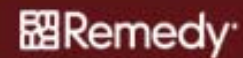


REMEDY®

# Action Request System

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## Using the Remedy AR System at NC State

**NC State University**  
**Office of Information Technology**  
*Revised: 31 March 2008*

## Using the Remedy AR System at NC State

### Training Notes

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This document is maintained on the Web at:

<http://remedy.ncsu.edu/training/>

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#### 1.0 Introduction

In May 1999, the Remedy AR System was officially released at NC State as a solution to customer service call tracking and resolution. Through the efforts of the Remedy Implementation team, the old call tracking system data and functionality was transferred to the Remedy system to allow for a seamless transition from the old tracking system to Remedy. This course was originally designed to transition a current support staff member into the Remedy system, but works well to guide a new user through the software and workflow philosophy. Although this course is based on the workflow and policies of the NC State Help Desk, it should be applicable to all support organizations here at NC State.

#### 2.0 How to get the Remedy software

The Remedy client software currently recommended for use at NC State is **Remedy AR User 5.01** for Windows XP and **Remedy AR User 7.1.01** for Windows Vista. (The current version of Remedy available on their website is newer than what we are currently using. While this version will work with our server here at NC State, some of the functionality available in the newer version will not function correctly.) The software only runs natively under Windows.

If you have access to a Netware server on campus, and/or run your applications through a Novell Application Launcher, you should have the Remedy AR User program available if your department is involved in the Remedy project. This is recommended if possible, since major client changes can be made over a wider area if a shared application is used instead of multiple local installs.

However, if you are running a Windows machine that does not have access to a shared server environment, you will have to install the software locally. You can download the AR User software locally at:

<http://remedy.ncsu.edu/project/download.html>

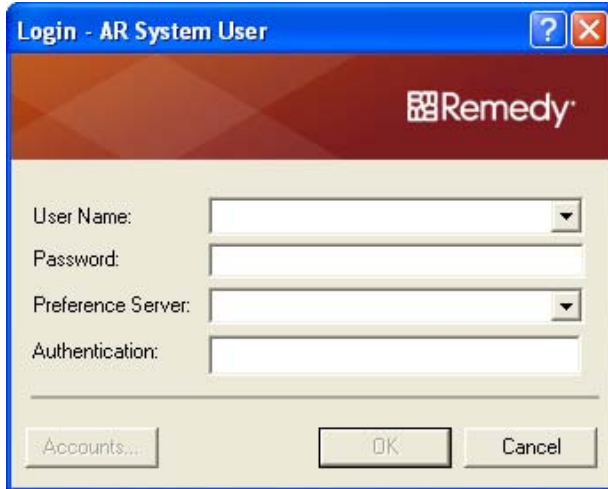
Running Remedy on other platforms (such as Macintosh or other UNIX-based operating systems) is possible through use of the Remedy Web client, which is available at:

<http://remedy.ncsu.edu/web>

The Remedy Web client was written at NC State, and does not have all of the functionality of the Windows-based client. For the purposes of this training, the Windows client will be used.

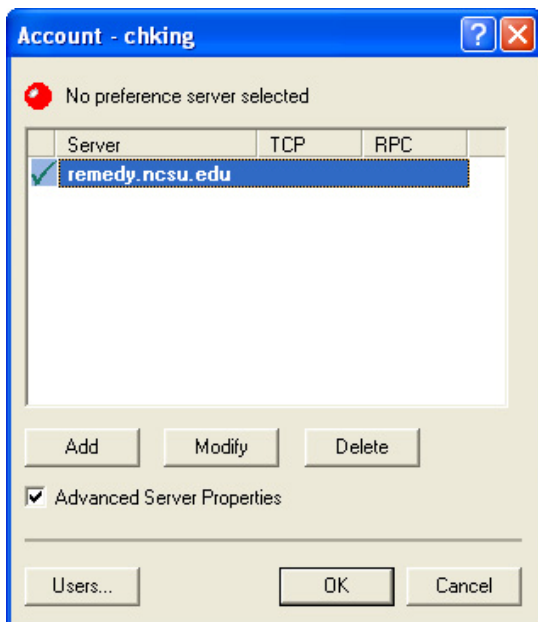
#### 3.0 Running Remedy for the first time

After Remedy is running, you should get a login window:



Your login ID should be the same as your Unity login ID, but your password is initially a system default, which should be given to you beforehand. If you do not have a Remedy login ID, your instructor can give you a temporary ID for the purposes of the class.

