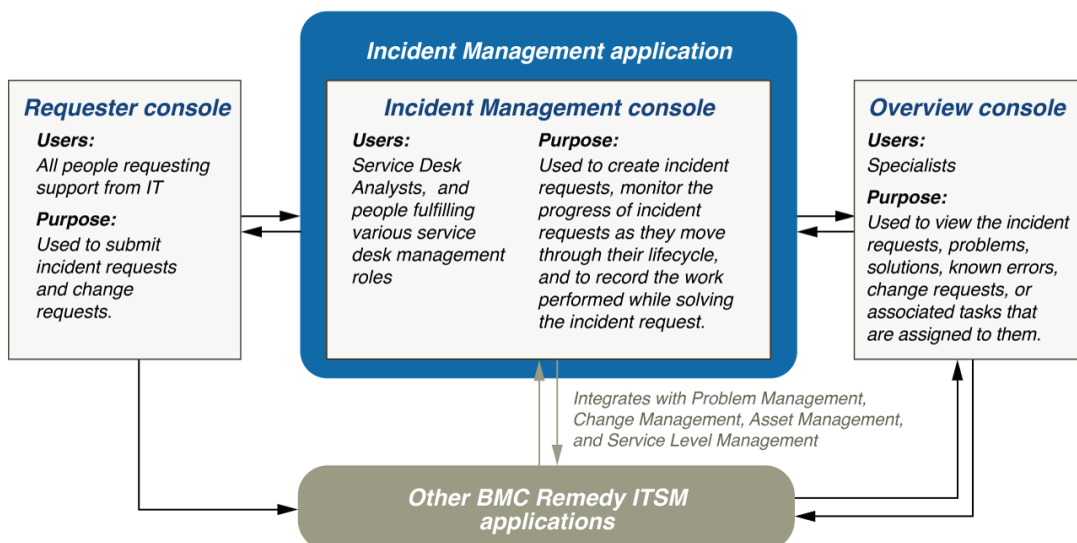
From the Requester console, IT users can submit incident requests directly to BMC Remedy Incident Management.

Using the Overview console, service desk workers who fulfill many different roles can view incident requests that are assigned to them through BMC Remedy Incident Management, and additional work assignments that come to them through other BMC Remedy ITSM applications with which BMC Remedy Incident Management integrates:

- BMC Remedy Problem Management
- BMC Remedy Asset Management
- BMC Remedy Change Management

The Incident Management console is the main console for the application. It provides service desk workers with a single point from which they can generate incident requests, monitor the progress of incident requests as they move through their lifecycle, and record work that was performed while solving the incident request.

**Figure 2: Consoles used to access BMC Remedy Incident Management**



# Navigating consoles, forms, and modules

This section describes how to navigate around BMC Remedy ITSM consoles, forms, and modules.

In most cases, when you open consoles, forms, and modules from the IT Home page, they open inside the IT Home page view. Similarly, if you open a form from a console, the form replaces the console in the view.

If you open a related record from a form, the related record opens in the view that was occupied by the form. For example, if you are working with a problem investigation (the "parent" record) and from the parent record you open a related incident request, the incident request replaces the parent record in the view. If you then open a change request from the incident request, the change request replaces the incident request in the view, and so on. To help you keep track of the records you are viewing and to help with navigation, there is a breadcrumb bar across the top of the view field.

---

## *Note*

Not all of the consoles, forms, and modules open in the view area. For example, CI records open in a new window. When a console, module, or form opens in a window, it is not added to the breadcrumb bar.

---

The breadcrumb bar contains links to the records that you opened from the parent record. When you open a record, the breadcrumb trail expands along the breadcrumb bar to the right, with the new link. If there are more than six links in the breadcrumb trail, arrows appear at one or both ends of the bar that let you scroll back and forward on the bar to see links not currently in the view.

The first link in the breadcrumb trail indicates the place from which you started. It can be a console or a form. For example, if you open a change request record directly from the IT Home page, the first link in the breadcrumb trail takes you to the change request.

The last link corresponds to the record currently in the view. If you open a link to the left of the record currently in view, the system truncates the breadcrumb trail to that link. The history is retained, however, so you can use the back and forward arrows in the navigation controls to move through the bar one record at a time. There is also a history of your most recently viewed records, which you can use to move directly to a record. Click the down arrow to open the history list.

**Note**

The Forward button is only visible after you move back down the breadcrumb bar by opening a link to a record that you previously viewed.

**Figure 3: The breadcrumb navigation buttons and bar**



If you are viewing a record from the middle of the breadcrumb trail and then branch off to another parent-type record, the system removes the forward breadcrumb trail from the point where you branched off and starts a new history from there, using the new parent-type record as the starting point. For example: You open a problem investigation, then open a related incident request, and from the incident request you open a related change request. If you go back to the incident request record and then open a second problem investigation, the breadcrumb bar no longer contains a link to the change request. The breadcrumb trail now shows the original problem investigation, the incident request, and the second problem investigation. It then shows any related records that you subsequently open from the second problem investigation.

When you close the parent record, the system removes the breadcrumb history.

## What happens to data as I move back and forth on the breadcrumb trail?

If you are entering information into a record and open another record from the breadcrumb trail, the system prompts you to save the work, if you have not done so. If you do not save the information, the system does not preserve it on the record and you must re-enter it later.

If someone updates a record on your breadcrumb trail that is not currently in the view, those changes are visible to you when you open the record again.

## How does the breadcrumb trail behave with forms in Search mode?

If you run a search from a form that is in Search mode, the last entry in the breadcrumb trail is the name of the form.

When you open a record from the search results table, that record does not appear in the breadcrumb trail. However, if you drill down through that record to open other related records, those related records *will* appear in the breadcrumb trail.

To return to the originating record, use the history list.

---

**Note**

All of the records that you open from a form in Search mode are added to the history list.

---

To return to the results table, click the name of the form in the breadcrumb trail.

## Can I force a second window to open?

If you press the Shift key and then click a record entry in a console or in any search results table, the record opens in a second window. Also, if you hold the Shift key and click a link, button, and so on, the form or dialog box associated with the link or button opens in another window.

---

**Note**

If there is a record in the history list that you want to open in a second window, press the Shift key and then *double-click* the entry.

---

## Which consoles, forms, and modules open in a new window?

Not all of the consoles, forms, and modules open in the IT Home page's view. The consoles, forms, and modules in the following list open in a new window. If you open one of these from the IT Home page, any unsaved changes to the IT Home page are lost.

---

**Tip**

Before you open any of these consoles, forms, or modules, save the changes to the IT Home page that you want to keep.

---

- BMC Remedy Asset Management, *except* for the Asset Management console.
- BMC Action Request System Administrator
- All BMC Atrium applications
- Application Administration
- BMC Service Level Management
- All Service Request Management entry points, *except* for Work Order
- Analytics
- Service Management Process Model

# Incident Request form views

BMC Remedy Incident Management release provides different ways to view the Incident Request form:

- Best Practice view (the default view)
- Classic view

Your view is configured for you by your system administrator. For information about configuring views, see the *BMC Remedy IT Service Management Administration Guide* for information about configuring views.

---

## Note

If a procedure differs depending on the view, both methods are described. Instructions for the Best Practice view are provided first.

---

## Best Practice view

In this view, the fields most commonly used for creating, resolving, and updating incident requests are immediately visible. You can access additional, less frequently used functionality from the tabbed sections of the form or from the links in the Navigation pane.

The order in which the fields appear on the form reflect the order in which you gather the information when you create the incident request record. This reduces the amount of time needed to create the record and improves the overall efficiency of the operation.

Also, by making the Work Detail tab visible beside the customer information when you open the record, the most important information is immediately visible when you require a quick but comprehensive overview of an existing incident request.

The following list outlines the Best Practice view features:

- Customer field – The Customer field is where you record the name of the customer for whom you will be performing the work related to the incident request. For more information about using the Customer field, see [Using the Customer and Contact fields in Best Practice view on page 35](#).
- Contact field – The Contact field is where you record the name of someone who you can contact about the incident request, if the person named in the Customer field is unavailable. For example, if the person named in the Customer field has an administrative assistant, you would enter this person's name in the Contact field.

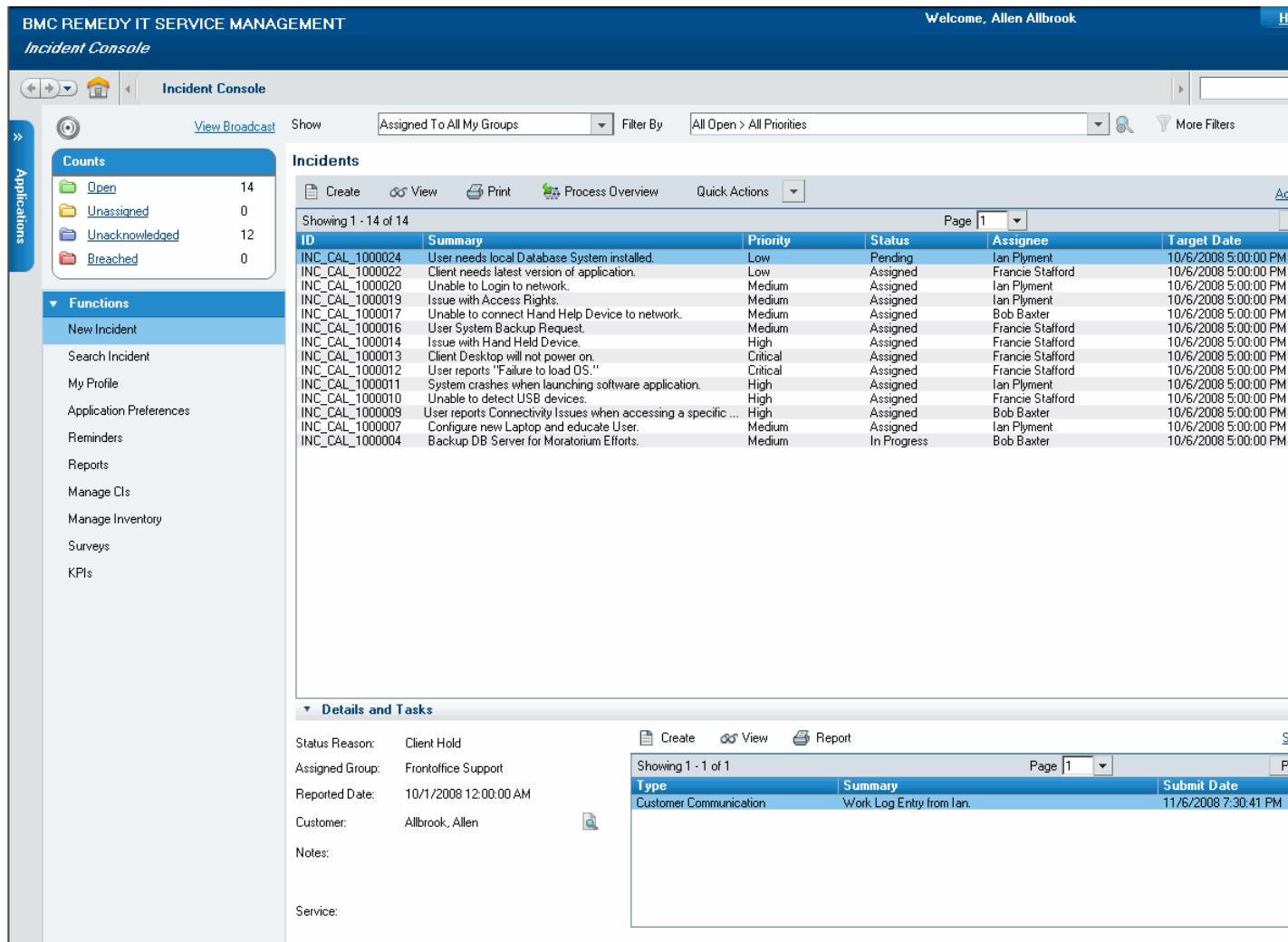


For more information about using the Contact field, see [Using the Customer and Contact fields in Best Practice view on page 35](#).

- **Template field** – The Template field encourages the use of templates. For information about the benefits of using templates and how to create an incident request using templates, see [Creating an Incident request record using a template on page 76](#).
- **Service field** – The Service field relates business service configuration items (CIs) to the incident request at the time it is created. Service entitlement for business service CIs are related either to the customer directly or to the customer's company, organization, or department. Only the CIs that you are entitled to see appear in the selection list for this field.
- **CI field** – The CI field provides a place for you to indicate to which piece of infrastructure the incident request pertains. This field is a *required* field when you resolve the incident, however, you can indicate the CI at any time in the incident request lifecycle.
- **Product categorization** – The product categorization fields are automatically filled based on the business service CI that you select in the Service field. This automation reduces registration time and makes sure that the correct information is used to determine the assignment of the incident request. You can also quickly select or change operational and product categorizations from the Quick Actions area of the Navigation pane by using the Select Operational and Select Product links.

The Best Practice view is recommended for all BMC Remedy Incident Management users, regardless of their role. For information about BMC Remedy Incident Management roles, see [User roles on page 37](#).


**Figure 4: Incident console - Best Practice view**






## Icons used in the interface

This table describes the icons used on the consoles and in the Best Practice view of the application interface.

**Table 2: Icon descriptions**

Icon	Description
	<b>Detail</b> – Displays detailed information about the field's content. For example, if you click the Detail icon associated with the Customer field, the People form appears with information about the customer whose name appears in the field.

Icon	Description
	<b>Search</b> – Searches for field contents. This icon is associated with fields that have the ability to open a search dialog box or form.
	<b>Explore CI</b> – Opens the BMC Atrium Explorer for the CIs selected in the <b>Service</b> and <b>CI</b> fields.
	<b>Clear field contents</b> – Clears the contents of the field and allows you to make another selection. It does not delete the record.

## Using the Customer and Contact fields in Best Practice view

Depending on how the Customer and Contact fields are configured, you can search for a customer based on Corporate ID, First Name, Last Name, Internet Email, or Phone Number.

If the customer record uses the VIP or the Sensitive flag, this information appears in red after the Customer field label.

Clicking the magnifying glass icon to the right of the Customer and the Contact fields opens the People form. From there, you can create a customer profile record if one does not exist. For more information about creating a customer profile, see [Adding or modifying a customer profile on page 82](#).

The eraser icon to the right of the Customer and the Contact fields only clears the field's contents. It does not delete the customer profile.

For more information about creating and modifying People records from the Incident Request form, see [Adding or modifying a customer profile on page 82](#).

## Classic view

The Classic view is the Incident Request form as it appeared in previous releases of BMC Remedy Incident Management. This view is provided for customers who are upgrading from earlier versions of BMC Remedy Incident Management and who are not yet ready to adopt the Best Practice view. The following fields have been added to the Classification tab:

- **Service field** – The Service field relates business service configuration items (CIs) to the incident request at the time it is created. Service entitlement for business service CIs are related either to the customer directly or to the customer's company, organization, or department. Only the CIs that you are entitled to see appear in the selection list for this field.

- CI field – The CI field provides a place for you to indicate to which piece of infrastructure the incident request pertains. This field is a *required* field when you resolve the incident, however, you can indicate the CI at any time in the incident request lifecycle.

## User interface standards for field labels

On BMC Remedy ITSM forms, field labels provide data entry hints.

Table 3 on page 36 lists the significance of field-label formats and special characters.

**Table 3: Significance of field labels for data entry**

Field-label format or special characters	Significance for data entry
Bold label followed by an asterisk (*)	Field is required to submit and update the form. <b>Note:</b> If you leave the field blank when you attempt to submit the form, the field is highlighted with a red border.
Field label not bolded	Field is optional.
Italicized label	System-generated value for this field. Typically this field is read-only for the user.
Label followed by a plus sign (+)	Additional functionality is associated with this field. Typically, you access this functionality by pressing <b>Enter</b> . For example, you might press <b>Enter</b> in a field to access a search dialog box or to perform a search based on the value typed into the field.  If a field label followed by a plus sign is also bolded, the field is required. Otherwise, the field is optional.

## Calbro Services

In the BMC Remedy ITSM documentation set, a fictional company named Calbro Services helps explain how BMC Remedy ITSM principles and procedures are used in practice.

Although Calbro Services is a fictional company, it is based on research of actual BMC Software customers. Learning how Calbro Services manages common IT Service Management scenarios should prove useful as you use the BMC Remedy ITSM applications in your own environment.

Calbro Services, a large, global company, is headquartered in New York City and publicly traded on the New York Stock Exchange. The company has 27,000

employees in 240 offices located in 20 countries. [Table 4 on page 37](#) describes key business services in Calbro Services.

**Table 4: Key business services**

Service	Description
Online banking	500 ATMs in major cities
WWW presence	Corporate site and online brokerage services
Discount equity brokerage	Online and storefront services
Sales force automation	Automated sales activities such as leads, orders, reports, and so on
Customer support	Support centers in the United States, Europe, and Asia
Mass marketing	World-wide marketing campaigns aimed at making Calbro Services a household name

## User roles

BMC Remedy Incident Management provides functionality both to people requesting support from IT and to IT people providing support to others. How each person uses BMC Remedy Incident Management defines their role. BMC Remedy Incident Management roles are divided into the following categories:

- **support staff**, for a description of these roles, see [Support staff roles on page 38](#).
- **managers**, for a description of these roles, see [Manager roles on page 38](#).
- **users**, for a description of this role, see [User role on page 39](#).

### Note

The permissions model in BMC Remedy Incident Management has had several updates since version 6.0. To define permissions and functional roles, review the permissions and functional roles section in the *BMC Remedy IT Service Management Administration Guide*.

The following figure illustrates the different BMC Remedy Incident Management support staff and management roles. It also shows where each role fits into the lifecycle of an incident request. For general information about the incident request lifecycle, see [Process flow and the lifecycle of an incident request on page 41](#).

The relationship between specific BMC Remedy Incident Management roles and the individual stages in the lifecycle are explained in the following sections:

- [Registering and assigning incident requests as support staff on page 67](#)

- [Resolving and closing incident requests as support staff on page 97](#)
- [Working with incident requests as a manager on page 117](#)

## Support staff roles

For the incident management process, the SMPM defines the following support staff roles.

**Service Desk Analysts** are usually first-line support staff. A service desk analyst's responsibilities include:

- Providing the interface between the service owner organization and its customers.
- Obtaining accurate and complete information from the user when creating the incident request, and doing so efficiently and accurately.
- Resolving as many of their registered incident requests as possible within the limitations of their access rights and their time constraints.
- Ensuring that the incident requests that they have registered, but which they are unable to resolve, are assigned to the most appropriate group for resolution.
- Validating incident request resolutions with their users.

**Specialists** are usually second-line and third-line support staff. They are considered subject matter experts. Their main responsibility is to provide an accurate analysis and a diagnosis of their assigned incident requests to restore service to the affected users. A specialist's responsibilities include:

- Resolving incident requests.
- Updating incident requests with relevant information and status changes.
- Escalating incident requests, for which resolutions can be implemented only through the change management process, to the owner of the affected service.

## Manager roles

For the incident management process, the SMPM defines the following management roles.

**Group coordinators** are responsible for the quality and integrity of the incident management processes and for the work of their support group members. They

coordinate the assignment of incident requests to support staff. The group coordinator's other responsibilities include:

- Monitoring incidents.
- Monitoring open incidents requiring assignment.
- Managing the assignment of incidents to their appropriate support groups for resolution.
- Receiving notifications of incident assignments and escalations.
- Facilitating the resolution of escalated incidents in accordance with the escalation policy.
- Ensuring the resolution of incidents within the support group's service targets.
- Ensuring the overall completeness and accuracy of closed incidents.
- Reviewing reports.
- Ensuring that incidents requiring root cause analysis are copied into BMC Remedy Problem Management.
- Managing support group membership.
- Managing scripts, templates, and decision trees.

**On-Duty managers** take over the responsibility from service owners when the owner is not available to perform the incident escalation handling procedure. In these situations, the on-duty manager decides whether an escalated incident must be resolved by implementing an emergency change, by recovering the affected service at its continuity site, or by continuing the resolution of the incident within the incident management process.

**Service owners** create and assign incident requests. They also decide whether an escalated incident needs to be resolved by implementing an emergency change, by recovering the affected service at its continuity site, or by continuing the resolution of the incident within the incident management process.

## User role

A user is usually an employee who needs assistance from the IT support staff to resolve an incident or implement a change. Anyone in your organization can be a user.

The incident user's responsibilities include:

- Requesting support when necessary and providing the required information to help resolve the incident requests. They submit requests by filling out the Request form, or by contacting the service desk by email or telephone.
- Verifying the solution provided by the service owner organization and reopening the incident request if the solution is not acceptable.

## Mapping permission groups to SMPM roles

The following table maps the SMPM defined incident management roles to the equivalent permissions that each role needs in BMC Remedy Incident Management.

For more information about how SMPM roles map to BMC Remedy ITSM Suite, see the *BMC Service Management Process Model Role Mapping to BMC Remedy ITSM Suite* white paper.

### Note

This section does not list of all permission groups and functional roles defined in BMC Remedy Incident Management, only those that are mapped to SMPM roles.

**Table 5: Incident management role mapping**

SMPM role name	Calbro user	BMC Remedy Incident Management permission groups
Service Desk Analyst	FrancieStafford	<ul style="list-style-type: none"> <li>■ Incident Master</li> <li>■ Problem Viewer</li> <li>■ Infrastructure Change Viewer</li> <li>■ Asset Viewer</li> </ul>
Specialist	Ian Plyment	<ul style="list-style-type: none"> <li>■ Incident User</li> <li>■ Problem User</li> <li>■ Task User</li> <li>■ Infrastructure Change Viewer</li> <li>■ Asset Viewer</li> </ul>

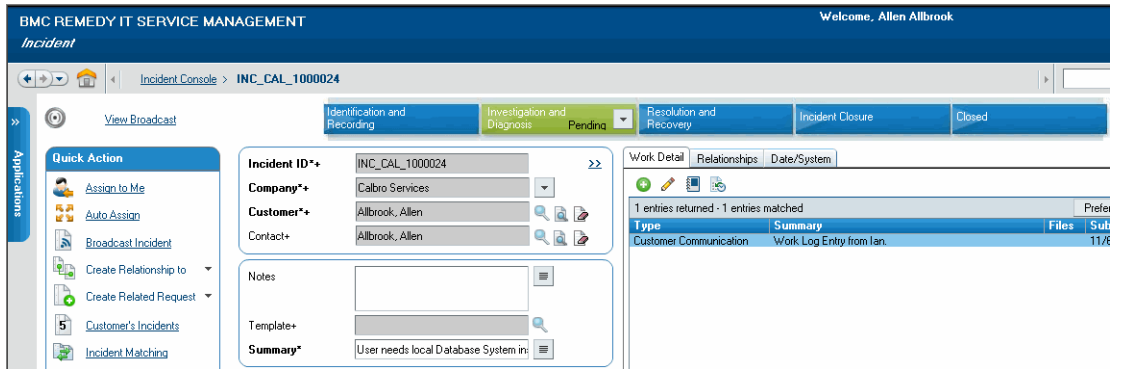


SMPM role name	Calbro user	BMC Remedy Incident Management permission groups
Group Coordinator	BobBaxter	<ul style="list-style-type: none"> <li>■ Incident User</li> <li>■ Problem User</li> <li>■ Infrastructure Change User</li> <li>■ Asset Viewer</li> </ul>
On-Duty Manager	MaryMann	<ul style="list-style-type: none"> <li>■ Incident User</li> <li>■ Problem Viewer</li> <li>■ Infrastructure Change Viewer</li> <li>■ Asset Viewer</li> </ul>
Service Owner	AllenAllbrook	<ul style="list-style-type: none"> <li>■ Incident User</li> <li>■ Problem Viewer</li> <li>■ Infrastructure Change Viewer</li> <li>■ Asset Viewer</li> </ul>
User	JoeUnser	<ul style="list-style-type: none"> <li>■ No BMC Remedy Incident Management permissions are needed.</li> </ul>

## Process flow and the lifecycle of an incident request

The Process Flow Status area displays the flow of the incident request through the stages of the process in blue. The current stage of the incident is highlighted in green. The status of the incident is indicated by both color and text.

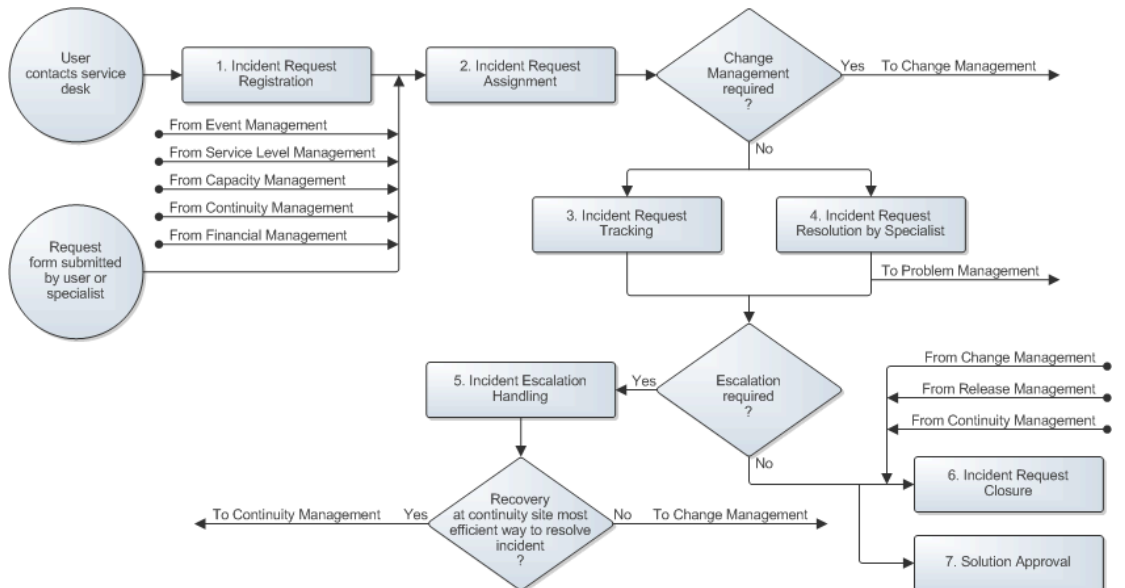
**Figure 5: The Process Flow Status area (Best Practice view)**



The Process Flow Status area also guides you through the stages of the incident lifecycle. At each stage, the diagram provides applicable accelerators. When you select an accelerator, you are prompted to enter the data required to complete the task. You can also enter optional recommended data in the dialog box.

The following figure provides an overview of the incident request lifecycle, as described by SMPM. Each of the major steps in the diagram corresponds to sections in [Registering and assigning incident requests as support staff on page 67](#), [Resolving and closing incident requests as support staff on page 97](#), and [Working with incident requests as a manager on page 117](#), where the steps and their associated tasks are explained in more detail.

**Figure 6: Incident Request lifecycle**



# Incident management use cases

This section describes common incident management use cases that you typically encounter as IT support staff. The Calbro Services user personas help to illustrate the use cases and ITIL good practices workflow, however, the use cases do not necessarily make reference to specific Calbro Service sample data.

The following use cases are described:

[Incident resolution—first call resolution on page 43](#)

[Incident resolution with assignment to specialist on page 45](#)

## Incident resolution—first call resolution

Francie Stafford is a service desk analyst who works on the Calbro Services service desk. She receives a call from Joe Unser, a Calbro Services benefits agents who cannot access one of his key applications, because he is locked out of his user account. Francie creates an incident request, resolves the incident for Joe, and then closes the incident request.

**Table 6: Incident resolution—first call resolution**

Role	Tasks and actions	Explanation
Customer	<p><b>Contacting the service desk</b></p> <ol style="list-style-type: none"> <li>1 Joe Unser, the service desk customer, phones Francie Stafford on the service desk</li> </ol>	Joe Unser needs to have one of his user accounts unlocked, and calls the service desk to open an incident request.

Role	Tasks and actions	Explanation
Service desk analyst	<p><b>Registering the incident request record</b></p> <ol style="list-style-type: none"> <li>1 On the Incident Management console, Francie clicks Create, to open a new incident request record.</li> <li>2 Francie enters the first few letters of Joe's email address on the incident request form and then presses Enter. The application matches the email address and fills in part of the incident request record based on the contents of Joe's People record.</li> <li>3 Francie selects the appropriate template to populate the new incident request record with basic information common to all requests of this type.</li> <li>4 In the template, Francie sees a set of work instructions that describe how to unlock Joe's account.</li> </ol>	<p>Francie Stafford receives Joe's call and, using the BMC Remedy Incident Management Best Practice view, creates a new incident request record using the applicable template.</p> <p>For detailed information about how to do this, see <a href="#">Creating an Incident request record using a template on page 76</a>.</p> <p>Francie is able to unlock Joe's account while he is on the phone.</p> <p>For detailed information about first call resolution, see <a href="#">First call resolution on page 85</a>.</p>
Service desk analyst and Service desk customer	<p><b>Closing the incident request</b></p> <ol style="list-style-type: none"> <li>1 After unlocking Joe's account, Francie asks him to confirm the account has been unlocked successfully by logging into his application.</li> <li>2 Joe is able to log in, and confirms this to Francie.</li> <li>3 Francie then enters the resolution in the Work Details tab (Work Info when using the Classic view), makes sure that all other required fields on the incident request record are completed, and then moves the incident request record's Status to Closed.</li> </ol>	<p>While Joe is still on the phone, Francie asks him to confirm that his account is unlocked and that he can log in to his system. Joe confirms this, so Francie updates the resolution field on the incident request record to indicate this. Francie closes the incident request record.</p> <p>For detailed information about closing incident request records, see <a href="#">Closing incident requests on page 111</a>.</p>

## Incident resolution with assignment to specialist

Francie Stafford receives another call from Joe Unser who, this time, cannot send documents to his local printer. Francie creates an incident request, but cannot resolve it herself. The incident request is automatically assigned to a specialist, Ian Plyment, who accepts the assignment and restores Joe's printer connection. Ian then closes the incident request.

