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Customer Care Center – Ticket System

LOGGING ON

To access the Service Now Enterprise Help Desk Tool, go to the Inside Portal - <http://inside.off.state.ny.net>.

The screenshot shows the 'inside' portal for CIO/OFT employees. The left sidebar contains navigation links such as 'Business Units', 'My Profile', 'Forms', 'Communication Center', 'HR Information Center', 'CIO/OFT Related Information', 'CIO/OFT Policies & Info Bulletins', 'Project Management', and 'Health & Safety/Emergency'. The main content area is divided into three columns. The first column, 'Hot News', lists several announcements from 11/18/10 to 10/22/10, including reminders about holiday observance, CIO/OFT Council presentations, and workshops. The second column, 'Sefa (State Employees Federated Appeal)', features a progress chart for the 2010 Sefa Campaign. The chart shows a goal of \$40,000 for 'Money Raised' (currently at \$16,447.50) and a goal of 22% for 'Participation Rate' (currently at 7%). A video player is visible below the chart.

Once at the Inside Portal page, on the left hand side of the page, you will find the Icon for your CIO/OFT Applications.



This will bring you to the WS04 log in page. Here you will need your active NYSDS – New York State Directory Services (LDAP or Site Minder) Username and Password.



ACCEPTABLE USE POLICY FOR USERS OF NYeNet APPLICATIONS

This application uses the Central Directory Service of the NYeNet for authentication and authorization. In addition to any obligations arising under acceptable use policies implemented by NYeNet Participating Organizations, logging into this application indicates your agreement to abide by the following:

1. You shall use this application only for purposes directly related to the conduct of official business and the application shall not be used for nonpublic purposes including, but not limited to, the pursuit of personal activities, the mass distribution of unsolicited messages ("spamming"), and the promotion of commercial ventures or religious or political causes;
2. You shall be responsible for any activity attributable to the use of your account whether by you or any other person;
3. You shall not engage in activities that may cause interference with or disruption to any network, information service, equipment or user thereof;
4. You shall comply with all applicable confidentiality and security requirements and shall not seek information on other users or attempt to obtain access to, copy, or modify other users' files without express permission;
5. You shall not violate the rights of any person or entity protected by copyright, trade secret, patent, or other similar laws or regulations;
6. You shall not use this application for any illegal purpose, including, but not limited to, the transmission of obscene or harassing materials; and
7. You must report any abuse or misuse of this application to OIT and you shall cooperate fully in any investigation into any such abuse or misuse.

Please Login

Username:

Password:

[I forgot my username](#) | [I forgot my password](#)
[Agency Assistance & Contact Information](#)

After a successful log on, you should see the following page:

The screenshot shows the NYS User Management Site in Internet Explorer. The page header includes the New York State logo and 'Directory Services'. A welcome message for Cheryl is displayed, along with her login date. Below this is a section for 'Your Account Information' with a table of personal details. Further down, there is a section for 'You have access to the following applications' with several buttons for different services.

First Name	Last Name
Cheryl	Covey-Scott

E-mail address	Telephone number	Fax number
Cheryl.Covey-Scott@ofc.state.ny.us	518-485-2679	

Street	City, State Postal Code	Country
Bldg. 8, New York State Bldg. Campus	Albany, NY 12227	us

Available applications:

- OFT Statewide Telephone Directory
- NYS Learn
- NYS OFT Project Portfolio Management
- New York Government Learning Center
- CIO/OFT Service Management System (Intranet)
- CIO/OFT Service Management System (Internet)
- e-Learning Application
- OpenSystems Inquiry
- Database catalog of OpenSystems servers and applications:

Choose the option for CIO/OFT Service Management System. Service Now is externally hosted, there will only be the option for Internet, not Intranet as before.

INCIDENT MANAGEMENT MAIN MENU

This is your main menu for Service Now. On your left hand side of the screen you will see the **NAVIGATION** menu. This menu has links to your Homepage, Knowledge Articles, Open Incidents, etc. To minimize the Navigation menu, click the small button on the blue bar that says: Welcome (User). Clicking again will bring it back.

The screenshot shows the CIO/OFT IT Service Management main menu. The page has a navigation menu on the left and a main content area. The navigation menu includes links for Self-Service, Homepage, Knowledge, Help the Help Desk, My Open Incidents, My Closed Incidents, My Profile, and Incident management options (Create New, Assigned to me, Assigned to My Group, Open, Returned, Resolved, Pending Closure, Closed). The main content area is titled 'ITSM Homepage' and includes a Knowledge Search box, a News section (No items), and a 'My work' section with a table of incidents.

Number	Short description
INC0010759	Password Reset for TEACH
INC0010760	Password Reset for Citrix user
INC0010761	Password Reset for TAX
INC0010762	User needs MS Outlook installed on PC.
INC0010763	User needs information on TEACH application
INC0010792	Reset my password
INC0010795	Account Unlock for OCFS Connections
INC0010799	Password reset for OCFS AIMS
INC0010802	Planned Power Outage for Site B4H on 12/25/10 from 7:00 AM to 4:00 PM.
INC0010807	Password Reset for DOL UI Benefits

CURRENT TICKET VIEW

Incident
Submit Refresh Caller Info Import User Save

Number: INC0011084	State: New
Short description: <input type="text"/>	
Caller Not Found: <input type="checkbox"/>	Suspend: <input type="checkbox"/>
Caller: <input type="text"/>	Opened: 2010-11-04 09:46:23
Current Contact Number: <input type="text"/>	Opened by: Brooke Armstrong (ABroo)
Alternate Contact: <input type="text"/>	Assignment group: <input type="text"/>
Location: <input type="text"/>	Assigned to: <input type="text"/>
County: <input type="text"/>	Master Ticket: <input type="checkbox"/>
Watch list: <input type="checkbox"/>	Knowledge: <input type="checkbox"/>
ITIL Watch list (Receives work notes): <input type="checkbox"/>	Group Watch List: <input type="checkbox"/>
	OU Watch List: <input type="checkbox"/>

Description
[Close]

Category
Activities Hardware Related Records New Caller Closure Information

Category
[Close]

Category: -- None --	Impact: -- None --
Subcategory: -- None --	Urgency: -- None --
Product Type: -- None --	Priority: 3 - Moderate
Problem Type: -- None --	Application URL: <input type="text"/>
Agency Affected: <input type="checkbox"/>	CNS Agency Code: -- None --
	User Domain: -- None --

Submit Refresh Caller Info Import User Save

OPENING A NEW INCIDENT

To create an **INCIDENT**, select **CREATE NEW** from the Incident section on the Navigation menu. Only Help Desk Agents and Data Center Operators will have this option.

