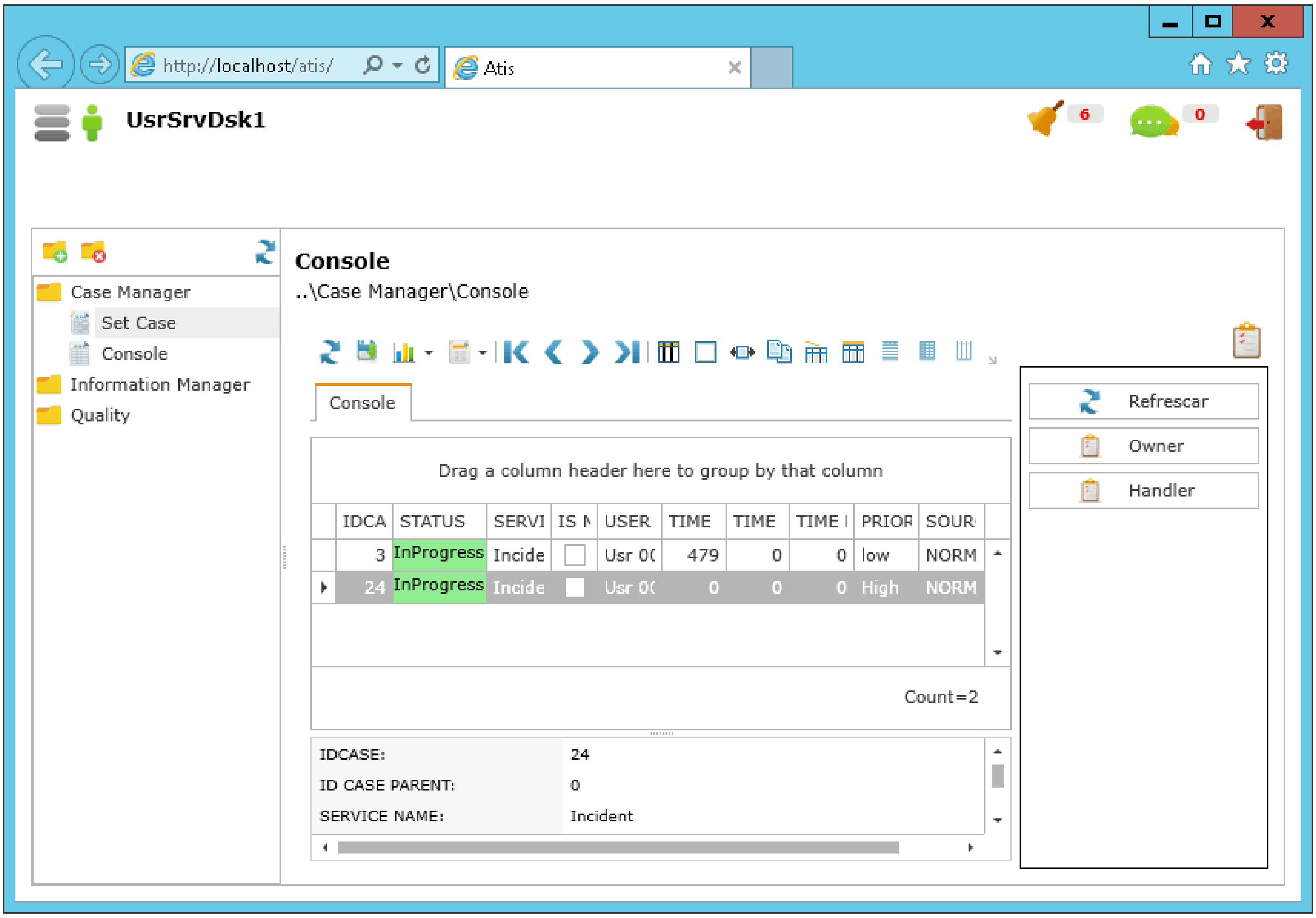
How to solve an Incident

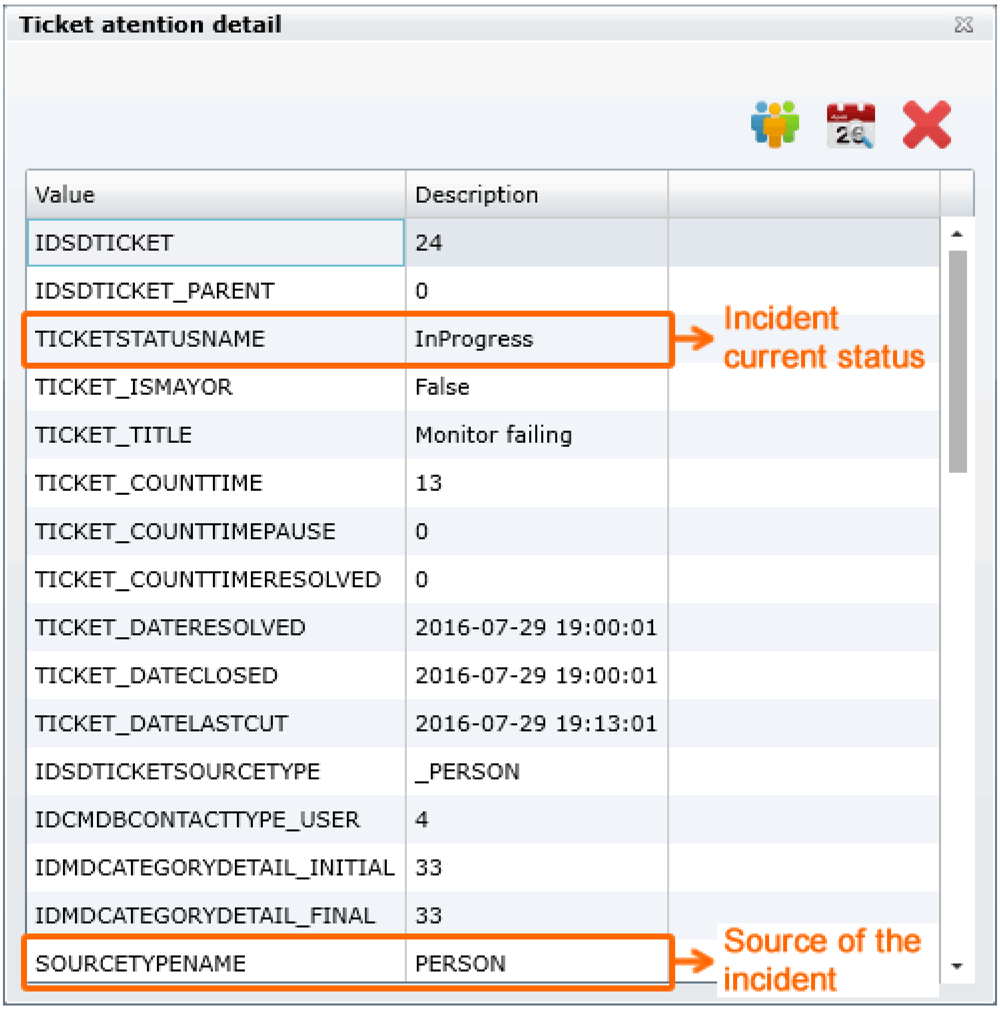
Log into the Atis portal

In the left pane, click on **Manager case > Console.**



1. View incident source and detailed data

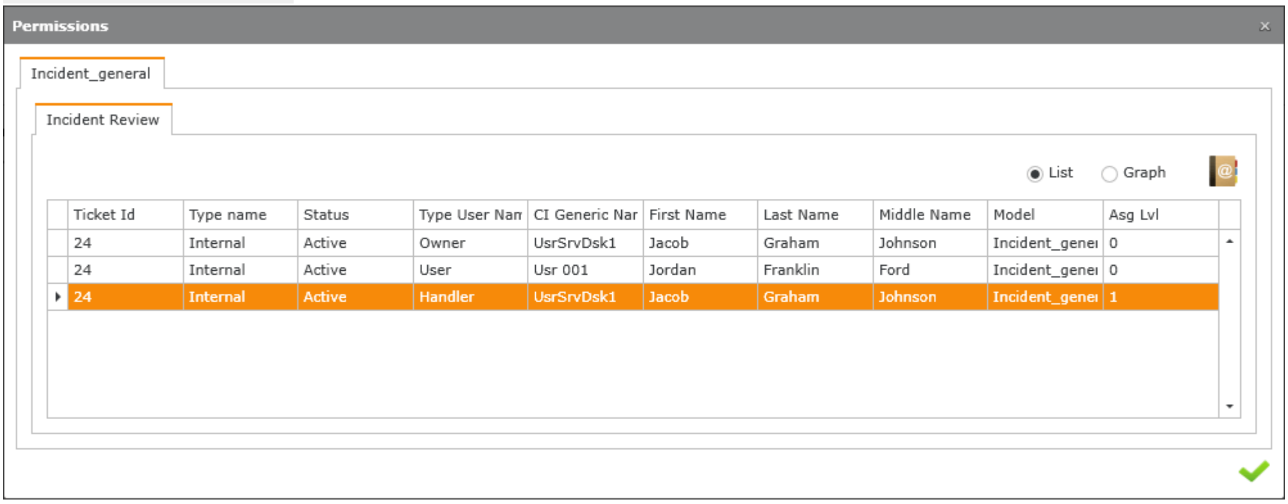
In the list of assigned cases, select an incident and click on  to see the detailed data of the incident.



Value	Description
IDSDTICKET	24
IDSDTICKET_PARENT	0
TICKETSTATUSNAME	InProgress
TICKET_ISMAYOR	False
TICKET_TITLE	Monitor failing
TICKET_COUNTTIME	13
TICKET_COUNTTIMEPAUSE	0
TICKET_COUNTTIMERESOLVED	0
TICKET_DATERESOLVED	2016-07-29 19:00:01
TICKET_DATECLOSED	2016-07-29 19:00:01
TICKET_DATELASTCUT	2016-07-29 19:13:01
IDSDTICKETSOURCETYPE	_PERSON
IDCMDBCONTACTTYPE_USER	4
IDMDCATEGORYDETAIL_INITIAL	33
IDMDCATEGORYDETAIL_FINAL	33
SOURCETYPENAME	PERSON

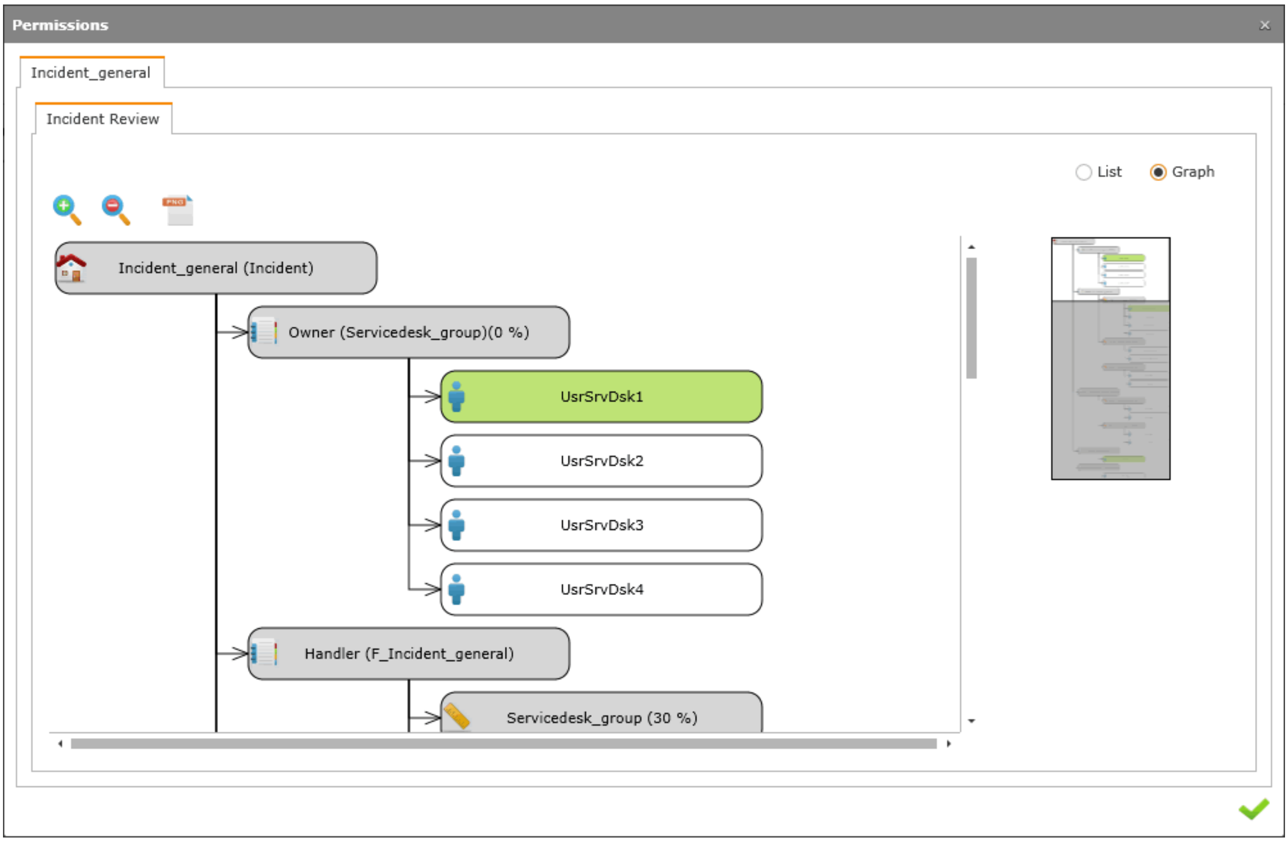
- Click on  to Owner,Handler and User of the incident:

  Permissions: List view

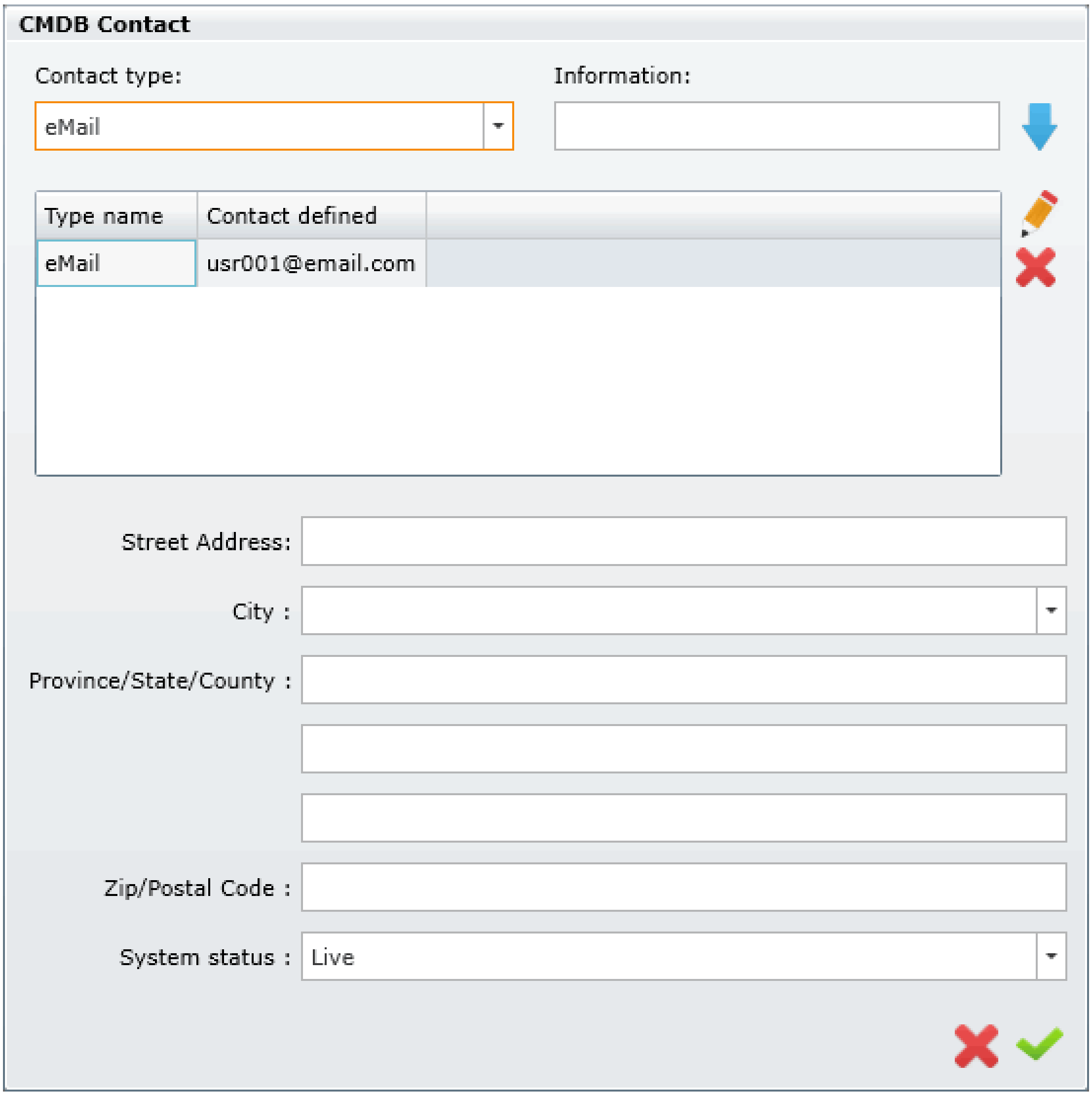


Ticket Id	Type name	Status	Type User Nan	CI Generic Nar	First Name	Last Name	Middle Name	Model	Asg Lvl
24	Internal	Active	Owner	UsrSrvDsk1	Jacob	Graham	Johnson	Incident_genei	0
24	Internal	Active	User	Usr 001	Jordan	Franklin	Ford	Incident_genei	0
24	Internal	Active	Handler	UsrSrvDsk1	Jacob	Graham	Johnson	Incident_genei	1

Permissions: Graph

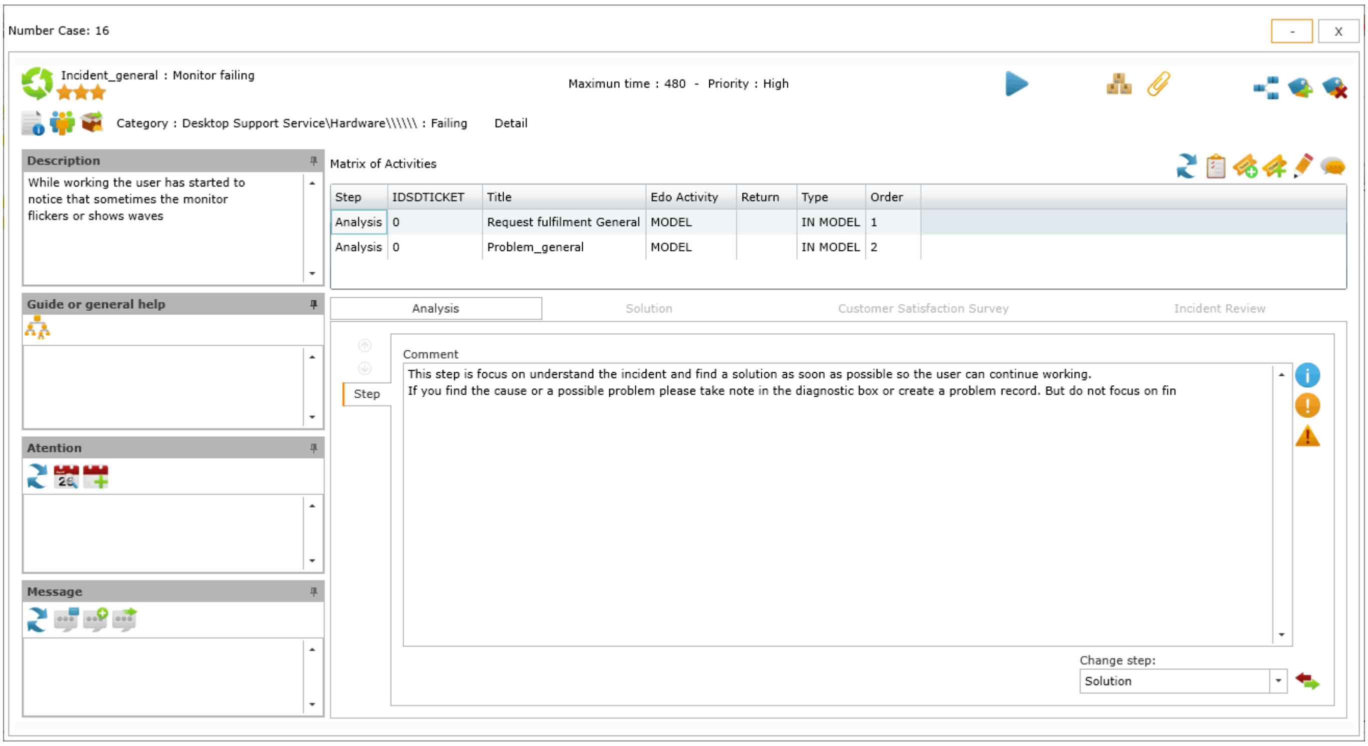


- Click on  to see the log of actions
- In the permissions screen, click on  to see contact data of the user:



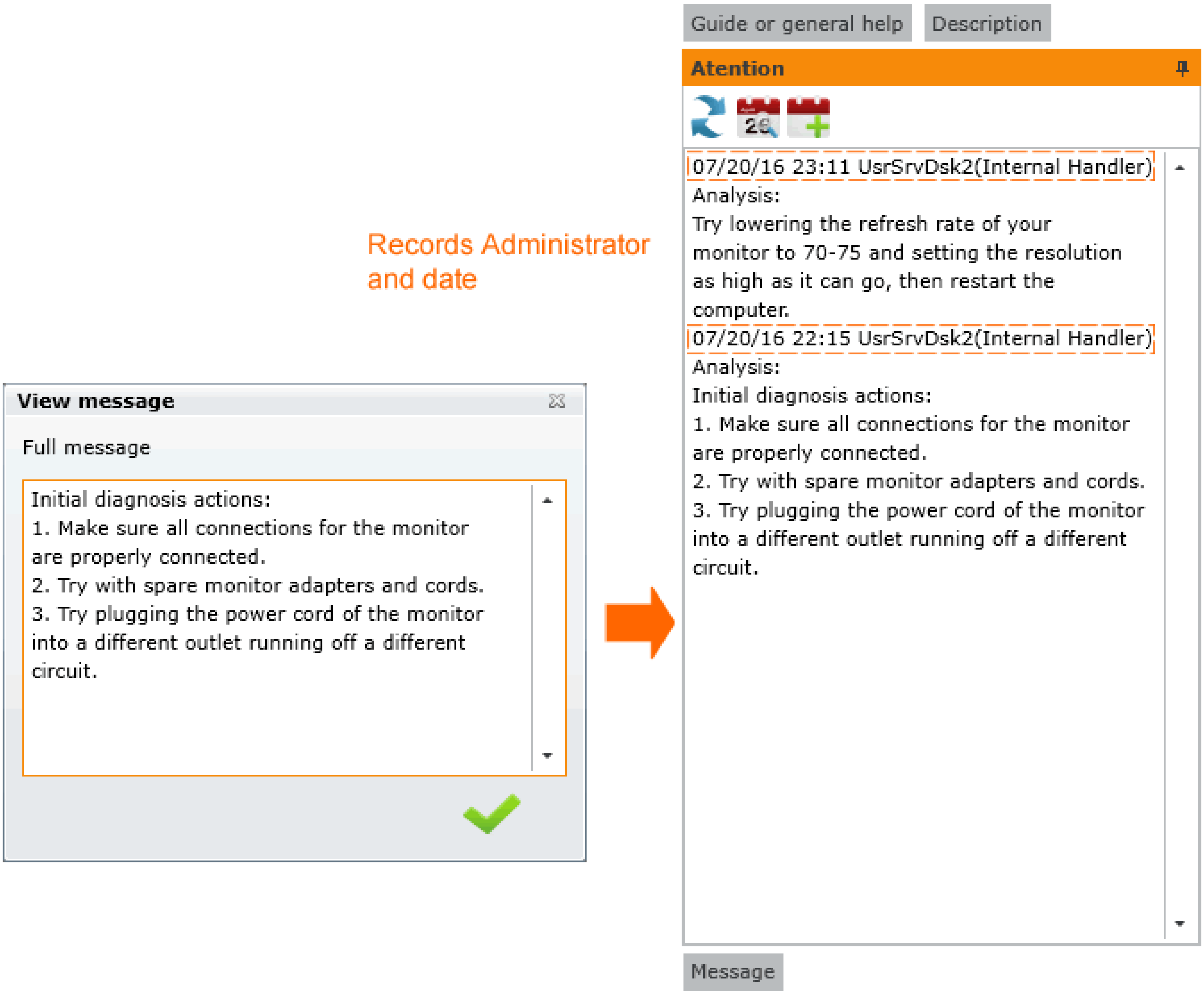
2. To start attention

Click on **Handler** button, the attention window will open, below there's a description of the default fields that appear on the window:

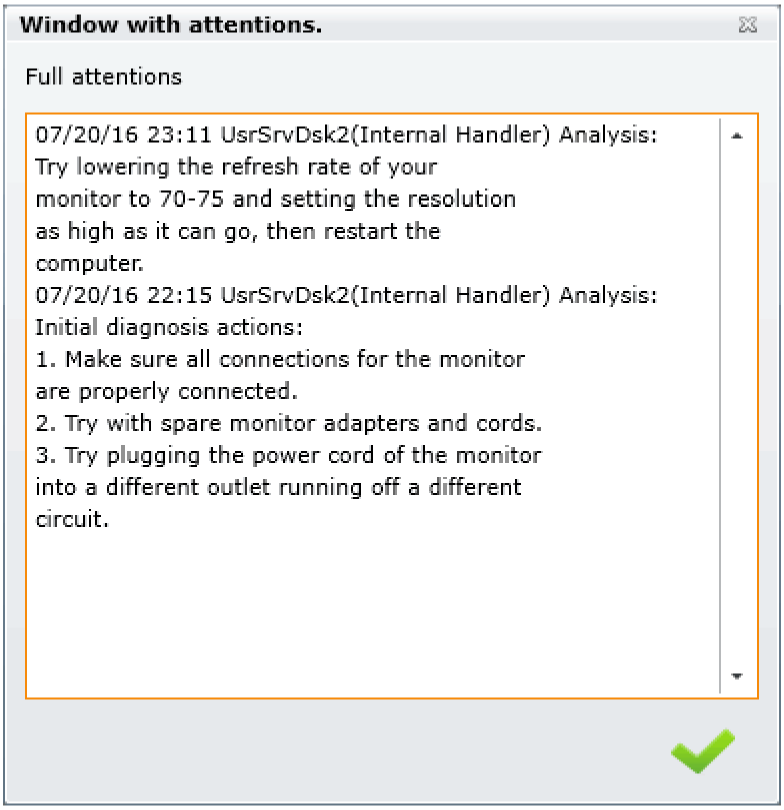


Add attention actions

In the left pane, click on , in the popup screen type the actions and click on  to save.

