

How to solve a Problem

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)
x
- **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
x

User Type

The screenshot shows a dialog box titled 'User types' with a close button (X) in the top right corner. The dialog contains a list of user types with their corresponding descriptions:

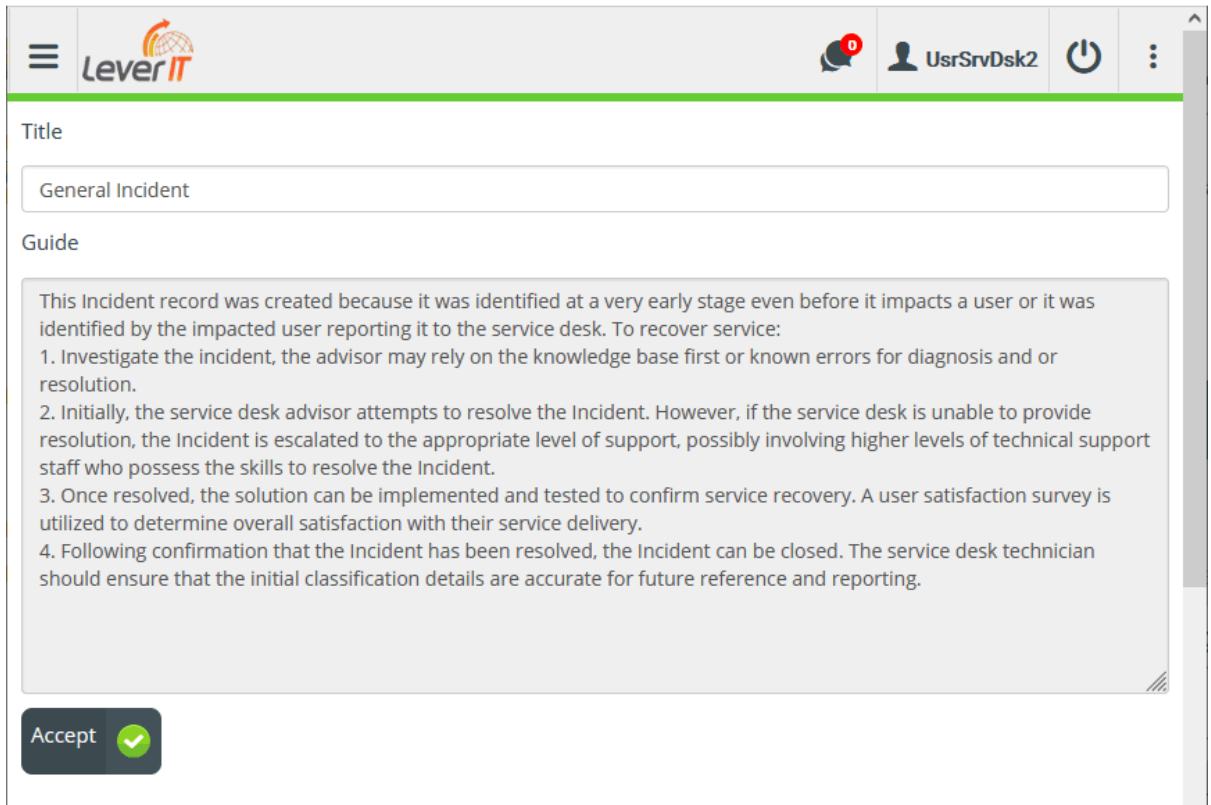
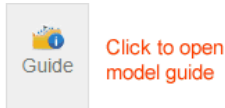
System	System user
Owner	Case manager or case responsible
Handler	Case advisor/technician
Managers Informed	Area managers or managers with greater knowledge
User	End user
OwnerProcess	Other user types according to service type: Incident, Problem, request fulfillment or Request for change
Creator	
Incident Review	
Problem Review	
Request fulfillment approval	
Request for Change Approval	

- **Case type:** Incident, Problem, Request fulfillment, 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

×



- **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 category, 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
- ×
- **Status:** Tool to change the current status of the case. How to change case status
- ×
- **Link:** Tools to link to the current case: [Files](#), [CIs](#), [other cases](#).
See How to use CI tool

×

See How to use Attach file tool

×

See How to use Related cases tool

×

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.

