Training Outline

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EASYVISTA ACCOUNTS

Your login will be your email address.

The site is:

Training and testing: https://dhs.easyvista.com

After GO Live: https://servicedesk.alleghenycounty.us

The above link currently links to your RemedyForce application.

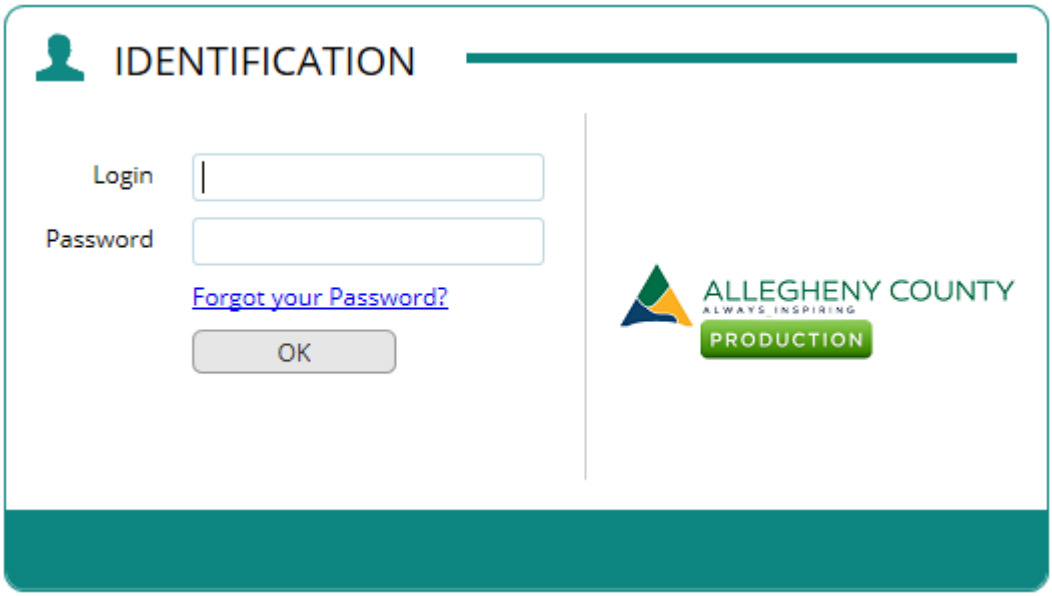


Figure 1: EasyVista Login

For Training you will use your email address as your login and your network password. If you get a login invalid, please contact EasyVistsa admin for assistance or ask your trainer.

Easyvista Environment

SELF SERVICE ENVIRONMENT

After you login you will see the Easyvista application as shown below, if you are a Front Office (Self Service) user. If you are a back office user, simply click the Home tab and then Home again. We will go over the Back Office site after completing the Front Office site. The Front Office is what is used by the end users of the application rather than the technical users of the application.

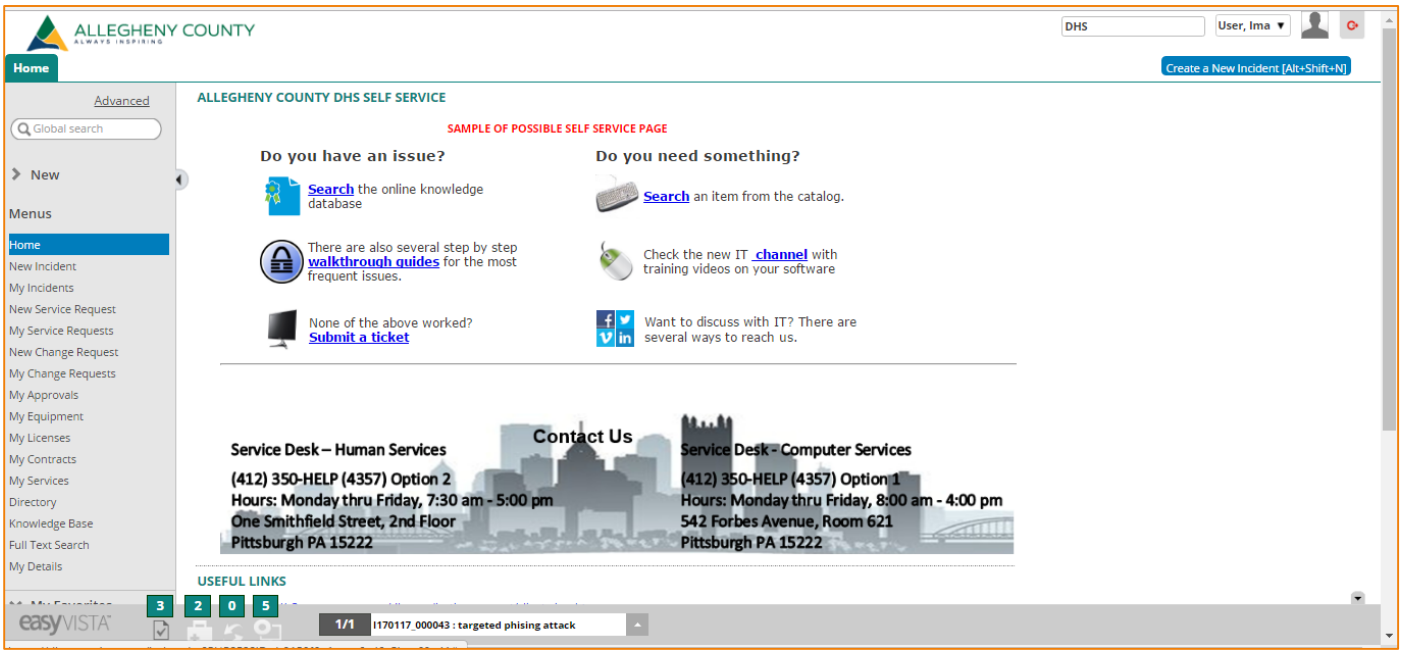


Figure 2: Easy Vista Self Service Environment

HOME TAB

Notice your home tab at the top left under the Allegheny County logo; this is your navigation bar that lets you access all the menu items to which you have been given access.

MY DETAILS

Your information is visible in the user information zone which you access by clicking on the icon ▼ to the right of your name, in the upper right hand corner.

Hovering over or clicking on the ▼icon by your name will display your information and allow you to see the details of your employee record, change your password*, and set your notification options.

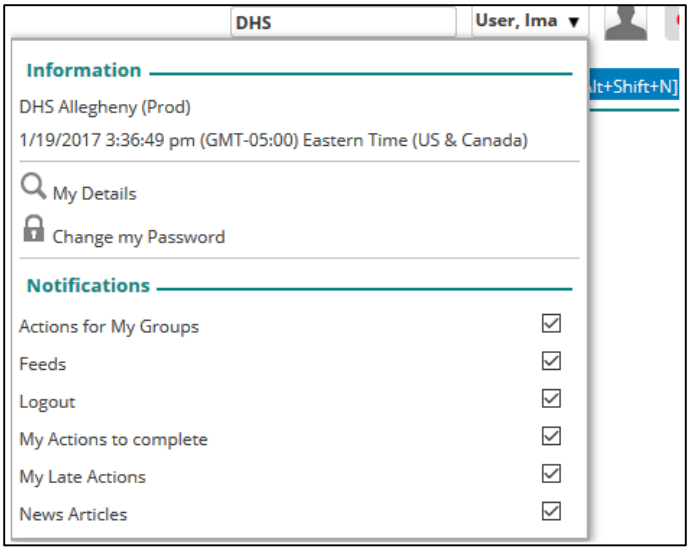


Figure 3: My Details

Notice that you can change your password, click your details to see the information on your employee record and change (add) your picture to your account.

*Note: If you change your password to something other than your network password, you will break the link with LDAP, to restore the link, change your password back to your network password.

SELF SERVICE HOME PAGE

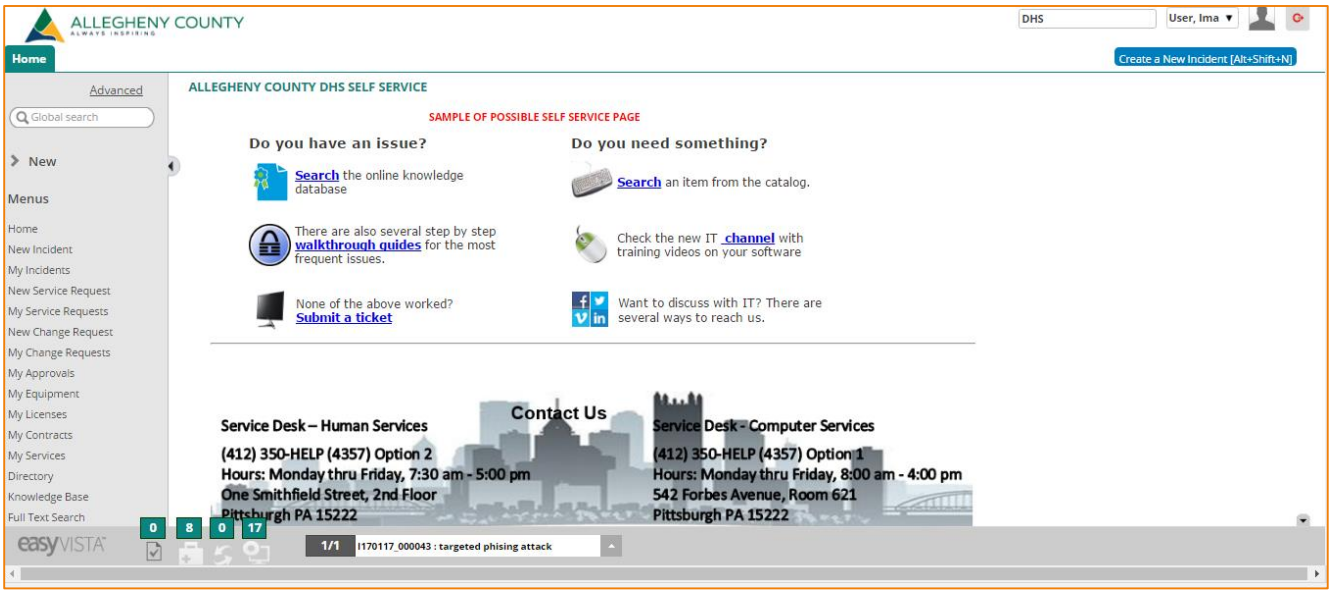
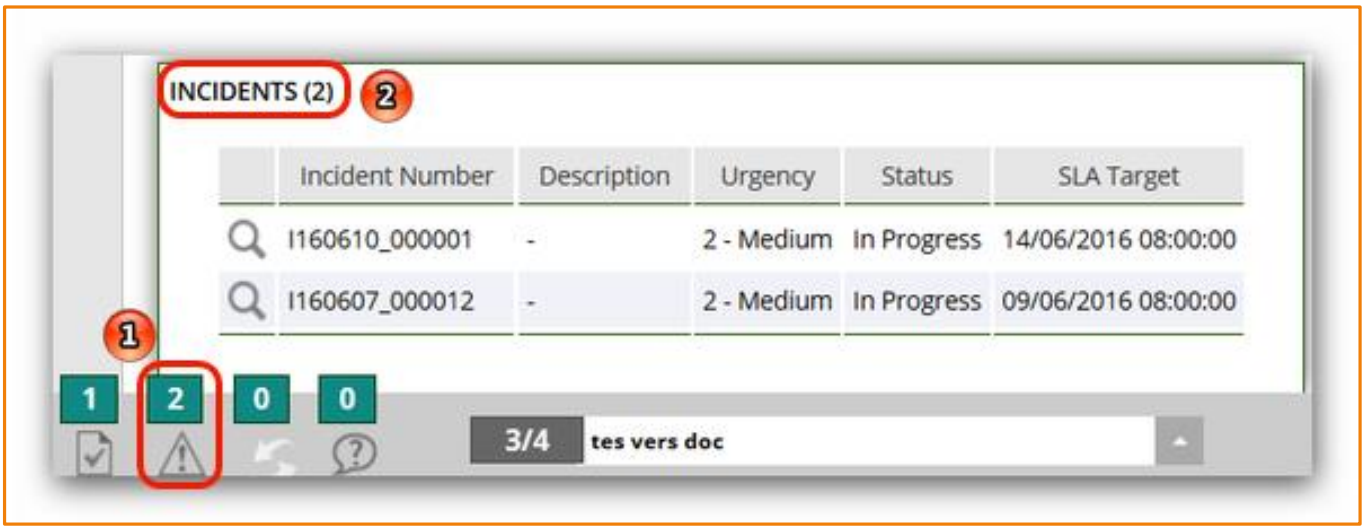


Figure 4: Self Service Home Screen Explained

1. **Home Tab** – The home tab provides access to your menu items. See Home Tab after Home Page for more information about the different sections.
2. **My Details** – The My Details area provides access to information about your account, including the Domain you are assigned, your employee record and setting your notifications.
3. **The Self Service Actions** you can access: This page is designed to serve your needs and allows you to:
   a. Search the knowledge base for an answer to your question.
   b. Access the Walk Through guides which unlocks how to use EasyVista. Each guide is a very short tutorial on an EasyVista application task or it's environment.
   c. Submit a Ticket. Clicking this icon opens the New Ticket Screen. There is information further in this guide on how to create a new ticket.
   d. Search the Service Request Catalog. If you need to: order new equipment, report a maintenance issue, request Access to or a modification of your permissions in a DHS Application, this is where you would click.
   e. Access the videos on the use of EasyVista at our new It Channel. Click the link and learn away!
   f. Connect with Department of Human Services on Social Media!

