Remedy 7.0 Support Group Lead
Role, Responsibilities and Capabilities

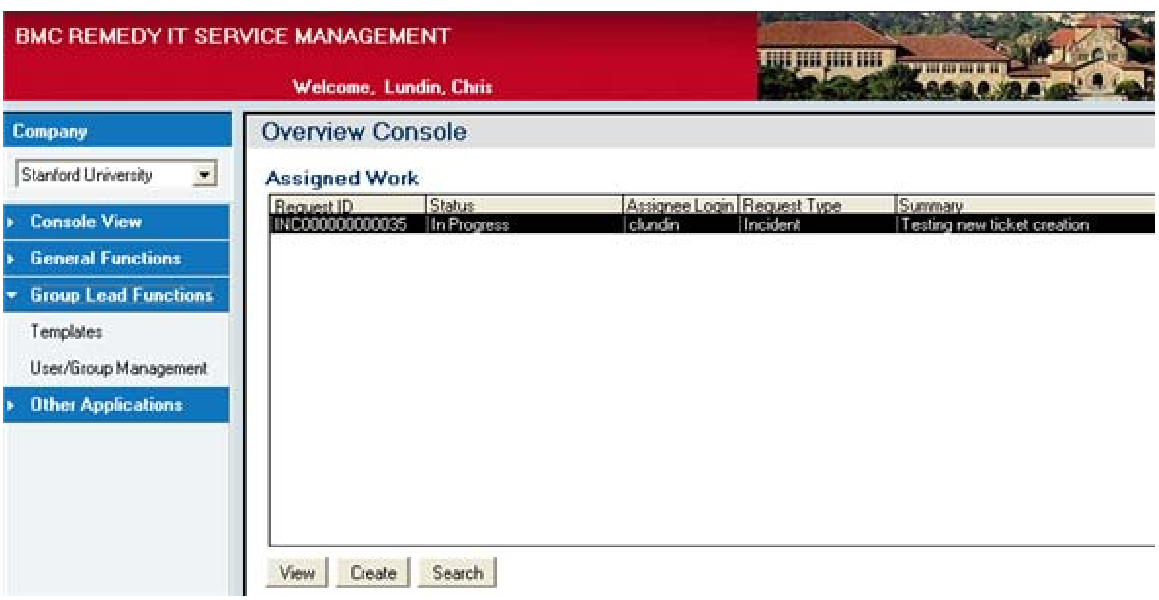
Responsibilities of Support Group Lead:

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.



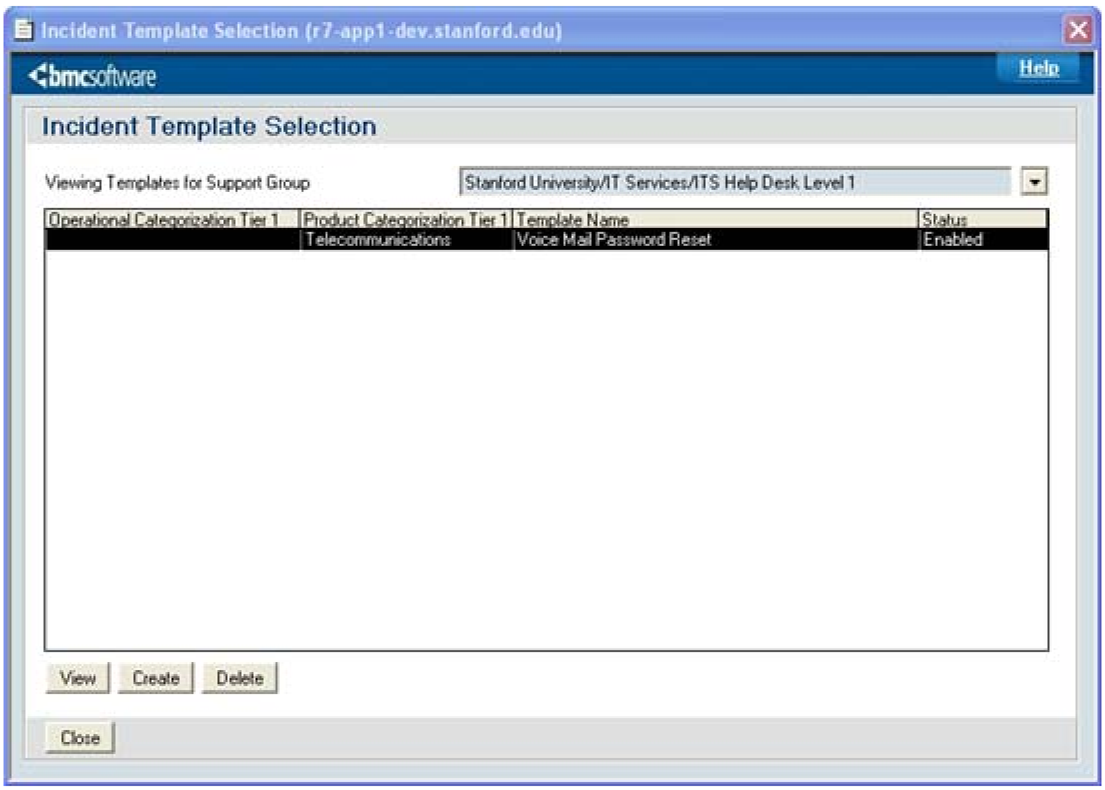
Templates

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.