If you cannot log in, your server configuration may not be set up properly. To verify this, click on **Accounts...** to verify that a server has been configured for your installation.



If you do not have a server listed, click on Add, and add the server “remedy.ncsu.edu” in the field given.

Once you have successfully logged in to Remedy, you must open a form.

### 3.1 Opening forms

Opening a form is your first step in doing anything with Remedy. Access to these **forms** lets you change information within Remedy, including User information (that's you as the support staff – customer information is maintained outside of Remedy) and Calls. The first task we will perform is a User search, so you can verify and change your User information.

This task can be begun either by clicking on the Open button, or by selecting Open from the File menu:



### 3.2 The User record

This action brings up the Open window. From this window, select the User Form:

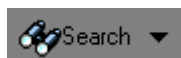


and click Search. The User task is a way to search through and manipulate information about the support staff at NC State. It is a Remedy **view** linked to a **form** (formerly called a **schema** in previous Remedy versions), which is in turn linked to a database. Changing information in this view changes the information in the database, once updated. A user can change all of the fields of information about themselves, except:

- **Login Name**
- **License Type**
- **Default Workgroup**
- Group List

Please note that all fields in **bold** type are **required fields**. You cannot leave a required field blank, but there should already be information in all required fields when you first look at any information in the User form.

Search for your own User record. Enter your Login Name (the same login you used to enter Remedy) and click on the Search button, or simply click on the Find Me button:



The matching User record should come up. Feel free to change information about yourself, but keep in mind that the information must be correct for Remedy to function properly. Also, if you are logged in with a class ID, please do not change information

during class. If multiple users attempt to change this information at the same time, you will get some very interesting error messages.

Two items of note in your User record are the Default Notify Mechanism and the Availability fields. At times, you will need to be notified of changing conditions with regard to your Remedy workgroup or calls you are responsible for. These changes, such as becoming the owner of a call, a call you own becoming Active, or a call in your workgroup going Dormant after a period of inactivity, are called Notifications, and the Remedy notification server sends out these notifications based on criteria set up for each workgroup. While it is usually your workgroup manager who determines which of these notifications you receive, the Default Notify Mechanism determines how you get these messages. The default is via email, and the notifications are sent to the email address listed in your User record. The other option is by using Remedy Alert (shown as Notifier on the form). Alert is a standalone program that runs on your Windows workstation until a notification is sent out. Then, it responds based on your configuration – it can beep, display a message, play a sound, or one of many things to get your attention. Alert is installed separate from the standard Remedy AR User install, and is not available with the Remedy Web client.

You should definitely change the password in your User record from the initial default. Your Remedy password is initially set to a system default, making security a serious issue. The first thing you should do with Remedy is to change your password. When changing your password (within Remedy or otherwise), you should try and meet the following criteria:

- 6-8 characters long (long passwords are hard to remember)
- a combination of letters and numbers or a punctuation mark
- a mixture of upper and lower case letters

Your password should not be:

- blank
- the names of anyone in your family (including pets)
- birthdays or anniversaries
- home or office phone number
- license plate or drivers license number
- your login ID or password on another computer account
- an unusual word you found in a dictionary (English or otherwise)

Once you've decided on a password, simply type your new password in the Password field on your User record. It will not appear as typed, but will show up as a line of asterisks. (For example, the password "password" would look like "\*\*\*\*\*".) Click the Save button:



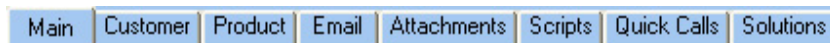
and your password will immediately go into effect. You will then have to log in to Remedy again (using the **Tools...** menu **Login...** option) so that your session will use your new password.

#### 4.0 Using Remedy to log calls

Once you have your User record in order, you can begin using Remedy to log calls as they come to your organization. The form to be used to log and review calls in Remedy is the **Calls** form. As with User, be sure to select the “Find” task:



Once the Calls form is up, you are ready to log calls. However, let’s first go over the various parts of the form. As you can see, the form is divided up into eight parts called **pages**:



These pages keep different pieces of information separate, for ease of use. In some cases, these pages connect different databases on the server together in the Remedy Calls form. (Some workgroups on campus may see differing pages, based on their support needs.)

#### 4.1 The Main Page

The Main page displays the most commonly used information of the Remedy call. This page is divided into two main sections: **Customer** and **Call**.