4. Quick Dashboard – Self Service: The Quick Dashboard provides you with visual information and access to lists for your open Approvals, Incidents, Changes, and Service Requests.

FRONT OFFICE QUICK DASHBOARD



To open the window: Click one of the counters **(1)**

- Click the title bar **(2)** to display the complete list of records.
- Move the mouse away from the window to close the window.

Counter	Description
	Number of *To Do* approvals assigned to the logged-in user
	Number of incidents created by the logged-in user
	Number of change requests created by the logged-in user
	Number of service requests created by the logged-in user

HOW TO USE THE QUICK DASHBOARD

To use to view your Incidents:

1. Click one of the numbers above the counter type to open the Quick Dashboard item grid for the Counter you chose. In the Screenshot below, you are choosing to view Your Incidents..

Which will display:

1. In the Front Office:
   a. Click to view the form of an incident/request.
   b. If you want to approve an incident/request:
   c. Click the counter.
   d. In the To Do window, click next to the incident/request you want. The form will open.

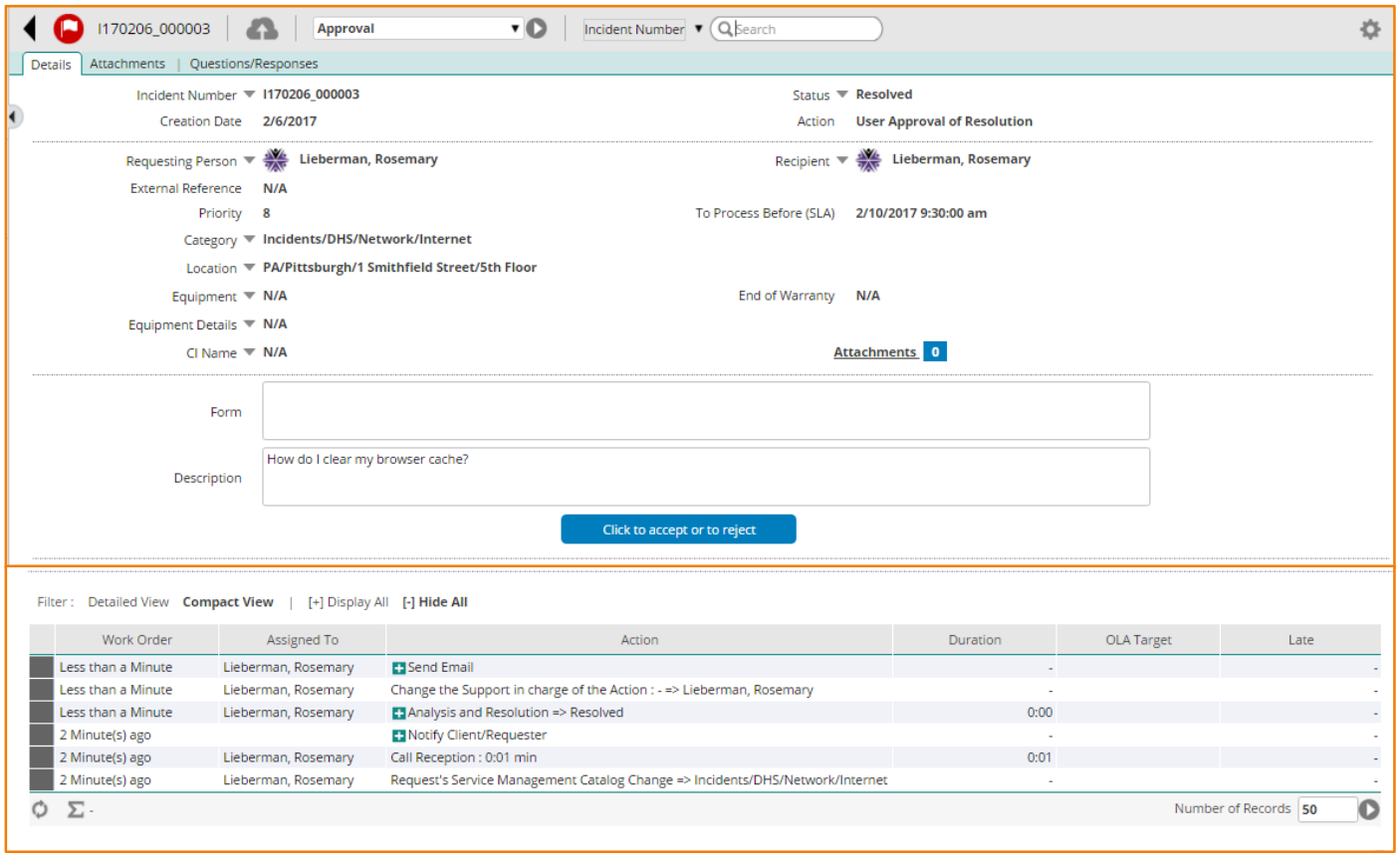


Figure 5: My Incident to Approve

e. Click **[CLICK TO ACCEPT OR TO REJECT]** and accept or reject the resolution of an Incident or the fulfillment of a request.

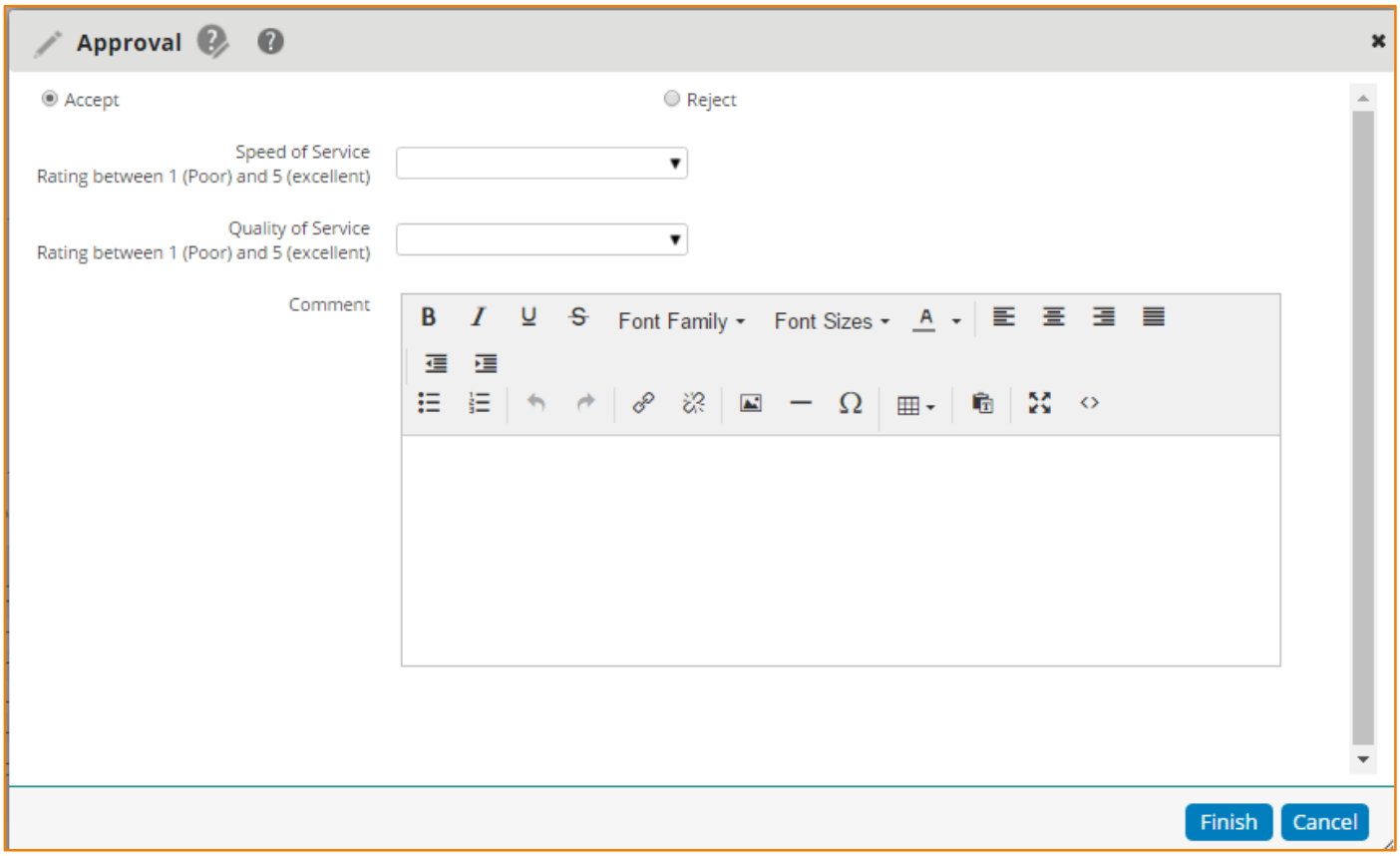
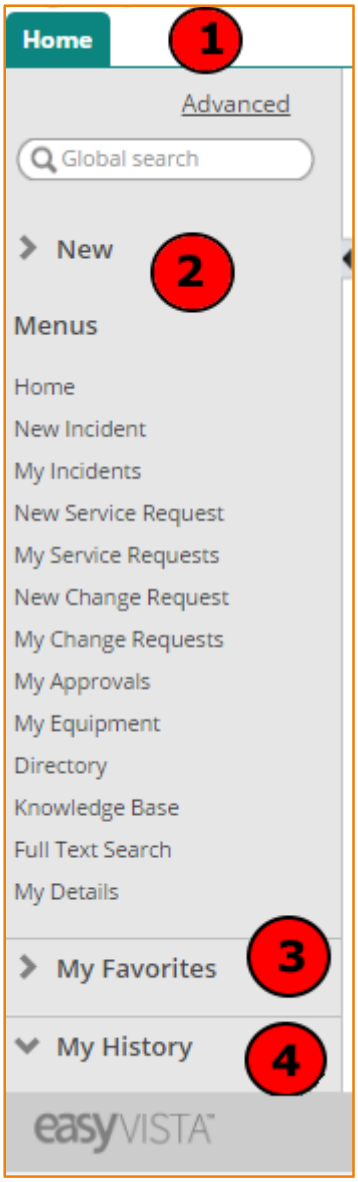


Figure 6: Approval Screen with Survey

f. The Approval screen displays and you accept or reject the resolution to your Incident, answer the Survey Questions and click Finish.

The Home Tab Details



The Home Tab is where all the resources to which you have access are located.

1. Search: You can search for record numbers for Incidents, Service Requests, and Changes or by clicking Advanced, search various other options.

a. Click Advanced.
b. Click Record Type, we will choose Equipment
c. Select Main User.
d. You can now search for equipment by the main user.