**Table 7: Incident resolution with assignment to specialist**

Role	Tasks and actions	Explanation
Service desk customer	<p><b>Contacting the service desk</b></p> <ol style="list-style-type: none"> <li>1 Joe Unser, the service desk customer, phones Francie Stafford on the service desk</li> </ol>	Joe Unser cannot send documents to his local printer.
Service desk analyst	<p><b>Registering the incident request record</b></p> <ol style="list-style-type: none"> <li>1 On the Incident Management console, Francie clicks Create, to open a new incident request record.</li> <li>2 Francie enters the first few letters of Joe's email address on the incident request form and then presses Enter. The application matches the email address and fills in part of the incident request record based on the contents of Joe's People record.</li> <li>3 Francie selects the appropriate template to populate the new incident request record with basic information common to all requests of this type.</li> <li>4 After Francie completes the incident request registration and saves it, the incident request is assigned to an assignment group as specified in the template.</li> </ol>	<p>Francie Stafford receives Joe's call and, using the BMC Remedy Incident Management Best Practice view, creates a new incident request record from the applicable template.</p> <p>For detailed information about how to do this, see <a href="#">Creating an Incident request record using a template on page 76</a>.</p>

Role	Tasks and actions	Explanation
Specialist	<p><b>Accepting the assignment</b></p> <ol style="list-style-type: none"> <li>1 On the Incident Management console header, Ian selects his company in the Company field and his support group from the View By field.</li> <li>2 From the Defined searches area, he runs All Open Unassigned - All Priorities, which returns all of the open, unassigned incident requests for his support group.</li> <li>3 Ian selects Joe's incident request and opens it.</li> <li>4 In the Navigation pane, Ian selects Assign to Me and then changes the record's status to In Progress.</li> </ol>	<p>Ian Plyment is a specialist who works for the support group to which Joe's incident request is assigned. From the Incident Management console, Ian runs a defined search for all open, unassigned incident request for his support group. Joe's incident request is one of the records found by the search. Ian opens the record and accepts the assignment.</p> <p>For more information about how to run a defined search, see <a href="#">Running Defined Searches on page 157</a>.</p> <p>For more information about how to accept an assignment see <a href="#">Accepting an incident request on page 99</a>.</p>

Role	Tasks and actions	Explanation
Specialist	<p><b>Using Incident Matching to resolve the incident</b></p> <ol style="list-style-type: none"> <li data-bbox="420 352 868 449">1 From the Navigation pane on the incident request record, Ian opens the Incident Matching window.</li> <li data-bbox="420 495 868 659">2 On the Search Criteria Page 1 tab, Ian types Printer in the Summary Keyword Search field and selects Connectivity from the Operational Categorization Tier 1 menu.</li> <li data-bbox="420 705 656 730">3 He clicks Search.</li> </ol> <p>Any matching incidents, problem investigations, known errors, and solutions appear in the tabs at the bottom half of the dialog box.</p> <ol style="list-style-type: none"> <li data-bbox="420 926 868 1022">1 Ian views details of the matching records and finds information that helps him resolve incident request.</li> <li data-bbox="420 1068 868 1297">2 From the Relationship Type list on the Incident Matching window, Ian selects Resolved By and then clicks Relate With Solution. This copies the solution from the matching record to the Resolution field of the incident request record.</li> </ol>	<p>Ian uses the Incident Matching feature to determine the cause of Joe's incident and resolves it by restoring Joe's printer connection.</p> <p>For more information about using the Incident Matching feature, see <a href="#">To search for matching records – Classic view on page 86</a>. This section also discusses other methods to search for possible solutions.</p>
	<p><b>Completing the incident request</b></p> <ol style="list-style-type: none"> <li data-bbox="420 1409 868 1539">1 On the incident request record, Ian makes sure that all other required fields on the incident request record are completed</li> <li data-bbox="420 1585 868 1715">2 Ian then moves the incident request record's status to Resolved and provides a status reason of Customer Follow-Up Required.</li> </ol>	<p>Ian is unable to contact Joe directly to determine that his printing service is successfully restored, so he completes the incident request by moving the status to Resolved with a status reason of Customer Follow-Up Required. BMC Remedy Incident Management sends Joe an email asking him to contact the Service Desk to confirm that the incident is resolved. If Joe does not respond within a specific period of time, which is configurable for each installation, the auto close rule moves the incident request's status to Closed.</p> <p>For more information about Closing an incident request, including Completing an Incident Request, see <a href="#">Closing incident requests on page 111</a>.</p>

## Incident request resolution—emergency change request

This user scenario describes how to resolve an incident request with an emergency change request.

Joe Unser, a Calbro Services benefits agent, cannot access the local area network. He contacts the Calbro Service desk, and Francie Stafford, a service desk analyst, creates an incident request.

The incident request is assigned to Ian Plyment, a specialist in the support group assigned to Joe's company. Ian determines that Joe's data port is broken, and an emergency change is required to restore Joe's service.

Ian contacts Allen Allbrook, the owner of the service, to let him know that an emergency change is required. Allen assesses the risk and authorizes Ian to perform the work.

Ian then replaces Joe's data port and documents his actions in the incident request. Ian verifies with Joe that he can now access the local area network.

Ian closes the incident request and notifies Mary Mann, the change coordinator, of the emergency change so she can register the change. This ensures everyone can see what was changed, should the emergency change cause other incidents to occur. It also ensures that BMC Atrium CMDB is updated.

### Note

BMC Remedy Incident Management and BMC Remedy Change Management must be installed to follow this user scenario.

Detailed information about the individual actions mentioned in this user scenario are described in the *BMC Remedy Service Desk: Incident Management User Guide* and the *BMC Remedy Change Management User Guide*.

Table 8 on page 48 describes the typical steps involved in this user scenario.

**Table 8: Resolving an incident request with an emergency change**

Role	Actions	Explanation
Service desk customer	The customer contacts the service desk.	Joe cannot access the local area network.



Role	Actions	Explanation
Service desk analyst	<p>On the Incident console, the service desk analyst registers the incident request record.</p> <p>The analyst uses Incident Matching to search for a solution.</p> <p>When the specialist does not find a solution, the specialist completes the incident request registration and saves the record.</p> <p>The incident request is assigned to an assignment group as specified in the template.</p>	<p>Francie Stafford receives Joe's call and, using the BMC Remedy Incident Management Best Practice view, creates a new incident request record from the applicable template.</p>
Specialist	<p>The specialist accepts the assignment: On the Incident console, the specialist searches for incident requests that are assigned to his support group, but not to an individual.</p> <p>The specialist opens the customer's incident request and assigns it to himself. In the work details, the specialist specifies that the incident request is being handled according to the emergency change protocol.</p>	<p>Ian Plyment is a specialist working for the support group that supports Joe's company. Ian searches for all open, unassigned incident requests for his support group. Joe's incident request is one of the records found by the search. Ian opens the record and accepts the assignment.</p> <p>Ian investigates Joe's incident request and determines that his data port is broken. The fix requires an emergency change. Ian contacts Allen Allbrook, the owner of the affected service, to tell him this incident request requires an emergency change. Ian also notes this in the Work Detail tab of the incident request.</p> <p>Allen analyzes the risk and impact of the emergency change request and then authorizes Ian to implement the emergency change.</p>
Specialist	<p>The specialist implements the change and records all work in the incident request. The specialist contacts the customer to verify that the affected service has been restored. The specialist closes the incident request.</p>	<p>After the change is implemented and verified, Ian closes the incident request and asks Mary Mann, the change coordinator, to register a change for this emergency change. This ensures everyone can see what was changed, in case the emergency change causes incidents to occur. This also makes sure Allen, the service owner, is informed and BMC Atrium CMDB is updated.</p>

Role	Actions	Explanation
Change coordinator	<p>The change coordinator creates an emergency change request.</p> <p>From the Incident form, the change coordinator creates a change request.</p> <p>This opens the Change Request form and copies information from the incident request record to the change request record.</p>	<p>From Joe's incident ticket, Mary creates the emergency change request. By creating the request from the incident request, much of the information is copied directly from the incident request record to the change request record. This saves time and ensures accuracy. While creating the emergency change request, Mary creates a relationship between Joe's incident request and the emergency change request.</p>

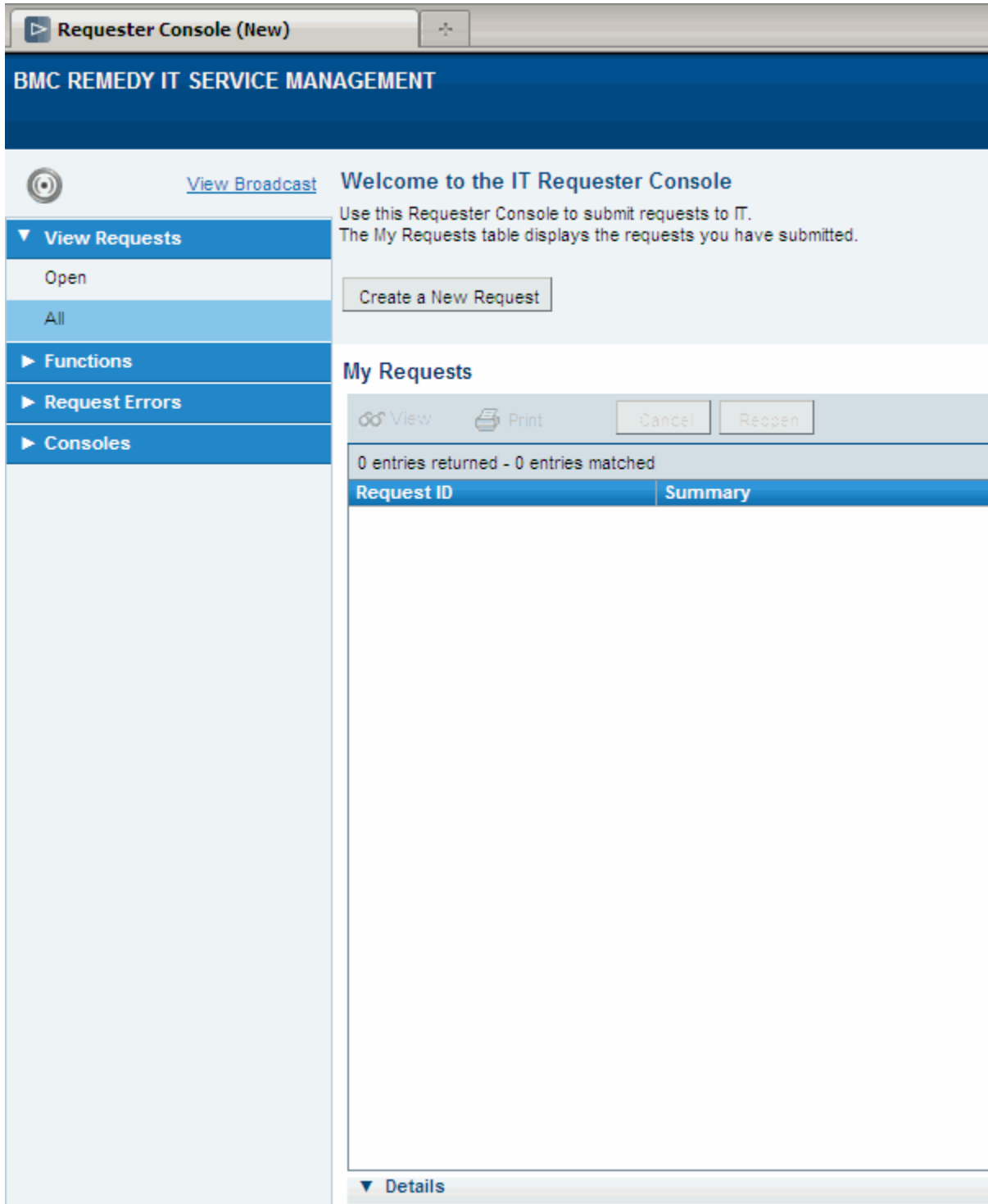
# Working with the Requester console

The Requester console enables users to quickly submit changes and incidents to BMC Remedy Change Management and BMC Remedy Incident Management.

**Note**

If you have BMC Service Request Management installed, the Requester console is replaced by *BMC Service Request Management User Guide*.

**Figure 7: Requestor console**



# Requester role

Users of the Requester console are usually employees who need assistance from the IT support staff. The user is typically an employee in the organization who must have a change implemented or an incident resolved. Any member of your organization can be a user.

However, the user *might* not be an employee. Non-employees can also be users because non-registered users can also submit service requests.

Traditionally, after a user made a telephone call to a central help desk, a support staff member logged the request. BMC Remedy Incident Management and BMC Remedy Change Management provide user self-provisioning. Using the Requester console, users can submit, track, and (in some cases) resolve their own requests. BMC Remedy Change Management and BMC Remedy Incident Management are preconfigured to work with the Requester console. However, an organization can decide to make the Requester console unavailable.

The Requester console is the primary interface for users to define and view their requests. From the Requester console, you can define a request that is submitted to BMC Remedy Change Management or BMC Remedy Incident Management. You can also view requests and respond to a survey after the request has been resolved.

## Requester console users

The following permissions can be used for accessing the Requester console to submit service requests:

- **Request Master** – This user is responsible for troubleshooting service requests. The request master can view requests submitted by other users and view the details of a record in the Service Request form. This user is more of an administrator than a support user.
- **Registered User** – This user has a record in the People form, and the user's AR login information is in the Login/ Access Details tab of the People form or in the BMC Remedy AR System User form.
- **Unknown User** – All other users are considered to be unknown users even if they have a record in the People form. If a user's login information is not in the People form, the user is considered an unknown user.

---

**Note**

For unknown users who do not have an BMC Remedy AR System login to be able to access the Requester console, the BMC Remedy AR System server *Allow Guest User* option must be selected. The Allow Guest User option is unavailable in multi-tenancy mode (for more information about multi-tenancy, see the *BMC Remedy IT Service Management Guide to Multi-Tenancy*). Also, the AR Submitter locked mode option must be selected for users with a read-only license to respond to surveys. A default People record with a valid BMC Remedy AR System login must be defined in the application for use by unknown users. For more information, see the *BMC Remedy IT Service Management Administration Guide*.

---

If a user meets any of the following conditions, the user type is *unknown user*:

- The user has an entry in the People form and in the BMC Remedy AR System User form, but does not have a BMC Remedy AR System login ID in the People form.
- The user has an entry in the People form, but does not have an entry in the BMC Remedy AR System User form or an BMC Remedy AR System login ID in the People form. This type of user is also a BMC Remedy AR System guest user.
- The user does not have an entry in the People form but has an entry in the BMC Remedy AR System User form.
- The user does not have an entry in the People form or in the BMC Remedy AR System User form. This type of user is also an BMC Remedy AR System guest user.

Additional factors that control access to the Requester console by unknown users follow:

- Unknown users are not allowed access if the multi-tenancy option is selected. Multi-tenancy restricts access of data from different companies or business units.
- In addition to setting the Tenancy Mode to Single-Tenancy, the Allow Unknown Users option must be set to Yes and login information added.

The console is the entry point for users to define, view, update, or cancel service requests.

## Working with service requests

This section describes working with service requests.

## Defining a service request

BMC recommends the New Request wizard as a simplified method of submitting service requests. You can also define service requests from the Change and Incident Request forms.

### To define a service request

- 1 From the Requester console, click **Create a New Request**.

Pay careful attention to the following items for the Requester section:

- If you are a registered user, the fields in the Requester section are filled from your People record. You can edit only the Phone and Email fields.
- If you are an unknown user, the First Name and Last Name fields are filled with your login information. The Company is filled with the company name. Unknown users must enter information in the Phone and Email fields.

- 2 Complete the required fields, as shown in bold with an asterisk.

- a Select a definition from the Summary list that best describes your issue.

If the list does not contain the specific request to log, type a summary of the request in the Summary field.

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#### *Note*

If BMC Remedy Incident Management is installed, entering a summary or ad hoc request” generates an incident request. If only BMC Remedy Change Management is installed, a change request is generated.

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If you select a summary definition that is an incident request, then related solution database entries appear in the Possible Solutions table. If, however, BMC Remedy Problem Management is not installed, possible solutions do not appear for manually entered summaries or selected summary definitions.

If there is a solution database entry that might be valid, click the entry, and then click **View**. Review the solution entry. If the solution resolves your request, click **Use Solution**.

If you choose a matching solution, the solution entry is related your request and the request is resolved automatically.

- b Select an Urgency level for your request.
- c If you do not have a record in the People form, enter your company, first name and last name.

- 3 (Optional) Click **Add Attachment** to enter request work information. You can include a note or an attachment.
- 4 Complete the optional fields:
  - **Date Required** – Enter the date when you need the request to be completed.
  - **Phone** – Enter or edit your phone number.
  - **Email** – Enter or edit your email address.
- 5 Click **Save**.

The request appears in the Requests table.

## Service request state changes

For changes and incidents, the Requests table provides the status of its underlying service request. Users are notified by email when a service request undergoes a status change, for example, when a service request is moved from In Progress to Completed or a change request reaches the Completed state.

## Performing additional service request functions

In addition to defining a service request, you can perform the functions listed in the following table. All the listed functions are performed from the Requester console.

**Table 9: Additional service request functions**

Function	Action
Filter your service requests	Click the appropriate link from the View Requests section, located in the Navigation pane, and then select Open or All. <b>Note:</b> Open is the default view. To change the default view, select another sort option, and then click Save As Default View.
View a service request	From the Requests table, select the service request, and then click View. Only the requests that the logged in user has submitted appear in the Requests table. Change requests are prefixed with CRQ and Incident requests are prefixed by INC.



Function	Action
Add work information	<p>From the Requests table, select the service request, and then click View. Click the Add Work Info link in the console's Functions section of the Navigation pane.</p> <p>You can add:</p> <ul style="list-style-type: none"> <li>■ A summary of the work log in the Summary field.</li> <li>■ Additional information in the Notes field.</li> <li>■ An attachment. You can add only one attachment for each work information entry. To add multiple attachments, add multiple work information entries.</li> </ul>
Search for a request by request ID	In the Functions area of the Navigation pane, click Search by Request ID, and then enter the complete Request ID or the numeric part of the ID.
Print a service request	<p>From the Requests table, select the service request, and then click Print. Review the report, and then click the Print icon on the toolbar.</p> <p><b>Note:</b> If you are having problems printing from BMC Remedy User, choose Tools &gt; Options in BMC Remedy User. On the Advanced tab of the Options dialog box, make sure the ODBC Use Underscores option is selected.</p>
Cancel a service request	<p>From the Requests table, select the service request, and then click Cancel. The Status changes to Canceled.</p> <p>You can only cancel a service request that is open.</p>
Reopen a request	<p>From the Requests table, select the service request, and then click Reopen. The Status changes to New, Staged, or In Progress.</p> <p>You can only reopen service requests that are completed or rejected.</p>
Complete a survey	From the Functions area of the Navigation pane, click View Survey, select a survey, and then click Respond. Type your responses to the questions, and then click Save.
View broadcast messages	<p>View the broadcasts by clicking the Broadcast link in the Navigation pane.</p> <p><b>Note:</b> If there are new broadcasts, the label on the link changes to New Broadcast, and the color of the link changes from gray to red.</p> <p>To view more details, select a broadcast entry, and then click View.</p> <p>Broadcasts are filtered by the logged-in user's company. If the logged-in user's company cannot be determined, only Global broadcasts appear. Only Public" messages are shown to the users.</p>

## Troubleshooting service requests with errors

If the service request cannot be completed because of an error from BMC Remedy Change Management or BMC Remedy Incident Management, you can view which service requests contain errors and review the event log to troubleshoot the service

request. If the error is the result of integration or other configuration issues, you can also see the *BMC Remedy IT Service Management Administration Guide* for information to help you troubleshoot the problem.

---

**Note**

To see service requests with errors, you need Command Event Master permissions in addition to Requester console Master permissions.

---

### To view requests with errors

- 1 From the Navigation pane of the Requester console, choose **Request Errors => View Requests with Errors**.
- 2 Click the **Change/Incident Data** tab.
- 3 Click **Reset Error** to restart the service request.

Users can now continue to work on the service request.

- 4 Click **View Events** to review the event log and troubleshoot the service request.
- 5 View the event details:
  - Protocol
  - Access Mode
  - Error Code
  - Error Message
- 6 Take any of the following actions for events that are in error:
  - Retry
  - Ignore

It is best to retry each event in the order the events are generated. By default, the event table is sorted with the recent event on top, in reverse chronological order. Typically events should be retried when the problem indicated by the error message has been fixed.

---

**WARNING**

Delete service requests with caution. They cannot be recovered. You must have BMC Remedy AR System administrator permissions to delete service request records.

---

# Viewing service request details from an incident request form

If someone submits a service request from which BMC Service Request Management subsequently generates an incident request, you can view information about the originating request from the incident request form. The information available includes the date on which the service request was submitted, who submitted it, and the related company. You can also view information about approvers, an activity log, and process flow diagram showing the request's status.

- 1 Open an Incident Request form.
- 2 In the navigation pane, click **Advanced Functions > View Service Request**.



# Working with the Overview console

The information in this section is for people who fulfill one or more of the following support roles:

- service desk analysts
- specialists
- group coordinators
- on-duty managers

Use the Overview console if you must respond to, manage, or track individual or group work assignments from a variety of sources. For example, if your company runs the full BMC Remedy ITSM Suite, either you or the group you manage might receive work assignments from BMC Remedy Incident Management, BMC Remedy Problem Management, and BMC Remedy Change Management. From the Overview console, you can quickly get information about all your work assignments and perform the procedures that you use most often.

## Functional areas

This section describes the functional areas of the Overview console.

**Table 10: Overview console functional areas**

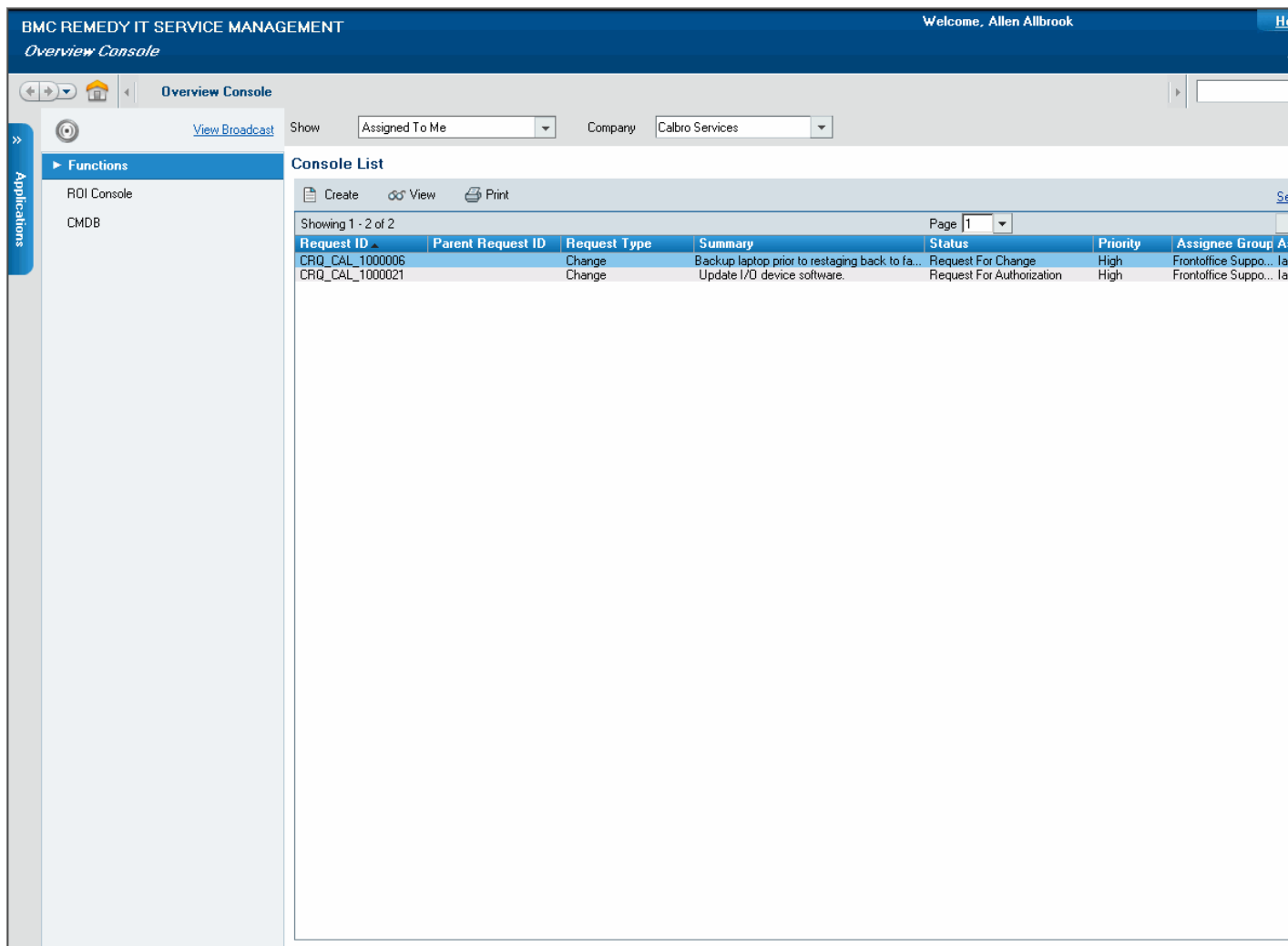
Functional area	Purpose
Overview console header	

Functional area	Purpose
Show	<p>This field provides a filter by which you can manage the contents of the Console List table. The choices are:</p> <ul style="list-style-type: none"> <li>■ <b>All</b> – Shows all records</li> <li>■ <b>Submitted by Me</b> – Shows all records submitted by you.</li> <li>■ <b>Assigned to Me</b> – Shows all records assigned to you.</li> <li>■ <b>Assigned to My Selected Groups</b> – Asks you to select one of the groups to which you belong, and then displays the records assigned to that group.</li> <li>■ <b>Assigned to all My Groups</b> – Displays the records assigned to all of the support groups to which you belong.</li> </ul>
Refresh	Refreshes the data in the tables.
<b>Navigation pane</b>	
View Broadcast, or New Broadcast	<p>Opens the broadcast dialog box, from where you can view, create, modify, and delete broadcasts.</p> <p>When there are unread broadcast messages, this area displays a message: New Broadcasts, followed by the number of new messages. When there are new broadcast messages, the area also turns red.</p> <p><b>Note:</b> If you open the Overview console with no new broadcast messages, but the View Broadcast link is red, open the Application Preferences dialog box and make sure that a Console View preference has been selected.</p>
Functions	<p>Use the links in this area to do the following actions:</p> <ul style="list-style-type: none"> <li>■ <b>Select Status Values</b> – Use this link to open a dialog box from which you can filter the console to show only records that match the conditions that you specify. This filter works in conjunction with the Show field.</li> <li>■ <b>My Profile</b> – Allows you to change the information associated with your login profile. For example, if your title changes or if you move to a new office location, use this link to open the People form and update your title or location, and so on.</li> <li>■ <b>Application Preferences</b> – Set your program preferences and options.</li> </ul>
IT Home Page	Use this link to open the IT Home Page.
ROI Console	Use this link to open the Return on Investment (ROI) console.
CMDB	Use this link to open the BMC Atrium CMDB.
<b>Console list panel</b>	

Functional area	Purpose
Create	Creates a new record.
View	Displays a form containing detailed information about the selected record in the Console list table.
Print	Prints the selected record.
Search for Ticket	<p>Opens a dialog box from which you can select the type of ticket you are searching for. After you select the type of record from the menu, click the Select button to open a search form specific to the type of ticket you are searching for.</p> <p><b>Note:</b> To see activity records and CI unavailability records, you must search for those tickets, because these records are not displayed in the Console List table.</p>
Preferences	Using Preferences, you can control the appearance of the Console List table. For example, you can add or remove a column.

Functional area	Purpose
Console list table	Lists the different types of requests.

**Figure 8: Overview console**



## Console list table

The Console list table lists different types of requests. The types of requests that you can choose from depend on the applications that are installed.

A specific prefix identifies each type of request:

- **CRQ**—Identifies change requests. To view and define change requests, BMC Remedy Change Management must be installed.



- **RLM**—Identifies release requests. To view and define release requests, BMC Remedy Change Management must be installed.
- **TAS**—Identifies tasks.
- **SDB**—Identifies solution database entries. To view and define solution entries, BMC Remedy Service Desk must be installed.
- **INC**—Identifies incidents. To view and define incidents, BMC Remedy Service Desk must be installed.
- **PBI**—Identifies problems. To view and define problems, BMC Remedy Service Desk must be installed.
- **PKE**—Identifies known errors. To view and define known errors, BMC Remedy Service Desk must be installed.
- **PR**—Identifies purchase requisitions. To view and define purchase requisitions, BMC Remedy Asset Management must be installed.

You can also change the table's contents by using the Show filter at the top of the console.

## Selecting status values

You can use the Select Status Values dialog box to filter the requests that appear in the Overview console based on their status.

### To select status values

- 1 From the Navigation pane , choose **Functions => Select Status Values**.
- 2 In the Select Status Values dialog box, select the status values for each category from the lists, then click **OK** to close the dialog box.
- 3 If the Assigned Work table does not refresh with the filtered records, click **Refresh** to reload the table's contents.

## Configuring the Overview console to display tasks

This section describes how to configure the Overview console to display the tasks that are assigned to you.

The default behavior of the Overview console is to not display your tasks. If you want the Overview console to display them, then you must change the Show Task configuration option to Yes. You do this from the Task Management tab of the Application Preferences dialog box. You only need to perform this procedure once; the Overview console remembers this setting between sessions.

### To configure the Overview console to display tasks

- 1 From the Applications area of the IT Home Page, select **Foundation Elements => Overview console**.
- 2 From the Navigation pane of the Overview console, select **Functions => Application Preferences**
- 3 In the Application Preferences dialog box, click the **Task Management** tab.
- 4 From the Show Task menu, select **Yes** and then click **Save**.

Later, if you want to prevent the Overview console from displaying your tasks, then repeat the preceding procedure selecting **No** from the Show Task menu.

# Registering and assigning incident requests as support staff

The information in this section is for people who fulfill the support role of service desk analyst.

