# How to create a new problem record

- 1. Log into the Atis portal
- In the left pane, click on Manager case > Set Case. Set Case is where you can review if there's a previous case reporting the same issue or record a new case. Below there's a description for each step of the process, each has it's own fields and purpouse.

# 1. Search by case or CI and create case

Once you clic on **Set Case**, a **Search screen** will open where you can search in the list of recorded cases or by CI.

icket Set							23
Case search	CI search						
All		🍀 📋	✔ Import				
Column		IDSDTIC	SOURCEM	TICKETSTA	TICKET_	TICKET_DESCRIPTION	
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		•					•
				_	SERVICED	ESK -	Þ

 $\checkmark$  Click on checkbox to list all recorded cases. Or search by **Column** and click on  $\checkmark$  to find coincidences.

Highlight a record and click on icon to see **Owner, User and Handler** of the case:

Owner: Case owner, first support contact.
 User: User who reported the issue.
 Handler: Functional, adviser.

|--|

×	Highlight a record	and click or	າ icon to	review the	e case reco	ord.
	Click on checkbox	to activate	data imp	oort from a	an existing	case.

See:

How to create a new incident case based upon a previous one

If you didn't find a previous case reporting the same issue, click on  $\checkmark$ 

to create a new case<sup>1)</sup>

#### New problem form

Select user :	ket number: 16								-
Description : Attachments   Information: Select a category Information: Select a category   Category : CI Affected   Detail : CI Affected   Urgency : Medium  Impact :    Priority :  Impact :	Select user :	Q	Method	of notice	e :			•	@
Information: Select a category   Category :   Detail :   Vrgency :   Medium →   Impact :   Priority :   Impact :	Description :		Attachn	nents					_
Title :   Title :   Information: Select a category   Category :   Detail :   CI Affected   Image: I		•	Name	file D	escriptio	n			
Title :   Title :   Information: Select a category   Category :   Detail :   CI Affected     Impact :   Priority :   Impact :     Impa									×
Title :  Information: Select a category Category : Detail :  Urgency : Medium ▼ Impact : ▼ Priority : ▼ Is Major: ♥		•							
Information: Select a category Category : Detail :	Title :								2
Information: Select a category   Category :   Detail :   CI Affected     NAME DEFINE SERIAL BRAND IDCI DESCRIPTION     Image: I		-							
Information: Select a category Category : Detail :		•							
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Urgency: Medium ▼ Impact: ▼ Priority: ▼ Is Major: ✓			NAME	DEFINE	SERIAL	BRAND	IDCI	DESCRIPTION	
Urgency : Medium ▼ Impact : ▼ Priority : ▼ Is Major: ✔									-8
Urgency : Medium ▼ Impact : ▼ Priority : ▼ Is Major: ✔									-
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						/ <	and a	<u> </u>	

### 2. Select User and notice method

Q

Select user : 1.

> Click on Version to search in the user's list, you can view all available users or search for an specific user.

Search					
Show : Search 🔹					
Select column to search : EMPLOYEENUMBER *					-
Search : 94					
IDCMDBUSER	IDATROLE	ROLENAME	IDCMDBCI	CI_GENERICNAME	Eľ
94	2	ADMIN	94	Usr 001	00
•					•
				× •	<

Select an user and clic on 🗸

2. Choose a prefered way of notice in the **Method of notice** dropdown list:

	eMail ( usr001@email.com )	
	Phone ( )	
	Mobile ( )	
	None	
Method of notice :	eMail ( usr001@email.com )	•

Once you've chosen the notice method, click on . A popup screen allows you to edit contact details:

Last update:	operschivedendministratoresconte problem http://www.leverit.com/itbelpconter/enerschivedendministratoresconte.problem
2021/06/17 16:31	enarchived.auministrator.create_problem http://www.levent.com/theptenter/enarchived.auministrator.create_problem

C	MDB Contact						
	Contact type:				Informatio	on:	
				-	(+ )	-	
	Type name	Contact	defined				1
	eMail	usr001@	email.com				X
	Mobile	(+57) 1-	3212347896				
	Street	Address:					
		City :	Colombia				-
	Province/State/	County :					
	7. (2. 1						
	Zip/Post	al Code :					
	System	status :	Live				-
			Prep				
			Live				
			Retired				

Contact type	Select the notice type (mobile, phone, email)
Information	Type according to notice type: mobile/phone/email and click $\boxtimes$ to add.
Address	Other contact details like Address, country, county/state and zipcode
System status	Select system status: <b>Prep:</b> Pending for aprobation <b>Live: Active</b> <b>Retired:</b> Outdated info

#### 3. Set case details

In this part of the form the administrator can include: description and title, category, urgency, impact and priority of the case:

	Description of the reported issue. Relevant informa issue, consequences of the event, etc. Description :	tion to include in this field: frequency of occurrence of the issue, event that triggers the
Description	The multi-function does not print in black although both cartridges are new. And several times prints an alignment test page at each boot.	• •
Title	Title : Multi-function printer unable to print in black	•