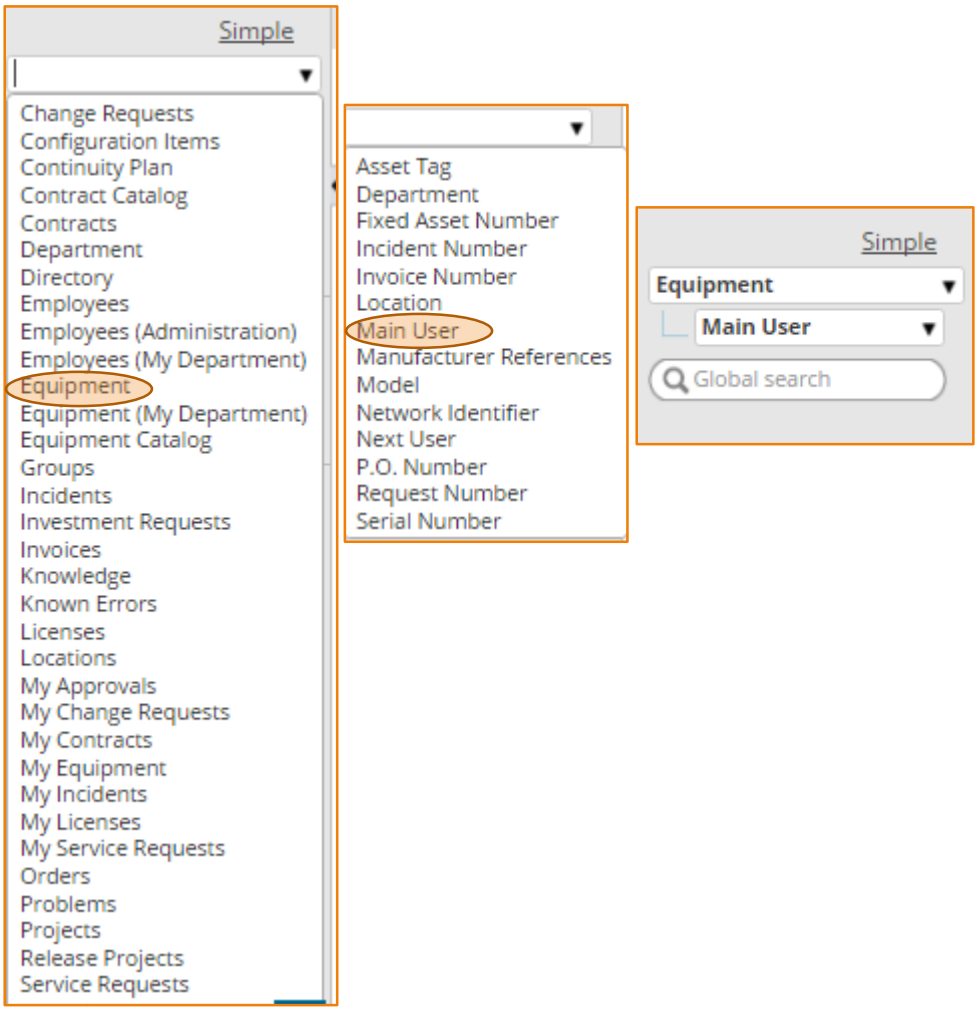
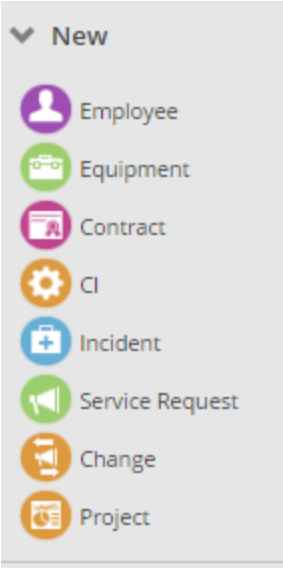
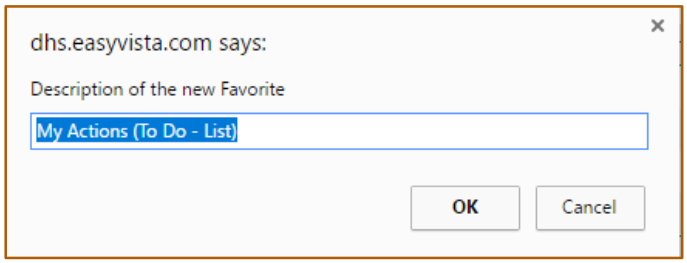


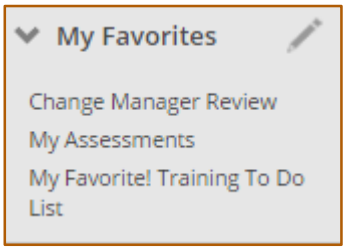
Figure 7: My Home Tab, explained



2. New Incident, Service Request, Change Request and so on. Please note, you may not have access to all the possibilities! These are limited according to policy.

3. My Favorites: When you see this icon in the upper right corner of a form, list, report, you can click the Star with the Green Plus sign and add it to your favorites.
   a. Click the icon and the Description of the New Favorite appears. Provide a name and click okay and your favorite appears in the menu. You are climited to 10 favorites.





   b. You can click the Pencil Icon to edit the list:
   c. You can reorder, rename or delete a favorite from the list.

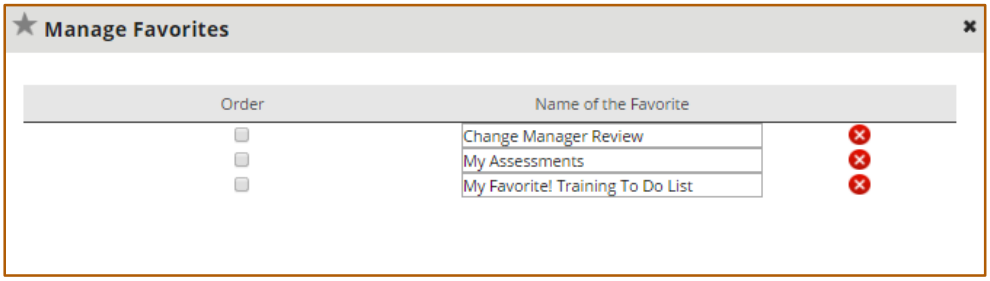


Figure 8: Editing My Favorites

4. My History is built automatically as you work. You can clear your history at any time by clicking the **Delete** trash can icon.

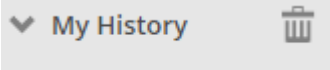


Figure 9: My History - Delete History

THE TECHNICIAN- BACK OFFICE -*HOME* PAGE

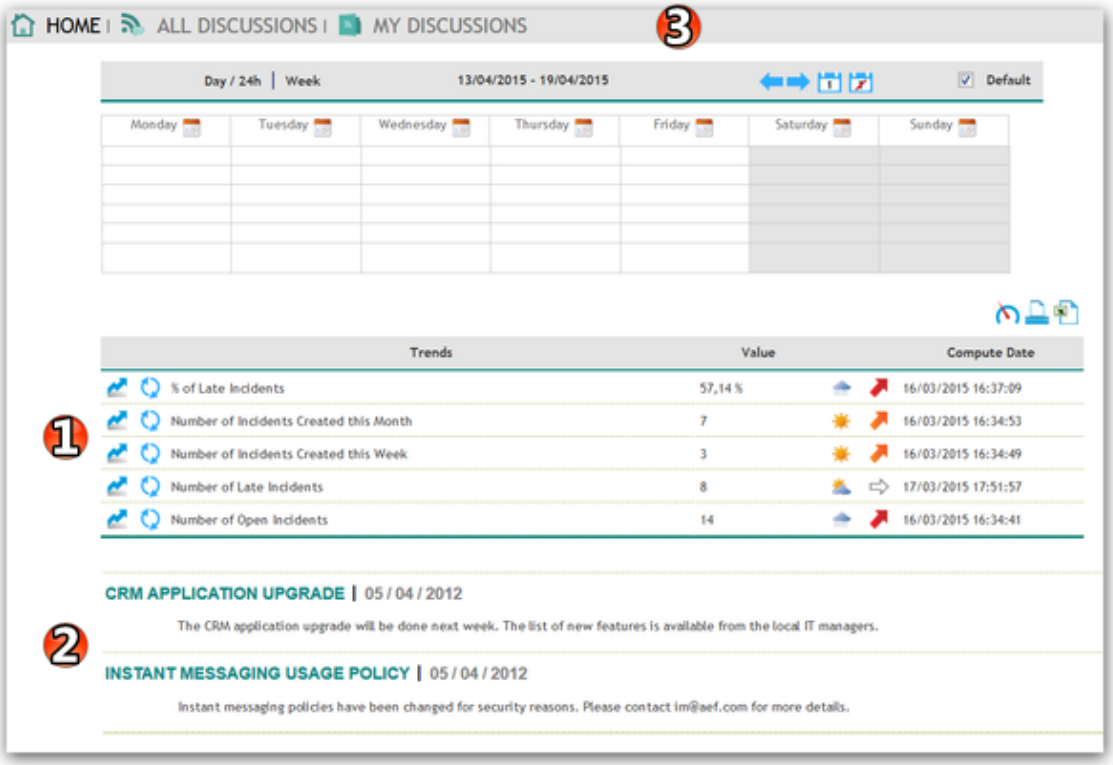


Figure 10: Home Page

The *Home* page is the first option of each menu. It displays:

- **(1)** Trends based on the connected user's profile.
- **(2)** News articles.
- **(3)** Two tabs for access to discussions.

Note: The trends and news may be hidden depending on your profile. A profile is a set of named access and permissions.

THEMES AND MENUS

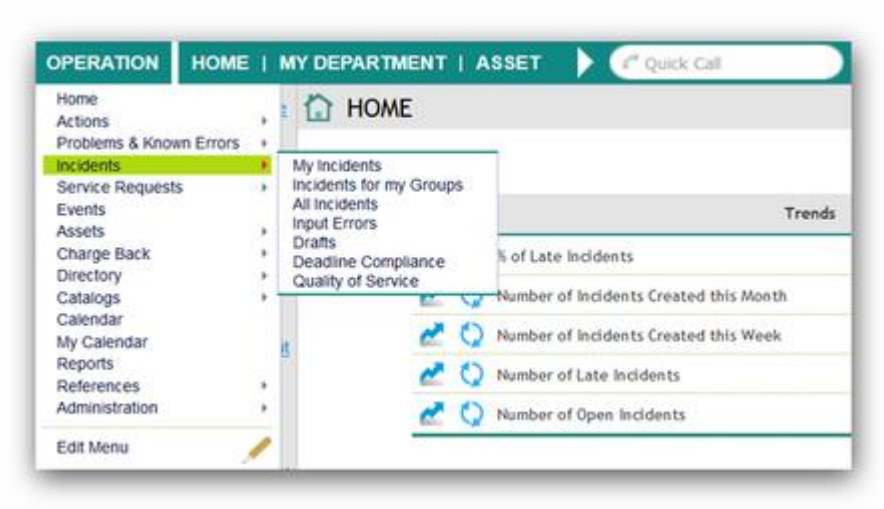


Figure 11: Themes and Menus

The Themes available depend on your license and implementation. The tabs define the major themes; Operation (Incidents), Transition (Change Management), and so on. They are displayed on the Home page and they are based on the connected user's profile.

- The menus are located on the top of the interface.
- When the resolution or type of screen cannot display all the available menus, additional menus are available by clicking ► icon displayed at the far right.

THE FAVORITES

The favorites are shortcuts towards a filter/view combination.

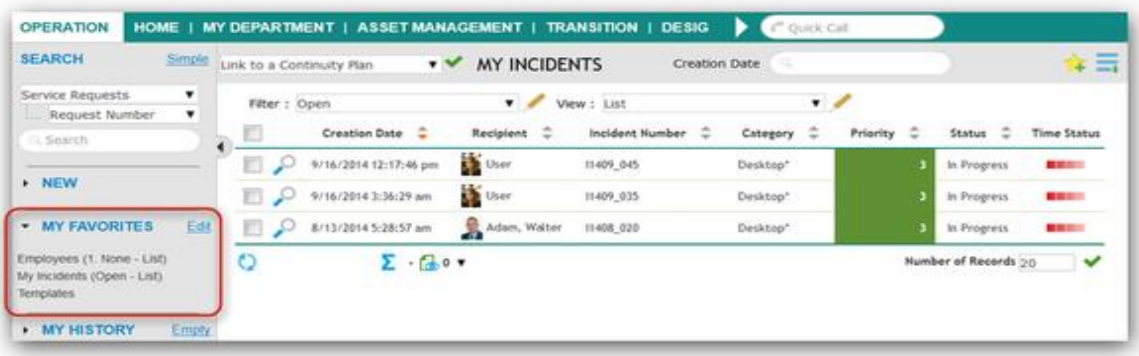


Figure 12: Favorites

Notes: The favorites are specific to each user, regardless of the workstation used, and are retained during disconnection.

- The number of displayed favorites for all users is set by the Administrator.

