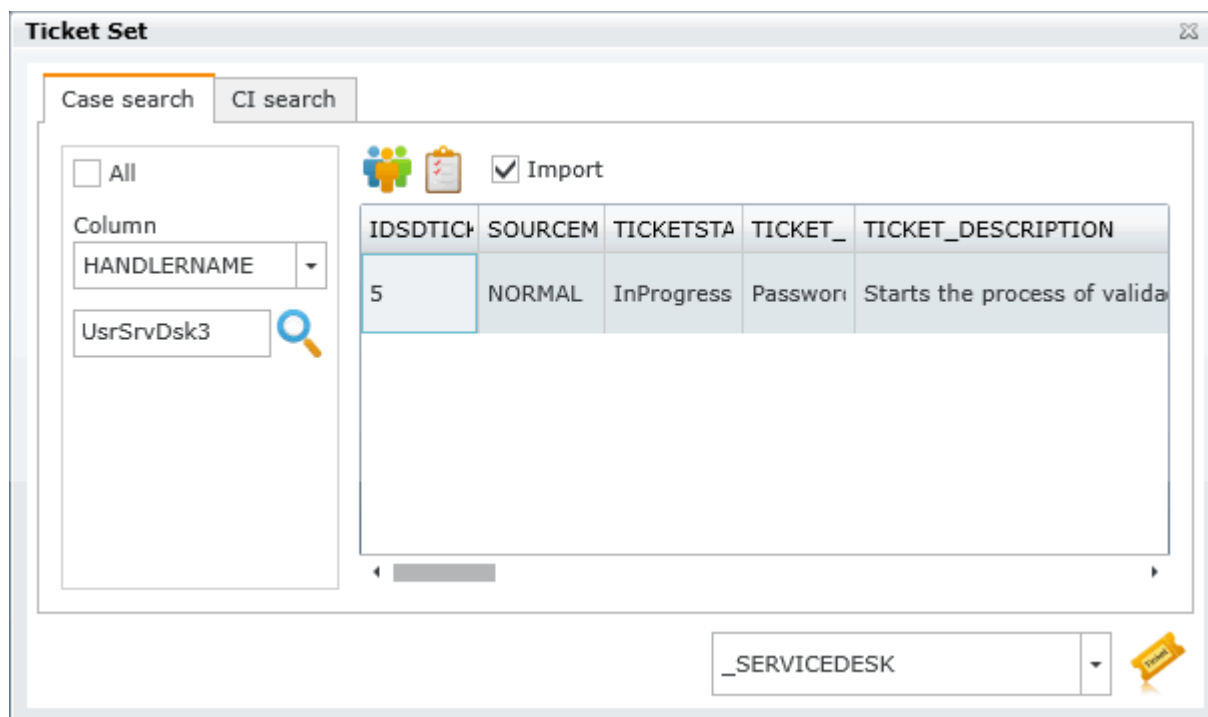


How to create a new incident record

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 purpose.

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 case¹⁾

New incident case form

Ticket number: 16


Select user :  Method of notice : 

Description :

Title :

Information: Select a category

Category :

Detail : 

Urgency : Impact :

Priority :






Is Major:

Attachments

Name file	Description
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CI Affected

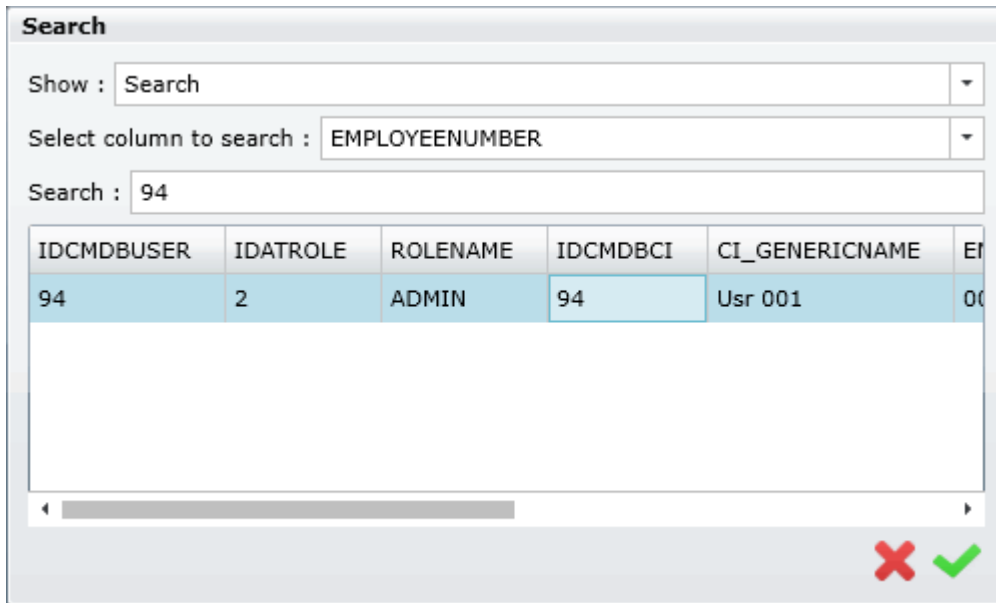
NAME	DEFINE	SERIAL	BRAND	IDCI	DESCRIPTION
------	--------	--------	-------	------	-------------

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.