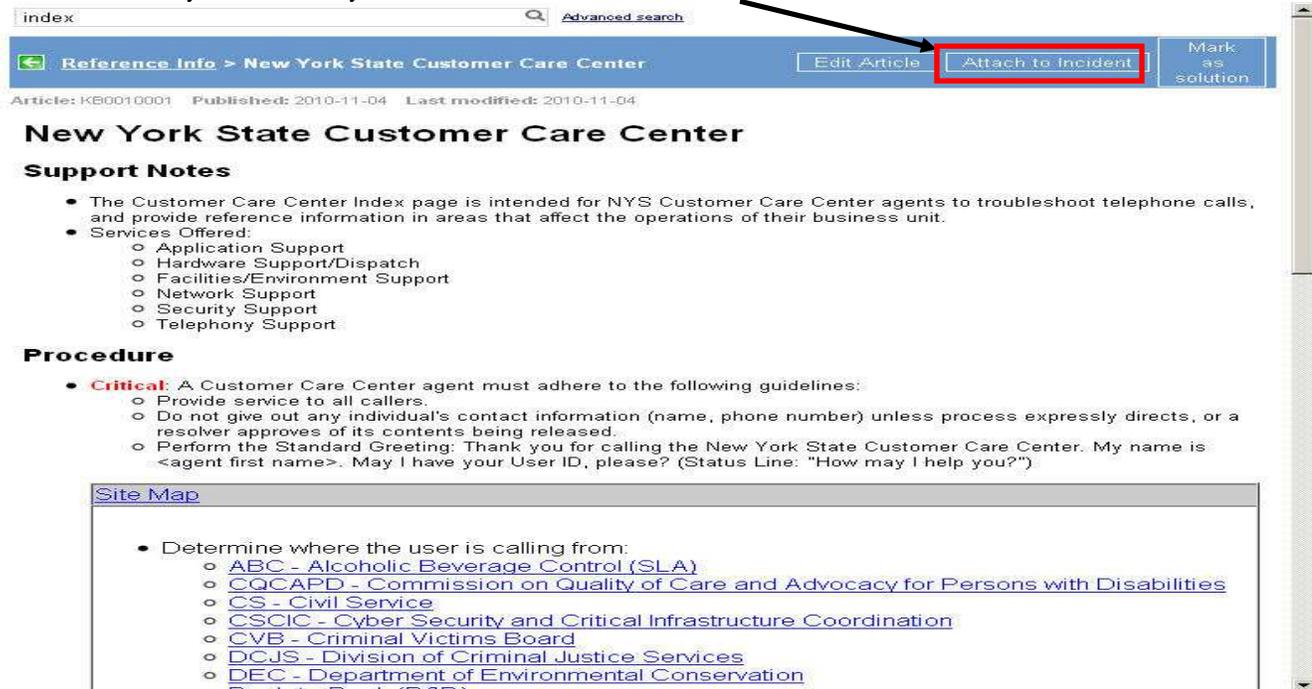
Incident
[Up]

- Create New
- Assigned to me
- Assigned to My Group**
- Open
- Returned
- Resolved
- Pending Closure
- Closed

SHORT DESCRIPTION: description of Incident that accurately describe the problem in less than 80 characters. This will be the subject of all the Notifications regarding this Incident. This description field is only modifiable by the Help Desk Agents. If you find the description does not accurately reflect the Incident, please call us and have it changed.

Short description:
[Lightbulb] [Printer]

KNOWLEDGE ARTICLES: Formerly known as Knowledge Management, these pages are the source of all Agency Information, Troubleshooting steps, Escalation steps, Ticket Coding, and all other information. You can access these articles by either the Navigation pane or the  book next to the Short Description. Once you have found the article you have chosen as your solution, you can attach it to the Incident.



index

Reference Info > New York State Customer Care Center

Article: KB0010001 Published: 2010-11-04 Last modified: 2010-11-04

New York State Customer Care Center

Support Notes

- The Customer Care Center Index page is intended for NYS Customer Care Center agents to troubleshoot telephone calls, and provide reference information in areas that affect the operations of their business unit.
- Services Offered:
 - Application Support
 - Hardware Support/Dispatch
 - Facilities/Environment Support
 - Network Support
 - Security Support
 - Telephony Support

Procedure

- Critical:** A Customer Care Center agent must adhere to the following guidelines:
 - Provide service to all callers.
 - Do not give out any individual's contact information (name, phone number) unless process expressly directs, or a resolver approves of its contents being released.
 - Perform the Standard Greeting: Thank you for calling the New York State Customer Care Center. My name is <agent first name>. May I have your User ID, please? (Status Line: "How may I help you?")

Site Map

- Determine where the user is calling from:
 - [ABC - Alcoholic Beverage Control \(SLA\)](#)
 - [CQCAPD - Commission on Quality of Care and Advocacy for Persons with Disabilities](#)
 - [CS - Civil Service](#)
 - [CSCIC - Cyber Security and Critical Infrastructure Coordination](#)
 - [CVB - Criminal Victims Board](#)
 - [DCJS - Division of Criminal Justice Services](#)
 - [DEC - Department of Environmental Conservation](#)

CALLER: Person calling in the Incident. You can either start typing and the system will show you all records starting with those letters or search for the LDAP ID by using the magnifying glass.

Caller Not Found:

If the Caller is a new contact (non LDAP user), Check the box for **CALLER NOT FOUND**, this will make the tab turn **RED**. Fill out all necessary contact information fields.

You can change the **CURRENT CONTACT NUMBER**, but that number will only be associated with this **INCIDENT** only.

