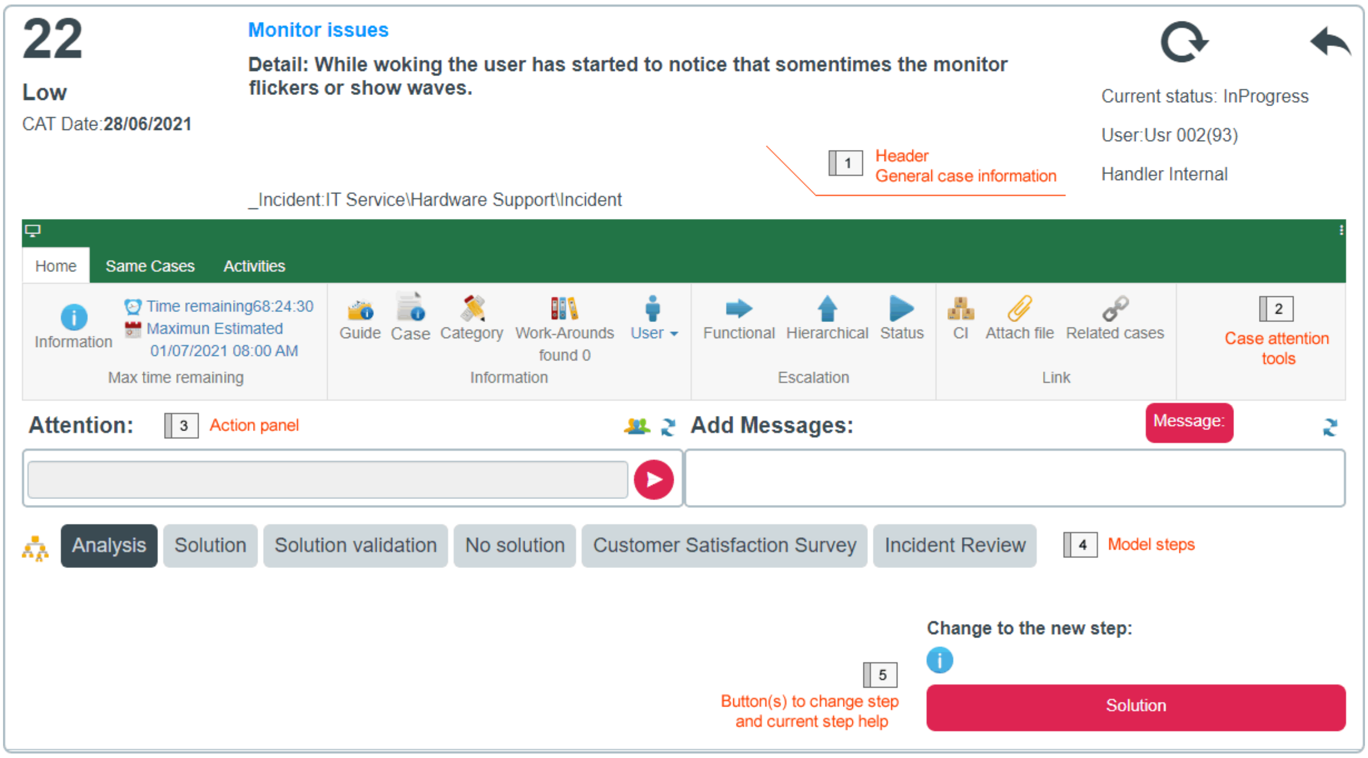
# How to solve an Incident

Log into the ITHelpCenter portal. From the main menu, select *Case Management* > *Console*.
In the case grid, select a case and double click on that record or click on the **Resolve** button.

The case attention window will open:




## 1. Description and Tools in the case attention Console

1 **Header** Basic case data.

- **Case number and assigned priority.** [1]
- **CAT Date:** Creation case date.
- **Title:** General subject of the case.
- **Detail:** Description of the case. By placing the mouse pointer near the detail field, buttons will be displayed to open a subwindow with all the content included in the description.


- **Current status of the case.** See Case Status (detail)
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- **User** User assigned to the case or the user that created the case.
- **Type of advisor attending the case:** Handler, Owner, Manager Informed. User Type
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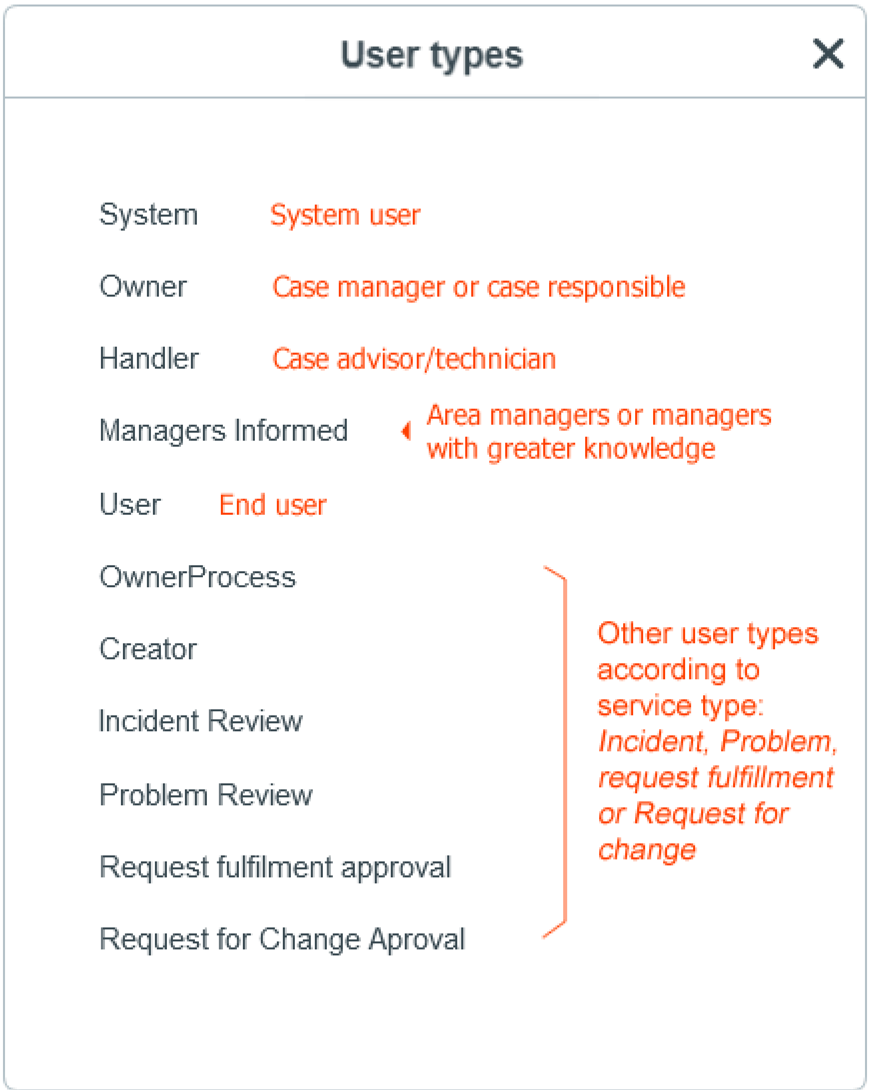
  **User Type**




- **Case type:** Incident, Problem, Request fullfilment, Request for Change .
- **Service category.**

2 **Case attention tools** (Home tab)

- **Maximum remaining time:** Remaining and maximum estimated time calculated from the case creation date and maximum case solution time according to SLA/Model and configured schedules.