The search dialog box contains the following fields and table:

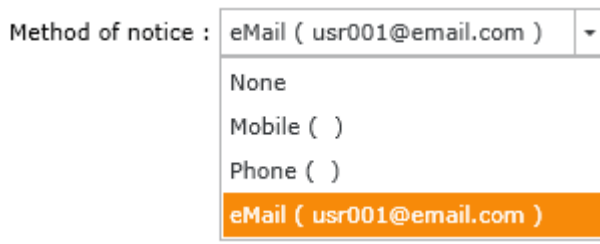
- Show : Search
- Select column to search : EMPLOYEEENUMBER
- Search : 94

IDCMBUSER	IDATROLE	ROLENAME	IDCMDBCI	CI_GENERICNAME	EM
94	2	ADMIN	94	Usr 001	00

- Buttons:  

Select an user and clic on 

2. Choose a preferred 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:

CMDB Contact

Contact type: Information: (+) - 

Type name	Contact defined	
eMail	usr001@email.com	
Mobile	(+57) 1-3212347896	

Street Address:

City :

Province/State/County :


Zip/Postal Code :

System status :

Prep

Live

Retired


- Contact type** Select the notice type (mobile, phone, email)
- Information** Type according to notice type: mobile/phone/email and click  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 : <input data-bbox="240 203 683 297" type="text" value="While working the user have started to notice that sometimes the monitor flickers or shows waves"/>
Title	Title : <input data-bbox="240 349 683 398" type="text" value="Monitor Failing"/>

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:

Column:  All


CATEGORY	CATEGORYSTATUS
Desktop Support Service\Hardware\<Failing>	1
Desktop Support Service\Hardware\<Problem>	1
Desktop Support Service\Hardware\<Request>	1
Desktop Support Service\Hardware\<Change>	1


 

Select an user and clic on 

Information: Select a category

Category : ..\Desktop Support Service\Hardware\<Failing>

Detail : Failing 

 WorkArrow Count 0

IDMDSLA	SLANAME	TITLEM	DATENAME	MAXTIME	NORM
1	Incident_general	Incident_general	Default	480	120
2	Incident_Major	Incident_Major	Default	480	120


SLA

Category

Click on  to search for workaround records.

Workaround

Workaround :

Click to search a Workaround 



Search



Show :

Select column to search :

Show

Drag a column header here to group by that column

CI_	CI_	CI_	CI_DESCRIPTION	C	C	C	II	II	II	C	C	C	II	II	II
20	20	20	Monitor color issue	W	P	0	1	4	2	M	Fr	1	3	1	1

See:
[Create a new Knownerror](#)
[Create a new Workaround](#)


Urgency Impact Priority	<p>These fields indicate how critical this case is for your company and how affects operation.</p> <p>Urgency is how soon the issue must be fixed so it wont affect normal company operations.</p> <p>Urgency : <input type="text" value="Medium"/></p> <ul style="list-style-type: none">HighMediumlow <p>Impact is how big the effects of the reported issue will be. <i>Impact</i> is automatically filled when the SLA is set.</p> <p>Impact : <input type="text" value="High"/></p> <ul style="list-style-type: none">HighMediumlow <p>Priority is calculated based upon urgency and impact. Select Urgency and Impact and Priority will be calculated</p> <p>Priority : <input type="text" value="High"/></p> <ul style="list-style-type: none">HighMediumlow
Is Major	<p>Click on checkbox to indicate if the problem is important.</p> <p>Is Mayor: <input checked="" type="checkbox"/></p>