Number:	INCD010974
Short description:	<input type="text"/>
Caller Not Found:	<input type="checkbox"/>
Caller:	Brooke Armstrong (ABrooke) <input type="button" value="Magnifying Glass"/> <input type="button" value="Info"/> <input type="button" value="Show Related Incidents"/>
Current Contact Number:	518-486-1093
Alternate Contact:	<input type="text"/>
Location:	<input type="text"/>
County:	<input type="text"/>
Watch list:	<input type="button" value="Lock"/>
ITIL Watch list (Receives work notes):	<input type="button" value="Lock"/>

All **REQUIRED** fields are **RED**, once filled in they turn **GREEN** and System generated fields are **ORANGE**

Click the magnifying glass (**highlighted in green**) next to the Caller field to search for the caller or start typing and the system will auto fill information. Additional information can be found about the caller by hovering over the **INFO ICON (highlighted in blue)** or view other active incidents the Caller has reported by clicking the Show Related Incidents button (**highlighted in Red**).

LOCATION field is backed by the NIRD database; you can either start typing in this field or use the magnifying glass to search the Location Hierarchy table. In some cases, the Site ID is not necessary; this is when you would choose the Exceptions option.

Location:	0	
County:	011 - NYS Assembly Computing Center 01A - State Campus Bldg. 1 01B - Albany County Probation 01E - Parsons Wasson/Rathbone Bldg. 01F - Rehabilitation Support Services - Compeer for Kids 01G - Multimedia Gaming 01H - Community Health Office 01J - CSCIC 01K - Parsons Residence Building 01L - Albany County Family Court 01N - Capital District Child Care Coordinating Council 01O - SUNY Early Childhood Education and Training Program 01P - Center for Family & Youth 01Q - Research Foundation 01R - ESP Corning Tower	
Watch list:		
ITIL Watch list (Receives work notes):		
Description:		
Category:	Activities	Hardware

Locations

Locations Hierarchy

- Exceptions
- New York
- Out of State County

SUSPEND is now a checkbox and not a **STATE**. If you would like an Incident suspended, please call the Help Desk and one of our Agents can Suspend the Incident for you. Once an Agent selects the Suspend check box, they are presented with a Calendar that includes the Time. Once the Incident has reached the Date and Time selected, the Incident becomes Active in the current State it was in. The State does not need to be changed in order for the Incident to be put in a Suspended State.

<< **October 2010** >>

S	M	T	W	T	F	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Go to Today

Time: : :

OPENED time and **OPENED BY** are System generated fields. This indicates the time the Help Desk Agent or Data Center operated created the Incident.

Opened:	2010-10-18 19:28:19
Opened by:	Mark Smorol (MSmorol)

ASSIGNMENT GROUP, you can either start typing the name of the group or search for the Assignment Group in the Hierarchy table by Agency.

Assignment group:	I1
Assigned to:	L1 CQCAPD HELPDESK L1 DCJS HELPDESK
Master Ticket:	L1 DOB HELPDESK L1 DOH GEN SYSTEMS
Knowledge:	L1 DOL HELPDESK
Group Watch List:	L1 DOT HELPDESK L1 EFC HELPDESK
OU Watch List:	L1 NYSP HELPDESK L1 OFT CCC

Group Hierarchy	
+ CIO/OFT	
+ DCJS	
+ DOH	
+ DOL	
+ FMS	
+ L1 EFC HELPDESK	
+ OCFS	
+ OMH	
+ OTDA	
+ VENDORS	

WATCH LISTS are for cases when you need to add other people, Groups or OU's. This can be handy if you have people not part of your Assignment Group, but need to be included on updates and State changes of the ticket. You can either search for the Person or Group or start typing just like the other fields.

Watch list:	<input type="text"/>
	<input type="text"/>
	<i>Enter email address</i>
ITIL Watch list (Receives work notes):	<input type="text"/>
	<input type="text"/>
	<i>Enter email address</i>

Group Watch List:	CIO/OFT
	<input type="text"/>
OU Watch List:	NYS Office for Technolo NYS Department of Lab
	<input type="text"/>

Enter the details of the **INCIDENT** in the **DESCRIPTION** field and all the troubleshooting that was performed for this INCIDENT. If a template is necessary for this INCIDENT, it will populate here when **CATEGORY, SUBCATEGORY, PRODUCT TYPE AND PROBLEM TYPE** is selected.

Description:

This field can be minimized or maximized by clicking on the plus or minus buttons on the top right hand corner of the box.

TABS

Once the **CATEGORY** field is filled in, the **SUBCATEGORY** will prompt you based on your choice. **DO NOT LEAVE ANY FIELD BLANK**. When possible, do not use **OTHER**. After **CATEGORY**, **SUBCATEGORY**, **PRODUCT TYPE** (auto fills AGENCY AFFECTED – you would change Agency Affected by clicking on the lock icon), **PROBLEM TYPE** and **AGENCY AFFECTED** are selected, you will then be prompted to fill out the **IMPACT** and **URGENCY**.

PRIORITY will be auto determined by the criteria you fill to the following 2 areas - **IMPACT (1-5)** and **URGENCY (1-4)**. The table to the right is what calculates this.

Priority Matrix		Urgency			
		1-Critical	2-High	3-Average	4-Low
Impact	1-Enterprise	1	1	2	2
	2-Site	1	2	2	3
	3-Multiple Users	1	2	3	3
	4-User	1	3	3	3
	5-TEC Alert	1	2	4	4

You will next be prompted to the **ACTIVITIES TAB**. Please note: **ADDITIONAL COMMENTS ARE CUSTOMER VISIBLE**. Only include information you would like the Customer to see in this field. By placing information in this field and saving the Incident, a Notification will be automatically sent to the Customer with this information.

WORK NOTES are required every time you change or update the record.

NOTIFICATIONS are System generated. Once a Notification is sent, it is then appended to the Activity tab in a journaled work log. Any time someone responds to the email, the response is added to the log. This way, everything is tracked.

