

Remedy

Documentation mostly of value to Chemistry IT and Physics IT staff.

Standards and procedures for Chemistry IT and Physics IT staff

Expectations	Notes
"Cancel" (or "Turbo cancel") any non-ticket. Such as announcements from Craig Wiggers, junk emails, etc.	Helps keep Remedy reporting more accurate, naturally.
Flag every newly assigned ticket with "In Progress" as soon as you know about it.	All team members know you know about the ticket.
All tickets Subjects must all start with approved group name, depending on who the request is coming from. Name must be followed by hyphen with spaces before and after. In Physics, these are: <ul style="list-style-type: none">• Physics Instruct -• Physics Admin -• Physics Hand - In Chemistry, see full-page sheet with ~40 groups listed.	Useful for quick, unambiguous searching within Remedy. Necessary for certain Remedy reporting.
Clear email received checkbox as soon as you know about it.	All team members know you know about recent emails sent to the ticket.

Quick links

Log into Remedy (either)

- <http://remedy.cornell.edu/>
- <http://cornell.onbmc.com/>

Remedy's official "local" Admin Guide

- <http://www.it.cornell.edu/cms/services/remedy/howto/upload/Remedy-Local-Admin-Guide-2-4-2014-02-03.pdf>

Remedy reports

- [Remedy reports](#)

See also

- [Service categories in Remedy and desired ones](#)
- [Reported Source categories, Remedy](#)

TOC:

-
- [Standards and procedures for Chemistry IT and Physics IT staff](#)
 - [Quick links](#)
 - [Log into Remedy \(either\)](#)
 - [Remedy's official "local" Admin Guide](#)
 - [Remedy reports](#)
 - [Roger's Remedy book](#)
 - [Never BCC: to Remedy](#)
 - [Enter new calls](#)
 - [Accepting / editing Calls](#)
 - [Responding to / working on calls](#)
 - [Resolving calls](#)
 - [Review & Additional follow up](#)
 - [Convention started 4/9/15:](#)
 - [Tips, tricks, and gotchas](#)
 - [Setting up Remedy for the first time](#)
 - [If sending email that is to be integrated into Remedy \(as a support person\), obey these four rules](#)
 - [If you change the "Service" category on an existing ticket, ALWAYS hit No.](#)
 - [Create canned searches: Quickly see just one person's tickets](#)
 - [How to unlock closed tickets](#)
 - [Clear your cache](#)
 - [Remedy categories we can change as a group, and others we can't](#)
 - [See also](#)

- Gotchas if ticket passed from CIT back to ChemIT
 - The From: address in Remedy's email app. can change automatically
 - The Assigned Group (and Assignee) were changed
 - Notes from John Udall, at CIT (as FYI)
 - Adding survey requests when resolving a Remedy ticket
-

Roger's Remedy book

Never BCC: to Remedy

It won't know you're sending to ChemIT, and will send the request to the CU Help desk. Just don't.

- Yes, we know that if there is the correct ticket number in the subject line it should get processed correctly. But even knowing that, still don't do this. 😊

Enter new calls

1. In Remedy – Most complete, a bit slower, allows you to enter needed info in correct places, as well as sending the client a message with ticket number. This is good – we want clients to know their issue is being tracked.
2. From the ChemIT Request form – Provides faster initial entry – allows you to included needed info, as well as entering the client in the NetID field which will send them the call info. Details will be in the work info, and will still need to be edited in Remedy fields.
3. From your email or ChemIT – Please don't do this. It makes a call in the wrong name (yours or ChemIT!), thus sends the confirmation notification to the wrong email (again, you or ChemIT!), and the ticket still needs to be edited so it doesn't save time. And this process doesn't get the client in the loop.

