

Category tool

Allows to change of case information after its creation and assignment.

In the case attention console, click on the **Category** button, the edition window will open, edition types:

To execute changes without modifying the model select > **Same Model tab** with the following editing options:

- [Change case category \(Same model\)](#)
- [Other changes \(Same model\)](#)

To execute changes and reassignment of the SLA/Service Model ¹⁾ select > **New Model tab** with the following editing options:

- [Change case category \(New model\)](#)
- [Other changes \(New model\)](#)

Change case category (Same model)

1. Click on the search icon to open the *category search* window.

1. Ways to search in the catalog:

Select from the drop-down fields by Category or click on the button **Normal Search**, in the text field enter a keyword or phrase. In this mode the Exact Phrase checkbox filters the matches found.

2. Click on the *Select* button next to the category that most accurately describes the case reported.

3. The field will be updated with the new category and detail selected.

Reason for change

Cancel

Add

Same model New model

Click on the search icon to change the category

Category: IT Service\Hardware Support

Details: Incident

Description

Select from the list to change the priority value

Priority: low

Is major:

Title: Monitor issues

Description: While working the user has started to notice that sometimes the monitor flickers or show waves.

Click on the Search icon to change Category and Details

Other case info that can be edited without changing assigned SLA or Service model

2. Once the editing is done, enter a reason for the change, to save click on the **Add** button.

Other changes (Same model)

Editing options:

Priority	Select the new priority value from the drop-down field.
Is major	Enable when is a major or high urgency case. Major cases: Damage caused by these kind of cases can quickly escalate and/or prevent users from completing sensitive work.
Title	General subject of the case.
Description	Enter characteristics and details of the case such as symptoms or frequency of occurrence.

Once the editing is done, enter a reason for the change, to save click on the **Add** button.



If there are additional forms configured in the model, this data can also be edited.

Change case category (New model)

1. Click on the **Add** button (next to the Category and detail fields) to open the *category search* window.
 1. Ways to search in the catalog:
Select from the drop-down fields by Category or click on the button **Normal Search**, in the text field enter a keyword or phrase. In this mode the Exact Phrase checkbox filters the matches found.
 2. Click on the *Select* button next to the category that most accurately describes the case reported.
 3. The field will be updated with the new category and detail selected.
 4. According to the selection of the new category, the SLA/Service Model will be calculated (if applicable).
2. Once the editing is done, enter a reason for the change, to save click on the **Add** button.

Other changes (New model)

Editing options:

Urgency	Select new urgency value from the drop-down field.
Is major	Enable when is a major or high urgency case. Major cases: Damage caused by these kind of cases can quickly escalate and/or prevent users from completing sensitive work.
Impact	Preselected according to the SLA; can also be modified by selecting from the drop-down field. The Impact value is displayed according to the SLA currently assigned to the case.
Priority	Select the new priority value from the drop-down field.
Title	General subject of the case.
Description	Enter characteristics and details of the case such as symptoms or frequency of occurrence.

Once the editing is done, enter a reason for the change, to save click on the **Add** button.

Reason for change

Enter reason for change before saving

Same model **New model**

Urgency: Is major:

Select Category

Category: **Add**

Details:

Workaround:

Id MD	SLA name	Model ↓	Calendar	Max time	Normal time	Model Description
2	Major Incidents	Major Incident	Default	480	120	The main obj...

Description

Impact: Priority:

Title:

Description:

Cancel 

Add 

Click on **Add** button to change **Category and Details**

Other case info that can be edited, the model may change as a result of these changes

Important:



- If the changes require calculation of SLA/Service Model and functional and/or hierarchical groups, the case will be automatically assigned to the corresponding advisors.
- If there are one or more forms associated to the model, these can also be modified.
- If as a result of the changes the SLA/model is reassigned and there are one or more forms that have not been completed with mandatory fields, these must be filled in before saving the changes.

1)

according to the changes made

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