



Remedy 7.0 Support Group Lead Role, Responsibilities and Capabilities

Responsibilities of Support Group Lead:

Each Support Group in Remedy must name a Support Group Lead. The Support Group Lead is the primary contact for each support group in Remedy. The Support Group Lead assists with the oversight and management of unresolved case backlogs, as well as acting as an approver for any routing rule changes or other Remedy system configurations affecting their support groups.

To facilitate the management of customer requests to resolution, IT Services will provide the Support Group Lead with a weekly report of unresolved HelpSU Incident Cases older than 5 business days. IT Services will work with the Support Group Lead to make sure such requests are actively worked and ultimately resolved.

Special Capabilities of Support Group Leads

Support Group Lead functions are selected from the **Group Lead Functions** menu in the left sidebar of the Overview Console. The two areas in which they have special capabilities are in creating Templates, and in managing their Group membership and configuration.

The screenshot shows the BMC Remedy IT Service Management interface. The top header is red with the text "BMC REMEDY IT SERVICE MANAGEMENT" and "Welcome, Lundin, Chris". Below the header is a navigation sidebar with a "Company" dropdown set to "Stanford University". The sidebar includes "Console View", "General Functions", "Group Lead Functions" (expanded to show "Templates" and "User/Group Management"), and "Other Applications". The main content area is titled "Overview Console" and displays a table of "Assigned Work".

Request ID	Status	Assignee Login	Request Type	Summary
INC000000000035	In Progress	clundin	Incident	Testing new ticket creation

At the bottom of the table are buttons for "View", "Create", and "Search".

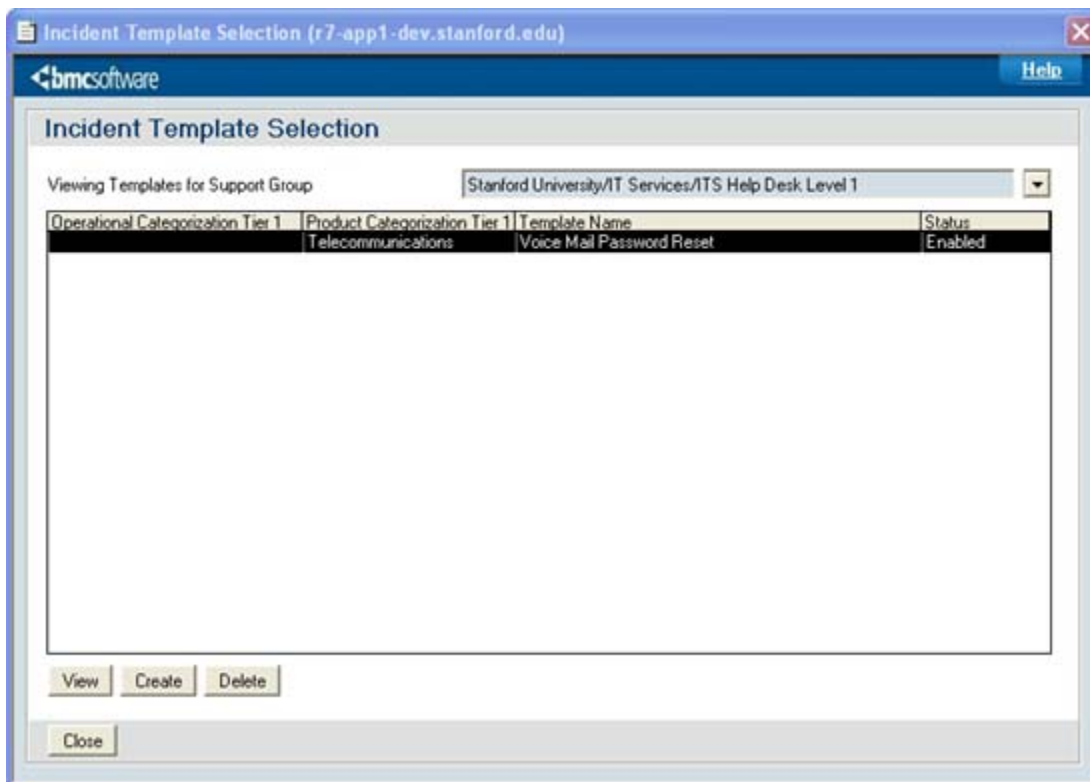
Templates

Templates are an excellent way to populate a New Incident with standard information that is entered on a regular basis by any support group: a kind of “quick ticket”. Support