*Group coordinators* and *on-duty managers* should also be familiar with the information in this section to better understand the support staff tasks and so they can fulfill the role of support staff if necessary. Using the Incident Management console, support staff can create, track, and resolve incident requests. The tasks described by this section are organized according to the stages of the incident management lifecycle as described by the BMC Service Management Process Model (SMPM).

The following diagram illustrates the SMPM stages covered in this section.

**Figure 9: The SMPM stages covered in this section**



## Functional areas of the console

This section describes the areas of the Incident Management console and the features and functions that you can access from them.

The following figure illustrates the functional areas of the Incident console. The following table describes what you can do in each of the functional areas.

**Table 11: Incident Management console functional areas**

Functional area	Purpose
<b>Incident Management console header</b>	
Breadcrumb bar	A navigation aid that contains links to related records that you opened from the current incident request.
Breadcrumb navigation controls	<p>Back button – takes you back one link in the breadcrumb trail.</p> <p>Forward button – takes you forward one link in the breadcrumb trail. The Forward button is only visible if you have returned to a record on the breadcrumb trail that you previously viewed</p> <p>Drop down menu – contains links to all the records that you have viewed from the current incident request, including records that might not be currently visible in breadcrumb trail.</p> <p>Home icon – takes you to the IT Home page.</p>
Search	If you have BMC Remedy Knowledge Management installed, this search feature lets you search across multiple forms for records that match a key term. For more information about using this search, see <a href="#">“Using Global search” on page 160</a> .

Functional area	Purpose
Show Filter By Magnifying glass icon More filters	<p>This area contains the following fields: Show, Filter By and Advanced. These fields combine to provide a way that you can filter the incident request records in the Incidents table.</p> <p>The Show field has a menu from which you select the basic criteria by which you want to filter the contents of the Incident table, the menu choices include:</p> <ol style="list-style-type: none"> <li>1 Submitted by me – all incident requests submitted by you.</li> <li>2 All – all incident request, regardless of who submitted them.</li> <li>3 Assigned to me – all incident requests assigned to you.</li> <li>4 Assigned to my group – all incident request assigned to a specific support group of which you are a member. If you select this, you are prompted to select the support group.</li> <li>5 Assigned to all my groups – all incident requests assigned to all of the support groups of which you are a member.</li> <li>6 Watch List – all incident requests on the Watch List</li> </ol> <p><b>Note:</b> If you select Watch List, then Filter By is not available.</p> <p>The Filter By field places conditions on the basic criteria that you choose in the Show field. This helps you manage the number of records returned by the Show field. If you select Assigned to me in the Show field and All Open &gt; All Priorities from the Filter By field, then the Incidents table contains all open incidents, regardless of their priority, that are assigned to you.</p> <p>The Magnifying glass icon opens the Managem My Searches dialog box from which you can edit, save, and delete custom searches. Saved custom searches appear in the My Searches node of the Defined Searches list. For more information about Manage My Searches, see "Creating a custom search," later in this guide.</p> <p>More filters provides a way for you to further filter the contents of the Incidents table. If you still have a large number of records after using the Filter By field, click Advanced to open a dialog box that contains fields in which you can indicate even more precise information, such as product or operational categories. For example, using the advanced field you can add the product category Hardware to the filter. When added to the Show and Filter by fields, the Incidents table now contains all open hardware incidents, regardless of their priority, that are assigned to you. An active funnel icon appears beside More filters to show when a filter from this area is active.</p>
Refresh	Updates the console with the latest information.
<b>Navigation pane</b>	

Functional area	Purpose
View Broadcast, or New Broadcast	<p>Opens the broadcast dialog box, from where you can view, create, modify, and delete broadcasts.</p> <p>When there are unread broadcast messages, this area displays a message: <i>New Broadcast</i>, along with the number of new messages. When there are new broadcast messages, the area also turns red.</p> <p>See <i>Broadcasting messages</i> in this table.</p> <p><b>Note:</b> If you open the console with no new broadcast messages, but the View Broadcast link is red, open the Application Preferences dialog box and make sure that a Console View preference has been selected. For information about how to view and select the Console View preference, see <i>Setting application preferences</i> in this table.</p>
Counts	<p>This area contains incident request metrics. The numbers relate to the selection in the Show field. For example, if the Show field contains Submitted by me, then the metrics that appear in this area show the open, unassigned, unacknowledged, and breached incidents that were submitted by you.</p>
Functions	<p>Use the links in this area to do the following actions:</p> <ul style="list-style-type: none"> <li>■ <b>New Incident</b> – Create a new incident request record.</li> <li>■ <b>Search Incident</b> – Search the database for current incident request records.</li> <li>■ <b>My Profile</b> – Set your profile.</li> <li>■ <b>Application Preferences</b> – Set your application preferences and application options.</li> <li>■ <b>Reminders</b> – View and create reminders.</li> <li>■ <b>Reports</b> – Create and run custom reports.</li> <li>■ <b>Manage CIs</b> – Search for information about specific CI types and gives you access to the CI records.</li> <li>■ <b>Manage Inventory</b> – Access the Manage Inventory form of BMC Remedy Asset Management.</li> <li>■ <b>Surveys</b> – Review and respond to customer surveys.</li> <li>■ <b>KPIs</b> – Click the KPIs link to select and to view the incident management dashboards. The dashboards that appear represent, in graphical format: <ul style="list-style-type: none"> <li><i>Process KPI</i> – See <i>Using the KPI dashboards</i> for information about how to use these dashboards.</li> <li><i>Total Open Incidents</i> – Click either All Open or By Status and Priority.</li> </ul> </li> </ul>

Functional area	Purpose
Applications	This area contains links to other BMC applications, consoles, and modules. The contents of this area depend on what other applications and so on are installed. Click the double greater-than sign to open or close this panel.
<b>Incidents table</b>	
Quick Actions	Select the action from the menu. You can perform the following quick actions: <ul style="list-style-type: none"> <li>■ <b>Assign to group member</b> – Reassigns the incident request to another member of your group.</li> <li>■ <b>Assign to me</b> – Reassigns the incident request to yourself.</li> <li>■ <b>Incident Closure</b> – Moves incident requests with a status of Resolved to the Closed status.</li> </ul>
Process Overview	Opens the detailed Incident Management process in SMPM, if the full SMPM application is installed and configured. Otherwise, it opens a high-level diagram of the incident management process.
Print	Prints the selected record in the Watch List and the Incidents table.
View	Shows the incident request record that is selected in the Incidents table.
Create	Creates a new incident request record.
Table	A list of the incident request records according to the company selected in the Company field and the group selected in the View By field.
<b>Detail and Tasks</b>	
<p><b>Details</b> – When selected, contains detailed information about the record selected in the Incidents table. To see Incident Details when the Tasks table is showing, click Show Details. The Create, View, and Report icons relate to work information notes. For information about working with work information notes, see Creating work information entries.</p> <p><b>Tasks</b> – When selected, lets you view tasks associated with the incident request record selected in the Incidents table. To see Tasks when Details is showing, click Show Tasks.</p>	

## Managing service targets

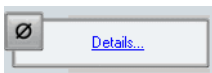
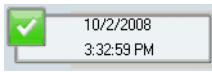
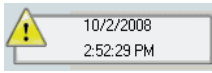
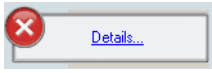
If the BMC Service Level Management (BMC SLM) application is installed, the Incident Request form shows both overview and in-depth information about the incident in relation to the applicable service targets.

You can view request-based service targets attached to incident requests. This enables you to see whether the service target has been met, missed, or is in a warning state.

### To view service targets related to an incident request

- 1 From the Incident Management console, open the relevant incident request record.
- 2 View the SLM Status icon from the Navigation pane. The following table describes the SLM Status icon states.

**Table 12: BMC SLM Status icons**

Icon	Description
	<ul style="list-style-type: none"> <li>■ Status: Not Attached.</li> <li>■ No service target is attached to the incident.</li> </ul>
	<ul style="list-style-type: none"> <li>■ Status: Attached.</li> <li>■ Green: The service targets are in compliance.</li> </ul>
	<ul style="list-style-type: none"> <li>■ Status: Warning.</li> <li>■ Yellow: At least one service target is at risk.</li> </ul>
	<ul style="list-style-type: none"> <li>■ Status: Breached.</li> <li>■ Red: At least one service target did not meet its goal.</li> </ul>

- 3 Click the icon to display the SLM:IntegrationDialog form to see in depth information about the incident in relation to the applicable service targets.

The status gauge on the SLM:Integration Dialog form shows the current status of the selected service target. The following table explains the colors and fields on the status gauge.

**Table 13: Status gauge on the SLM:Integration Dialog form**

Color or field	Description
Green	The service target is in compliance.
Yellow	The service target has a warning status.
Red	The service target has missed its goal.



Color or field	Description
Due Date and Time	The goal time within which either a response or a resolution for the incident must occur; otherwise the goal is missed.
Time Until Due	The amount of time left until the goal is considered missed.
Time Past Due	The amount of time that has passed since the goal was due.

The following table describes the information in the SLM:IntegrationDialog form.

**Table 14: Information about the SLM:IntegrationDialog form**

Field	Description
Incident ID	The ID of the incident.
Details	Click to see details about the selected service targets.
Service Target table	
SVT Title	The name of the service target.
Goal	The type of goal for the service target: <ul style="list-style-type: none"> <li>■ Response-time goal – The incident request must be responded to within the time specified.</li> <li>■ Resolution-time goal – The incident request must be resolved within the time specified.</li> </ul>
Hours/Min	The response or resolution time stipulated in the goal.
Cost Per Min	The cost per minute for missing the response or resolution time goal.
Due Date/Time	The goal time within which either a response or a resolution for the incident must occur; otherwise the goal is missed.

Field	Description
Progress	<p>The status of the service target:</p> <ul style="list-style-type: none"> <li>■ Attached – The service target has been attached to the incident.</li> <li>■ Detached – The service target has not been attached to the incident.</li> <li>■ In Process – Work on the request is taking place.</li> <li>■ Pending – Work on the request is stopped (for example, waiting for a part, or waiting for a response from the submitter).</li> <li>■ Warning – The service target is at risk.</li> <li>■ Missed or Met – The service target has either missed or met its goal.</li> <li>■ Invalid – The service target is disabled.</li> </ul>
Milestones for SVT	
Title	The title of the milestone.
Execution Time	The time that the milestone actions are executed.
Status	The current status of the milestone. The status is either active or inactive (pending), or Action Performed.

For more information about service targets and milestones, see the *BMC Service Level Management User Guide*.

## Registering incident requests

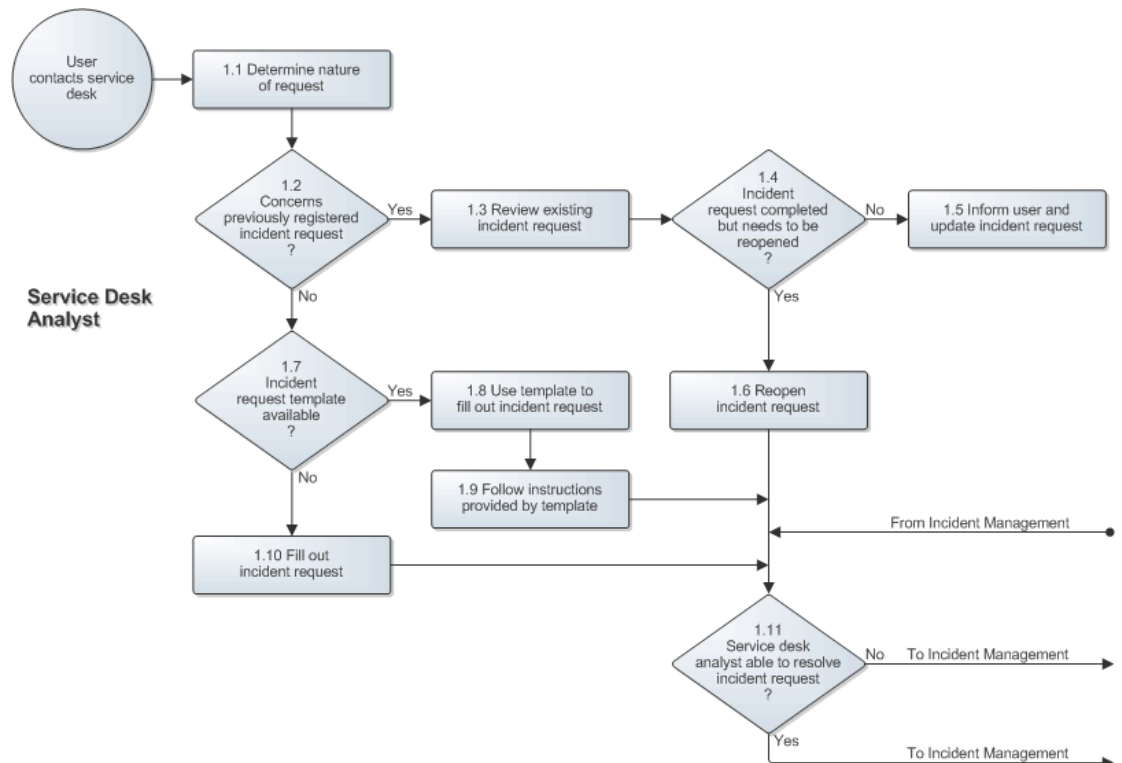
When a user contacts the service desk with an incident request, you first determine the nature of the request. If the request is about a previously registered request, you query the request and update the user with the current status.

If the request concerns an incident that was resolved, but for which the resolution was not effective, reopen the incident request record and assign the incident to a specialist.

If this is a new incident request, you create a new incident request record by capturing key information about the user and the incident. If possible, you resolve the incident immediately and then complete the incident request, otherwise you make sure the incident request is assigned to the appropriate group.

The following figure provides an overview of the registering incident requests process, as described by the SMPM.

**Figure 10: Registering incident requests**



## Reviewing the status of an incident request

If a customer calls to enquire about the status of a registered incident request, you can quickly review all of the customer's active records (that is, records that do not have a status of Closed) from the incident request form, using the following procedure.

### To review the status of an incident request

- 1 From the Incident Management console, click **Create**.
- 2 In the Customer or Contact field on the new Incident Request form, type the customer's or the contact's information as described in Using the Customer and Contact fields in Best Practice view, elsewhere in this guide.
- 3 When the application updates the new incident request record with the customer's information, In the Quick Actions area, click **Customer's Incidents**.
- 4 In the Customer's Incidents window, select the incident request you are reviewing the status for and click **View**.

- 5 When you finish reviewing the status in the Incident Request Information window, choose one of the following actions:
  - **Close**—returns you to the Customer’s Incidents window. Choose this to review more incident records for the customer.
  - **Close All**—returns you to the Search form. Choose this when you are finished.

## Viewing incident request records

Use the following procedure when you want to view the an incident record in detail.

### To view an incident request

- 1 In the Incidents table, double-click the incident request you want to view.

Fields on the form display the incident status and other information that has been collected about the incident.

## Creating an Incident request record using a template

The purpose of this stage is to accurately record and recognize disruptions to services provided by IT to its customers. When creating a new incident request record, you classify the incident and record user information, CI information, and a description of the incident.

The key to this activity is the accuracy and completeness of the information recorded. To help ensure accuracy and completeness, BMC recommends that you use a template to help create the record. A template ensures consistency in the way information about the incident request is captured. A template can also set a relationship to a CI. Your administrator can define templates for commonly occurring incidents, as described in the *BMC Remedy IT Service Management Administration Guide*.

### To use a template

- 1 On the Incident Management console, click **Create**.
- 2 Enter the Customer or Contact information as described in the following table.

When using the Best Practice view	When using the Classic view
In the Customer or Contact field on the new Incident Request form, type the customer's or the contact's information as described in <a href="#">Using the Customer and Contact fields in Best Practice view on page 35</a> .	On the Incident Request form, type the customer's last name in the Last Name field and press ENTER. If there are multiple customers with the same last name, you are prompted to select the appropriate customer. The Company, First Name, and Phone Number fields are completed from the customer record. The company drives the selection on other menus, such as Operational, Product, and Resolution.

- 3 Check the rest of the customer information for accuracy.
- 4 Type the incident request details in the Notes field.
- 5 Open the Incident Template Selection form as described in the following table.

When using the Best Practice view	When using the Classic view
<p><b>If you know the template name</b></p> <ul style="list-style-type: none"> <li>■ Type a portion of the template name in the Template field and then press Enter.</li> </ul> <p><b>If you don't know the template name</b></p> <ul style="list-style-type: none"> <li>■ Click inside the Template field and then press Enter.</li> </ul>	From the Quick Links section of the Navigation pane, click <b>Select Template</b> .

A list of templates available to your default support group appears in the Viewing Templates for Support Group area of the Incident Template Selection form.

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**Note**

If you belong to multiple support groups, you can select a template from another of your support groups by selecting a different group from the Viewing Templates for Support Group menu at the top of the form.

---

- 6 From the hierarchical list, select the appropriate template and then click **Select**.
- 7 Type a brief description in the Summary field.
- 8 Select the business service CI from the Service list.

You must select the business service CI from the menu. The business services that appear in this menu have a relationship type of "Used By" either for the customer directly or the organization the customer belongs to.

- 9 If the incident request was caused by a CI, you can record the CI in the CI field. This creates a relationship between the incident request record and the CI record.

The CIs that appear in the menu are all the other CIs related to the customer that are not business service CIs. If there are no CIs related to the customer, click the button beside the CI field to open a CI search form, from which you can search for all CIs.

- 10 Complete the rest of the incident request form as appropriate.

---

**Note**

Use the Contact field to record the name of someone who reports an incident on behalf of someone else. Use this field, for example, if an administrative assistant is reporting an incident on behalf of an executive. By using the Contact field, you can type the name of the person who is experiencing the incident in the Customer field. This is especially important if the person experiencing the incident is registered as a VIP or as a sensitive customer. It also ensures that the BMC Remedy Incident Management application displays the correct set of business CIs in the Service field selection list, and so on.

---

**Tip**

If your template does not supply categorizations (Operational Categorization and Product Categorization), you can open a dialog box where you record this information by clicking Categorizations in the Links area when using the Best Practice view or the Classification tab when using the Classic view.

---

- 11 Click **Save**.

## Creating an incident request record without a template in Classic View

If your system does not have templates defined, use the following procedure to create an incident request in the Classic view.

### To create an incident request record using the Classic view

- 1 In the Navigation pane, select **Functions => New Incident**.
- 2 In the Process Flow Status area, click the arrow in the Identification and Recording box.
- 3 Select **Next Stage => Investigation and Diagnosis**.

You can move directly to the Resolution and Recovery stage or the Incident Closure stage by selecting the appropriate stage.

The Incident Request form appears. The tabs on this form prompt you to enter required and optional information.

---

**Note**

This is a dynamic form. The fields on the Required and Optional tabs depend on the information to move from the current stage or state to the selected stage or state.

---

- 4 On the Incident Request form, type the customer's last name in the Last Name field and press ENTER.

If there are multiple customers with the same last name, you are prompted to select the appropriate customer. The Company, First Name, and Phone Number fields are completed from the customer record. The company drives the selection on other menus, such as Operational, Product, and Resolution .

- 5 Type a brief description in the Summary field.
- 6 You can type additional details in the Notes field.
- 7 Select the business service CI from the Service list.

You must select the business service CI from menu. The business services that appear in this menu have a relationship type of "Used By" either for the customer directly or to the customer's organization.

- 8 If the incident request was caused by a CI, you can record the CI in the CI field. This creates a relationship between the incident request record and the CI record.

The CIs that appear in the menu are all the other CIs related to the customer that are not business service CIs. If the CI you are looking for does not appear in this list, click the button beside the CI field to open a CI search form, from which you can search for all CIs.

- 9 Select values from the Impact and Urgency lists.
- 10 If appropriate, select a different service company.

When you select the customer, the service company is set to the customer's company.

- 11 Select the appropriate service type:
  - **User Service Restoration** – Use this service type for typical service restoration requests (for example, a request to restore printing services).

- **User Service Request**— Use this service type if the incident request is a simple question or a request for information (for example, a request for how to" information).
- **Infrastructure Restoration**— Use this service type if the incident request is more focused on the restoration of infrastructure service. Typically, these types of incident requests are reported by system management tools (for example, if an incident is detected on a piece of network infrastructure by system monitoring software).
- **Infrastructure Event**— Use this service type when a system management tool registers an event that does not require infrastructure restoration.

## 12 Click **Save**.

If you did not assign the incident, the incident is automatically assigned based on predefined assignment routing. If there is no appropriate predefined assignment routing, you are prompted to assign the incident.

## 13 If prompted, assign the incident; then click **Save**.

### **To create an incident request record using the Best Practice view**

Use the following procedure if you are using Best Practice view to create an incident request without a template. you can use

#### 1 In the Navigation pane, select **Functions => New Incident**.

The Incident Request form appears.

#### 2 In the Customer or Contact field on the new Incident Request form type the customer's or the contact's information as described in [Using the Customer and Contact fields in Best Practice view on page 35](#).

#### 3 You can type details about the incident in the Notes field.

#### 4 Type a brief description in the Summary field.

#### 5 Select the business service CI from the Service list.

You must select the business service CI from menu. The business services that appear in this menu have a relationship type of "Used By" either for the customer directly or to the customer's organization.

#### 6 If the incident request was caused by a CI, you can record the CI in the CI field. This creates a relationship between the incident request record and the CI record.



The CIs that appear in the menu are all the other CIs related to the customer that are not business service CIs. If the CI you are looking for does not appear in this list, click the button beside the CI field to open a CI search form, from which you can search for all CIs.

- 7 Select values from the Impact and Urgency lists.
- 8 Select the appropriate incident type:
  - **User Service Restoration** – Use this service type for typical service restoration requests (for example, a request to restore printing services).
  - **User Service Request** – Use this service type if the incident request is a simple question or a request for information (for example, a request for how to information).
  - **Infrastructure Restoration** – Use this service type if the incident request is more focused on the restoration of infrastructure service. Typically, these types of incident requests are reported by system management tools (for example, if an incident is detected on a piece of network infrastructure by system monitoring software).
  - **Infrastructure Event** – Use this service type when a system management tool registers an event that does not require infrastructure restoration.
- 9 Select the reported source.
- 10 Select the assigned group and the assignee.

If you do not assign the incident, the incident is automatically assigned based on predefined assignment routing. If there is no appropriate predefined assignment routing, you are prompted to assign the incident when you click **Save**.

---

**Note**

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The names that appear in the list of assignees depends on the assigned group you select.

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- 11 If you use an external vendor, select the vendor's name from the list and, if used, the vendor's ticket number.
- 12 Click **Save**.

## Overview of incident ownership

Incident ownership is determined automatically by BMC Remedy Incident Management when the incident request record is created. BMC Remedy Incident Management assigns incident ownership based on the following criteria:

- the support group of the person who submits the incident request record.
- the support group the incident request record is assigned to.  
For example, consider the following support groups:
- Support Group A has a support group role of Help Desk. Person A is in Support Group A.
- Support Group B does not have a support group role of Help Desk; for example, it might have a support group role of Tier 2. Person B is in Support Group B.
- Support Group C does not have a support group role of Help Desk; for example, it might have a support group role of Tier 3.

Based on these support groups, the following example events show how the incident owner is set when no incident owner assignment event is predefined:

- Person A submits an incident. Because Person A is a member of a support group with the role of Help Desk, ownership of the incident is set to Support Group A, regardless of who is assigned this incident.
- Person B submits an incident and assigns it to Support Group A. Ownership of the incident is set to Support Group A because the group has the role of Help Desk.
- Person B submits another incident, and assigns the incident to Support Group C. Support Group B becomes the owner, because Person B is the submitter.

## Adding or modifying a customer profile

Before you can record an incident, the customer must be listed in the People database. Customers are usually added to the People database by your administrator, as described in the *BMC Remedy IT Service Management Administration Guide*.

However, if you have Contact People User or Contact People Admin permissions, and a customer is not listed in the database, you can add a customer's profile from the Incident Request form. (If you are unsure about your permissions, ask your system administrator.) You can also modify the customer and the contact phone number and site directly on the Incident Request form. A modification directly on

the Incident Request form, however, applies only to the current incident, it does not update the People record permanently.

To update the People database permanently, you can open the People form from the Incident Request record, as described in the following procedure.

### To add a new, or modify a current, customer profile

- 1 Do one of the following actions.

To add a new customer profile	To modify a customer profile
From the Incident Management console click <b>Create</b> to create a new incident request record.	From the Incident Management console, open a current incident request record belonging to the customer whose profile you are modifying.

- 2 Do one of the following actions.

To add a new customer profile	To modify a customer profile
<b>When using the Best Practice view</b>	

To add a new customer profile	To modify a customer profile
<ul style="list-style-type: none"> <li>■ Click the magnifying glass icon to the right of the Customer or Contact field to open the People form.</li> </ul>	<p><b>To make modifications to the current record</b></p> <ol style="list-style-type: none"> <li>1 To modify the Company or Customer fields, click the eraser icon to the right of the Customer field to clear it and then complete the fields with the new information.</li> <li>2 To modify the Contact field, click the eraser icon to the right of the field to clear it and then add the new information.</li> <li>3 To update the Customer or Contact phone and site information, click the double arrow link above the Incident ID field.</li> </ol> <p>This toggles to an area that opens these fields.</p> <ol style="list-style-type: none"> <li>1 Click the pencil icon beside the field you are modifying.</li> <li>2 In the resulting dialog box, make the required changes.</li> <li>3 Click <b>OK</b> to save the changes and to close the dialog box.</li> <li>4 Click the double arrow link above the Customer Phone field to return to your starting point.</li> </ol> <p><b>To make permanent modifications</b></p> <ol style="list-style-type: none"> <li>1 Click either the <b>Customer</b> or <b>Contact</b> link.</li> <li>2 In the People form, make the required changes.</li> <li>3 Click <b>Save</b> and then Click <b>Yes</b> to save the changes and close the form.</li> </ol>
<p><b>When using the Classic view</b></p>	
<ul style="list-style-type: none"> <li>■ Click <b>Create</b> on the Customer tab.</li> </ul>	<ul style="list-style-type: none"> <li>■ Click <b>Modify</b> on the Customer tab.</li> </ul>

- 3 On the People form, complete or modify the required fields.

If adding a customer record, you do not need to add all the information for this individual's profile, only what is necessary to submit the record.

---

**Note**

You cannot define a Support Person record here. See the *BMC Remedy IT Service Management Administration Guide* for further details.

---

**4 Click Save.**

If adding a new customer, the status of the person you added has a default value of Proposed. Your People/Contact administrator must verify those in proposed status, update them to Enabled, and add any other information that is necessary.

## First call resolution

Before you assign an incident request, determine if you can resolve the incident yourself. To do this, use the BMC Remedy Incident Management's Incident Matching feature, or the BMC Remedy Knowledge Management application, if you have access to it, to look for matching, or similar, incident requests, problem investigations, known errors, and solution entries.

---

**Note**

BMC Remedy Knowledge Management is a separate application that must be integrated with BMC Remedy Incident Management before you can use it. For information about accessing BMC Remedy Knowledge Management, see [To access BMC Remedy Knowledge Management on page 89](#).

---

If you cannot resolve the incident request, assign the incident request to a specialist. For information about how to do this, see [Assigning incident requests](#), elsewhere in this guide.

---

**Note**

You can also use the Advanced Search feature to look for similar incident records. For information about how to do this, see [Searching for similar incident requests](#) elsewhere in this guide.

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## Searching for matching records

By using the record matching features, you can search for existing records that describe incidents that are similar to the one you are currently trying to resolve. This helps you ensure that you do not spend time and effort trying to resolve issues that were resolved previously.

---

**Best practice**

Whenever possible, search for matching records while you are in conversation with the customer. This ensures that you have access to customer-specific information and context, which allows you to conduct a more effective search.

---

**To search for matching records—Classic view**

- 1 Open or create an incident request.
- 2 Use one of the following methods to search for a solution:
  - Incident Matching feature. To use this method, continue with step 3.
  - BMC Remedy Knowledge Management application. When installed, this application is available from the Links area of the Navigation pane when the Incident Request form is open. For detailed information about how to open this application, see [To access BMC Remedy Knowledge Management on page 89](#).
- 3 In the Navigation pane, choose **Functions => Incident Matching**
- 4 Select the appropriate check boxes to search for incidents, problem investigations, known errors, or solution database entries.
- 5 Run the search by using either the incident request operational categorization or the product categorization.
  - *Operational Categorization* – In the Search By Operational Categorization area, click **Current Operation**.
  - *Product Categorization* – in the Search By Product Categorization area, click **Current Product**.

---

**Note**

To further filter the search results, you can specify other fields in the search criteria pages.

---

- 6 Click **Search**.

Matching incidents, problem investigations, known errors, and solutions appear in the tabs at the bottom half of the dialog box.

- 7 To view details of a matching record, perform the following steps:
  - a On the bottom of the form, click a tab, such as the Known Errors tab.

This tab lists the matching records according to the tab you clicked.

- b Select the appropriate record.
  - c On the top half of the form, click the appropriate Search and Solution tab, such as the Known Error Search and Solution tab.
  - d Within that tab click the solution tab, such as the View Known Error Solution tab.
- 8 If the matching record resolves the current incident, from the Relationship Type list, select Resolved by.
  - 9 To relate the record and copy the solution to the resolution of the incident, click **Relate with Solution**.
  - 10 Alternatively, to relate the record without the solution, click **Relate Without Solution**.

### To search for matching records—Best Practice view

- 1 Open or create an incident request.
- 2 Use one of the following methods to search for a solution:
  - Incident Matching feature. To use this method, continue with step 3.
  - BMC Remedy Knowledge Management application. When installed, this application is available from the Links area of the Navigation pane when the Incident Request form is open. For detailed information about how to open this application, see [To access BMC Remedy Knowledge Management on page 89](#).
- 3 In the Navigation pane, choose **Quick Actions => Incident Matching**
- 4 In the Search field of the dialog box that opens, type a search string. For example, if you are looking for an incident request about a printer that regularly goes off-line, you might type **printer off line**.