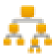


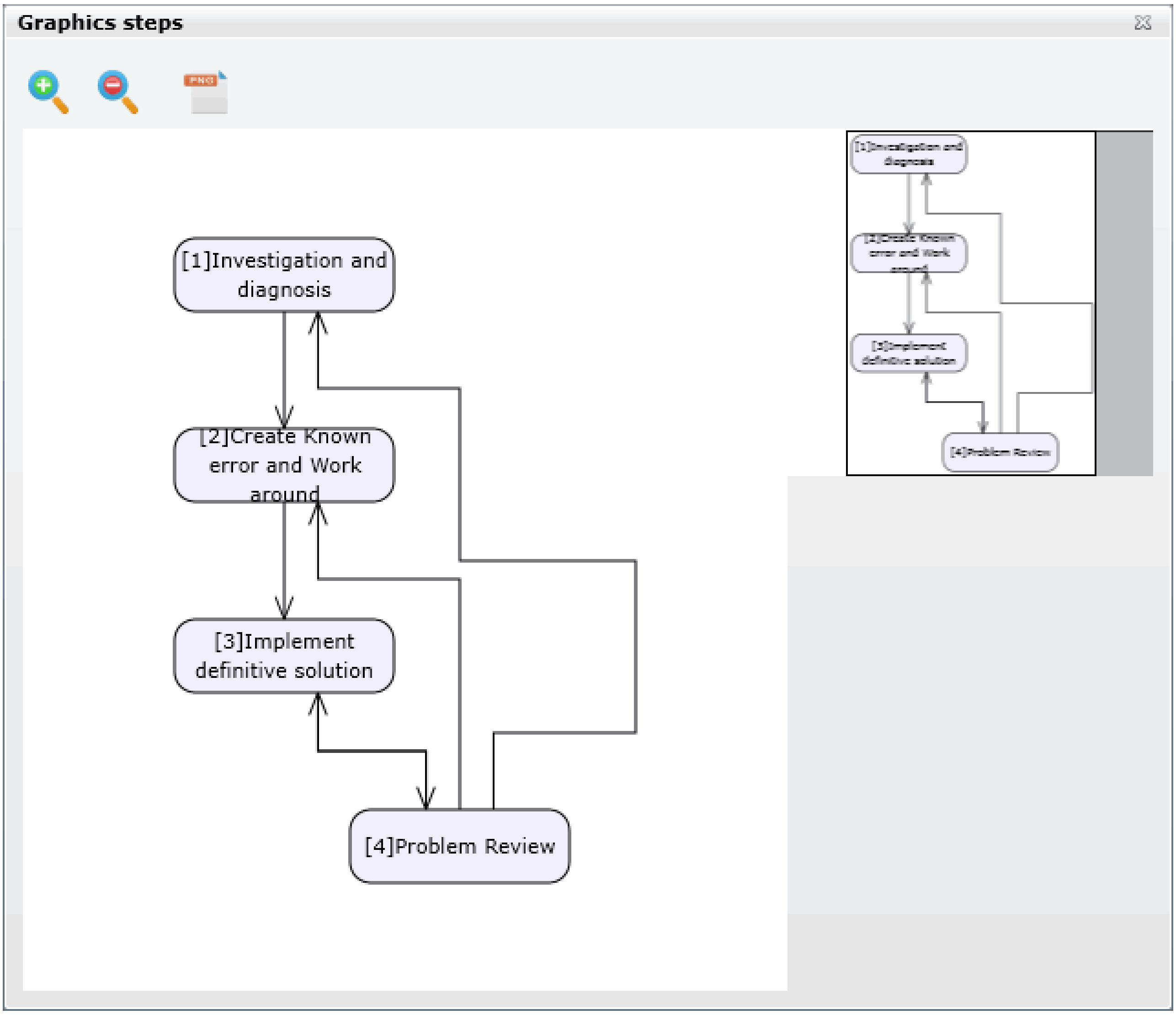
To view the action log, click on 



Guide

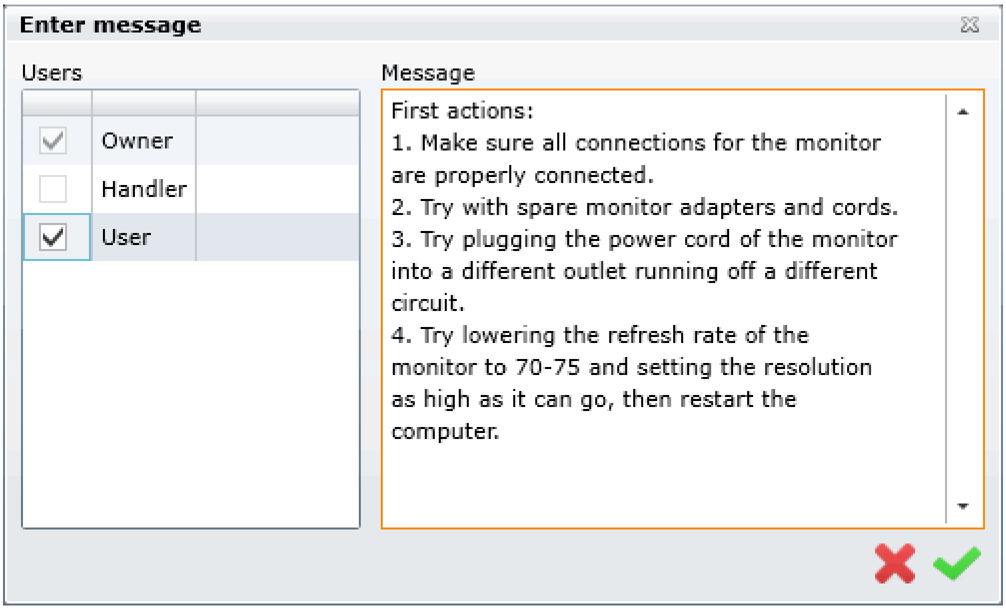
Service support instructions to help solving a case faster, these instructions are defined in the model configuration.
See: How to create a model

Click on  to graph model steps:



Send messages

In the left pane, click on , in the popup screen select the users and type the message to send

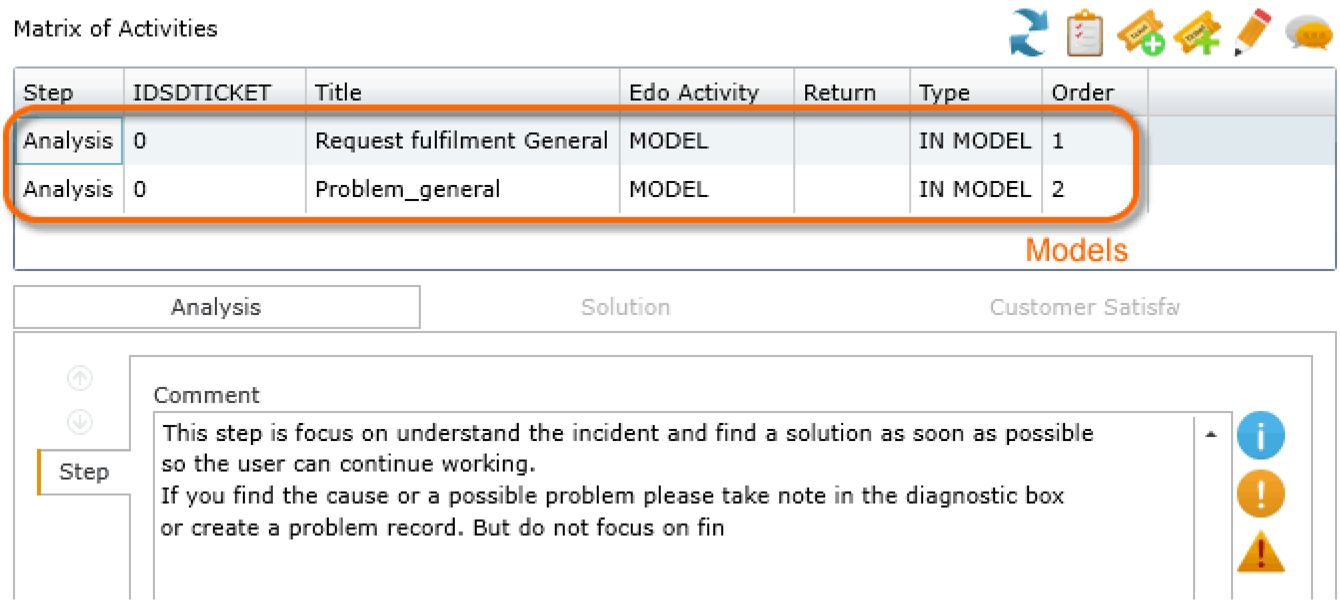


Users and owner can send feedback as well, click on to see if there're new messages.

3. Matrix of Activities

See: How to create a model

IT Help Center is based on activities/attention models. In those, the flow, attention groups, time, escalations, possible returns among others are defined. After a record is created, the tool decides which model will use according to defined rules. Then, the model will rule which group will work in the record. Every while, the tool will check the time that has passed and decide if an escalation is necessary.



Here you can add new related activities/cases:

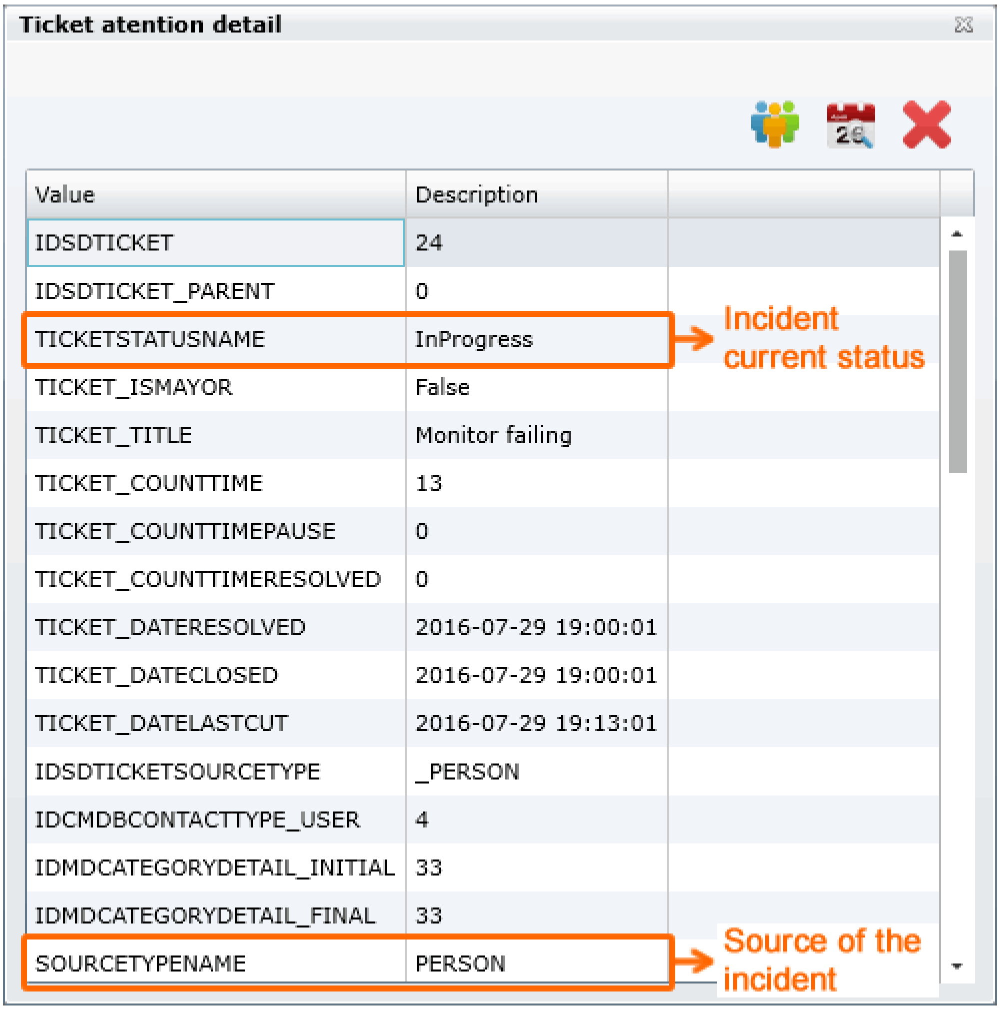
- Requests Create a new request record from an incident
- Problems Create a new problem record from an incident

 See: Create a RFC from a problem record

4. Attention tools

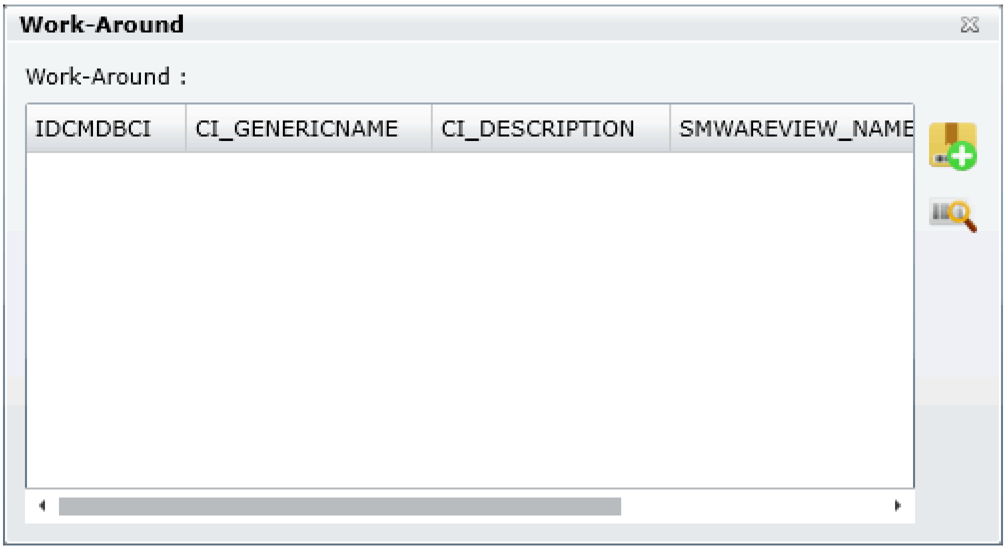
View case details

Click on to see case details



View Workaround

Click on to see related workarounds.