How to Create a Favorite Link

1. Activate the filter and the view.
2. Click on .
3. Give the favorite a name via the **Prompt** window (By default, the name consists of the menu + the filter + the view used) then click on **OK** (Note: A message may ask you to allow execution of a script).
4. To access a favorite, click on its name in the **FAVORITES** zone.

Change the Favorites Order:

- Click on the link Edit then complete the **Order** column.
- Delete a favorite: Click on the link Edit then on .

THE HISTORY

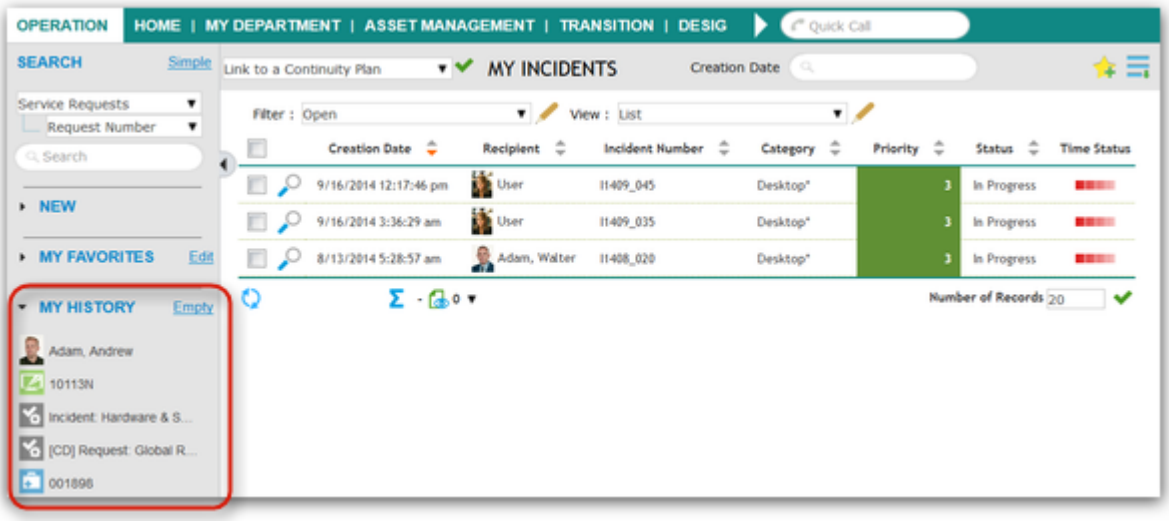


Figure 13: History

The history is automatically constructed as you navigate. It retains the last forms displayed in memory and lets you redisplay a record just by clicking.

Notes:

- The history is specific to each user, regardless of the workstation used for connection, and are retained when you log off.
- The number of links kept in the history is set for all users by the Administrator.

How to Delete your History?

- Click on the Trashcan in the **HISTORY** zone.

THE FORMS

Forms are used to access records. They are configurable, display fields and include tabs (in the upper part) that give access to related forms.

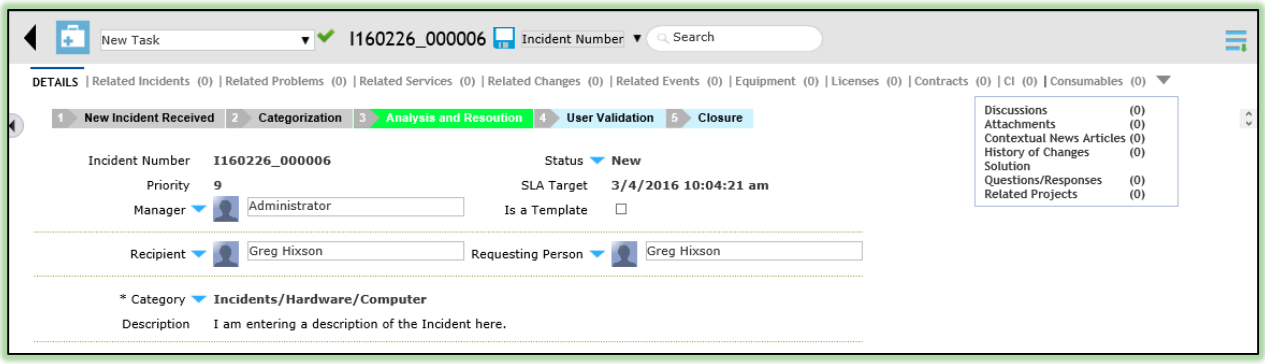


Figure 14: Forms

Upper bar

- ◀: Return to the previous page
- : Icon representing the object associated with the form, in this case Incident.
- Menu items for the form, called Wizards in EasyVista. Select one of the wizards then click on ✔ (Note: List is based on the connected user's profile)
- Name of the main object of the form (e.g.: Incident tag)
- : Save the form; Create a new record
- Search based on a list of contextual fields on the form
- : **Tools** icon displaying contextual options to the form

Contextual options with the fields by clicking on ▼ alongside a field

- *Display in Popup*: Display the related record in the window without leaving the current form
- *Edit Form*: Switch to the form for the related record.
- *Send Email*: Send e-mail (Note: Only for a *User* field)
- *Show on the Map*: Display the geolocation of an address (Note: Only for a *Location* field)
- *Display Related Information*: Display additional information associated with a type field workflow, network identifier, etc.
- *View UNSPC information*: Connect to the web site http://www.unspsc.org/ and display the information associated with a product or service (Note: Only for a *Category* field)
- *Display CMDB Graph*: Display and define the CMDB graph (Note: Only for a *Service* field)

Tabs in Forms

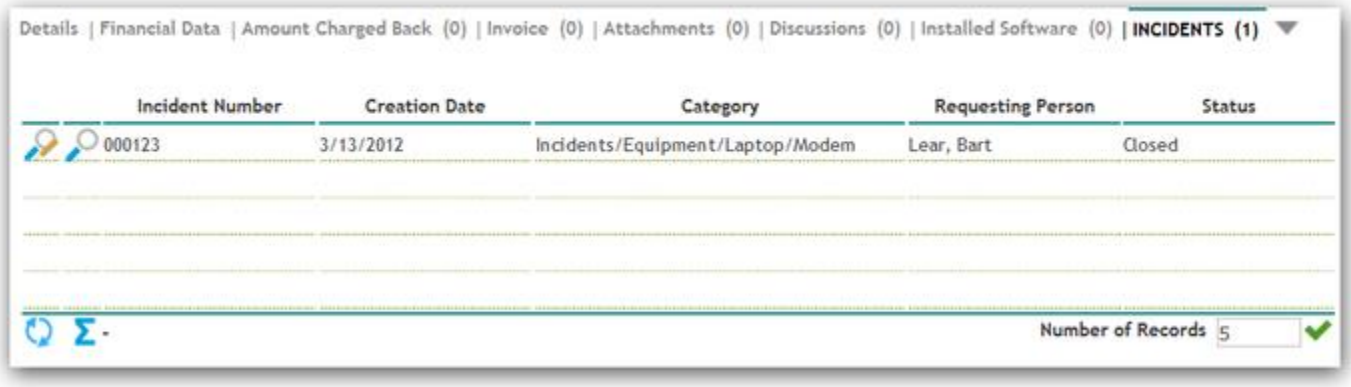


Figure 15: Tabs in Forms

- The **Details** tab is always displayed first; it contains the main information of the form.
- The number of records of each tab is displayed behind its name.
- When the resolution or type of screen cannot display all the available tabs, those that are not visible can be displayed via the ▼ icon displayed at the right of the tab bar.
- You can have a preview of each tab: position the mouse cursor on the name of tab.
- You can change the display order of tabs: click on then on *Reorganize my Tabs*. It is a configuration associated with the user's account, regardless of the workstation used for connection, and is retained during disconnection.

THE TOOLS MENU

The tools are accessible using the icon located in the upper right part of the interface. They are contextual to current mode.

- **Form mode**: The tools can display the Edit Form (providing the user has the corresponding Administrator Only permissions), modify the order of tabs, send e-mail, print a form or consult the help.
- **List mode**: The tools can edit a parent request (providing you have permission), print a list, export data (encoded or not) and get help.

THE WIZARDS

Wizards allow carrying out operations that you would typically associate with a menu.

Figure 16: Wizards

For example, when an Incident is displayed, you can choose to execute a New Task, place an Incident on Hold, Change the Urgency of the Incident and other Incident related operations. They are contextual (based on) to the selected menu or view and are accessible via a drop-down list located in the upper bar of each list and form.

Notes:

- The 5 most commonly-used wizards, by you, are visible on the top of the list.
- You can select the wizard in the list or enter the first characters of its name.
- In List mode, you can perform an overall update of records: check the desired records then apply the desired wizard.

THE NEWS

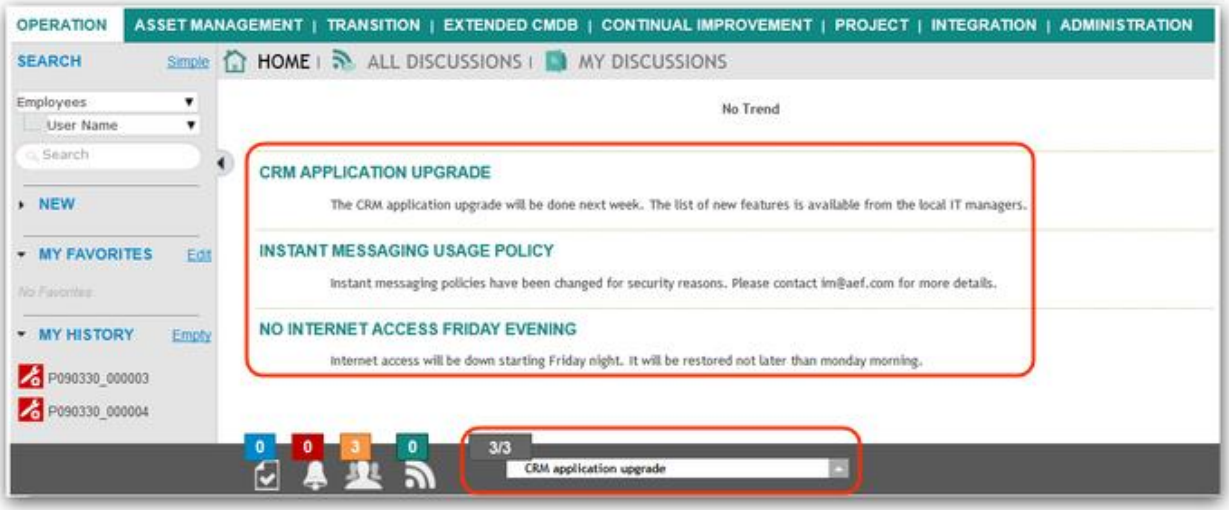


Figure 17: News Articles

The news are messages published for eV | IT Service Manager users. They are visible on the notification bar and on the homepage of certain menus too.

THE DISCUSSIONS

The discussions are places for exchanging information between users.

Figure 18: Discussions

This can be on an object such as an Incident or on any other subject (for example, an IT technologies exhibition or the new iPhone). These discussions are classified in 3 categories: event, question, information. You can share them with everyone, Public, a specific group, your department, or My Groups (the groups of which you are a member)

FUNCTIONALITIES

VIEWING RECORDS

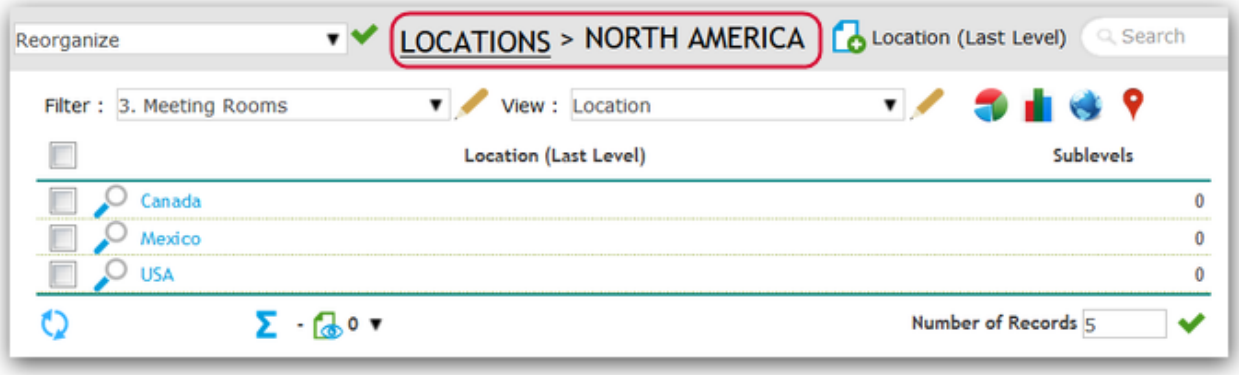


Figure 19: Viewing Records

The views allow displaying records. They are available to the user within each menu. There are two types:

- **Views by list**: Each line corresponds to a record. There is generally one list view per menu (e.g. View *List of equipment*).