The search scans multiple fields in each record looking for a match, and returns a list of records that contain the phrase "printer off line" in one of the scanned fields.

---

#### *Tip*

Try to supply as much information as possible in each search to reduce the overall number of records returned by the search. If, after using a more specific search string, the search returns too many records, consider using the advanced search. To do this, click Use Advanced Search, which opens the Incident Matching form in search mode. This search behaves the same way as the search described in To search for matching records—Classic view, above.

---

- 5 To view details of a matching record, perform the following steps:
  - a In the search results list at the bottom of the search form, select a record.
  - b Click View.
- 6 If the matching record resolves the current incident, from the Relationship Type list, select Resolved by.
- 7 To relate the record in the search results list and to copy its solution to the resolution of the incident, click **Relate with Solution**.
- 8 Alternatively, to relate the record without the solution, click **Relate Without Solution**.

## Searching for similar incident requests

Another tool that you can use for finding similar incident request records is the Advanced Search feature, which is available when an incident request record is open.

### To search for similar incident requests

- 1 With the incident request record open, from the Navigation pane, chose **Advanced Functions => Advanced Search**.
- 2 In the Advanced Search Selection dialog box, select the type of search you want to perform, then click **Select**.
  - **Search incident request by Work Info** – Searches for incident request using fields from the Work Details tab (Work Info when using the Classic view) tab.
  - **Search incident request by Relationships** – Searches for incident requests using fields from the Relationship form.
  - **Search Incidents by Assignment Logs** – Searches for Incidents using fields from the Assignment Log form.
- 3 On the search form, provide as much information as possible, and then click **Search**.
- 4 View the incident requests that match the search criteria in the table that appears.



**Tip**

You can use the advanced search bar to define a more complex set of criteria than you can specify by using only fields in a form. For example, you can search for all incident requests with two different values in the same field. Thus, you can search for all incident requests that have a status of Resolved or Closed. For more information about using the advanced search bar, see the BMC Remedy User Client online help system. To access the help system, from the BMC Remedy User Client tool bar, select **Help => Contents and Index**.

## Accessing BMC Remedy Knowledge Management

If you have access to BMC Remedy Knowledge Management, you can also use this to help you resolve the incident request on your own. This procedure describes how to access BMC Remedy Knowledge Management.

### To access BMC Remedy Knowledge Management

- 1 If you have access to BMC Remedy Knowledge Management, you can use that application to look for a solution, as described in the following table.

When using the Best Practice view	When using the Classic view
With the incident request record open, from the Links area of the Navigation pane, click <b>Search Knowledge Base</b> . For information about using BMC Remedy Knowledge Management, see the <i>BMC Remedy Knowledge Management User Guide</i> .	With the incident request record open, from the Quick Links area of the Navigation pane, click <b>Search Knowledge Base</b> . For information about using BMC Remedy Knowledge Management, see the <i>BMC Remedy Knowledge Management User Guide</i> .

## Creating a knowledge base article from an incident

If you have access to BMC Remedy Knowledge Management, you can also create knowledge base articles that described the resolution. These can be helpful to others who are trying to resolve similar incident requests.

### *Best practice*

"Search early and search often!" This Knowledge Centered Support (KCS) maxim means that before you create a knowledge base article, you should search the knowledge base to determine if there are already articles on the issue. It also means that you should conduct multiple searches using different criteria. This increases the likelihood that you will find a match. For complete information about searching for knowledge base articles, see the *BMC Remedy Knowledge Management User Guide*.

Creating a knowledge base article when you create the incident request ensures a tighter integration between incident management and the knowledge base, which is important for good knowledge management.

When you create the knowledge base article, it is important to capture the full context of the incident. This includes capturing technical information, such as hardware and software details, and non-technical information, such as what the customer *thinks* could be causing the incident and what impact the incident is having on them.

BMC recommends that you use the following information categories when capturing technical information.

- Incident – The situation (or question) in the customer's words; what are they trying to do or what is not working.  
It is important to capture the issue in the customer's words, because this is likely that the way that other customers view it the same of similar issues. If the customer's description is reworded or recategorized by technical staff subsequent to the incident request being recorded, it might not be found as a match when searching knowledge base articles the next time a similar issue arises.
- Environment – What technology does the customer have? Was anything in the environment changed recently?
- Resolution – The steps required to resolve the incident or answer the question.
- Metadata – High level categorization of the article's content aids searchability, maintenance, reporting, and other processes related to the handling of the article.

Over time, the way that a person who reports an incident remembers and interprets non-technical information can change. It is important, therefore, to capture non-technical information in a knowledge base article early in the incident handling process. For this reason, BMC also recommends that you create the knowledge base article and register the incident request simultaneously. Even if the incident resolution is not yet known, you can start the knowledge base article and then add resolution information later. This ensures that known details are captured and are available to others who might be working on the same or a similar incident request. By always creating incident requests and knowledge base articles simultaneously, you also ensure that knowledge articles become an integral byproduct of incident registration.

**Note**

For complete information about creating knowledge base articles, see the *BMC Remedy Knowledge Management User Guide*.

**To create a knowledge base article**

- 1 Open the resolved incident request record.
- 2 Create the knowledge base article.

When using the Best Practice view	When using the Classic view
From the Links area of the Navigation pane, click <b>Create Knowledge</b> .	From the Quick Links area of the Navigation pane, click <b>Create Knowledge</b> .

**Creating a solution database entry from an incident**

If you have access to BMC Remedy Problem Management, you can publish the resolution from an incident into the solution database.

### ***Best practice***

"Search early and search often!" This Knowledge Centered Support (KCS) maxim means that before you create a knowledge base article, you should search the knowledge base to determine if there are already articles on the issue. It also means that you should conduct multiple searches using different criteria. This increases the likelihood that you will find a match. For complete information about searching for knowledge base articles, see the *BMC Remedy Knowledge Management User Guide*.

Creating a knowledge base article when you create the incident request ensures a tighter integration between incident management and the knowledge base, which is important for good knowledge management.

When you create the knowledge base article, it is important to capture the full context of the incident. This includes capturing technical information, such as hardware and software details, and non-technical information, such as what the customer *thinks* could be causing the incident and what impact the incident is having on them.

BMC recommends that you use the following information categories when capturing technical information.

- **Incident** – The situation (or question) in the customer's words; what are they trying to do or what is not working.  
It is important to capture the issue in the customer's words, because this is likely that the way that other customers view it the same of similar issues. If the customer's description is reworded or recategorized by technical staff subsequent to the incident request being recorded, it might not be found as a match when searching knowledge base articles the next time a similar issue arises.
- **Environment** – What technology does the customer have? Was anything in the environment changed recently?
- **Resolution** – The steps required to resolve the incident or answer the question.
- **Metadata** – High level categorization of the article's content aids searchability, maintenance, reporting, and other processes related to the handling of the article.

Over time, the way that a person who reports an incident remembers and interprets non-technical information can change. It is important, therefore, to capture non-technical information in a knowledge base article early in the incident handling process. For this reason, BMC also recommends that you create the knowledge base article and register the incident request simultaneously. Even if the incident resolution is not yet known, you can start the knowledge base article and then add resolution information later. This ensures that known details are captured and are available to others who might be working on the same or a similar incident request. By always creating incident requests and knowledge base articles simultaneously, you also ensure that knowledge articles become an integral byproduct of incident registration.

### To create a solution entry from an incident

- 1 Open the incident record.
- 2 Click the **Relationships** tab.
- 3 From the Request Type list, select **Solution Database**.
- 4 Click **Create**.
- 5 Edit the form as required.
- 6 Click **Save**.

## Relating incident requests as duplicates

You can relate an incident request to another as a duplicate. The original incident request resolves all its duplicates. When someone resolves, closes, or cancels the original incident request, its Operational and Product Categorizations, Resolution, and CI fields are copied to the related duplicates, marking them with a status of Resolved. Also, if the original incident request record has a value in the Service field that is also a valid service for the customer who submitted the duplicate record, and the duplicate record's Service field is empty, the program copies the service from the original incident request record to the duplicate.

### To relate an incident request as a duplicate

- 1 For information about creating relationships, see [Defining relationships on page 165](#).

Keep the following points in mind when creating the relationship.

- If the current incident is a duplicate of the original incident, from the Relationship Type list, select Duplicate of.
- If the current incident is the original incident, from the Relationship Type list, select Original of.

## Restoring a resolved incident request record to In Progress status

If the recorded resolution did not resolve the incident, you can restore the incident request record to the In Progress status. This also moves the incident back to the Resolution and Recovery stage in the incident request lifecycle.

For information about how to do this, see [Moving a resolved incident request back to In Progress on page 115](#).

## Assigning incident requests

Service desk analysts and Group Coordinators each play a role in assigning incident requests. The information in this section applies to service desk analysts.

For information about the group coordinator's role, see [Assigning incident requests as a group coordinator on page 117](#).

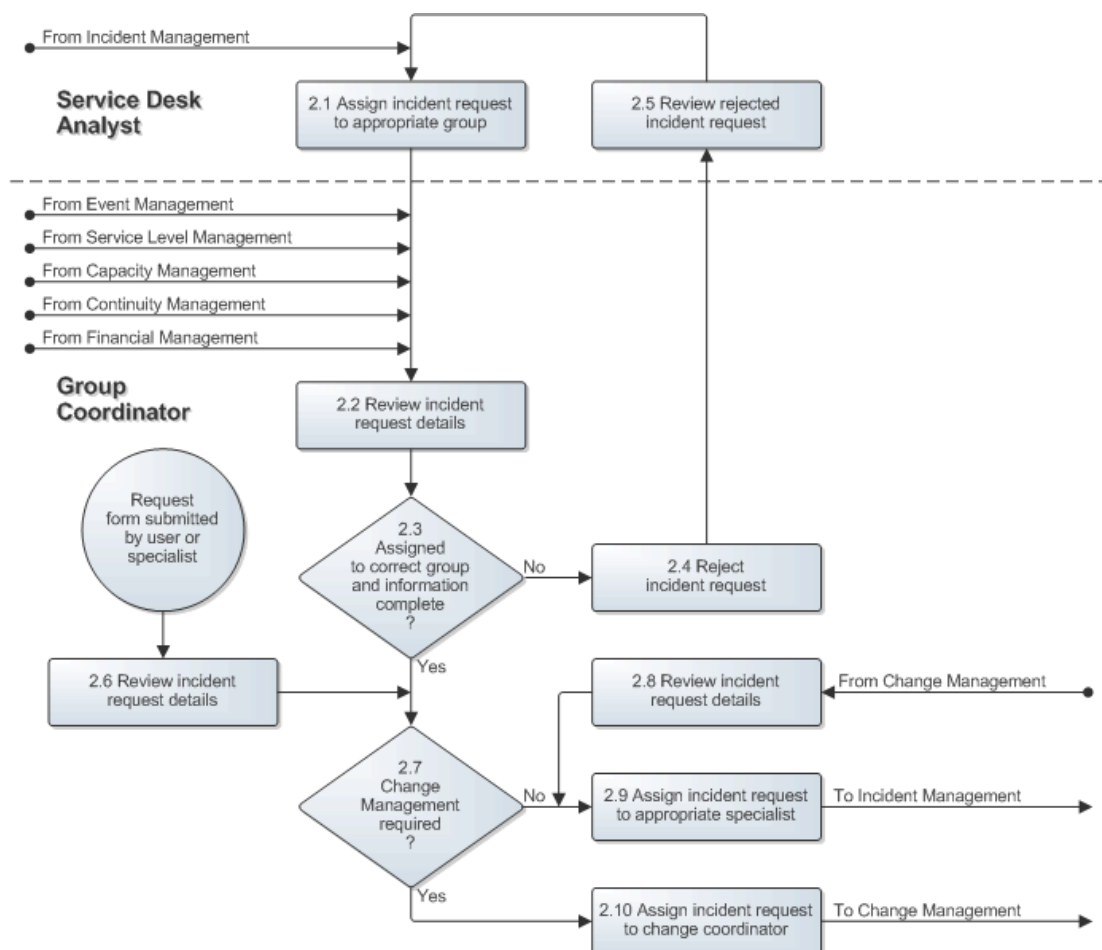
When you register a *new* incident request, one of the following actions happen:

- The routing rules used by BMC Remedy Incident Management automatically assign the incident request to the most appropriate group when the incident request record is saved.
- If the incident request is created from a template that has an assignment group predefined, the incident request is assigned to the predefined assignment group.

If you reopen a *current* incident request, you manually reassign the incident request to the most appropriate group. For information about how to do this, see [Reassigning incident requests on page 95](#). The coordinator of the group to which the incident request is assigned then reviews the request.

The following figure provides an overview of the incident request assignment process as described by the SMPM.

**Figure 11: Assigning incident requests**



## Reassigning incident requests

You can reassign an incident to either an individual or a support group.

Use the shortcut in the Quick Actions section (Quick Links in Classic view) of the Incident Request form to reassign an incident to yourself (Assign to Me) or to reassign an incident based on automatic routing (Auto Assign). This assigns the incident based on predefined mapping. Automated assignment can be based on the customer organization, location, operational categorization, or product categorization.

### To reassign an incident

- 1 Open the incident request record.

2 Reassign the investigation.

When using the Best Practice view	When using the Classic view
<ol style="list-style-type: none"><li>1 Click the <b>Work Detail</b> tab.</li><li>2 Select the Assigned Group from the list.</li><li>3 After selecting an Assigned Group, select the Assignee from the list.</li></ol>	<ol style="list-style-type: none"><li>1 Click the <b>Assignment</b> tab.</li><li>2 Select the Assigned Group from the list.</li><li>3 After selecting an Assigned Group, select the Assignee from the list.</li></ol>

3 Click **Save**.

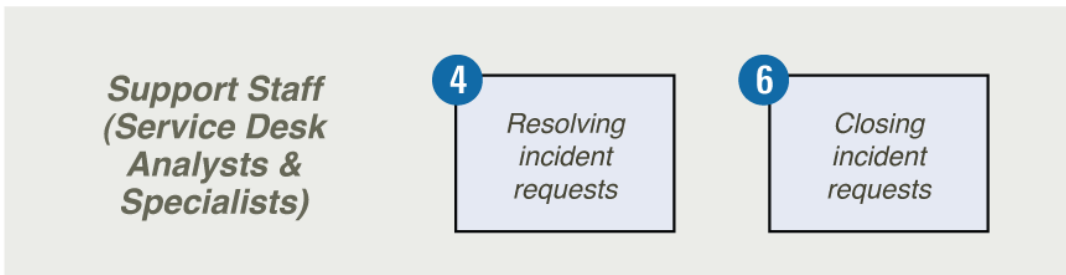


# Resolving and closing incident requests as support staff

The information in this section is for people who fulfill the role of specialist.

*Group coordinators* and *on-duty managers* should also be familiar with the information in this section to better understand the support staff tasks and so they can fulfill the role of support staff if necessary. The tasks described by this section are organized according to the stages of the incident management lifecycle as described by the BMC Service Management Process Model (SMPM). See [Process flow and the lifecycle of an incident request on page 41](#) for an illustration of the incident management lifecycle.

Figure 12: The SMPM stages covered in this section



## Resolving incident requests

You review an assigned incident request to determine whether the resolution requires a change.

If the preferred method of incident request resolution is through the change management process, you escalate the incident request by assigning it to the service owner. For information about how to do this, see [Creating a change request on page 110](#).

Perform an incident request resolution by using the change management process when the resolution requires a change that will:

- have a negative affect on the service during the service hours (defined by the SLA)
- change the functionality of a service
- require an update to the BMC Atrium Configuration Management Database (BMC Atrium CMDB)

If the incident request does not require the change management process, you resolve the incident.

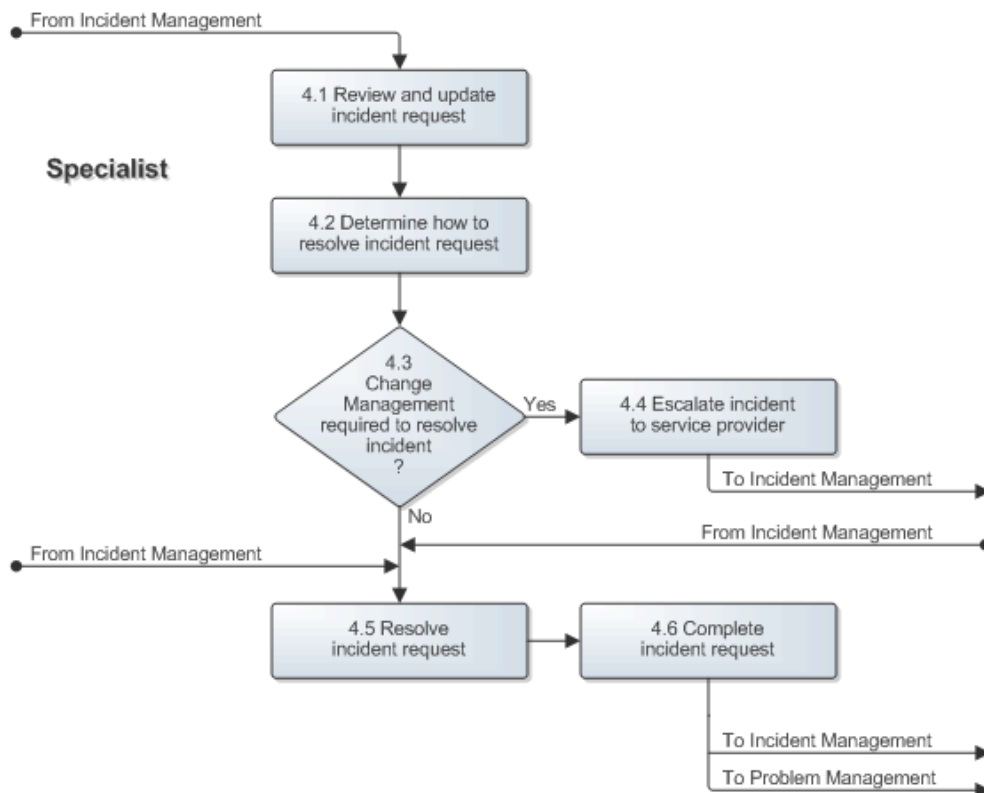
After resolving the incident request, you update the incident request, to make sure the user is notified of the resolution.

If the resolution information entered in the incident request might help users, service desk analysts, or other specialists resolve future, similar cases, you can create a solution database entry to document the solution.

If the incident request was resolved using a workaround, but the incident can recur, you notify the problem coordinator, so that a problem investigation record can be created.

The following figure provides an overview of the incident request resolution process as described by the SMPM.

**Figure 13: Incident request resolution**



## Accepting an incident request

There are several on-going tasks that you must perform when you accept and begin working on an incident request, as described by the procedures that follow. These on-going tasks help to keep the incident request record up-to-date with the latest information about the work being performed to resolve the incident. These on-going tasks include:

- [Receiving notification of assignments on page 100](#)
- [Working with assignments on page 101](#)
- [Working with tasks on page 102](#)
- [Time worked on an incident request must be recorded on page 102](#)
- [Creating work information entries on page 106](#)

- [Modifying work information entries on page 108](#)

## Receiving notification of assignments

When an incident is assigned to you, you can receive notification through:

- BMC Remedy Alert
- Email

You configure how you receive each notification from the People form, as described in the *BMC Remedy IT Service Management Administration Guide*.

All incidents assigned to you or your support groups appear in the Incident Management and Overview consoles.

The purpose of the notification policy is to inform key IT support staff and customers about incidents that have caused a service disruption. Notifications from BMC Remedy Incident Management are automated and driven by BMC Remedy Incident Management events.

Automated notifications are sent to individuals or groups, such as when an incident is created, assigned, or resolved.

Individual and system-wide preferences indicate whether to send notifications by alert, email, or pager. The administrator can configure the notification method, as to whether business hours and holidays are included or excluded, and whether to send individual or group notifications. For details about configuration, see the *BMC Remedy IT Service Management Administration Guide*.

The following scenarios are examples of notifications sent from BMC Remedy Incident Management:

- Customers are notified by email when the incident is resolved. The message includes the resolution.
- The incident owner is notified when an incident is resolved, if the assignee group is different from the owner group.
- The Problem assignment group or assignee is notified when a solution entry is created from an incident.

Assignees of incidents related to problem investigations, known errors, and change requests can receive notification from BMC Remedy Problem Management or BMC Remedy Change Management. For details, see the *BMC Remedy Service Desk: Problem Management User Guide* and *BMC Remedy Change Management User Guide*.

If you are using BMC SLM, notifications can be sent out based on milestone actions that are defined as part of service targets in the BMC SLM application. Service target escalations occur when the incident's responded date is in danger of breaching the service terms (for information about setting the responded date, see [To set the responded date on page 101](#) which follows). For example, this happens when:

- The target response time has elapsed and the incident is still assigned. .
- The target resolution time has elapsed and the incident is still open (not resolved, closed, or canceled).

You can view the Responded Date on the Date/System tab. For details about service target calculations, see [Overview of BMC SLM calculations on page 120](#).

You can configure BMC SLM to send notifications to incident assignees, assignee group coordinators, incident owners, or owner group coordinators by using templates included with the BMC Remedy Incident Management when it is integrated with BMC SLM. For details about how to configure the service targets and the notifications in BMC SLM, see the *BMC Service Level Management User Guide* .

### To set the responded date

- 1 Open the incident request

If the reported source is Email, Fax, Voicemail, Web, Self Service, BMC Impact Manager Event, or Other, the Response field appears.

- 2 Select Yes from the Response field list.
- 3 Save the change to the incident request record.

The Responded Date field on the Date/System tab is updated with the date on which you changed the Response field from No to Yes.

## Working with assignments

When you work on open incidents, you are working on incidents assigned to you or to your support group. You can also assist with an incident assigned to another support group when a task is assigned to you.

### To accept an assignment

- 1 Open the incident request record.
- 2 Assign the incident request record to yourself.

When using the Best Practice view	When using the Classic view
From the Quick Actions section of the Navigation pane, click <b>Assign to Me</b> .	From the Quick Links section of the Navigation pane, click <b>Assign to Me</b> .

- 3 Change the Status to In Progress.
- 4 Click **Save**.

## Working with tasks

You can assign tasks to one or more people without changing the assignment of the incident.

For information about working with tasks, see [Creating and monitoring tasks on page 125](#).

## Searching for a solution

You can search for information that might help resolve the current incident request in other incident requests, problem investigations, known errors, and solution database entries.

To find information that might help resolve the current incident request, use the methods for finding similar incident requests described in [First call resolution on page 85](#). If BMC Remedy Knowledge Management is installed, you can also use this application to search for possible solutions. For information about accessing BMC Remedy Knowledge Management, see [First call resolution on page 85](#). For information about how to use BMC Remedy Knowledge Management, see the *BMC Remedy Knowledge Management User Guide*.

## Time worked on an incident request must be recorded

You must keep track of the time that you spend working on an incident request.

If the incident request record is open on your desktop while you are working on it, you can use a timer to keep track of the time. Or, you can enter the time manually.

If you receive assistance from someone else, you can also keep track of their time through the Incident Assignment Log. The Incident Assignment Log contains a record of who created the current incident request as well as individual records for

each group and person who was subsequently assigned to the request. Each record contains the total effort duration for each assignee (that is, the amount of time each group or person worked on the incident request), as well as other information.

---

### Note

Because the Incident Assignment Log is historical, it does not contain a record for the current assignee, only for previous assignees. The system updates the Incident Assignment Log with a record for the most recent assignee each time the incident request is reassigned. When the incident request is moved to the Closed state, the system writes the final assignee record to the Incident Assignment Log.

---

You can also update the amount of time you spent working on an incident request after it has been assigned to another assignee.

## Recording your time

Use the following procedure to record time against an incident request that currently is assigned to you.

### To record your time

- 1 Open the incident request record.
- 2 Perform one of the following tasks.

When using the Best Practice view	When using the Classic view
<ul style="list-style-type: none"> <li>■ In the Work Detail area, click the clock graphic beside the Assignee field to open the Effort Time Spent window.</li> </ul>	<ul style="list-style-type: none"> <li>■ Click the <b>Assignment</b> tab.</li> </ul>

- 3 Enter the time you spent on the incident request in the Effort Time Spent (Minutes) field.

---

### Tip

Use the automatic timer to keep track of your time anytime you work on the incident request while the incident request record is open on your desktop. To start the timer, click the **Stopped** button (the text on the button changes to Started – the button's text reports the timer's current status). When you finish working on the incident request, make sure you click the **Started** button (the text on the button changes to Stopped).

---

- 4 Click **Save**.

**Note**

The Effort Time Spent Minutes field is a data entry field only. When you click **Save**, the time value that you provided in Effort Time Spent Minutes is written to a database field called Total Time Spent, which totals the time spent on the incident request for the current assignee. After the BMC Remedy Incident Management writes the time value to Total Time Spent, it resets Effort Time Spent Minutes to zero. If you reassign the incident request or resolve it, the cumulative time is written from Total Time Spent to the Assignment Log and Total Time Spent is reset to zero.

## Recording time for an assistant

Use the following procedure to record time against an incident request for someone who assisted you but who was not formally assigned to the incident request.

### To record an assistant's time

- 1 Open the incident request record.
- 2 Perform one of the following actions.

When using the Best Practice view	When using the Classic view
<ul style="list-style-type: none"> <li>■ In the Work Detail area, click the clock graphic beside the Assignee field to open the Effort Time Spent window.</li> </ul>	<ul style="list-style-type: none"> <li>■ Click the <b>Assignment</b> tab.</li> </ul>

- 3 Click **Update Assignment Log** to open the Incident Assignment Log dialog box.
- 4 Add the assistant to the Assignment Log by selecting values for the following fields:
  - **Support Company** – the name of the assistant's support company
  - **Support Organization** – the name of the assistant's support organization
  - **Assigned Group** – the name of the assistant's assigned group
  - **Assignee** – the name of the assistant's name of the individual.
- 5 In the Effort Time Spent (Minutes) field, enter the time the assistant spent on the incident request .
- 6 Click **Add**.



An entry containing this information appears in the table at the bottom of the Incident Assignment Log dialog box.

## Updating your time after the incident request is reassigned

Use the following procedure to update the time that you spend on an incident request after it has been reassigned. For example, if the person or group to which the incident request is reassigned asks for your help with some aspect of the incident request resolution, you can update your record in the Incident Assignment Log with the additional time.

### Note

You can update the time only for your own Incident Assignment Log records. You cannot update the records of other support groups or individuals.

### To update your time after the incident request is reassigned

- 1 Open the incident request record.
- 2 Open the Incident Assignment Log dialog box.

When using the Best Practice view	When using the Classic view
<ul style="list-style-type: none"> <li>■ In the Work Detail area, click the clock graphic beside the Assignee field to open the Effort Time Spent window.</li> </ul>	<ul style="list-style-type: none"> <li>■ Click the <b>Assignment</b> tab.</li> </ul>

- 3 Click **Update Assignment Log**.
- 4 In the table at the bottom of the Incident Assignment dialog box, select your record.
- 5 In the Effort Time Spent (Minutes) field of the Update Assignee Effort Duration area, type the number of minutes that you are adding or subtracting from your recorded time.
- 6 Click the plus button (+) to add the time to the record's total amount of time, or click the minus button (-) to subtract the time.
- 7 Click **Close**.

### Note

You cannot delete a completed assignment log.

## Creating work information entries

When you begin working on an incident request, you must make sure that you keep careful work information entries in the Work Details area of the incident request record (or in the Work Info tab when using the Classic view), explaining what you have done.

For example, you might want to add a note that a particular CI was deployed, and include the date.

You can add work information entries to an incident request record directly from the Incidents table (as described in this procedure), or you can add them to open incident request records. For information about how to do this, see [Adding work information entries to an open incident request record on page 107](#).

---

### *Note*

If you are using the Best Practice view, you can view multiple work info entries at the same time by clicking the History icon. When you click this icon, the system displays a pop-up window with the Notes field entries arranged with the most recent entry at the top (a date and time stamp is also visible with each entry).

---

### To add work information entries from the Incidents table

- 1 From the Incident Management console, select the incident request record.
- 2 At the bottom of the Incident Management console, if the Tasks table is visible, open the Incident Detail area by clicking **Show Incident Detail**.
- 3 Click **Create**.
- 4 Enter the work information details in the Incident Work Info dialog box.
- 5 To add an attachment to the record, right-click in the attachment table and select **Add** from the menu that appears.
- 6 Choose whether to lock the work log.

---

### *Note*

If you select Yes, you cannot modify the work log after you save it.

---

- 7 Choose the type of view access:
  - **Internal** – Choose this if you do not want the customer to see the work information entry.
  - **Public** – Choose this if you want the customer to see the work information entry.

- 8 Click **Save**.

---

**Note**

---

To see a report of selected work information entries, select one or more entries, and click **Report**.

---

## Adding work information entries to an open incident request record

You can also add work information entries to an open incident request record, as described in the following procedure.

### To add work information entries to an open incident request record-Classic view

- 1 With the incident request record open, click the **Work Info** tab.
- 2 Complete the fields on the tab as described in the Classic view section of [Creating work information entries on page 106](#).

### To add work information entries to an open incident request record-Best Practice view

- 1 Open the incident request record.
- 2 On the Work Details tab, click the **Create** icon.
- 3 Type the information in the **Notes** field at the bottom of the tab.

---

**Note**

---

If you want to add an attachment to the work information note, perform step 4 to step 6.

---

- 4 Click the button to the right of the **Attachment** field.

The Add Attachment dialog box opens.

- 5 Click **Browse** and then navigate to the file you want to attach.
- 6 Select the file, click **Open**, and then click **OK**.

The file name appears in the **Attachment** field.

**Note**

- To view the attachment, click the spectacles icon.
- To remove the attachment, click the eraser icon.
- By default, the Work Info Type is General Information (the Work Info Type lets you categorize the type or source of the work info entry); the Locked status is Yes (the work note cannot be edited after you save it); the View Access is Internal (your customers cannot view the entry). If you want to change these settings, click the arrow beside More Details to reveal these fields and then update them appropriately. You can also make additional attachments – to a total of 3 – in the More Details area. Clicking the arrow again hides the fields.

