How to create a new problem record

1. Log into the **Atis portal**

2. 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.

 Click on checkbox to list all recorded cases. Or search by **Column** and click on 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 on icon to review the case record.

Click on checkbox to activate data import from 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 to create a new case[1]

New problem form
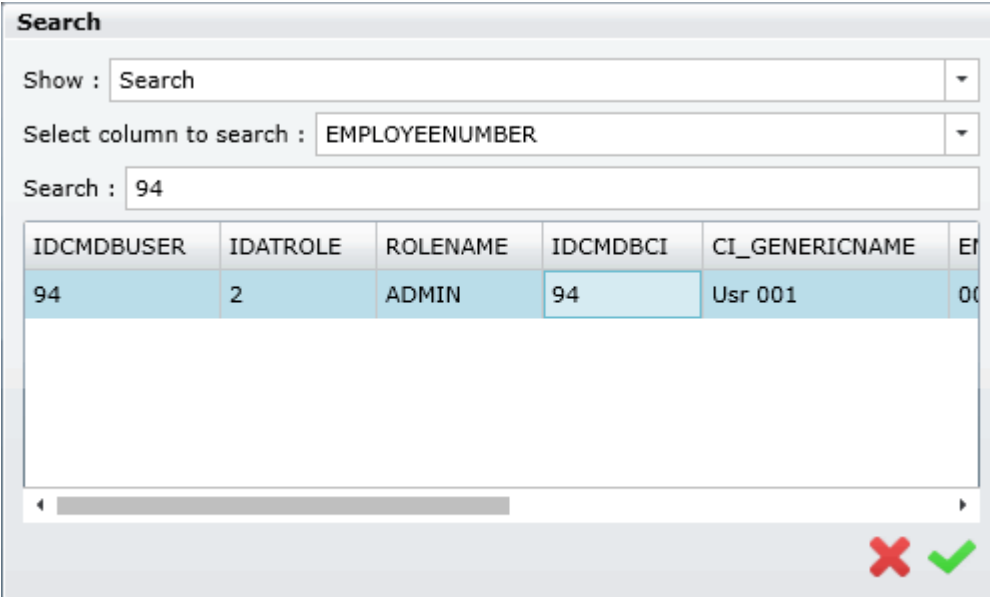
2. Select User and notice method

1.

Select user :

Click on 🔍 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	EI
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:

Method of notice : eMail (usr001@email.com)

None
Mobile ( )
Phone ( )
eMail (usr001@email.com)

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

Contact type	Select the notice type (mobile, phone, email)
Information	Type according to notice type: mobile/phone/email and click [x] to add.
Address	Other contact details like Address, country, county/state and zipcode
System status	Select system status: **Prep:** Pending for aprobation **Live: Active** **Retired:** Outdated info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	Description of the reported issue. Relevant information to include in this field: frequency of occurrence of the issue, event that triggers the issue, consequences of the event, etc. 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

Category	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 **Workarounds** and automatically sets **Models** and **SLAs** 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 Column CATEGORY1 ▾ Print 🔍 ☐ All CATEGORY / CATEGORYSTATUS Printing Service\Unknown\<Failing> / 1 Printing Service\Unknown\<Problem> / 1 Printing Service\Unknown\<Request> / 1 Printing Service\Unknown\<Change> / 1 ✖ ✔ Select an user and clic on ✔ Information: Select a category Category : ..\Printing Service\Unknown\<Problem> Detail : Problem Problem categorization 🔍 📘 WorkArrown Count 0 IDMDSLA / SLANAME / TITLEM / DATENAME / MAXTIME / NORM 3 / Problem_general / Problem_general / Default / 2880 / 720 4 / Problem_Major / Problem_Major / Default / 720 / 360 SLA Click on 📘 to search for workaround records. **Workaround** 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 CI_ CI_ CI_ CI_DESCRIPTION C C C I I I C C C I I I ▸ 20, 20, 20, Printer model: H562434D Does not print in black K P 0 1 3 2 F 1 1 9 ✔ ✖ See: Create a new Knownerror Create a new Workaround

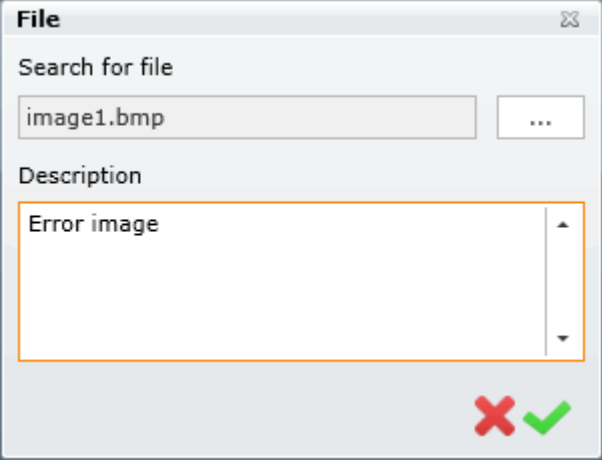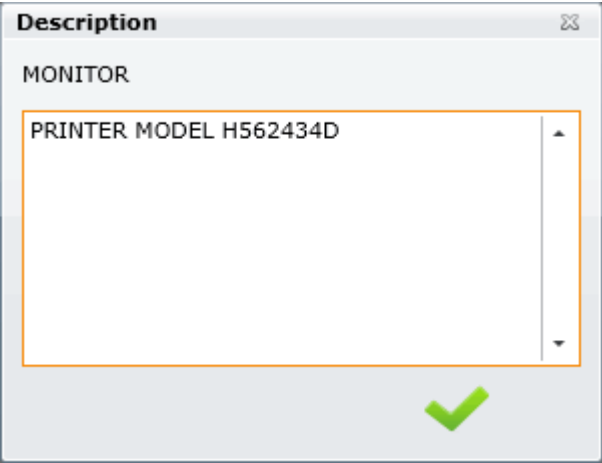|	These fields indicate how critical this case is for your company and how affects operation.
Urgency Impact Priority	**Urgency** is how soon the issue must be fixed so it wont affect normal company operations. Urgency : Medium High Medium low **Impact** is how big the effects of the reported issue will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

4. Add Attachment

Here you can add relevant attachments to an incident:

Attachments

Name file	Description	

Add File	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. Click on [...] to find the file, add description[2)] and click on ✔ to save.
Edit description	Select the attachment and click on to edit file description and click on ✔ to save.
Delete File	Select attachment and click on
Download File	Select attachment and click on

5. Add CI

Here you can relate CIs to an incident:

CI Affected

NAME	DEFINE	SERIAL	BRAND	IDCI	DESCRIPTION

CI Affected

NAME	DEFINE	SERIAL	BRAND	IDCI	DESCRIPTION

Add CI

To add affected CIs to an incident, click on a popup screen allows you to browse for CIs.
View all or search for a specific CI.
Filter by column, drag a column header to group

Select a CI and click on to add.

Edit CI description	Select CI and click on to edit description and click on to save.
Delete CI	Select CI and click on
View CI	Select CI and click on A popup screen allows you to view information and relations of the CI See: How to view CI Information and relations

6. Create problem

If you've done setting the problem information:

	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 ⊠ with the case number will show in the top left corner of the main window, click on icon to restore the form.

Click on 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

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