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.

5 Adittional forms

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.

6 Button(s) to change step and current step help.

2. Problem 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

×


Case Information



Information	Permissions	Graphic
Value	Description	
Id SD case	48	
Id SD case parent	0	
Case Status	Problem current status ▶	InProgress
Case is major		
Case title	No mech mode error	
Case count time	0	
Case count time pause	0	
Case count time resolved	0	
Case date resolved	Sun Jul 18 2021 23:58:30 GMT-0500 (Colombia Standard Time)	
Case date closed	Sun Jul 18 2021 23:58:30 GMT-0500 (Colombia Standard Time)	
Case date last cut	Tue Jul 20 2021 20:57:30 GMT-0500 (Colombia Standard Time)	
Id SD case source type		
Id CMDB user contact type	4	
Id MD category detail initial	49	
Id MD category detail final	49	
Source type name	Case source type ▶	PERSON
Case date start	Sun Jul 18 2021 23:58:30 GMT-0500 (Colombia Standard Time))	
Case description	While woking the user has started to notice that sometimes the rho...	

▼ Scroll down to see more case info

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.

Case Category Work-Arounds found 1 Information

Aaliyah Kelley Myers

Click on Add to create a new notification method

Choose on the drop-down list the notification type

Notification method: ✕

Add +

eMail ✓ 📄 📄 ✕

Street Address

Country ▼

Province/State/City

Zip/Postal Code


Save Changes

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.

Attention:

 **Add Messages:**

Advisor who recorded the action	19/07/2021	Action date
 UsrSrvDsk3	Attention for Investigation and Diagnosis There's a problem related with this printer mmodel: I took the front of the printer off and observed that the cut head was not moving far enough to the left to trigger the sensor. I realized that a screw of unkown origin had fallen down behind the cut head and was preventing it from triggering the left sensor	
10:37 AM		



Investigation and Diagnosis

Creation of Known Error and Workaround

Solution Implementation

Review

Current step


3.2 Add Messages

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

Add Messages:

Message:



 **UsrSrvDsk2** Also check the driver date and version 04:22 PM

Message: ✕

Users:


- Owner
- Handler
- Managers Informed
- User

Select the user types the message will be sent to:

Type message




Cancel Send

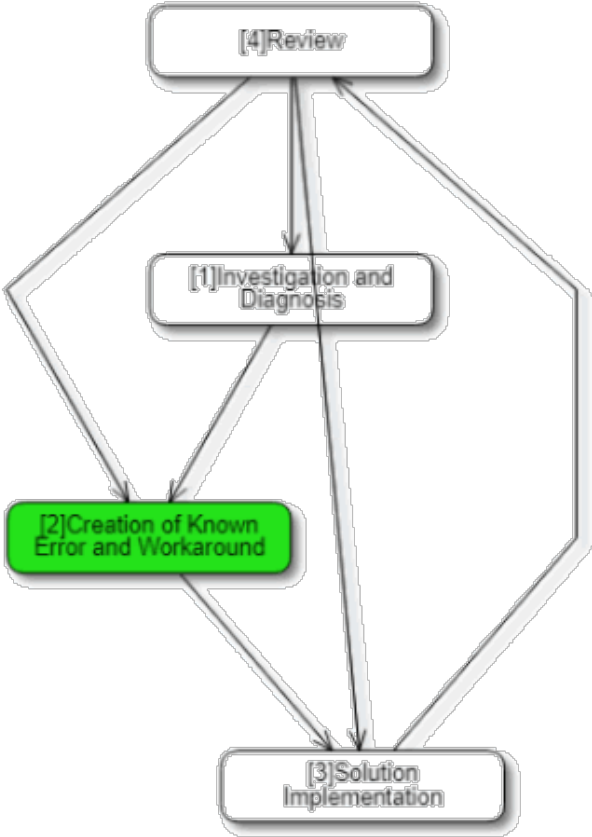
3.3 Attention guide

Click on  to graph the service model steps.