Activity >>

- 2010-09-17 08:47:20 Priority-2 - High: INC0010623 has been assigned to group L3 OFT ADS APPS QA - Email sent
Sent: oft.sm.cns.bto@cio.ny.gov
- 2010-09-17 08:03:43 Priority-2 - High: INC0010623 has been assigned to group L3 OFT ADS ITG - Email sent
Sent: oft.sm.cns.bto@cio.ny.gov
- 2010-09-17 08:03:43 Incident INC0010623 -- opened on your behalf - Email sent
Sent: jfredette@oft.state.ny.us
- 2010-09-17 08:03:42 Initial: Priority-2 - High: INC0010623 has been created by Greg Wheeler (gwheeler1) - Email sent
Sent: oft.dl.sd.notify.SEV1.incidentmanagementna@cio.ny.gov

An example of a system generated notification:

2010-09-17 08:03:43 Priority-2 - High: INC0010623 has been assigned to group L3 OFT ADS ITG - Email sent

Sent: oft.sm.cns.bto@cio.ny.gov

From: ITSM System Sent: 2010-09-17 08:03:43
 To: oft.sm.cns.bto@cio.ny.gov
 Subject: Priority-2 - High: INC0010623 has been assigned to group L3 OFT ADS ITG

Callback Number: 1-800-697-1323
 Incident ID: INC0010623
 Opened: 2010-09-17 07:56:49
 Status: Referred
 Category: Networking
 Subcategory: Connectivity Multiple Sites
 Product Type: SSL VPN
 Problem Type: Hardware Failure
 Caller Name: John Fredette (admJFredette)
 Caller Phone: 518-473-2622
 Caller Email: jfredette@oft.state.ny.us

Site ID: 95C - Office for Technology - Swan Street Bldg. - Core 4
 Agency Affected: NYS Office for Technology

Incident Description:
 Testing Multiple E-Mails 20100917

RefMSG0016485

Activities can be filtered. If you only wish to view State changes, you can do so. Next to the word Activity, you will find double arrows. Once you click on those double arrows, the list expands. This gives you the option on what you can view.

Activity <<

All (12)
 Assigned to (1)
 Assignment group (1)
 Caller (1)
 Category (1)
 Impact (1)
 Incident state (1)
 Priority (1)
 Subcategory (1)
 Problem Type (1)
 Product Type (1)
 Urgency (1)
 Work notes (1)

HARDWARE TAB is required for all Hardware calls. You will notice this is the same information as the previous Service Center. In future releases, our current Inventory Databases will be integrated with the system.

For server issues, be sure to place the server name in the proper field (**Server Name/Serial #**). Don't forget the **IP ADDRESS**.

Category	Activities	Hardware	Related Records	New Caller	Closure Information
Hardware					
Hardware Agency:	-- None --			Hardware IP Address:	
Hardware Model Number:				Hardware Serial Number:	
Hardware Manufacturer:	-- None --			Configuration item:	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Refresh Caller Info"/> <input type="button" value="Import User"/> <input type="button" value="Save"/>					

RELATED RECORDS tab will be used by the Help Desk. When relevant, determine whether this **INCIDENT** can be related to an existing record in the system. If the **INCIDENT** is determined to be a child of an existing **INCIDENT**, enter the **PARENT TICKET NUMBER**. You can either search for the ticket by using the  or by using auto fill and typing the Incident #. This ensures Incidents are properly tracked. All tickets found to be Child Tickets will be updated and Closed by the Helpdesk Agents.

Category	Activities	Hardware	Related Records	New Caller	Closure Information
Related Records					
Parent incident:	<input type="text"/>				
<input type="button" value="Update"/> <input type="button" value="Refresh Caller Info"/> <input type="button" value="Save"/>					
Affected CIs Child incidents Task SLAs (17) Metrics (66)					
Affected CIs <input type="button" value="Edit..."/> <input type="button" value="Task = INCD010546"/>					
Configuration Item					

NEW CALLER tab is used when Caller Not Found: is appropriate. If the Caller does not have an LDAP ID, you will need to enter all information associated with that Caller. This information is only associated with this Incident, it will not be stored for future use. All HSEN callers without an LDAP ID will need to be entered this way.

New Caller	
New Caller ID:	<input type="text"/>
New Caller Name:	<input type="text"/>
New Caller Phone:	<input type="text"/>
New Caller Email:	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Refresh Caller Info"/> <input type="button" value="Import User"/> <input type="button" value="Save"/>	

CLOSURE INFORMATION tab is required when an Incident is put in the Resolved State. Resolver Feedback is a helpful reporting field. Although not required, it is recommended.

Category	Activities	Hardware	Related Records	New Caller	Closure Information
Closure Information					
Closed by:	Robert Greco (rgreco2)			Restored Time:	2010-08-19 13:37:43
Closed:	2010-08-19 16:03:17			Total Time to Restore:	Days 00 Hours 00 :00 :00
Resolver Feedback:	-- None --			Suspend Time:	Days 00 Hours 00 :00 :00
Close code:	Solved (Permanently)			Working Time to Restore:	Days 00 Hours 00 :00 :00
				Handle Time:	Days 00 Hours 00 :00 :00
Close notes: 					
test					
<input type="button" value="Update"/> <input type="button" value="Refresh Caller Info"/> <input type="button" value="Save"/>					

All Closure Codes have been consolidated into one drop down list to avoid redundancy. Because of this, the Closure Notes are not pre-filled based on the selection. This makes Closure Notes a mandatory field. Please include steps you took to resolve the issue, and any other relevant information.

-- None --

- Account Administration
- CCC/IM Change Window Success
- Created Object
- Hang Up
- Hardware Replacement
- No Fault Found
- No Response/Unavailable
- Pre-emptive
- Provided Workaround
- Referred Out
- Repaired/Modified Configuration
- Repaired/Modified Object
- Repaired/Replaced Device
- Restarted Services
- Restored Services
- Software Replacement
- Technical How To
- Other

-- None --

TICKET TOOL BAR

At the top of the Incident you will find the tool bar. Included on this bar you will find the universal symbols for attachments, mail, the toggle tabs icon, the up and down arrows, and the minimize/maximize buttons.

<input type="button" value="Update"/>	<input type="button" value="Refresh Caller Info"/>	<input type="button" value="Import User"/>	<input type="button" value="Save"/>							
---------------------------------------	--	--	-------------------------------------	---	---	---	---	---	---	---

Attachments: Any type of file can be attached to the Incident to aide in troubleshooting efforts.