7 Click **Add**.

The note text appears in the Work Details table.

## Modifying work information entries

If the work information entry is not locked, you can modify any field on it. The following procedure describes how to modify the notes, add attachments, lock the entry so it cannot be modified later, and change the viewing access level.

### To modify a work information entry from the Incidents table

- 1 From the Incident Management console, select the incident request record.
- 2 At the bottom of the Incident Management console, if the Tasks table is visible, open the Incident Detail area by clicking **Show Incident Detail**.
- 3 From the list of work information entries, select the work information record that you want to update.
- 4 Click **View**.
- 5 Make the required modification as described in the following table.

**Table 15: Modifying work information entries**

Modification	Action
To update the note	Click inside the Notes field and type the changes.

Modification	Action
To add an attachment	<p>Right-click in the attachment table and select <b>Add</b> from the menu that appears, and then follow the onscreen instructions.</p> <p><b>Note:</b> Attachments to work information entries created in BMC Service Request Management are not transferred with information sent to a back-end application, such as an incident, a change request, or a work order. You can access the attachments only from the service request.</p>
To lock the entry	<p>From the Locked list, select Yes or No.</p> <p><b>Note:</b> If you select Yes, the work information entry cannot be modified after you save it.</p>
To change the view access level	<p>From the View Access list, select Internal or Public from the View Access list.</p> <ul style="list-style-type: none"> <li>■ <b>Internal</b>—Select this if you do not want the customer to see the work information entry.</li> <li>■ <b>Public</b>—Select this if you want the customer to see the work information entry.</li> </ul>

6 Click **Save**.

## Modifying work information entries from an open incident request

You can also modify a work information entry from an open incident request, according to the following procedure.

### To modify a work information entry from an open incident request—Classic view

- 1 With the incident request record open, click the **Work Info** tab.
- 2 Select the work information entry that you want to update.
- 3 Complete the fields on the tab as described in the Classic view section of [To modify a work information entry from the Incidents table on page 108](#).

### To modify a work information entry from an open incident request—Best Practice view

- 1 Open the incident request record.

- 2 On the Work Details tab, select the work information entry that you want to update.

The Notes field updates to contain the work info text and the More Details area expands to reveal the hidden fields.

- 3 Make the required changes.

---

**Note**

If you need to remove an attachment, click the Eraser icon beside the associated Attachment field.

---

- 4 Click Save.

## Updating an incident request

To update an incident request, open the incident request and then update the details as required. Click save when you finish.

## Creating a change request

If infrastructure change is required to permanently resolve the incident request, assign the incident request to a Change Coordinator.

For information about how to reassign a ticket to a Change Coordinator this, see [Reassigning incident requests on page 95](#). If you have the correct change management permissions, you can create a change request from the Incident Request form. If you are not sure about your change management permissions, ask your system administrator.

### To create change from an incident

- 1 Open the incident request record.
- 2 Create the change request from the incident request.

When using Best Practice view	When using Classic view
From the Quick Actions area, click the arrow beside Create Related Request.	From the Navigation pane, select <b>Create Other Requests =&gt; Create Change</b>
From the menu, select Infrastructure Change	

A Change Request form appears. The Product and Operational Categorization are copied from the incident to the infrastructure change. A relationship is created between the change and the incident.

- 3 Complete the Change Request form.

For information about recording change requests, see the *BMC Remedy Change Management User Guide*.

- 4 Click **Save**.

## Closing incident requests

When you resolve the incident request, move the incident request status to Resolved.

If you are in communication with the customer when you resolve the incident request, and can verify the resolution, move the request status to Closed immediately. For information about how to do this, see [Closing an incident request on page 114](#).

If you cannot verify the resolution at the time you make it, complete the incident request with the Resolved status, and set the Status Reason field to Customer Follow-up Required. For information about how to do this, see [Completing an incident request on page 112](#).

---

### *Note*

The customer must verify the resolution within a specified period of time, or BMC Remedy Incident Management automatically moves the incident request status to Closed. The length of this period is configurable. Check with your system administrator to determine how much time your organization specifies. The default setting is 15 days.

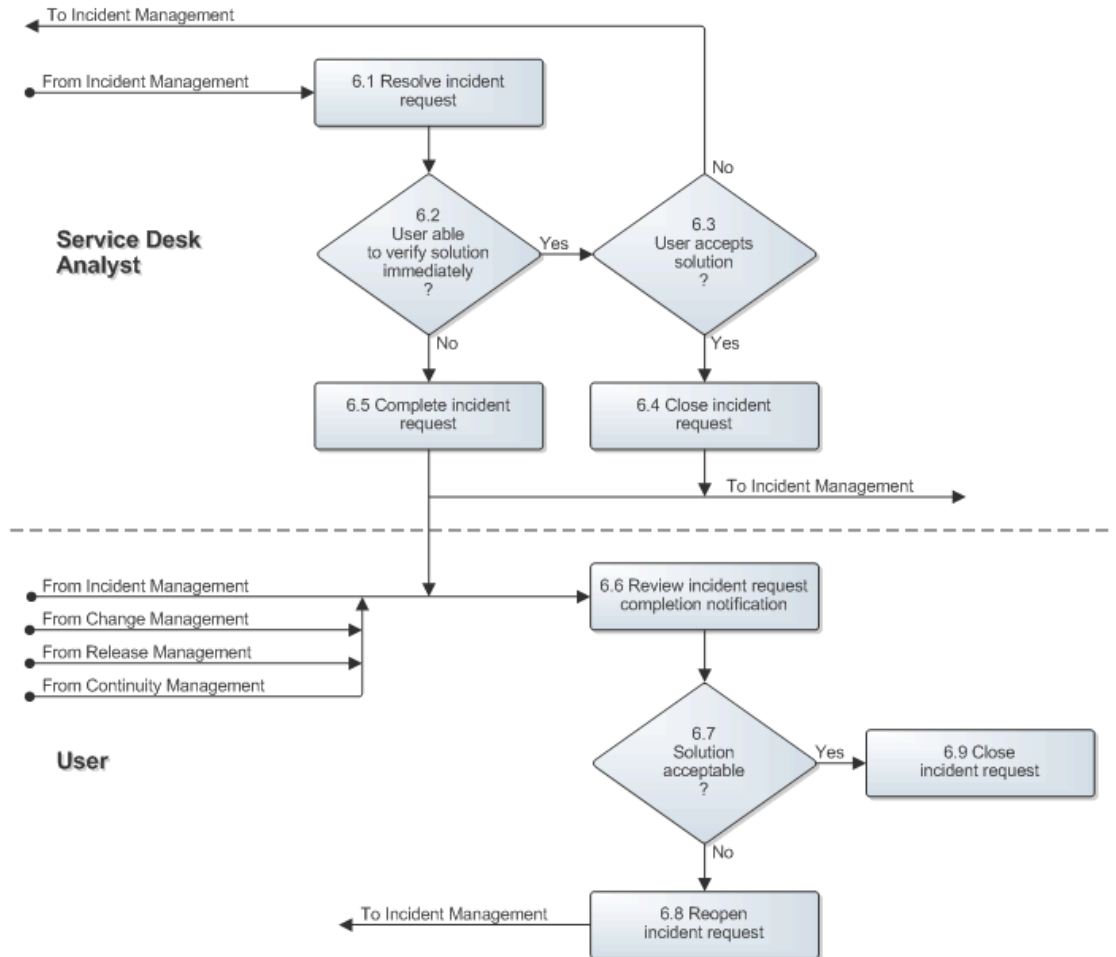
---

If the resolution information entered in the incident request can help users, service desk analysts, or other specialists resolve future, similar cases, you can create a solution database entry to document the solution. For information about how to do this, see [Creating a solution database entry from an incident on page 91](#).

If the incident request was resolved using a workaround, but the incident can recur, notify the problem coordinator so that person can investigate the issue in a timely manner and then decide whether to create a problem investigation.

If the user does not accept the resolution, the user contacts the service desk and asks for the incident request to be reopened. Depending on the incident request's status refer to one of the sections listed at the bottom of the page.

**Figure 14: Incident request closure**



## Completing an incident request

Use this procedure when you have resolved the incident request, but are unable to have the user verify the resolution.

### To complete an incident request

- 1 Open the incident request record.
- 2 Change the Status field to Resolved.
- 3 Select the appropriate status reason.



The status reason can indicate action required before the incident is closed, such as Customer Follow-up Required.

---

**Note**

If the incident type is User Service Restoration or Infrastructure Restoration, you must perform the following step. If the incident type is User Service Request or Infrastructure Event, then the following step is recommended, but not required.

---

- 4 Provide a description of what you did to resolve the incident request. You can do this using one, or both, of the following methods.

**Resolution field** – Type a description of what you did to resolve the incident request.

**Resolution Categorization fields** – Select a predefined resolution from a set of menu choices in the Incident Categorization dialog box. To open this dialog box, choose Categorization from the Links menu in the navigation pane. When the dialog box opens, select a resolution description from the Tier 1, Tier 2, and Tier 3 menus in the Resolution Categorization area.

- 5 Click **Save**.

The status of the incident is set to *Resolved*.

If CI unavailability was created from this incident and your support group is responsible for the CI unavailability, you are prompted to update the CI unavailability.

- To update the CI unavailability, for example, if the CI is now available, click **Update**. For details about CI unavailability.
- To continue resolving the incident without updating the CI, click **Close and Continue Save**.
- To return to the Incident Request form without saving, click **Close and Cancel Save**.

---

**Note**

When you resolve an incident request that has related duplicate requests, BMC Remedy Incident Management also updates those duplicate requests as resolved. It can take up to several minutes to update duplicate requests, because BMC Remedy Incident Management processes these updates in the background.

---

## Closing an incident request

This activity makes sure that the incident has successfully restored the service to the user and that the user is satisfied with the outcome. When the user agrees that the incident can be closed, review the incident request record for completion and, if appropriate, create a solution database entry.

If you leave an incident as resolved, after a period of time BMC Remedy Incident Management closes the incident. The time for your installation to close the incident is configurable, so check with your administrator to find out the interval for your organization. The default setting is 15 days.

### To close an incident request

- 1 Open the incident request record.
- 2 Review the Incident Request form to make sure that it is complete and accurate.
- 3 In the status field, choose **Closed**.
- 4 Click **Save**.

The status is now set to *Closed*. If the incident was broadcast, the broadcast is removed.

## Quickly closing an incident request

Under some circumstances, you can quickly close the incident request, without first passing it through the Resolved status.

For example, if you are on the phone with a customer and can confirm with the customer that the incident request has been resolved, you can use this procedure to close the incident request immediately.

---

### *Note*

You cannot perform this procedure if the status of the incident request is already set to Resolved.

---

### To quickly close an incident request

- 1 With the incident request open, click the down arrow in the area of the process flow bar that corresponds with the current status of the incident request, for example, Resolution and Recovery.

- 2 From the menu, select **Next Stage => Close**.

If any information is missing from the record that is required to close it, a dialog box appears asking for the information.

- 3 If prompted to, provide any missing information.
- 4 Click **Save**.

The incident request moves to the Closed status.

## Moving a resolved incident request back to In Progress

Use the following procedure to move an incident request record with a status of Resolved back to the In Progress status. You do this if the reported resolution did not resolve the incident request, and further work is needed.

### To move a resolved incident request to In Progress

- 1 Open a resolved incident.
- 2 In the Status field, select **In Progress**.
- 3 Click **Save**.

The incident moves back to the Resolution and Recovery stage, and the status changes from Resolved to In Progress.

## Reopening a closed or resolved incident request

Use the following procedure when you want to reopen a resolved or a closed incident request.

---

### *Note*

To reopen a closed incident request, you must have support group lead or support group manager permissions. People with these permissions can also modify a closed incident request if they are the support group lead or support group manager of the Incident Owner group. Someone with incident master permissions can modify any closed incident request.

---

### To reopen a closed incident

- 1 Open a closed incident.

- 2 From the Navigation pane, select **Functions => Re-open incident**.

A new Incident Request form appears with a new incident number. The basic details from the closed incident are copied to it and a relationship is created between the new and closed incident request.

---

**Note**

The Re-open option is only enabled under Functions when the status of the selected record is Closed.

---

- 3 On the new Incident Request form, click **Save**.

### **To reopen a resolved incident**

Anyone with Incident Master permissions, or anyone with Incident User permissions belonging to the Incident Assigned group or the Incident Owner group can use the Reopen Incident function to reopen a resolved incident request.

- 1 Open the resolved incident.
- 2 On the process flow bar, click the arrow on the Incident Closure stage and select Reopen from the menu.

# Working with incident requests as a manager

The information in this section is for people who fulfill the management role of group coordinator. On-duty managers should also be familiar with the information in this section.

Other people in your organization, who occasionally fulfill the role of group coordinators and on-duty managers, should also be familiar with the information in this section. Using the Incident Management console, managers can assign and track incident requests, make escalations when necessary, and approve solutions. The tasks described by this section are organized according to the stages of the incident management lifecycle as described by the BMC Service Management Process Model (SMPM). For more information about the incident management lifecycle, see [Figure 6 on page 42](#).

The following figure illustrates the SMPM stages covered in this section.

**Figure 15: The SMPM management stages covered in this section**



## Assigning incident requests as a group coordinator

This information in this section applies to group coordinators.

When an incident request is assigned to a group by the service desk analyst, you must review it before assigning it to a specialist.

If important information is missing from the incident request or if it is assigned to the wrong group, you send it back to the service desk for correction by reassigning it back to the service desk. For information about how to do this, see [Reassigning incident requests on page 95](#).

If the incident request is accepted, you check whether the request requires the change management process. If it does, you escalate (or assign) the incident request to the service owner. For information about how to do this, see [Assigning incident requests on page 94](#).

The resolution of an incident request is performed using the change management process when the resolution requires a change that will:

- have a negative affect on the service during the service hours (defined by the SLA)
- change the functionality of a service
- require an update to the BMC Atrium Configuration Management Database (BMC Atrium CMDB)

If the incident request does not require the change management process, you assign the incident to a specialist within your group.

If a change is required, you assign the incident request to the change coordinator of the affected service. For information about how to do this, see [Assigning incident requests on page 94](#).

For information about rejecting incident requests, see the following section:

## Rejecting an incident

If the incident request does not contain enough information for the specialist to work with, or if it is assigned to the wrong group, you can reject the incident request by assigning it back to the service desk.

---

### **Note**

Make sure you include a note in the Work Info section of the incident request record explaining why the incident request was rejected. Include the name of the correct group to which the incident request needs to be assigned, if known.

For information about how to do this, see [Reassigning incident requests on page 95](#).

---

# Tracking incident requests

If BMC Service Level Management (BMC SLM) is installed, you receive a notification when the incident request is in danger of breaching the service terms. For example, this happens when:

- The target response time has elapsed and the incident is still assigned.
- The target resolution time has elapsed and the incident is still open (not resolved, closed, or canceled).

---

### *Note*

You can view the Responded Date on the Date/System tab of the Incident Request form. For details about service target calculations, see [Overview of BMC SLM calculations on page 120](#).

---

You can configure BMC SLM to send notifications to incident assignees, assignee group coordinators, incident owners, or owner group coordinators, by using templates included with BMC Remedy Incident Management when you integrate it with BMC SLM. For details about configuring service targets and notifications in BMC SLM, see the *BMC Service Level Management User Guide*.

When you receive an escalation, you determine the cause of the notification and act accordingly.

For example, if the notification occurred because an SLA was breached, you escalate the incident request to the service owner of the affected service.

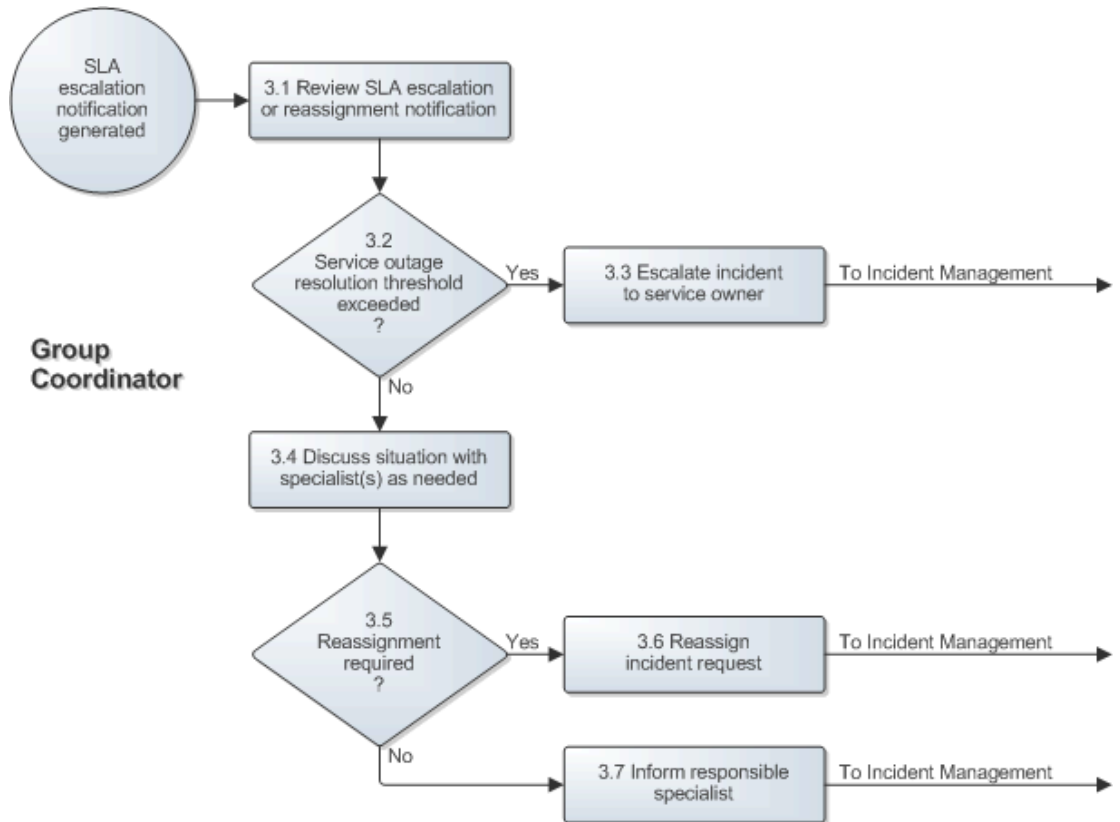
If, however, the escalation notification occurred because an SLA threshold is approaching a breach, you determine whether the incident request needs to be reassigned to another specialist with different skills, greater experience, or with different access rights.

If you decide not to reassign the incident request, then you must notify the assigned specialist that the incident request must be resolved quickly to avoid any service level objective (SLO) violations.

Beginning with BMC Remedy Service Desk: Incident Management version 7.6.00, you can place incident requests that require special monitoring on the Watch List (see [Working with the Watch List on page 121](#) for information about using this new feature).

The following figure provides an overview of the tracking incident requests process, as described by the SMPM.

**Figure 16: Tracking incident requests**



## Overview of BMC SLM calculations

From the Incident Request form, you can view incident service targets defined in BMC SLM. Service targets can be defined in BMC SLM for response time and resolution time. Service targets for an incident can be determined by related CIs, product and service categorization, and many additional criteria.

The service target response time applies when an incident request's reported source is: Email, Fax, Voicemail, Web, Self Service, BMC Impact Manager Event, or Other. In these cases, the Responded Date is blank until someone indicates that the incident has been responded to by updating the Response field on the Incident Request form to Yes (for information about updating the Response field, see [To set the responded date on page 101](#)). When support staff respond to an incident request from one of the previously noted sources, the Responded Date is set to the date that the incident was responded to.



The service target resolution time is configurable, a typical scenario would be from when the incident is recorded until it is resolved. The following scenarios can affect the calculated resolution time:

- When an incident is in a pending state, it might not be included in BMC SLM calculations, depending on the status reason.
- When a resolved incident is reopened, the BMC SLM calculations account for time spent in the resolved state.

## Working with the Watch List

The Watch List provides a separate area where you can place records that you particularly want to monitor.

### *Note*

You can use the Watch List to track an incident request record throughout its lifecycle, even if it is reassigned to a group that you do not belong to. After you add an incident request record to the Watch List, it stays there until you remove it.

The following table describes how to add and remove records from the Watch List.

**Table 16: Working with the Watch List**

Action	Note
Viewing the Watch List	From the Defined Searches list in the Navigation pane , click Watchlist.
Returning to the Incidents table	From the Defined Searches list in the Navigation pane , run one of the searches.
Adding records	From the Incidents table, select the record to add. Click Add to Watch List <b>Note:</b> When you add a record to the Watch List, it is still enabled in the Incidents table.
Removing records	From the Watch List table, select the record to remove. Click Remove From Watch List <b>Note:</b> This does not delete the record from the database; it only removes it from the Watch List.

### *Note*

When you are viewing the Watch List , the Company and View By fields at the top of the Incident Management console are disabled.

# Handling incident escalations

If an incident request is escalated to the service owner, the service owner consults with the specialists who were handling the request to understand the request's current status and what solutions have been tried already.

If the service owner determines that the best way to restore service is through the continuity site, the service owner escalates the incident request to the on-duty manager to implement the continuity site strategy (see [Reassigning incident requests on page 95](#) for information about how to do this).

If activating a continuity site is not practical, the service owner determines whether service can be restored through the change management process. If possible, the service owner creates a change request (see [Creating a change request on page 110](#) for information about how to do this).

The resolution of an incident request is performed using the change management process when the resolution requires a change that will:

- have a negative affect on the service during the service hours (defined by the SLA)
- change the functionality of a service
- require an update to the BMC Atrium CMDB

If the change management process is needed, the service owner also consults with the specialists assigned to the incident request to understand the risks that might cause the change implementation to fail, and what affect, if any, the change will have on the users. Through this consultation, they develop a strategy to minimize the affect of the change. When this is done, the service owner asks the specialist to implement the change as an emergency change.

If change management is not required, the service owner makes sure that the most appropriate specialists continue to resolve the incident within the incident management process.

---

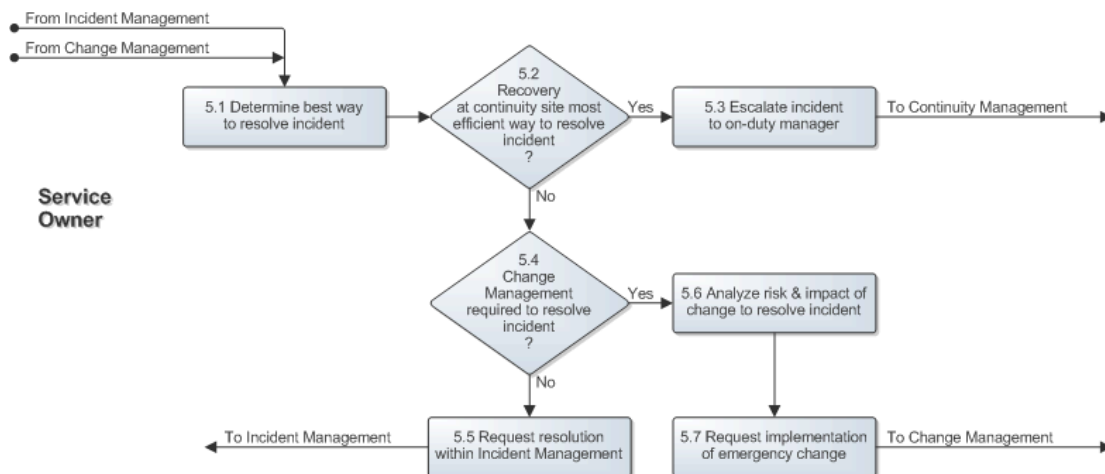
### *Note*

The role of service owner is performed by the on-duty manager when the service owner of the affected service is not available.

---

The following figure provides an overview of the escalation handling process as described by the SMPM.

**Figure 17: Escalation handling**



## Approving solutions

When the specialist proposes a solution, you must review the proposed solution to make sure the information is complete and accurate. You might need to contact the specialist for clarification or to better understand the proposed solution.

When you agree that the proposed solution is accurate and complete, and appropriate for the incident request, you approve the solution by changing the Status field on the Solution form from Inactive to Active.

If you do not agree that the proposed solution is appropriate for the incident request, you perform the following steps on the Solution form:

- record the reason for disagreement in Work Info
- set the Expiry Date field to today's date
- leave the Status field reading Inactive

### To approve or reject a solution

- 1 Open the incident request record.
- 2 Click the **Relationship** tab.

- 3 From the Relationships table, select the solution database entry you are working on, and then click **View**.
- 4 Perform the following steps, as required.

Approving a solution	Rejecting a solution
Change the Status field from Inactive to Active.	Leave the Status field at Inactive.
	On the Date/System tab, change the Expiry Date to today's date.
	Add a work information note to record the reason for disagreement.

- 5 Click **Save**.

# Creating and monitoring tasks

The information in this section is for people who fulfill one or more of the following support roles:

- service desk analysts
- group coordinators
- specialists

## Tasks overview

A task is a unit of work that needs to be completed as a step in resolving an incident request. If the solution to an incident request involves more than one action, procedure, or process, consider dividing the solution into separate tasks. Dividing the solution into separate tasks can help you to better manage and to monitor the incident request as it moves toward resolution.

You can assign the tasks to the same person, to several people, or to a support group. The person or support group to whom the task is assigned is the task implementer.”

When the group coordinator sets the task status to In Progress, the task implementers are notified of the tasks assigned to them by email, BMC Remedy Alert, pager, or some additional means. After a task is assigned to the task implementers, they can log their progress as they complete each task.

---

### *Note*

Tasks can have an Assigned status only if the associated incident request also has the status of Assigned.

---

You can use a task template to add a task to an incident request, or you can create an ad hoc task. Task templates are predefined tasks that you can quickly add to an incident request. For information about how to do this, see [Adding tasks using task templates on page 126](#). An ad hoc task is any task that is not included in the list of

task templates and, therefore, you must create it manually. For information about how to do this, see [Creating ad hoc tasks on page 127](#).

When using task templates, you can also add tasks that are divided into sub-tasks. A task that has sub-tasks is called a task group.” The sub-tasks of the task group are called children” of the task group.

Although tasks and task groups are related to specific incident request records, information about the tasks and task groups is stored on a separate Task form. You can relate an unlimited number of tasks or task groups to an incident request.

After a task or task group is assigned to a task implementer, the task implementer receives notifications to perform each of the assigned tasks.

## Opening the Task form

How you open the Task form depends on whether you are using the Best Practice view or the Classic view.

The following table describes how to open the Task form from both of the BMC Remedy Incident Management views.

**Table 17: Opening the Task form**

When using the Best Practice view	When using the Classic view
1 Open the incident request record.	1 Open the incident request record
2 From the Navigation pane, select Links > Tasks.	2 Click the Tasks tab.

## Adding tasks using task templates

To save time, you can use a task template to add a task to an incident request record. Task templates are created by your system administrator. A task template is a predefined task; usually for the most commonly performed tasks that your service desk handles. Because the Task form is predefined (that is, the fields are already completed), you do not need to spend time manually completing the form.

The following are the types of tasks that you can add to an incident request record when using templates: Task Template” and Task Group Template.” Task templates associate a single task to the incident request record. Task Template tasks can be either Manual” or Automatic.” Manual tasks must be performed by a person. Automatic tasks are preformed by a computer or automated system, but you must still assign automatic tasks to a person, so there is someone to monitor the task.

The Task Group template generates a task that has two or more sub-tasks. Task Group tasks can be defined either as *standard* or *sequencing*. Standard task group tasks can be performed in any order. In a sequencing task group, however, the tasks must be performed in the sequence indicated on the Task form.

### To add a task using task templates

- 1 Open the Tasks form, as described in [Opening the Task form on page 126](#).
- 2 From the Request Type list, select either Task Template or Task Group Template, and then click **Relate**.

---

#### Tip

To manage a large number of task templates, you can filter the list by selecting from the **Type** and **Category** lists at the top of the dialog box.

---

- 3 From the list of tasks in the Select Template dialog box, select the template for the task you are adding, and then click **Relate**.

When you click **Relate**, the Task form closes.

- 4 Repeat steps [List item. on page 127](#) and [List item. on page 127](#) for all tasks you want to add to the incident.

The templates you selected are displayed in the Tasks and Task Groups list. If there are no templates listed, click inside the list to refresh the table.

- 5 If necessary, redefine the numeric sequence of the children tasks created by any group template, as described in [Reassigning sequence numbers to task group children on page 131](#).

The task management subsystem enforces the dependencies between tasks. These relate to the sequence order specified in the Incident Request form.

- 6 Click **Close**.
- 7 When you finish adding templates, save the incident.

## Creating ad hoc tasks

Add hoc tasks are tasks that are not predefined by a task template and, therefore, must be created manually.

## To create an ad hoc task

- 1 Open the Tasks form, as described in [Opening the Task form on page 126](#).
- 2 From the Request Type list, choose **Ad hoc**.
- 3 Click **Relate**.

The Create Task form appears. Certain fields in the form are already filled in with the data for the incident.

- 4 In the upper region of the form, fill in the following required fields:
  - **Name** – Enter a descriptive name of the task.
  - **Summary** – Enter a brief description of the task.

The Type field is set to Manual by default when you create an ad hoc task.

- 5 On the General tab, fill in information about the company.

The Company field defaults to the contents of the Incident Location field in the Incident Request form. Your task can be assigned to an different department or a different company.

- 6 On the Requester tab, fill in information about the person creating the task (Requester) and the intended target of the task (Requested For).

Some information is set by default from the Requested By information of the incident.

- 7 On the Classification tab, fill in information about the product and operational categorizations.

- 8 In the Assignment/Dates tab, assign the task by completing the following fields:

- **Assignee Group** – Optionally, select a task implementer group from the list.

- **Assignee** – Optionally, select a task implementer from the list.

The BMC Remedy Assignment Engine automatically assigns the task when the task is created according to how the administrator has configured BMC Remedy Incident Management, but you can override this if necessary. For more information about assignment configuration, see the *BMC Remedy IT Service Management Administration Guide*.

- **Scheduled Start Date** – Optionally, enter an estimated start date.