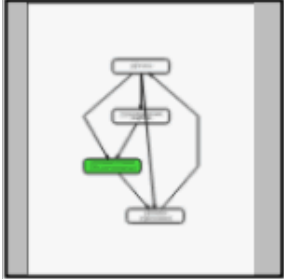
Service model detail ✕

Service model chart



```
graph TD; A["[4]Review"] --> B["[1]Investigation and Diagnosis"]; B --> C["[2]Creation of Known Error and Workaround"]; C --> D["[3]Solution Implementation"]; D --> A;
```




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

Change to the new step:

Current step help

Comment



Once the investigation and diagnosis is complete create a Known Error and Workaround records. If future incidents or problems arise, the investigating service desk technician will identify and provide resolution more quickly using the known error database and associated workaround(s).


Description

OK

Solution Implementation

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
x
- **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)
x
- **User info:** Click on  button to display end user name and double click 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 without 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.

Reason for change

Enter reason for change category before saving

Same model | **New model**

Urgency: High | Is major:

Select Category

Category: IT Service\Printing**<Problem>** Incident> **Add**

Details: Problem

Click on **Add** button to change Category and Details

Select category: Normal search

Select from the drop-down fields by Category

Category 1: IT Service

Category 2: Hardware Support

Category	Category Detail	Path	Knowledge	Action
Incident	Keyboard, mouse or other dev...	IT Service\Hardware Support	0 Self Help:	Select
Incident	Monitor issues	IT Service\Hardware Support	0 Self Help:	Select
Incident	Desktop or laptop issues	IT Service\Hardware Support	0 Self Help:	Select
Problem	Hardware problem	IT Service\Hardware Support	0 Self Help:	Select
Request	Hardware request	IT Service\Hardware Support	0 Self Help:	Select

1 >

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.

Reason for change

Enter reason for change before saving

Same model
New model

Urgency: Is major:

High

▶

Select Category

Category:

IT Service\Printing\<<Problem> Incident>

Add

Details:

Problem

Id MD SLA	SLA name	Model	Calendar	Max time	Normal time	Model Description
3	General Problems	General Pro...	Default	2880	720	The main obj...

Description

Impact: Priority:

Low

▶

low

▶

Title:

No mech mode error

Description:

No mech mode error related to printers model PR890
Please document and create new Known error and Workaround records

Cancel ✖

Add ✔

▶ To change Priority select a new value from the drop-down field

* The model may change as a result of these changes

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)

x

4.4 How to escalatate a case

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

x

- **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.

Attach File
✕

Add +
Update ↻

File	Description				
<input type="text" value="Application.log"/>	<input type="text" value="Application error log"/>		✕	↓	🔑
<input type="text" value="Document.pdf"/>	<input type="text"/>		✕		
<input type="text" value="Image.png"/>	<input type="text"/>		✕		
<input type="text" value="Text.docx"/>	<input type="text"/>		✕		
<input type="text" value="Video.lvd"/>	<input type="text"/>		✕		

- Click to save each file and description (if included)
- To delete file
- To edit permissions of the files
- Enabled after saving file(s). Click this button to save file description
- To download file

4.8 How to link cases

See How to use link cases

- ✕
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. * 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. Example: Due to network problems (main case), a user does not have access to his email (related case).