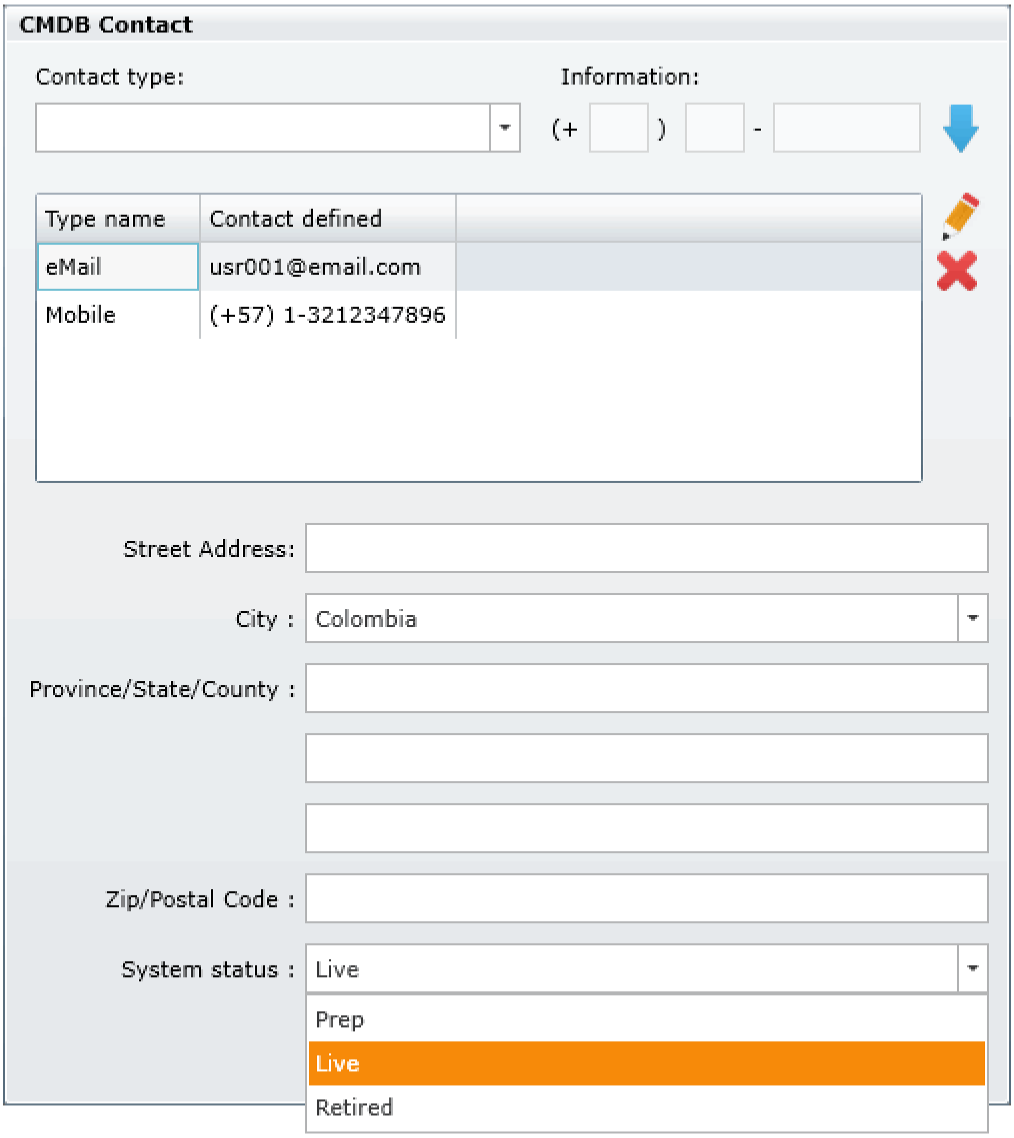
- Click on to search and add workarounds.
- Click on to view selected workarounds.

View user contact info

Click on to see user contact data.

- When you pass the mouse over the icon, you'll be able to see user name and prefered way of contact:

- When you click on icon, a popup screen allows you to add/edit contact details:



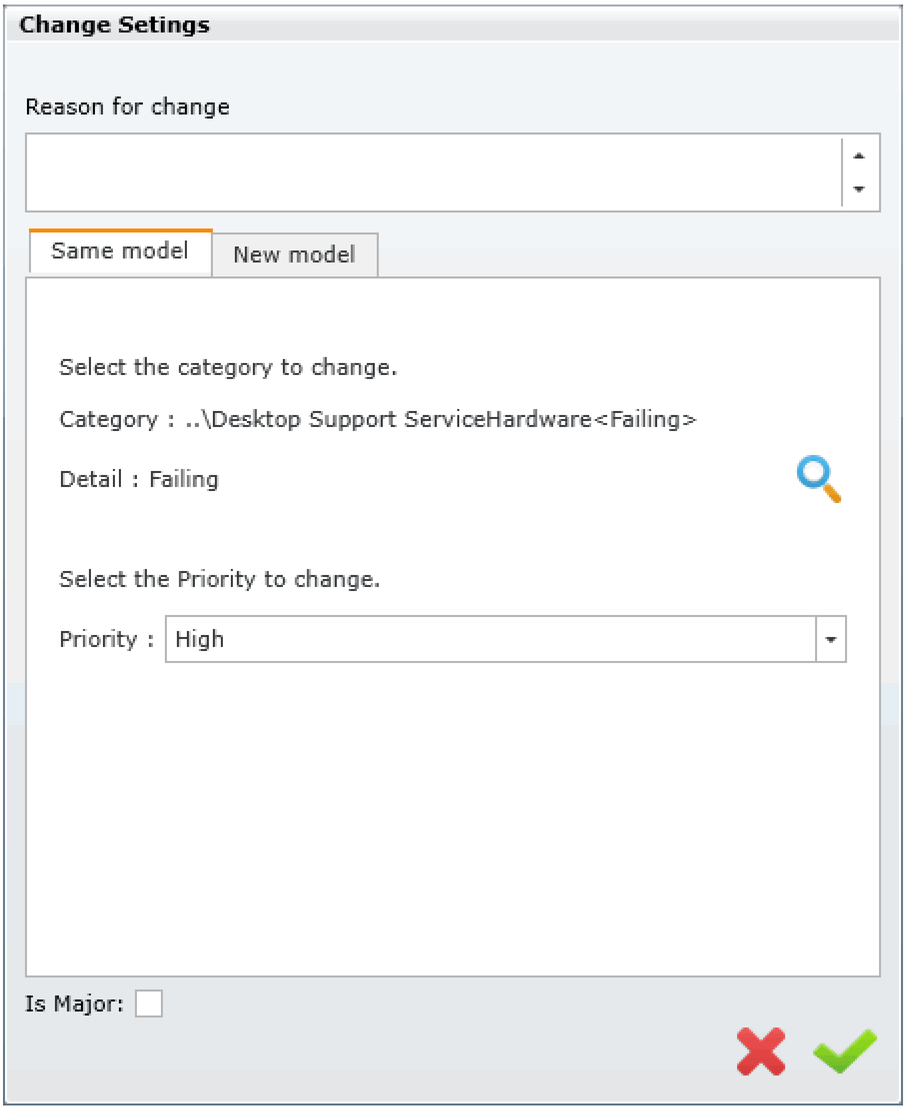
Contact type	Select the notice type (mobile, phone, email)
Information	Type according to notice type: mobile/phone/email and click to add.
Address	Other contact details like Address, country, county/state and zipcode
System status	Select system status: **Prep:** Pending for aprobation **Live: Active**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

Change Category

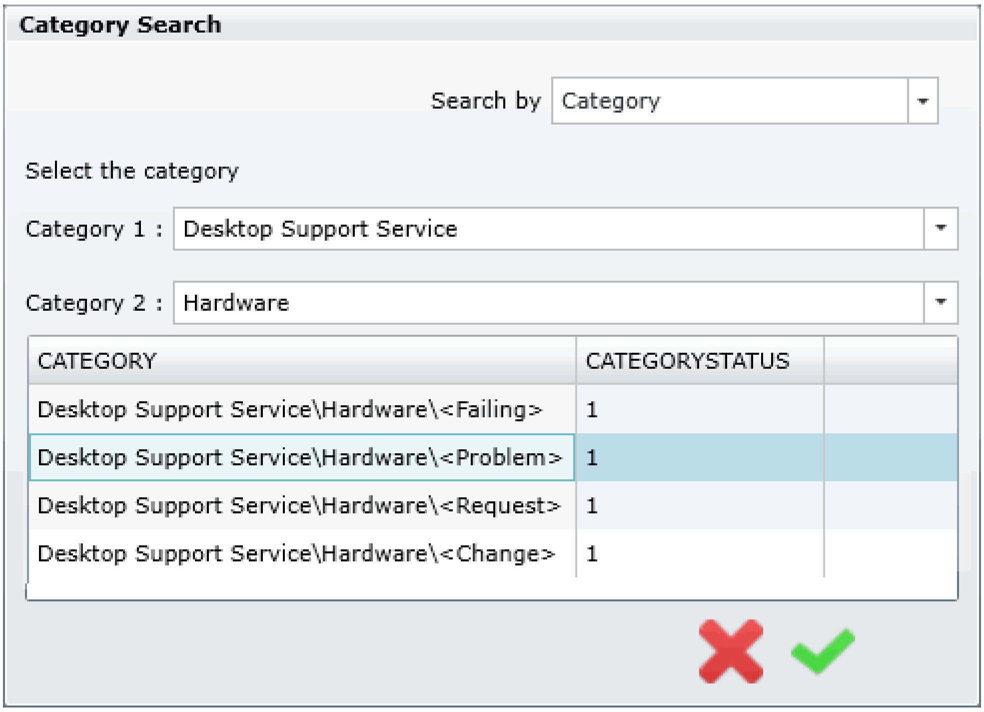
The administrator can change the category before closing the incident.

Click on  to change **Category.**

- Type reason to change category.



- Click on  to categorize the case, search the category that best describes the issue.



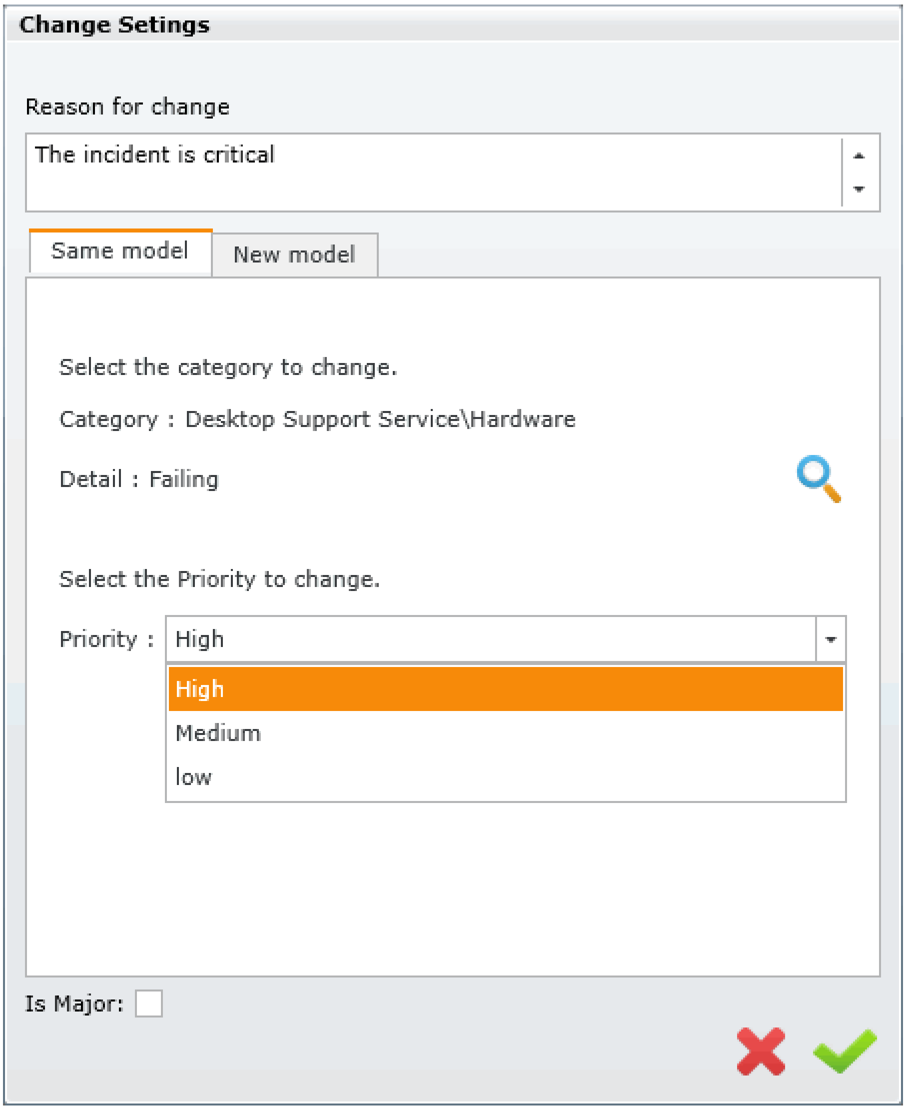
Select a new category and clic on

Change Priority

The administrator can change the priority value before closing the incident.

Click on to change **Priority.**

- Type reason to change priority.
- Select a new **Priority** value from the drop-down list.



You can also click on **Is Major** checkbox

- Click on to save changes.

Functional Escalation

Click on
In the popup screen, you can select escalation type and add a reason to escalate the case:

Go to the next user: The case will be automatically assigned to the next administrator available in the same level.

