

## **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.

telp Desk Case (New)	
🕸 New Help Desk Case	/Save
Main	
See Maril AL Category	
Name	hu V
Login Name+ Item To Branch	
Phone Ext. Acc Code New Ticket Same User Company Phi	arity Hedun
Enal+ IP Address So	ope
Sumary Dttp Na Case T	ype Poblem
Caller Type 💌 Work Log 🛄 Sow	ace ACD
General Activity Requester Information Requested For Solutions Tasks Assets SLAs Related Items	
Description ServiceWare Astion Pullocation	ET Remedy Groups   Yes
Source Code Search Retrieve	Group+ Quick Assign
Form No. Cost Center	Command Center
Requested Delivery Date	Individual+
E stimated Delivery Date	District Finan
Initial E at Delivery Date BRD/PCR/DR	Command Center
File Name Max Spe Attach Label	Original Individual
Attachmonts	Mohammad Karim
Attachment2	Time Spert (nar)
Quesus Refit (TMCE Loans Associated with Ca	
Audit Into SLA Into Loan No	Adt
DR Audt IT Yes L1 Resolvable?	Date Associated No. Type
Head Schurz Company Fundation	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
	Dick to Reheats
	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 Refresh
CTI Keyword+	
System Selection	Category
🖉 Both 🖉 Remedy 1 🛡 Remedy 2	Type V
	Cancel Save and Beturn



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

P	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 Aspetia Gerald Clark Lindits: Forest Double-click an entry to see that individual's information.					
Assignment Group+	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
	(clear)

16. To add an attachment:



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



Select Add. The Add Attachment window opens. b.

Add Attachment				? ×
Look jn:	Local Disk (C:)	•	🗢 🗈 💣 🎫	
History Desktop My Documents My Computer	AcrWn ASE12CLT BAMTRAC Documents and Settings Earth FILES Instal Drogram Files Quarantine Swsetup	Windows     WINNT     BideLinks     keycode.dll     Logon.bak     Logon.tak     Logon.tag     Logon.tmp     M_logen2k     dbcconf     RHDSetup     SIGMSLDR.BAK	B <u>SIGMSLDR</u> E SIGMSLDR	
Mu Network P	File <u>n</u> ame: Logon		•	<u>O</u> pen
My NetWOIK F	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
Priority	Scope	Arival Time	Individu	al+	Status	Summary						De
Low Medium	US	6/18/2007 11:59:18 AM 10/15/2007 12:21:40 PM	Mark Str Power F	uble tarik	Assigned Perufino	West Hils, 8501 Falbros West Hils, 8501 Falbros	ik Ave ik Ave	To Te to Serree	lecon Engineering			
Medium		10/22/2007 7:28:48 AM	Jery Jin	eno	Recoived	3904 not showing any o	ptions at	bottom of	display screen			
4												
Sele	ct vo	ur ticket.	The	Case	e ID	field popula	tes	th	e ticket	number.		
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tegory	EVNS		-	∦A ⊑	Division		-		Case ID+	HD0000009706512		
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þe	Ineques	(	- <b>-</b>		riegion		<u> </u>		Status	Assigned	<u> </u>	
m	Record	er-Nice	•		Branch		-	+				
c Code	-	New Ticket Sam	e User	l ca	omnany			_	Prioritu	Low	-	
			-						- 1101KJ			
				. IP	Address				Scope			
o Tele	com Engii	neering	-	C	Drop No.				Case Type	Request	-	
Work							£ĭ⊉		Course	ACD		
WORK	Log J								Junce	JACO		
For	Solutions	Tasks Assets	SLAs	Related I	ltems							
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