Group Leads can create templates (as many as they want) for their groups that have prefilled fields (as many as the group feels are appropriate) to speed Incident creation. For example, Summary, and Description, Classification, Resolution etc. can each be pre-defined for certain kind of frequent requests, leaving only the Customer's contact information and specific problem details to be filled in by the support staff. Using templates can allow the support staff create and resolve an Incident in just a few clicks.

Creating Templates:

Click on **Templates** in the Quick Links sidebar under **Group Lead Functions** while on the Overview Console or Incident Form, which opens up the Incident Template Selection:



To create a new template, click 

The Incident Template creation form will open up:

Assign the Template a descriptive name, and set its status to **Enabled**
 Step through each of the Incident form tabs, completing each with whatever fields you would like auto-filled with the use of the template.

It is on the **Authorized For Groups** tab where the Support Group Lead lists which group has authored the template. Note that one must have Support Group Lead permissions in each support group before one can author templates.

Incident Template

Template Name*

Template Status* Sort Order

Classification | Categorization | Assignment | Relationships | Resolution | **Authored For Groups**

Template Authoring Group

Authoring Company* Template Authored Group specifies the group that has the ability to modify this template.

Authoring Organization* It is possible to assign the Template Author to any group(s) where you have the Functional Role of "Support Group Admin". If you have the permission of "Incident Config", then it is possible to assign the Template Author to any group.

Authoring Group*

Groups that use this template

Company	Organization	Support Group Name
<i>Click to Refresh</i>		

It is also on the **Authored For Groups** tab where the Support Group Lead specifies which support group(s) the template is available to.

Incident Template

Template Name*

Template Status* Sort Order

Classification | Categorization | Assignment | Relationships | Resolution | **Authored For Groups**

Template Authoring Group

Authoring Company* Template Authored Group specifies the group that has the ability to modify this template.

Authoring Organization* It is possible to assign the Template Author to any group(s) where you have the Functional Role of "Support Group Admin". If you have the permission of "Incident Config", then it is possible to assign the Template Author to any group.

Authoring Group*

Groups that use this template

Company	Organization	Support Group Name
<i>Click to Refresh</i>		

(See the separate document "Using Templates in Remedy 7" for how support staff take advantage of any templates available to them.)

Screen Shots From A Template for Resetting SUNet ID Passwords

Complete as many fields on the Classification tab as you deem appropriate:

The screenshot shows the 'Classification' tab of an Incident Template. The template name is 'SUNet ID Password Reset' and its status is 'Enabled'. The 'Classification' section includes a 'Summary' field with the same name, a 'Notes' field with the text 'Customer requested that their SUNet ID password be reset', a 'Reported Source' dropdown set to 'Phone', and a 'Service Type' dropdown set to 'User Service Restoration'. The 'Status' dropdown is set to 'Resolved', 'Status Reason' to 'No Further Action Required', 'Impact' to '4-Minor/Localized', 'Urgency' to '4-Low', 'Priority' to 'Low', and 'Weight' to '0'. Navigation tabs at the top include Classification, Categorization, Assignment, Relationships, Resolution, and Authored For Groups. 'Save' and 'Close' buttons are at the bottom.

Complete as many fields on the Categorization tab as you deem appropriate:

The screenshot shows the 'Categorization' tab of the same Incident Template. It features two main sections: 'Product Categorization Selection' and 'Operational Categorization Selection'. The 'Product' section has dropdowns for Tier 1, Tier 2, and Tier 3, and text fields for Product Name, Model/Version, and Manufacturer, with a 'Clear' button. The 'Operational' section has dropdowns for Tier 1 (set to 'Accounts/IDs'), Tier 2 (set to 'SUNet ID'), and Tier 3 (set to 'Password'), with a 'Clear' button. Below these are three dropdowns for 'Automatic Relationship of Customer's CI': 'Automatic CI Relationship', 'CI Relationship Type', and 'Incident Relation Type'. The 'Save' and 'Close' buttons are at the bottom.