- **Views by break points (grouping)**: The records are grouped according to one or more criteria (e.g. View by location).

How to navigate in a view? Use of the drilldown technique in order to access lower levels

- Only differential levels are visible (levels to which an item of equipment is attached).
- The current tree structure levels are always displayed at the top of the list.
- Click on to switch to List mode on the selected level: displays all the records of this level.

How to set the number of displayed records in lists?

Enter the desired number of lines in the **Number of Records** area in the bottom right corner of the grid.

- This parameter is specific to each user, regardless of the workstation used for connection, and are retained during disconnection.
- It is applied to all grids to all menus.
- The number of lines can also be set in the grids located on tabs.
- The maximum number of records is defined via the menu *Administration Parameters > Other Parameters > Maximum lines in grid*. It may not exceed the value of 50.
- When there are more records to be displayed than the maximum fixed for each page, a navigation bar will be automatically shown.

SEARCHING FOR RECORDS

There are various search capabilities – Global and using the Search Area.

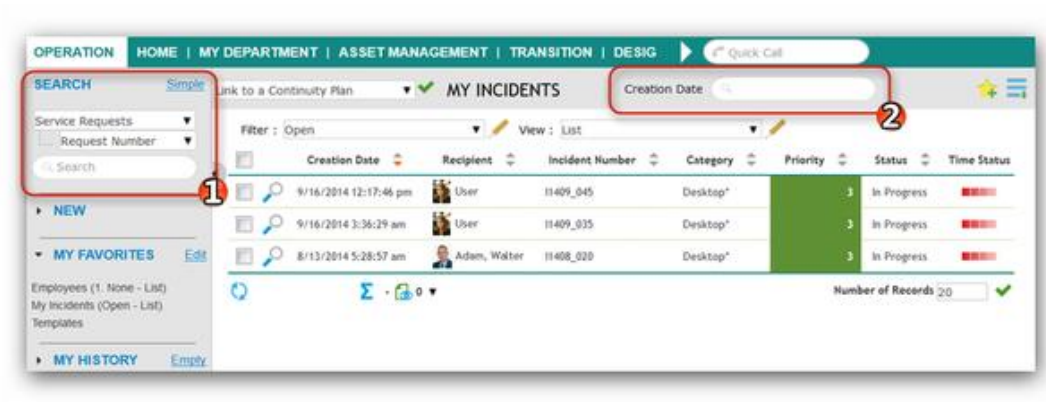


Figure 20: Searching Records Global Searches

Via the **global search** area **(1)** located in the top left part of the screen: Search based on direct selection of a record after having selected the table and the field then entering the value that is sought

- The search fields are contextual to the specified table.
  EXAMPLE Table *Employees*
  --> fields Name of the employee, Login, E-mail address, Reference number, Telephone number, Portable telephone number
- If the table is not in the current menu, the search will result in a change of menu.
- The search criteria are connected by the *AND* operator and are not case sensitive.
- To return to the full list, you must un-check the box **Active**.
-

Via the **upper search area located on the view (2)** (in List mode): Search based on the field used as a sort order in a list

- The selected field is the one used for sorting. You may choose the field on which you want to base your search by clicking the correspondent column's title.
- The search criteria are connected by the *Starts with* operator and are not case sensitive.

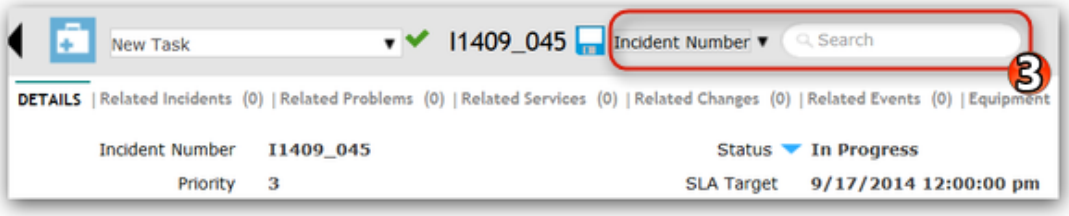
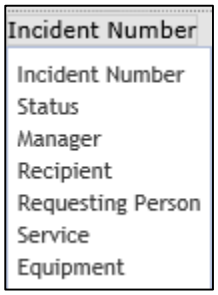


Figure 21: Searching Records - Search Area

- Via the **upper search area located on a form (3)**: Search is based on a list of specific fields for the current form. You can switch to selected record. For example, for Incident the list of search fields is:



Search help on every field based on a list of values (e.g.: Employee, Function, Asset, and Location):

You can enter the value in the entry zone of the field, helping you by **Predictive entry**: type the first letters of the record and the rest will show up automatically after the third character (Note: This value can be set by the Administrator).

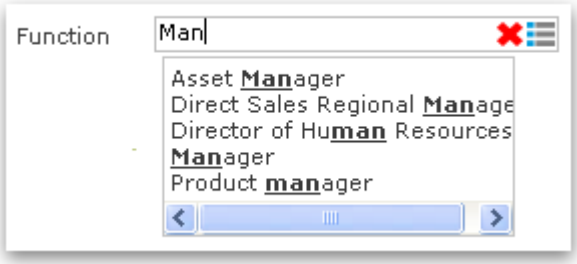


Figure 22: Predictive Search

- The first five records that meet the search criteria are displayed.
- The search criteria are connected by the *AND* operator and are not case sensitive.
- The search criteria can be entered in any order.

EXAMPLE Search criteria = Mia US

--> Shows the first five records: USA/Miami/Building 1, USA/Miami/Building 2, USA/Miami/Building 2/101, USA/Miami/Building 2/102, USA/Miami/Building 2/103

You can open a window with the list of possible values: hover the mouse over the entry zone, then click on (Note: as there's no mouse on a tablet, the icon is constantly displayed):

- On *List* fields, you can filter the results in the search area located on the top of the window.

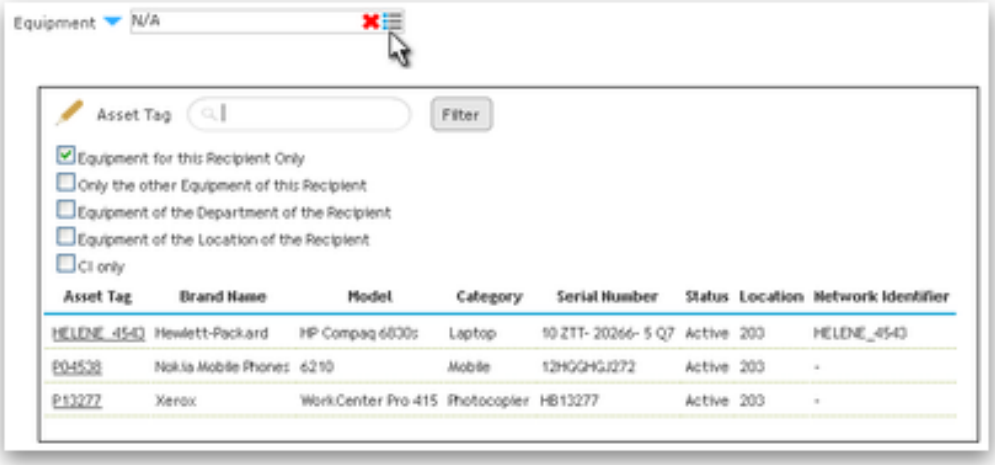


Figure 23: List Field Filter

On *Tree* fields, you can select the value directly in the tree or you can use predictive entry in the search area located on the top of window. Click on ✖ to empty the entry zone of the field.

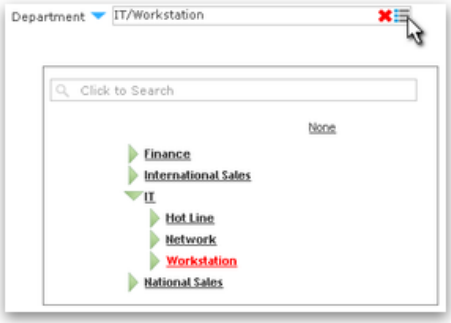


Figure 24: Tree Items

Note the Green Triangles, you click on triangles to open the tree location to the next level, and click on values to select them. The end of the line or last record in the tree is always **bolded** and **underlined.**

SORTING RECORDS

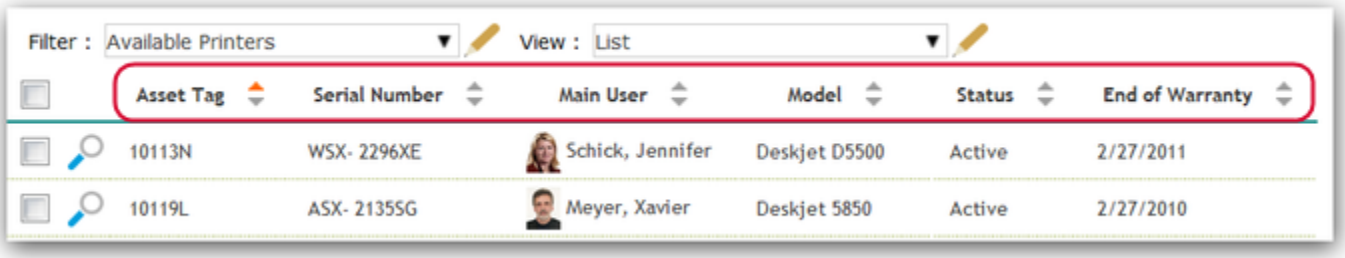


Figure 25: Sorting Records List Mode

In List mode, you can sort on any displayed field:

- On the column header, click on ▲ to sort records in increasing order and on ▼ to sort them in decreasing order
- The current sort order is indicated in red ▲ or ▼.

FILTERING RECORDS

A filter allows isolating the relevant information by applying restriction criteria. It can also be used in case an action is to be applied on a multiple selection.

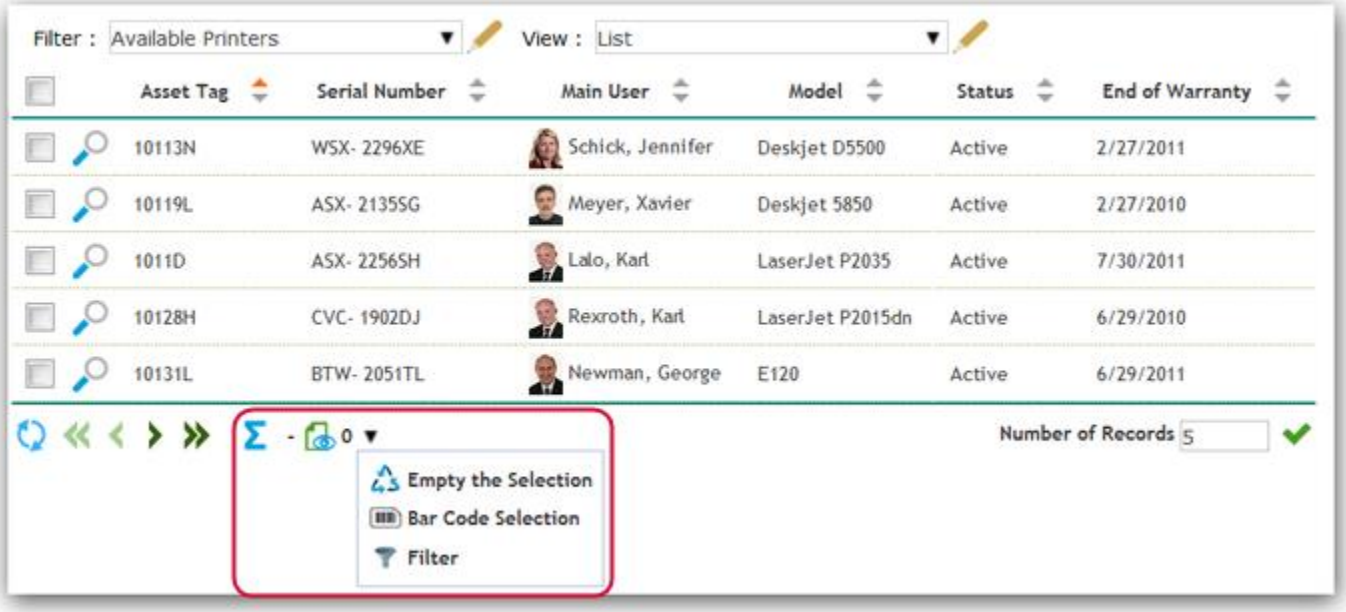


Figure 26: Filtering Records

- Click on Σ to display the total number of records in the grid.
- Click on to display the number of filtered records (checked records).