Accepting / editing Calls

Be sure to look for and help edit / classify / assign calls throughout the day

1. Show "Assigned to all my groups" and "All open and updated by Email > All Priorities" periodically. To accept or assign a call:
 - a. In assigned group, begin typing chem – the select the assigned group of Chemistry (standard desktop response) or
 - b. Not really used, as of 3/1/16: Set the assigned group to Chemistry (L2) for calls which require engineering / development / advanced troubleshooting. This may also be changed after initial assignment when needed.
 - c. Select the assignee from the drop down list.
2. Check the "Unassigned", and see what you can help with, or if something needs quick attention from someone.
3. Open un-edited calls and
 - a. Set the Service category (Select a Service is the default).
 - i. [See our non-obvious use of categories page, please.](#)
 - b. No longer done: Set the product classification (works best if it will recognize a product name)
 - c. Select the Reported Source (email is default).
 - i. [If sourced from outside the office \(a conversation, drive-by, etc.\), codify it as "Chat".](#)
 - d. Assign to a group member if appropriate
 - e. SAVE changes

Responding to / working on calls

1. Email to client from within remedy using Function / Email System – works. Need to manually add additional cc: for each message.
2. Email to client from ChemIT or your NetID in Outlook – Works well – Reply to all, INCLUDING ChemIT & Incident #. ChemIT must be a visible recipient, and not a BCC.
 - a. Note: Remedy will mis-classify this as "Customer Communication", rather than system email.
3. Make additional notes about work done, details discovered, etc in Work Detail tab – you can make many entries, which can help track progress, and help anyone else who works on this issue.

Resolving calls

1. Be sure service & prod cat is set
2. Click Resolve
 - a. Enter final work done, result, etc in Resolution (This will go to the client)
 - Ex. Hey there! It's been a few days since we've heard from you and we're concerned. Do you still need some help? If you do, reply with any additional info. If not, no problem - just ignore this email and we'll consider your issue fixed. -YourName
 - b. Set the status reason (Usually No Further Action, may be others)
 - c. Add any additional work info in Notes
 - d. SAVE

Review & Additional follow up

1. Check your calls – "Assigned to me", and "All open and updated by email" daily.
 - a. Close out things you are done with as soon as possible – this will improve our reporting metric for how long things are open.
 - b. Re-assign or ask for help on things that are "stuck"

- c. Set status for calls that are waiting for client response to "Pending" (stops the service response ticker?), and back to in progress when it is.

Look for calls marked "Email update" – May include open or resolved calls. This indicates that new email has been received which may need action. Read, and clear the "Updated by Email" checkbox. Save. Re-open resolved tickets if necessary.

Convention started 4/9/15:

Once a month, ask yourself these questions of ticket a month old or older:

- Have they had any recent action? Are they really still something we can do anything about? Do we know what? Can you make a step forward? Or are they not a ticket, and perhaps a project?
- Please open and take a look at your oldest, dusty calls (and maybe some not so old as well) in Remedy and:
 - Think about what, if any action can be taken
 - Add a note in "work detail" listing the next action needed, and by who.
 - Set the Status (In progress, pending, etc)
 - Set the status reason field based on the action
 - And try to close at least one of them.

Tips, tricks, and gotchas

Setting up Remedy for the first time

For more functionality than the default view:

1. Click the "Applications" tab on the left side of the screen.
2. Under "Incident Management", select "Incident Management Console." Here you can search, create new incidents, etc.
3. To keep this as your default view:
 - a. Select "My Profile" on the left taskbar.
 - b. Under "Quick Links", select "Application Preferences."
 - c. Set the default homepage to "Incident Management Console."

If sending email that is to be integrated into Remedy (as a support person), obey these four rules

1. You may Bcc: CRCF.
 - a. Since you can't Bcc: from within Remedy's email, this is often the reason you will want to do this in the first place. :-)
2. Do NOT Bcc: ChemIT.
 - a. See above for why.
3. You must include the relevant ticket number in the Subject line
 - a. Done so message is automatically associated within Remedy
 - b. Usually done at the beginning of the Subject line.
4. Send as ChemIT.
 - a. Done so if a reply comes, it also goes to Remedy. If sent as an individual, reply doesn't automatically go to Remedy.

If you change the "Service" category on an existing ticket, ALWAYS hit No.

Changing a "Service" category will prompt you to ask about keeping the existing service. If you hit Yes, the ticket gets two services attached to it. And then the ticket will act more weird than normal in Remedy.

Create canned searches: Quickly see just one person's tickets

In the "Filter by" pull-down option, create your own "My searches". Useful if you want to see just one person's tickets, for example:

('Assigned Group' = "Chemistry" OR 'Assigned Group' = "Physics" OR 'Assigned Group' = "Chemistry (L2)") AND ('Status' = "Pending" OR 'Status' = "Assigned" OR 'Status' = "In Progress") AND 'Assignee' = "Oliver B Habicht"

To create, click on the magnifying glass ("Manage My Filters" stated when mouse-hovering over it). Click on the "New" button, give it a name, and enter in a search, such as the one above.

