Incident and Problem Tickets in Service Desk

Browser Requirements

- Chrome is not officially supported, but has been working for us so far. Firefox is supported.
- You will need to enable pop-ups. In Chrome and Firefox, the first time you use Remedy you may see an icon in the address bar - click this and follow the prompts to enable pop-ups.

- Chrome - icon looks like For more information, see https://support.google.com/chrome/answer/95472?hl=en
- Firefox - icon looks like For more information, see http://support.mozilla.org/en-US/kb/pop-blocker-settings-exceptions-troubleshooting

Incident Tickets

An Incident ticket is the core of the BMC IT Service Management suite, and is what CIS will be using to replace the home-grown HDTicket, AUProblem, CIRT, Busted, and Media Busted schemas. We will be using Incident Tickets to track degradations and outages of Brown services, all contact with the CIS Help Desk, and also some requestable items that had been managed through the legacy ticket types.

In general, ITIL recommends that **an Incident be filed for each interaction with the Service Desk** - that is, if three individuals call to report that there's a degradation or outage of a service, then three separate tickets should be filed. Remedy has capabilities of linking these tickets together, so they can be managed together. Beyond this, Incidents are used to provide documentation for "how do I?" questions submitted to the Help Desk, and for the tasks that had been "Make Request" in the HDTicket and AUProblem schemas, such as a request for access to a file on a shared drive in a PROD or QA environment or request to reset a password. There are a lot of fields in the Incident ticket that we are not using right now. For example, "Target Date" will not trigger any communications or actions, so it's best not to use this field at this time.

Creating a New Incident Ticket

1. Go to http://remedyweb.brown.edu.
2. Hover your mouse over the "Applications" menu on the left side to open it, then click the Incident Management link.
3. Choose "New Incident"

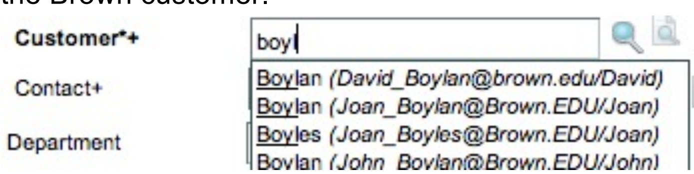
If you do not see "Incident Management" in your left menu, please contact the CAP office to check your Remedy permissions.0

When you choose “New Incident”, a ticket number is automatically assigned. If you do not end up using the ticket, the number is discarded and skipped in the Incident Database.

Identify the Customer

For every ticket, the first step in submission should **always** be to identify the customer - placing this information into the ticket kicks off the ability to leverage workflow. Most tickets will be filed for members of the Brown community, but we do have generic usernames available in case the customer does not have their name listed in the Brown LDAP directory.

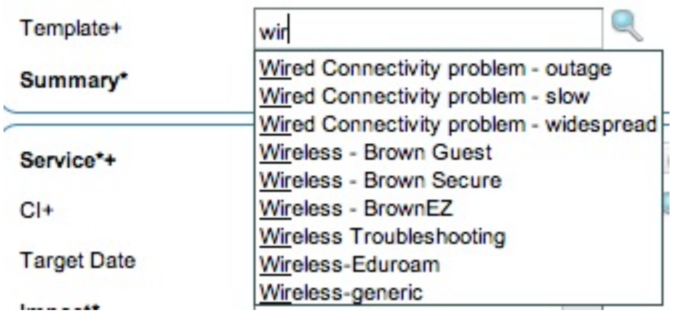
How to identify the customer: within the ‘Customer’ field begin typing the *last name* of the Brown customer.



a. A listing of similar names will appear. Select the correct user. If the name is a common one, verify the email address with the user to ensure that you are selecting the correct user record. You can use the up and down arrow keys to move up and down the list if there are many names.
    i. If your customer is not affiliated with Brown (for example a parent) you can use one of the generic affiliate types such as “Guest”, “Parent” or “Applicant”.
b. On the left menu bar you will see an option for ‘Customer’s Incidents’. Select this option to determine if the user already has an open incident for the request. If so, open the existing and applicable incident. If not, continue creating the new incident.
Note that you only need to fill out the Contact field if there should be a different contact for the ticket, for example a DCC.