5. Add/Edit parent-child relationships

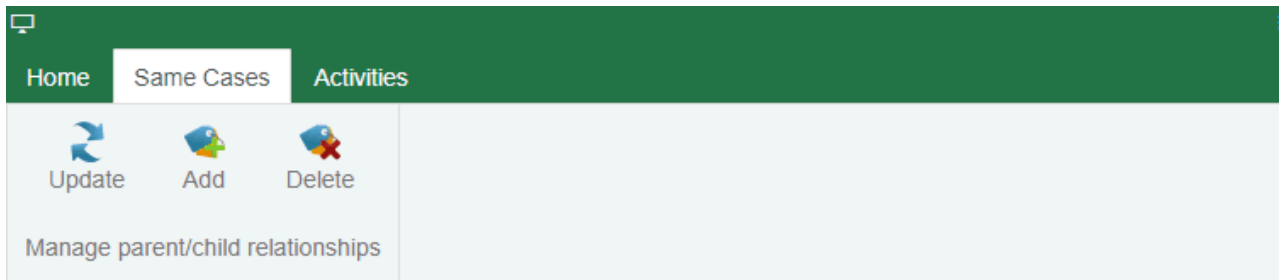
See How add/delete parent-child relationships

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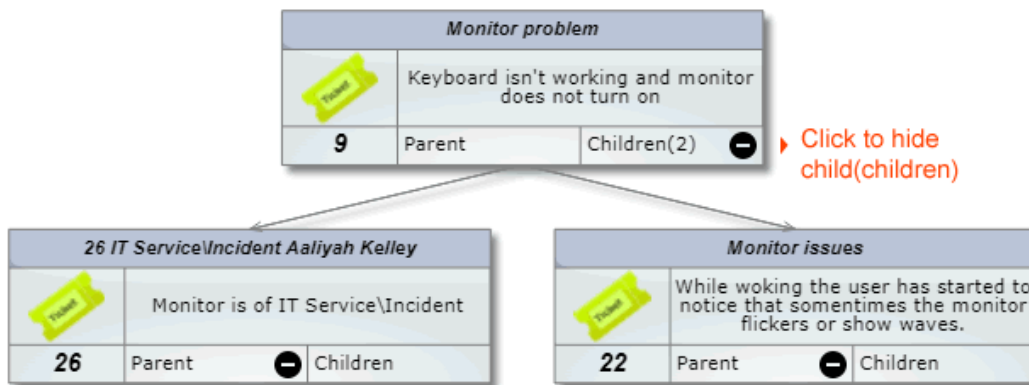
1. In the case attention window go to **Same Cases** tab.
2. Click on the **Add** button, the window to *add parent relationship* will open:

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



Parent case
(2 children related)



* Click on each case to display its basic info below the relationship graph

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:

48

Low
CAT Date: 18/07/2021

No mech mode error

Detail: No mech mode error related to printers model PR890
Please document and create new Known error and Workaround records

Current status: InProg...
Jordan Franklin Ford
Handler Internal

_Problem:IT Service\Printing\Problem

Home
Same Cases
Activities

Activities

Step	Case ID	Model	Activities	Results	Source Model	Position
Actions						
	0	MODEL	IN MODEL			Start

- 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 investigation, diagnosis and other tasks such as creating known error or workaround records for the current step an advisor may change step.

Example

To change from **Creation of Known Error and Workaround** to **Solution Implementation**

20/07/2021

UsrPbm2 10:13...

Attention for Creation of Known Error and Workaround
It were created Known error and workaround records related to printers model PR890

Investigation and Diagnosis
Creation of Known Error and Workaround
Solution Implementation
Review

Known Error Record
▼

Workaround Record
▼

Change to the new step:

Once the Known Error and Workaround records are created, click on the **Solution Implementation** button (Next step)

Solution Implementation

In this step, the solution can be implemented and must be tested to confirm service recovery. However, if a normal change was required, an associated Request For Change (RFC) will be raised and approved before a resolution is applied to the Problem.

[See Create a new RFC record from a problem](#)

Important



- Actions, executed tasks and messages are registered in the action log, see *Actions panel*.
- When the user determines that the case is resolved, the case new status will be **Resolved**.

Case Status and how to change it

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8. Closing case



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](#)

Did you verify that all the final data of the record is correct? (i.e: Category, Priority, is major)

When the OK button is clicked the status will change to **Closed**

New status Closed

To change status to **Closed**:

Change Status (Current:Resolved)

New status

Closed

Change Status Description

Result:

Ok_software

Return cost:

0

1)

Assigned priority is the result of the calculation of urgency and impact

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