- **Information:**
  - **Guide:** Click on **Guide** button, to display the model guide, click on **Accept** to return to console view. See Guide tool
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    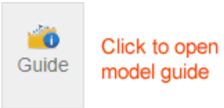
    
    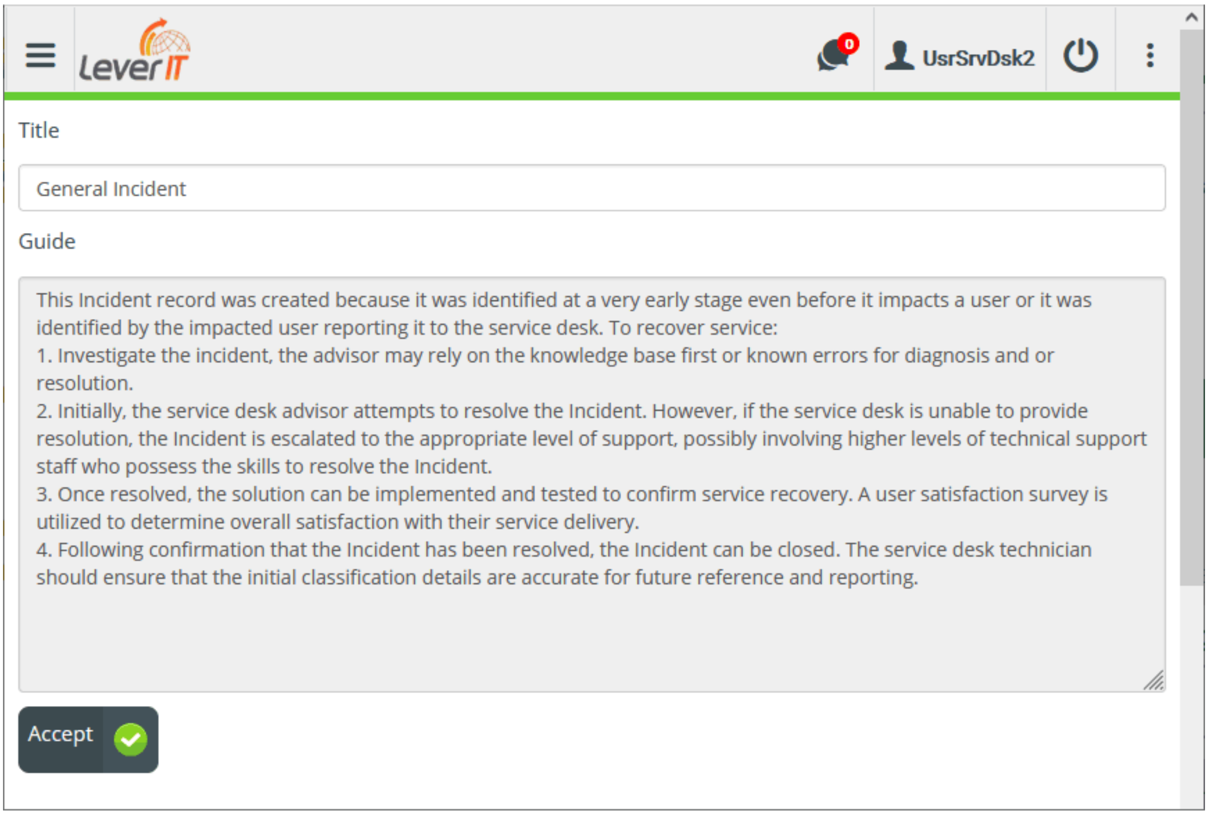
    
  - **Case:** Click on **Case** button, it will open a window that includes 3 tabs:
    General information of the case, users/user type assigned to the case and graphic of the service model/user groups (by type). See Case tool
    ×
  - **Category:** Tool to modify the cateogory, SLA (according to category and other criteria), priority, title, description. These changes can be made in the same model or by changing the case model.
    See Category tool

  - **Workaround:** Tool to show the alternative solution(s) according to the category of the case. See Workaround tool (Knowledge base usage)
    ×
  - **End User info:** User notification(s) method(s).

- **Escalation:** Tools to escalate the case in a functional or hierarchical way: See Escalation tool
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- **Status:** Tool to change the current status of the case. How to change case status
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- **Link:** Tools to link to the current case: Files, CIs, other cases.
  See How to use CI tool
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  See How to use Attach file tool

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See How to use Related cases tool

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| | |
|---|---|
| 3 | **Actions panel** |

- **Attention:** In this field enter the actions according to the current step of the case.
- **Messages:** Allows sending messages to users(end user, owner, manager, etc.) related to the case.

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|---|---|
| 4 | **Service Model Steps** |

Flow of case attention through steps designed in the service model. Besides the case form, additional forms and fields can be configured according to the model type. When enabled, these forms and fields will be displayed after the model steps.

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|---|---|
| 5 | Button(s) to change step and current step help. |

## 2. Incident source and case detailed data

To display detailed case information click on **Case** button, it will open a window that includes 3 tabs: General information of the case, users/user type assigned to the case and graphic of the service model/user groups (by type). See Case tool