Choose a Template

When using the Incident application via remedyweb.brown.edu, if possible you should use a template to pre-fill many fields - this helps us stay consistent and collect the correct information. A Template provides a way to fill out many fields simultaneously, sets the first assignment of the ticket, and populate the Notes field with the information needed to appropriately troubleshoot the incident or complete the request. Start typing in the template field, and you'll see the templates that match your search. Once you choose an appropriate template, other related fields will be filled in.



Skip to the 'Template' field and begin typing in the words that describe the user's issue. Example: If you begin to type "wireless", you will see a number of wireless templates. Select the template that best matches the incident topic.

a. If a template that describes the issue does exist, select the appropriate template. The template you select will automatically populate the notes field with information and questions that will help you to collect the data needed in order to quickly resolve the incident issue.

b. If no template exists, make sure you fill out these required fields which are usually handled by the template (and more, if possible):

- Summary - This free text field (limit of 256 characters) should be used to define the issue at a higher level. This field also reminds the user of the reason for the ticket. (This is especially helpful if the user has more than one active incident within our system). While summary fields that are pre-populated when using a template don't need to be altered you may add some wording within this field if you feel it will help the end user communication when creating or updating an incident. For example, you select the 'Wireless-Brown Guest' template so the summary field populates with 'Brown Wireless-Guest'. You could add 'User Cannot Connect to' before the words 'Brown Wireless-Guest' to help the user better track their incident progress.
- Impact - How many people is this affecting - what is the impact on business? Extensive / Widespread, Significant / Large, Moderate / Limited, Minor / Localized
- Urgency - The extent to which this Incident can bear delay. Critical, High, Medium, Low
- (Note that the combination of Impact and Urgency automatically calculates the Priority of the ticket)
- Ticket assignment - choose the appropriate group, and the individual assignment

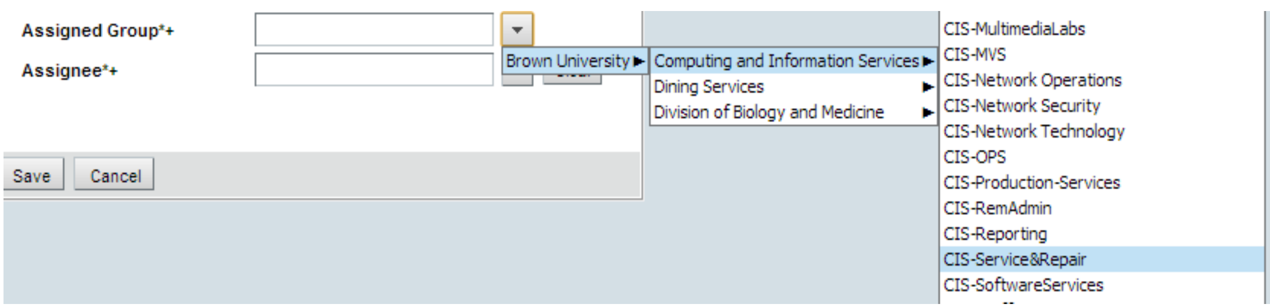
will be determined automatically per the group's on-call rules.

In the 'Notes' field gather all information regarding the incident. If using a template, answer all questions and gather all information being requested. If you are not using a template, the 'Notes' field will be blank but should be populated with as much information regarding the incident as possible. Example below:

- Gather additional information about the customer (affiliation, end date if any, etc)
- What is the issue?
- When did the problem start?
- What might have happened prior to the problem beginning (system update, system crash, user affiliation update, etc)?
- What network (if any) is being used and can the problem be replicated when using another network (ex: Brown wireless, LAN, home network, etc)?
- Do others have this issue?
- Can this issue be seen when using another computer or device?