Complete as many fields on the Assignment tab as you deem appropriate. (Note that you would not want to complete the “Assignee” field as then the template would be useful to only one member of the Support Group)

The screenshot shows a web application window titled "Incident Template (r7-app1-dev.stanford.edu)". The interface includes a breadcrumb trail with "bmcsoftware" and a "Help" button. The main content area is titled "Incident Template" and features a tabbed interface with the following tabs: Classification, Categorization, Assignment (selected), Relationships, Resolution, and Authored For Groups. At the top, there are fields for "Template Name*" (containing "SUNet ID Password Reset") and "Template Status*" (set to "Enabled"). Below the tabs, the "Assignment" section is divided into two columns: "Assignment" and "Vendor Assignment". The "Assignment" column contains dropdown menus for "Support Company" (Stanford University), "Support Organization" (IT Services), "Assigned Group" (ITS Help Desk Level 1), "Assignee", and "Assign To Current User". The "Vendor Assignment" column contains dropdown menus for "Vendor Company", "Vendor Organization", "Vendor Group", and "Vendor Ticket Number". A "Clear" button is located at the bottom of the "Assign To Current User" field. At the bottom of the window, there are "Save" and "Close" buttons.

Complete as many fields on the Resolution tab as you deem appropriate:

Incident Template (r7-app1-dev.stanford.edu)

bmcsoftware Help

Incident Template

Template Name* SUNet ID Password Reset ...

Template Status* Enabled Sort Order

Classification | Categorization | Assignment | Relationships | Resolution | Authored For Groups

Resolution Details

Resolution: After verifying the individual's identity, the SUNet ID password was reset. ...

Resolution Method: Service Desk assisted

Cause:

Resolution Categorization Selection

Tier 1:

Tier 2:

Tier 3:

Resolution Product Categorization Selection Clear

Tier 1:

Tier 2:

Tier 3:

Product Name (R):

Model/Version (R):

Manufacturer (R):

Clear

Save Close

Incident Template (r7-app1-dev.stanford.edu)

bmcsoftware Help

Incident Template

Template Name* SUNet ID Password Reset ...

Template Status* Enabled Sort Order

Classification | Categorization | Assignment | Relationships | Resolution | Authored For Groups

Template Authoring Group

Authoring Company* Stanford University

Authoring Organization* IT Services

Authoring Group* ITS Help Desk Level 1

Clear

Template Authored Group specifies the group that has the ability to modify this template.

It is possible to assign the Template Author to any group(s) where you have the Functional Role of "Support Group Admin". If you have the permission of "Incident Config", then it is possible to assign the Template Author to any group.

Groups that use this template

Company	Organization	Support Group Name
Stanford University	IT Services	ITS Help Desk Level 1