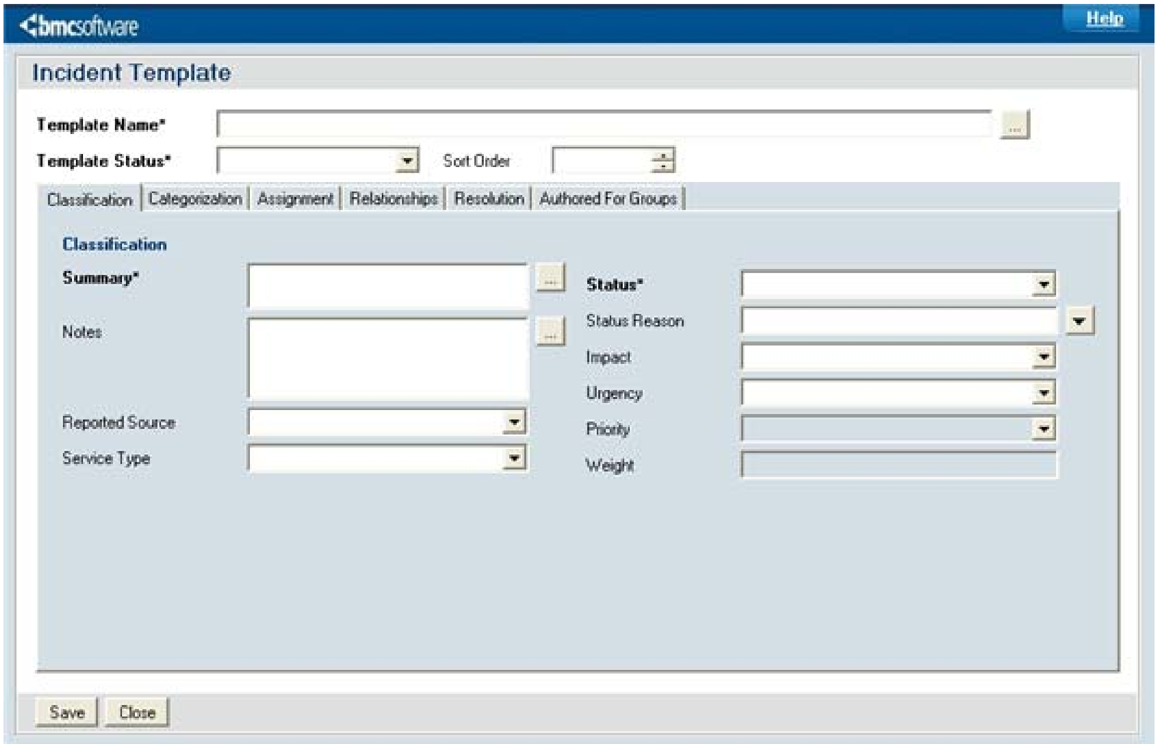
Creating Templates:

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:



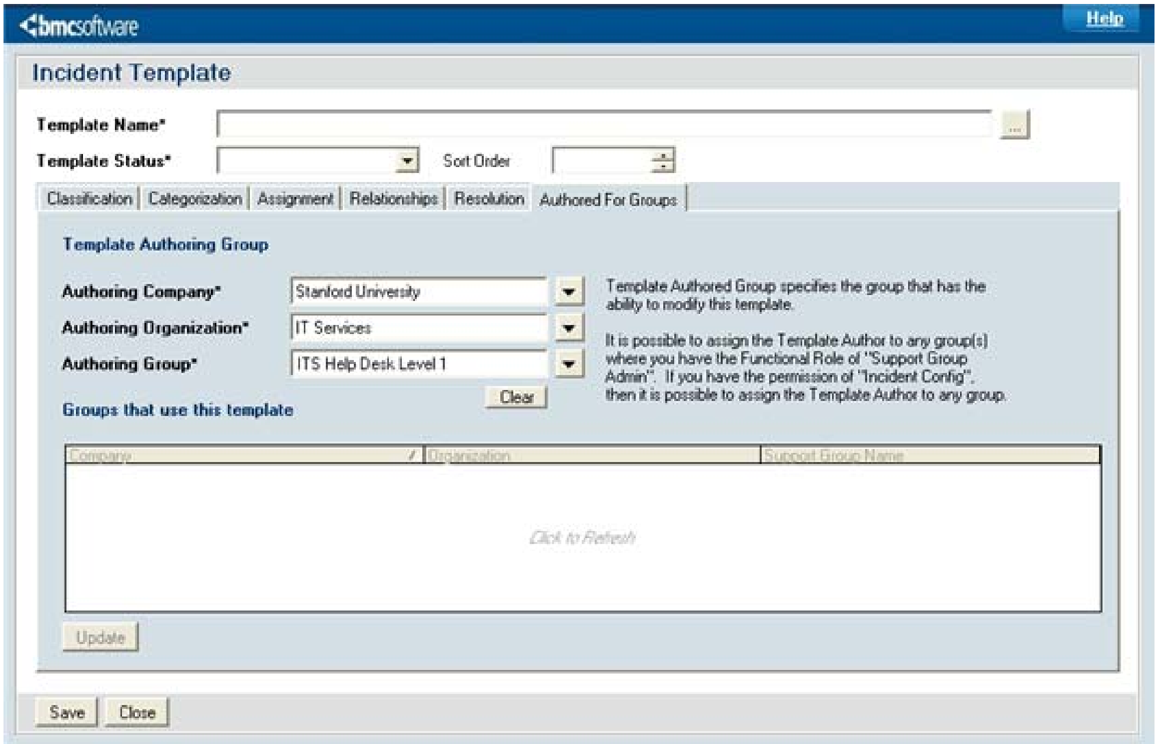
To create a new template, click 

The Incident Template creation form will open up:

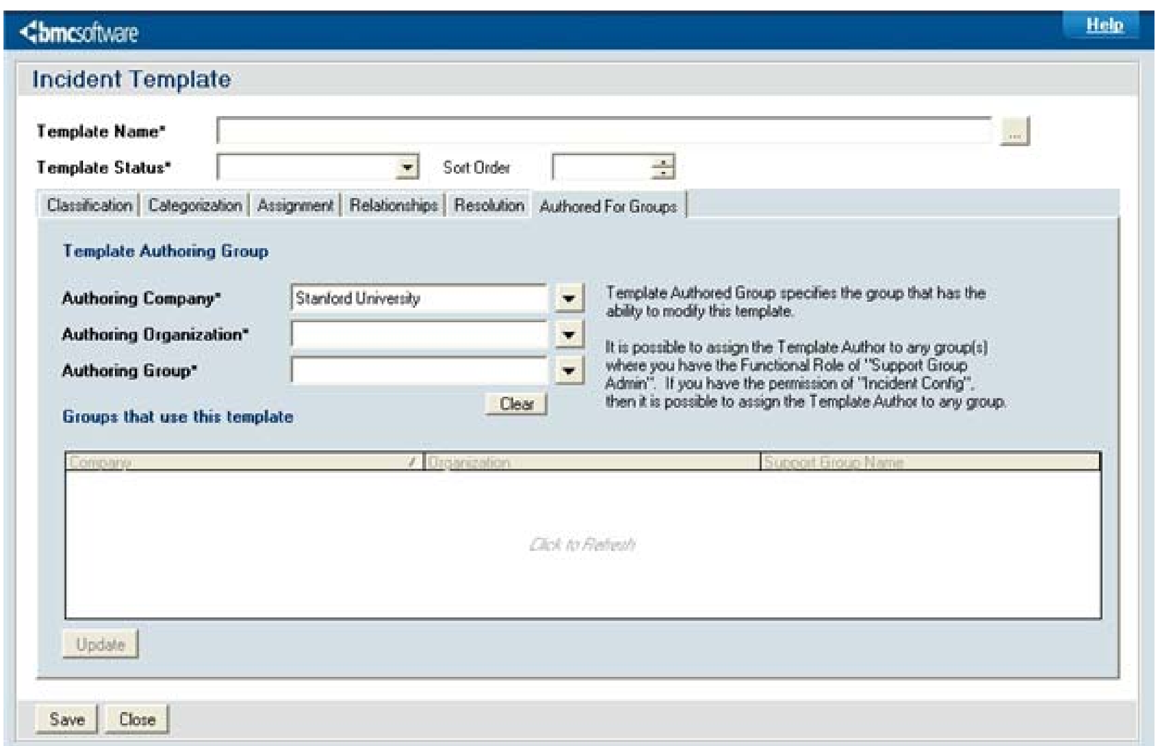


Assign the Template a descriptive name, and set its status to **Enabled**
Step through each of the Incident form tabs, completing each with whatever fields you would like auto-filled with the use of the template.

It is on the **Authored 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.



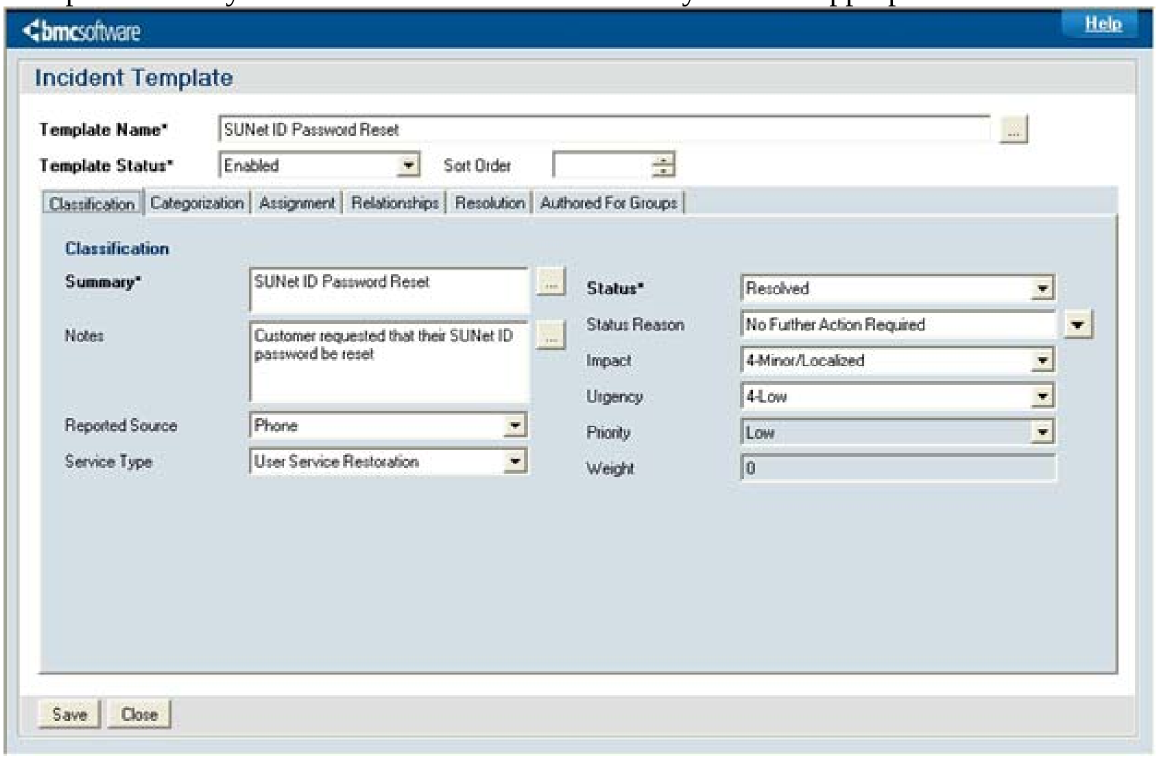
It is also on the **Authored For Groups** tab where the Support Group Lead specifies which support group(s) the template is available to.



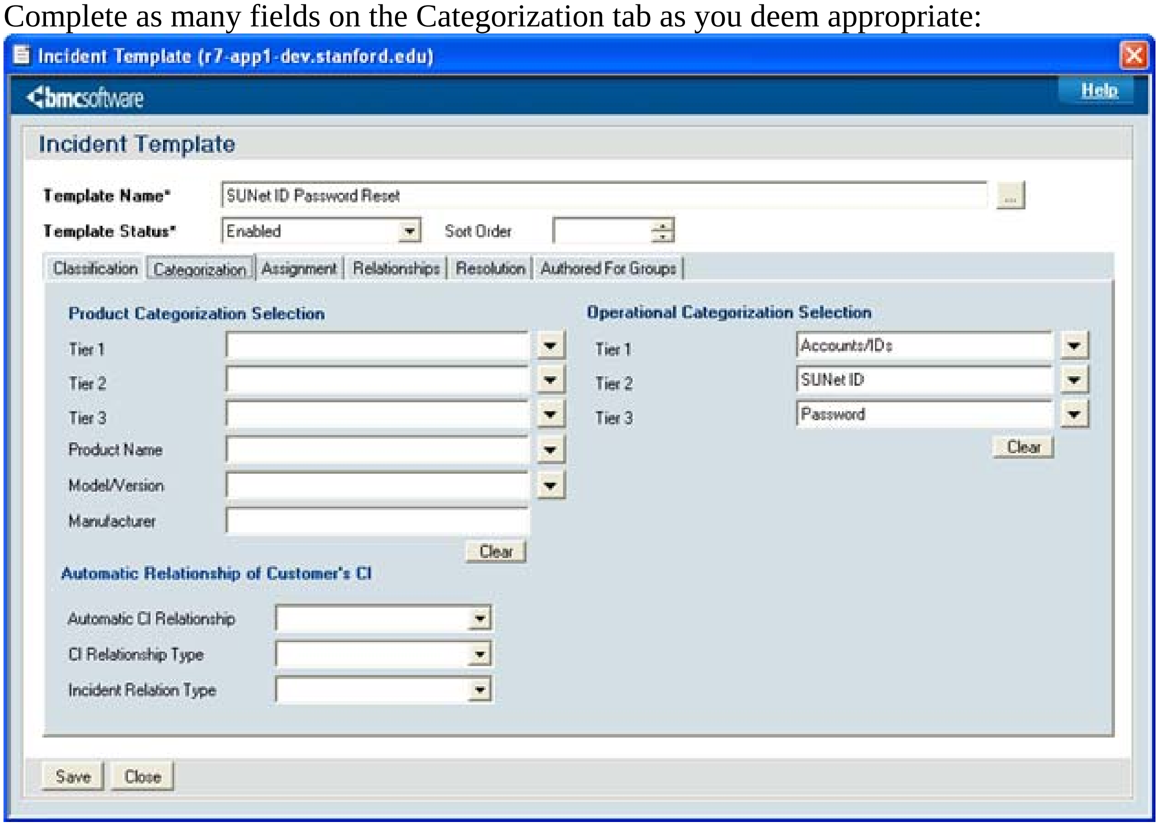
(See the separate document "Using Templates in Remedy 7" for how support staff take advantage of any templates available to them.)