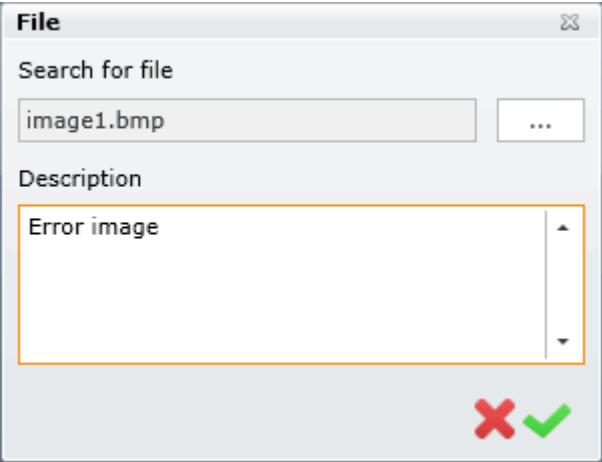




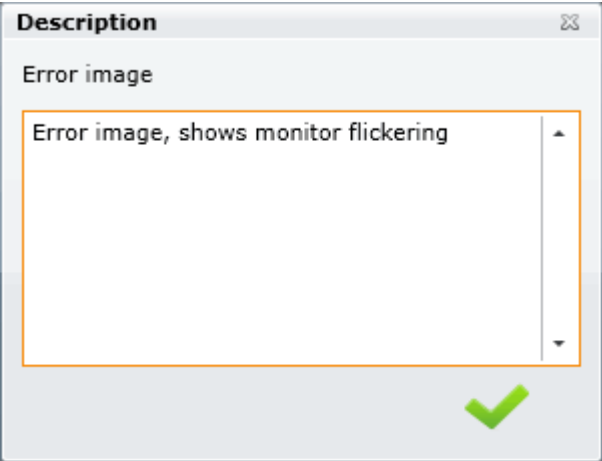


4. Add Attachment

Here you can add relevant attachments to an incident:

Attachments

Name file	Description
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<p>Add File</p>	<p>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.</p> <div data-bbox="363 293 967 752">  </div> <p>Click on  to find the file, add description²⁾ and click on  to save.</p>
<p>Edit description</p>	<p>Select the attachment and click on  to edit file description and click on  to save.</p> <div data-bbox="363 983 967 1442">  </div>
<p>Delete File</p>	<p>Select attachment and click on </p>
<p>Download File</p>	<p>Select attachment and click on </p>


5. Add CI

Here you can relate CIs to an incident:

CI Affected

NAME	DEFINE	SERIAL	BRAND	IDCI	DESCRIPTION



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

Search

Show :

Select column to search :

Show :

Drag a column header here to group by that column

IDCMDBCI	CI_GENERICNAME	IDCMDBBR	BRAND	IDCMDBCID	CIDEFINE_NAME
95	Router 01	12	CISCO	2	DEVICE
96	Router 02	12	CISCO	2	DEVICE
101	PC 099	6	DELL	2	DEVICE
102	PC 098	6	DELL	2	DEVICE








Add CI

Search

Show :

IDCMDBCI	CI_GENERICNAME	IDCMDI	BRAND	IDCMDI	CIDEFINE_NAME
⊕ CI_GENERICNAME: LC Corporate					
⊕ CI_GENERICNAME: LC Factory					
⊖ CI_GENERICNAME: MONITOR					
213	MONITOR	1	None	2	DEVICE
⊕ CI_GENERICNAME: PC 001					
⊕ CI_GENERICNAME: PC 002					
⊕ CI_GENERICNAME: PC 003					
⊕ CI_GENERICNAME: PC 004					
⊕ CI_GENERICNAME: PC 005					

Select a CI and click on  to add.

Edit CI description	<p>Select CI and click on  to edit description and click on  to save.</p> <div data-bbox="320 219 927 680"><p>Description ✖</p><p>MONITOR</p><p>Brand: MonitorIn</p></div>
Delete CI	<p>Select CI and click on </p>
View CI	<p>Select CI and click on </p> <p>A popup screen allows you to view information and relations of the CI</p> <p>See: How to view CI Information and relations</p>

6. Create incident

If you've done setting the incident information:

Ticket number: 16

Select user : Usr 001

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

Description :

While working the user has started to notice that sometimes the monitor flickers or shows waves

Attachments

Name file	Description
image1.bmp	Error image, shows monitor flickering

Title :

Monitor failing

Information: Select a category

Category : ..\Desktop Support ServiceHardware<Failing>

Detail : Failing

WorkArrown Count 0

IDMDSLA	SLANAME	TITL	MAXTIME	NORM
1	Incident_general	Incid	480	120
2	Incident_Major	Incid	480	120


CI Affected

NAME	DEFINE	SERIAL	DESCRIPTION
MONITOR	DEVICE	MONSGD67	Brand: MonitorIn


Urgency : Medium Impact : High

Priority : High

Is Major:



Create case

Click on  to create the incident record.
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

Minimize form

Click on 
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 incident record](#)

1)

Ticket

2)

Optional

From:

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

Permanent link:

http://www.leverit.com/ithelpcenter/en:archived:administrator:set_case

Last update: **2021/06/17 16:34**