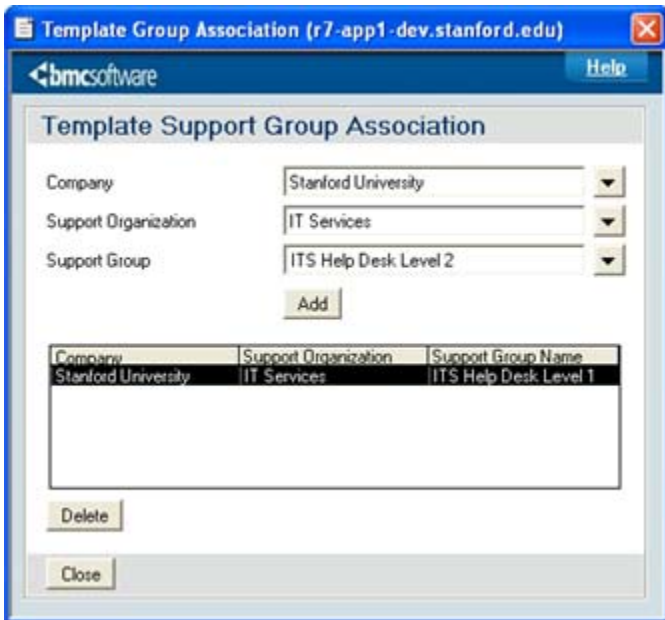
Update

Save Close

Templates when they are created are automatically associated with the Authoring Group. Other groups can be given access to use templates by clicking on the **Update** button. Select the appropriate support group from the available menus (remember you must be a

support group lead for those groups to be able to assign a template to them) and click

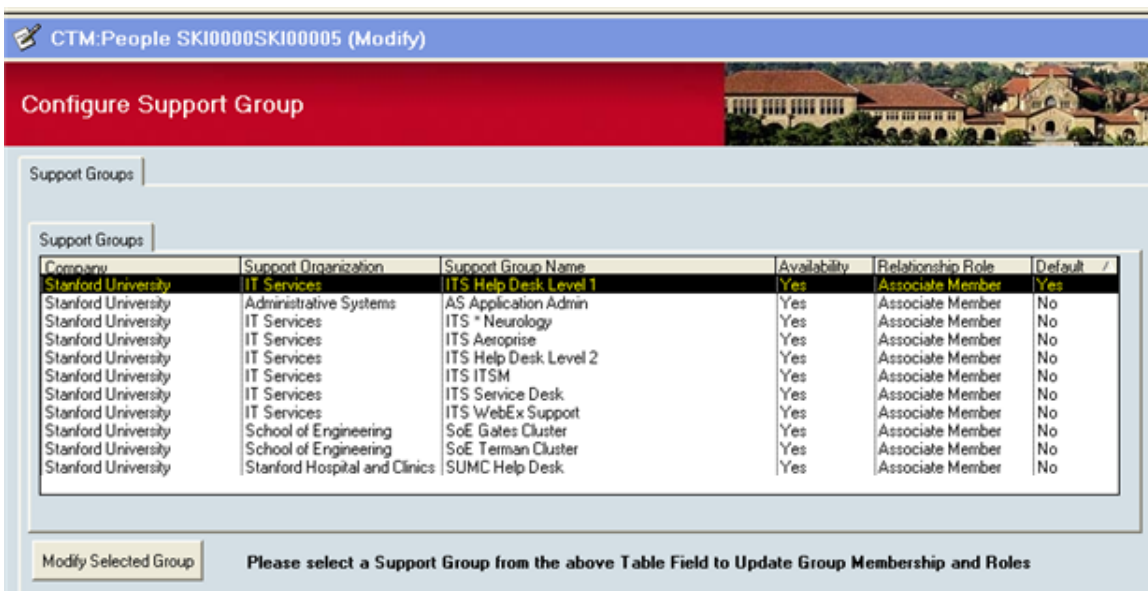
Add



User/Group Management

The Support Group Lead has the capability to configure users in their support groups, as well as some aspects of the group's support profile.

Clicking on User/Group Management in the Group Lead Function in the left sidebar will open the **Configure Support Group** form:



All of the groups for which the Support Group Lead has that role are displayed.

Select the group you want to work with, and click

Modify Selected Group

The screenshot shows the 'Support Group' configuration page in BMC Remedy IT Service Management. The page title is 'Support Group SGP00000000147 (Modify)'. The breadcrumb navigation includes 'Support Group', 'People Display', 'Roles Display', and 'Business Hours and Holidays'. The main content area is divided into two sections: 'Support Group' and 'Group Aliases'. The 'Support Group' section contains fields for 'Support Group ID' (SGP00000000147), 'Support Company*' (Stanford University), 'Support Organization*' (IT Services), 'Support Group Name*' (ITS Help Desk Level 1), 'Visibility Group Name*' (HelpSU General), 'Description', 'Vendor Group*' (Yes/No), and 'On-Call Group*' (Yes/No). The 'Group Aliases' section has tabs for 'Group Aliases', 'Favorite Groups', and 'On-Call', with a list area currently empty and a 'Click to Refresh' prompt. An 'Update' button is located below the list. At the bottom, there is a 'Quick Actions' menu with options: Proposed, Enabled, Offline, Obsolete, Archive, and Delete. The 'Submitter*' and 'Last Modified By' fields are both 'lneil', and the 'Submit Date' and 'Last Modified Date' are both '11/29/2007 9:08:30 PM'. 'Save' and 'Close' buttons are at the bottom left.