Assigning a ticket

If you are using a template, the first assignment group should be automatically filled in. If you are not using a template, you should choose the correct Support Group by navigating to Assigned Group and selecting the correct group from the drop-down menu.



If you are escalating an existing ticket, follow the same procedure. Make sure that you've provided a recent update to the ticket's Work Info section with as many details as possible. You can add "work info" entries to the ticket as ticket updates. They will appear in the "Work Detail" area of the ticket (to the right).

If a Ticket is Assigned to You

Claim the Ticket

First, "claim the ticket" by changing the status to "In Progress".

Update the Ticket

Adding Work Info Entries

After submission, most ticket work occurs in the right side of the ticket. You can add "work info" entries to the ticket as ticket updates. They will appear in the "Work Detail" area of the ticket (to the right).

Sending Emails to the Customer

All emails should be sent through the system so they are documented in the ticket. Using the Function->Email System menu on the left, you can send email directly to the customer or others. All emails sent and received through the system will be logged in the "Work Detail" area of the ticket (to the right). **Make sure to leave the ticket number in the subject line-this is very important! Spell check is not available if you are using Internet Explorer, so make sure that your spelling is correct.**

Updating the Ticket by Email

The customer will be able to update the ticket automatically by replying to the initial mail or any message sent from the system - the key to the email being received by the system is to make sure that the Incident Number is in the subject line of the message. Make sure that end users are aware of this functionality.

Changing the Status of a Ticket

If you have resolved the customer's issue:

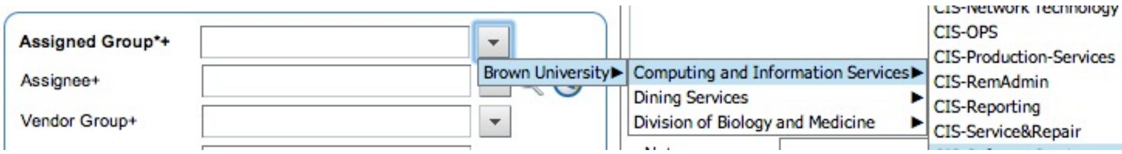
- set the ticket to "Resolved"
    - Note that we should always use Resolved instead of Closed otherwise we will never be able to re-open the ticket.
    - Resolved tickets are automatically closed in ten business days.
    - Customers receive a resolution email encouraging them to reply if the issue is not resolved.
- In the Resolution box that pops up:
    - choose from the Resolution Status Reason drop-down menu
    - type customer-friendly details in the Resolution textbox - *note that these details are sent to the user*
    - type technical resolution information in the Work Info notes
    - save

If the issue has not been resolved and you plan to work on it more:

- "claim the ticket" by changing the status to In Progress
- save

If the issue has not been resolved and it needs to be escalated to another group:

- change the ticket assignment by using the pull-down menu in the "Assigned Group" field. You should assign the ticket to the appropriate group (don't choose an individual).
- Once you save the ticket, the group will be notified that they have a ticket assigned to them.



Problem Tickets

Problem tickets will be handled primarily by Tier 2 teams (technical teams / subject matter experts), but can be filed by anyone.

When to Create a Problem ticket

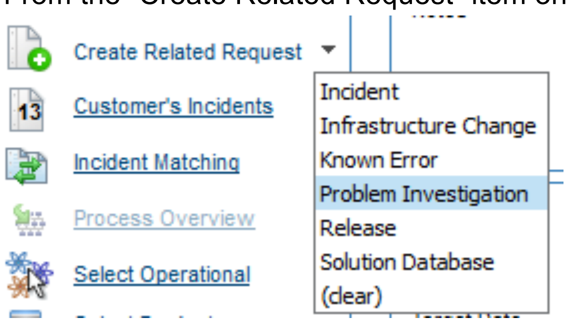
- every time we would trigger the Service Outage Communication process
- for high-impact, recurring, or non-routine incidents
    - high-impact: www.brown.edu is down
    - recurring: when you have multiple simultaneous incidents with the same underlying cause
    - non-routine: we're seeing an incident that we've never encountered before, and more research is needed
- when incidents require a change (should invoke the change management process)
- if you know about a problem, even if it hasn't caused incidents
    - You know that a change is needed in an enterprise application, or else errors will occur soon.