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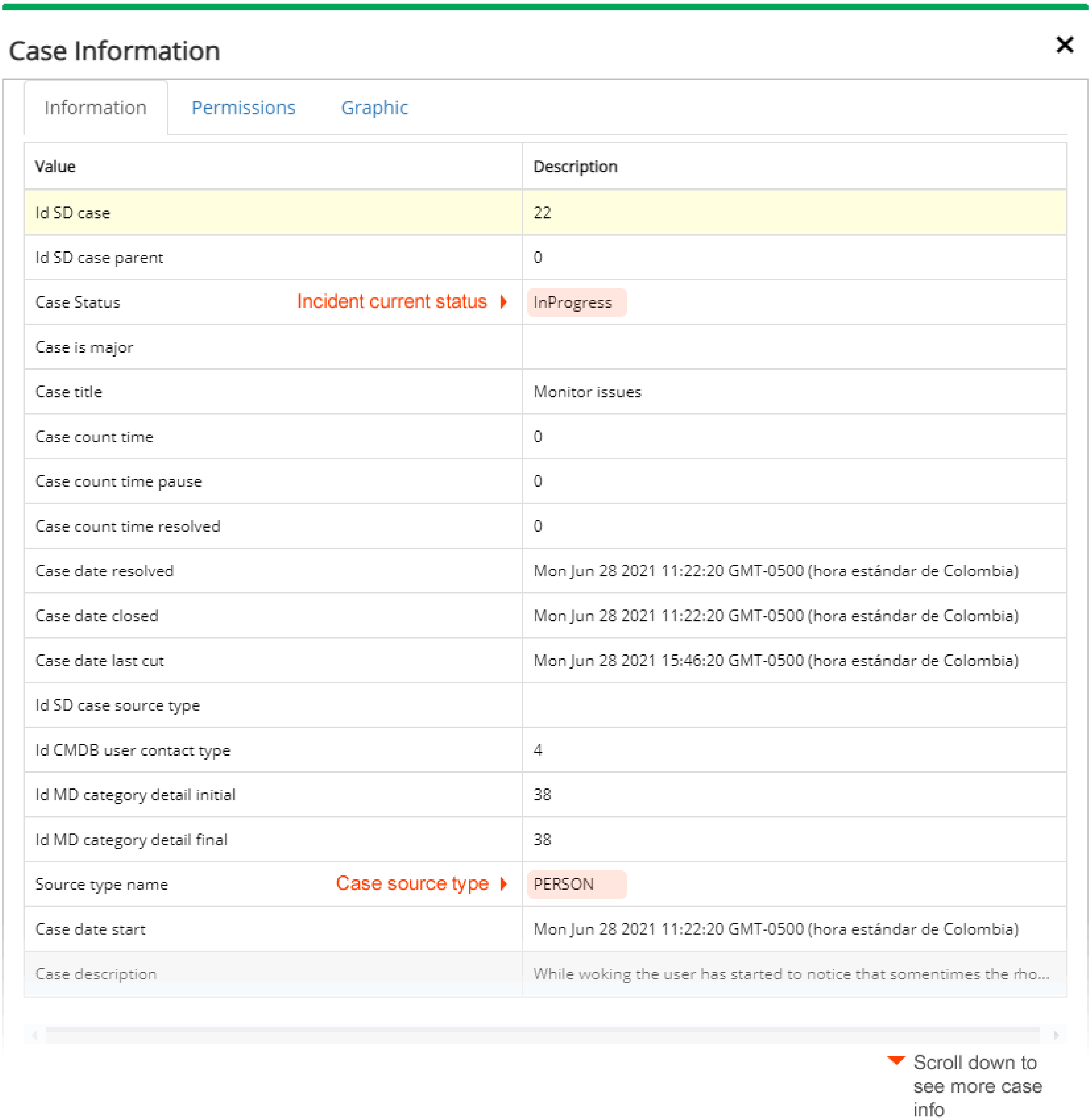
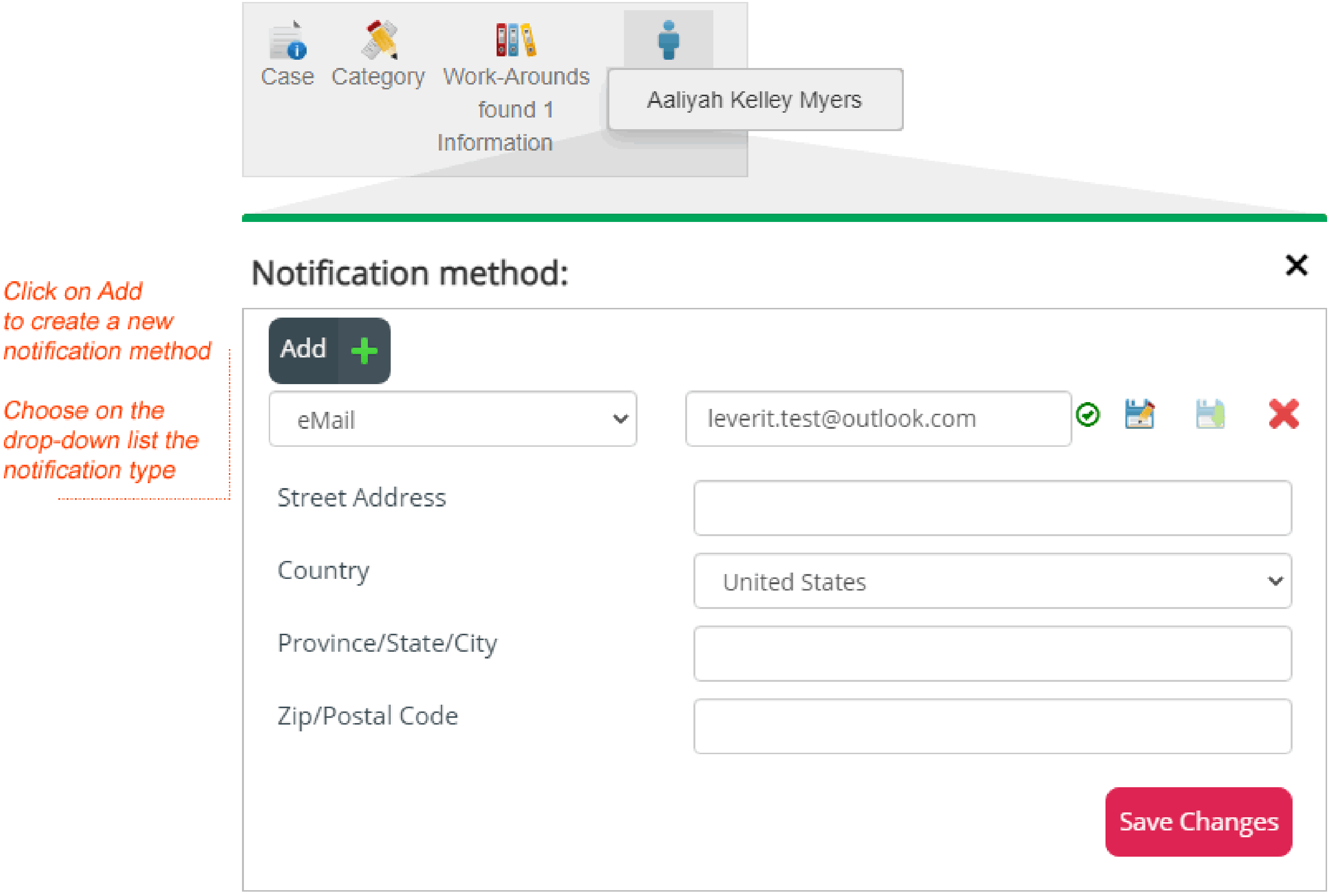



| Value | Description |
|---|---|
| Id SD case | 22 |
| Id SD case parent | 0 |
| Case Status | InProgress |
| Case is major | |
| Case title | Monitor issues |
| Case count time | 0 |
| Case count time pause | 0 |
| Case count time resolved | 0 |
| Case date resolved | Mon Jun 28 2021 11:22:20 GMT-0500 (hora estándar de Colombia) |
| Case date closed | Mon Jun 28 2021 11:22:20 GMT-0500 (hora estándar de Colombia) |
| Case date last cut | Mon Jun 28 2021 15:46:20 GMT-0500 (hora estándar de Colombia) |
| Id SD case source type | |
| Id CMDB user contact type | 4 |
| Id MD category detail initial | 38 |
| Id MD category detail final | 38 |
| Source type name | PERSON |
| Case date start | Mon Jun 28 2021 11:22:20 GMT-0500 (hora estándar de Colombia) |
| Case description | While woking the user has started to notice that somentimes the rho... |

## End-user info

In the case attention window, clic on  button to display end user name and doble clic on the same button to open the user *Notification method* window.

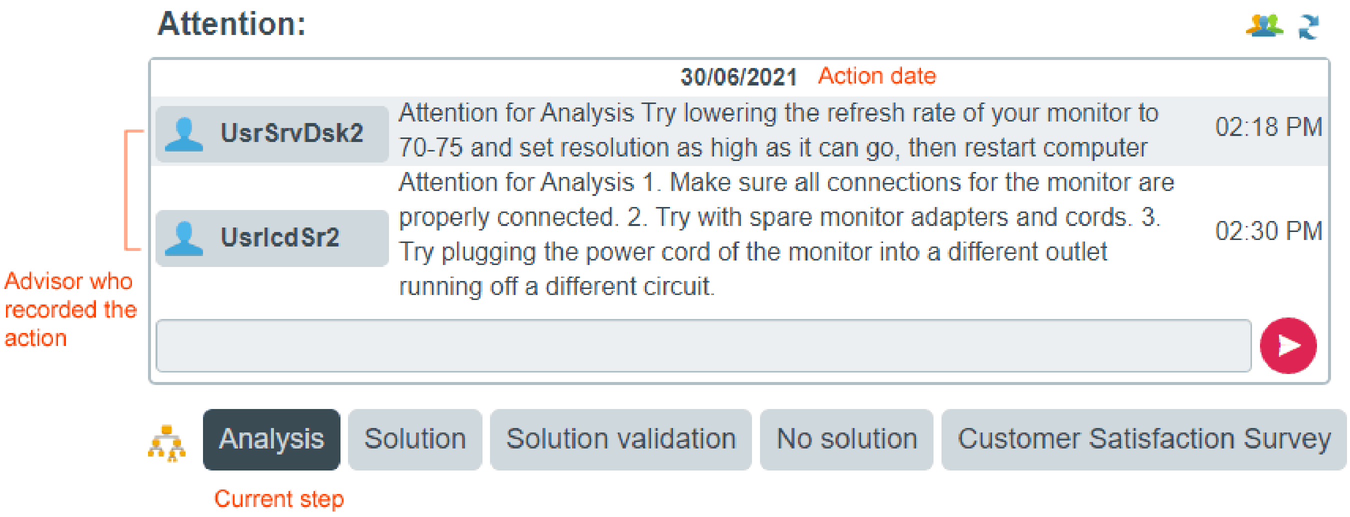



# 3. To start case attention

- At any step during the case cycle it is possible to use the case attention tools.
- Additional forms may exist according to the model configuration. Forms may have mandatory fields that must be completed before changing step.