On the People Display tab, the Support Group lead can manage the membership of the support group, adding and deleting users as appropriate.

NOTE: The Support Group Leads cannot assign Remedy licenses to brand-new users, that must be done by IT Services staff via a HelpSU request

<http://helpsu.stanford.edu?pcat=HelpSU>

Using the **Quick Actions** menu in the lower right, you can make members of the group Available or Unavailable, if they are on vacation or leave, or just returned from same.

Support Group SGP00000000147 (Modify)

BMC REMEDY IT SERVICE MANAGEMENT

Support Group

Support Group | People Display | Roles Display | Business Hours and Holidays

People Display

Full Name	Login ID	Relationship Role	Assignment Availability
Clark, Jamal	jamacl	Associate Member	Yes
De Martini, Frank	fwd	Associate Member	Yes
Dimaano, Michael	mdimaano	Associate Member	Yes
Diaz, Fernando	fdiaz	Associate Member	Yes
Duong, Lien Tu	lduong	Associate Member	Yes
Fidel, Rahel	workksha	Associate Member	Yes
Lundin, Chris	clundin	Associate Member	Yes
McLennan, Stephen C	stevemcl	Associate Member	Yes
Miclat, Fred F	fmiclat	Associate Member	Yes

View Add Delete Quick Actions [Dropdown] Execute

Submitter* [tnel] Submit Date [11/29/2007 9:08:30 PM] Status* Proposed Enabled
 Last Modified By [tnel] Last Modified Date [11/29/2007 9:08:30 PM] Offline Obsolete
 Archive Delete

Save Close

On the Roles Display tab, you can review those listed with special functional roles.

Support Group SGP00000000147 (Modify)

BMC REMEDY IT SERVICE MANAGEMENT

Support Group

Support Group | People Display | Roles Display | Business Hours and Holidays

Functional Roles Display

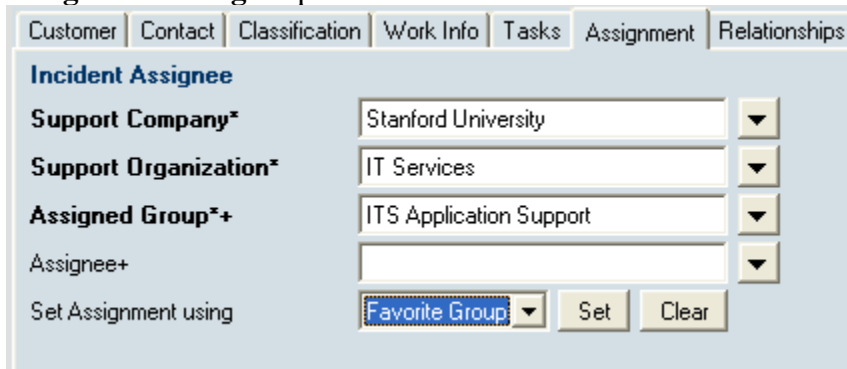
Functional Role	Full Name	Login ID	Assignment Availability
Support Group Admin	Lundin, Chris	clundin	Yes
Support Group Lead	Lundin, Chris	clundin	Yes

Submitter* [tnel] Submit Date [11/29/2007 9:08:30 PM] Status* Proposed Enabled
 Last Modified By [tnel] Last Modified Date [11/29/2007 9:08:30 PM] Offline Obsolete
 Archive Delete