The Customer section allows you, the consultant, to look up information about the customer in question, and associate them to the call you are logging. You can search for your client in many ways using this section. Although searching by Login ID is the easiest and most common way to search for information, you can also search by First or Last Name, Phone Number, or even OUC Code, or parts thereof. For example, if I was looking for Andy Fishcorn, but I didn’t know if he spelled Fishcorn with one “s” or two, I could type “Fis” in the Last Name box, hit Enter (or click on Lookup), and Remedy would find all customers with “fis” in their Last Name (such as “Fisher” or “Elfish”). Please note that unlike our old tracking system, you cannot alter information in the Remedy Customer section, or enter anyone who does not appear. This data comes from a variety of sources, and is entered into the system in a read-only format. If a Customer’s information is incorrect, they will have to change their information as seen by the University. Remedy **solution** #849 explains this process:

<http://help.ncsu.edu/solutions/all/849.php>

As you learn about Solutions in section 4.7, you will know how to look up and use this solution within Remedy. Also note that there is a “Find Calls” button that allows you to search for all calls associated with this customer.

The Call section is the section you'll look at the most as a support staff member. It contains all of the information necessary for a good call – that is, a call that informs other consultants about the problem and the situation, both now and in the future, if need be. Much of this information is set by Remedy, but you will have to enter others depending on the situation. These fields and entries are explained below.

**Call ID:** Every Remedy call is given a unique Call ID when it is created, so it can be easily indexed and referred to. This is created and entered by Remedy when the call is first created, and does not change.

**Problem Description:** This line of information is analogous to the “Subject” line in an email message. The Problem Description is a brief summary of the problem at hand. When consultants are browsing through their calls, they will only see the Problem Description, so make it as descriptive as possible to save time for every one. The Problem Description field is a **character field**, meaning that it can only contain 120 characters.

**Text:** This is the main body of the call – the section where all pertinent information is kept. Any information not already shown in the Customer section or the Problem Description needs to be in this field. Also, notes between consultants working on a call can be found in here as well (although some users prefer to use the History field for this, since it is not visible to clients). Any entries made into the Text field are time-stamped, and show the Remedy user who entered the text. Some workgroups are *exposed* workgroups, which means that the Text field is published via the Web when a client checks the status of their call. Keep this in mind when entering data into the Text field – keep the content relevant and informative. Even if your organization does not publish their calls, the call may be moved into a workgroup that does.

**Status/Priority/Origin/Impact:** These fields are **drop-down menus** containing information that is usually consistent between calls. Status shows the position of the call in the general call tracking workflow. Status goes from *New* (a call that has just been created) to *Assigned* (a call that has been placed into a Remedy **workgroup**) to *Owned* (a call that a consultant has taken or been given responsibility for) to *Closed or Solved* (a call that has been resolved). In some cases, Remedy updates the Status, but you may have to do this manually, depending on how your organization chooses to handle calls. Priority, Origin, and Impact all are dependant on the problem, and how your organization handles calls. Remedy assigns these fields default values, but you may change them as you like. The values for these menus are:

<u>Status</u>	<u>Priority</u>	<u>Origin</u>	<u>Impact</u>
New	Low	Phone	Individual
Assigned	Medium	FAX	Group
Owned	High	V-Mail	Site
Active	Critical	E-Mail	Enterprise

Defect  
Waiting  
Closed  
Solved

Emergency

Project  
Self  
Walk Up  
WWW  
Lab  
IM

**History:** The History field is where Remedy keeps track of changes made to a call. This field is updated any time a field in the Remedy call changes, such as information added to the Text field, if someone assumed ownership of the call, or even if the Status changes. When a call is first created, the initial field values for the call are stored in the History field, as well. As mentioned earlier, some users prefer to leave dialogue between support staff members in the History field, since the History field cannot be seen from the web interface to Remedy. Like the Text field, the History field entries are time-stamped, and show the Remedy user who initiated the change.

**Action:** The Action field is a character field (120 chars max.) for consultants to put any notes about the status of the call. Common entries include “Waiting for more information”, “Referred customer to local tech support”, or even “Call closed due to lack of response from client”. It is important to realize that Remedy customers can check information about their calls via a web page. This web page shows the contents of the Action field, so anything entered into this field should be screened for content.