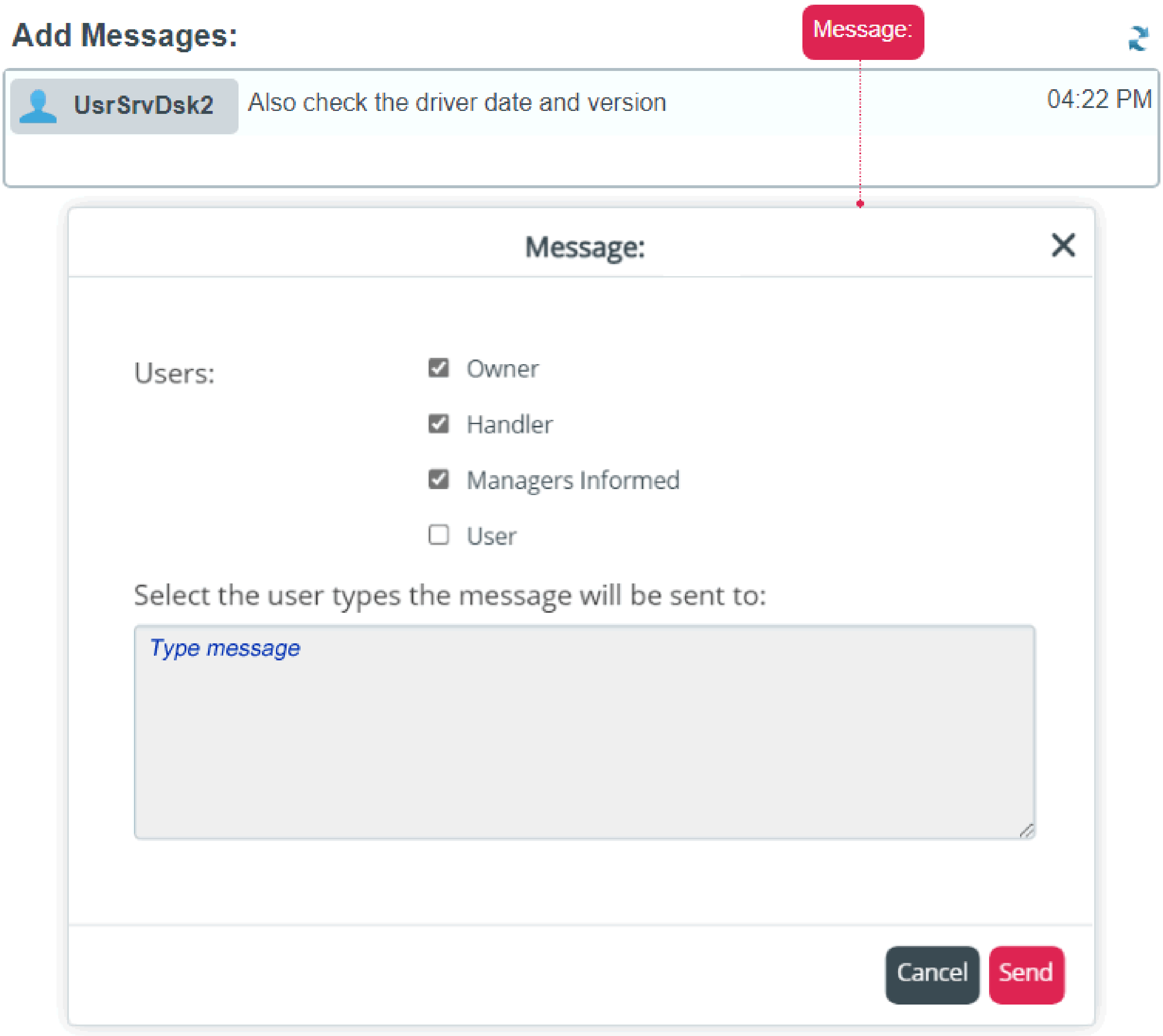
## 3.1 Add actions

In the **Attention** field enter the actions executed according to the current step. Click on or ENTER to save.

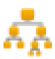


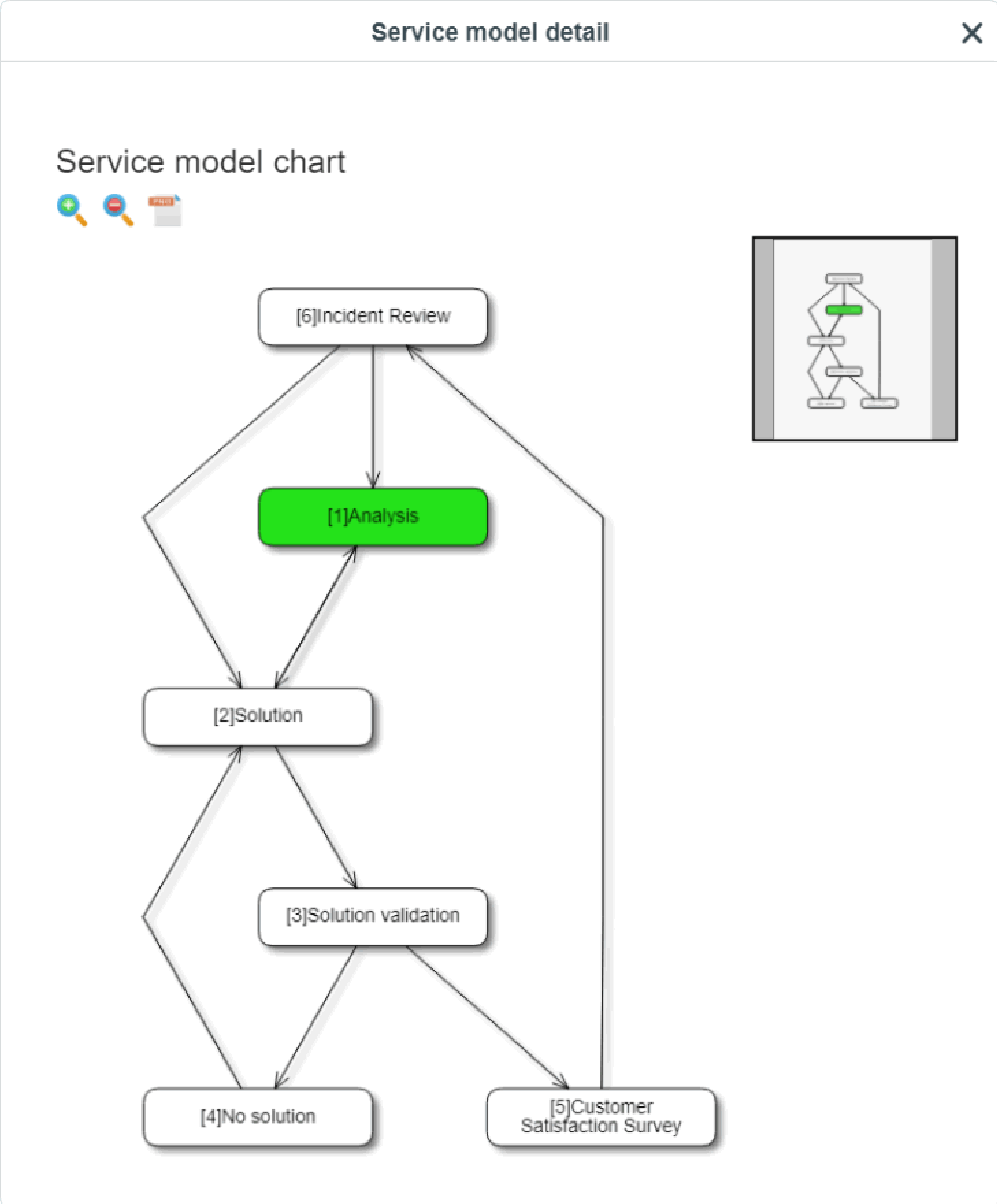

## 3.2 Add messages

Click on the **Message** button to open the *Message* window to select the users and type the message to send:

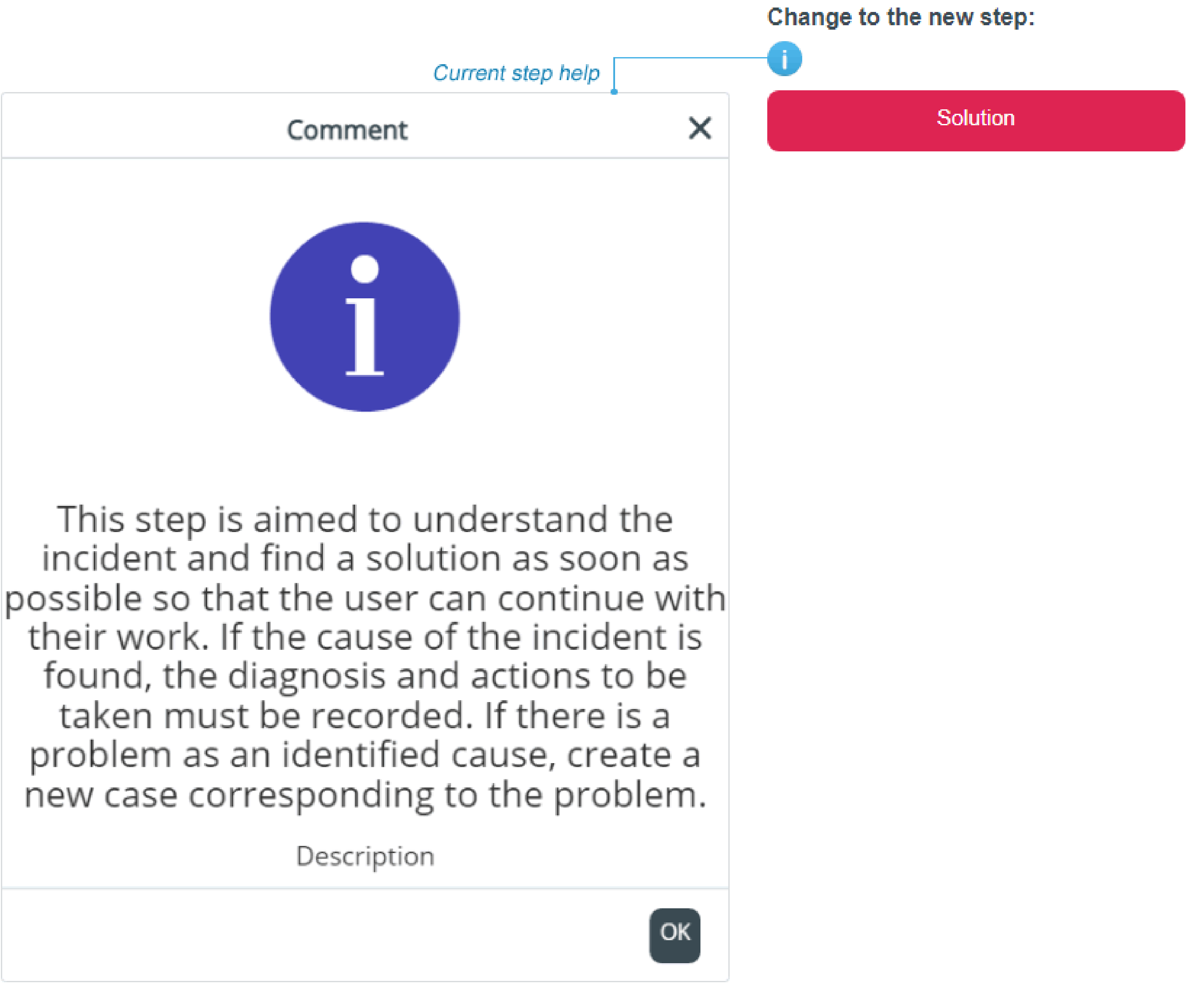



### 3.3 Attention guide

Click on  to graph the service model steps.




Click on info icon to display service instructions to help solving a case faster, these instructions are defined in the model configuration.




# 4. Case attention tools

## 4.1 See case detailed info

- **Case Information:** Click on **Case** button, it will open a window that includes 3 tabs: General information of the case, users/user type assigned to the case and graphic of the service model/user groups (by type). See Case tool
  ×
- **Workaround:** Click on the **Workaround** button to show the alternative solution(s) according to the category of the case. See Workaround tool (Knowledge base usage)
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- **User info:** Click on  button to display end user name and doble clic on the same button to open the user *Notification method* window. See End user info

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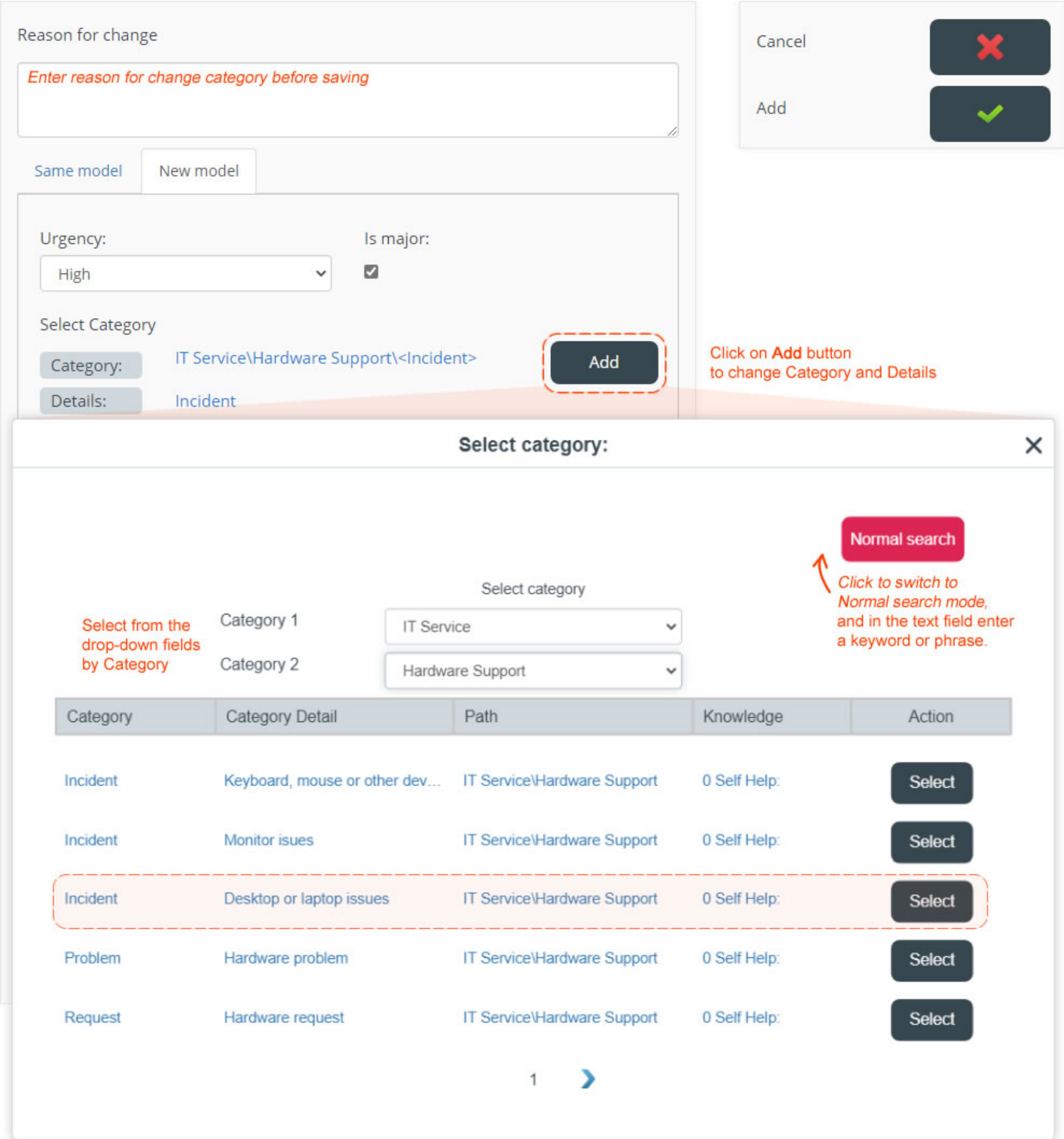
## 4.2 How to change case info

Click on **Category** button, it will open a window to modify the category, SLA (according to category and other criteria) and model, priority, urgency, title, description, etc. These changes can be made whithout changing the SLA/Model in the *Same model* tab or by changing the case model in *New model* tab.
See Category tool