- A filter remains active as long as it is not deactivated: select *None* option in the drop-down **Filter** list.
- The page change leads to an automatic deactivation of the filter.

There are 2 possibilities of filter only available in List mode:

- Via the **drop-down Filter list**: It is contextual to the current screen and based on the connected user's profile.

- Via the **Quick filter**: In the bottom of the grid, click on ▼ then on *Filter* option.

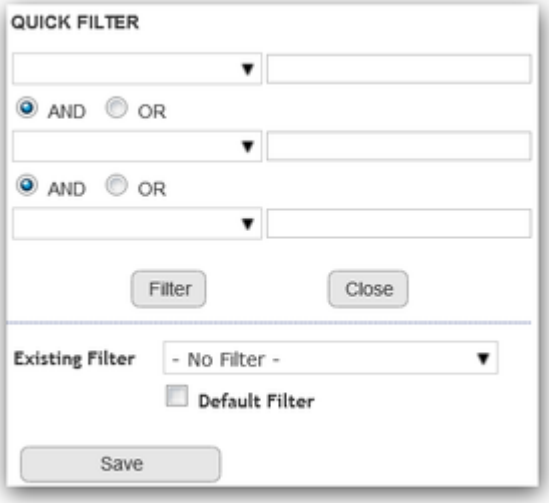


Figure 27: Quick Filter

- You can specify up to 3 search criteria connected by the AND/OR operators.
- Filtering on a tree-structure field uses the lowest level of the tree.
- It is possible to save the criteria placed on quick filters so that they can be used subsequently. They are specific to each user, regardless of the workstation used for connection, and are retained during disconnection.
- Click on **Filter** to apply the criteria: the icon changes appearance *Filter*.
- Click on Σ to update the number of records in the grid.
- To cancel the current filter, click on ▼ then on *Filter* option.

SELECTING RECORDS

Manual selection: In List mode, check the desired records.

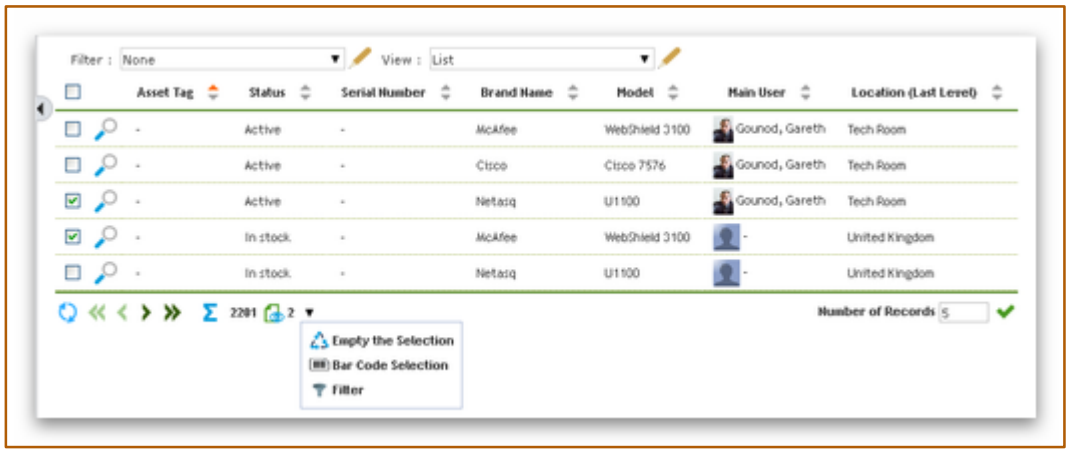


Figure 28: Manual Selection - List Mode

- The number of filtered records (checked records) appears to the right of icon and is automatically updated at each change of the selection.
- The selection may stretch over several pages: selected items on each page add to the current selection and icon is automatically updated.
- To cancel the current selection: click on ▼ then on *Empty the Selection* option.

LOGGING AN INCIDENT

Creating new Incidents can be accomplished in one of two ways.

A Quick Call is a fast way to enter a ticket with minimal effort and the New Incident process allows you to create an Incident and populate all Incident fields at one time.

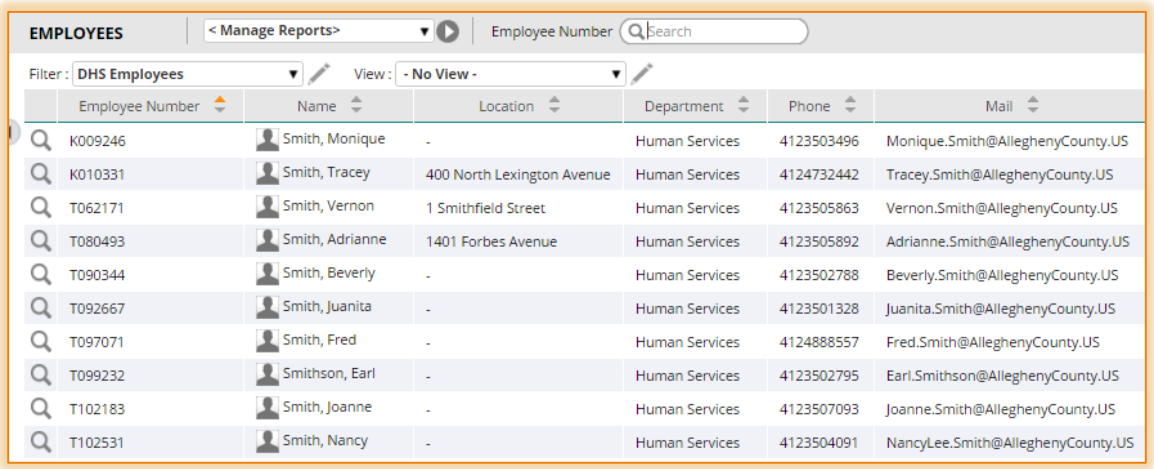
LOG A QUICK CALL

In the upper right hand corner of the screen is the Quick Call Feature. You can enter a name, part of a name (first name first then as many characters of the last name you want), the customer's phone number or the customer's email address to find the customer for whom you want to create an Incident.

Figure 29: Quick Call

This entry area acts as a filter to find the correct customer. If the information you enter returns more than one customer, you will be shown a list of value from which you can choose the customer for whom you want to enter an Incident.

Notice that just the last name "Smith" is entered. When you hit enter, a list of employees whose Last Name is Smith will be displayed.



Employee Number	Name	Location	Department	Phone	Mail
K009246	Smith, Monique	-	Human Services	4123503496	Monique.Smith@AlleghenyCounty.US
K010331	Smith, Tracey	400 North Lexington Avenue	Human Services	4124732442	Tracey.Smith@AlleghenyCounty.US
T062171	Smith, Vernon	1 Smithfield Street	Human Services	4123505863	Vernon.Smith@AlleghenyCounty.US
T080493	Smith, Adrianne	1401 Forbes Avenue	Human Services	4123505892	Adrianne.Smith@AlleghenyCounty.US
T090344	Smith, Beverly	-	Human Services	4123502788	Beverly.Smith@AlleghenyCounty.US
T092667	Smith, Juanita	-	Human Services	4123501328	Juanita.Smith@AlleghenyCounty.US
T097071	Smith, Fred	-	Human Services	4124888557	Fred.Smith@AlleghenyCounty.US
T099232	Smithson, Earl	-	Human Services	4123502795	Earl.Smithson@AlleghenyCounty.US
T102183	Smith, Joanne	-	Human Services	4123507093	Joanne.Smith@AlleghenyCounty.US
T102531	Smith, Nancy	-	Human Services	4123504091	NancyLee.Smith@AlleghenyCounty.US

Figure 30: Select from Employees List

Note: Notice the magnifying glass icon, , you click this icon to select the record. Click the next to a name. Choose Nancy Smith. If she has open Incidents, they will be listed for you. This process allows you to query the customer if they are calling regarding an existing Incident, such as a Connectivity issue, as shown below. If they are calling about the existing Incident, you click the magnifying icon to select the existing Incident, if not, click the Log a New Call button. Try it both ways!

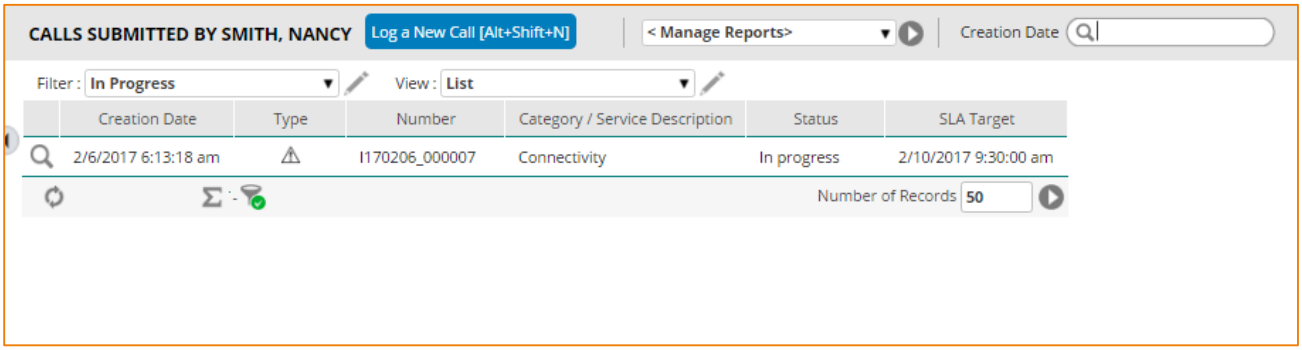


Figure 31: Employee Existing Calls

Nancy isn't calling about any of the existing calls, so click on the **Log a New Call** button.

The Create Incident screen is displayed.

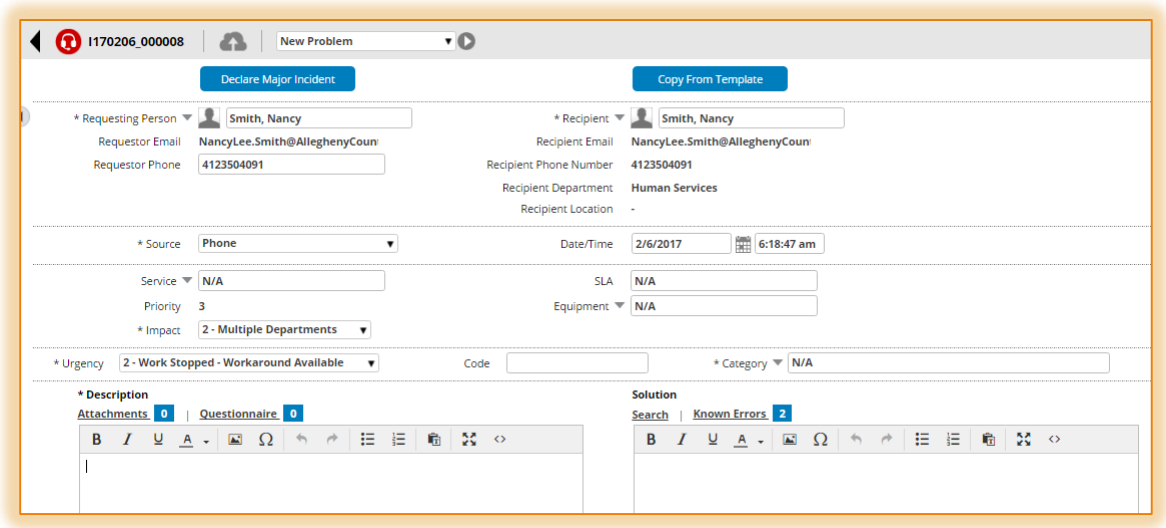


Figure 32: Log an Incident Screen - Top

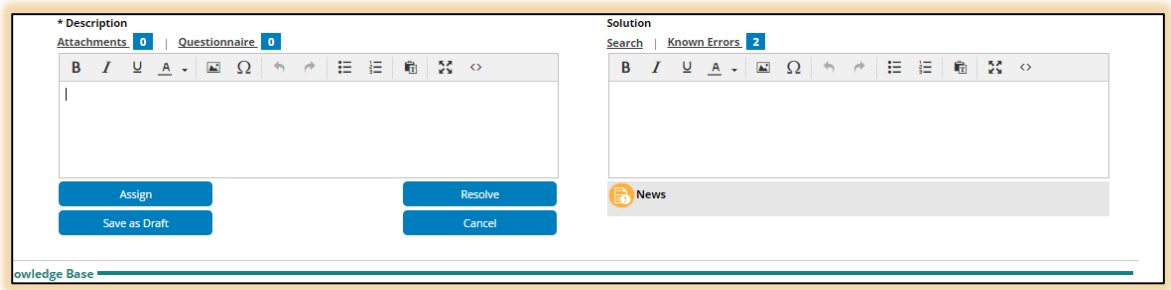


Figure 33: Log Incident Bottom of Screen

Categorize the Incident means to select the Category (subject) of the Incident that best describes the caller's issueChoose a category.