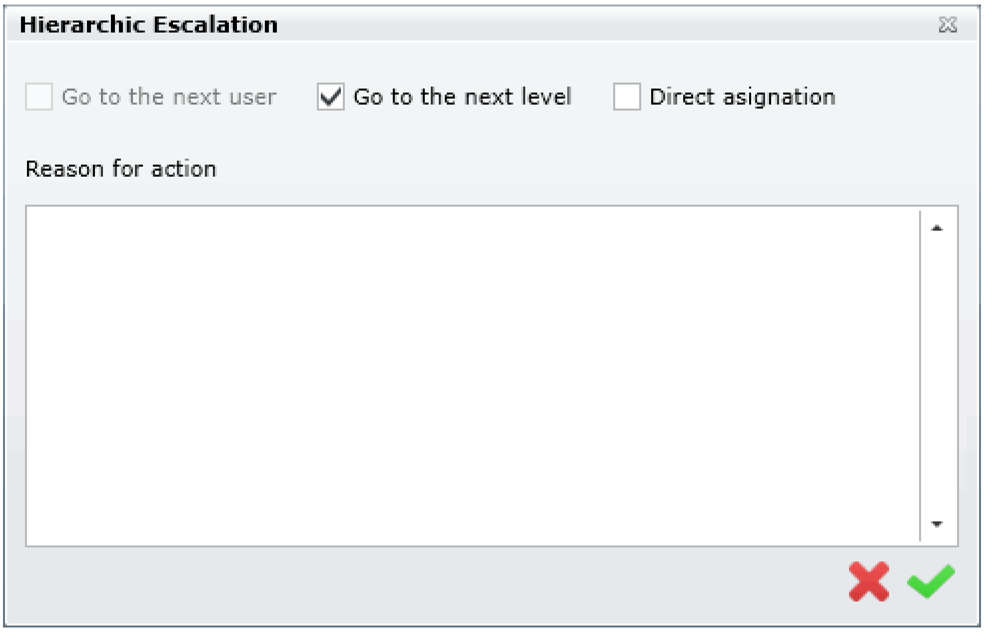
Go to the next level: The case will be automatically assigned to an administrator available in the upper level.
Direct Assignation: Select an administrator from the drop-down list to directly assign the case.

Click on to escalate

Hierarchic Escalation

Click on
In the popup screen, you can select escalation type and add a reason to escalate the case, active options:

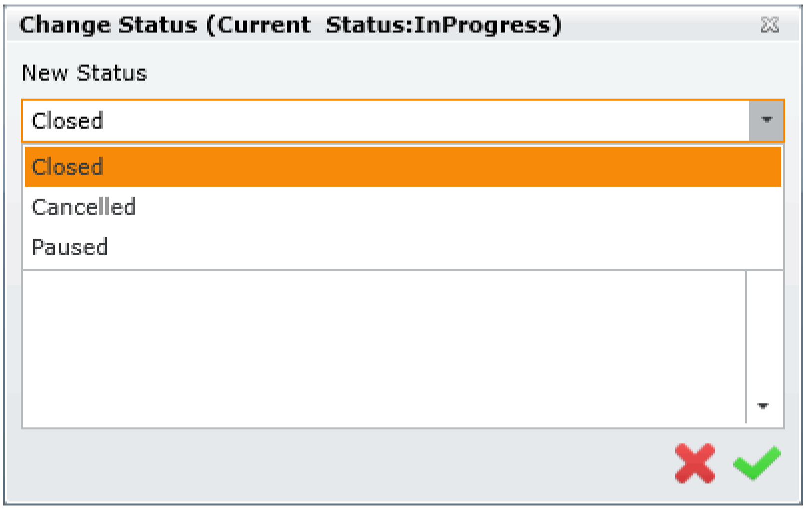
Go to the next level: The case will be automatically assigned to an administrator available in the upper level.
Direct Assignation: Select an administrator from the drop-down list to directly assign the case.



Click on to escalate

Change Status

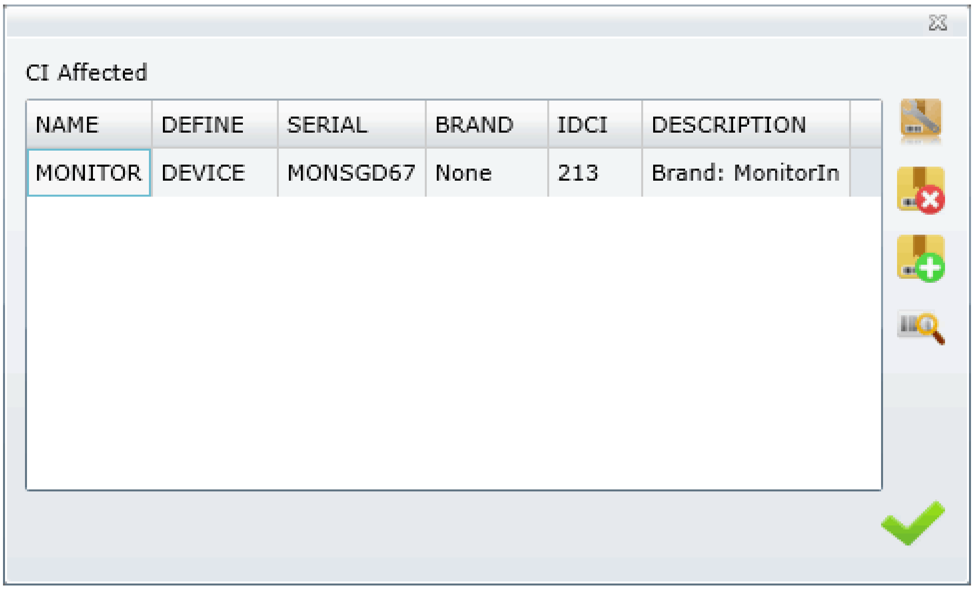
Click on In the popup screen select a new state and add a reason:



When you pass the mouse over the icon, it'll show the current status

CI Editor

Click on In the popup screen you can review or delete CIs already related, or add new CIs



Add CIs: click on a popup screen allows you to browse for CIs.

Edit CI description: Select CI and click on to edit description and click on to save.

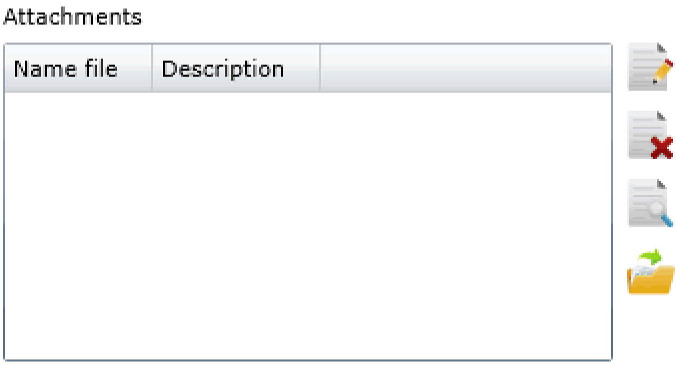
Delete CI: Select CI and click on

View CI: Select CI and click on
A popup screen allows you to view information and relations of the CI

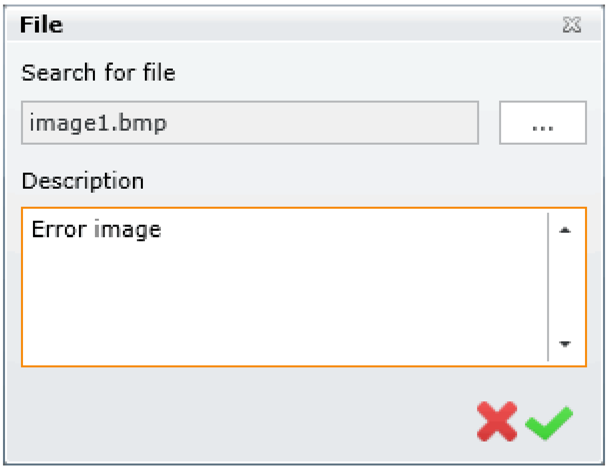
See:
How to view and edit CIs

Attachment Editor

Click on In the popup screen you can review or delete attachments already related, or add new files



Add File: Click 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[1)] 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

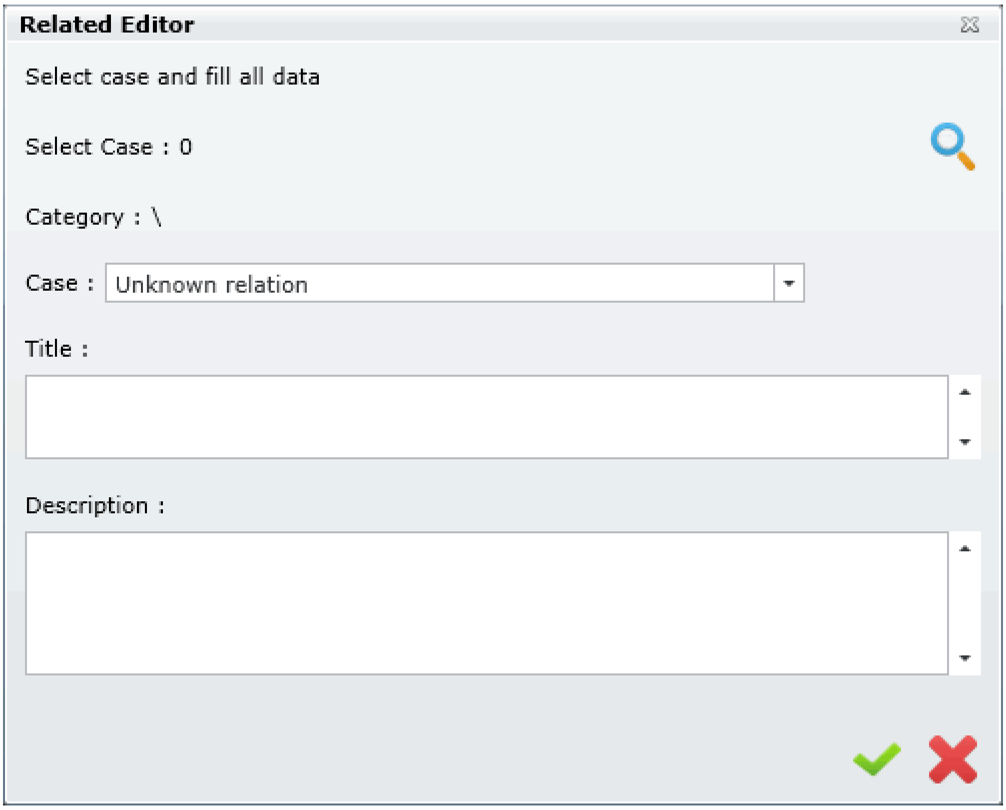
Download File: Select attachment and click on

5. Add/Edit related cases

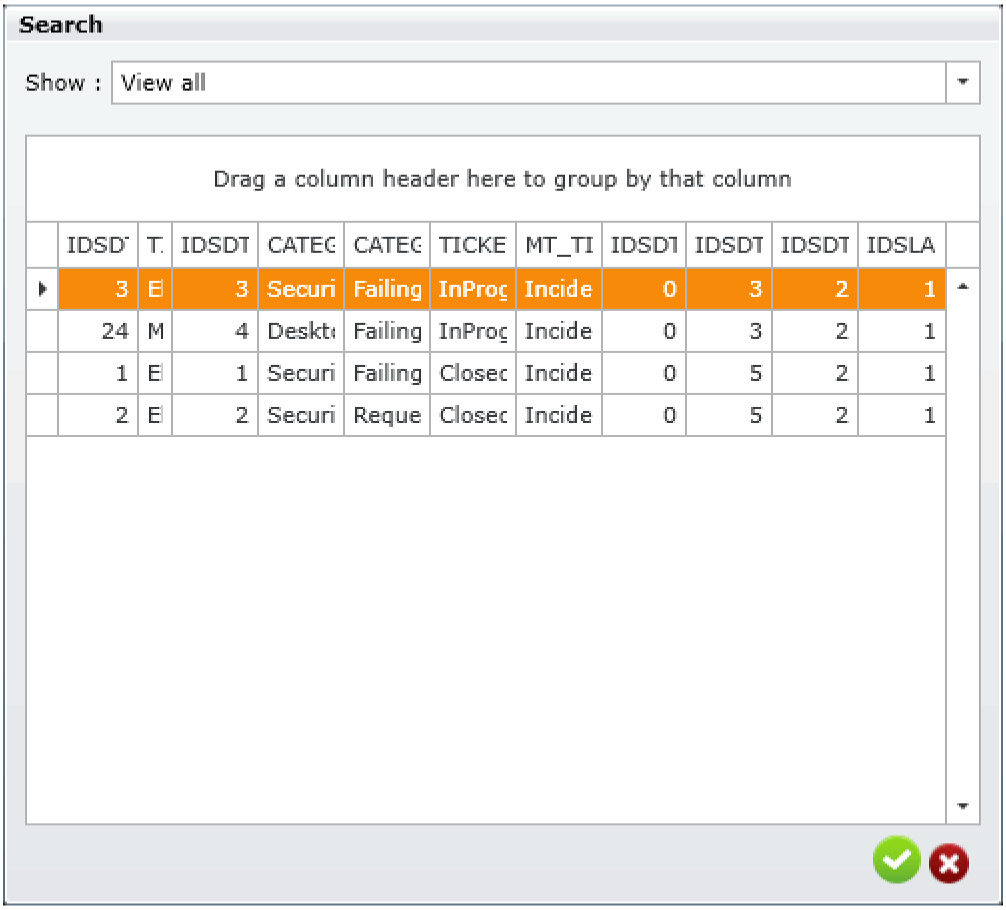
Click on  to add/edit related cases to the incident:

1. When you click on icon, a popup screen allows you to add/edit related cases:

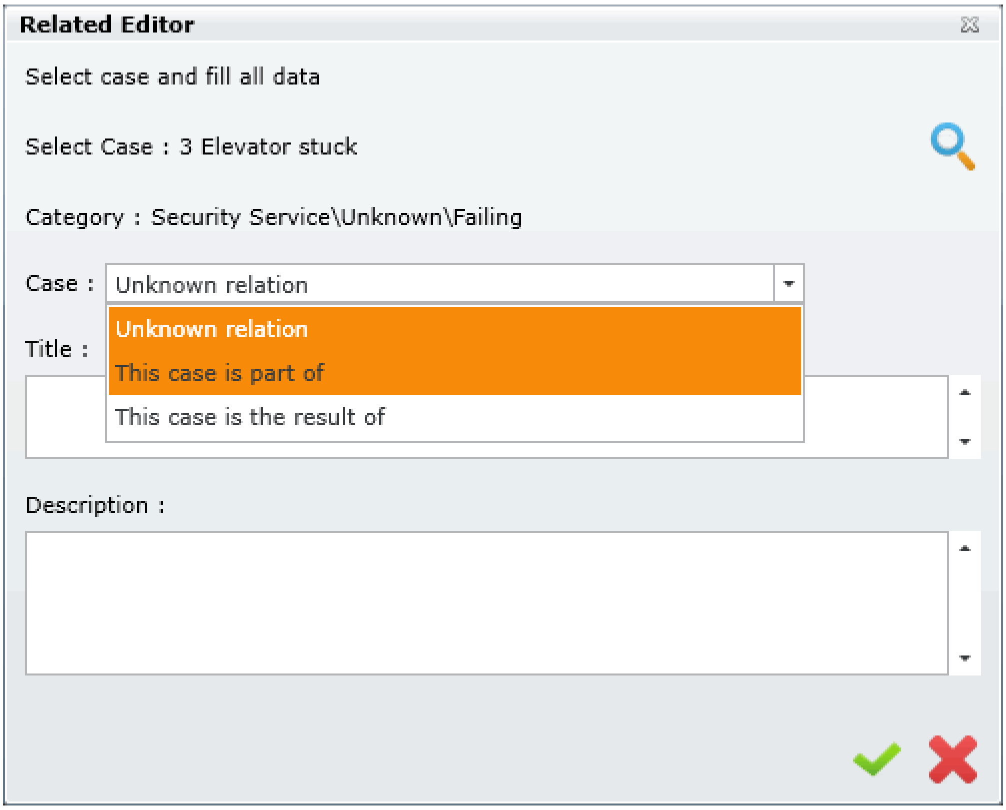
2. Click on  to search and add cases:



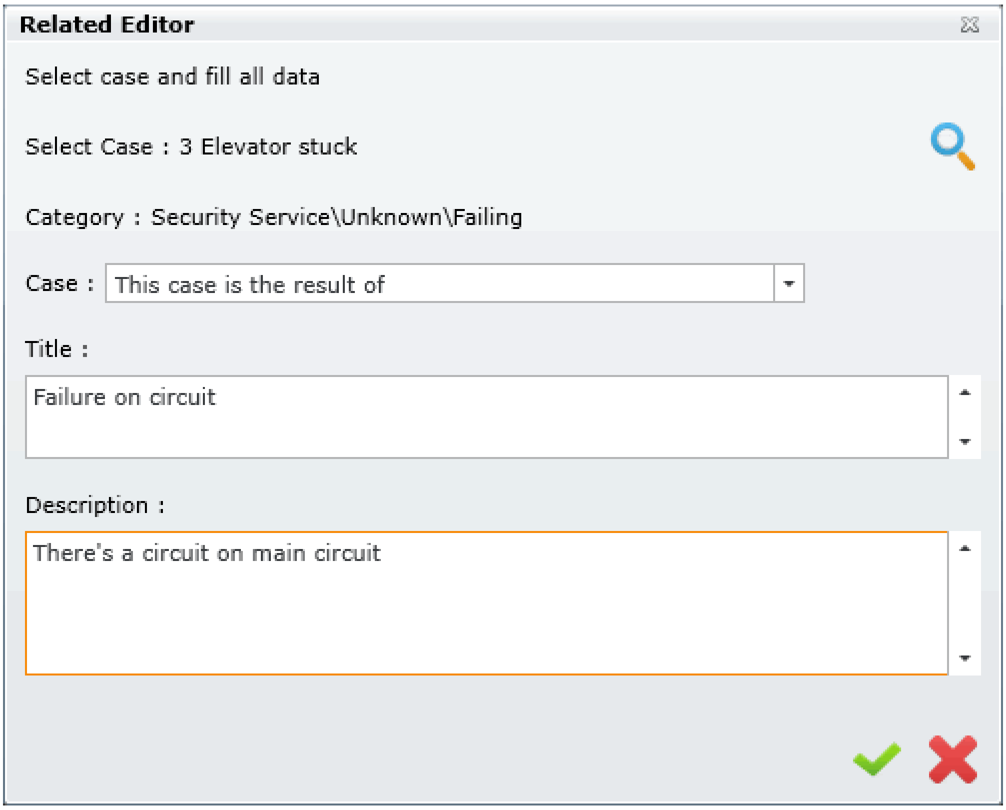
Click on  to search cases:



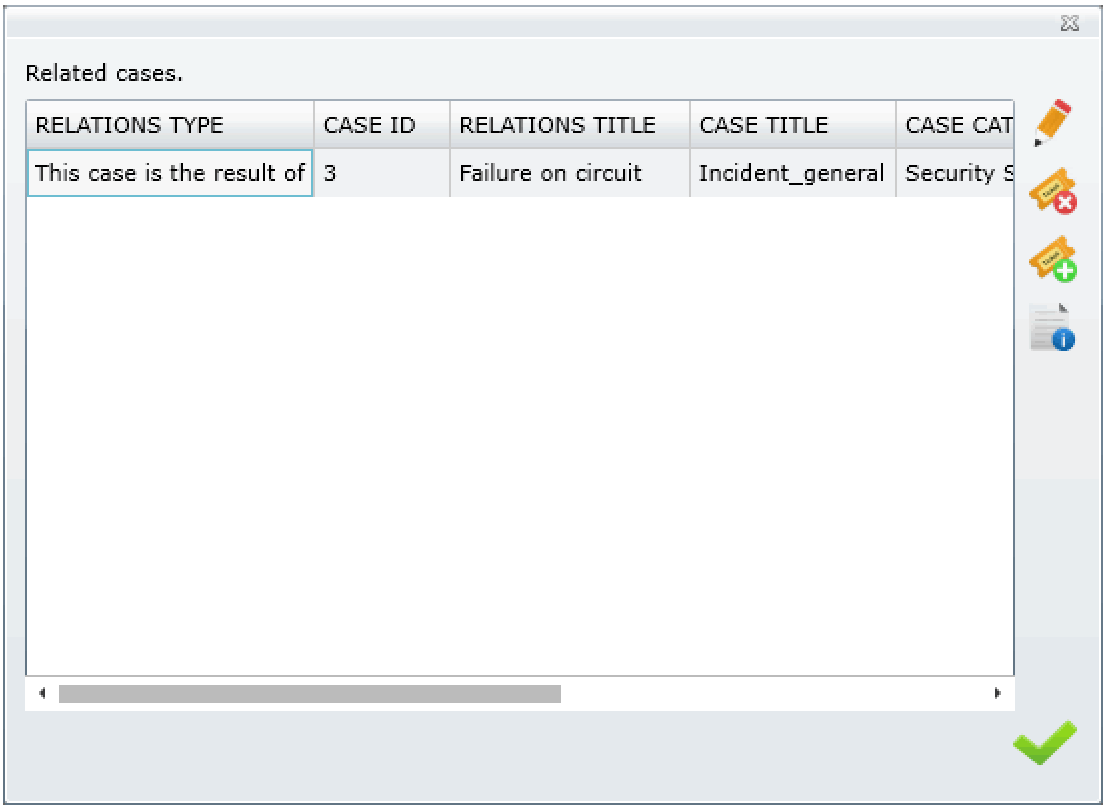
3. Once you've selected a case to relate, select the relation type in the dropdown list: *Unknown relation, This case is part of or This case is the result of*



4. Finally, add title and description:



Click on ✔ to save.



 Click on icon to delete relation

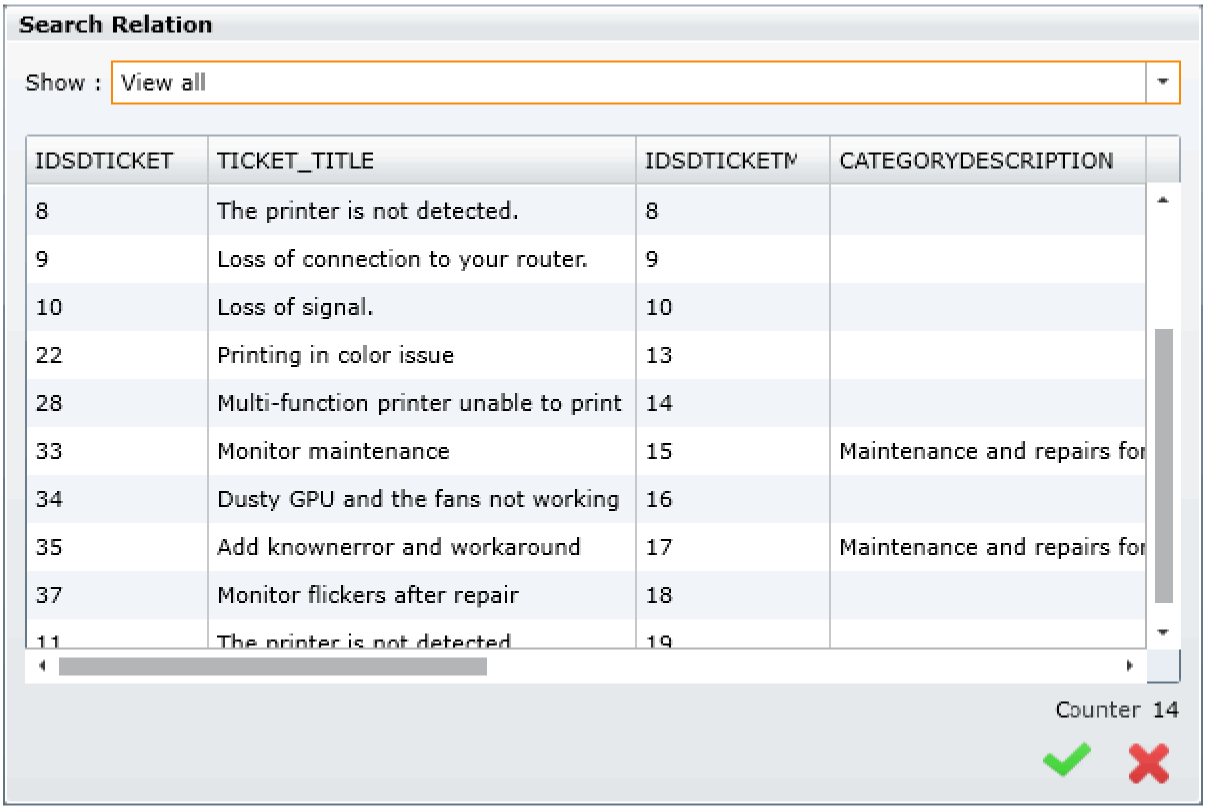
 Click on icon to edit relation

 Click on icon to view the info of the related case

6. Add/Edit parent-child relations

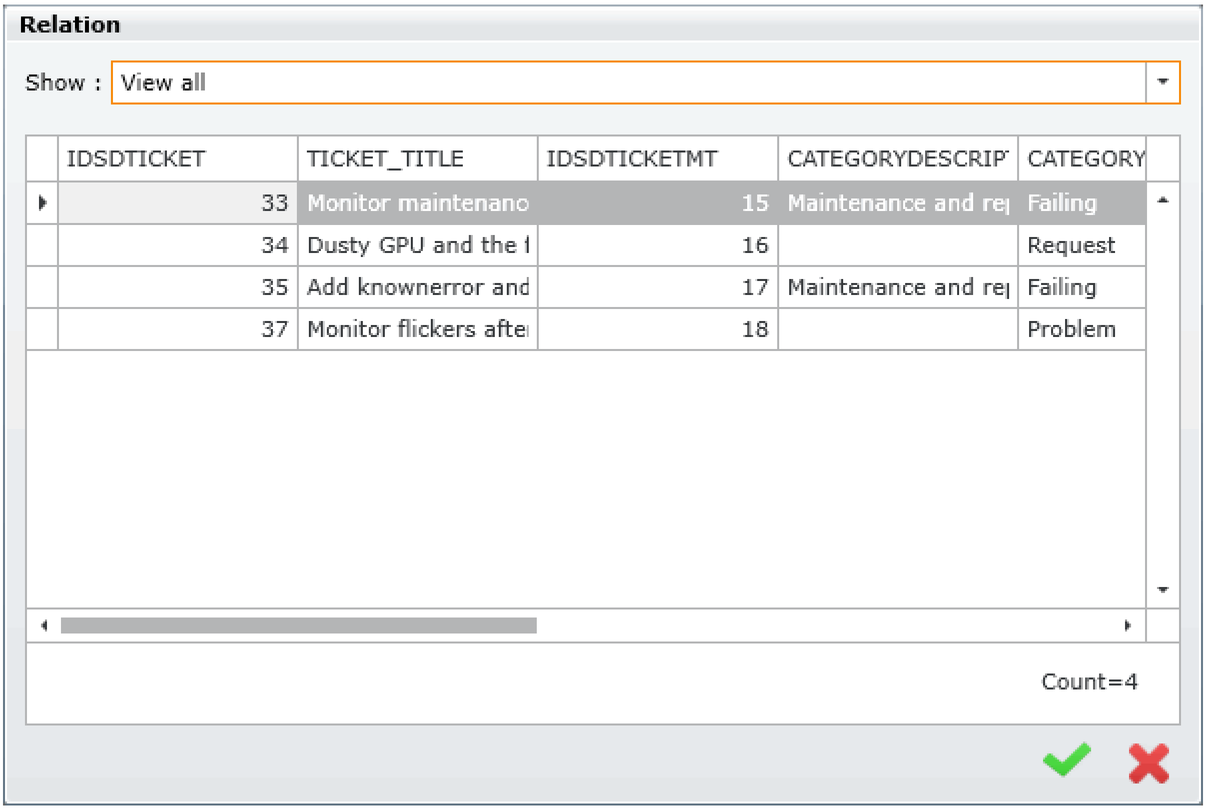
Add Parent Relations

Click on  In the popup screen you can search in a list of existing cases, select the case that will be the **Parent**