How to unlock closed tickets

- In our group, Michael Hint has the authority to unlock closed tickets.
- If Michael is not available, email CIT's TSP (Tech Support Provider Support ; Level 2), <tsphelp@cornell.edu>.

Clear your cache

Per CU's Remedy Support Team, 9/27/13: If you have issue with Remedy this morning, there is a good chance that the problem can be resolved by clearing your browser cache. Instructions for how to do this in the major browsers can be found at:

<http://www.wikihow.com/Clear-Your-Browser's-Cache>

There is no need to clear your browsing history, cookies, or other elements. If after clearing the browser cache, you still cannot log in, please email remedy-admin@cornell.edu for assistance.

Remedy categories we can change as a group, and others we can't

Per email to Oliver, from John Curatolo, 2/26/2014:

- We can request to modify **ProdCats**.
- We cannot add/ modify OpCats.

See also

- [Service categories in Remedy and desired ones](#)

Gotchas if ticket passed from CIT back to ChemIT

Happens when calls passed back-and-forth with CIT. For instance, with the ATC. Oliver sent one of our tickets to ATC (CIT), INC000000895224. When they did their work, Oliver went to email the client from within the ticket, in Remedy, and he noticed:

The From: address in Remedy's email app. can change automatically

It //defaulted// to a From: address of the ATC, not ChemIT. Oliver fortunately noticed this and changed the From: address back to ChemIT before sending the email. Don't forget to watch for this. :-)

The Assigned Group (and Assignee) were changed

These fields were set to Course Technologies (John S Udall). Oliver noticed ticket not showing up in his queue. But he's leaving it as-is for this ticket because next action still with John Udall.

Notes from John Udall, at CIT (as FYI)

9/5/13

When you change ownership of a ticket to another "Assigned Group" in Remedy, it can (and often does) change the from/reply-to address.

There are a couple of options for working with this functionality --

1.) If you assign a ticket to one of the teams in Academic Technologies (for example Course Technologies), then you can request that they re-assign the ticket back to ChemIT (Is that -- Assigned Group = Cornell University - IT > A&S > Chemistry ?), once the ticket is complete. Then you can close the loop with the customer.

2.) Where things get tricky is if both groups (Academic Technologies, and ChemIT) are communicating with the customer from within the ticket via Remedy Email while the ticket is being worked. (This is the scenario we are seeing with INC000000895224.) When this occurs, we each have to be careful to look at the from/reply-to address when emailing from within Remedy. The from/reply-to address will depend on which group owns the ticket at the time. Functionally, it doesn't matter, because it all goes to Remedy, and is keyed off the Incident number. But the goal, I think, is to avoid confusing the customer.

I don't think that this is inconsistent with what you were saying in your email & Remedy tips in Confluence. It just calls out that, a.) if you want Academic Technologies to re-assign tickets back to ChemIT in Remedy when we are done with them, so that you can follow-up, we can do that. But you will have to ask us to do that each time / for each ticket. And b.) if we are going back-and-forth with a customer, then we both need to be careful about where the emails are saying that they are coming from.

One thing that I haven't tested is who can reply to a ticket via email, and expect to have response forwarded to the customer automatically by Remedy. I think that also depends on which person is assigned to the ticket at the time. This might be worth testing at some point.

It's worth mentioning that Academic Technologies has only been using Remedy since January, 2013. We are still shaking out our business processes around its use. Some units of CIT have been using Remedy much longer, and may have other business processes in place. So, I'm not sure you can generalize beyond tips about the behavior of the Remedy application itself (which in some cases, may have different configurations, and therefore different behaviors, from group to group).

Adding survey requests when resolving a Remedy ticket

Per Benoit McNicoll (6/18/14):

The local Admin (John Curatolo currently in A&S) must configure survey in Remedy:

- Go to Page 14 of your local admin guide (<http://www.it.cornell.edu/cms/services/remedy/howto/upload/Remedy-Local-Admin-Guide-2-4-2014-02-03.pdf>).

We in ChemIT/ PhysIT then must do some work:

- Bottom of Page 15 talked about the embedded fields you can include in your Qualtrics survey. All the fields are passed by default, it is just a matter of capturing it on your survey.