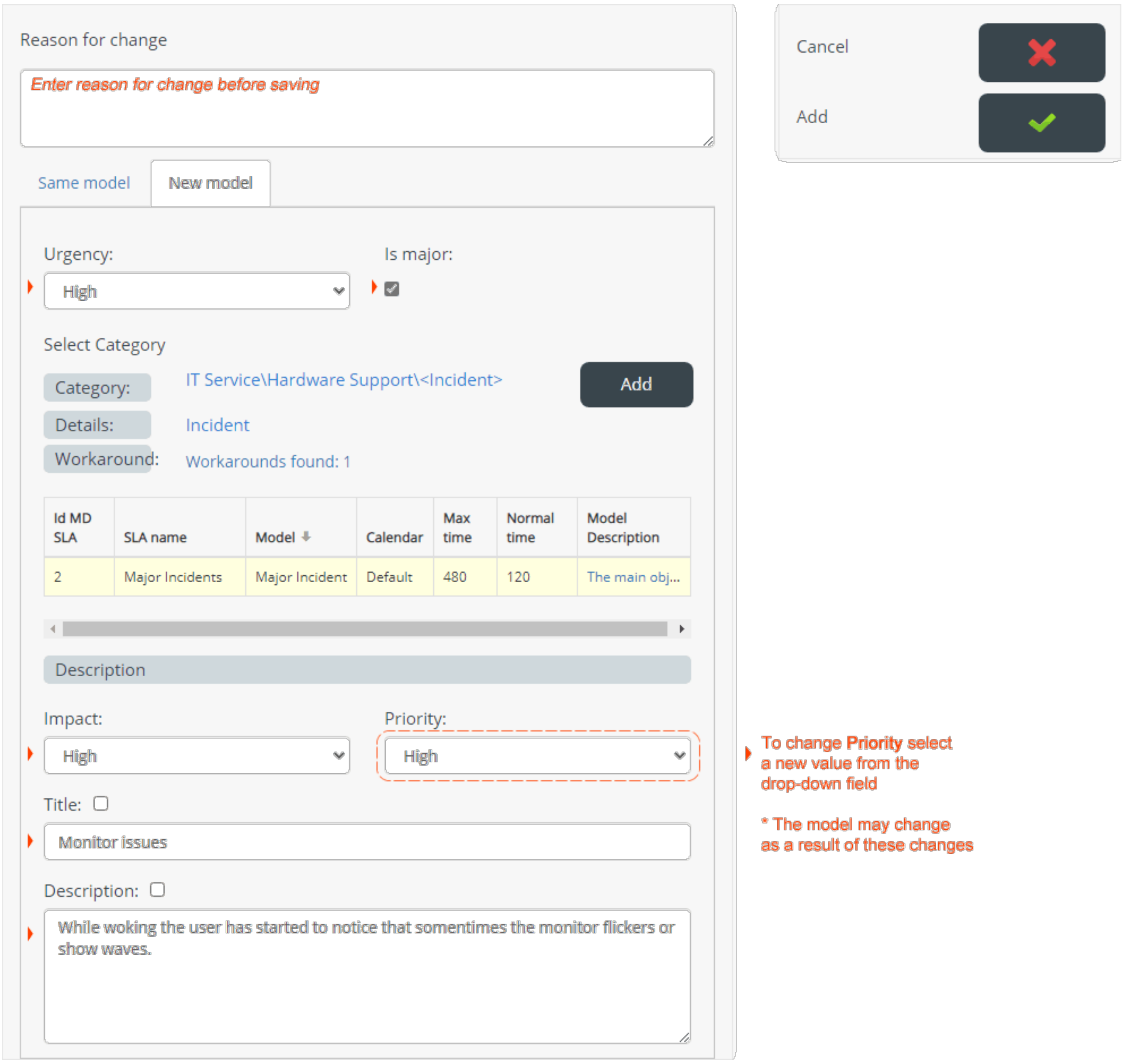
### 4.2.1 Change category

1. Click on the **Add** button (next to the Category and detail fields) to open the *category search* window.
2. Click on the **Select** button next to the category that most accurately describes the case reported.
3. Once the editing have finished, enter a reason for the change, to save click on the Add button.




# 4.2.2 Change priority

1. Select the new **Priority** value from the drop-down field.
2. Once the editing have finished, enter a reason for the change, to save click on the Add button.




## 4.3 Knowledge base usage

Click on the **Workaround** button to show the alternative solution(s) according to the category of the case. See Workaround tool (Knowledge base usage)

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## 4.4 How to escalatate a case

Tools to escalate the case in a **functional** or **hierarchical** way See Escalation tool

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- **Functional:** Click on the **Funtional** button to open the *escalation* window

- **Hierarchical:** Click on the **Hierarchical** button to open the *escalation* window

## 4.5 How to change case status

Case Status and how to change it

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1. Click on the **Status** button, the window to change the status will open, select the new status in the drop-down field.
2. *Optional.* Enter the cause of the change and click on **Change Status** button.

## 4.6 How add/delete CIs to a case

See How to use CI tool

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1. Click on the **CI** button to open the *CI Affected* window.
2. To add CIs to the case click **Add** button, the search window will open.
    1. Search CIs by criteria such as: CI Name, Brand, CI Type, etc.
    2. Or select from the complete list of CIs.

## 4.7 How to add/delete attachments

See How to use Attach file tool

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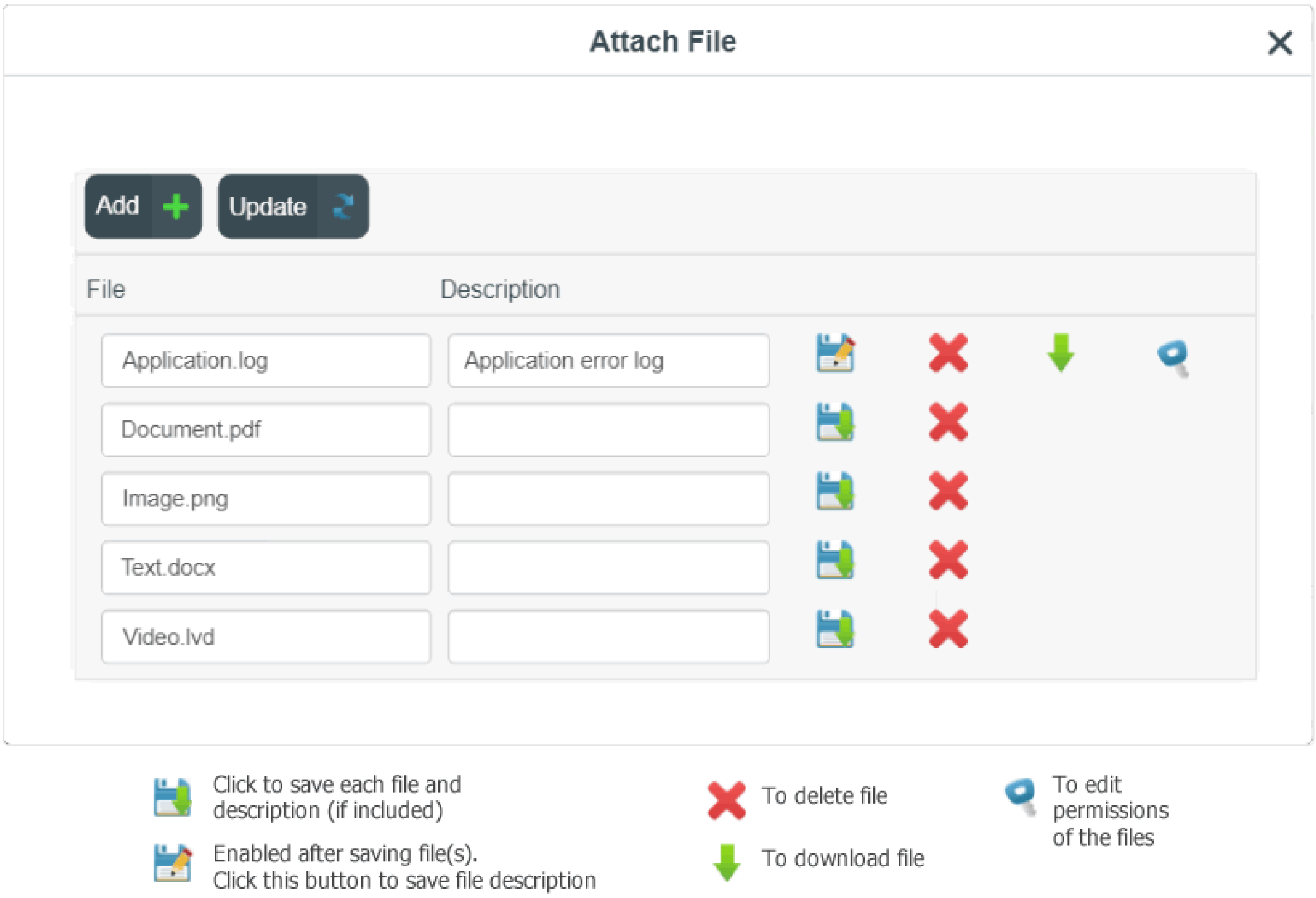
Click on the **Attach file** button, the window to add/edit attachments will open. Click on the Add button.
Single or multiple files can be attached.