How to Create a Problem Ticket

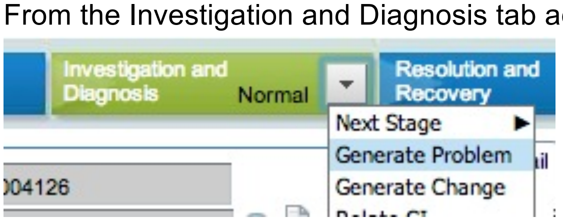
From an Incident

There are two ways to create a problem ticket from an existing incident:

- From the "Create Related Request" item on the left menu select Problem Investigation



- From the Investigation and Diagnosis tab across the top - choose Generate Problem



Note: if the option to create a problem ticket is greyed out, you have not entered all necessary fields in the Identification and Recording tab.

From the Problem Management Console

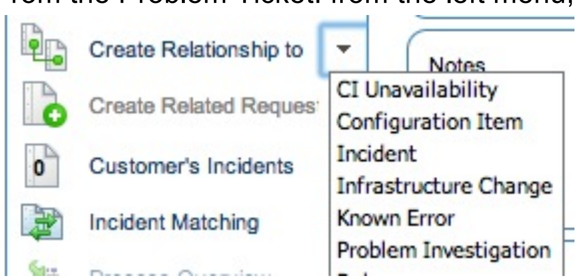
If the problem has no related incidents, you can create the Problem directly from the Problem Management Console. Using this method, you will have to fill out all required fields, since they aren't carried forward from an incident.

Relating a Problem Ticket to More Incidents

If created from an incident, the problem ticket is automatically related to that incident. You can also relate it to more incidents:

- From the Incident Ticket: from the left menu, choose Create Relationship to > Problem Investigation

- From the Problem Ticket: from the left menu, choose Create Relationship to > Incident



Problem Coordinator Roles

- Coordinator Group - this is usually the group who helps make decisions about what should be done to resolve the Problem. Most often, the Coordinator Group will be the Tier 2 group that is (or works closely with) the Service Owner.

  The Problem Coordinator will most often be the Manager of the Coordinator Group, but can be anyone who makes decisions on how to resolve the underlying issue. For Problems that are high-profile, the Coordinator Group will be CIS-Directors, and the Director responsible for the service will act as Problem Coordinator.

- Assigned Group - Assignment of Problems works similar to that of Incident Tickets. The Assigned Group is the team which will currently needs to work on the issue. When you select this group, you should not manually choose an Assignee - that will be selected within the team when the Problem is assigned. The On-Call functionality that has been added to Incident tickets does not currently work for Problem Tickets.

- If you are the Problem Coordinator, you will handle communication between the group assigned to work on the Problem and the Help Desk or appropriate Tier 1 group (such as Production Services). You will be confirming problems when they have been submitted to the "Review" process (more info below) to move them to the "Investigation and Diagnosis".

Update a Problem Ticket

Required Fields to File a Problem

- Service - type to filter the list
- Summary - write a short summary of the problem (< 250 characters)
- Investigation Driver - why are we creating this problem? drop down menu.
- Impact
- Urgency (see Incident for description, above)
- Status

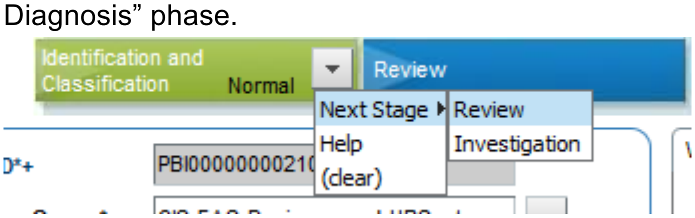
Non-Required Fields

- Vendor - the name of the vendor we are working with to resolve the Problem
- Vendor Ticket Number - the Incident/Problem number opened by a vendor for this Incident
- Workaround - way of helping a Customer work around the underlying issue