- **Scheduled End Date** – Optionally, enter an estimated end date.



You can set the Start Date and End Date to be different from the dates of the parent incident.

- 9 On the Relationships tab, search for and then relate configuration items that are needed with this task.

You can perform quick actions that are with the task, for example, get related relationships.

- 10 When you finish creating the task, click **Save**.

The task information form closes and returns you to the Incident Request form. The task management subsystem enforces the dependencies between tasks. These relate to any Sequence order you might have specified in the Incident Request form.

- 11 Click **Save** on the Incident Request form.

## Accepting task assignments

You receive notification of assigned tasks by way of BMC Remedy Alert, email, and so on. You can also use the Overview console or the Incident Management console to view all tasks assigned to you. Tasks are identified by the TAS prefix. To access the Incident Management console, the task implementer must have Incident Master, Incident User, Incident Submitter, or (at minimum) Incident Viewer permissions.

### *Note*

When you follow the recommended lifecycle of an incident, the status of a task must be Scheduled before you accept the task.

## Receiving task assignment notifications by BMC Remedy Alert

You can receive notification of a task that is assigned to you by way of BMC Remedy Alert. To receive task assignment notifications using BMC Remedy Alert, use the following procedure.

### To receive notification of task assignment by BMC Remedy Alert

- 1 Log in to BMC Remedy Alert.

When you or your group receive a notification that you or your group have been assigned to a task, the information appears in BMC Remedy Alert.

- 2 To evaluate a task, select the task listed in the BMC Remedy Alert window.

3 Choose **Alerts => Details**.

The task appears in a Task form in Modify mode.

You accept a task by changing its status to Work in Progress. When an incident is set to In Progress and a task is not assigned to a person or group, the task status is set to Pending. Later, when the task is assigned, it moves automatically to the Assigned status. However, you can only change the status to Work in Progress manually.

---

**Note**

When the incident is in Assigned status, all the tasks have a status of Staged.

---

## Accepting a task assignment

After you receive notification of a task assignment, you must accept it. Use the following procedure to accept a task assignment.

### To accept an assigned task

- 1 Open the Tasks form, as described in [Opening the Task form on page 126](#).
- 2 Select the task that you want to accept.
- 3 Click **View**.

---

**Note**

To view the related incident request record, click Open next to the Request ID field on the Task form.

---

- 4 If the Status Field of the incident is set to In Progress, manually set the Status field to Work in Progress.

This is an important step, because the task then moves into Work in Progress status. In addition, different escalations occur based on the task's status. If the task is still in the Scheduled state while you are working on it, an inaccurate escalation can occur.

- 5 Click **Save**.

# Opening and viewing individual task records

You can open and view the contents of individual task records. This enables you to see detailed information about the individual records and to update them.

## To view task records

- 1 Open the Tasks form, as described in [Opening the Task form on page 126](#).
- 2 Click inside the Tasks and Task Groups table.

A list of the tasks and task group appears in the table.

- 3 In the Tasks and Task Group table, select the task record you want to view, and then click **View**.

# Reassigning task sequence numbers

When you relate tasks or task groups to an incident, they are automatically sequenced in the order in which you related them to the incident. This sequence is strictly enforced inside the incident.

You can, however, reassign the sequence in which tasks and task groups are performed. You can also assign the same sequence number to more than one task or children tasks of a task group. If two tasks or children tasks of a task group have the same sequence number, they are considered peers. You can work on peer tasks in any order.

## To reassign a sequence to task groups and tasks

- 1 Open the Tasks form, as described in [Opening the Task form on page 126](#).
- 2 In the Tasks and Task Groups table, select the task that you want to resequence.
- 3 Click either the up arrow or the down arrow located to the right of the table. This moves the selected task either higher or lower in the sequence.
- 4 Click **Close**.

# Reassigning sequence numbers to task group children

You can change the order in which the children of a group template task are sequenced.

### To reassign sequence numbers to task group children

- 1 Open the Tasks form, as described in [Opening the Task form on page 126](#).
- 2 In the Tasks and Tasks Groups table, select the task group.

The tasks assigned to the task group appear in the Children of Selected Task Group table.

---

#### **Note**

You might need to click inside the Children of Selected Task Group table to refresh its contents.

---

- 3 In the Children of Selected Task Group table, select the task you want to reassign.
- 4 Click either the up arrow or the down arrow located to the right of the table. This moves the selected task either higher or lower in the sequence.

## Assigning and reassigning tasks

After creating a task or adding a task template to an incident request record, you assign it. You can assign tasks to individuals or to a support group.

If you cannot resolve one of your assigned tasks, you can reassign the task, or you can ask your group coordinator to reassign the task. For example, you might ask the group coordinator to reassign the task in situations where you want to reassign the task to someone outside your group.

### To assign a task using the Best Practice view

- 1 Open the task record as described in [Opening and viewing individual task records on page 131](#).
- 2 Select the **Assignment** tab.
- 3 From the Assignee or Assignee Group lists, select the person or support group to work on the task as the task implementer.
- 4 Save and close the form.
- 5 The task implementer for that task is notified of the task assignment.

### To reassign a task using the Classic view

- 1 Open the task record as described in [Opening and viewing individual task records on page 131](#).
- 2 Click the **Assignment** tab.
- 3 In the Assignee or Assignee Group fields, choose the group or person to you want to reassign the task to.
- 4 Make sure the Notify Assignee field is set to Yes.
- 5 Click **Save**.
- 6 The new task implementer is notified of the request assignment. Until the new implementer accepts the task assignment, you are still assigned to the task and have responsibility for it.

## Updating task record details

After a task record is created, you can change the details that appear on the record.

To update task record details, open the task record as described in [Opening and viewing individual task records on page 131](#) and then update the details as needed. Save the changes and close the form.

## Planning task times

You can plan the time for individual tasks. The Dates tab in the Task form includes fields where you can enter scheduling information. You can create the time segments that are required to complete individual tasks.

### To plan the time for tasks

- 1 Open the task record as described in [Opening and viewing individual task records on page 131](#).
- 2 Click the **Dates** tab.
- 3 In the Dates/Time region of the form, provide dates for the Scheduled Start Date and Scheduled End Date fields.
- 4 In the Time Segment Action field, select the following options:

- Analyze Time Segments
  - Create Business Event Time Segment
  - Modify Business Event Time Segment
  - Create Categorizational Time Segment
  - Modify Categorizational Time Segment
  - Create/Modify CI Time Segment
- 5 Save and close the form.

## Tracking the time spent working on tasks

You can track the time spent working on a task at any time after it is created. Use this feature between the time the task status is in Implementation In Progress and Closed. You can track the time spent working on a task in different ways:

### Using the Start and Stop buttons

When you use this method, the time is automatically calculated based on when you click the start and stop clock buttons.

#### To use the start and the stop buttons to track the time spent working on a task

- 1 Open the task record as described in [Opening and viewing individual task records on page 131](#).
- 2 Click the Assignment tab.
- 3 Click the **Start Clock** button.

The current date and current time are displayed in the read-only Start Time field.

- 4 Click **Save**.
- 5 When you finish working on the task and want to stop tracking the time, click **Stop Clock**. You must repeat steps 1 and 2 first if you closed the task after saving it in step 4.

A message reports the number of minutes spent working on the task. The time spent is also added to the value in the read-only Total Time Spent field.

- 6 Save and close the form.

You can use the start and stop clock buttons as many times as is required. Each successive time, the new time is added to the value already in the Total Time Spent field.

## Manually entering the time

When you use this method to record your time, you can enter a time into the Time Spent field directly.

### To manually track the time spent working on a task

- 1 Open the task record as described in [Opening and viewing individual task records on page 131](#).
- 2 Click the **Assignment** tab.
- 3 Enter a number of hours or minutes manually in the editable Time Spent fields.
- 4 Click **Save**.

The time you entered is automatically added to the value already in the Total Time Hours and Minutes fields.

## Enter work into the effort log

To use this method of time tracking, you create an effort log entry as described in the following procedure.

### To use the Task Effort log to track the time spent working on a task

- 1 Open the task record as described in [Opening and viewing individual task records on page 131](#).
- 2 Click the **Assignment** tab.
- 3 Click **Effort Log**.

The Task Effort Log window appears.

- 4 Enter information into the effort log.

For example, you can enter time spent in hours and minutes and additional details.

- 5 Click **Add to Effort Log**.

An entry is added to the effort log. You can view the entry or delete it as needed.

- 6 Close the task effort log to return to the task.

- 7 Click **Save**.

## Adding work information to a task

Work information is a note about any work you performed while completing or trying to complete the task. You can add work information to each task included in the incident. The work information for each task appears in the Work Info of Selected Task table on the Task form.

### To add work information to a task

- 1 Open the task record as described in [Opening and viewing individual task records on page 131](#).

- 2 Click the **Work Info** tab.

- 3 If needed, modify the work information type.

- 4 From the Source list, select the source of this information.

Information sources can include, for example, email messages, system assignment, or the web.

- 5 Enter the details of your work information record in the Date, Summary, and Notes fields.

- 6 To add attachments to the record, right-click in the attachment table and select **Add** from the menu that appears.

- 7 From the Locked list, select **Yes** or **No** to lock the log.

- 8 Select the view access:

- **Internal**—Only users within your organization can see the entry.



- **External** – Everyone with access to the system can see the entry.
- 9 When you finish updating, save your changes.

The Save operation adds your entry to the task's work history. You filter out specific work entries in the Show field, based on the type of activity that appears in the table.
  - 10 To see a report of the activities you performed against this task, click **Report**.
  - 11 To display all current entries for work information history, click **View**.
  - 12 Close the Task form when you finish with it.
  - 13 When you return to the Incident Request form, refresh the work information entry of the Assigned Task table to display all the entries.

## Canceling tasks

You can cancel tasks by accessing them through the Incident Request form. This action does not delete the task; it sets the status of the task to Closed and the closure code to Canceled.

---

### *Note*

If you cancel an incident with open tasks, all the tasks associated with the canceled incident are also canceled. For information about canceling an incident with open tasks, see [Resolving, closing, and canceling incident requests with open tasks on page 139](#).

---

### To cancel tasks using the Best Practice view

- 1 Open the incident request record.
- 2 From the Links section of the Navigation pane, click **Tasks**.
- 3 In the Tasks and Task Groups table, select the task you want to cancel.
- 4 Click **Cancel**.
- 5 The status of the task is automatically set to Closed.
- 6 Save the incident request record.

### To cancel tasks using the Classic View

- 1 Open the incident request record.
- 2 Click the **Tasks** tab.
- 3 In the Tasks and Task Groups table, select the task you want to cancel.
- 4 Click **Cancel**.
- 5 The status of the task is automatically set to Closed.
- 6 Save the incident request record.

## Closing tasks

When you have completed a task, you are ready to close it.

---

### *Note*

Depending on how your system is configured, you might not be able to resolve the incident until you close the task.

---

### To close a task

- 1 Open the task record as described in [Opening and viewing individual task records on page 131](#).
- 2 Click the **Assignment** tab.
- 3 Update the time you spent on the task.

You can create an entry in the effort log as needed.

- 4 Click the **Work Info** tab.
- 5 Make an entry in the Work Info History field.
- 6 At the top of the Task form, set the Status field to Closed.

When a task is set to a status of Closed and certain conditions apply, you have the option of updating related CIs that might be affected by this modification.

- 7 Select a status reason to describe how the task was closed. The closure codes are:
  - Success

- Failed
  - Canceled
- 8 Click **Save**.

## Resolving, closing, and canceling incident requests with open tasks

You resolve and close incident requests with open tasks the same way that you close other types of incident requests. However, depending how your environment is configured, if you resolve or close an incident request with open tasks, you might receive either an error message or a warning message. Depending on your configuration, it is also possible to receive no message.

The following paragraphs describe what to do if you receive an error message, what happens when you receive a warning message, and when you receive no message.

For information about what happens if you cancel an incident request, see [Canceling an incident with open tasks on page 139](#) which follows.

**Error message**—If you receive an *error* message when closing an incident that has open tasks, you must close all the open tasks before you can close the incident.

When the Incident Resolution with Open Tasks rule is configured to generate an error message, the error condition stops all workflow processing and prevents the incident from being closed.

This is the default configuration.

**Warning message**—If you receive a *warning* message when closing an incident that has an open task, you can still close the incident successfully. The task remains open, however.

**No message**—It is possible to close an incident that has an open task and receive no message, depending on how your installation is configured. If you receive no message when closing an incident with an open task, the task remains open.

## Canceling an incident with open tasks

If you cancel an incident that has an open task associated with it, the open task is also canceled.



# Supplemental BMC Remedy Incident Management features

This section contains descriptions of supplemental features that you might also use if you work with the Overview console or the Incident Management console.

## Using the KPI dashboards

The KPI dashboards graph incident management business processes against the incident management key performance indicators (KPIs).

Incident management KPIs are described in [BMC Remedy Incident Management KPIs on page 142](#). If you have BMC Service Management Process Model (SMPM) installed, you can also view the incident management KPI definitions there.

---

### *Tip*

The SMPM defines a key performance indicator as, “A vital and measurable result to track the efficiency, effectiveness, and predictability of a process.”

---

The KPI dashboard component collects the data according to the selected customer company. Each KPI dashboard contains graphs that present the following types of information:

- **Relevant historical data** – Use this graph for trending purposes. The most recent historical data displayed in the graph is collected from the previous month. Historical data goes back to a maximum of one year.

---

### *Note*

Historical data only appears in a graph when that historical data exists in the database. Typically, new or recent installations, or upgrades, of BMC Remedy Incident Management might not have historical data available.

---

- **Current, or real time data** – Use this graph to see what is happening with the business process now. In most cases, the displayed real time data is collected from the first day of the current month to today's date.

You can also view the individual incident request records that are reported by the real time dashboard graph. For example, you can view all of the incident request records that are reported by the Incident Backlog KPI dashboard. For information about how to do this, see [Viewing and displaying data on page 145](#).

---

#### **Note**

KPI dashboards are available only for version 7.6.00 (and later) of the BMC Remedy ITSM applications. If you are running a mixed environment, that is, if you are running some BMC Remedy ITSM applications at version level 7.5.01 (or earlier), you see dashboards with only the version 7.6.00 (or later) applications.

---

## BMC Remedy Incident Management KPIs

The following table lists and describes the incident management key performance indicators.

**Table 18: BMC Remedy Incident Management KPIs**

KPI name	Description of graph content
Incidents Resolved	<p>This graph displays:</p> <ul style="list-style-type: none"> <li>■ The number of closed incident requests with the Service Type field set to User Service Restoration and that were resolved without escalations</li> <li>■ The total number of closed incidents</li> </ul>
Rejected Solutions	<p>This graph displays:</p> <ul style="list-style-type: none"> <li>■ The number of times that an incident request was reopened because its solution was not accepted</li> <li>■ The total number of resolved incident requests</li> </ul>
Incident Backlog	<p>This graph displays the number of incident requests that do not yet have their Status field set to Resolved, Closed, or Canceled.</p>

KPI name	Description of graph content
Service Desk Resolutions	<p>This graph displays:</p> <ul style="list-style-type: none"> <li>■ The number of incident requests that were both registered and resolved at the service desk without assistance from another group</li> <li>■ The total number of incident requests registered by service desk analysts</li> </ul>

## KPI dashboard variables

KPI dashboards use variables to fetch the data that is used to create the dashboard graphs for the selected company. In most cases, you can control what data appears in the graph.

Table 19 on page 143 lists the KPI graph types and the active variable names, and describes the information they provide. This helps you to understand the effects of hiding or displaying a specific variable.

**Table 19: KPI dashboards variables**

Graph type	Variable name	Data displayed by the variable
<b>Incidents Resolved</b>		
Historical	HPD:INC:KPI_Incident_ResolvedHistory_V1	Displays the number of escalated incident requests that were closed in the past year. This data is shown in the blue portion of the graph.
	HPD:INC:KPI_Incident_ResolvedHistory	Displays the number of non-escalated incident requests that were closed in the past year.
Real Time	HPD:INC:KPI_Incident_Resolved_Real	Displays all of the closed incidents for the User Service Restoration service type that were closed without breaching the target date. This data is shown in the blue portion of the graph.
	HPD:INC:KPI_Incident_Resolved_Real_V1	Displays all of the escalated closed incidents for the User Service Restoration service type. This data is shown in the yellow portion of the graph.
<b>Rejected Solutions</b>		

Graph type	Variable name	Data displayed by the variable
Historical	HPD:INC:KPI_Rejected_SolnHistory	Displays the number of rejected solutions for the past year. This data is shown in the blue portion of the graph.
	HPD:INC:KPI_Rejected_SolnHistory_V1	Displays the number of resolved incidents for the past year. This data is shown in the yellow portion of the graph.
Real Time	HPD:INC:KPI_Rejected_Soln	Displays the number of rejected solutions for the current reporting period. This data is shown in the blue portion of the graph.
	HPD:INC:KPI_Rejected_Soln_V1	Displays the number of resolved incidents for the current reporting period. This data is shown in the yellow portion of the graph.
<b>Incident Backlog</b>		
Historical	HPD:INC:KPI_BacklogHistory	Displays the number of incident requests that do not yet have Resolved, Closed, or Cancelled status for the past year.  <b>Note:</b> This graph uses only one variable. Hiding this variable prevents the graph from displaying any information.
Real Time	<i>You cannot select active variables for this graph.</i>	This real time graph does not use active variables. It displays the number of incident requests that do not have Resolved, Closed, or Cancelled status for the current reporting period.
<b>Service Desk Resolutions</b>		
Historical	HPD:INC:KPI_ServiceDeskHistory_v1	Displays the number of incident requests that were created by the service desk during the past year. This data is shown in the yellow portion of the graph.
	HPD:INC:KPI_ServiceDeskHistory	Displays the number of incident requests that were created and resolved by the service desk during the past year. This data is shown in the blue portion of the graph.
Real Time	HPD:INC:KPI_ServiceDesk_V1	Displays the number of incident requests that were created by the service desk during the reporting period. This data is shown in the blue portion of the graph.
	HPD:INC:KPI_ServiceDesk	Displays the number of incident requests that were created and resolved by the service desk during the reporting period. This data is shown in the yellow portion of the graph.



## Opening the KPI dashboards

Use this procedure to open the KPI dashboards.

### To open the KPI dashboards

- 1 From the Functions area of the Navigation pane, click the **KPIs** link.
- 2 From the Company list at the top, select the customer company for which you want to view KPI dashboards.

---

#### Note

Your access level determines the companies that you see in the Company list.

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- 3 From the Navigation pane, choose **ProcessKPIs => KPIashboardLink**

is the link to the specific KPI dashboard that you want to see.

---

#### Tip

Click the triangle beside the Process KPI text to open and close this area of the Navigation pane.

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## Viewing and displaying data

Controls on the open dashboard help you view and display the data. The actions that you can perform and the procedures that you use to perform them are described in The following table.

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#### Note


Not all of the KPI dashboards support all of these procedures.

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**Table 20: KPI dashboard actions and procedures**

Action	Procedure
<p><b>View specific records used to create the real time KPI dashboard data</b></p> <p>Use this procedure, for example, to view all of the incident request records that are reported by the Incident Backlog KPI dashboard. That is, you can see all of the records that do not yet have their Status field set to Resolved, Closed, or Canceled for the reporting period. <i>This function is not available on the historical data graph.</i></p>	<ol style="list-style-type: none"> <li>1 Click anywhere inside the real-time graph.</li> <li>2 In the search results list, select the record you want to view.</li> </ol>

Action	Procedure
<p><b>Zoom a graph</b></p> <p>Use the zoom feature to enlarge a section of the graph. You can also use full screen mode to enlarge the entire graph as described later in this table.</p>	<ol style="list-style-type: none"> <li>1 Click the arrow in the lower left corner of the graph to expand the bottom control panel.</li> <li>2 Click the magnifying glass icon, and then follow the onscreen instructions.</li> </ol>
<p><b>Hide or display the graph legend</b></p> <p>The default setting is to show the graph legend. The legend provides information about how to interpret the graph. <i>Not all graphs have a legend.</i></p>	<ol style="list-style-type: none"> <li>1 Click the arrow in the lower left corner of the graph to expand the bottom control panel.</li> <li>2 Deselect or select the Show Legend check box to either hide or display the legend.</li> </ol>
<p><b>Change the graph style</b></p> <p>There are many different graph styles from which you can choose. For example, you can select to display the KPI data in a line graph, a bar graph, a stacked bar graph, an area chart, and so on. However, be aware that some data is best represented in a particular format and that changing the format might affect the way in which the data is interpreted. <i>Not all graphs support all graph styles.</i></p>	<ol style="list-style-type: none"> <li>1 Click the arrow in the lower left corner of the graph to expand the bottom control panel.</li> <li>2 Click the double-arrow button, and then select the graph style you want.</li> </ol>
<p><b>Change the graph titles</b></p> <p>You can customize the title text that appears on the graphs to suit your organization's needs. For example, you can change the titles of the X and Y axis.</p>	<ol style="list-style-type: none"> <li>1 In the upper right corner of the graph, click the Open Options Panel icon. </li> <li>2 Change the label text appropriately to your organization's needs.</li> <li>3 Click Apply when you finish updating the text.</li> </ol>
<p><b>Hide or display active variables</b></p> <p>See <a href="#">KPI dashboard variables on page 143</a> and <a href="#">ROI Active variables on page 151</a> for descriptions of the active variables. <i>Not all graphs have active variables that you can turn on or off.</i>  <b>Note:</b> This procedure can also be used on ROI dashboards.</p>	<ol style="list-style-type: none"> <li>1 In the upper right corner of the graph, click the Open Options Panel icon. </li> <li>2 Select or clear the active variables that you want to display or hide.</li> </ol>

Action	Procedure
<p><b>View a graph in full screen mode</b></p> <p>You can display the selected graph across the entire screen for better visibility. <i>Not all graphs display in full screen-mode.</i></p>	<ol style="list-style-type: none"> <li data-bbox="976 279 1398 411">1 In the upper right corner of the graph, click the Full Screen icon. </li> <li data-bbox="976 457 1398 590">2 When you finish viewing the graph in full-screen mode, press ESC to restore regular display mode.</li> </ol>

## Using the Service Desk ROI dashboard

The Service Desk ROI dashboards provide a platform from which you can compare the baseline incident request call-handling and the baseline CI outage costs that were incurred prior to implementing BMC Remedy Incident Management with the actual costs realized after the installation. This information is displayed in graphs on the Cost of Incident Handling dashboard.

### Note

In some cases, if the relative difference between the numbers reported in each graph is large enough, the smaller graph might not appear on the dashboard. However, a number representing the value of the smaller graph is always visible.

The information displayed in these graphs helps you to determine the return on investment (ROI) that your organization achieves from the BMC Remedy Incident Management implementation.

Additional ROI dashboards are available on the ROI console that provide similar information for other BMC Remedy ITSM applications. For more information about those dashboards, see the *BMC Remedy Change Management User Guide*.

### Note

To view the ROI console you must have ROI Viewer or ROI Admin permissions.

The ROI data is collected by the ROI dashboard component according to:

- The customer company that you select in the ROI console
- The date range that you specify in the ROI console
- A set of parameters that are configured by someone with ROI Admin permissions.

For information about configuring the ROI dashboard parameters, see the *BMC Remedy IT Service Management Administration Guide*. For descriptions of what the configured parameters mean, see [Configured parameters on page 149](#).

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**Note**

ROI dashboards are available only for version 7.6.00 of the BMC Remedy ITSM applications and later. If you are running a mixed environment, you see only the version 7.6.00 (or later) application dashboards listed on the ROI console. For example, if you are running version 7.6.00 of BMC Remedy Change Management and version 7.5.01 of BMC Remedy Incident Management, you see only the BMC Remedy Change Management dashboards on the ROI console.

---

## To open the ROI dashboards

Use this procedure to open the ROI dashboards.

- 1 In the Navigation pane of the Overview console, click the ROI Console link.
- 2 From the Navigation pane, choose ROI Console.
- 3 From the lists at the top of the ROI console, select the following parameters:

**Company** – The client company for which you want to make the comparison.

**Start Date** – The start date of the period for which the graph is created.

**End Date** – The end date of the period for which the graph is created.

---

**Note**

Your access level controls the companies that you see in the Company list. The Effort Input, Effort Estimate, Baseline Effort, and Cost fields are configured parameters and are completed automatically by the application. For information about what the configured parameters mean, see [Configured parameters on page 149](#) which follows.

---

**Note**

Although you can enter a date range that includes a day of the month, the day of the month is ignored and only the month and the year are considered. For the purposes of the system calculations, **Start Date** is always assumed to be the first day of the selected month and year, and the **End Date** is always assumed to be the last day of the selected month and year. For example, if you enter May 21st, 2009 as the Start Date, and July 10th, 2009 as the End date, the system uses May 1st, 2009 as the start date and July 31st, 2009 as and end date.

- 4 In the ROI Navigation pane, choose Service Desk > *FlashBoardName*.

If other BMC Remedy ITSM applications are installed, you also see links to those ROI dashboards in the Navigation pane.

## Configured parameters

This section helps you understand the ROI parameters that are configured from the Application Administration console by someone with ROI Admin permissions.

The following table lists and describes the configured parameters for the Cost of Incident Handling.

**Table 21: Cost of Incident Handling parameter descriptions**

Parameter	Description
Cost	The estimated per-hour cost of incident handling used by your organization for creating projections.

Parameter	Description
<b>Effort Input</b>	<p>For Effort Input, the ROI Administrator can select from: Specify Effort Estimate, Use Baseline Effort, or Calculate Cumulative Effort.</p> <ul style="list-style-type: none"> <li>■ <b>Specify Effort Estimate</b></li> </ul> <p>Your organization selects this Effort Input value if it wants to specify an estimate that is different from the one specified in the Baseline Effort field. This parameter represents the estimated number of hours to complete an incident request.</p> <ul style="list-style-type: none"> <li>■ <b>Use Baseline Effort</b></li> </ul> <p>Your organization selects this Effort Input value if it wants the dashboard to use the same value as that specified in the Baseline Effort field to determine effort input.</p> <ul style="list-style-type: none"> <li>■ <b>Calculate Cumulative Effort</b></li> </ul> <p>Your organization selects this value if it wants the dashboard to calculate the Effort Input value by totaling the effort of all people who recorded work against any given incident request that was closed during the reporting period selected by the user.</p> <p><b>Note:</b> Calculate Cumulative Effort is used only if your organization is tracking effort in the BMC Remedy Incident Management application.</p>
<b>Effort Estimate (in hours)</b>	The actual value of the Specify Effort Estimate parameter, if that parameter is configured.
<b>Baseline Effort</b>	The estimated average number of hours required to handle an incident request, expressed in hours, used by your organization for creating projections.

The following table lists and describes the configured parameters for the Cost of Outages dashboards.

**Table 22: Cost of Outages parameter descriptions**

Parameter	Description
<b>Company</b>	The customer company to which the rest of the parameters described in this section apply. If they apply to all companies, select Global.
<b>Cost (per minute)</b>	The estimated cost of outages used by your organization for creating projections. For example, if your organization estimates that CI outages costs 95 dollars per minute, then enter 95. If your organization estimates that CI outages costs 50 euros per minute, then enter 50, and so on. The default setting for this parameter is 10.
<b>Monthly Outages (in minutes)</b>	The estimated amount of time lost to CI outages per month, expressed in minutes, used by your organization for creating projections. The default setting for this parameter is 10.

Parameter	Description
<b>Outage Input</b>	<p>For Outage Input, the ROI Administrator can select from: Calculate Cumulative Outage and Specify Estimated Outage.</p> <ul style="list-style-type: none"> <li>■ <b>Calculate Cumulative Outage</b></li> </ul> <p>Your organization selects this Outage Input value if it wants the system to use the total amount of time lost to CI outages (in minutes) for the specified date range. This is determined from examining the closed incident request records that also have related CI Unavailability records. For each CI Unavailability record, the system calculates the duration of the unavailability and then adds that amount of unavailability to the running unavailability total for the specified date range. This is the default selection for Outages Input.</p> <ul style="list-style-type: none"> <li>■ <b>Specify Estimated Outage</b></li> </ul> <p>Your organization selects this Outage Input value if it wants the system to use the number specified in the Estimated Outage (in minutes) field to calculate the actual outage cost. When you select Specify Estimated Outage (in minutes), the Estimated Outage (in minutes) field appears below the Outage Input field. For more information about the Estimated Outage (in minutes) field, see the explanation of that field, which follows. The default value is 100.</p>
<b>Estimated Outage (in minutes)</b>	The estimated amount of time, in minutes, lost to outages on a monthly basis, used by your organization for creating projections.

## Viewing and displaying data

The Cost of Incident Handling dashboard controls help you view and display the data.

The actions that you can perform and the procedures that you use to perform them are the same as those described for the KPI dashboards. See the section on KPI dashboards for more information about the actions and procedures that you can perform.

## ROI Active variables

The ROI dashboards use active variables to fetch the data that is used to create the graphs. The following tables list and describe the Cost of Incident Handling and the Cost of Outages active variable names and the meaning of the information they provide.

**Note**

The active variable used to determine the *actual* cost of incident handling and the actual cost of outages depends on which value is selected for the Effort Input parameter (for incident handling) and Outage Input parameter (for outages) by the ROI administrator. For information about the ROI Administrator-configured parameters, see [Configured parameters on page 149](#).

The following tables describe the ROI active variables.

**Table 23: Cost of Incident Handling active variables (Effort Input = Specify Effort Estimate)**

Active variable name	Meaning
ROI:Costofcallhandling_Baseline	Baseline costs
ROI:Costofcallhandling_Actual	Actual costs

**Table 24: Cost of Incident Handling active variables (Effort Input = Use Projected Effort)**

Active variable name	Meaning
ROI:Costofcallhandling_Baseline	Baseline costs
ROI:Costofcallhandling_Usingprojectedeffort	Actual costs

**Table 25: Cost of Incident Handling active variables (Effort Input = Calculate Cumulative Effort)**

Active variable name	Meaning
ROI:Costofcallhandling_Baseline	Baseline costs
ROI:Costofcallhandling_Usingcumulativeeffort	Actual costs

**Table 26: Cost of Outages - (Outage Input=Cumulative Resolution)**

Active variable name	Meaning
ROI:CIUnavailability_Baseline	Displays the projected cost. The values for the cost are selected from the configuration form.
ROI:CIUnavailability_INC	Displays the Actual cost . The values are selected from Incident form and the configurations to arrive at the Actual Cost.

