

## **Home Loans**

## Standard Operating Procedure Generating a Remedy Ticket

To generate a Remedy ticket:

- 1. Log on to the Remedy Support application.
- 2. Click the New Request button. The New Help Desk Case window opens.

ielp Desk Case (New)	
🕸 New Help Desk Case	/Save
Main	
Emp No. • Category Solution Core	
Name+ Type Region Sta	
Login Name+ Item Danch	
Phone Ext. Acc Code New Ticket Same User Company Phone	anity Medum
	spe Problem
Caller Type 💌 Work Log 🛄 Son	ace ACD
General Activity Requester Information Requested For Solutions Tasks Assets SLAs Related Items	
Description ServiceWare Assign By Location	ET Remedy Groups   Yes
Source Code Retrieve Retri	Group+ Quick Assign
Form No. Cost Center	Command Center
Remarked Defense Date	Individual+ Mohammad Karim
Estimated Delivery Date Dept Name	Original Group
Initial Est Delivery Date BRD/PCR/DR	Command Center
File Name Max Sze Attach Label New Viper Form Required? Type? Y Number	Original Individual
Attachment1	Mohammad Karim
Programme and the second se	Taxe Spert (nar)
Atadward -	• <u> </u>
Quertus Refit ITMC# Loans Associated with Ca	
Audit mo   SUR mo   Loan No	Adt
OR Audit IT Yes L1 Resolvable?	Date Associated No. Type
	f Loan C Ref
L2 Resolvable?	Delete

- 3. Enter your employee number in the **Employee No.** field, then press the ENTER key. Your employee information displays.
- 4. Click the Quick Assign link on the right. The Global Assignment window opens.

Global Group Assignment	NOTE: This dialog will only populate group assignment and categorization information. It will NOT populate individual assignment information.
Search by Individual Name	Search by Group Name Search by CTI Keyword
Individual Name+	Group Member Full Name
	Click to Retrestr
	Double-click an entry to see that individual's information.
Assignment Group+	Group Name System
System Selection ● Both © Remedy 1 © Remedy 2	
Type any part of the group's name in the field and press ENTER.	Click to Reheath
CTI Keyword+	
System Selection	Category
C Both C Remedy 1 C Remedy 2	Type V
L	🔽 Cancel 🔀 Save and Return



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5. Click the arrow in the Assignment Group field. The Assignment Group window opens.

f	ssignment Group+		×						
	4111 Veronica/SA-LEE 4200 Amon Telecom Install 4200 Amon Telecom Repair Admin Agoura Telecom Install Agoura Telecom Repair AGOVMWARE ALER L3 Admin-Support								
	Open All Close All	ОК	Cancel						

- 6. Select the group to which the ticket should be assigned.
- 7. Click the **OK** button.
  - Tip: If you know the exact name of the group (i.e. West Hills Telecom Install), enter it in the Assignment Group field, then press the ENTER key.
- 8. To assign the ticket to a specific individual, select the group member's name in the **Group** Member Full Name section.

Global Group Assignment	NOTE: This dialog will only populate group assignment and categorization informatic It will NOT populate individual assignment information.					
Search by Individual Name	Search by Group Name Search by CTI Keywo					
Individual Name+	Group Member Full Name Alexis Hanley Cheryl Nahmias Donald Wingo Felipe Aspeitia Gerald Clark Until Forecom Double-click an entry to see that individual's information.					
Assignment Group+      System Selection     G Both C Benedu 1 C Benedu 2	Group Name System Command Center Remedy1					

- 9. Select the category from the Category list.
- 10. Select the type of issue from the **Type** list.
- 11. Select the item type from the Item list, if not already populated.
- 12. Click the Save and Return button. Remedy returns to the New Help Desk Case window.
- 13. Enter a summary description of the ticket in the **Summary** field on the top left.
- 14. Enter a detailed description (i.e. reference numbers, extensions, drop numbers, additional contact information, etc.) in the **Description** field.
- 15. To change the priority of the ticket, select the desired priority from the **Priority** list on the top right.

Priority	Medium 💌
	Low
	Medium
	High Urgent
	Urgent
	(clear)

16. To add an attachment:



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Right-click on the attachment section. A menu opens. a.



b. Select Add. The Add Attachment window opens.

Add Attachment				<u>?</u> ×
Look jn:	Local Disk (C:)	•	🗢 🗈 💣 🎟 •	
History History Desktop My Documents My Computer	AprWin ASE12CLT BAMTRAC Documents and Settings Earth FILES Install Install Course Program Files guarantine swsetup	Windows         WINNT         B delinks         Image: second secon		
My Network P	File name: Logon			<u>O</u> pen
	Files of type: All Files	(×,×)	<b>•</b>	Cancel

- c. Search for your attachment.
- d. Click the Open button. Remedy returns to the New Help Desk Case window.
- 17. Click the Save button.

g.

- 18. To view the Case ID (ticket number) that was generated:
  - a. Close the **New Help Desk Case** window.

  - b. Click the Search button.c. Enter your first and last name in the Name field.
  - d. Press the ENTER key.
  - e. If the Search People window opens:
    - i. Select your name.
      - ii. Click the OK button. Remedy returns to the Search Help Desk Cases window.
  - Click the Search button at the top. The Matching Help Desk Cases window opens at f. the top of your screen and displays all of your non-resolved tickets.

Matchin	g Help De	sk Cases										4
	Scope	Arival Time	Individu		Status	Summary						De
Low Medium	US	6/18/2007 11:59 18 AM 10/15/2007 12:21 40 PM	Mark Str Power P		Assigned Pending	West Hils, 8501 Falbox West Hils, 8501 Falbox			lecom Engineering			
Medium		10/22/2007 7:28:48 AM	Jery Jin		Recoived	3904 not showing any o						
4												
Sele	ct vo	ur ticket.	The	Case	e ID	field popula	tes	th	e ticket	number.		
					-							
											_	
tegory	EVNS		•	∦A ⊑	Division		-		Case ID+	HD0000009706512		
	Reques	ł		i l	Region				Chalum	, A submund	_	
pe			- <b>-</b>		riegion		<u> </u>		Status	Assigned	<u> </u>	
m	Record	er-Nice	•		Branch		-	+				
c Code		New Ticket Sam	e User	l ca	ompany			_	Priority	Low	-	
			-	-					-			
				. IP	Address				Scope			
o Tele	com Engii	neering	-	C	Drop No.				Case Type	Request	-	
Work							M		Source	ACD		
WORK	Log J								Junce	JACO		
For	Solutions	Tasks Assets	SLAs	Related I	ltems							
						iceWare —					I	
					3817	icewale	-			ET Remedy Groups [	res	