



Remedy Help Desk 5.5 Overview and Definitions

Overview

Remedy Help Desk 5.5 is a forms-based case management system. To use it effectively, you must select the form you wish to use from the Console, such as the Help Desk Cases form. The Console acts as a “portal” to the application. Once the Console is opened, cases assigned to your Group are automatically displayed. The Console includes a Bulletin Board, used to display important system or service information.

There are two consoles that are part of Remedy Help Desk 5.5 and included in the May 2004 implementation:

- Support Console for HelpSU consultants, labeled IT Service Management Console
- Management Console (formerly referred to as ‘Queue Managers’)

A future possibility is to implement the Requester Console for clients to search for solutions (via a knowledge base).

To get help using Remedy Help Desk 5.5, please submit a HelpSU request with the Request Category of *Application-HelpSU*. Additionally, see the *HelpSU for Consultants* section on the HelpSU site: <http://www.stanford.edu/dept/itss/services/helpsu/consultants.html> for the software download as well as step-by-step instructions to use Remedy Help Desk 5.5 (called job aids) and other information useful to Remedy users.

Definitions of Commonly Used Terms

Category, Type, Item (CTI)

- **Category** indicates the broad request grouping.
- **Type** indicates the narrower request grouping; Type options are based on the Category selected.
- **Item** indicates the most specific request group; Item options are based on the Type selected. When creating a case for a Group other than your own, always indicate an Item of *General* which will enable the HelpSU individual to select the correct Item.

Group

The group assigned to work on a case. The CTI are mapped to this field.

Individual

The Support (HelpSU) Consultant associated with a case.

Login

The SUNet ID of the requester, or client.

Name

The requester’s name; field format is Last name, First name. It is case sensitive. Example:

Stanford, Leland

NOT stanford, leland

[See the Searching job aid for tips on searching in the Name field.]

Notifications (to Clients)

An automatic notification is sent to a client from the HelpSU system when a HelpSU online request form is submitted. All other notifications (e.g., when a case is Resolved) must be manually done (see Reminders).

Reminders

Reminders is a feature that enables emails to be sent to clients. Additionally, reminders enables you to set a reminder for when the case should stop its Pending status by sending yourself an email.

Service

Indicates the problem category selected by the requester when submitting an online HelpSU request.

Status

Indicates the current disposition of a case. Options are:

- New = case created
- Assigned = case assigned to Group or Individual
- Work in Progress = case being actively worked
- Pending = case not actively being worked due to a specific reason; see Pending field to specify reason*
- Resolved = case resolved; no further work to be done and client aware of resolution
- Closed = client acknowledged case was resolved, OR 15 days have passed since case marked Resolved.

*Pending field options are:

- Parts = case is pending the receipt of specific equipment
- Requester Information = case is pending the requester providing needed information
- Problem = case is part of a larger problem, such as one logged via Code & Problem Tracker

Work Log

The Work Log field is a required field on a case form. The Work Log field is where all updates about that case are to be entered, so that anyone reviewing the case would understand the status of the case, what actions had been taken to date, and what is planned in the future if the case is not currently resolved. It is the diary of the case.

Function Key Commands

F1 = Remedy Help

F2 = Open New Case Form

F3 = Start New Search

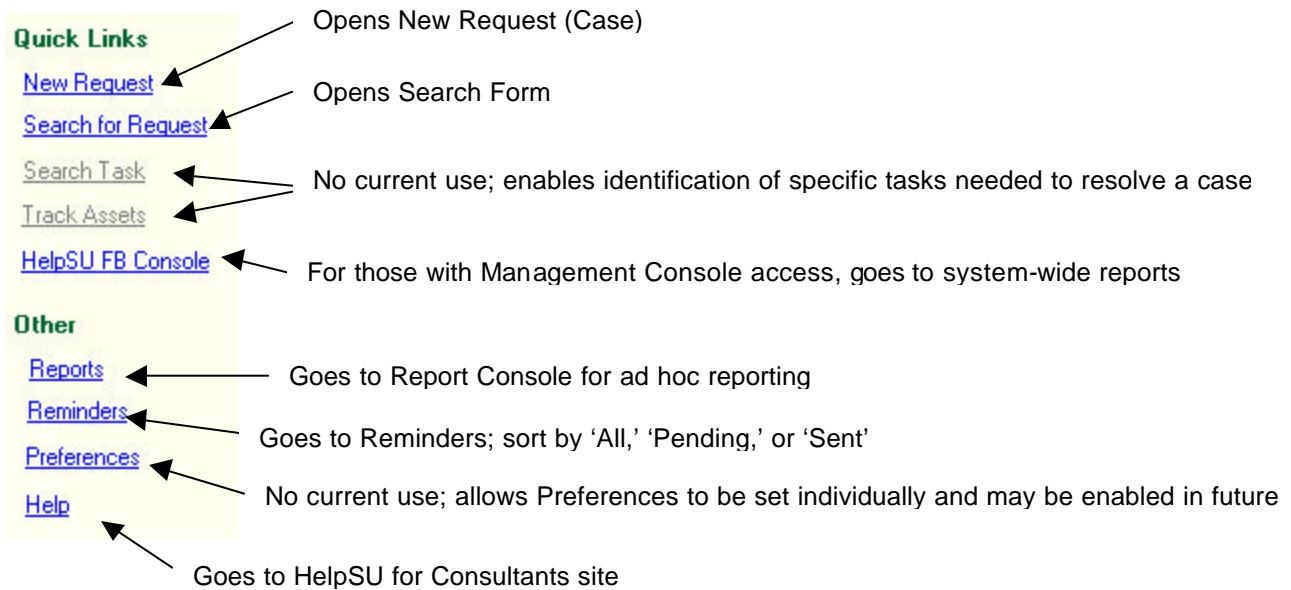
F4 = [has no meaning]

F5 = Refresh*

*NOTE: Help Desk 5.5 does not automatically refresh and you cannot set it to do so.

- To refresh your Console, press the Refresh button under the Assigned Requests table. Or, right click on the Assigned Requests table and select Refresh.
- To refresh a search form when using it, press your F5 function key.

Main Console Functions



Comparison of Terms from Previous Version of Remedy to Remedy Help Desk 5.5 Terms

Previous Term	Help Desk 5.5 New Term
HelpSU Ticket, Request	Help Desk Case, Case
Email Notification	Reminders
HelpSU Consultant	HelpSU Individual
Problem Category, Description	Category, Type, Item
Problem Description	Description
School, Department, Location	Region, Site, Department
Service Group	Group
Severity	[no field for Severity; Request Impact is the closest field to indicating a severity level]
Status: Open	Status: New
Status: Assigned	Status: Assigned to Individual or to Group
Status: Working	Status: Work in Progress
Status: Hold	Status: Pending
Status: Fixed	Status: Resolved
Status: Closed	Status: Closed
Submission Method	Source
[SUNet ID; no field in Remedy]	Login+ [for SUNet ID; all directory info autofills]
User Problem Category and Operating System	User Request Category, Request Type, Operating System