Screen Shots From A Template for Resetting SUNet ID Passwords

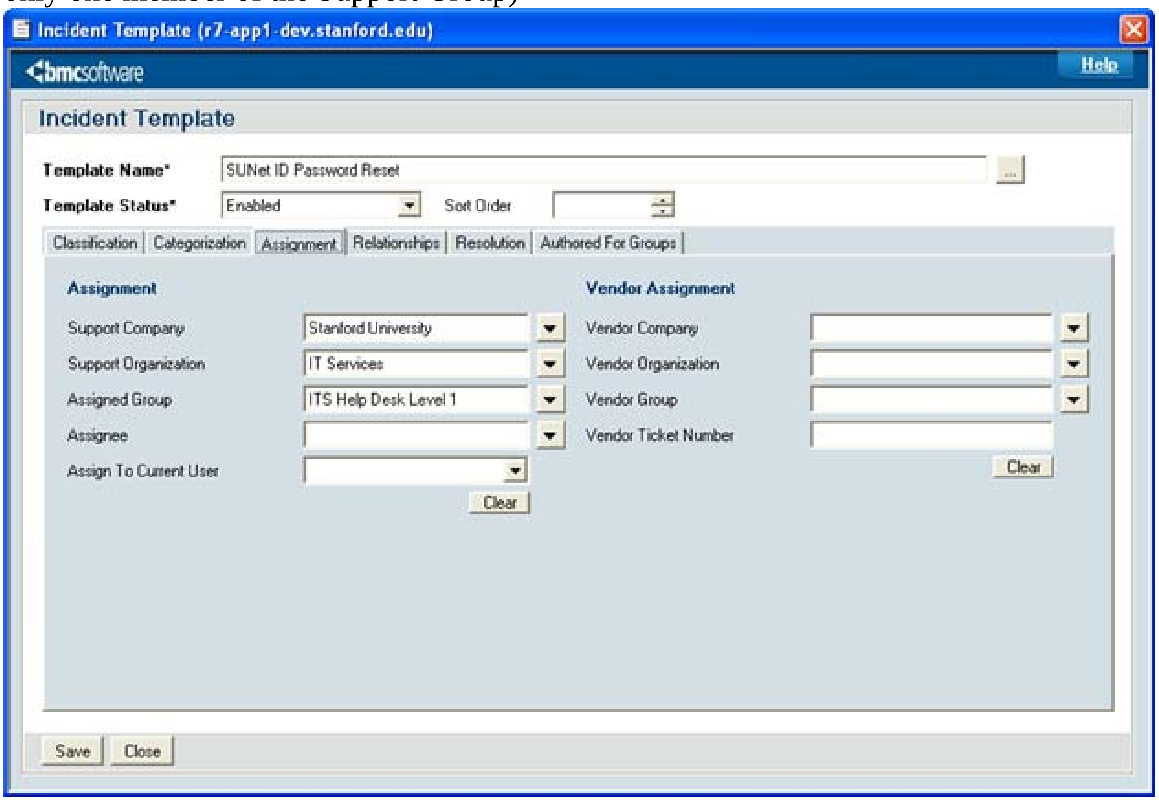
Complete as many fields on the Classification tab as you deem appropriate:



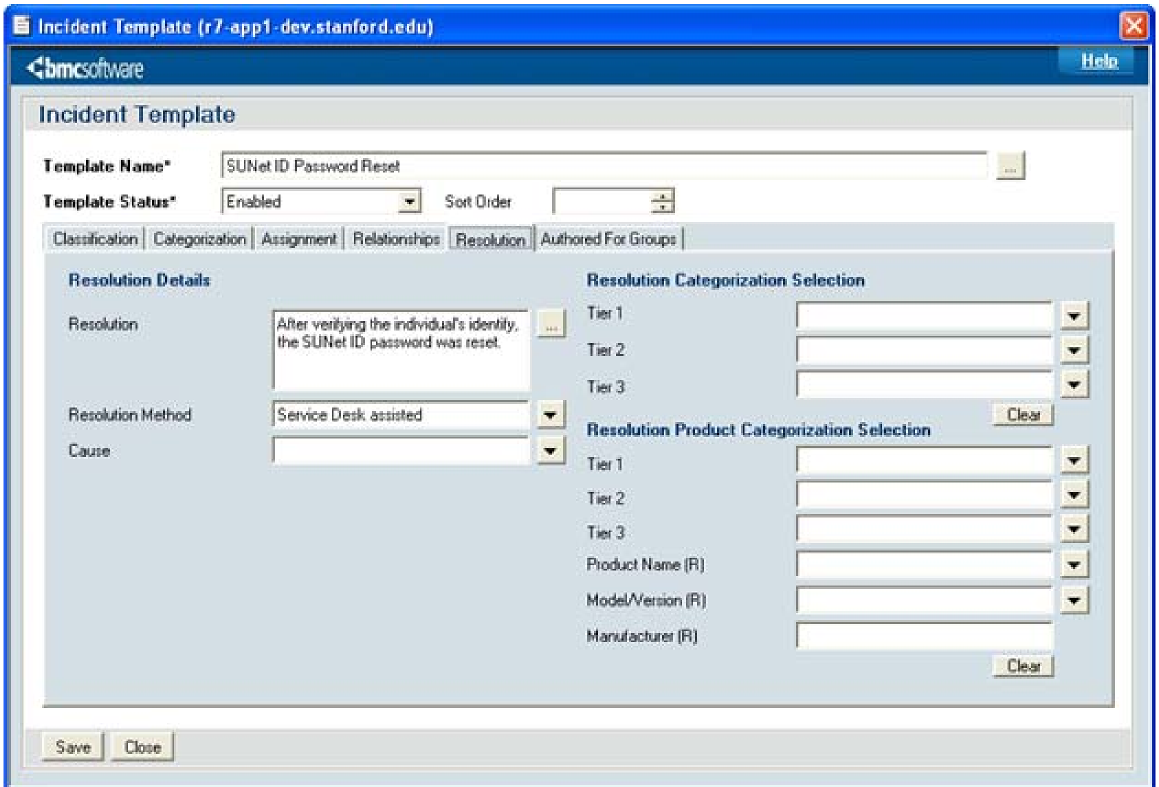
Complete as many fields on the Categorization tab as you deem appropriate:

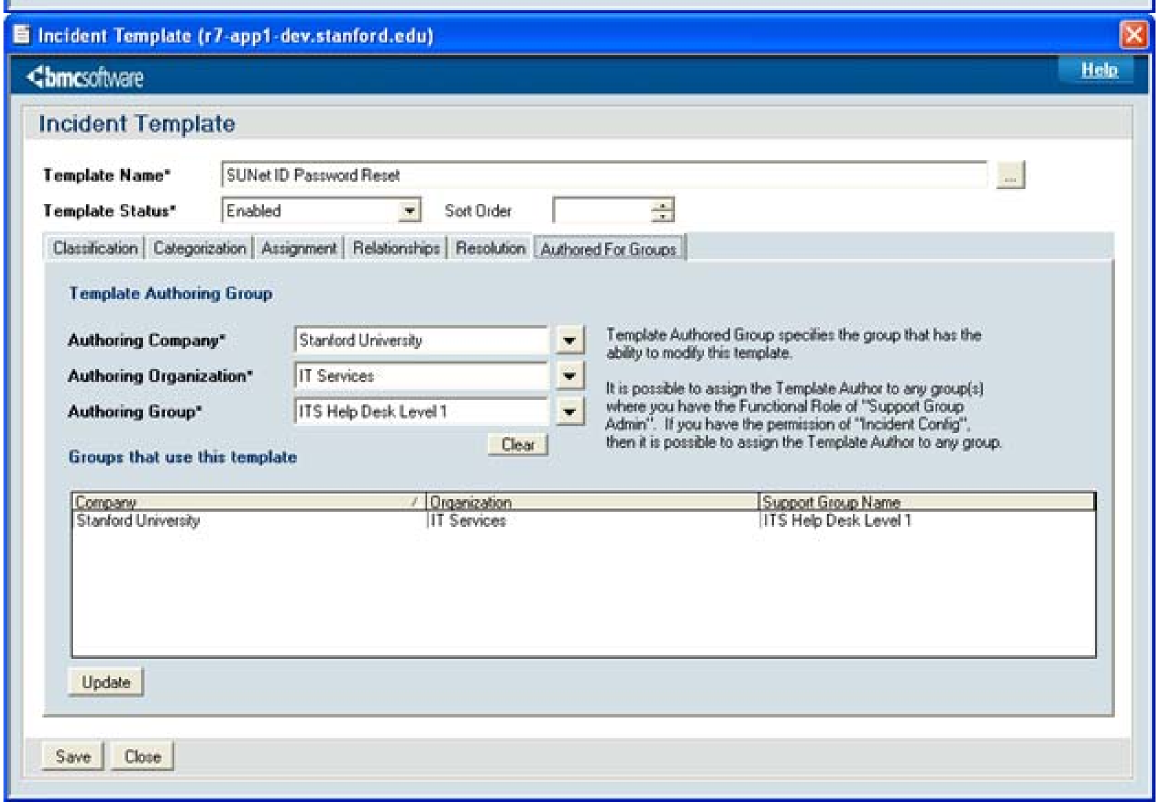


Complete as many fields on the Assignment tab as you deem appropriate. (Note that you would not want to complete the “Assignee” field as then the template would be useful to only one member of the Support Group)



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





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 

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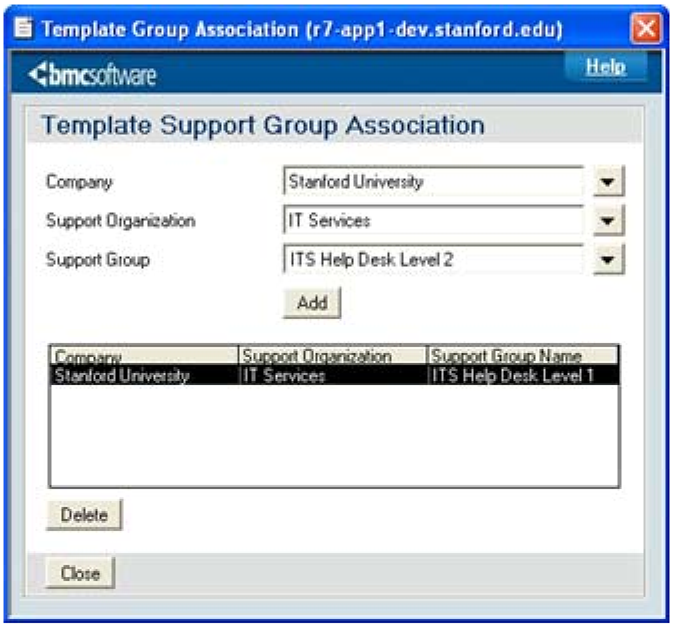
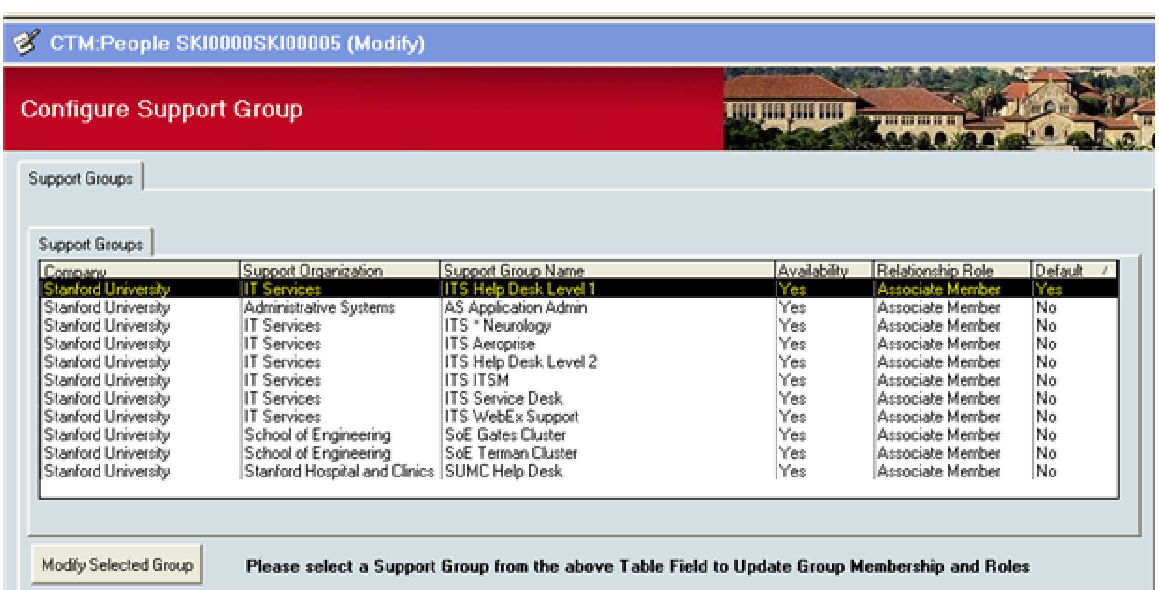


