

# INCIDENT MANAGEMENT

## UPDATING AN INCIDENT RECORD

### RETRIEVING 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

The screenshot shows the Incident Console interface. Callout 1 points to the 'Show' dropdown menu. Callout 2 points to the 'Filter By' dropdown menu. Callout 3 points to the 'Role' dropdown menu. Callout 4 points to a row in the 'Incidents' table, which includes columns for Incident ID, Request ID, Incident Name, Category, Priority, Status, Assigned To, and Location.

### REASSIGNING INCIDENT

1. Select the Drop Down to the right of Assigned group. Select the **Company**; Choose the **Support Organization** and Select the **Support Group** to assign the Incident too.

The screenshot shows the 'Assigned Group+' dropdown menu. Callout 1 points to the dropdown arrow. The dropdown list shows 'Bell Aliant' selected, with other options like 'Bell Canada' and 'CGI' visible. To the right, there are lists for 'Client Site Services' and 'CSS Deplo'.

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

### ADDING WORK DETAIL

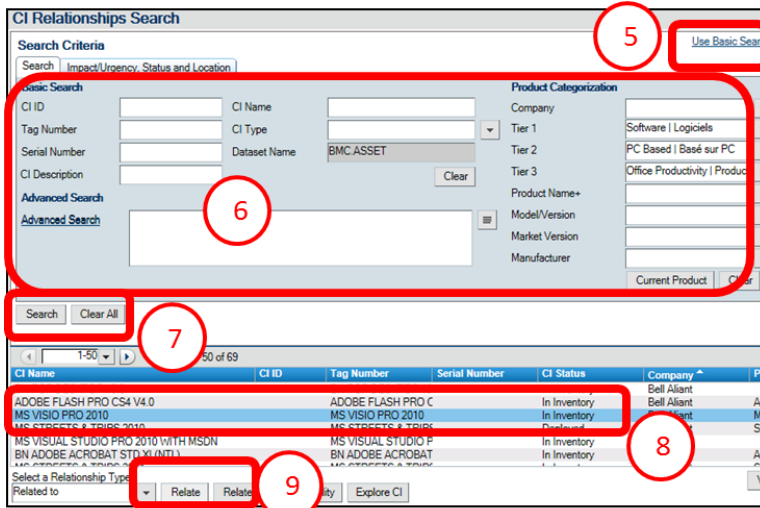
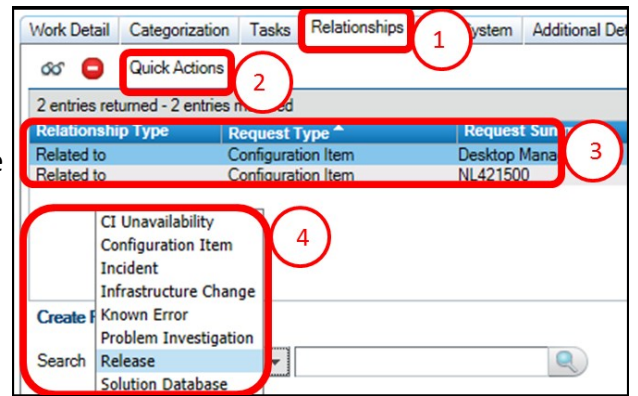
1. Select the **Work Detail** tab on the Incident
2. View existing Work Detail records
3. This is where you capture new **Work Detail**
4. You can add multiple **Attachment**
5. **Work Info Type** must be selected based on logical type of work you are documenting (i.e.: Customer Follow-up tracking)
6. **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

The screenshot shows the 'Work Detail' form. Callout 1 points to the 'Work Detail' tab. Callout 2 points to the 'Type' dropdown menu. Callout 3 points to the 'Notes' text area. Callout 4 points to the 'Attachment' field. Callout 5 points to the 'Work Info Type' dropdown menu. Callout 6 points to the 'Locked' checkbox. Callout 7 points to the 'Add' button.



## INCIDENT REALATIONSHIPS

1. On the Incident record select the **Relationships** tab
2. **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



5. Select **Use Advanced Search**
6. 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 relate
9. Select **Relate**

## 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
3. To create a Task record, select the **Request Type** drop down menu and select either **Task Template**; **Task Group Template**; or **Ad hoc**, then choose **Relate**. This will launch 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.