Mail: Notifications are generated when the ticket is Opened, Updated, Resolved, put in Pending Closure, Closed and any time Additional Comments are made.

Up and Down Arrows: Switch between Incidents.

Toggle Tab Icon: Changes the view of the tabs. You can either view them side by side or consecutive. If you print directly from the screen by selecting the Printer icon located at the top of the screen on the right hand side, it is best if you toggle your tabs in the consecutive view. If not, it will only print the current tab only.

Minimize/Maximize: These buttons minimize or maximize the fields or sections of the ticket. If you are unable to view the whole ticket, check these buttons first.

Update – Updates record and closes INCIDENT.

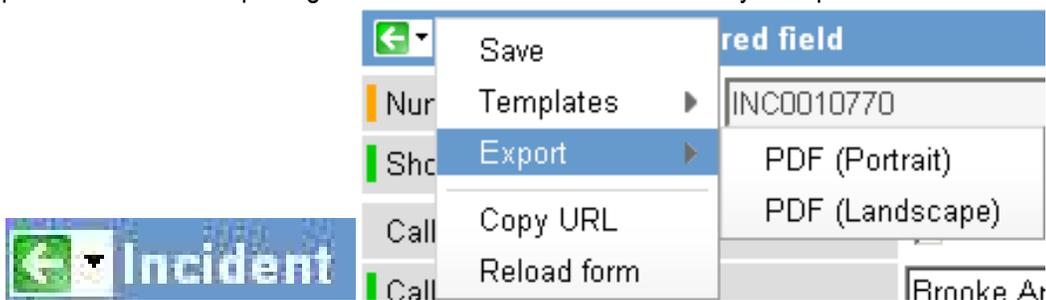
Save – Saves record and keep you in current INCIDENT.

Refresh Caller Info – Refreshes the LDAP information table within the ticket.

Import User – Is only a feature for the Help Desk Agents. This item imports user information from the LDAP database.

PRINTING A TICKET

Use the  printer icon at the top right hand corner of the screen in order to print the ticket, or a preferred method is to use the drop down menu next to the green Incident field. This will export your ticket in a pdf format in either landscape or portrait view. This exporting method is recommended to ensure you capture the whole Incident.



WHAT'S NEW

- Severity is now known as Priority.
- Open is now referred to as New.
- Fault Isolation = Awaiting Problem - Service is restored by permanent correction of the incident or workaround; ticket remains open for Configuration Item information, Request for Change and/or root cause analysis. This status signifies that the ticket has been moved from the Incident Management lifecycle to the Problem Management lifecycle.
- Pending Customer – Is available for everyone to use. This State indicates that the Resolver is waiting on more information on the Customer to gather more information to resolve the Incident.
- Pending Closure – Only available to Help Desk Agents. This replaces Pending Customer for the Service Desk. When an Incident is put in Pending Closure, a Notification is sent to the Customer inquiring whether the Incident has been resolved to their satisfaction, and if so is Closed. If not, the Incident is put back in an Active State and a Notification is sent to the Resolver.

STATES

State	
States	Definition
New (formerly Open)	Status used by the Service Desk when a ticket is initially created. The ticket should not be in Open status longer than it takes the Desk to Record, Classify, Provide Initial Support and Refer the Incident.
*Referred	Incident has been assigned to a resolver group, but has not been claimed.
Work In Progress	Resolver Group has accepted the incident, and is actively working the issue.
Awaiting Problem (Formerly Fault Isolation)	Initial Rollout: – Service has been restored but resolvers are waiting for the issue to repeat itself. Service is restored by permanent correction of the incident or workaround; ticket remains open for Configuration Item information, Request for Change and/or root cause analysis. This status signifies that the ticket has been moved from the Incident Management lifecycle to the Problem Management lifecycle. Post Problem Mgmt Implementation: Incident has resulted in a problem ticket that will provide resolution.
Pending Customer	Incident requires further information from Customer prior to troubleshooting being completed or referral to Resolver; can be used by both the Desk and Resolvers. (For metrics, this stops the clocks while in WIP).
Returned	Ticket has been returned to the Desk for re-assignment to another Assignment Group due to improper referral or to due to incomplete Level 1 troubleshooting.
Service Restored	The incident has been corrected and service restored. Ticket remains open awaiting resolution information or for monitoring purposes for NO longer than a 48 hour period.
Resolved	Incident has been resolved, and can be closed, but awaiting action by closure team.
Pending Closure (Only used by the CCC. Replaces Pending Customer.)	Incident has been identified as Resolved by the Primary Assignment group and initial follow up with Customer has been made; Incident awaiting confirmation of closure by Customer.
Closed	Completes closure process. Both Resolver Group and customer have concluded that service has been restored and Incident can be closed.

Quick Ticket Guide

1. Log on using your NYSDS/LDAP/Site Minder ID



All **REQUIRED** fields are **RED**, once filled in they turn **GREEN** and System generated fields are **ORANGE**

2. Create New

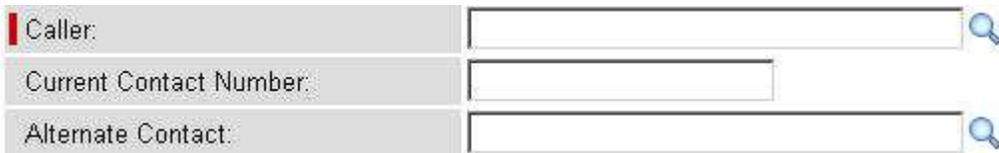


SELECT:
MY WORK, ASSIGNED TO ME or ASSIGNED TO MY GROUP
When updating or viewing an existing **INCIDENT**

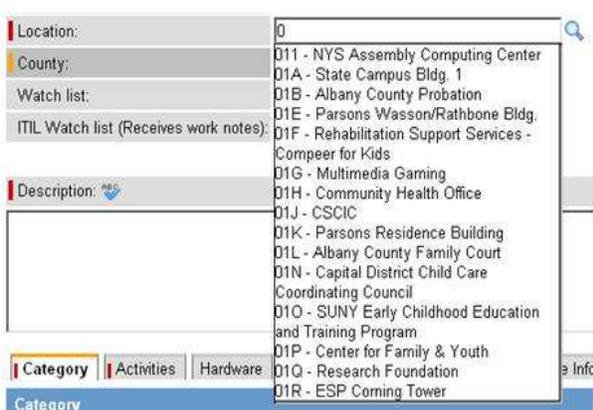
3. Enter a Short Description – this is only 80 characters long and will be the subject of all Notifications in the future.