User/Group Management

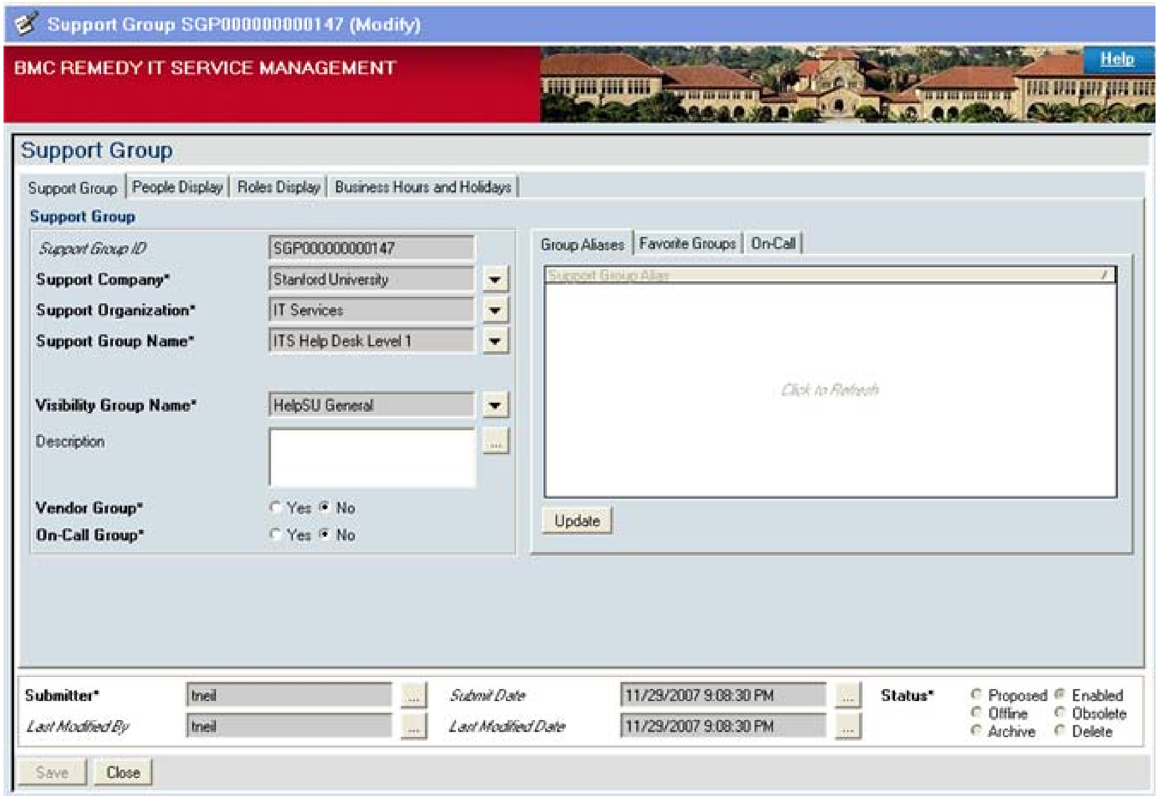
The Support Group Lead has the capability to configure users in their support groups, as well as some aspects of the group's support profile.