# 4.8 How to link cases

See How to use link cases

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1. Click on the **Related Cases** button to open the window to edit relationships.
2. To add one or more related cases, click on the Add button to open the *Link case* window.
3. *Select Case to link:* Click on  to open the *Advanced search*
    1. Search filtering by *case number, category, category name, status, model, SLA, etc.*
    2. Or select a case from the full list.
4. After the case selection:
    1. Category will be autocompleted and fill in the fields:
    2. **Relationship type:** to define the type of relationship.
    3. Enter the **Title(Subject) and Description** of the relationship between cases.

| Relationship Type | Description |
|---|---|
| Unknown relation | There is no direct relationship between the cases, but they may share similarities that allow them to be related.<br>* This type of relationship is used just for information purposes. |
| This case is part of | There is a relationship between the cases, although the related case is not caused by the main case. |
| This case is the result of | The (related) case is caused by the main case.<br>Example:<br>Due to network problems (main case), a user does not have access to his email (related case). |

# 5. Add/Edit parent-child relationships

See How add/delete parent-child relationships

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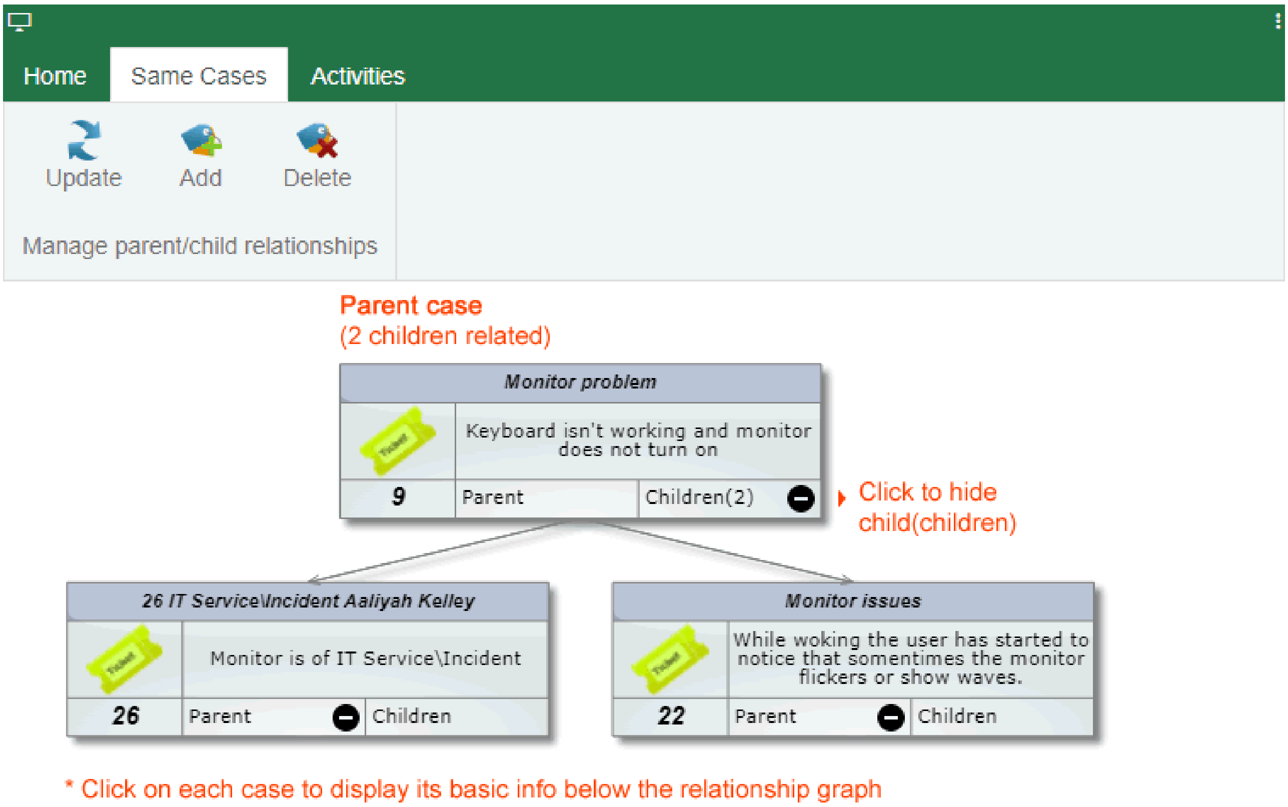
1. In the case attention window go to **Same Cases** tab.
2. Click on the **Add** button, the window to *add parent relationship* will open:

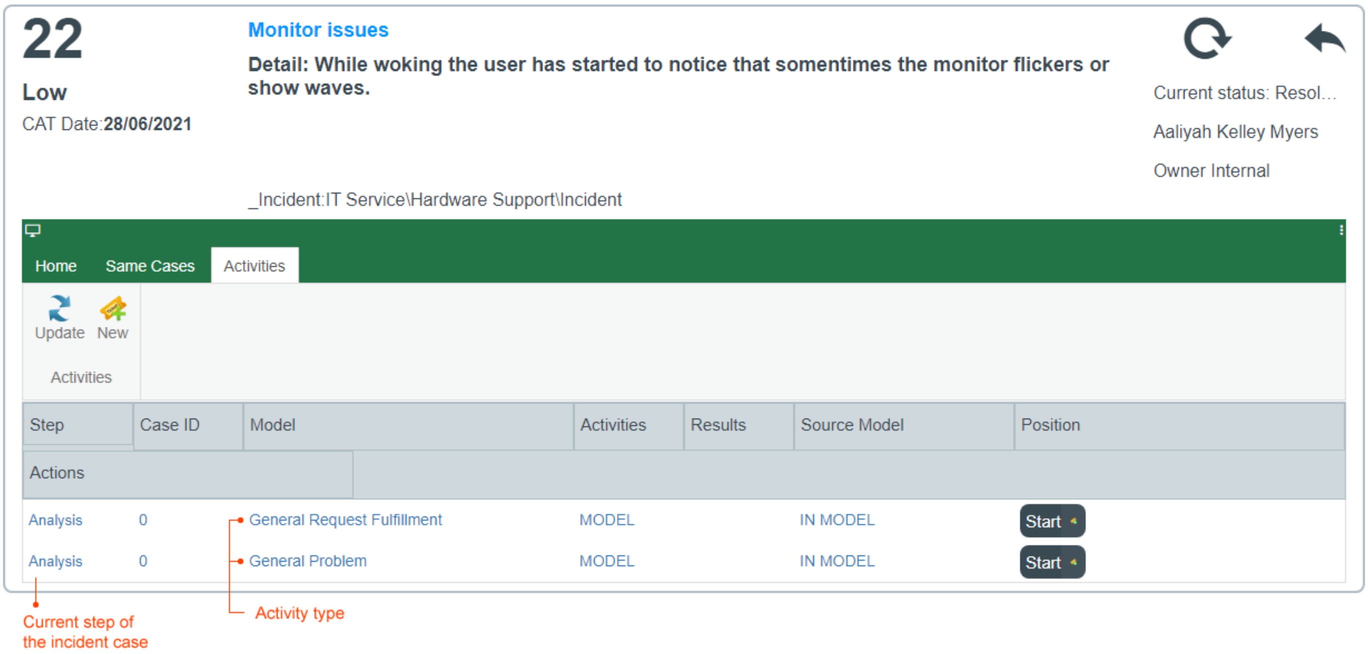
   Search for a case by criteria such as: *Case number, title, description, model, category, etc.*
   Or select from the complete list of cases (Show all).
   Select a record and click on the **Use selected record** button.