**Table 27: Cost of Outages - (Outage Input=Specify Estimated Outages)**

Active variable name	Meaning
ROI:CIUnavailability_Baseline	Displays the projected cost. The values for the cost are selected from the configuration form.



Active variable name	Meaning
ROI:CIUnavailability_Estimated	Displays the Actual cost. The values are selected from configuration forms directly for calculation.

## Viewing your profile

You can view and modify your personal profile. When you click My Profile, the People (Search) form appears. In this form, you can:

- Update company information such as organization, business, and home address, and so on.
- View permissions.

For detailed information about the People form, see the *BMC Remedy IT Service Management Administration Guide*.

### To modify your profile

- 1 From the Incident Management console Navigation pane, choose **Functions => My Profile**.
- 2 On the People form, update the information at the top of the form, or click the tab corresponding to the area in which you want to change the profile information.
- 3 Make your changes by selecting from the various lists that are available.
- 4 When you finish making the changes, click **Save**.

## Creating a problem from an incident

If you fulfill the Problem Coordinator role, you can create a problem investigation from an incident request.

### To create a problem investigation from an incident request

- 1 Open the incident request record.
- 2 Create the problem investigation.

When using Best Practice view	When using Classic view
From the Quick Action area, click the arrow beside Create Related Request.	From the Navigation pane, select <b>Create Other Requests =&gt; Create Problem</b>
From the menu, select Problem Investigation	

The Problem form appears. The details are copied from the incident request to the Problem form and a relationship is created between the problem investigation and the incident request.

- 3 Complete the Problem form, as described in the *BMC Remedy Service Desk: Problem Management User Guide*.
- 4 Click **Save**.

## Selecting application preferences

You can set preferences to:

- Automatically use decision trees, if available, whenever you record a new incident.
- Set defaults for the consoles.
- Determine the action that occurs after you save an Incident Request form.
- Determine which console appears by default when you open BMC Remedy Incident Management.

### To set your preferences

- 1 From the Navigation pane of the Incident Management console, choose **Functions => Application Preferences**.
- 2 Update the Application Preferences form as appropriate.

The following table describes the BMC Remedy Incident Management settings available on the form.

**Table 28: Application preference settings**

Setting	Description
Preferences for	This is a read-only field that identifies the user.

Setting	Description
Default Home Page	Select the console that you want to appear as your home page when you log into the BMC Remedy Action Request System (BMC Remedy AR System) server. For example, if you want the Incident Management console to appear, select <b>Incident Management Console</b> .
Company	Select the company that you want to appear by default in the Company field, which is found under the More Filters feature on the application's console.
Console View	<p>The default console view, with the search criteria, controls which incident requests appear in the Assigned Work area. You can temporarily change this setting from the Navigation pane of the console. The following list shows you the available selections:</p> <ul style="list-style-type: none"> <li>■ <b>All</b> – Displays all incident requests.</li> <li>■ <b>Submitted by me</b> – Displays all incident requests that you submitted.</li> <li>■ <b>Assigned to Me</b> – Displays incident requests to you.</li> <li>■ <b>Assigned to my Selected Groups</b> – Prompts you to first select a support group to which you belong, then displays incident requests assigned to that group.</li> <li>■ <b>Assigned to All My Groups</b> – Displays incident requests assigned to all your support groups. You can choose to display all work, or work that are not yet assigned to an individual.</li> </ul>
Confirm on Submit	Choose whether to display a confirmation message when you submit a new problem investigation record.
Console Page	<p><b>On Form Open</b></p> <ul style="list-style-type: none"> <li>■ <b>Data Set Name</b> – When multiple data sets exist, such as production and training data sets, select the appropriate data set.</li> </ul>

Setting	Description
<p><b>Form</b></p>	<ul style="list-style-type: none"> <li>■ <b>After New Save</b> – This setting controls the action after you click <b>Save</b> on the Incident Request form. The following list shows the available selections: <ul style="list-style-type: none"> <li>– <b>New request after submit</b> – Closes the newly created incident request, then opens a blank incident request form in New mode, ready for you to create a new incident request.</li> <li>– <b>Modify request after submit</b> – Saves the new incident request, but leaves the record open so that you can continue to work with it and add or change information.</li> </ul> </li> <li>■ <b>Enable Auto-Decision Tree</b> – If you select <b>Yes</b> from this list and a decision tree is set up; you are prompted by the decision tree when you record a new incident. For more information about decision trees, see <a href="#">Using the decision tree on page 162</a>.</li> <li>■ <b>Tab Views</b> – You can choose whether to show the following tabs if you are using the Classic view: <ul style="list-style-type: none"> <li>– Vendor</li> <li>– Financials</li> <li>– Date System</li> </ul> </li> </ul>
<p><b>Overview console</b></p>	<p>You can chose whether to show incident requests in the Overview console. You can also chose to filter which incident requests appear on the console according to their status and, if you have BMC Service Level Management installed, by service target status.</p> <p><b>Role</b> – You can also filter the entries by Role using one of the following selections (this filter works in conjunction with the other Overview console preferences you selected above):</p> <ul style="list-style-type: none"> <li>■ <b>Assigned Group</b> – Chose this selection if you want to show only incident requests for which your support group is the assignee.</li> <li>■ <b>Owner Group</b> – Chose this selection if you want to show only incident requests for which your support group is the owner.</li> </ul>

3 Click **Save**.

## Searching for records

You can search for incident request records from the Incident Management console.

To do this, you can run a series of predefined searches, search all of the records using the Search Incident form, or create and save your own custom searches using advanced qualifications.

## Running Defined Searches

Defined Searches are a series of predefined searches that you can use to look for incident request records. For example, you can use a predefined search to locate all open incident requests with a priority of Critical.

Run this type of search from the **Filter by** menu at the top of the viewing area.

---

### *Note*

You can view the support groups you belong to by clicking the My Profile link in the Navigation pane, then opening the Support Groups tab. For more information about this link, see [Viewing your profile on page 153](#).

---

### To run a Defined Search

- 1 Ensure the Show field at the top of the viewing area points to the appropriate entry for the type of search you want to run.
- 2 From the Filter By menu, select Defined Searches.
- 3 Open the search category that corresponds to the search you want to run and then select a specific search.

For example, to see all open, unassigned incident requests, select **All Open Unassigned => All Priorities**.

- 4 Click the search name to run the search. In the preceding example, you click All Priorities.

---

### *Tip*

If the contents of the Incident table does not update after you run the search, click the **Refresh** button.

---

## Creating a custom search

You can define and save a custom search. After you save the custom search, it appears in the My Searches node of the Defined Searches list.

---

**Note**

The My Searches node only appears after a custom search is defined.

---

**To create a custom search**

- 1 At the top of the console, click the magnifying glass icon beside the **Filter by** field.
- 2 In the Search Name field, type a name for the search.
- 3 Click **Build Search Qualification** to open the Advanced Qualification Builder dialog box, and then define the search qualification.
- 4 From the Keywords or Fields selection boxes, select the keywords or record fields on which you want to search.

To insert operators (+, =, >, <, and so on), click the appropriate operator button. Do not forget to place literal values between double quotation marks.

For example, if Allen Allbrook is performing an incident request review and he needs to search for incident requests that meet the following criteria:

- Impact => 2-Significant/Large or 1-Extensive/Widespread
- Service = Payroll Service
- the Last Resolved Date >= 07/19/2008

Then his query would look like this:

```
(‘Impact’ = 2-Significant/Large” OR ‘Impact’ = ”1-Extensive/Widespread”) AND ‘Service’ = Payroll Service” AND ‘Last Resolved Date’ >= 07/19/2008”
```

---

**Note**

Date formats can vary, depending on how your system is configured. The date shown in this sample query is only an example.

---

- 5 Click **Select** to close the Advanced Qualification Builder, and then click **Save**.
- 6 Close the Manage My Searches dialog box.

The search appears in the Defined Searches list, under the My Searches node.

---

**Note**

The My Searches node appears only when a custom search is defined.

---

## Editing and deleting a custom search

After you create a custom search, you can change the search criteria or you can delete it. Use the following procedure to edit or delete a custom search.

### To edit or delete the custom search

- 1 Open the Manage My Searches dialog box as described in the preceding procedure.
- 2 From the list of searches, select the search you are modifying or deleting.
- 3 Perform one of the actions described in the following table.

To modify the search	To delete the search
<ol style="list-style-type: none"> <li>1 Edit the search as required.</li> <li>2 <b>Click Save.</b></li> <li>3 <b>Click Close.</b></li> </ol>	<ol style="list-style-type: none"> <li>1 <b>Click Delete.</b></li> <li>2 <b>Click Close.</b></li> </ol>

## Searching all records

The following procedure describes how to search all incidents. Use this type of search when you are looking for an incident that is not associated with your ID or your group's ID, or any time you search all incidents.

### To search all records

- 1 From the Incident Management console Navigation pane, choose **Functions => Search Incident.**

A form appears that you can use to perform the search.

The form is laid out in a similar way to the Incident Request form.

- 2 Use the tabs and fields to build your search condition.

To reduce the number of records found by the search, enter as much information into the form as you can.

---

**Note**

If the Customer field is configured to search on an attribute other than First Name or Last Name, you can still search using the customer's name by opening the Additional Search tab and using the First Name or Last Name fields.

---

- 3 When you finish entering your search criteria, click **Search**.

When the search finishes, the search results table lists all the records that match the search criteria.

---

**Note**

The search criteria are persistent. This means that if you run a search and then close the BMC Remedy Incident Management application, the next time that you open the application and perform this procedure, the search criteria that you entered in this step are still present in the search form. They remain until you change or delete them.

---

- 4 Scroll through the table to find the specific record you want.
- 5 When you find the record, select it to display it in Modify mode.

---

**Note**

When you open a record from the search results table, it is added to the history list, but not to the breadcrumb bar. However, any related records that you open from the record do appear in the breadcrumb bar and get added to the history list.

---

## Using Global search

If you have BMC Remedy Knowledge Management installed, you can use the Global search feature. Global search searches across multiple forms for records that match a word or phrase that you type in the search area.

### To use Global search

- 1 In the text field to the right of the breadcrumb bar, type your search string and then click **Search**.

**Figure 18: Global search**



- 2 Locate the record you want in the search results table and double-click it.



The record opens in the viewing area and the system updates the breadcrumb trail with an entry for the record you opened.

---

#### **Note**

As you drill down through the record, each record you open is also added to the breadcrumb trail.

If you want to maintain the contents of the search results table to view later, do not change the text in the Search field. If you do, when you click the **Search** icon to return to the search results table, the search feature will execute a new search based on the changed content of the Search field.

---

- 3 To return to the search results table, click the **Search** icon again.

## Working with records

This section discusses some of the common functions related to record handling.

### Printing records

You can print a copy of a record to keep for filing purposes or to share with someone who does not have access to BMC Remedy Incident Management.

Use this procedure to print a record.

#### **To print a record**

- 1 Open the incident request record.
- 2 Click **Print** at the bottom of the form to open the Business Objects Report Preview dialog box.

The Business Objects Report Preview dialog box appears, enabling you to view the record before you print it.

- 3 Click the **Print** icon on the menu bar at the top of the dialog box.
- 4 When the print confirmation dialog box appears, click the **Print** icon to send the record to your local printer.
- 5 Close the Business Objects dialog box.

## Modifying records

After you generate a record, you can modify or update the information it contains. Use the following procedure to modify a record.

### To modify a record

- 1 Open the incident request record.
- 2 Click the field, tab, or link in the Navigation pane that contains or takes you to the information you want to update.
- 3 Make the appropriate changes.
- 4 Click **Save**.

## Using the decision tree

A decision tree takes you step-by-step through a questionnaire. Based on your answers, the decision tree completes part of the form for a new incident request record. Each element in the decision tree displays a list of items. Your final selection completes part of the incident.

Decision trees are built by a manager or administrator at your company.

You can set up your preferences to use available decision trees whenever you start a new incident. For information about setting up your application preferences, see [Selecting application preferences on page 154](#).

For information about configuring decision trees, see the *BMC Remedy IT Service Management Administration Guide*.

## Using scripts

Scripts are detailed instructions that have been set up at your company to help you record important information about an incident request. You have access only to scripts that have been set up for your support group. Scripts might include a list of questions to ask the user. These questions can assist you in resolving or assigning the incident.

The following list describes the types of scripts:

- **Initiator scripts**—Select an initiator script when you record an incident after you indicate the user.
- **Assignment scripts**—Select an assignment script when you assign or reassign an incident after you indicate the assignee. The assignment scripts correspond to the group to which you are assigning the incident. For example, a networking group might have specific questions for you to ask the user when you assign the incident.

### To use an Initiator script

- 1 On the Incident Management console, click **Create**.
- 2 Record the user's information in the Customer field.
- 3 From the Navigation pane, select **Advanced Functions => Initiator Script**.

### To use an Assignment script

- 1 On the Incident Management console, open an incident request record or click **Create**.
- 2 Ensure the user's name is recorded in the Customer field.
- 3 From the Navigation pane, select **Advanced Functions => Assignment Script**.

## Recording CI unavailability

CI unavailability is the actual down-time of a CI. You can record CI unavailability due to an unexpected circumstance from the incident.

---

### *Note*

You can record CI unavailability only if BMC Remedy Asset Management is installed.

---

### To record CI unavailability

- 1 Open the incident request record.
- 2 Click the **Relationships** tab.
- 3 From the Request Type list, select **Configuration Item**, and then click **Search**.
- 4 Click inside the CIs table to refresh the contents and then select the CI record against which you want to record the unavailability.

- 5 In the Relationship Type field of the CI Relationships Search dialog box, select the relationship type.
- 6 Click **Relate with Unavailability**.  

---

*Note*

Relate with Unavailability is available only when you are searching for CIs to relate to an incident.

---
- 7 In the Unavailability Type list, select whether the unavailability is scheduled or unscheduled, and whether it is full or partial unavailability.
- 8 Select the actual start date of the unavailability.
- 9 Complete additional fields of the form, as appropriate.
- 10 Click **Save**.
- 11 Close the CI Relationship Search dialog box.

## Working with relationships

By defining and maintaining relationships among records, you can create a sophisticated overview of the connections and interdependencies among the current record and additional service issues being tracked by BMC Remedy Incident Management.

An incident can be related to any of the following record types:

- Configuration item
- Another incident
- Solution database entry
- Known error
- Problem investigation

If you have BMC Remedy Asset Management and BMC Remedy Change Management, an incident can also be related to the following record types:

- CI unavailability
- Release

- Infrastructure change

## Defining relationships

Use the following procedure to define a relationship.

### To define a relationship—Classic view

- 1 Open the incident request record.
- 2 Click the **Relationships** tab.
- 3 From the Request Type list, select the type of record you want to relate the current record to.
- 4 Click **Search**.
- 5 In the dialog box that appears, complete the search criteria tabs with the relevant information, and then click **Search**.

---

#### *Note*

The content of the dialog box depends on the type of record you chose in the Request Type list. Try to supply as much information as possible in the search dialog box to reduce the overall number of records returned by the search.

---

- 6 From the search results table that appears, select the request type with which you want to create the relationship.
- 7 From the Relationship Type list at the bottom of the search dialog box, select the type of relationship you want to create.
- 8 Create the relationship by clicking the appropriate relate button at the bottom of the dialog box.

---

#### *Note*

The specific text on the relate button depends on the type of relationship you are creating. For example, if you are creating a relationship with another incident request record, the button reads Relate. If you are creating a relationship with a known error, there are two relate buttons: Relate With Solution and Relate Without Solution, and so on.

---

- 9 Click **OK** to dismiss the dialog box.

## To define a relationship-Best Practice view

- 1 Open the incident request record.
- 2 In the Quick Actions area, click the arrow beside **Create Relationship to**.
- 3 From the menu, select the type of record to you want to relate the current record to.

---

### *Note*

If BMC Remedy Remedy Knowledge Management is installed in your environment, then continue with this procedure. Otherwise, go to [Step step 5 on page 165](#) of “To define a relationship – Classic view” on page 165 and complete that procedure.

---

- 4 In the **Search** field of the dialog box that opens, type a search string. For example, if you are creating a relationship to an incident request about a printer that regularly goes off-line, you might type **printer off line**.

The search scans multiple fields in each record looking for a match, and returns a list of records that contain the phrase "printer off line" in one of the scanned fields.

---

### *Note*

The type of search dialog box that appears depends on the type of record you chose from the menu. Try to supply as much information as possible in each type of search to reduce the overall number of records returned by the search. If, after using a more specific search string, the search returns too many records, consider using the advanced search. To do this, click Use Advanced Search, which opens a form in search mode that is relevant to the type of relationship you are making. This search behaves the same way as the search described in To define a relationship-Classic view, above.

---

- 5 From the search results table, select the specific record to which you want to create the relationship.
- 6 From the Relationship Type list at the bottom of the search dialog box, select the type of relationship you want to create.
- 7 Create the relationship by clicking the appropriate relationship type button at the bottom of the dialog box.

---

**Note**

The specific text on the relate button depends on the type of relationship you are creating. For example, if you are creating a relationship with another incident request record, the button reads Relate. If you are creating a relationship with a known error, there are two relate buttons: Relate With Solution and Relate Without Solution, and so on.

---

- 8 Click **Close** to dismiss the dialog box.

## Copying relationships

When you define a relationship between the current incident request record and another record, the other record might already have one or more records related to it. To more thoroughly document all the record relationships, you can choose to relate the other record's related records to the current incident request record.

For example: you are creating a relationship between Incident Request Record A and CI B. Unknown to you, CI B already has a relationship with Incident Request Record C. However, by using the procedure described in this section, you discover the relationship between CI B and Incident Request Record C and subsequently decide to make a relationship between Incident Request Record A and Incident Request Record C.

To view the other record's other relationships and relate them to the current incident request record, use the procedure that follows.

---

**Note**

You cannot use this procedure to copy related CIs.

---

### To copy relationships

- 1 Open the incident request record.
- 2 Click the Relationships tab.
- 3 From the Relationships table, select the record with the other relationships that you want to copy.
- 4 From the Quick Actions list on the Relationships tab, select **Get Related Relationships**, then click **Execute**.

The Copy Related Relationships dialog box appears. This dialog box contains a table of all other records related to the record you selected in [Step 3 on page 167](#).

- 5 From the table of related records, select the other record that you want to relate to the current record.

---

**Note**

To see the details of the other record, select it, then click **View**. A form appears with detailed information about the selected record. Use this feature to help you determine whether you want to relate the other record to the current record.

---

- 6 Click inside the Relationship Type field.

---

**Note**

The contents of the Relationship Type list depends on the type of record you are trying to create the relationship with.

---

- 7 Select the type of relationship you want to create, and then click **Select**.
- 8 Click **OK** to dismiss the note that confirms the relationship creation.
- 9 Close the Copy Related Relationships form.

The newly created relationship appears in the Relationships table.

## Indicating impacted areas

The Impacted Areas dialog box gives you a place to show the region, site, location, and so on, that are affected by the content of the record. Use the following procedure to indicate the impacted areas.

### To indicate an impacted area

- 1 Open the incident request record.
- 2 In the Navigation pane, choose **Advanced Functions => Impacted Areas**.
- 3 From the Impacted Areas dialog box, select items from the various lists that help describe the impacted area appropriate for the incident you are working on, for example, Company, Region, and so on.

---

**Note**

Required fields are marked with an asterisk.

---

- 4 Click **Add**.



---

**Note**

You can add as many impacted areas as necessary. You can also delete areas that you have previously chosen in this dialog box.

---

- 5 When you finish indicating the impacted areas, click **Close**.

## Modifying relationship types

After you define a relationship, you can change the relationship type and update the relationship description. Use the following procedure to modify the relationship.

### To modify a relationship

- 1 Open the incident request record.
- 2 Click the **Relationships** tab.
- 3 From the Relationships table, select the relationship you want to modify.
- 4 From the Quick Actions list, select **Modify Relationship Type**, and then click **Execute**.
- 5 Enter the new relationship details according to the onscreen instructions.
- 6 Click **Save** to save your changes.

## Performing quick actions on a relationship

You can perform many other actions on a relationship. For a list of these actions, see the tables in the following procedure.

### To perform a quick action

- 1 Open the incident request record.
- 2 Click the **Relationships** tab.
- 3 From the Relationships table, select the relationship entry for which you want to perform the action.
- 4 From the Quick Actions list, select the action you want to perform, such as **Get Impacted Areas**.

The following table lists available quick actions for any related item.

**Table 29: Effects of general relationship actions**

Relationship action	Effect
Get Related Relationships	Copies the relationships of the selected record to the current incident's relationships.
Modify Relationship Type	Prompts you to modify the relationship type, as described in <a href="#">Modifying relationship types on page 169</a> .

More quick actions are available when you select a related configuration item, as indicated in the following table.

**Table 30: Effects of relationship actions for related CIs**

Relationship action	Effect
BMC Atrium Explorer	Opens a graphical relationship viewer that shows a selected CI's relationship with other records.
Create New CI Unavailability	If Asset Management is installed, you can create CI unavailability for the selected CI.
Get CI Impact/Urgency	Copies the impact and urgency of the selected CI.
Get CI Product Categorization	Copies the product categorization from the selected CI to the classification of the current incident.
Get CI Resolution Product Cat.	Copies the product categorization from the selected CI to the resolution of the current incident.
Get Impacted Areas	If Asset Management is installed, prompts you to select impacted areas, as defined in the selected CI, into the current incident's impacted areas.

- 5 Click **Execute**.

## Removing relationships

Use the following procedure to remove a relationship.

### To remove a relationship

- 1 Open the incident request record.
- 2 Click the Relationships tab.

- 3 In the Relationships table, select the relationship you want to remove.
- 4 Click **Remove**.
- 5 Click **Yes** when BMC Remedy Incident Management prompts you to confirm the removal.

BMC Remedy Incident Management refreshes the Relationships list.

## Creating reminders

Use reminders to create notes for yourself and others. You can send the reminders by email or by BMC Remedy Alert, and can specify when they are sent. You can create generic reminders, or you can create reminders that are associated with a specific request.

For example, you can send yourself a note about a specific incident to remind yourself to check on it.

You can create and view reminders from either the Incident Management console or from within a specific incident request record. Where you create or view a reminder determines which reminders you see, as described in the following list:

- **Incident Management console**—You can view all reminders that you created.
- **Incident Request form**—You can view all reminders associated with that incident. This includes the reminders that were created by other users of BMC Remedy Incident Management.

### To create a reminder

- 1 From the Navigation pane either on the Incident Management console or with the incident request record open, choose **Functions => Reminders**.

---

#### *Note*

If you create a reminder from the Incident Management console, the reminder is general in nature. If you open a record and create a reminder, the reminder is specific to the open record.

---

- 2 Click the **Create Reminder** tab.

---

#### *Note*

If you are creating the reminder from the main console, skip the next step.

---

- 3 To remove the link between the reminder you are creating and the open record, select, then delete the contents of the Link to Request-ID field. The Request-ID and Form fields are filled in automatically by BMC Remedy Incident Management. The Request-ID field links the reminder to the open record.
- 4 From the Notify list, select either **Individual** or **Group**, depending on whether you are sending the reminder to a single person, or a support group.
- 5 In the Recipient field, type the name of the person or group to whom you want to send the reminder.

If you type a person's name and press ENTER, BMC Remedy Incident Management automatically fills in the BMC Remedy AR System Login field. If BMC Remedy Incident Management discovers multiple matches with the name that you entered, another dialog box appears, from which you can specify which of the matching names you want to receive the reminder.

- 6 In the Time field, enter the date and time that you want BMC Remedy Incident Management to send the reminder.

You can type the information directly into the field, or you can click the button next to the field and select the date and time from the calendar that appears. By default, the Time field contains the current date and the current time, plus one hour (that is, if it is 3:00 p.m., the Time field reads 4:00 p.m.).

- 7 In the Subject field, enter information about the reminder.

If you need more space to type the entry, click the **Browse** button next to the field. A larger text entry box appears.

The information in this field appears in the subject line if the reminder is sent by email.

- 8 In the Message field, type the reminder message text.

If you need more space to type the entry, click the ellipsis button next to the field. A larger text entry box appears.

- 9 Click **Save**.

- 10 Click **Close** to close the Reminders dialog box.

The reminder is sent at the time you specified.

# Broadcasting messages

This feature lets you send messages to your entire organization, selected groups within the organization, and to external customers as well. You can use this feature to send messages about work in progress, system status, planned work, and so on. You can also use this feature to view messages that were broadcast to you from other groups in your organization.

## Creating broadcast messages

To create a broadcast, you must have the functional role of Broadcast Submitter. For information about having this functional role added to your system ID, either see the *BMC Remedy IT Service Management Administration Guide* or contact your system administrator.

### To create a broadcast message

- 1 Open the New/Modify Broadcasts form.

How you do this depends on where you are when creating the broadcast message.

#### Note

When you create a broadcast message from the Incident Request form, it is related to the incident request record currently open. When you create a broadcast message from the Incident Management console, it is not related to any specific incident request record.

- **Incident Management console** – Click the **View Broadcast** link (or New Broadcast link, if there are unviewed broadcast messages) and then click **Create**.
- **Incident Request form** – Perform one of the following actions.

When using the Best Practice view	When using the Classic view
From the Navigation pane, select <b>Quick Actions =&gt; Broadcast Incident</b> .	From the Navigation pane, select <b>Functions =&gt; Broadcast Incident</b> .

- 2 Enter information in the required fields.

Table 31: Required fields

Field	Explanation
<b>Company</b>	Select the company to which this broadcast pertains. Only users with access to this company can see the broadcast. If you select Global from the Company list, the broadcast is sent to everyone.  <b>Note:</b> Of the various Location fields, only Company is mandatory. The other Location fields: Region, Site Group, Site, Organization, and Department, are informational fields that allow you to specify the physical location, and so on, to which the broadcast applies. These fields otherwise do not restrict who can see the broadcast. All people assigned to the specified company will see the broadcast.
<b>Subject</b>	A short description of what the broadcast is about.
<b>Broadcast Message</b>	The text of your message.
<b>Broadcast Type</b>	Select a broadcast type from the list.
<b>Broadcast Start Date and Broadcast End Date</b>	To start the broadcast now, click inside the Broadcast Start Date field, and press ENTER. To select a date from the calendar, click the <b>Browse</b> button next to the field, then use the calendar that appears to select the date on which the broadcast is to start and the date on which you want it to end. You can also specify times of the day using the Time feature at the bottom of the calendar.
<b>Broadcast Originated From</b>	This field is completed by the system. The contents depend on where you are creating the broadcast. If you broadcast from an incident, this is set to Incident.
<b>Broadcast Originated From ID</b>	This field is filled in by the system, but only when you create a broadcast from within a record. If you create a broadcast from the main console, the field appears dimmed.
<b>View Access</b>	Select <b>Internal</b> if you want the broadcast enabled only for members of your organization. If you also want the broadcast enabled from the Requester console, select <b>Public</b> .
<b>Notify</b>	If you want a broadcast notification automatically sent to an individual or group, select <b>Yes</b> . If you select Yes, the Manual Email I button and the Notify Support area appear. Use the Manual Email button to manually send an email about the broadcast to a person or group. When the Email System form appears, enter the recipient's email address in the Internet email field, and then click <b>Send Email Now</b> . Use the Notify Support area to indicate the group you want to notify of the broadcast. You must complete all of the fields: Support Company, Support Organization, and Support Group. The notification is sent at the time and on the date specified in the Broadcast Start Date field.
<b>Priority</b>	Select a priority level for the broadcast. The choices are Low, Medium, and High.

- 3 To add an attachment to the broadcast message, right-click inside the table and choose **Add** from the menu that appears.

The Add Attachment dialog box appears. Use this to indicate the file you want to attach. Click **Open** to attach the indicated file. You are limited to one attachment for each broadcast.

- 4 To allow members of another group to modify the message, perform the following steps:
  - a Click the **Authoring Groups** tab.
  - b Click **Manage Authoring Groups**.

The Authoring Group dialog box appears.

- c Indicate the group that you want to have authoring rights by selecting from the menus. Click **Add** when you finish.

---

**Note**

The support group that you belong to appears in the table by default.

---

You can indicate another group, or click **Close** to dismiss the dialog box.

- 5 Click **Save** to save the broadcast message and close the dialog box.

---

**Tip**

When viewing a broadcast message, you can also create new broadcast messages. For information about how to do this, see [Viewing and modifying broadcast messages on page 175](#).

---

## Viewing and modifying broadcast messages

While viewing broadcasts, you can modify the message (if you belong to an authorized authoring group), create a new broadcast message, and under some circumstances (when viewing the message from the current record) relate the broadcast message to the current record.

When viewing a broadcast from either the Incident Management console or the Incident Request form, you can create a new incident request from the broadcast. If you do this, and the broadcast was created originally from either: a problem investigation, a CI (configuration item), a CI unavailability, or another incident request, BMC Remedy Incident Management asks whether you want to relate the new incident request to the originating record.

### To view or modify a broadcast message

- 1 Open the View Broadcasts form.

How you do this depends on where you are when viewing the broadcast message.

- **Incident Management console** – Click the **View Broadcast** link (or **New Broadcast** link, if there are unviewed broadcast messages) and then click **View**.
- **Incident Request form** – Perform one of the following actions.

When using the Best Practice view	When using the Classic view
Click the <b>View Broadcast</b> link (or <b>New Broadcast</b> link, if there are unviewed broadcast messages) and then click <b>View</b> .	From the Navigation pane, select <b>Quick Links =&gt; View Broadcast</b> .

---

*Tip*

When viewing broadcast messages from the Incident Request form, you see all the broadcasts, not just ones related to the current record. If the View Broadcast table contains many messages, you can sort the contents of the table using the table column headers. To do this, right-click inside the table and then select **Sort => Column Header Name => Ascending/Descending**.