Save Close

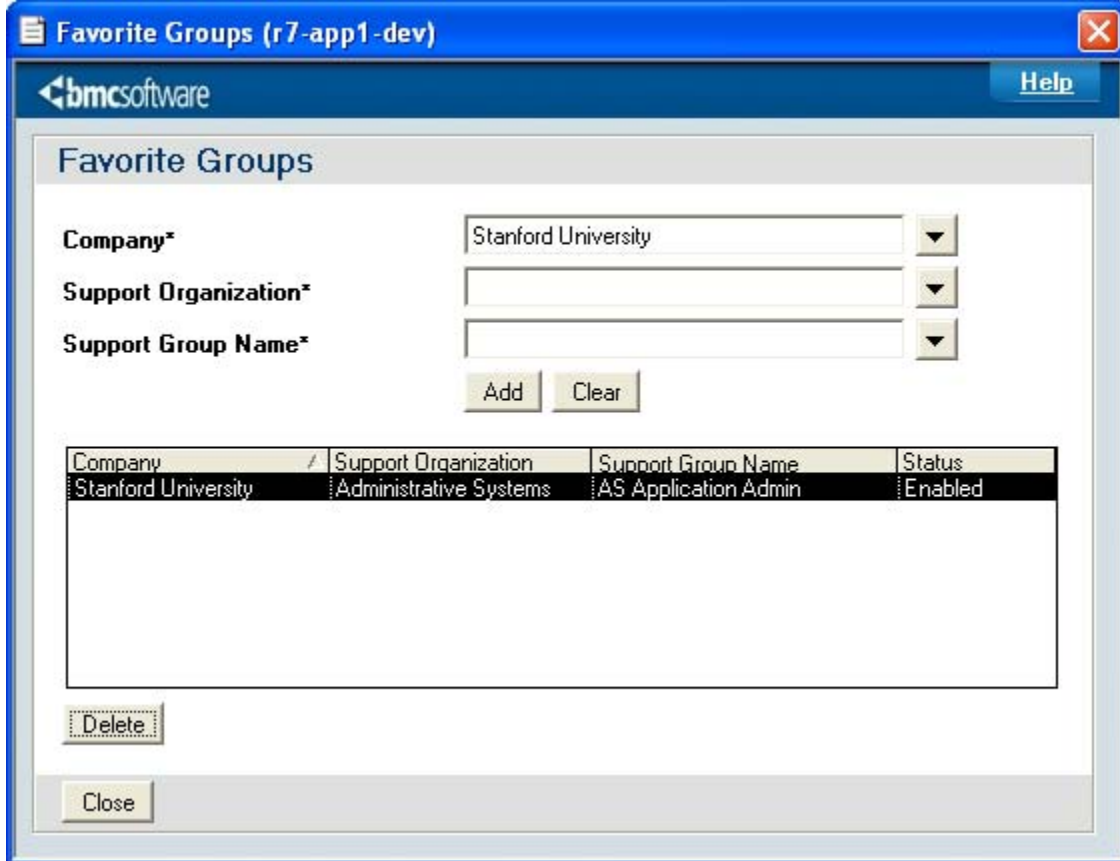
Favorites

Favorites are set by the support group lead for everyone using belonging to that group. It is used to provide quick access to frequently used reassignments. For example, if you belong to one group, and you frequently reassign your tickets to another group, you can set up the favorite so that it can be quickly accessed by choosing from the **Set Assignment using** drop-down box.



The screenshot shows a web interface with a tabbed menu at the top: Customer, Contact, Classification, Work Info, Tasks, Assignment, and Relationships. The 'Assignment' tab is selected. Below the tabs, the section is titled 'Incident Assignee'. It contains several fields with dropdown arrows on the right: 'Support Company*' with 'Stanford University', 'Support Organization*' with 'IT Services', 'Assigned Group*+' with 'ITS Application Support', and 'Assignee+'. At the bottom, there is a 'Set Assignment using' label followed by a dropdown menu currently showing 'Favorite Group', and two buttons labeled 'Set' and 'Clear'.