**Workgroup:** One of the main reasons we use a call tracking system is so that certain groups on campus can see their own calls, and exchange calls through one common database. These calls are arranged via **workgroups**, which are groups of individuals within common consulting areas. Workgroups include OIT (the general OIT workgroup), DELTA, CALS, DESIGN, and other departmental or organizational workgroups to make call sorting and exchange easier. There are even TEST and TRASH workgroups for experimentation or disposal of unwanted calls. Please move spam email calls to the TRASH workgroup as opposed to leaving them in your workgroup. Calls in the TRASH workgroup will be removed from the system after 21 days. When you first create a call, this field is set to your Default Workgroup from the User form.

**Owner:** Although calls are initially separated by workgroup, we can further separate them from that workgroup by assigning them to an **owner**. When a call has an owner, the status is changed to Owned, which takes the call out of the general workgroup searches. So, only the owner of that call will see, and therefore try to resolve, that particular problem. A call can be assigned an owner by the owner themselves, or anyone else using Remedy. If you have been assigned ownership of a call, you will be notified by the Notification method listed in the User form.

**Agent:** The **Agent** of a call is the Remedy user who first created the call. This is assigned by Remedy, and cannot be changed. One thing to note is that the agent “Demo” usually denotes a call created by an email message or our online problem report form, and is not the name of an actual person.

**Time Spent:** For those organizations that like to see how long problem resolution takes, the **Time Spent** field can be used. Clicking on the Start button starts the timer, and the red Stop button stops it.

A rectangular button with a light gray background and a thin black border. The word "Start" is centered in a black, sans-serif font.A rectangular button with a light gray background and a thin black border. The word "Stop" is centered in a red, sans-serif font.

Please note that you can also directly edit this field. Press Return in the **Time Spent** field to display the edit dialog box.

**Create-date/Modified-date/Resolved-date/Last-modified-by:** These fields are automatically filled in by Remedy, and reflect the date of call creation, call modification, call resolution (status set to Closed or Solved), and the Remedy ID of the user who last modified the call. These cannot be changed. They can, however, be rewritten – if a call is Closed, then set to Active, then Closed again, the Resolved-date will be rewritten to reflect the most recent resolution. The History field will still show the old time, if it is needed later.

**Next Contact:** When a Remedy call is in the queue, it responds to certain **escalations**, such as dormant calls and no call owners. However, a Remedy administrator sets these up on the server. If you as the consultant would like to be reminded of a call, you can set a time for Remedy to notify you in the **Next Contact** field. When the time and date you put in this field arrives, Remedy will notify the owner of the call by the Default Notify Mechanism set in the User form.

**New:** This button is the first step in creating a Remedy call. Clicking on the **New** button causes several **active links** to activate within Remedy, such as generating a unique Call ID, placing the call in the appropriate workgroup, and setting default values for many of the required fields in the Call section.

**Update:** Information entered into Remedy is not synchronized with the main database immediately. Once you have reached a point where you would like the information you have entered into your call to be entered into the central database, you can click the **Update** button, and your Remedy client will send that information to the Remedy server, which will then in turn update the database for everyone to access. Note that this is the same as clicking the “Save” button.

**Finish:** One “feature” about Remedy is that it opens a lot of windows during the course of call resolution. The **Finish** button has the same functionality as Update, but it also closes the window you are working on, making desktop housekeeping a

bit easier. Keep in mind that Finish does not Close the call status-wise – it simply updates the call and removes the window from your desktop.

**Print:** The Print button prints pertinent information about the active call to your local printer. This is not a screenshot, however – it only prints out the text content of certain fields.

**Search for Owned Calls:** This button is the first of four buttons that you will use when searching your queues for calls to resolve. This button will display all calls that have your Remedy ID as the Owner that are not set to status Closed or Solved. If another Remedy ID is entered into the Owner field, then that account's owned calls appear instead.

**Search Default Workgroup:** Probably the most commonly-used button, this button displays all calls in your Default Workgroup set to the statuses New, Assigned, Active, Defect and Waiting. For most organizations, this constitutes the bulk of all calls needing resolution.


**Search All My Workgroups:** Some organizations have multiple workgroups, and some people choose to be members of more than one workgroup. This button displays all calls in every workgroup of which you are a member (as listed in the User form) set to the statuses New, Assigned, Active, Defect and Waiting.

**Search Selected Workgroup:** Occasionally, it is necessary to browse a workgroup that you do not belong to. By selecting the workgroup from the drop-down menu under Workgroup and hitting this button, you can display the New, Assigned, Active, Defect and Waiting calls in that workgroup.