---

*Tip*

For example, in the Best Practice view, to sort the broadcasts alphabetically by broadcast title from A to Z, right-click inside the Broadcast View table and then select **Sort => Broadcast\_Type => Ascending**.

- 2 Inside the View Broadcasts table, double-click the message you want to view.
- 3 To modify the broadcast message, click **Modify**.

---

*Tip*

When viewing broadcast messages, you can create a new broadcast message by clicking **Create** and then following the steps described in [Creating broadcast messages on page 173](#).

- 4 Change the fields as necessary.
- 5 Click **Save**.

## Limiting the number of messages

If a large number of messages appear in the Broadcast table of the current record, you can reduce the number of messages that appear by opening the Broadcast Search Criteria tab and defining a set of criteria that filters out messages that do not match.



---

**Note**

This section applies only when using the Classic view.

---

**To limit the number of messages**

- 1 From the Navigation pane of an open incident request record, Select **Quick Actions (Quick Links in Classic view) => View Broadcast**.
- 2 On the View Broadcast window, click the **Broadcast Search Criteria** tab.
- 3 Complete the fields on the search form according to your search parameters, and then click **Search**.

The search results appear in the View Broadcasts table at the top of the search form.

## Paging and sending email messages

BMC Remedy Incident Management gives you different methods of sending messages to either individuals or organizations:

- Pages
- Email

This section describes how to send both types of messages.

---

**Note**

BMC Remedy Incident Management can send notification messages to individuals, based on incident assignments and other events, as pages or emails. To send information about configuring notification as pager messages or email messages, see the *BMC Remedy IT Service Management Administration Guide*.

---

## Paging a person or on-call group

You can page individuals or the on-call member of a group about the current record using the Paging System feature.

**To page a person or an on-call group member**

- 1 Open the incident request record.

- 2 In the Navigation pane, choose **Functions => Paging System**.
- 3 Select either:
  - **Page By Person** – To page an individual.
  - **Page By On-Call Group** – To page the on-call member of a specified group.
- 4 Select the recipient.

To select the recipient

- a Complete the fields in the Search Criteria area, and then click **Search**.
- b Click the recipient's name in the search results table, and then click **Select**.

---

**Note**

If you are sending a page to a person (instead of an on-call group) and need help determining the correct person, you can see more information about the individual by selecting their name from the list, and then clicking **View**. This opens the People form, which contains detailed information about the recipient.

---

- 5 Complete the fields in the Paging Information area, as follows, and then click **Send Page Now**.

- **Pager Service Provider** – Select the recipient's pager service provider from the list.

If you are sending a page to a person, you can find this information by selecting the person's name from the search results list, and then clicking **View** (as described in step 4). When the People form appears, click the **Notifications** tab and look for the following field: Pager Service Provider.

---

**Note**

To learn more about the service provider, click the button with the globe icon beside the field to open a link that takes you to the service provider's website. This link is configured by your administrator, as described in the *BMC Remedy IT Service Management Administration Guide*.

---

- **Pager Type** – BMC Remedy Incident Management fills in this field automatically, using information already recorded about the receipt.
- **Pager Number** – BMC Remedy Incident Management automatically fills in this field with the pager's telephone number, when possible. If the pager number is recorded, you must enter the pager number manually. See the Manual Pager Number description in this list.

- **Pager Email** – If the pager has an email address, type it here. If you are sending the page to a person, this information is available on the Notifications tab, as described previously.
- **Manual Pager Number** – If the pager’s telephone number is not available automatically from the paging system, type the pager’s telephone number here.
- **Alphanumeric Pager Message** or **Numeric Pager Message** – Type your message in this field. Be aware that only one of these fields is enabled, depending on the type of pager the recipient carries.

## Sending email

You can send messages about the current record using the Email System.

You can use this function to send email to any valid email address. This might include an SMS recipient or a wireless PDA user, if you can send email to the device.

### To send an email message

- 1 Open the incident request record.
- 2 In the Navigation pane, choose **Functions => Email System**.
- 3 Indicate the recipient by selecting one of the following options:
  - **Current Contact** – If BMC Remedy Incident Management assigned a current contact to the record when you open the Email System form, the contact’s name with contact information appears in the table and is the default recipient.
  - **Current Assignee** – To select the current assignee, click **Select Current Assignee**. The current assignee’s name with contact information appears in the table.
- 4 To select another recipient, perform the following steps:
  - a Complete the fields in the People Search Criteria area.
  - b Click **Search**.
  - c When the search finishes, select the recipient’s name in the search results table.

If you need help determining the correct name in the list, you can see more information about an individual by selecting their name from the list, and then clicking **View**. This opens the People form, which contains detailed information about the recipient.

- 5 Complete the email information fields. See the list that follows for a description of the fields.
  - **Internet Email** – This displays the recipient’s email address. When you select the email recipient, as described in steps [List item. on page 179](#) and [List item. on page 179](#), the Internet email address updates from the people record.
  - **Email Subject Line** – By default, the subject line contains the incident ID number, to which you can append text or overtype.
  - **Email Message Body** – You type the message text here. By using the series of buttons to the right of the Email Message Body field, you can also automatically insert text from the record into the message text; you can insert the following values:
    - Status
    - Summary
    - Details
    - Resolution

---

**Note**

If one or more of these buttons are dimmed, it means the corresponding field in the record contains no information.

---

- **Email Attachment** – You can attach a file to the email message (BMC Remedy Incident Management limits you to one attachment). To do this, right-click inside the Email Attachment table, and then click **Add**. The Add Attachment dialog box appears. Browse to and select the file that you want to attach. Click **Open**. Details of the attached file appear in the table.
- 6 Click **Send Email Now**.

## Assigning or reassigning an incident to a vendor

If you need third-party vendor support to resolve an incident, use the vendor-related fields on the Incident form to track the assignment.

### To assign or reassign an incident to a vendor (Best Practice view)

- 1 Open the incident request record.

- 2 From the **Vendor Group** menu, select the vendor.
- 3 If the vendor's ticket number is available, type it in the **Vendor Ticket Number** field.
- 4 To send the vendor an email notification, use the Email function from the Functions area in the Navigation pane.

### To assign or reassign an incident to a vendor (Classic view)

- 1 Open the incident request record.
- 2 Click the Vendor tab.
- 3 To assign the incident to a vendor support group, select the vendor company, organization, and group.

If the person indicated in the Vendor Contact field is registered in the People form with a valid email address, BMC Remedy Incident Management sends an email notification to that person.

- 4 If you selected the vendor from the menus, you can press ENTER in either of the vendor name fields to select the vendor contact. If the vendor is not listed, you can type the vendor contact information.

If you type the vendor contact, BMC Remedy Incident Management uses the content of the Vendor Email field to send an email notification to the vendor.

- 5 Enter any other information that you are tracking, such as the vendor ticket number.
- 6 Click Save.

The Vendor Assignment Status field is set to Assigned. The Reported to Vendor Date is set to the current date and time, if you did not specify otherwise.

## Updating assignment availability

Your assignment availability status indicates whether you are available to accept work assignments. If your status is Yes, you are available. If your status is No, you are not available.

You can quickly update your status using the My Profile function.

---

**Note**

If you have management level permissions, you can also update the status of the people in the support group that you manage.

---

**To update assignment availability**

- 1 From the Navigation pane, choose **Functions => My Profile**.
- 2 From the Assignment Availability menu, choose the status you want.
- 3 Click **Save**.

## Working with reports

BMC Remedy ITSM provides a variety of predefined reports to give you quick and easy access to information about your system. Use the Report console to generate these reports. If the predefined reports return more information than you need, you can manage the scope of the report using qualifications.

This release of BMC Remedy ITSM integrates the Crystal reports from version 7.6.00 and Web reports from version 7.6.01. On the web interface, a number of reports are available in the Web format. Additional Crystal reports are available only if users have a valid Crystal license and have chosen to install them for the web at the time of installation.

---

**Note**

If you modify the prepared reports supplied Customer Support can only provide limited assistance if you should have a reporting problem. In addition, there is no guarantee that BMC Customer Support can solve problems that result from these modifications. The standard reports included with the BMC Remedy ITSM application are designed to be used without modification.

---

**WARNING**

If your database does not support the Not Equal To argument in this format: "!=" , format the content of your reports can be affected. Reports that have additional qualifications that filter out Group By fields (for example, 'Department' != "Engineering") also filter out the specified conditions and records that have Group By fields set to Unspecified or Null. Check with your system administrator to determine whether your database supports this form of the Not Equal To argument.

---

## Generating a report

Use this procedure to generate a standard report without qualifications by using the BMC Remedy web console.

For information about generating reports with qualifications, see [Using qualifications to generate a report on page 184](#) or [Using qualifications to generate a report on page 184](#).

### To generate a report by using the Remedy web console

- 1 In the navigation pane on the application console, choose **Functions => Reports**.
- 2 On the Reporting console, select one of the options under **Show**:

All Reports                      Displays all available reports

Created by me                    Displays reports that you created

- 3 Under **Category**, select *applicationName => reportCategory => reportName*.

A list of available reports is displayed. Reports are organized by category, some of which contain subcategories. The reports that you see vary according to which applications are installed.

- 4 Select the report that you want to run.
- 5 Click **Run**.

If you select a report that requires additional parameters, you are prompted to enter the required parameters. For example, if the selected report requires a date range, the date range field appears.

- 6 Enter the required parameters, and click **OK**.
- 7 If the report displayed is a web report, you can specify the following additional options:



Toggle  
Table of  
Contents

Display the table of contents for the current report



Export  
Report

Export the report to a file of the specified format

To export the report, select one of the following formats from the Export Format list:

- Excel
- PostScript
- PDF
- Word
- PowerPoint

Select the appropriate page options, and click **OK**.



Print Report Print the report to HTML or PDF format

## Using qualifications to generate a report

You can manage the scope of a report by adding qualifications to the criteria that the report engine uses to generate the report content. You can tell the report to search only certain specified fields for particular values, or you can build advanced qualifications by using field names, keywords, and operators.

This procedure describes how to generate basic qualifications by using the **Show Additional Filter** option. To generate a report by using advanced qualifications, see [Using advanced qualifications to generate a report on page 186](#).

### To use qualifications to generate a report

1 From the navigation pane in the application console, choose **Functions => Reports**.

2 On the Reporting console, select one of the options under **Show**:

All Reports                      Displays all available reports

Created by me                    Displays reports that you created

3 Under **Category**, select *applicationName => reportCategory => reportName*.



A list of available reports is displayed. Reports are organized by category, some of which contain subcategories. The reports that you see vary according to which applications are installed.

- 4 Select the **Show Additional Filter** option.

Along with a list of available fields, two sections are displayed – the simple query builder and the advanced query builder. You use the simple query builder to quickly construct a simple query. Alternatively, advanced users can use the advanced query builder to build the query by using BMC Remedy AR System query syntax.

For additional information about the BMC Remedy AR System Reporting console, see the *BMC Remedy Mid Tier Guide*.

- 5 Select a field name from the **Available Fields** list, and click **Add** next to the simple query builder.

---

**Note**

Click  to remove a qualification.

---

- 6 Click the down arrow next to the field name listed in the qualification box, and select the appropriate operator.
- 7 Enter or select a value for the field in the right column.

---

**Example**

If you want to enter the qualification **Cost Center = 001**, select the Cost Center field, click the down arrow next to the field and select =, and then enter 001 in the right column.

---

- 8 Repeat steps 5 through 7 for each field that you want to include in the report.
- 9 When you finish defining your additional qualifications, click **Run**.
- 10 If the report displayed is a web report, you can specify the following additional options:



Toggle Table of Contents

Display the table of contents



Export Report

Export the report to a file of the specified format

To export the report, select one of the following formats from the Export Format list:

- Excel
- PostScript
- PDF
- Word
- PowerPoint

Select the appropriate page options, and click **OK**.



**Print Report** Print the file to HTML or PDF format

## Using advanced qualifications to generate a report

You can manage the scope of a report by adding qualifications to the criteria that the report engine uses to generate the report content. You can tell the report to search only specified fields for particular values, or you can build advanced qualifications by using field names, keywords, and operators.

### To generate a report by using advanced qualifications

- 1 From the Navigation pane in the application console, choose **Functions => Reports**.
- 2 On the Reporting Console, select one of the options under **Show**:

All Reports                      Displays all available reports

Created by me                      Displays reports that you created

- 3 Under **Category**, select *applicationName => reportCategory => reportName*.

A list of available reports is displayed. Reports are organized by category, some of which contain subcategories. The reports that you see vary according to which applications are installed.

- 4 Select the **Show Additional Filter** option.

Along with a list of available fields, two sections are displayed – the simple query builder and the advanced query builder. You use the simple query builder to quickly construct a simple query. Alternatively, advanced users can use the

advanced query builder to build the query by using BMC Remedy AR System query syntax.

For additional information about the BMC Remedy AR System Reporting console, see the *BMC Remedy Mid Tier Guide*.

- 5 Select a field name from the **Available Fields** list, and click **Add** next to the advanced query builder. Use the BMC Remedy AR System query syntax to build your qualification.
- 6 Construct your qualification by using the various operators provided by the qualification builder.
- 7 Repeat steps 5 and 6 for each field that you want to include in the report.

---

**Note**

Select the qualification and press Delete to remove a qualification.

---

- 8 When you finish defining your advanced qualification, click **Run** to view the updated report.

## BMC Remedy Incident Management predefined reports

This section lists the predefined Web reports and Crystal Reports available for BMC Remedy Incident Management. It provides a brief description of each report and shows you where to find it.

You first select the type of report that you want to run. The report type pulls information from the appropriate BMC Remedy ITSM application form. After you select a report type, you select the individual report that you want to run.

[Table 32 on page 187](#) describes the predefined Web reports and [Table 33 on page 188](#) describes the predefined Crystal Reports included, organized by the type of report.

**Table 32: Web reports—names and descriptions**

Report name	Description
All Incidents => Incident Details (Dynamic - By Status and Assigned Groups)	

Report name	Description
All Incidents by Status and Assigned Groups	<p>Lists details of all incidents. Details include summary and work information.</p> <p>The report provides a summary of all incidents by status. You can drill down to the assigned groups for the selected incident status.</p> <p>You can also select an assigned group to see incident details. For additional details about the incident, you can select the incident record in the report to view the Incident form and take required action.</p>
<b>Open Incidents =&gt; Count By Assignee Group</b>	
Open Incident Count by Assignee Group and Assignee	Provides a count of the incident by assigned group and the each assignee for the group. Management can use this report to review the current workload.
<b>Open Incidents =&gt; Count By Product Categorization</b>	
Open Incident Count by Product Categorization	Provides a breakdown of the number of incidents for each product category (for example, under Hardware, the count for Processing Unit)
<b>Resolved Incidents =&gt; Resolved Incidents</b>	
Resolved Incident Volume by Product Categorization	Displays details of all resolved incidents based on Tier 1 product categorization

**Table 33: Crystal Reports—names and descriptions**

Report name	Description
<b>Asset =&gt; Configuration Items with Open Incidents</b>	
Configuration Items with Open Incidents	Lists CIs that have open incidents on them
<b>Incident Information =&gt; Aging</b>	
Incidents By Activity Time	Lists all open incidents and the amount of time since the reported date
<b>Incident Information =&gt; All Incidents</b>	
High Volume Incident by Company Chart	Displays a pie chart of all incidents based on the company. This report is intended for use with multi-tenancy.
High Volume Incident by Departments Chart	Displays a pie chart of all incidents based on the department
High Volume Incident Requester Chart	Displays a pie chart of all incidents based on the user
Incident Details by Date Range	Lists details of all incidents based on a specified date range. Details include Summary and work information.
Incident Volume By Product Categorization Chart	Displays a bar graph illustrating all incidents based on Tier 1 product categorization

Report name	Description
Monthly Incident Volumes	Provides a count of all incidents by month
Weekly Incident Volume Chart	Provides a count of all incidents by week
<b>Incident Information =&gt; Assignee Charts</b>	
Open Incident Volume by Assignee	Displays a bar chart of the number of open incidents for each assignee
Resolved and Closed Incident Volume by Assignee	Displays a bar chart of the number of resolved and closed incidents for each assignee
<b>Incident Information =&gt; Assignment Log Data</b>	
Group Assignment to Incidents	Displays a history of the groups assigned to each incident request
<b>Incident Information =&gt; Open Incidents</b>	
Incident Volume By Priority and Status Charts	Displays a bar graph illustrating all open incidents based on Tier 1 product categorization
My Open Incidents	Reports all open incidents that are assigned to the ID from which the report is run
Open Incidents - Current / by Date Range	Provides a list of all open, current incidents or a list of incidents based on a particular date range
<b>Incident Information =&gt; Resolved Incidents</b>	
My Resolved Incidents	Displays all resolved incidents that are assigned to the ID under which the report is run
Resolved Incident Counts by Product Categorization	Provides a count of all resolved incidents based on product categorization
Resolved Incident Volume by Company Charts	Displays a pie chart illustrating all resolved cases based on company. This report is for multi-tenancy clients.
Resolved Incident Volume By Department Charts	Displays a pie chart illustrating all resolved cases based on a department
Resolved Incident Volume By Priority and Status Charts	Displays pie charts illustrating all resolved and closed cases — one based on status, and the other based on priority of all resolved cases
Resolved Incident Volume By Product Categorization Chart	Displays a pie chart illustrating all resolved incidents based on Tier 1 product categorization
<b>Relationship Information =&gt; Change</b>	
Change Induced Incidents	Lists incidents that were caused by changes <b>Note:</b> This report is available only if BMC Remedy Change Management is installed.
<b>Incident Information =&gt; Related Configuration Items</b>	

Report name	Description
Incidents with Related Configuration Items	Returns a list of incident requests that have a related CI. Included is the type of CI, a summary of the incident request, and the reported date

# Managing configuration items

A *configuration item* (CI) is a physical, logical, or conceptual entity that is part of your IT environment and has configurable attributes.

Some CI types are virtual, while others are physical. The Service CI type is an example of a virtual CI. In this context, a service can be provided from one business or organization within a business to another. Service CIs can include customer support, employee provisioning, web farms, storage, and so on.

Other CI types are physical and include hardware and software.

You can use the information in CIs to diagnose user incident requests and to determine if a change to a CI or the IT infrastructure must be made. For example, if a user calls in with a printing problem, you can check the printer's CI to see whether the printer is down.

To record information against CIs, such as CI unavailability, or to relate an incident request to a CI, the CI must be recorded in the BMC Atrium Configuration Management Database (BMC Atrium CMDB). If you do not have BMC Remedy Asset Management, then BMC Remedy Incident Management provides limited ability to manage CIs and inventory.

---

## Note

You can manage configuration items even if your environment does not run BMC Remedy Asset Management. To manage configuration items, including creating and modifying CIs and managing inventory for bulk and non bulk CI's, you do not need a BMC Remedy Asset management license. However, if you are running BMC Remedy Asset Management, then you have access to additional functionality, as described in the *BMC Remedy Asset Management User Guide*. To make use of this additional functionality, you will need either Asset Admin or User permissions and an AR System fixed or floating license.

---

# Creating a CI

To create a CI, you must have Asset Admin permission. If you have Asset User permission and you are modifying a CI, your administrator must open the appropriate CI, and then relate your support group to the CI.

There are many different types of CIs that you can create. While the general procedure for creating each CI type is similar, only the specific fields on the CI form change depending on the CI type.

This section provides several examples of how to create CIs.

## To create a Service CI

- 1 From the Navigation pane of the console, choose **Functions => Manage CIs**.
- 2 From the CI Type list, select **Logical Entity => Business Service** and then click **Create**.
- 3 On the Business System form, type the CI name in the CI Name field.

When creating a CI name, BMC recommends that you follow a consistent naming convention. According to IT Infrastructure Library (ITIL) guidelines, identifiers should be short but meaningful. For example, "Payroll" or "Network." The name can be followed by a numeric code, such as NETWORK100.

- 4 Complete the optional fields that appear on the form in a way that is appropriate for the service you are creating.

**Table 34: Optional fields when creating a Service CI**

Field name	Description
CI ID	A customer specified identifier. You can use this to augment the CI Name.
Company	The company that owns the service.
Impact, Urgency, and Priority	Used to determine service levels when assigning support.
Supported	Indicates whether the service currently is supported.
System Role	A description of the role the service fulfills in the organization.
Additional Information	A place to record any additional information about the service.
Users Affected	The number of users who use this service.
Product Categorization	Use this file to categorize the business service through multiple tiers. This hierarchy is used to drive assignment routing.



Field name	Description
Location	The location of the support group that supports the service.
Lifecycle	The date on which the service became active.

- 5 Click **Save**.

---

**Note**

Depending on how your application is configured, after you click **Save** to create a Service CI, the Service CI form might be redisplayed in a Modify window.

---

**Note**

The People tab referred to in the following procedure does not appear on the Business Service form until you create and save the CI. The Relationships tab, Outage tab, and Impact tab also appear after you save the new CI. If the People tab does not appear after you click **Save**, then search for and open the CI record as described in [To search for CIs from the console on page 199](#), and then continue with [List item. on page 193](#).

- 6 Open the People tab and click **Add**.
- 7 From the Type list in the CI Person Type, select **People Organization** and then click **OK**.
- 8 From the Company list in the Organization Search window, select the company to which you are relating the service and then click **Search**.

---

**Note**

If you are relating the service to the entire company, then skip [List item. on page 101](#).

- 9 If you are relating the service either to an organization within the company or to a department within the organization, select the organization and, if necessary, the department from the Organization and Department lists.
  - **Organization** – If you choose Organization, the service is related to the specified organization within the specified company.
  - **Department** – If you choose Department, the service is related to the specified department within the specified organization.
- 10 From the Choose a Relationship Level list, select how much of the company will be related to this service.

For example, if you are relating the service to the entire company, then select **Company**. If you specified department in the preceding step, then select **Department**, and so on.

- 11 Click **Select**.
- 12 From the Role list in the Asset Person Role window, select **Used By** and click **OK**.
- 13 Click **OK** to dismiss the confirmation note.
- 14 Click **Save** and then click **Close**.

### To create a computer system CI

- 1 From the Navigation pane of the console, choose **Functions => Manage CIs**.
- 2 From the CI Type list of the CI Type dialog box, select **System => Computer System**.
- 3 Click **Create**.
- 4 In the CI Name field of the Computer System form, type a name for the CI.

When creating a CI name, BMC recommends that you follow a consistent naming convention. According to ITIL guidelines, identifiers should be short but meaningful, and for hardware they should not be based on supplier device names. For example, the name can include an indicator of the CI's function (such as "Workstation" or "Monitor") followed by a numeric code, such as MONITOR100.

- 5 In the CI ID field, type a unique alphanumeric value for the CI.
- 6 Select the company to which this CI belongs.
- 7 From the Primary Capability and Capability lists, select the roles this CI performs in your company's topology.
- 8 Select a status from the Status list.

The default value is Deployed. You can select one of the following options.

**Table 35: Computer system CI status options**

Status	Description
Ordered	The CI was ordered from the supplier.
Received	The CI was received in shipping.

Status	Description
Being Assembled	The CI is being assembled.
Deployed	The CI was installed.
In Repair	The CI is down for maintenance.
Down	The CI is down, but not yet in maintenance.
End of Life	The CI is no longer being deployed.
Transferred	The CI was transferred to another place.
Delete	The CI is marked for deletion. You must be a member of the APP-Management or APP-Administrator group to mark a CI for deletion.
In Inventory	The CI is in inventory but not yet deployed. When you select this status, you are prompted to select the inventory place.
On Loan	The CI is on loan to another location.
Disposed	The CI is no longer available and was disposed of.
Reserved	The CI was reserved and taken out of inventory.
Return to Vendor	The CI must be returned to the vendor as damaged or unwanted.

- 9 Specify whether the CI is supported by selecting **Yes** or **No** from the Supported list.
- 10 Select what impact or urgency this CI will have if it goes down.
- 11 In the Users Affected field, specify the number of people who use this CI or are affected if it goes down.
- 12 Complete the other fields in this area.

**Table 36: Field names and descriptions**

Field name	Description
Tag Number	The CI tag number. This is the number usually placed on the product by a member of your IT department to track the CI.
Serial Number	The CI serial number.
Part Number	The CI part number.
System Role	The role this CI plays in your company.
Status Reason	The reason this CI has the status it does.

- 13 Click the **General** tab.

- 14 Categorize your CI using the lists and fields in the Product Categorization area.
- 15 Specify the place of the CI using the lists and fields in the Location area.
- 16 Enter the dates of the CI in the lifecycle area.
- 17 Click the **Specifications** tab.
- 18 Add more information about the CI.
- 19 Click **Save**.

### To create a bulk inventory CI

**Note**

Bulk inventory items are not tracked by an separate record for each item. Instead, bulk items are tracked by quantities of an item type. For example, cables used to connect desktop computers to the network do not require individual records but rather, one record for a bulk quantity of the specific cable type.

- 1 From the Navigation pane of the console, choose **Functions => Manage CIs**.
- 2 From the CI Type list of the Manage CI Information dialog box, select **Bulk Inventory => Bulk Inventory**, and click **Create**.
- 3 In the Bulk Inventory form, complete the following required fields.

Field name	Description
CI Name	Enter the name of the bulk inventory item, for example, Microsoft Windows XP.
Tier 1, Tier 2, and Tier 3	Categorize the item.
Received Quantity	Enter the number of items received.

- 4 Click **Save**.

### To create an inventory location CI

**Note**

You can use inventory location CIs to indicate where bulk inventory and other CIs are located.

- 1 From the Navigation pane of the console, choose **Functions => Manage CIs**

- 2 From the Type list of the Manage CI Information dialog box, select **System => Inventory Location**, and click **Create**.
- 3 In the CI Name field of the Inventory Location form, enter the location name.
- 4 Complete the optional fields.
- 5 Click **Save**.

## Inventory management

You can use the Manage Inventory function to track bulk inventory items and other CIs that are available for deployment.

Before you can track inventory, you must:

- Create bulk inventory CIs, or other CIs to be tracked as inventory. For information about how to do this, see [To create a bulk inventory CI on page 196](#) or [To create a computer system CI on page 194](#).
- Create inventory location CIs. For information about how to do this, see [To create an inventory location CI on page 196](#).
- For bulk inventory, specify the received quantity and the inventory locations. For information about how to do this, see [To place bulk CIs in inventory on page 198](#).
- For non-bulk inventory CIs, set the inventory status to In Inventory, and select a location. For information about how to do this, see [To manually track the time spent working on a task on page 135](#).

The following list of topics are covered in this section:

### Placing bulk CIs in inventory

To place bulk CIs in inventory, you must specify the location or locations for them.

---

**Tip**

If you do not see a location, make sure that the CI has a CI type of inventory location, and not physical location. For information about creating inventory locations, see [To create an inventory location CI on page 196](#).

---

### To place bulk CIs in inventory

- 1 Open a bulk CI, as described in [To search for CIs from the console on page 199](#).
- 2 On the Inventory Location tab, click **Add**.
- 3 In the Search Inventory Locations dialog box, specify the search criteria and click **Search**.
- 4 Select a location, and click **Relate**.
- 5 In the message about the relationship, click **OK**.
- 6 If the inventory is stored in multiple locations, for each location, repeat [List item. on page 198](#) and [List item. on page 198](#).
- 7 Click Close.

On the Bulk Inventory form, the Inventory Location tab lists each of the related locations.

- 8 Click in the **Quantity Per Location** field for a location, and type the quantity in that location.
- 9 Continue to enter the quantity for each location, until all the quantity in stock for the bulk CI is accounted for.
- 10 Click **Save**.

After items are in inventory, you can use the Manage Inventory function to:

- view
- relocate
- reserve and use CIs and bulk inventory items

## Placing non-bulk CIs in inventory

You can place non-bulk CIs that you want to manage in inventory by changing the status of the CI to In Inventory, and then designating a location for that CI.

### To place non-bulk CIs in inventory

- 1 Open a CI, as described in [To search for CIs from the console on page 199](#).

- 2 From the Status list, select **In Inventory**.
- 3 Click **OK** in the confirmation message that appears.
- 4 In the Search Inventory Locations dialog box , from the Location list, select a location, make sure other values are correct, and click **Search**.
- 5 Select a location and click **Return**.

## Managing inventory tasks

This section describes how to perform inventory management tasks that you most commonly use.

The following tasks are described:

### To search for CIs from the console

- 1 From the Functions area of the console Navigation pane, click the **Manage CIs** link.
- 2 From the CI Type list on the Manage CI Information window, select the type of CI you are looking for and click **Search**.
- 3 On the form that appears, provide as much information about the CI you are searching for as possible and click **Search**.
- 4 From the search results list at the top of the window, select the CI.

The details appear in the CI form below the search results.

### To view inventory locations

- 1 From the Navigation pane of console, choose **Functions => Manage Inventory**.
- 2 Enter your search criteria in the Manage Inventory dialog box, and click **Search**.

Results matching your search criteria appear in the table.

- 3 Select a CI or bulk inventory item from the table, and click **View Location**.
- 4 View the CIs in the inventory listed in the Inventory Location form.
- 5 Click **Close**.

### To relocate CIs

- 1 From the Navigation pane of the console, choose **Functions => Manage Inventory**.
- 2 Search for inventory in the current location using the Manage Inventory dialog box.
- 3 Select the CI or bulk inventory item you want to relocate, and click **Relocate CIs**.
- 4 For the location where you want to relocate the CI, specify search criteria, and click **Search** in the Search Inventory Locations dialog box.
- 5 Select the location where you want to relocate your CI.
- 6 In the Quantity field, enter the number of CIs you want to relocate.
- 7 Click **Relocate**.

### To reserve and use inventory

- 1 From the Navigation pane of console, choose **Functions => Manage Inventory**.
- 2 From the CI Type menu in the Manage Inventory dialog box, select the CI or bulk inventory item you want to reserve and use.
- 3 Click **Search**.
- 4 Click in the Transaction Qty column and enter the number of assets or bulk inventory items you want to use.
- 5 Click **Reserve/Use Inventory**.

The number of CIs or bulk inventory items in the Qty in Stock column is reduced by the number reserved and used.



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