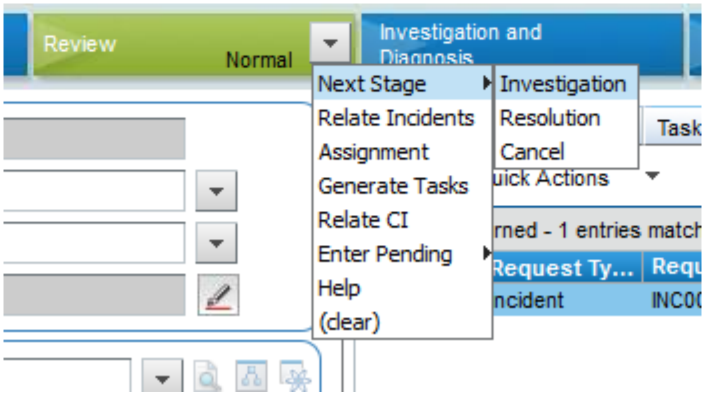
Problems work in a similar way to incidents - the ticket moves from left to right across the problem bar (tabs at the top of the ticket).

Investigation and Classification tab on the Process Bar (Lifecycle Bar)
When you create a problem ticket from an incident ticket status is "Under Review" and Assigned Group is not completed. These fields can be completed as explained above.

To move to the next phase under "Identification and Classification" and then you can choose from either:
Review - Review allows the Problem Coordinator to confirm the problem
or
Investigation - then the Problem Coordinator moves the ticket into the "Investigation and Diagnosis" phase.



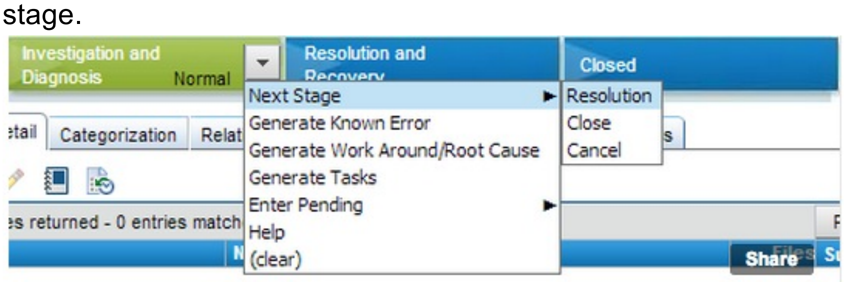
Investigation phase allows you to choose an Assignee for the problem so it can be worked on by the appropriate Assigned Group member to diagnose the problem



Legacy AU-Change Request
If a Change Request is need you can create one on the bottom of the new Problem Ticket (these are for the Production Services Group) the button says "Create Change Request" on the bottom left. Clicking on this button will open an AU Change Request ticket. The AU Change Request process and workflow has not changed, so if you have experience filing AU CRs, you will not notice any differences. Fill out the Change Request as you normally would. The related PBI ticket number will be auto filled on the Work Section tab.

Change Requests Related to Assets
If the problem creates the need for a change related to assets in the CMDB, then choose "Create Related Request" from the left menu and create a Task.

Resolve a Problem Ticket
From the Resolution and Recovery tab on the top, choose Next Stage to move to the final stage.



When a problem ticket is set to Resolved, all related incidents will also be Resolved. In most cases, the text in the notifications users receive will be general enough to let them know they should contact us if their incident is not actually resolved. There might be some cases in which we want to contact users directly with specific instructions about their incidents - this would be completed by the Help Desk.

Problem Coordinator: The problem coordinator confirms that the change has solved the problem. Then, the problem coordinator sets the status of both the problem investigation and the known error to Closed.