3. After adding the relationship, it can be graphed by clicking on the icon




# 6. Activities

ITHelpCenter is based on activities and service models, in those: steps, working groups, attention time, escalation type, possible results, among others are defined. While a new case is beign created, ITHC automatically decides which model and SLA will be assigned according to defined rules.
In the case attention window go to **Activities** tab:

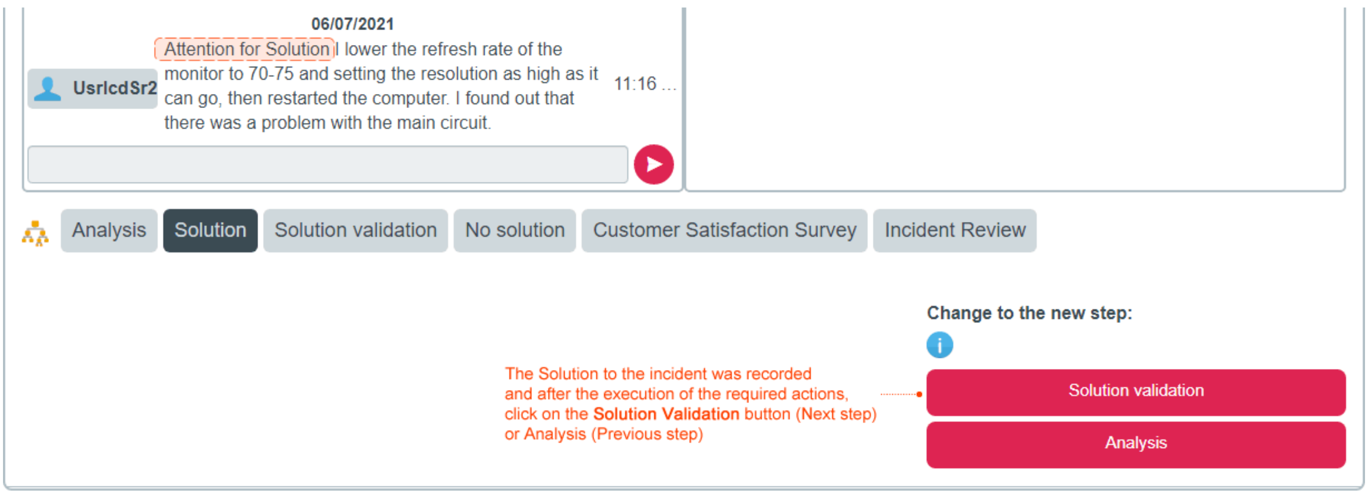



- See Create a new problem record from an incident
- See Create a new request record from an incident
- See Create a new RFC record from a problem

# 7. Change Step

After actions, messages and other tasks such as filling out forms(according to the model configuration) for the current step an advisor may change step.

Example
To change from **Solution** to **Solution Validation**



In the **Solution Validation** step it's verified with the end user whether the case is solved or not after implementing the solution. If the user determines that the case is satisfactorily resolved, the case will be redirected to the Customer Satisfaction Survey, if it's not resolved, the case is automatically returned to the Solution step.

**Important**

- Actions, executed tasks and messages are registered in the action log, see *Actions panel*.
- When the user determines that the case in resolved, the case new status will be **Resolved.**
  Case Status and how to change it
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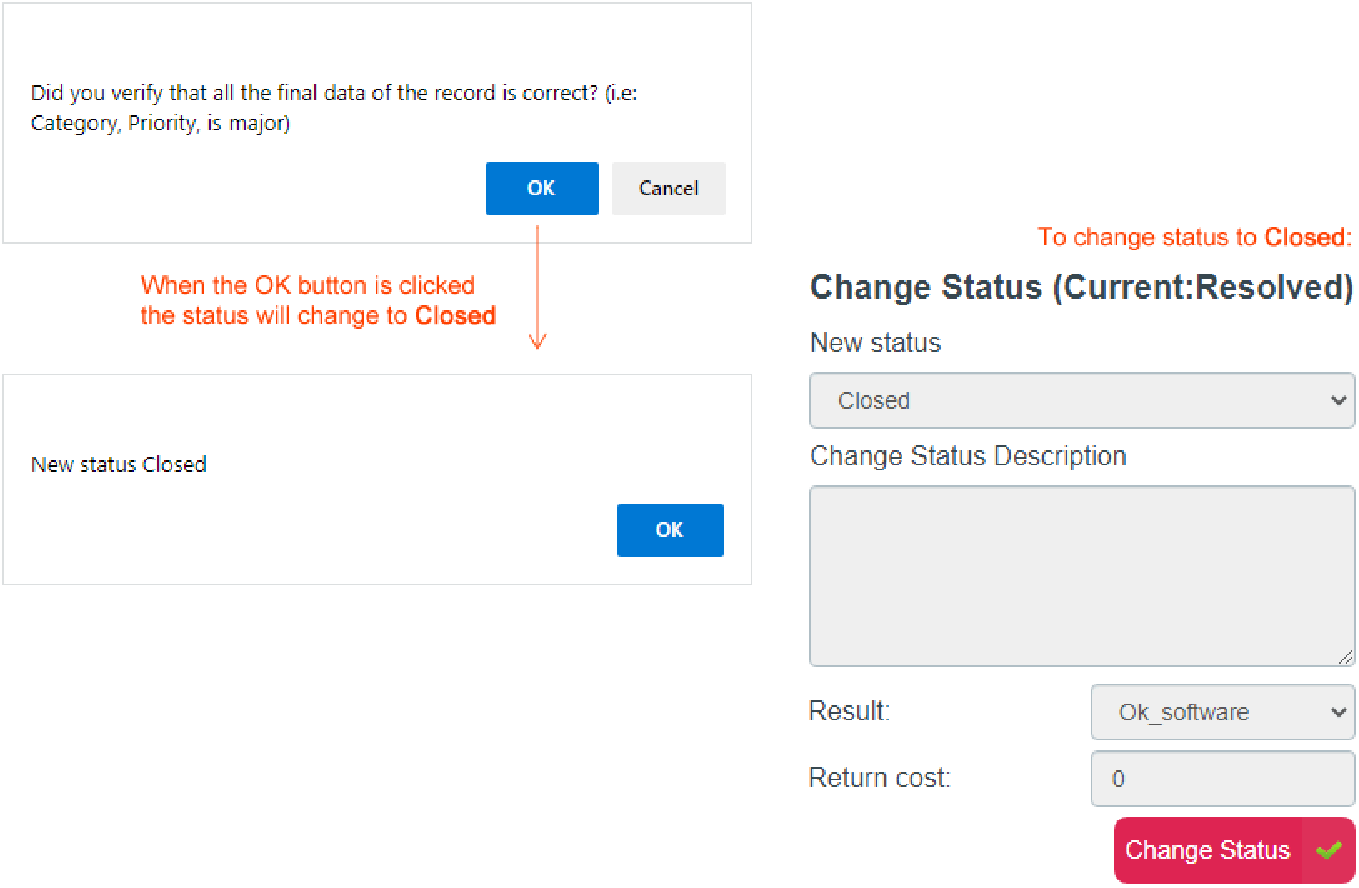
# 8. Closing case

- After the Customer Satisfaction Survey is sent by the end-user the case will be automatically redirected to the **Incident Review** step.
- In this step, the case owner reviews the solution and authorizes case closure.

A case can only be closed when the case is already in the last step of the model, where the **Closed** option will be available in the status drop-down field.
Optionally enter a closing comment and select from the list a *result* and *cost* of the solution.

Finally click on the **Change Status** button, a message will be displayed indicating if the category, priority, urgency (Is Major) of the case was verified before closing, when the **OK** button is clicked the status will change to **Closed**. See Category tool




[1] Assigned priority is the result of the calculation of urgency and impact

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