	This screen allows you to categorize the case, search the category that best describes the issue. Once you choose the category, the system will find related <b>Workarounds</b> and automatically sets <b>Models</b> and <b>SLAs</b> that address the reported issue and helps to resolve the case faster.
	Click on icon 🔨 to open the search category screen. Search by category or coincidence:
	Category Search
	Search by Coincidence
	Search by Concidence
	Column CATEGORY1 - Print Q All
	CATEGORY CATEGORYSTATUS
	Printing Service\Unknown\ <failing> 1</failing>
	Printing Service\Unknown\ <problem> 1</problem>
	Printing Service\Unknown\ <request>     1       Diction Conviction\Unknown\<request>     1</request></request>
	Printing Service\Unknown\ <change> 1</change>
	× ×
	Select an user and alia an a
	Information: Select a category
	Detail : Problem
	3 Problem_general Problem_general Default 2880 720
	4 Problem_Major Problem_Major Default 720 360
	SLA
Category	
	Click on 📕 to search for workaround records.
	Workaround 23
	Workaround :
	Click to search
	a Workaround
	Search
	Show : Search *
	Select column to search : (ALL)
	Show Print
	Drag a column header here to group by that colum
	▶ 20, 20, 20, Printer model: H562434D K P 0 1 3 2 F 1 1 9 -
	Does not print in black
	200
	See.
	Create a new Knownerror
	Create a new Workaround

	These fie	ds indicate how critical this case is for your company and how affects operation.
	Urgency	is how soon the issue must be fixed so it wont affect normal company operations.
	Urgency :	Medium
		High
		Medium
		low
	Impact is	how big the effects of the reported issue will be. Impact is automatically filled when the SLA is set.
Impact	Impact :	High
Priority		High
		Medium
		low
	Priority	s calculated based upon urgency and impact. Select Urgency and Impact and Priority will be calculated
	Priority :	High
		High
		Medium
		low
	Click on o	heckbox to indicate if the problem is important.
ls Major	Is Mayor:	$\checkmark$
ls Major	Click on o	Medium low heckbox to indicate if the problem is important.

#### 4. Add Attachment

Here you can add relevant attachments to an incident:

Attachments		
Name file	Description	
		×
		2

	To add attachments to the case, clic on a popup screen allows you to browse your computer for the files to attach. You can include a description for each attached file. File
	image1.bmp
Add File	Error image
	Click on <u>to find the file add description<sup>2)</sup> and click on to save</u>
	Select the attachment and click on $$ to edit file description and click on $\checkmark$ to save.
	Description 23
	MONITOR
Edit description	PRINTER MODEL H562434D
Delete File	Select attachment and click on 🗼
Download File	Select attachment and click on 🧀

#### 5. Add Cl

Here you can relate CIs to an incident:

#### CI Affected





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Select CI and click on 📕 to edit description and click on < to save.					
Description 🛛					
MONITOR					
PRINTER MODEL H562434D					
Salast CL and slick an					
Select CI and click on A popup screen allows you to view information and relations of the CI See:					

# 6. Create problem

If you've done setting the problem information:

Last update: 2021/06/17 16:31	en:archived:administrator:create_problem http://www.leverit.com/ithelpcenter/en:archived:administrator:create_problem
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ket number:	28								-
Select user : Usr 001			Method of notice : eMail ( usr001@email.com ) -					@	
Description	:			Attachments	-				
The multi-function does not print in black although both cartridges are new. And several times prints an alignment test page at each boot			•	Name file	Descriptio	on			
Title : Multi-functio	Fitle : Multi-function printer unable to print in black								2
Information: Category : Detail : Prob	Select a category \Printing ServiceUr lem Arrown Count 0	1known <problem></problem>	Q	CI Affected					
	SLANAME	TITLEM	MAYTI		DEFINE	SERIAL	BRAND	IDCI	
3	Problem general	Problem general	2880	PRINTER US	PRINTER	000215	ΠP	215	
4	Problem_Major	Problem_Major	720						<b>.</b> ₽
Urgency : High - Impact : Medium -									
Priority : Ma Is Major: 🗸	edium 👻			•	ſ	7. 4		,	
					- U	/ 🎸	<b>*</b>	$\mathbf{\mathbf{v}}$	/

	Click on 🗵 to create the incident record.
Create case	The new record is created and the system will assign an unique case ID:
	×
Cancel case	Click on 🗵 to cancel
Quit case	Click on 🗵 to quit
	Click on 🗵
Minimize form	When the form window is minimized, the icon $\bowtie$ with the case number will show in the top left corner of the main window, click on icon to restore the form.

Click on  $\bowtie$  to open **Case template** window, you can choose an existing case template for quick creation of a new case.

#### Quick creation menu

See Quick ways to create a new case

1)

Ticket 2) Optional

> From: http://www.leverit.com/ithelpcenter/ - **IT Help Center**

Permanent link: http://www.leverit.com/ithelpcenter/en:archived:administrator:create\_problem

Last update: 2021/06/17 16:31