Known Error

After a problem investigation identifies the cause, this information can result in:

- A known error, which describes the root cause as well as the proposed structural solution to remove the root cause.
- A solution entry that describes how to work around the issue Known error

A known error is a problem that has been successfully diagnosed and for which a permanent solution has been proposed or completed.

After the root cause analysis of a problem investigation is completed and a structural solution has been proposed, a known error is created to request that the proposed solution is implemented. The implementation of the proposed solution is part of the change management process. A known error process can have one of the following results:

- A change request to implement the needed fix

- Closing the known error as an accepted issue, with updates to the knowledge database containing steps to avoid the issue

What about my open HD, AU Problem, and SysChange tickets?

As of the Service Desk go-live, you will be unable to create new HD and AU Problem tickets, but you will be able to modify/update older HD and AU Problem tickets.

As for SysChange, the SysChange process remains the same, but SysChange tickets will not be linked to any Incident or Problem tickets.

What’s Different?

- Using templates to automatically fill out several fields at once, and provide a starting point for data-gathering
- Problem Management as a separate process
- No Master Tickets
- Bar of tabs across the top of tickets
- Web form for easy ticket submission (mainly for non-CISers)

FAQs

I tried to open a ticket and close it right away and I got an error message like “you don’t have permission to close the ticket”.

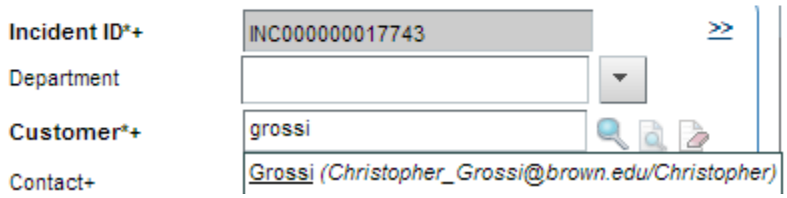
- Make sure the ticket is assigned to you.
- When first entering the ticket, don’t choose Resolved as the status right away - enter the ticket information first and then use the bars across the top to bring the incident to Closure

One Page Incident Quickstart Guide

Ticket Fields

For a New Ticket

1. **Who?** Find the customer by typing their last name into the Customer field. No need to enter a Contact unless someone else needs to be notified.



2. **What?** If at all possible, use a template. In the Template field, type a keyword (such as “wireless”). The list will be filtered - choose the correct template. This will prefill other fields like Summary, Service, Importance. If there isn’t a template, you will need to fill these all in manually.

3. **When?** Fill out the Target Date field - this is the future time at which the customer needs the ticket complete, or the expected turnaround for completion of a typical similar Incident.

4. **The Details.** If using a template, the Notes field will have specific questions that you should ask the user. If not, provide as much information as possible.

5. **Assignment.** Templates will automatically assign to a group. If not using a template, choose a group manually, but in either case do not assign to an individual (only the group).

Adding Information

- To add information, use the **Work Entries** on the right side
- If you need to send information to the customer, use the Function > **Email System** link on the left. *Make sure to leave the ticket number in the subject line!*
- If the customer replies to a notification email, it will automatically be added to Work Entries. You can also reply to emails to update the ticket.

Ticket Lifecycle

Claiming a Ticket

If you are assigned a ticket or find one that you should take, you need to claim it by setting the status to “In Progress”

Pending

You might want to change the status to Pending if you are waiting for the customer or a vendor, or the incident does not need to be resolved until a point in the future more than a week away.

All Done!

When you believe the incident is fixed, change the status to Resolved by using the Next Stage->Incident Closure menu from the top bar. *Note that the customer receives the text you type in the Incident Resolution field when the Incident is resolved, so make sure the text is customer-friendly.* The customer will receive a notification saying that they can reply to update their ticket if they still need help, and the ticket will automatically close in 10 business days. Never set the status to Closed - closed tickets can never be reopened.