4. Fill out Caller Information. This pulls from the NYSDS/LDAP/Site Minder Database. Also, provide an Alternate Contact.



5. Enter Location, this pulls from the NIRD (Network Integrity Resource Database). By typing the site ID or selecting from the Location Hierarchy, this auto fills the County.



- Select Assignment Group. This will be the group working the ticket. You can either start typing or use the magnifying glass to search in the Group Hierarchy List by Agency, and then Assignment group.

Assignment group:	I1
Assigned to:	L1 CQCAPD HELPDESK L1 DCJS HELPDESK
Master Ticket:	L1 DOB HELPDESK
Knowledge:	L1 DOH GEN SYSTEMS
Group Watch List:	L1 DOL HELPDESK
OU Watch List:	L1 DOT HELPDESK L1 EFC HELPDESK L1 NYSP HELPDESK L1 OFT CCC

- Enter the details of the Incident in the Description field and all the troubleshooting that was performed for this Incident.

Description:   

This field can be minimized or maximized by clicking on the plus or minus buttons on the top right hand corner of the box.

- Category Tab is next. This is where you will choose from the drop down menus your Category, Subcategory, Product Type and Problem Type. Product Type is what determines the Agency Affected. To change this, click on the  lock icon to add or change the Agency/Agencies. You can either start typing or use the magnifying glass to search for the Agency. Select **ALL** affected agencies.

Category	Activities	Hardware	Related Records	New Cal
Category				
Category:	Networking			
Subcategory:	Connectivity Multiple Sites			
Product Type:	Remote Client VPN			
Problem Type:	Configuration Issue			
Agency Affected:	NYS Office for Technology 			

Agency Affected:	Chemung County
	al
	Albany Convention Center Authority
	Albany County
	Albany County Business Partners
	Albany Police Department
	Alis Business Partners
	Allegany County
	Allegany County Business Partners

Submit **Refresh Call** **Save**

- Priority will be determined by the criteria you fill to the following areas: Impact and Urgency.

Impact:	-- None --	Urgency:	-- None --
Urgency:	-- None --	Priority:	-- None --
Priority:	1 - Enterprise	Application URL:	1 - Critical
Application URL:	2 - Site	CNS Agency Code:	2 - High
CNS Agency Code:	3 - Multiple Users		3 - Average
	4 - User		4 - Low
	5 - TEC Alert		

10. Anytime you save the Incident, you will need to update the Activities Tab – Work Notes. PLEASE BE AWARE that Additional Comments are CUSTOMER VISIBLE. Any time you enter information in this field, a Notification will be sent to the Customer once Save has been select. Once finished with creating the Incident, select Submit.

Category | **Activities** | Hardware | Related Records | New Caller | Closure Information

Activities

Additional comments (Customer visible):

CUSTOMER VISIBLE!!!

Work notes:

11. For server issues, be sure the place the server name in the proper field (Server Name/Serial #), which can be found on the Hardware Tab. Please do not forget the IP address.

Category | **Hardware** | Related Records | New Caller | Closure Information

Hardware

Hardware Agency: -- None --

Hardware Model Number:

Hardware Manufacturer: -- None --

Hardware IP Address:

Hardware Serial Number:

Configuration item:

Submit | **Refresh Caller Info** | **Import User** | **Save**

12. If you have contacted the Assignment Group ex. (Operations paged L2 OFT IATS MF IBM) you should change the ticket State from NEW to REFERRED.

State: Referred

- New
- Referred**
- Work In Progress
- Awaiting Problem
- Pending Customer
- Returned
- Service Restored
- Resolved
- Pending Closure
- Closed

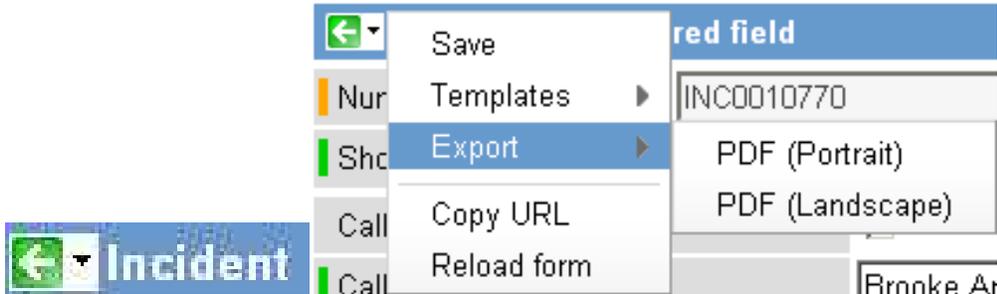
FYI – If the Incident will remain in your bucket (ex. Late Print, CE Fix), You will have to change the Incident State to Work In Progress while the Problem is being addressed.

13. To save and exit the Incident, select Update. To save and stay in the Incident, Save.

Update | **Refresh Caller Info** | **Import User** | **Save**

PRINTING A TICKET

Use the  printer icon at the top right hand corner of the screen in order to print the ticket, or a preferred method is to use the drop down menu next to the green Incident field. This will export your ticket in a pdf format in either landscape or portrait view. This exporting method is recommended to ensure you capture the whole Incident.



UPDATING AN INCIDENT

To update an Incident you can find the Incident the following ways:

On the ITSM Homepage you will find all Incidents assigned to yourself:

[Add content >](#) **ITSM Homepage** [Refresh:](#) Off [Switch to page...](#)

Knowledge Search

 [Advanced search](#)

News

No items

My work

Number	Short description	State	Priority	Opened	Updated
INC0010771	test	Referred	4 - Low	2010-11-22 09:09:52	2010-11-22 12:36:58

To the left of the screen you will see the Navigation Pane; from this location you can select an Incident from the following choices:

- Self-Service
- Homepage
- Knowledge
- My Open Incidents
- My Closed Incidents
- My Profile
- Incident
- Create New
- Assigned to me
- Assigned to My Group
- Open
- Returned
- Resolved
- Pending Closure
- Closed

My Open Incidents: Selects all Incidents that are assigned to you.