The example will choose **Incidents/DHS/Network/Incident**. Some categories will set the Impact automatically and some do not.

Verify Impact and verify Urgency selecting as appropriate for user's issue. See example below.

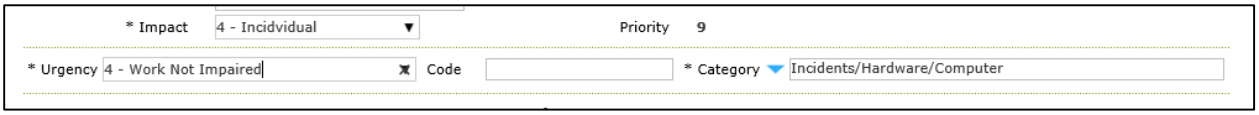


Figure 34: Zoom on Impact/Urgency

Next, you would want to enter a Description. Note you can make attachments to the description and you can copy screen shots directly into the Description. Also, if Questionnaires are attached, you would see the number listed in the screenshot below.

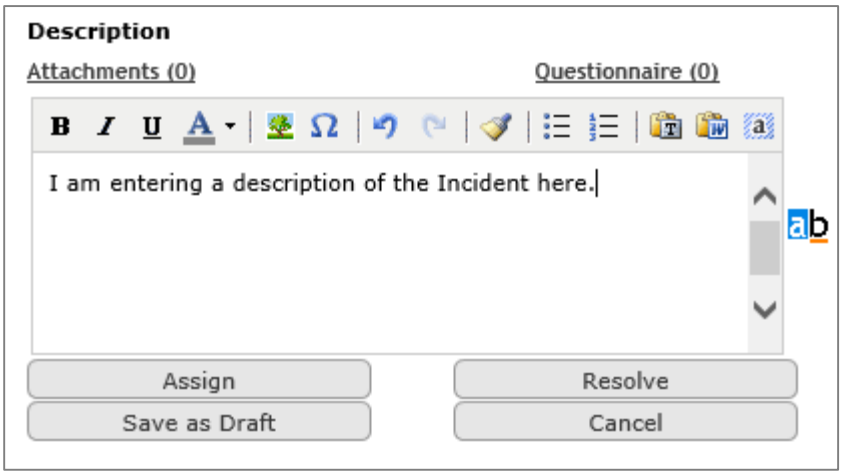


Figure 35: Entering a Description

Enter your description. It should be concise and not contain the client's name.

If you know the solution, you can enter it now and click Resolve to make this a First Call Resolution – FCR.

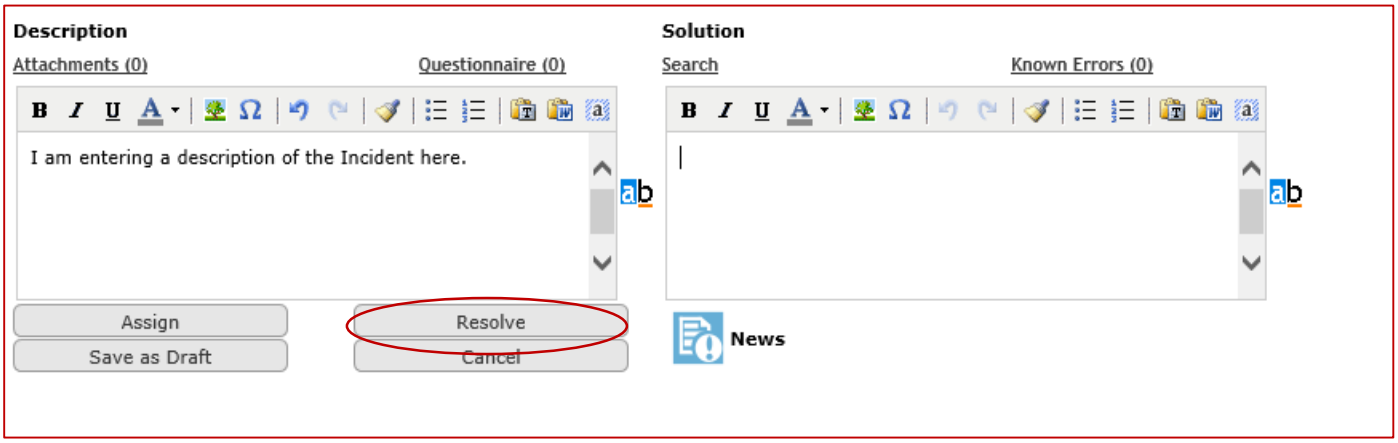


Figure 36: Description and Solution Entry Boxes

If it is not a First Call Resolution, you must choose what to do next.

ASSIGNING AN INCIDENT:

You can assign an Incident to the correct Staff/Group. Most categories have groups already associated and it is CBL POLICY not to choose a staff person, so that the next available person in the Group can grab the Incident or the Manager of the Group can assign the Incident.

Click Assign button: Assign . The following displays:

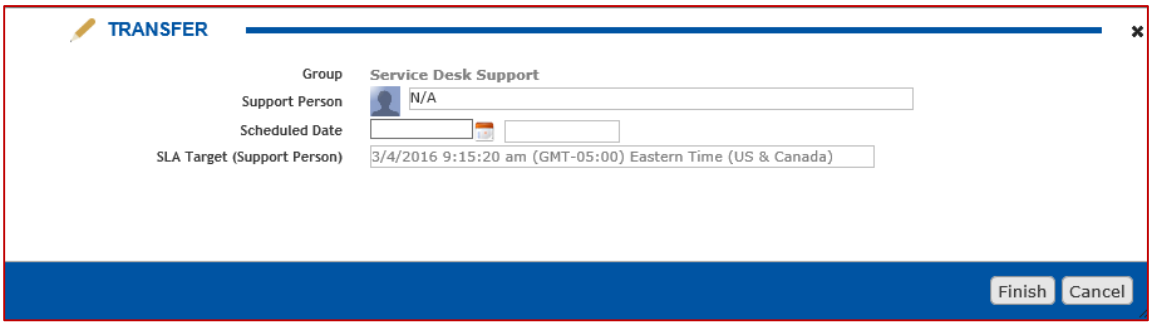


Figure 37: Assign Incident Screen

Group: If the category is associated with a Group, it will be automatically selected.

Support Person: Policy is not to choose at this stage.

Scheduled Date: Used if needing to set a schedule. For example, client is calling and indicates they won't be available until a date time or other reasons. You may leave blank.

SLA Target (Support Person) shows the date and time the SLA will breach.

SAVE AS DRAFT:

The Save As Draft feature should be used sparingly**. This saves the Incident in Draft mode and is only visible and accessible to the technician entering the Incident!!**

Save As Draft [Save as Draft] . Click the button to Save as a Draft Incident.

RESOLVE AN INCIDENT

To resolve an Incident you click the Resolve button: [Resolve] .

The Resolve Screen displays:

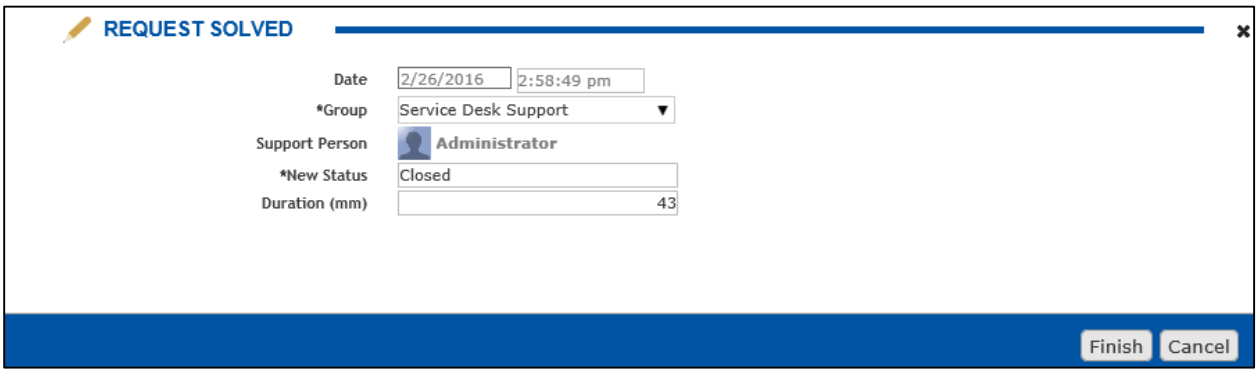


Figure 38: Resolve Incident Screen

You can choose to change the duration. Notice the New Status above is Closed, because we are in a First Call Resolution state in this example.

Click Finish to Close the Call.

Once the Incident is Assigned, Transferred, or Resolved. The following screen displays:

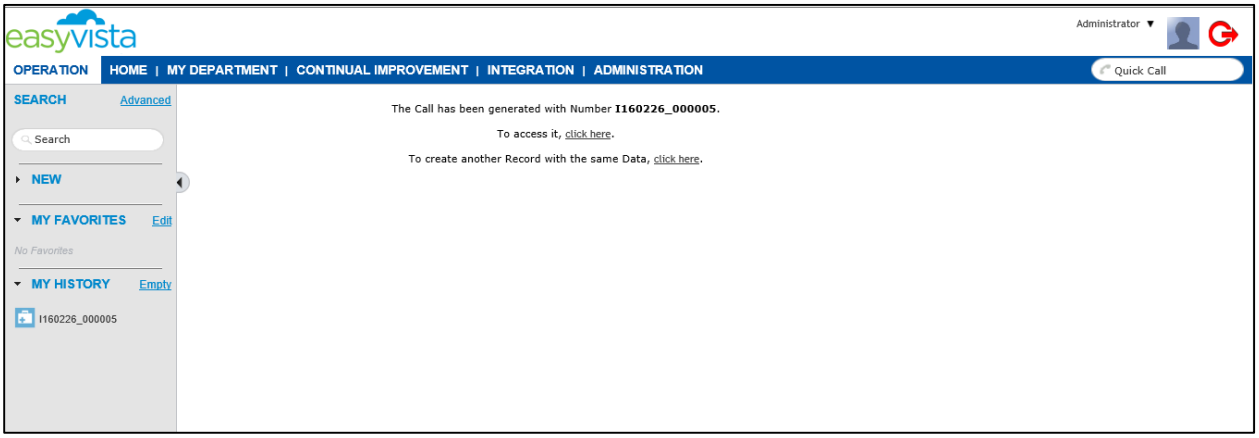


Figure 39: After Incident Saved Result

The screen displays as shown above providing the Incident Number and the ability to access the Incident or create another based on that Incident. This is useful when you are receiving many calls about the same issue.

Working an Incident assigned to you or your Group.

In EasyVista, you will note at the bottom of the screen are buttons as shown below.

THE NOTIFICATION BAR

Figure 40: Notification Bar - Bottom Screen

The notification bar is located in the lower zone of the interface. It is divided into several zones:

- **(1)** Ongoing actions/validations notifications, or Quick Dashboard (Note: It is based on the your profile):
    - Counters displaying the number of actions for *Operation* (Incidents for now, but later will include Service Requests, and Changes).
        - Checkbox: Actions assigned to you.
        - Bell: Alerts
        - People: Actions assigned to your Group(s).
- **(2)** Discussions notifications: Shows number of unread discussions.
- **(3)** News notifications: Messages published for your infornation. They are visible on the homepage of Operation.
- **(4)** Chat notifications : Counter displaying the number of unread chat sessions, icons to create a new chat session and availability status. We are not using Chat in EasyVista as CBL uses Skype for Business.