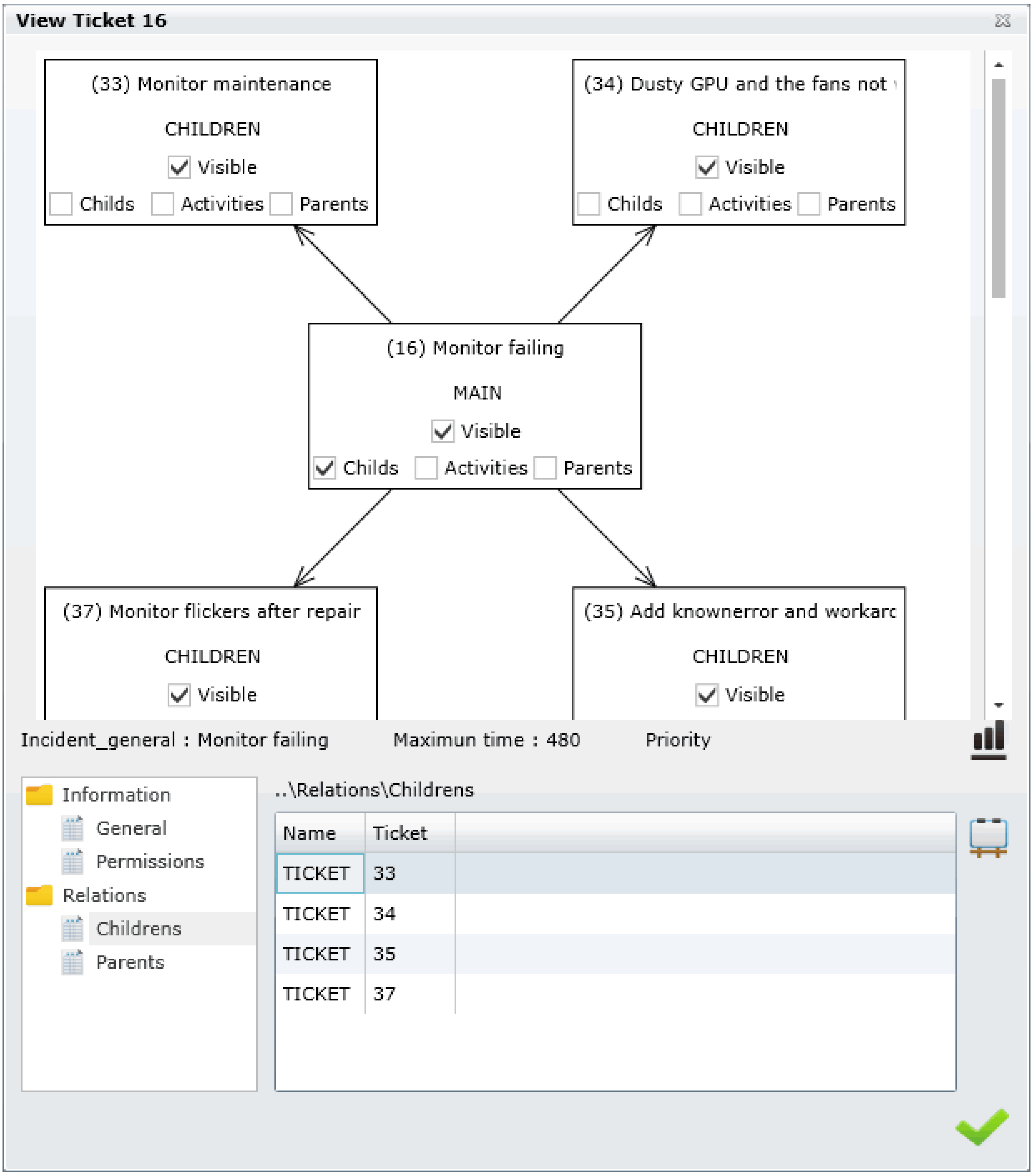
Add Child Relations

Click on  In the popup screen you can search in a list of existing cases, select the case(s) that will be the **Child/Children**



Graph relations

Click on to draw the graphic.



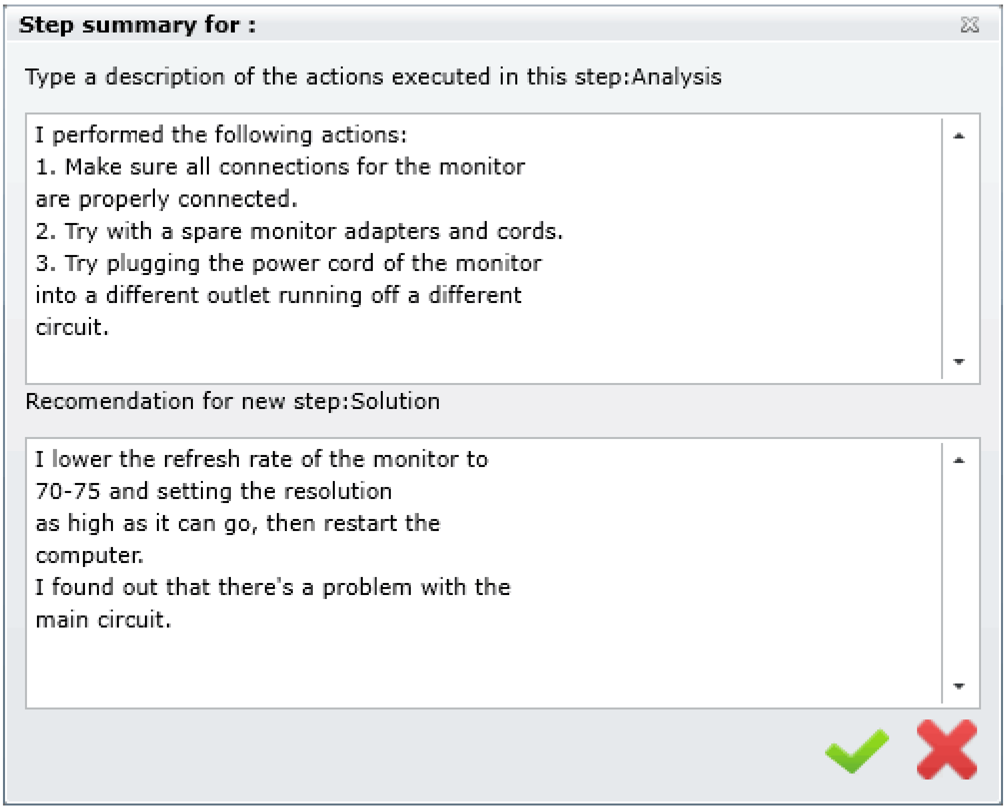
7. Change step

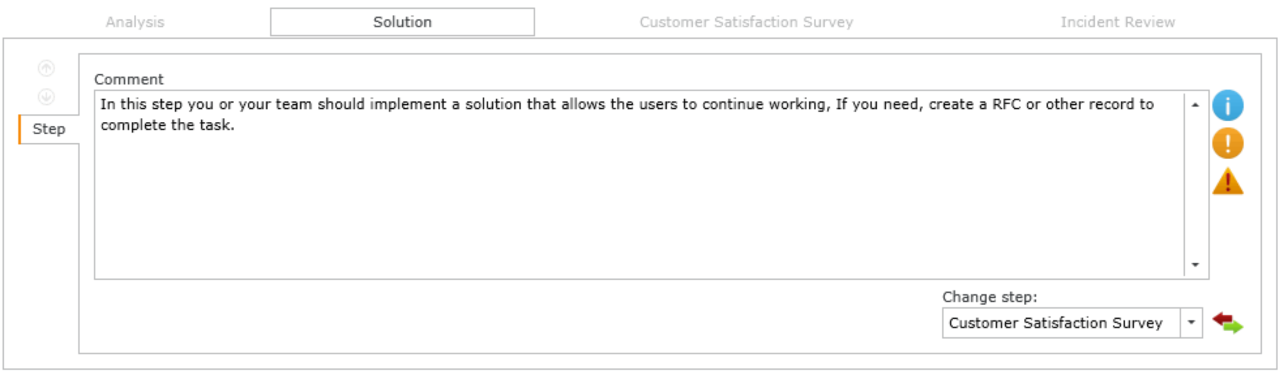
Modifying model configuration and step settings requires access to system configuration,

therefore, you should have administrative privileges.
See: How to create a model

When an administrator has included all activities and actions for the current step, can set the next step. In the right corner bottom, if possible, choose the next step[2] from the drop-down list and click on icon
Each time there's a step change, the admnistrator has to include a reason and optionally a recomendation for the next step.

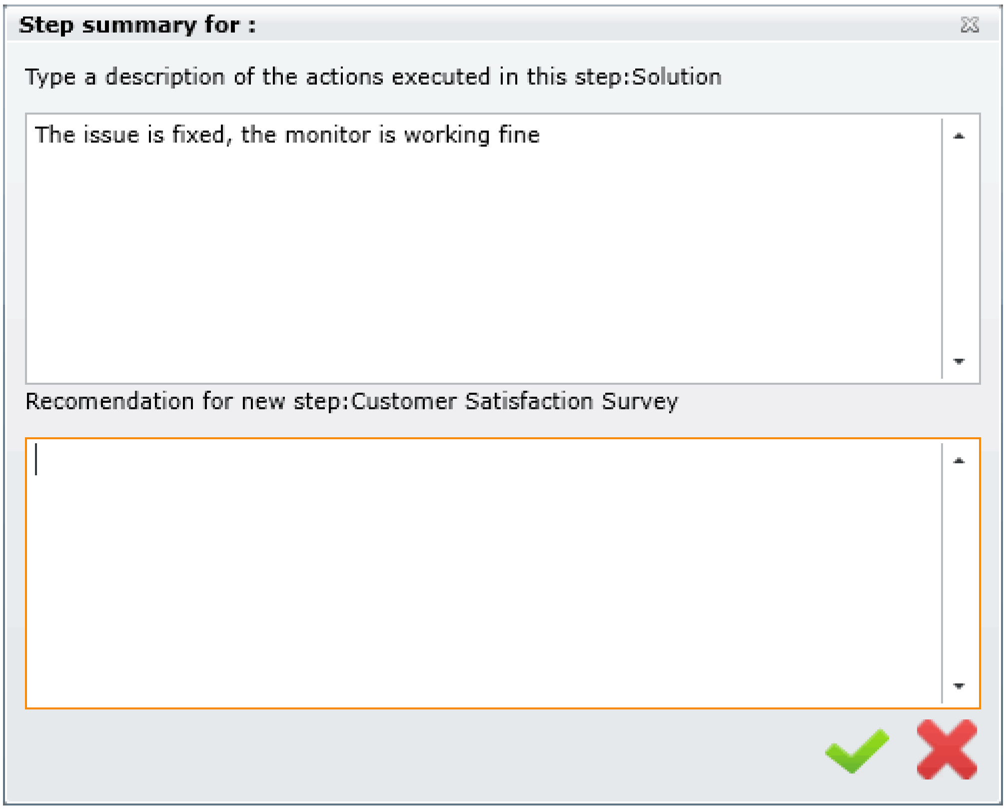
1. To change from **Analysis** to **Solution**

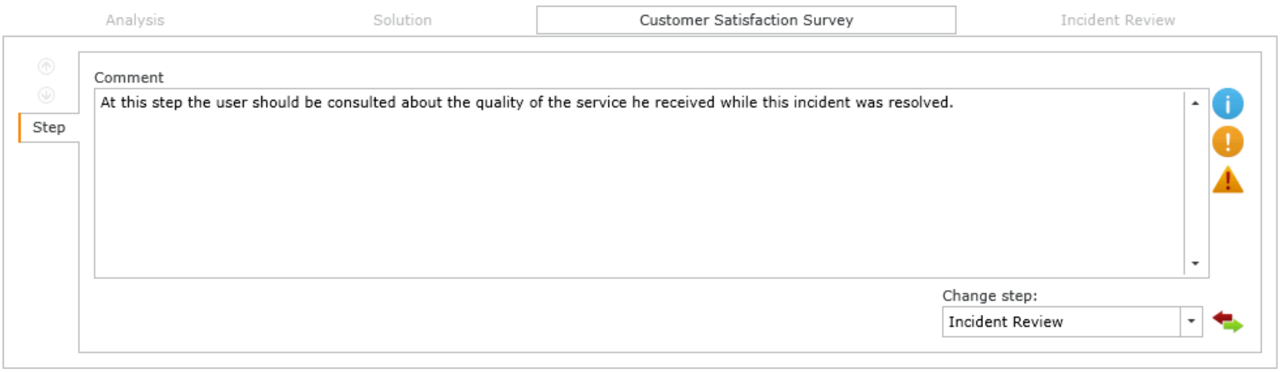




While the incident is in the **Analysis** and **Solution** steps its status is **InProgress**:

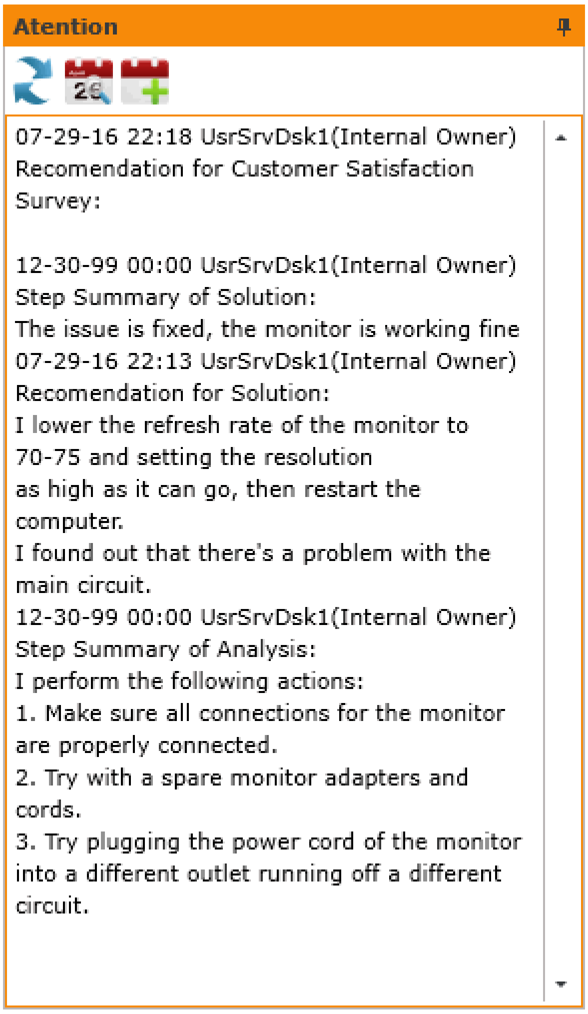
2. To change from **Solution** to **Customer Satisfaction Survey**





When there's a solution and the step is **Customer Satisfaction Survey** the status changes to **Resolved**

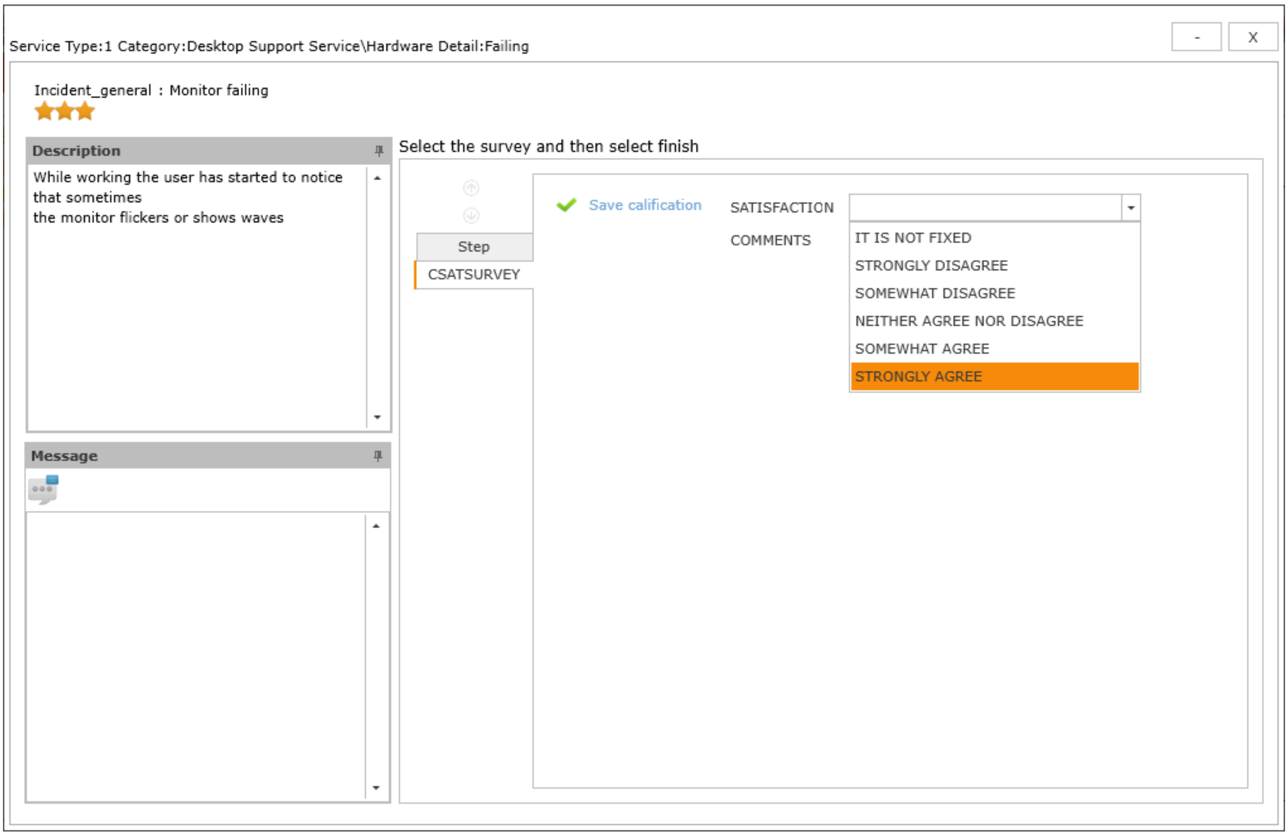
3. Actions and activities are registered in the action log, see Attention pane:



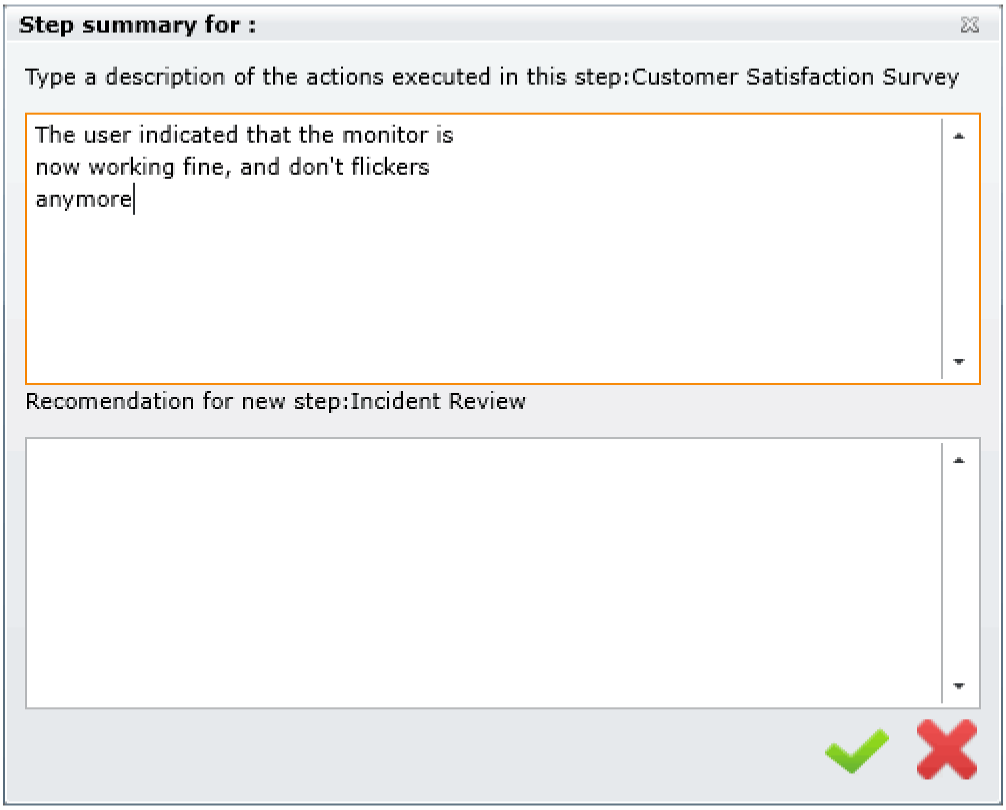
8. Closing case

1. After the **Customer Satisfaction Survey** is sent by the user, the case needs an additional review, if it's approved the case can be closed:

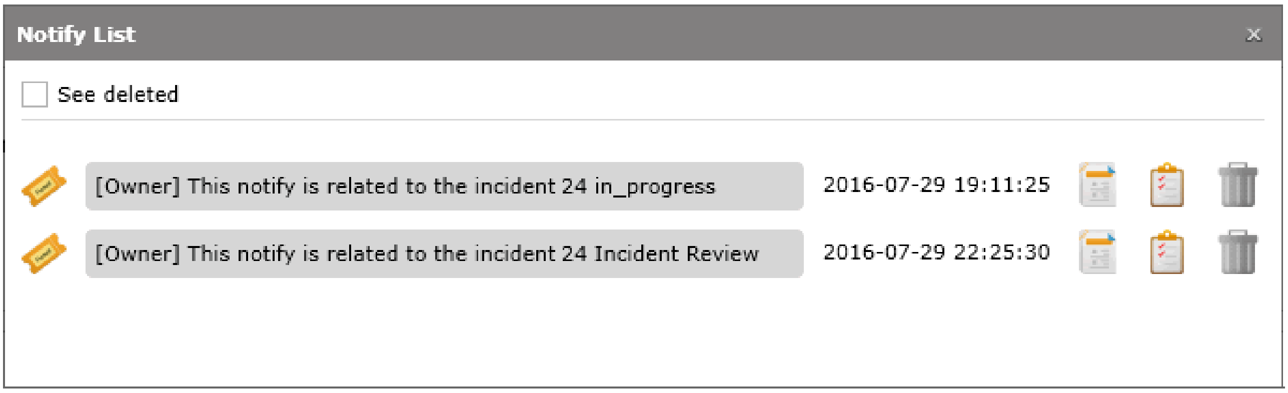
   Customer Satisfaction Survey



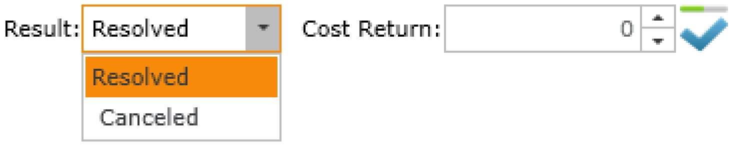
2. To change the step to **Incident Review**, first the handler of the case must type the reason and optionally a recomendation for the next step:



When the step is changed to **Review**, the owner of the case will be notified:

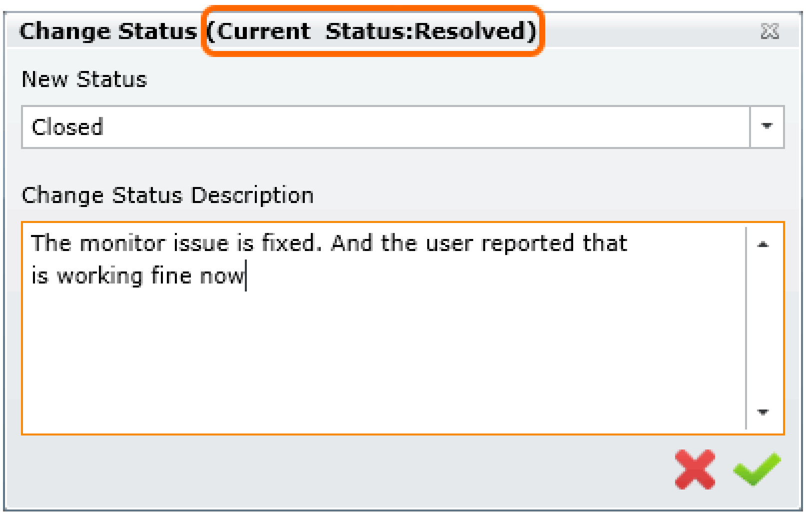


3. According to the review, the case result can be changed to **Resolved** or **Cancelled.** Select a result value from the dropdown list, add a cost return value and click on  to save

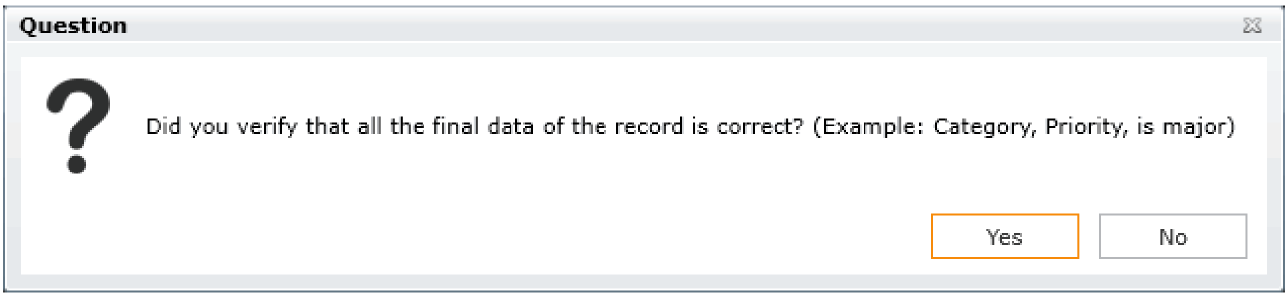


See:
Models:Result values
Models:Set case status

4. Click on  to change status:

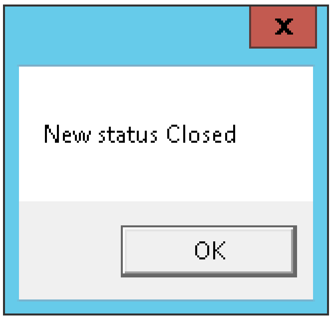


5. When the administrator clicks on  there will be a message asking to verify if the incident data is correct.



If the administrator clicks NO, then can change any detail of the case:
See:
Change Category
Change Priority
Set case as Major

If the administrator clicks yes, the status is changed to **Closed.** :



[1] Optional

[2] According to the service model