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



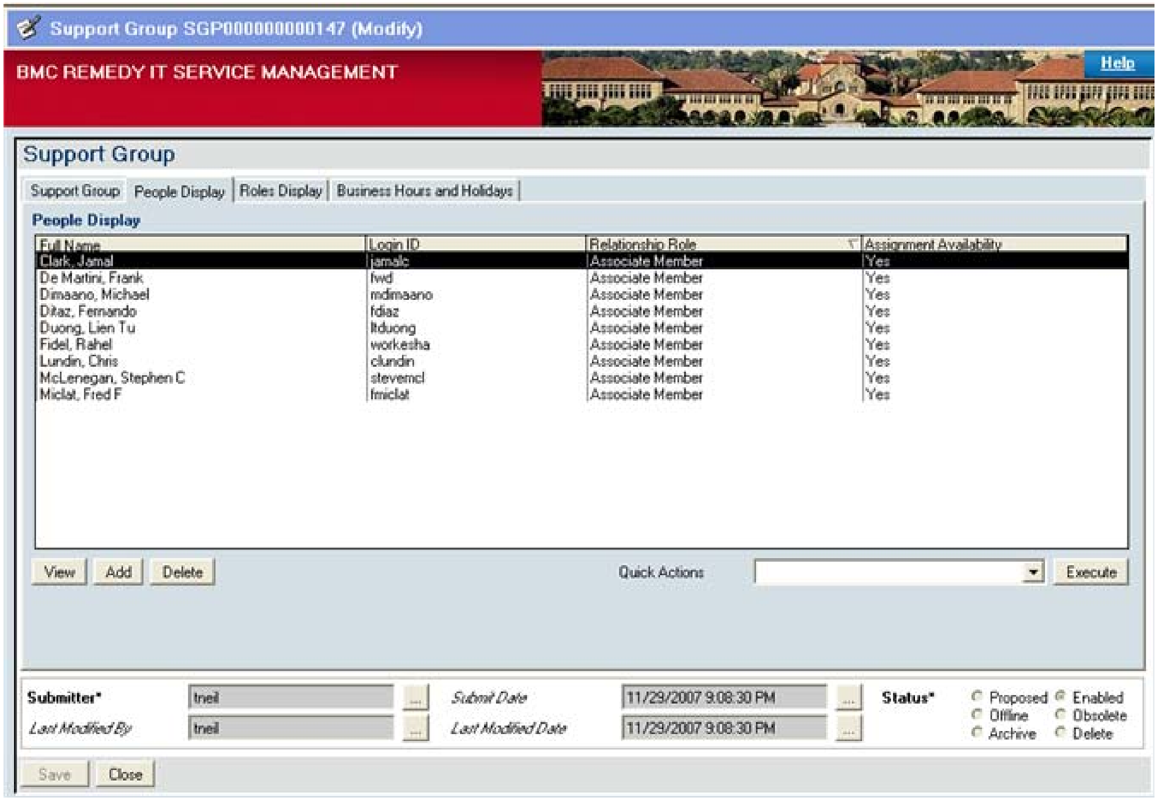
All of the groups for which the Support Group Lead has that role are displayed.

Select the group you want to work with, and click 

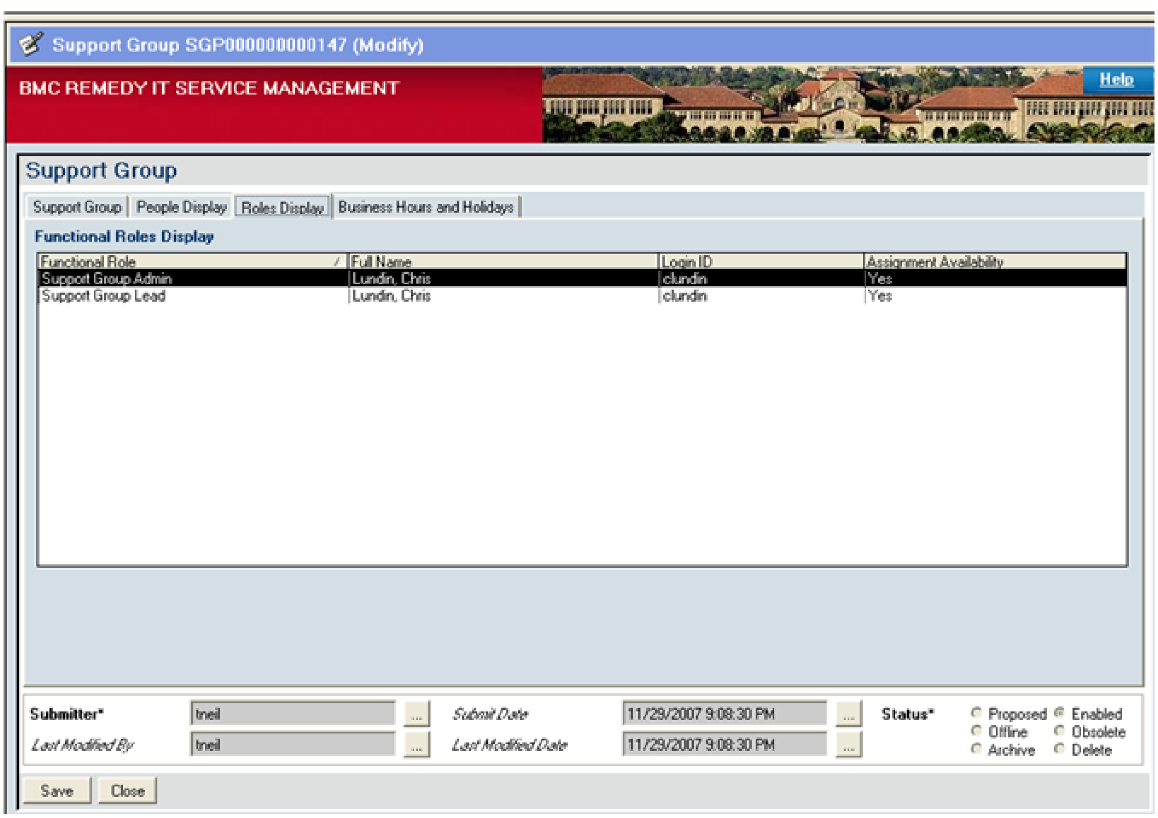


On the People Display tab, the Support Group lead can manage the membership of the support group, adding and deleting users as appropriate.
NOTE: The Support Group Leads cannot assign Remedy licenses to brand-new users, that must be done by IT Services staff via a HelpSU request
http://helpsu.stanford.edu?pcat=HelpSU

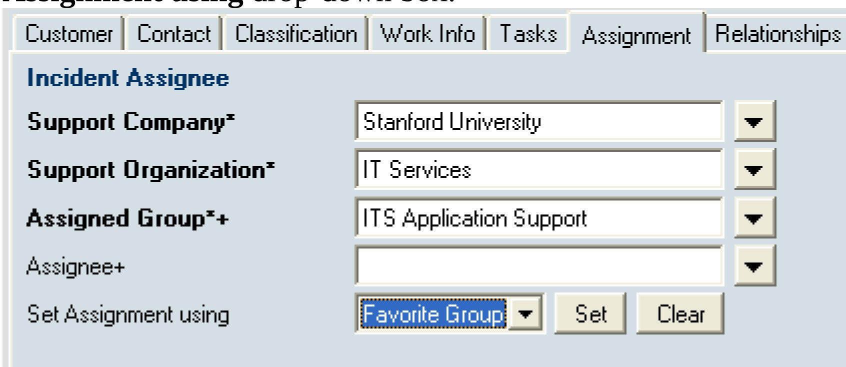
Using the **Quick Actions** menu in the lower right, you can make members of the group Available or Unavailable, if they are on vacation or leave, or just returned from same.