To create a favorite, start by going to **Group Lead Functions > User/Group Management**. Select the group you wish to modify. From the **Support Group (Modify)** screen on the **Support Group** tab, click the **Favorite Groups** tab. (In the Windows client version, click in the box to view the current list of Favorite Groups.) Click the **Update** button to add or delete Favorite Groups.



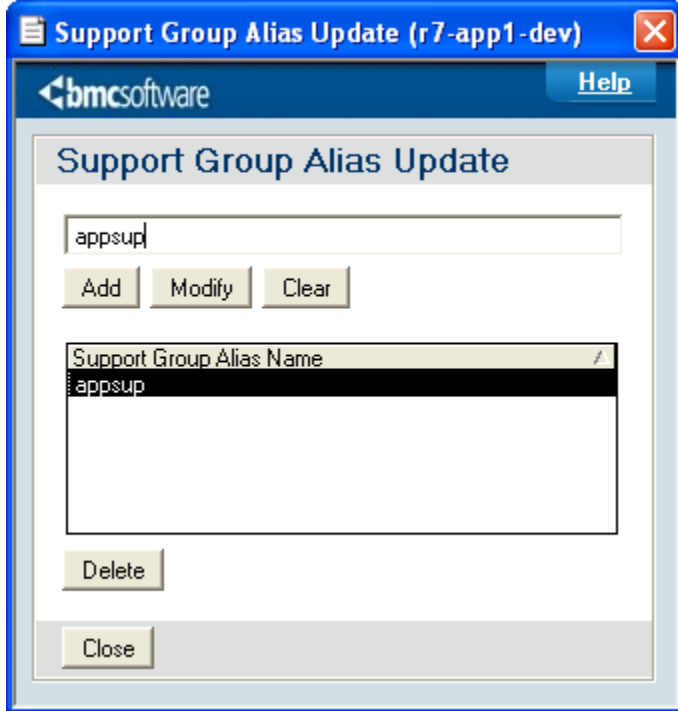
To add, use the drop-down boxes for Support Organization and Support Group name to select a new group, and then click the **Add** button. To delete, select the favorite from the table and click the **Delete** button. Confirm that you do wish to delete it.

Group Alias

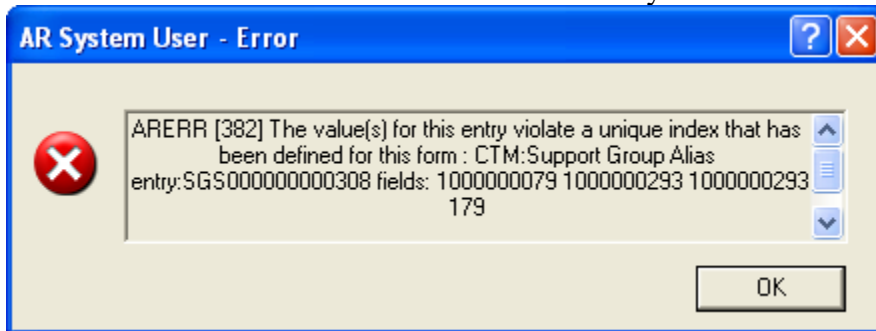
A Group Alias is a short name for your group that can be typed into the **Assigned Group** field to quickly select a Support Organization and Assigned Group combination.

For example, if the combination of Support Organization *IT Services* and Assigned Group *ITS Application Support* had the group alias of “appsup”, then tickets could be assigned by typing “appsup” in the Assigned Group field and hitting Enter.

To set a Group Alias, start by going to **Group Lead Functions > User/Group Management**. Select the group you wish to modify. From the **Support Group (Modify)** screen on the **Support Group** tab, click the **Group Alias** tab. (In the Windows client version, click in the box to view the current list of Group Aliases.) Click the **Update** button to add or delete Group Aliases.



To add a support group alias, type the alias in the field and click the **Add** button. **Note:** Group Aliases are case sensitive and must be unique. AppSup and appsup would be two separate aliases. The alias created cannot be the same as an alias used by any other group. You will see an error like the one shown below if your alias is not unique:



To delete an alias, highlight the alias in the **Support Group Alias Name** table and click the **Delete** button.