**A note about searching:** There are other search mechanisms in place for folks who wish to do more in-depth searches. For a quick listing, go to the Utils... menu and select the Search option. More information about advanced searches will be covered in the [Advanced Remedy Topics](#) course.

## 4.2 The Customer Page

The Customer Page is fairly self-explanatory – it contains all of the available information about a customer, including department, major, and addresses. Since you as a consultant cannot change anything about this page, we will leave it alone. One important thing to note is whether or not the customer has requested a privacy block. The information about customers in Remedy is imported straight from University sources, and customers who have requested that the University not publish their contact information are not excluded. However, Remedy has two visual notifiers to let you know that this information is private. The Customer page tab, usually green when a customer is entered, turns red, and a disclaimer appears in the upper-right hand corner of the Customer page:

A rectangular button with a blue border and the word "Customer" in black text.A blue rectangular box containing the text "Customer has requested privacy block" in a red, italicized font.

Please respect the wishes of those who have requested this privacy.

### 4.3 The Product Page

For those organizations that track and resolve problems related to certain products, software packages, or other specific sources of problems, the Product Page is where these products can be tracked. The Remedy administrators maintain this list of products – if your organization would like a product added to this list, please contact an administrator at [remedy@ncsu.edu](mailto:remedy@ncsu.edu).

### 4.4 The Email Page

This page is where most of your correspondence with customers will occur. This page is an interface to an email package within Remedy, and sending email through this allows you to take advantage of Remedy's email functionality. Email sent out from this page is automatically reinserted into the call, so that a record is kept of correspondence related to the call. Also, replies to email sent from this page are reinserted into the call, and the call status is changed to reflect the reply, even reopening the call if necessary. There are a few parts to the page, including:

**Email To/CC/Subject/Text:** These are the same items you would see in any email program, and they do the same things. If a Customer has been entered for the call in the Customer section of the Main page, then their email address will be entered into the Email To field. If the call was created by an incoming email message, then that reply-to address is put into that field instead. If neither is the case, the field is blank. The Email Subject field will be the Problem Description text from the main page. Note – if you are entering multiple email addresses into one of these fields manually, separate them with a comma ( , ) but without spaces.

**Prefix:** This is the character put in front of included text when you've included the call text into the Email Text field. The character is usually ">", but this can be changed.

**From:** If a customer emails in a problem, the Email To field will show their reply-to address. However, if a consultant then searches for their Customer information and finds it, that Customer email address will be put into the Email To field instead. If you would rather have the reply-to address, click the From button. This is useful if the customer is having problems with the email account listed in the Customer section, and is emailing from another account.

**Include:** Remedy allows you to insert text into an outgoing email message, such as the contents of the Text or History fields in the Main page, the Problem Solution (Soln) from the Solution page (explained below), or your personal email Sig from the User form.

**Send:** The important one – this button sends the email to the customer, reinserts the email into the call, activates other active links needed by Remedy, and saves the call into the central database.

#### **4.5 The Attachments Page**

The Attachments page stores attachments that have been sent in to a Remedy call via email. The page can be used to open and save these attachments, but cannot be used to edit them or to resend them back to the clients. Outgoing attachments can be associated with the call and sent to the customer using the buttons at the bottom of the Email page.

#### **4.6 The Scripts Page**

Since Remedy is used to exchange information between organizations on campus, it is often the case that one organization starts a call that will be resolved by another organization. Usually, that target organization has certain information that it needs before it can start resolving an issue. For this, Remedy has Scripts – prewritten lists of questions and instructions that anyone in Remedy can use when logging a call for another organization. The initial organization can create the call, select the appropriate script from the list on the Scripts page, and the questions will be inserted into the Text field on the Main page. Then, the consultant can ask the customer the appropriate questions, and have them in a preset format for the target organization. As with products, scripts are maintained by administrators. If your organization would like to utilize this feature, please contact an administrator at [remedy@ncsu.edu](mailto:remedy@ncsu.edu).