Assigned to Me: Selects all Incidents that are assigned to you.

Assigned to My Group: Selects all Incidents that are assigned to your Assignment Group.

To see all open Incidents, choose Open. This will bring you to ALL OPEN INCIDENTS.

Incidents > Active = true

Show Active 20 per page

Active is true

Number	Short description	Priority	State	Assignment group	Assigned to	Updated
INCO010546	test	2 - High	Work In Progress	L2_OFT_CNS_EXEC		2010-11-09 09:12:01
INCO010555	Test	3 - Moderate	Referred	L2_OFT_CNS		2010-11-16 08:17:44
INCO010606	Testing Incident Events Issue	2 - High	Work In Progress	L1_DOL_HELPDESK		2010-10-18 11:17:11
INCO010607	test	2 - High	New	L1_NYSP_HELPDESK		2010-10-18 11:16:50
INCO010608	tst	1 - Critical	Referred	L3_OFT_CNS_BTO		2010-11-22 11:19:15
INCO010623	Testing Multiple E-Mails 20100917	2 - High	Referred	L3_OFT_ADS_APPS_QA		2010-10-25 08:19:42
INCO010625	Test Ticket 20100917 09:25 - Low - Low	3 - Moderate	New	L2_OFT_CNS		2010-10-25 08:19:42
INCO010626	Test Ticket 20100917 09:38 - - Testing	1 - Critical	Referred	L2_OFT_ATP		2010-11-22 11:19:46
INCO010677	Test Incident - 20100930 - Parent Ticket	1 - Critical	Work In Progress	L3_OFT_CNS_BTO		2010-11-22 11:19:45
INCO010692	Test Ticket - 20101006 09:15	1 - Critical	Referred	L2_OFT_CNS		2010-11-22 11:19:45
INCO010693	Test Ticket	1 - Critical	Referred	L2_OFT_CNS_EXEC		2010-11-22 12:40:50
INCO010721	Test for Joe Employee	2 - High	Work In Progress	L2_OFT_CNS		2010-11-16 11:29:22
INCO010722	Test for ENDUSER SNC	1 - Critical	New	L2_OFT_CNS_EXEC		2010-11-22 11:19:46
INCO010754		3 - Moderate	New			2010-11-09 09:12:01
INCO010759	Test	3 - Moderate	Referred	L3_OFT_CNS_BTO		2010-11-16 08:31:54
INCO010760	Test	3 - Moderate	Pending Customer	L3_OFT_CNS_BTO		2010-11-16 09:52:27
INCO010771	test	4 - Low	Referred	L1_OFT_CCC		2010-11-22 12:36:58

From this screen you can search for the following drop down choices.

Incidents Search for text

Number
Short description
Priority
State
Assignment group
Assigned to
Updated

If you know the Incident number you are searching for, type it in the space provided.

Once you find the Incident you need to update, select it. Make any updates needed, include what you did in the Activities Work Notes and update. This will add your changes to the Journalized Work Log at the bottom of the Incident on the Activities Tab.

Incident - Required field

Update Refresh Caller Info Import User Save

Additional comments (Customer visible):

Work notes:

Vendor: -- None -- Vendor Ticket number:

Activity << All Email

2010-11-16 11:29:41 INCO010721 has updated work notes - Email sent

Sent: oft.dl.sd.notify.sev1.cns.level.2@cio.ny.gov

2010-11-16 11:28:40 INCO010721 has updated work notes - Email sent

Sent: oft.dl.sd.notify.sev1.cns.level.2@cio.ny.gov

2010-11-16 09:43:57 INCO010721 has updated work notes - Email sent

Sent: oft.dl.sd.notify.sev1.cns.level.2@cio.ny.gov

2010-11-16 09:42:27 INCO010721 has updated work notes - Email sent

Sent: oft.dl.sd.notify.sev1.cns.level.2@cio.ny.gov

2010-11-16 09:06:58 INCO010721 has updated work notes - Email sent

Sent: oft.dl.sd.notify.sev1.cns.level.2@cio.ny.gov

2010-10-13 09:48:08 Incident INCO010721 -- opened on your behalf - Email sent

Sent: oft.sm.cns.bto@cio.ny.gov

2010-10-13 09:48:08 Priority-2 - High: INCO010721 has been assigned to group L2_OFT_CNS - Email sent

Sent: oft.dl.sd.notify.sev1.cns.level.2@cio.ny.gov

2010-10-13 09:48:08 Initial: Priority-2 - High: INCO010721 has been created by CCC Agent (CCCAGENT) - Email sent

Sent: oft.dl.sd.notify.sev1.incidentmanagementna@cio.ny.gov

FILTERS

If you would like to build a filter, you would do so by clicking the plus sign next to the hyperlinked [Incident > Active=True](#). This brings up the following:

The screenshot shows a filter builder interface with the following filters:

- Active is true
- and Category is Networking
- and Opened between Last week and Today

The main table displays incident data with columns: Number, Short description, State, Assignment group, Assigned to, and Update. A calendar pop-up for November 2010 is overlaid on the table.

Number	Short description	State	Assignment group	Assigned to	Update
INC0010546	test	Work In Progress	L2 OFT CNS EXEC		2010-11-0
INC0010555	Test	Referred	L2 OFT CNS		2010-11-1
INC0010606	Testing Incident Even	Work In Progress	L1 DOL HELPDESK		2010-10-1
INC0010607	test	New	L1 NYSP HELPDESK		2010-10-1
INC0010608	tst	Referred	L3 OFT CNS BTO		2010-11-2
INC0010623	Testing Multitole F-Mails 20101017	Referred	L3 OFT ADS APPS QA		2010-10-3

You can save as many filters as you would like. You will find them by selecting the drop down menu next to Show.

The 'Show' dropdown menu is open, displaying the following options:

- All
- Active**
- Active - Unassigned
- Assigned to me
- Brooke's Filter
- Closed
- My Groups - Unassigned
- My Open Incidents
- Priority 1 Tickets
- Edit personal filters

You can "filter" any Incidents by right clicking and selecting either show matching or filter out.

