# **INCIDENT MANAGEMENT** UPDATING AN INCIDENT RECORD

#### **RETREIVING INCIDENT**

Within the Incident Management Console:

- 1. Select the **Show** drop down to filter on Incidents submitted by you, assigned to you, or Incidents assigned to your selected groups.
- 2. Filter By allows to filter on Incidents by priority
- 3. Role will display Incidents based on Assignment or ownership
- 4. To open an Incident double click the record.

NOTE: If using the Search Incident Screen. You must specify the **Company+** if you wish to search the **Service+** Field

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#### **REASSIGNING INCIDENT**

1. Select the Drop Down to the right of Assigned group. Select the **Company**; Choose the **Support Organ**ization and Select the Assigned Group\*+ ITL Process Owners

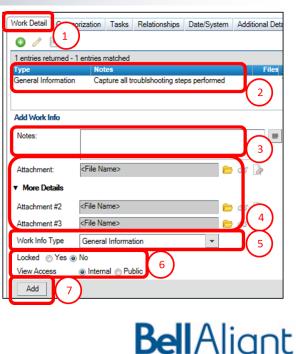
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NOTE: Assigned Group+ is a searchable field, you can quickly find groups with partial name searches

## ADDING WORK DETAIL

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- 1. Select the Work Detail tab on the Incident
- 2. View existing Work Detail records
- 3. This is where you capture new Work Detail
- 4. You can add multiple Attachment
- 5. Work Info Type must be selected based on logical type of work you are documenting (i.e.: Customer Follow-up track-ing)
- Locked will not allow modifications to the work log when added. View Access if set to Internal will block Customers who access the record from seeing that entry (only for read only/non-support customers)
- 7. Select Add to add the new Work Detail record



## **INCIDENT REALATIONSHIPS**

- 1. On the Incident record select the Relationships tab
- Quick Actions is a drop down menu that contains a number of actions to perform against the Related record. (i.e.: Get Product or Operational Categories; create CI Unavailability; view relationship types, etc...)
- 3. This area will display all Related records to the Incident record.
- 4. The **Search** menu will allow you select a record type to begin a Search

Search Criteria					5 Use Basic Ser
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	CI ID	ADOBE FLASH PRO MS VISIO PRO 2010	Serial Number	CI Status In Inventory In Inventory	Company * Bell Alant Bell Alant

## **INCIDENT TASKING**

Tasking Capability is available in Incident Management and will replace the WorkLog assignment feature of ITSP.

- 1. Within the Incident Record, select the **Task** tab
- 2. This area will display all Tasks that are associated to the Incident Record
- To create a Task record, select the Request Type drop down menu and select either Task

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**Template; Task Group Template;** or **Ad hoc**, then choose **Relate**. This will launch a either the template selection menu or a new blank task. To learn how to submit and work a task please see the Task Management Quick Reference Guides.



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## 5. Select Use Advanced Search

5. Specify Search Criteria, be as specific as possible to limit number of records returned

7. Select Search

8. Once the search completed it will display all matches in this window, highlight the record you want to realte

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9. Select Relate