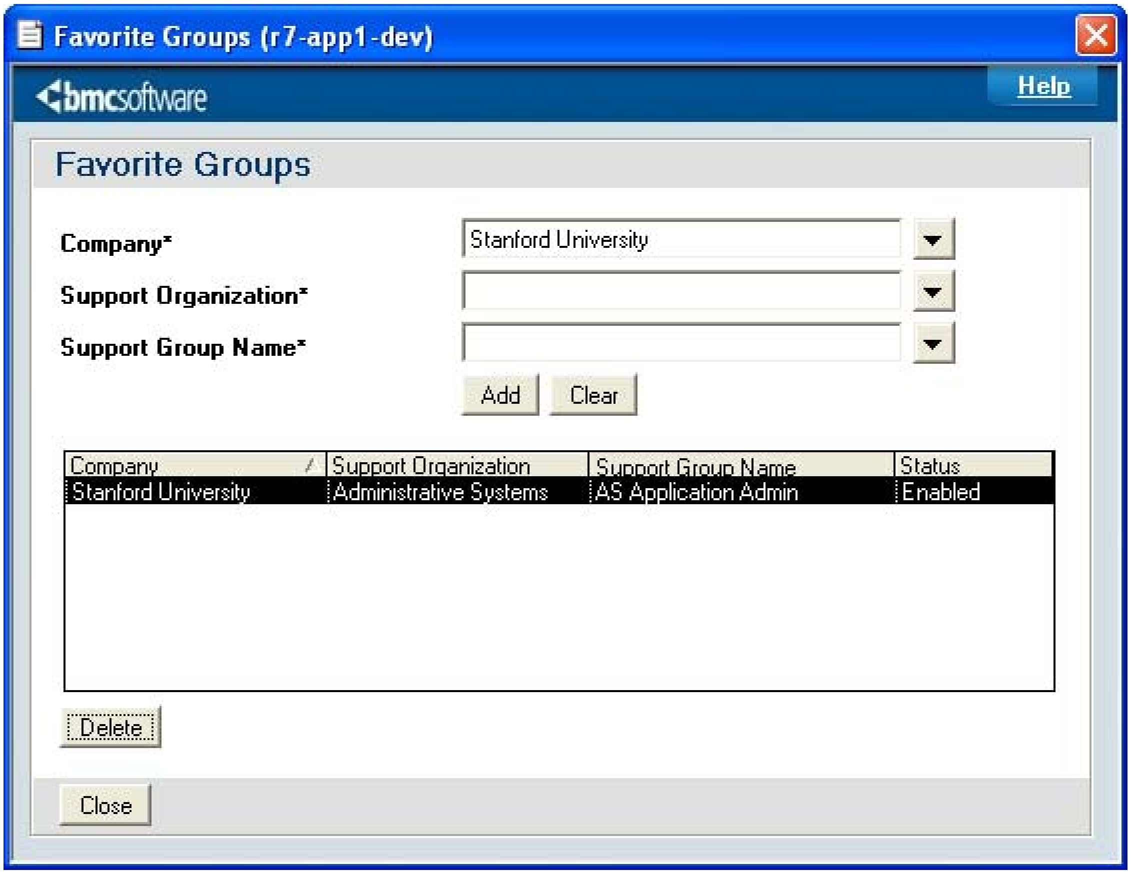
On the Roles Display tab, you can review those listed with special functional roles.



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.



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.



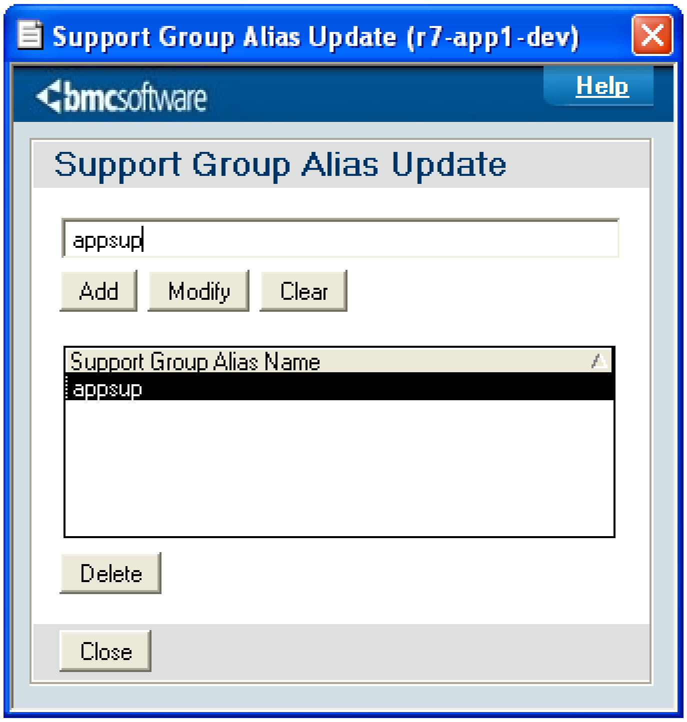
To add, use the drop-down boxes for Support Organization and Support Group name to select a new group, and then click the **Add** button. To delete, select the favorite from the table and click the **Delete** button. Confirm that you do wish to delete it.

Group Alias

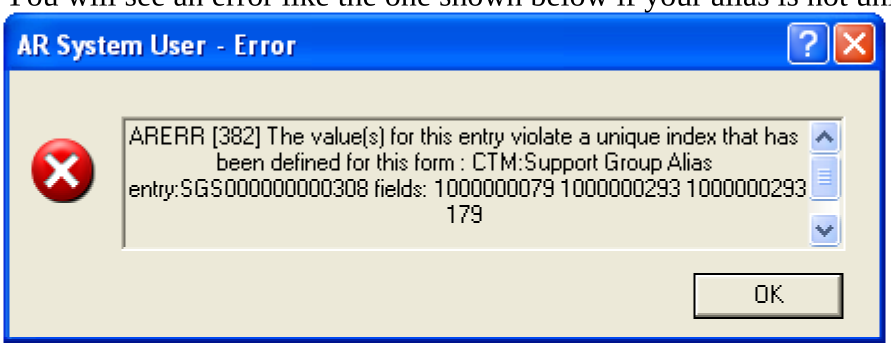
A Group Alias is a short name for your group that can be typed into the **Assigned Group** field to quickly select a Support Organization and Assigned Group combination.

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.