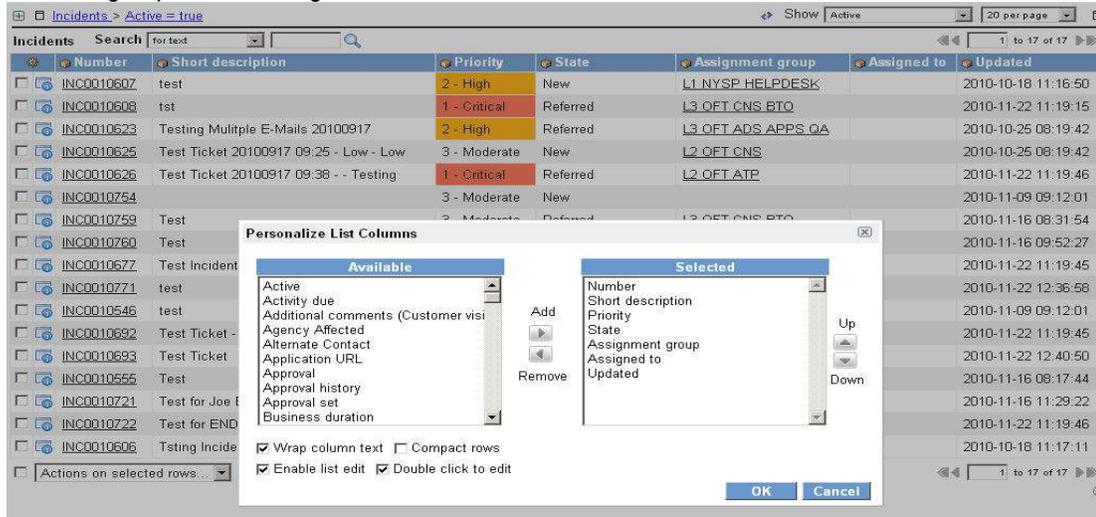
The context menu is open over a table row, showing the following options:

- Show Matching
- Filter Out
- Copy URL to Clipboard
- History

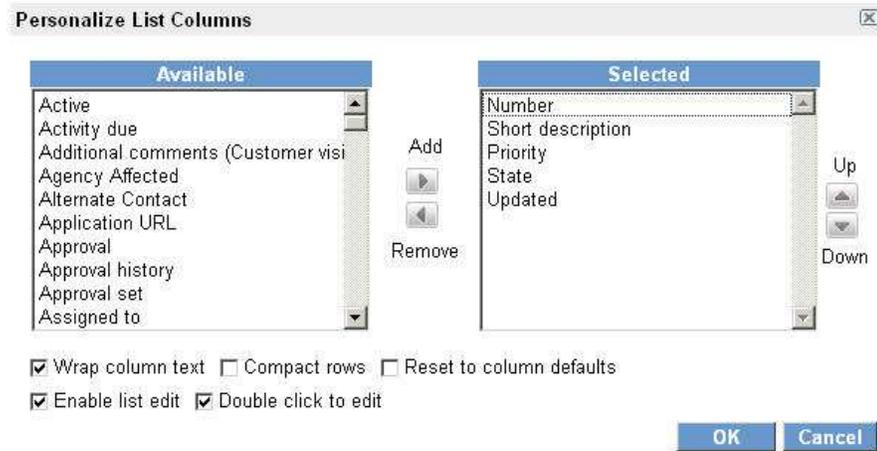
To edit the column headings, choose the gear to the left of the Column Headers.

The column headers are: Number, Short description, Priority, State, Assignment group, Assigned to, and Updated. A gear icon is visible to the left of the 'Number' header.

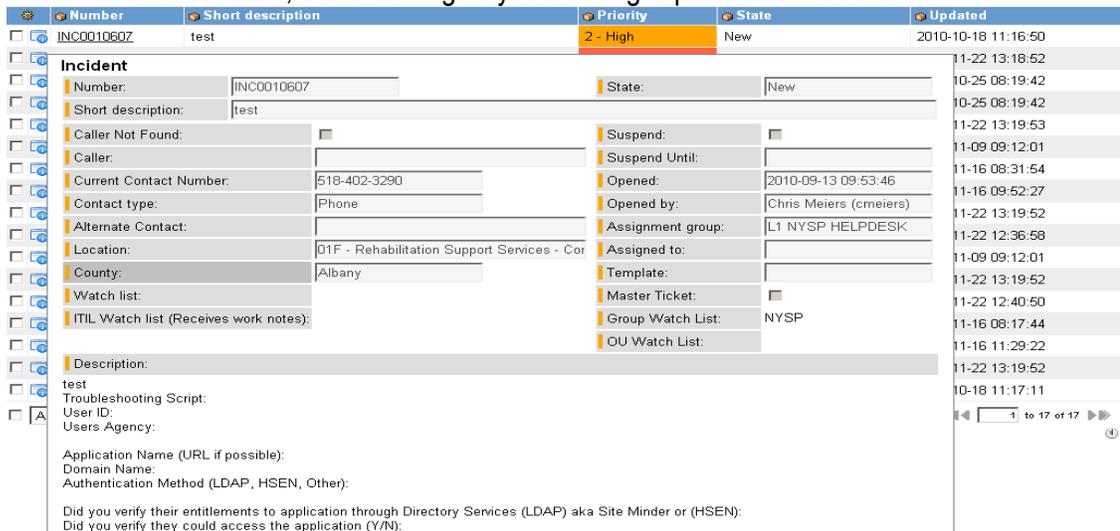
This brings up the following screen:



If you decide you do not like your selection, you can Reset to Column Defaults:



If you are looking at the Open Incidents, and you do not want to go through each and every one you can simply hover over the Information Icon, and this will give you a brief glimpse of the Incident.



LOGGING OUT

To logout of the system, simply select the logout icon on the top right hand of the screen. This logs you out of the system and off Ny.Gov.



Log Out Successful



[We have changed our appearance](#)

You have been logged off NY.Gov

[NYSDS General Information](#)