#### **4.7 The QuickCalls Page**

Many organizations use Remedy to track call volume as well as problems. The NC State Help Desk, for example, logs every instance of a password reset, even though the call will immediately be Closed. This is for report generation – Remedy can keep track of everyone seeking assistance there, not only those with time-consuming problems. To expedite this process, the Help Desk uses a QuickCall. The consultant simply needs to find the customer’s information in the Main page, go to the QuickCalls page, select the “password reset” QuickCall, and Remedy does the rest. Remedy creates the call, fills in the appropriate Problem Description and Text, associates the call to a Solution if necessary, and then closes the call. What would take a consultant 1-2 minutes now takes less than 10 seconds. This functionality is available for any organization interested – simply contact an administrator at [remedy@ncsu.edu](mailto:remedy@ncsu.edu) for more information

#### **4.8 The Solutions Page**

Another advantage about having one central database for customer support exchange is that you can share more than just current problems. Over the past few years, we have compiled a database of over 2,500 solutions to frequently-asked questions across campus. Everything from “How can I get a Unity account?” to “How do I access the library card catalogs?” can be found in the database, and this has many advantages. With the

information in a central database, all of the support organizations on campus can access information about systems and software that they do not support, but may be asked about. Also, when customers are given responses about a reoccurring problem, the answers are always consistent and correct, since they all come from one easily-updateable source instead of the brains of 200 different consultants.

The tracking system formerly used at NC State had a built-in solutions database, and handled call-solution linking easily. Remedy was not so streamlined, so the Remedy implementation team had to design an interface to make the data usable again. What they came up with is divided into eleven sections:

**Query/Keywords:** This field is where you will enter your question or list of keywords when looking for a solution in the database. By default, the subject of the incoming email message (or Remedy's Problem Description field) will be entered, but you can easily change this. Once the words you deem appropriate are in this field, click Search to search the database for a solution.

**ID:** Every Remedy solution is given a unique ID when it is created, so it can be easily indexed and referred to. This is created and entered by Remedy when the solution is first created, and does not change. If you already know the ID of the solution you are looking for, enter it here and press Return to display that solution.

**Status:** Solutions have one of four status settings: Draft, Reviewed, Published, Retired. Although these settings are not used heavily now, they may be used to limit solution creation in the future. Draft and Reviewed solutions would have to be approved by an administrator, and they would then be Published. Old, outdated solutions would be Retired by an administrator as well.

**Content:** Although not a commonly-used field, the Content field can be used to identify the type of content in the solution, choosing from Plain Text, HTML, PostScript, Rich Text Format, and UNIX man page format.

**Distribution:** Not all solutions are for the public eye – some are for consultant use only. For this, Remedy has the Distribution field. Solutions can be set to All (where web users and Remedy users have access), NC State Only (where users on campus using the web or Remedy have access), or Internal (where only Remedy users have access).

**Workgroup:** Also not a commonly-used field, the Workgroup field can be used to group solutions that may not belong in another Remedy workgroup, for ease in searching. This does not exclude them from any other searches.

**Problem Summary:** The Problem Summary is a brief description of the problem addressed by this particular solution.

**Solution Summary:** This is a brief description of the solution used to fix the problem addressed.

**Solution Full Text:** This is the full solution text, including problem and solution, with as much detail and example as possible.

**Keywords:** When a solution is found, this field will list all of the keywords associated with that particular solution. If a Query is entered that contains a keyword in this field for a particular solution, that solution will be listed as a match.

**Solution Summary/Status/Keywords Matched/Workgroup/ID:** If a solution is found in a keyword search, it will appear in a list in this table. By clicking on that solution, its information will fill in the fields above. If you click on one of the list headings, the solutions will sort by that field.

**Recent:** This button will display a list of the solutions that you have used most recently. By default, the system will remember up to 15 of your favorite solutions. This list is maintained automatically and is based on the frequency with which you associate solutions with calls.

Once you have found the solution you are looking for, clicking on it will associate the solution with the call. You can then include it in an email message using the Email page, or use it as a tracking mechanism later, looking for all calls associated with a particular solution.

#### **4.9 Logging a call with Remedy**

Different organizations will log calls for different reasons. Some departments log problems for future resolution, while others log all customer correspondence for tracking purposes. Most departments do both in their everyday routines, and so a simple “how-to” for logging calls isn’t very simple. However, there is a general flowchart concept for creating a call (as shown in Appendix A). This can be edited as needed for different organizations, which may want certain calls in a certain format.

#### **5.0 Conclusion**

This should hopefully get you started using Remedy. As you use Remedy more and more, you will get used to its basic features as well as get introduced to its more advanced capabilities. For more information on the Remedy implementation at NC State, review:

<http://remedy.ncsu.edu/project/>

For the latest news releases from the NC State Remedy team, check out:

<http://remedy.ncsu.edu/project/status/>

For all other questions, please send email to:

[remedy@ncsu.edu](mailto:remedy@ncsu.edu)

## Appendix A Flowchart for Remedy call creation