Notes: To mask the notification bar or redisplay it, click on the little pull-tab .

- To display the content of the related data, click on a counter.

You can also access your actions via the menu Operation>Actions>

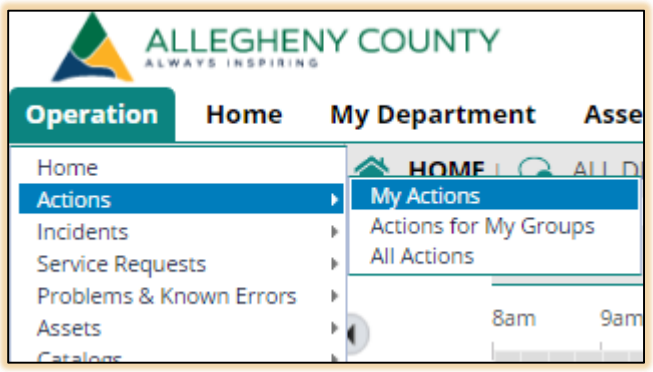


Figure 41: Operation > Actions

My Actions: Actions specifically assigned to you.

Actions for My Groups: Any Actions assigned to groups in which you are a member.

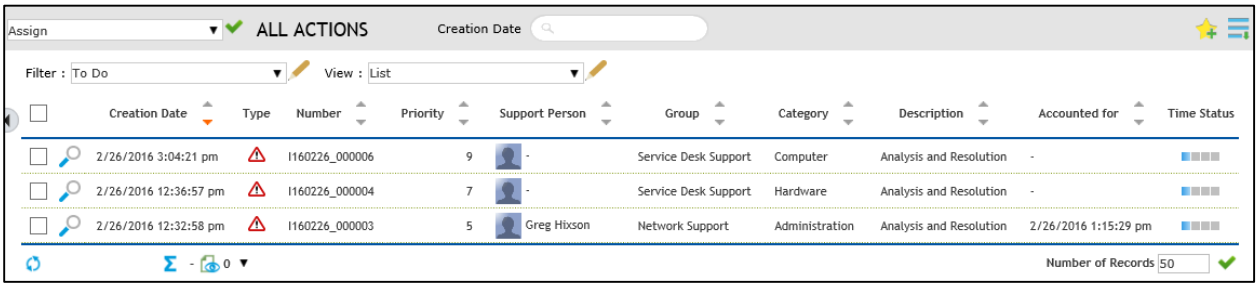


Figure 42: All Actions List

You can select an Individual record by clicking the Magnifying glass or select multiple records and choose from the Wizard (Menu) for a task to perform against the selected records.

Click on the magnifying glass to select a record. The Incident record displays, but we are interested in the Actions Area:

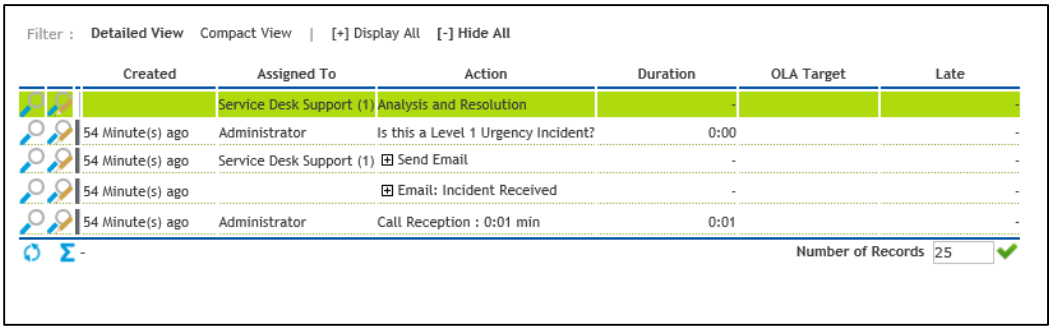


Figure 43: Actions Area

Click on the , magnifying glass/pencil icon to work the Action. This means you are taking ownership of the Action for the Incident to which it is related.

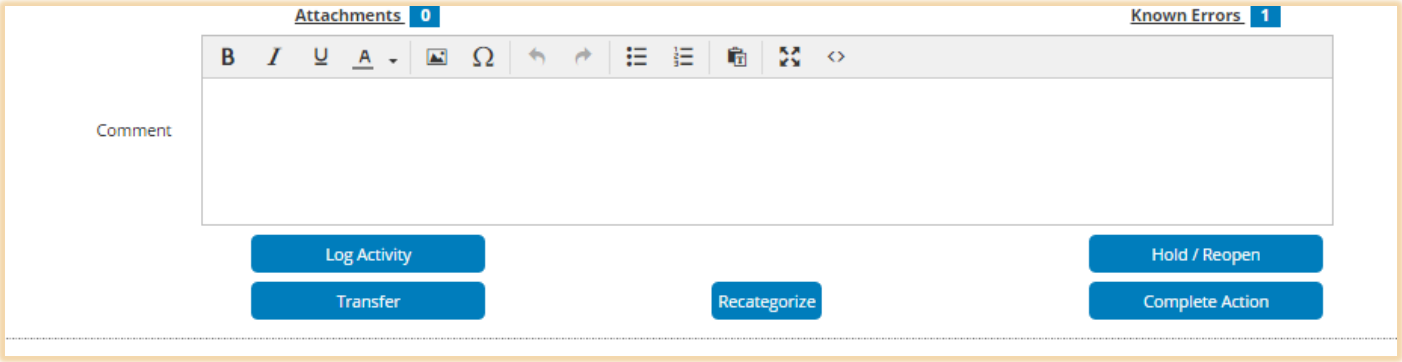


Figure 44: Work Action Area

You enter Text into the comment area and then Click Complete Action to complete that action. Notice that we have added a button called Recategorize which is also found in the Transfer menu, to make it easier for you, if all you need to do is Recategorize (Change the Category) of the Incident.

Once you click Complete Action, the following window is displayed:

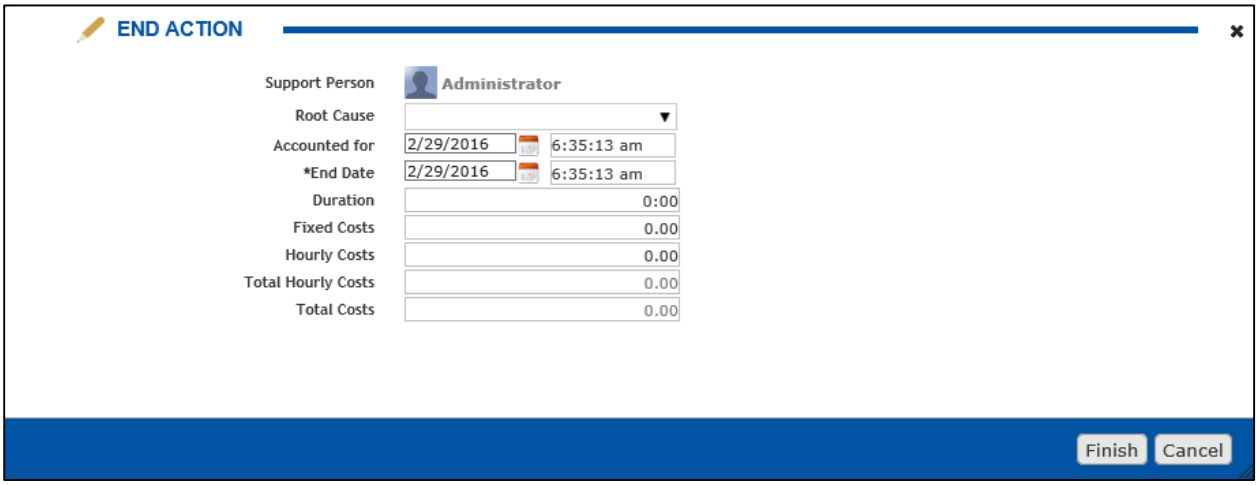


Figure 45: Complete Action - End Action Window

Populate the information, such as Root Cause and then Click Finish.

This Resolves the Incident and sets it to the User Validation Stage.

If you are not ready to resolve the Incident, you can Log Activity which is used to log information or tasks that were not included in the Workflow steps. You can also choose to Transfer the Incident or place the Incident on Hold/Reopen (Reopen means take off of hold here).

- Close wizard**: Is used to anticipate the incident's closure and to stop its process and then the related workflow (e.g.: The user found the solution by himself before the first Back Office action was started). The wizard will suggest deleting related actions. Note: You may reopen an incident that was closed early.**

USER APPROVAL FOR AN INCIDENT

Some incidents must get the customer's approval to be closed. The aim of this operation is to confirm that Incident has been completed and has solved the reported problem from the customer's perspective. The status **changed to Resolved.**

When Self Service goes live, the customer will access their Incidents to approve. The customer will also be able to indicate that the Incident is not resolved by a link in an email. If they do not respond, then the Incident will be closed automatically in three business day (72) hours.

NOTION OF PRIORITY: IMPACT AND URGENCY

The priority level of an incident is automatically calculated according to its impact and the user urgency. It will determine how quickly a support must solve the problem. The lower the value of the priority level is, the bigger is the priority given to the incident and the faster this one must be handled. The priority is calculated using the Priority reference table and the values assigned to each couple of impact/urgency.

- Impact**: Extent of penalization in the event of an incident that measures the blocking effect for the requestor. This is objective data defined in the incident catalogue and estimated according to the number of affected users, difficulties in their work, the nuisances which occur if the service type cannot be delivered (e.g.: A mail server problem is far more blocking than the failure of an individual printer).**

- Urgency**: Value measuring the blocking effect on the business activities of the requestor (the use of his/her equipment, the importance of the tasks he/she has to carry out). This is subjective data defined in the incident catalogue; it partly depends on the calling user.**

Note**: The critical level of the equipment and the VIP level of the recipient may be taken into account to define the priority level of the incident.**

EXAMPLE **An incident is reported the 10th of the month on the printer dedicated to Payroll department:**

- **The impact is considered important because the Pay service cannot use another printer.**
- **The urgency is considered low because the incident does not occur at the end of month.**
- **The priority attributed to the incident therefore has a low level.**

INCIDENT CONCEPTS TO UNDERSTAND

- **[Transfer]**: Is used to transfer the incident to a support Group when it cannot be solved immediately. It will launch the workflow that pilots the processing. The counters in the notification center will be updated.
  - **Latest possible Solution Date (Support Person)**: It is calculated as starting from the time of the call reception and applying the SLA commitment concluded between the IT department and the users.
  - **Support Person**: Used to assign the incident to a specific technician selected in the dropdown list of the support.
  - 4 possible Transfer actions:

- **Redirect to a group of the same level**: Redirects the action to another member of the same group, a group with the same level or a support member of a group with the same level. It is possible to prohibit transfer between specific groups.
- **Escalate to a group of a higher level**: Escalates the action to a group or a support member of higher qualifications. It is possible to limit the escalation to the level strictly higher (via the other parameters).
- **Redirect to a group of a lower level**: Forwards the action to a group of a lower level when the first assignment was not correct or after an unjustified escalation.
- **Requalify the topic**: Is used when the first Categorization of the incident was not related to the right topic. This transfer type allows changing the topic for the incident. This operation will launch a new workflow.

- **[Processing Call]**: Used to save the incident without transferring it. It is visible via the Incident Wizard> Processing in Progress. When you select one of these incidents, the Quick Call form is displayed.

If the incident is not saved during the call reception because of an error handling or a timeout, this one may be restored via the menu Incidents > Input Errors. When you select one of these incidents, the Quick Call form is displayed. These incidents may be deleted manually or automatically using a scheduled alert.

Input Errors were not assigned or saved before leaving the form. This also happens when Self Service users go to submit an Incident and never click Submit. You should keep an eye on input errors.

Service Requests and Changes

We are still in the process of writing the complete manuals. The concepts are the same for Incidents, Service Request, and Change.

The instructor will take you through creating and working Incidents, Service Requests, and Change Requests. You will submit a Change Idea as Service Desk members may receive emails that open an Incident for which you will need to categorize as a Change Request – Change Idea.

You will be provided with updated manuals that include documentation for all the modules we will be using.